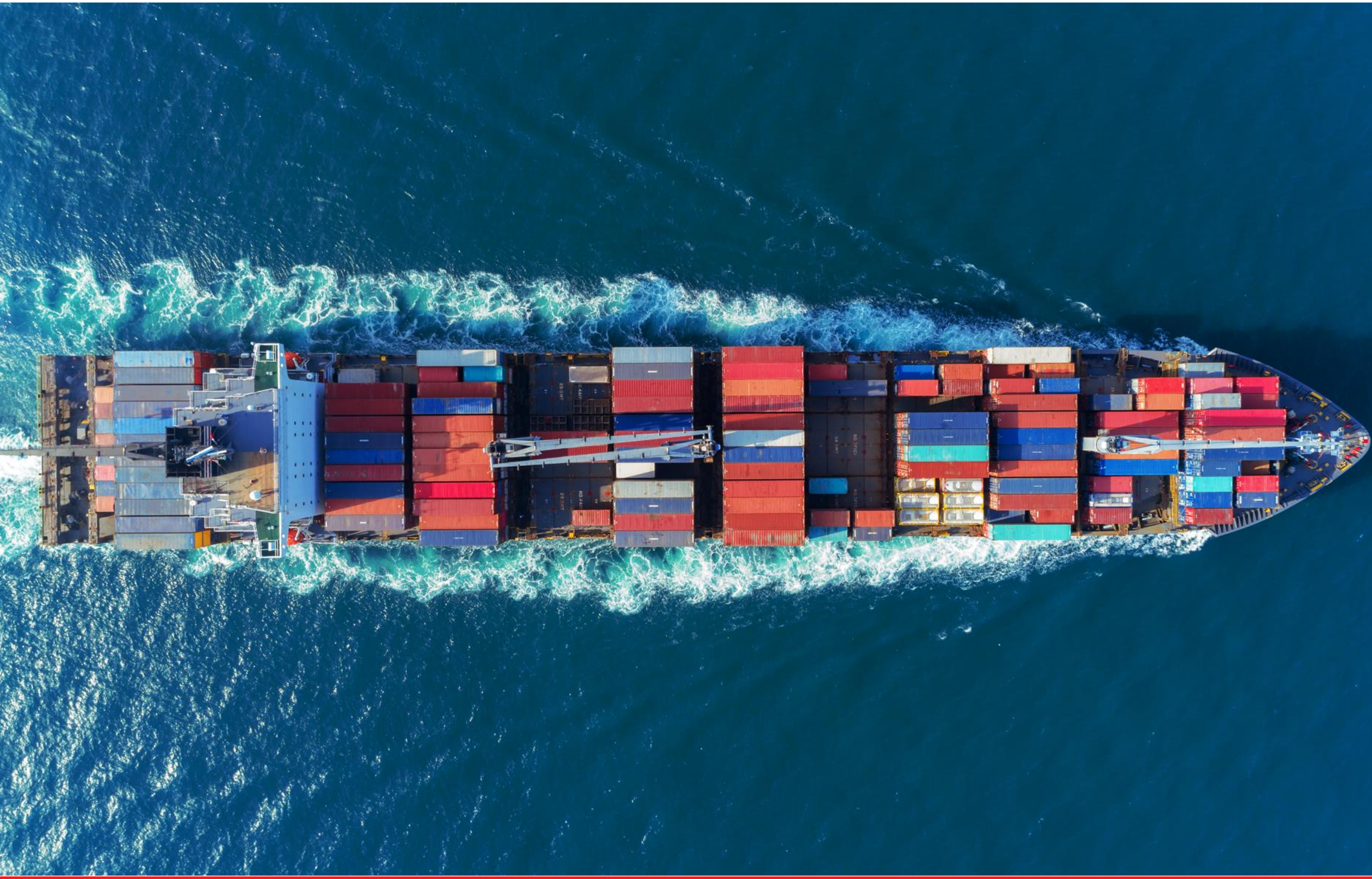

A PARTNER IN FOOD SECURITY:

Canada's Opportunity for Agri-Food Trade with ASEAN

Canada-ASEAN Business Council

THE UNIVERSITY OF BRITISH COLUMBIA
School of Public Policy and Global Affairs

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Abbreviations

A*STAR	Agency for Science, Technology and Research Singapore
AANZFTA	ASEAN-Australia-New Zealand Free Trade Area
AADCP II	ASEAN-Australia Development Cooperation Program Phase II
AAFC	Agriculture and Agri-Food Canada
AECSP	AANZFTA Economic Cooperation Support Program
AMS	ASEAN Member States
ASEAN	Association of Southeast Asian Nations
CABC	Canada-ASEAN Business Council
CanCham	Canadian Chambers of Commerce
CEPA	Comprehensive Economic Partnership Agreement
CFIA	Canadian Food Inspection Agency
CIIT	Commons Standing Committee on International Trade
CPTPP	Comprehensive and Progressive Agreement for Trans-Pacific Partnership
CSO	Civil Society Organizations
DFAT	Australian Department of Foreign Affairs and Trade
EDC	Export Development Canada
EU	European Union
FDI	Foreign Direct Investment
FIAP	Feminist International Assistance Policy
FTA	Free Trade Agreement
G20	Group of Twenty
GAC	Global Affairs Canada
GDP	Gross Domestic Product
INGO	International Non-Governmental Organization
IPAAO	Indo-Pacific Agriculture and Agri-Food Canada Office
IPCC	Intergovernmental Panel on Climate Change
IPS	Indo-Pacific Strategy
NGO	Non-Governmental Organization
NTB	Non-Tariff Barriers
NTM	Non-Tariff Measures
NTU	Nanyang Technological University
PIC	Protein Industries Canada
R&D	Research and Development
SAFEGRO	Safe Food for Growth Project
SME	Small and Medium-Sized Enterprises
SPS	Sanitary and Phytosanitary Measures
TBT	Technical Barriers to Trade
TCS	Trade Commissioner Service
UNGA	UN General Assembly
WFP	World Food Program
WTO	World Trade Organization
WUR	Wageningen University and Research

A Note from the Canada-ASEAN Business Council

This report was published as part of a collaboration between the Canada-ASEAN Business Council (CABC) and the School of Public Policy and Global Affairs (SPPGA) at the University of British Columbia (UBC).

Established in 2012, the CABC is the preeminent organization with a mandate to promote and increase trade relations between Canada and ASEAN. The CABC is headquartered in Singapore, with an office located in Concordia University in Montreal, Canada.

As the leading voice of the Canadian private sector, the mission of the CABC is to facilitate increased trade and investment in the Canada-ASEAN economic corridor through policy advocacy, networking, and education. At present, the CABC currently represents over 60 leading organizations doing business or investing between Canada and ASEAN.

In recognizing Canada's untapped potential in ASEAN's agriculture and agri-food sector, and also its ability to help solve ASEAN's rising food insecurity, the CABC established its Agriculture and Agri-Food Committee in 2022. This platform brings together leading Canadian and ASEAN businesses, government policy-makers, think tanks, and other stakeholders in the agriculture, agri-food, and agtech spaces to promote commercial partnerships, deeper dialogues, and policy action.

If you are interested in learning more about the CABC or getting involved in our Agriculture and Agri-Food Committee, please contact the Executive Director, Nicky Lung, at nicky.lung@canasean.com.

Executive Summary

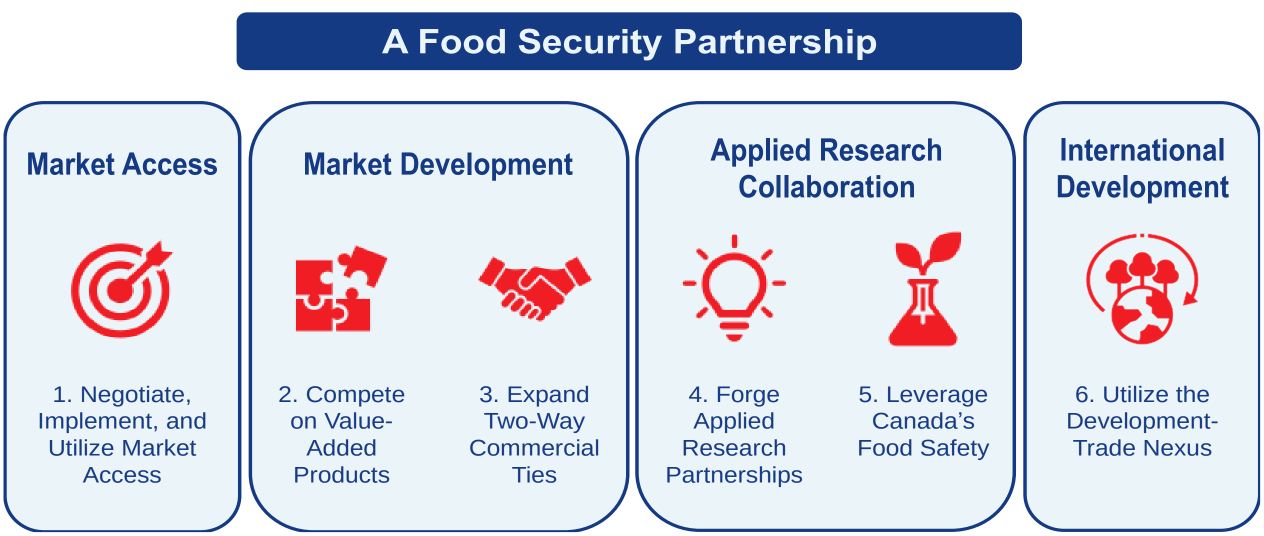
Despite being the fifth largest exporter of agriculture and agri-food goods worldwide and a global leader in safe, high-quality products, Canada's trade with the Association of Southeast Asian Nations (ASEAN) underperforms relative to its potential. According to economic modelling by the CD Howe Institute, Canada's agricultural and agri-food exports to ASEAN were 22.4% or CAD 482 million below their estimated potential between 2017 and 2019.[1]

Negotiations towards a Canada-ASEAN Free Trade Agreement (FTA) and Canada-Indonesia Comprehensive Economic Partnership Agreement (CEPA) are a crucial first step in addressing this challenge. In a highly competitive and heterogenous market, however, a more comprehensive strategy is required to align Canada's value proposition with ASEAN's interests—namely in food security.

Although ASEAN is one of the world's fastest-growing regions,[2] food security remains a crucial concern, with approximately 18.8% of the population being moderately or severely food insecure.[3] As a global leader in high-quality agricultural commodities, agtech, biotech, plant science, food safety, and sustainability, Canada has an opportunity to strengthen its trade while responding to ASEAN's food security challenges through the strategy of a Food Security Partnership, illustrated in Figure 1 below.

Drawing on interviews with 26 experts in agri-food trade from Canada and Southeast Asia, the four areas of engagement under this Partnership include market access, market development, applied research collaboration, and international development. Engaging in these four areas through the lens of food security will ensure that Canada leverages its value-proposition, while keeping pace with and distinguishing itself from competitor countries over the long term. This report presents six strategies and detailed recommendations for Canadian industry, government, and other partners to advance these areas of engagement under the umbrella of a Food Security Partnership.

Figure 1: Proposed Canada-ASEAN Food Security Partnership

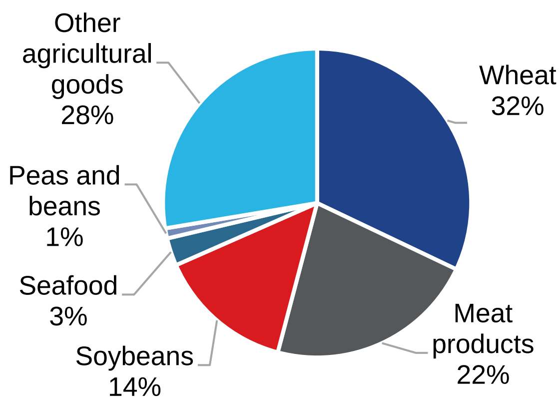


State of Play: Canada-ASEAN Agriculture and Agri-Food Trade

Canada is the 5th largest producer of agriculture and agri-food goods globally, exporting around the world primarily grains, pulses, and meats.[4] Canada's value proposition is its globally reputable and respected agri-food strengths, which sets Canada apart from competitors. These include high-quality agricultural commodities, agtech, biotech, plant science, food safety regulations, and other world-leading sustainability solutions for food production. However, interviewees consistently stressed that these strengths are underutilized in Canada's engagement with the Association of Southeast Asian Nations (ASEAN) to date.

Canada's exports of agriculture and agri-food goods to ASEAN have increased steadily from USD 1.2 billion in 2011 to USD 2.1 billion in 2021, averaging approximately 7% growth each year.[5] Across this period, Canada's share of ASEAN's total imports in this sector have remained constant at approximately 1.8%. In 2021, Canada's top five largest agriculture and agri-food exports to ASEAN were wheat, meat products, soybeans, seafood, and peas and beans, shown in Figure 2.

Figure 2: Canada's Top 5 Agricultural Exports to ASEAN in 2021 (% of total sales)



Source: Government of Canada. "Report - Trade Data Online." 2023. https://tinyurl.com/3rrjj7hp

In a 2022 report, the CD Howe Institute modelled how much Canada should be trading with ASEAN given a number of factors including the two economies' sizes, distance, commonalities that reduce trade costs, and patterns of comparative advantage (see Figure 3 below).[6] The authors found that, between 2017 and 2019, Canada's actual agri-food exports to ASEAN were CAD 482 million or 22.4% lower than the model's expected trade values. This represents a significant opportunity for Canada to strengthen trade in a growing market—the overarching objective of this report.

Figure 3: Canadian Exports to ASEAN (Average 2017-2019) Compared to Predicted Levels

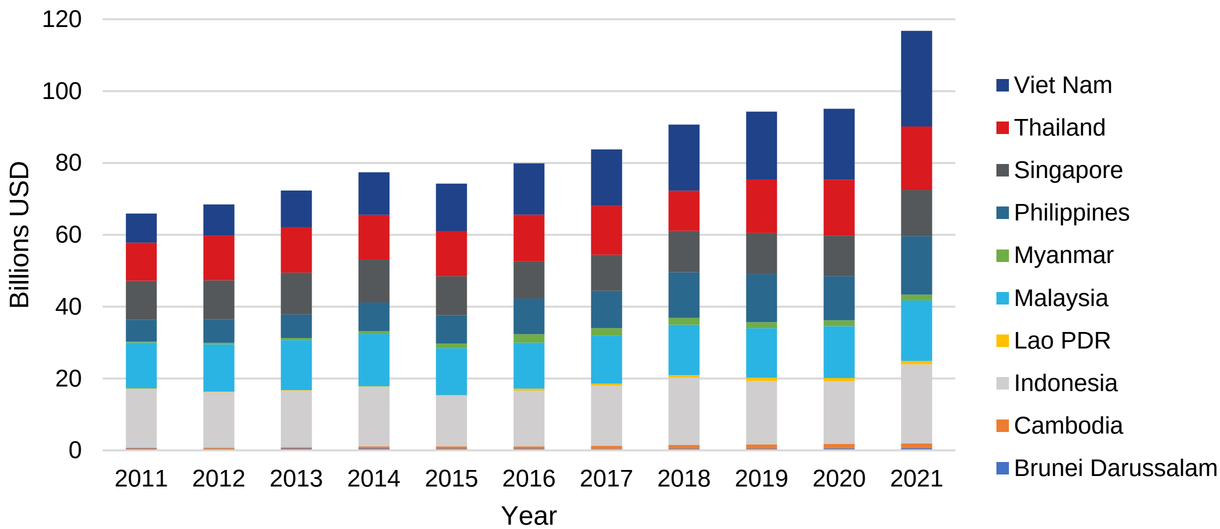
Sector	Actual (CAD millions)	Predicted (CAD millions)	Under-trading (CAD millions)	Under-trading (% of predicted)
Goods (excl. precious metals & fossil fuels)	6,035	5,542	506	7.7%
Agri-food	1,668	2,150	482	22.4%
Manufacturing	4,367	4,483	116	2.6%

Source: Dan Ciuriak, Lucy Ciuriak, Ali Dadkhah, Yingkang Lyu, and Yun Wen. Canada's Pivot to the Indo-Pacific: The Strategic Importance of Prioritizing a Trade Agreement with ASEAN. (The C.D. Howe Institute, 2022). https://tinyurl.com/26pxjh86.

ASEAN's 10 member states are highly heterogeneous and span a wide range of population sizes, Gross Domestic Products (GDP), and per capita incomes and as a result, consumers are highly price sensitive.[7] The agriculture and agri-food sector is essential to several ASEAN members states' economies, accounting for as much as 25-32% of GDP and 35-47% of employment in Indonesia, Thailand, Malaysia, Vietnam, and the Philippines.[8] ASEAN's agri-food markets are highly competitive as well. Canada's exports face competition from a number of countries including Australia and New Zealand, European countries such as the Netherlands, the United States, and other Asian countries including China, Japan, and South Korea. Many of these competitor countries have long-standing cultural, commercial, and diplomatic ties with ASEAN members states, which is reflected in a robust presence in the agriculture and agri-food sector.

ASEAN is one of the fastest-growing regions worldwide. While global GDP grew by 30% between 2011 and 2021, ASEAN's GDP grew by 43%.[9] The region's market for agriculture and agri-food goods is sizeable and growing steadily. ASEAN's agriculture and agri-food imports from all trading partners have increased by approximately 6% per year on average from USD 65.9 billion in 2011 to USD 116.8 billion in 2021, as shown in Figure 4.[i]

Figure 4: ASEAN Total Imports of Agriculture and Agri-Food Goods (Billions USD)



Source: "Trade in Goods (IMTS), Annually, HS 2-Digit up to 8-Digit (AHTN), in US$." https://data.aseanstats.org/trade-annually.

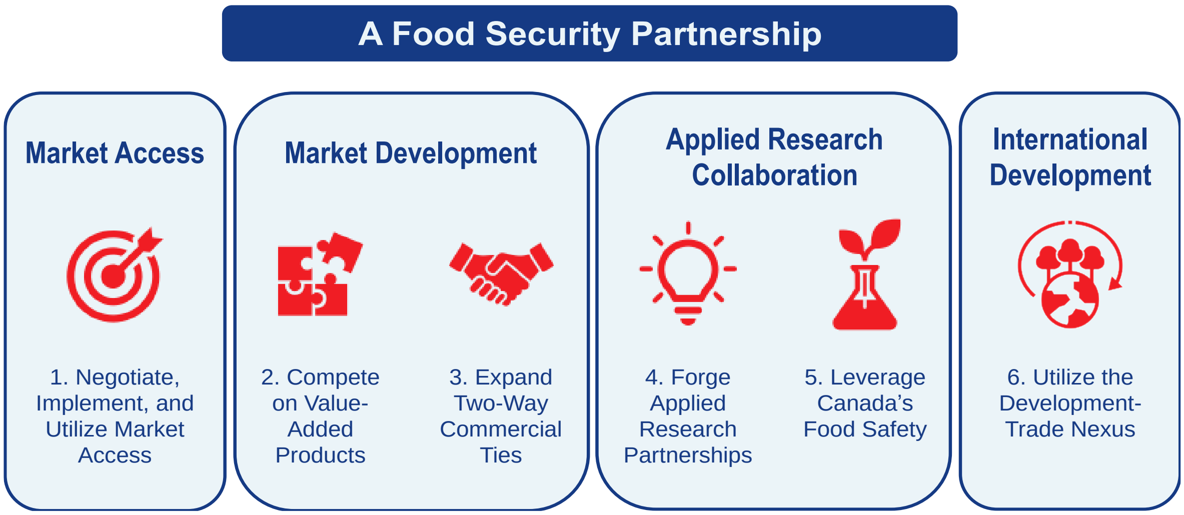
Although negotiations towards a Canada-ASEAN Free Trade Agreement (FTA) and Canada-Indonesia Comprehensive Economic Partnership Agreement (CEPA) are underway, this report argues that market access is a necessary, but not sufficient, condition to boost agri-food trade. Greater engagement in market development, applied research collaboration, and international development through the lens of food security will help ensure that market access translates into growth in Canada's agri-food trade.

Part one of this report describes the threats and opportunities for Canada to be a major food security partner, and the challenges Canadian companies and experts report in trading with ASEAN. Part two analyzes Canada's engagement with the region across market development activities, applied research collaboration, and international development, drawing lessons from country case studies of Australia and the Netherlands. Finally, this report will present six

[i] For the purposes of this calculation, agriculture and agri-food goods includes HS codes 01 to 23 inclusive.

strategies for Canadian government, industry, and other stakeholders to strengthen agriculture and agri-food trade that capitalize on Canadian strengths and respond to ASEAN's food security challenges. Together, these six strategies are the pillars of a Canada-ASEAN Food Security Partnership, illustrated in Figure 5 below.

Figure 5: Proposed Canada-ASEAN Food Security Partnership

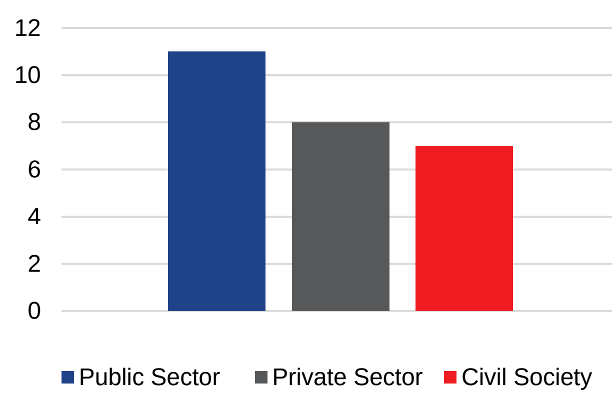


Research Methods

This research was conducted through semi-structured interviews with 26 trade and agri-food subject matter experts in the public sector, private sector, and civil society, which were supplemented by desktop research. Interviews were conducted between November 2022 and February 2023 remotely and in-person with experts in Canada, Singapore, and Vietnam. The breakdown of experts between sectors is shown in Figure 6. To respect confidentiality of interviewees, all were given full anonymity in this report.

The authors also attended the Food and Hotel Vietnam convention in December 2022 and "Canadian Agri-Food in a Hungry World" conference in January 2023 hosted by the Canadian Agri-Food Policy Institute, Canadian Agri-Food Trade Alliance, and Canadian Global Affairs Institute. Given limited time and resources for travel, Singapore and Vietnam were selected based on practical considerations (i.e., CABC's location in Singapore, one of the author's fluency in Vietnamese) and strategic considerations (e.g. both countries are parties to the Comprehensive and Progressive Trans-Pacific Partnership (CPTPP) and high-priority markets for Canada going forward). As AMS are highly heterogenous, this report aims to extrapolate findings from these two countries without making unsubstantiated generalizations.

Figure 6: Number of Experts Interviewed by Sector



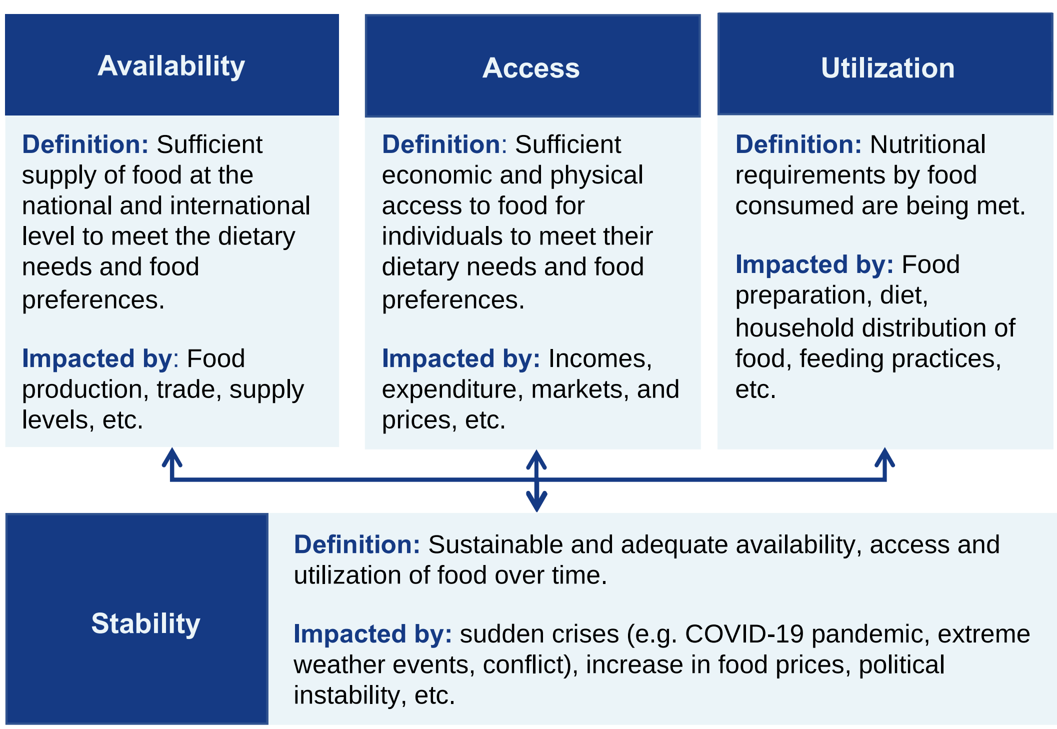
Food Security: A Threat and An Opportunity

GLOBAL RISING FOOD INSECURITY

Food insecurity is at a critical point globally today. The combination of several compounding crises, including Russia's invasion of Ukraine, the aftermath of the COVID-19 pandemic, rising global inflation, and climate change, has exacerbated existing levels of food insecurity and malnutrition. According to the World Food Program (WFP), roughly 349 million people were acutely food insecure globally in 2022, an increase of 21% from 2021[10]. Given this rise, policy makers and governments around the world increasingly view food security as a critical security issue which has important implications for national stability and long-term economic health. Food security has thus risen to the top of the policy agenda in global governance forums, as demonstrated by the Leaders' Summit on Global Food Security, which occurred on the sidelines UN General Assembly (UNGA) in September 2022.[11] Further, food security was a recurring theme in the G20 leaders' declaration in November 2022 under Indonesia's leadership.[12]

Food security is defined as "when all people, at all times, have physical and economic access to sufficient safe and nutritious food that meets their dietary needs and food preferences for an active and healthy life."[13] There are four dimensions of food security: availability, access, utilization, and stability[14] (see Figure 7 below). The complexity of this problem requires innovative and cross-cutting solutions.

Figure 7: Dimensions of Food Security



Source: Food and Agriculture Organization (FAO). "Food Security Information for Action Practical Guides.", 2008.

FOOD INSECURITY IN SOUTHEAST ASIA

Food insecurity is of particular concern across Southeast Asia. In 2020, there were roughly 125.4 million[15] people in Southeast Asia who were moderately or severely food insecure. This equates to roughly 18.8%[16] of the population, which is an increase of roughly 7% from 2019. The proportion of the population who are food insecure across the region varies significantly (see Figure 8 and 9 below), which illustrates the importance of looking at each country individually to understand the drivers of food insecurity and their needs.

Interviewees anticipate that food insecurity will continue to worsen in Southeast Asia if left unaddressed due to climate change, economic shocks, reliance on small-scale agriculture, and high levels of inequality[17]. As the region has seen rapid economic growth and increases in population, inequality between and within AMS has also risen, and putting greater pressure on its natural resources and land[18]. The economic shocks resulting from the COVID-19 pandemic also had devastating effects on the poorest and most vulnerable across Southeast Asia, where supply chain disruptions and subsequent rising food prices impacted the food security of millions.[19] Roughly 75% of households in Southeast Asia experienced a decrease in incomes due to the pandemic[20], which directly impacted households' ability to purchase sufficient food.

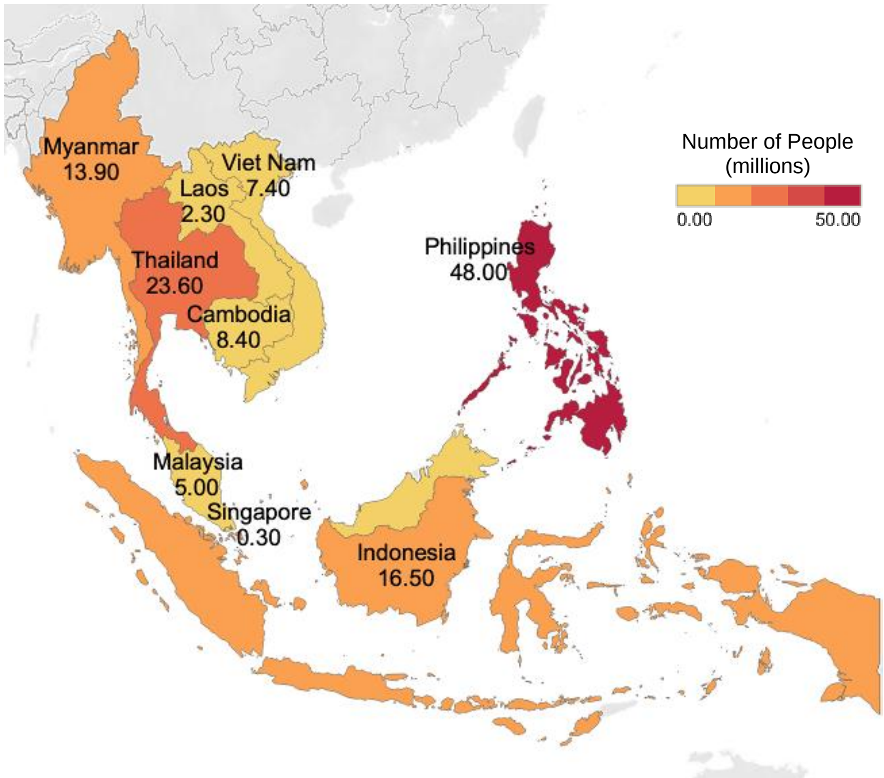
Compounding these challenges has been the impacts of climate change on domestic food production, with further devastating impacts forecasted. As weather patterns become increasingly variable, temperatures rise, and extreme weather events (i.e. floods, droughts, etc.) occur more frequently across the region, the Intergovernmental Panel on Climate Change has found that food supply will decrease and prices will rise, leading to greater food insecurity in Southeast Asia[21]. Given that most farmers across the region are small-holder and rely on agriculture and fisheries for their livelihoods, these climate-related impacts threaten economic security for the region as well.

Roughly 31% of rice consumed by Asia and 28% globally is produced by AMS[22], indicating the importance of the ASEAN agriculture sector for both global and regional food security. While Thailand, Vietnam and Cambodia are major global exporters of rice, Indonesia and the Philippines are the biggest importers.[23] An Asian Development Bank study projects that by 2100, rice yields across the region could decrease by 50%, leading to a loss of 6.7% of combined GDP each year[24]. To help support ASEAN in mitigating these impacts and protecting its agricultural sector, experts consistently emphasized that Canada could play an instrumental role and become a food security partner by leveraging its agri-food strengths.

AMS are highly dependent on imports for their food sources, which makes them vulnerable to external shocks (i.e. price shocks, supply chain disruptions, etc.). To build capacity of their own food systems, several AMS are pursuing varying degrees of import diversification and self-sufficiency. Interviewees agreed that it is entirely legitimate for states to pursue greater self-sufficiency but observed that some countries' objectives may be very difficult and costly to achieve.

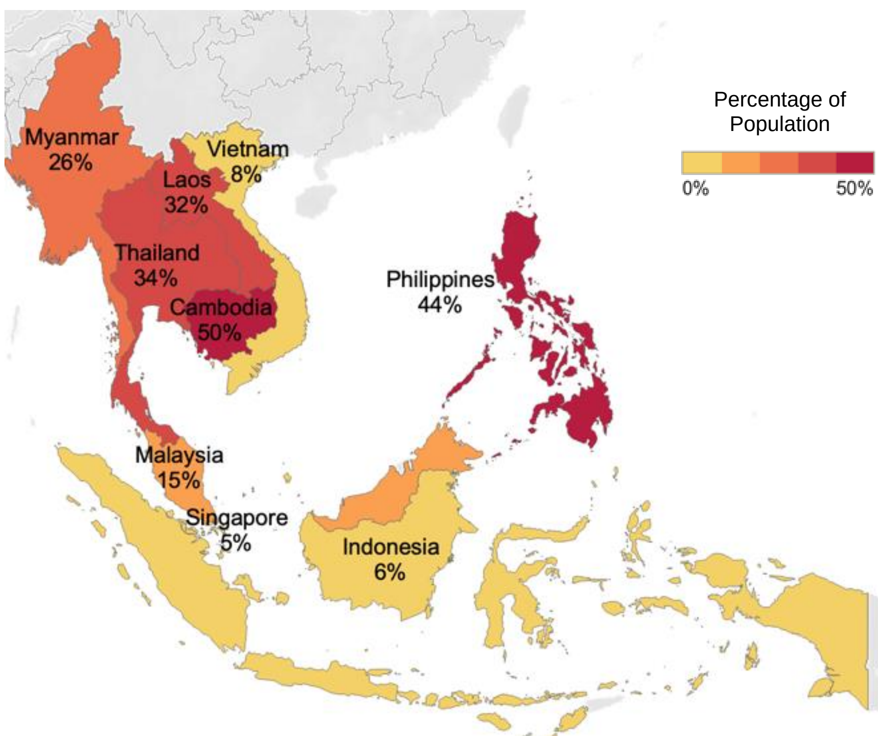
In response to food insecurity, AMS face a dilemma to either look to trade to meet their food needs or pursue self-reliance. In response to the former policy, Canada can position itself as a reliable source of high-quality and safe agricultural commodities and value-added products. In response to the second, Canada can provide technologies and expertise for AMS to strengthen their own food systems. The following sections will detail six strategies for Canadian industry, government, and other partners to seize the seize the substantial commercial opportunities available within these two roles.

Figure 9: Number of moderately or severely food insecure people in Southeast Asia (millions) (2019-2021 Average)



Source: Food and Agriculture Organization (FAO). "FAOSTAT." FAO, 2023. https://www.fao.org/faostat/en/.

Figure 8: Prevalence of moderate or severe food insecurity in the total population (2019-2021 Average)



Source: Food and Agriculture (FAO). "FAOSTAT." FAO, 2023. https://www.fao.org/faostat/en/.

Challenges to Canada-ASEAN Trade

INCOMPLETE MARKET ACCESS

Experts who testified in the House of Commons 2022 study on Trade Opportunities in the Indo-Pacific report a variety of challenges to agri-food trade with ASEAN. The first is incomplete market access, which some argue is the greatest challenge to overcome. Market access refers to elimination of substantially all tariffs through a FTA. Canada has market access to four AMS (i.e., Malaysia, Vietnam, Singapore, and Brunei, upon its ratification) thanks to the CPTPP. Negotiations towards a Canada-ASEAN FTA and Canada-Indonesia CEPA are underway, which all interviewees welcomed as a positive signal. However, experts cautioned, market access will be necessary, but not sufficient to boost trade for three reasons.

The first reason is time. According to one expert, the Canada-ASEAN FTA could take up to ten years to negotiate. Due to the considerable variation between ASEAN members' levels of GDP and dependence on trade, countries have differing trade policies and ambition in negotiating an FTA.[25] The EU's failure to negotiate an FTA with ASEAN demonstrates the difficulty of reaching agreement on issues such as climate change, intellectual property, and labour standards, which Canada will be seeking through its Inclusive Approach to Trade.[26] Following the breakdown of negotiations, the EU has been forging bilateral FTAs with ASEAN members, which could serve as a template if the EU-ASEAN FTA is ever revived. While Canada's negotiations may benefit from the template provided by a Canada-Indonesia CEPA, should it be concluded sooner, and the CPTPP, Canada's multilateral approach may take much longer than the EU's bilateral approach.

The second reason is implementation. Work by the Asian Trade Centre demonstrates that capacity-building programs under the Australia-ASEAN-New Zealand FTA (AANZFTA) Economic Cooperation Support Programme (AECSP) have been important to implementation. These programs have "deepened economic integration between AANZFTA Parties" and "contributed to building institutional and technical capacities for future FTA negotiation and implementation."[27] For example, the ASEAN Regional Diagnostic Network Project helped reduce phytosanitary impediments to trade by improving AMS' pest detection capacities through diagnostic training, technologies, and networks.[28] Alongside capacity-building programs, experts argue that "there should be mechanisms for co-operation among trading partners on regulatory standards and approval processes" such as working groups and committees on SPS and technical barriers to trade (TBTs).[29]

The third reason is utilization. While Canada has 15 FTAs in force with 51 countries,[30] it often takes several years for Canadian firms, especially small and medium enterprises, to take advantage of tariff preferences following an FTA's ratification. For example, the preference utilization rate of the Canada-European Union Comprehensive Economic and Trade Agreement (CETA) stood at just 52% during its first year in effect in 2018 and has grown to 65.4% by 2021.[31] Assuming negotiations and implementation are successful, utilization by industry will also take time and concerted efforts on the part of the public and private sectors.

Advancing Market Access

None of these reasons diminish the importance of negotiating, implementing, and utilizing market access. As the Canada-ASEAN FTA and Canada-Indonesia CEPA are negotiated, the Trade Commissioner Service (TCS) and Canadian agri-food industry associations can continue promoting utilization of the CPTPP to agri-food businesses, capitalizing on preferential market access to three (four upon Brunei's ratification) AMS. Meanwhile, Canadian trade negotiators can begin to anticipate SPS provisions within the two FTAs that will require capacity-building implementation.

Even in the absence of an FTA with ASEAN, interviewees report several other challenges. First, especially in AMS with lower GDP per capita, consumers are highly price sensitive and given an abundance of substitutes in the region for agricultural commodities, the market is highly competitive. Canada's geographic distance from Southeast Asia, experts noted, compounds this challenge by increasing the costs of transportation. Second, interviewees report that it is challenging to identify local buyers and distribution partners, which creates onerous up-front costs that may, from an exporter's perspective, outweigh the potential long-term rewards. These challenges are significant, but according to some industry groups in Canada, non-tariff barriers (NTBs) are the most significant challenge.[32]

NON-TARIFF BARRIERS

While it is legal and often necessary for governments to regulate the health and safety of agri-food imports using non-tariff measures (NTMs), interviewees emphasized that a number of AMS apply these regulations in unscientific ways that violate WTO commitments and regional trade agreements.

One expert noted that while protecting domestic producers is one motivation for AMS to create and maintain NTBs, food security is another significant driver of decision-making. Even if imports may offer cheaper alternatives for consumers, most countries, including wealthy ones, view domestic food security as too important an objective to leave entirely open to market forces. As AMS have liberalized, they have substituted NTBs for tariffs to achieve these objectives. Although there have been efforts by the ASEAN Secretariat to track and eliminate NTBs such as the ASEAN Trade Repository,[34] progress has been elusive in part because smallholder farmers are an important political constituency.

Interviewees offered diverging perspectives on the most effective approach towards NTBs. For its part, Canadian agri-food industry associations have made clear in a 2022 report and testimony to the House of Commons Standing Committee on International Trade (CIIT) that science-based advocacy is essential, and that this requires greater representation of Canadian public and private trade experts on the ground in AMS.[35] This reasoning has been compelling and is reflected in the Indo-Pacific Strategy's (IPS) commitment to establish an Indo-Pacific Agriculture and Agri-Food Office (IPAAO).

Several experts cautioned that not all science-based advocacy is equally effective. One expert stressed that a subtle approach, working cooperatively with regulators rather than lecturing them, has been much more effective in Southeast Asia's cultural context. The most effective advocacy, the expert argued, is done using risk communication techniques, a "science-based approach for communicating effectively in high concern, low trust, sensitive, or controversial situations."[36] Regulatory, technical, and trade personnel at the IPAAO would benefit from training in these techniques.

When do Non-Tariff Barriers Arise?

A report by the Asian Trade Centre, explains that non-tariff barriers (NTBs) arise when NTMs are:

- enacted specifically to discriminate against imports or foreign firms with the singular purpose of protecting the domestic industry,
- not applied homogeneously across trading partners, or
- include unjustified application of Sanitary and Phytosanitary (SPS) measures and other technical barriers to trade (TBTs).[33]

Some interviewees placed greater emphasis on compliance than advocacy, observing that countries, including Australia and EU members, are adept at navigating barriers and finding loopholes, as a result of decades and even centuries of experience trading in these markets. This historical perspective resonates with another expert's observation that more interdependent two countries' trading interests are, the less incentive there is for one to impose and maintain NTBs, and vice versa. This would suggest that the stronger a trading partner's ties are to an AMS, the less likely it is to experience the friction that NTBs generate.

Taken together, interviewees spoke about addressing NTBs at three levels. First, industry associations and relevant federal and provincial line departments should work at the operational level, strengthening representation and advocacy on the ground and assisting companies with compliance. The new IPAAO provides an excellent opportunity to advance these efforts. Second, trade negotiators should identify mechanisms such as capacity-building programs and committees on SPS and agriculture within the Canada-ASEAN FTA that will allow parties to discuss and resolve NTBs. Third, government and industry should work at the strategic level to articulate a greater role for Canada that responds directly to ASEAN's interests while capitalizing on Canada's unique strengths in agri-food. As existing and new initiatives announced in the IPS advance the first and second lines of action, the following sections will recommend strategies for Canada to realize the third line of action.

Canada's Engagement with ASEAN

Experts consistently express that Canada is playing catch-up in the Indo-Pacific region across a number of policy areas. Canada's engagement in ASEAN's agriculture and agri-food sector, according to the experts consulted for this report, is no different.

Interviewees in Canada and ASEAN enumerated numerous strengths that Canada possesses in agriculture and agri-food that, they observe, have been underutilized in Canada's engagement to date. These strengths include world-class expertise in agtech, biotech, plant science, and sustainability, as well as food safety, utilization, authenticity, point of origin, and nutrient-dense products. Canada's strengths span across its public sector, private sector, and civil society with reputable agri-food technical expertise housed within all orders of government, universities, start-ups, and industry associations. Interviewees observed that, with some notable exceptions, two-way ties between Canada and Southeast Asia remain relatively weak. For instance, there are few academic partnerships between universities, Canadian companies engaging in foreign direct investment (FDI), or ASEAN investors considering Canadian start-ups.

The Government of Canada has increasingly placed a strong emphasis on building and strengthening existing people-to-people ties as part of the IPS through scholarships, civil society organizations, travel, and immigration. The Strategy also boosts trade engagement and diplomatic representation through the Canadian Trade Gateway in Southeast Asia (Trade Gateway), a new IPAAO (CAD 31.8M) and provides substantial funding for sustainable infrastructure through FinDev Canada (CAD 750M over three years).[37] Interviewees welcomed these initiatives as major steps in the right direction but observed a lack of strategic coherence around agri-food. While agri-food is one among many of the Strategy's priorities, there are significant opportunities on the table given the sector's economic importance to Canada and the high priority that ASEAN has placed on food security. The following sections will analyze Canada's engagement across market development, applied research collaboration, and international development.

MARKET DEVELOPMENT

Strengths and Weaknesses of Canadian Market Development

Market development, in this context, refers to a set of activities that companies, industry associations, and government trade personnel engage in to connect buyers with sellers in a new market. For the purposes of this report, this term is distinct from the related set of activities required to secure market access through FTAs. Interviewees repeatedly attributed much of Canada's underperformance in trade to weak market development relative to competitors including Australia, the US, and EU members, which are much more active in promoting their products.

For instance, one interviewee noted that at Food and Hotel Asia 2022, the flagship agri-food trade show in the region, there were few Canadian presenters on the agenda compared to numerous Australian, American, and European ones. Other interviewees, however, had more favorable impressions of Canadian market development. In particular, experts from a variety of other trading partners from around the world at Food and Hotel Vietnam reported that they were impressed with Canada's strong and growing presence at trade shows. These diverging perceptions likely reflect the acceleration of trade initiatives in recent years as policymakers' and firms' attention have turned from an increasingly fraught economic relationship with China and the US to other opportunities.

While Canada has long-standing trade and diplomatic ties with some ASEAN countries, interviewees emphasized that it is perfectly rational to diversify first to European, Chinese, and North Asian markets, with which Canada has stronger trade networks, experience, and tariff preferences compared to Southeast Asia. This disjuncture between the long-term opportunity that will benefit Canada's economy as a whole and the disincentivizes that exporters face in the short term is a classic market failure that both orders of government have the tools to address. While Canada's trade diversification is a vexing problem that will not be solved overnight, interviewees highlighted notable strengths and success stories to build on.

For example, interviewees from the Canadian private sector emphasized that funding programs from the federal and provincial governments for attending trade shows were crucial and reported that they would not have attended otherwise. Trade shows facilitate the necessary connections between Canadian exporters and ASEAN buyers, importers, and distributors. These connections are essential to accessing local knowledge and navigating regulatory and language barriers.[38] Private sector interviewees unanimously praised these programs and encouraged their expansion, a recommendation reflected in the IPS' expansion of Team Canada trade missions (CAD 45M over five years) and the CanExport Program (CAD 37.7M over five years).[39]

Several interviewees praised Export Development Canada (EDC) as active, effective, and efficient in providing funding, crediting its ability as a Crown Corporation to engage in transactions independently of its counterparts in Ottawa. One expert also highlighted the tight relationship between Canadian embassies and their commercial arm, the TCS, which sets Canada apart from competitors. Interviewees welcomed the announcement of the Trade Gateway and IPAAO in the IPS, but cautioned that their effectiveness will hinge on their design and implementation, about which there are few details at the time of writing this report.

Competing on Value-Added Products

Experts emphasized that Canada's market development strategy in Southeast Asia should not rely entirely on selling more commodities because structural factors (namely geographic distance) make it difficult to compete on price with AMS' established trading partners. Instead, interviewees spoke about going where it is less crowded by focusing on high value-added and premium products. Indeed, this is the strategy for many Canadian products including maple syrup, fresh fruit, and high-end meats. In a highly competitive, price-sensitive, and geographically remote market, Canadian agri-food companies should develop and export new value-added products to increase the overall value of Canada's exports to ASEAN. Companies should focus on developing value-added products that cater to regional tastes and preferences and leverage unique Canadian ingredients. For example, noodles using Canadian purple wheat, which was developed through a collaboration between the University of Guelph, industry, and government, are popular in Southeast Asia.[41]

Definition of a Value-Added Product

A value-added product is defined as when:

- The physical state or form of a product has been changed.
- The product increases in valued due how it is produced.
- Separating an agricultural commodity or product which creates an increase in value of that commodity or product.[40]

Value-added products also present an opportunity for collaboration with AMS processing and manufacturing industries, where Canadian exporters can provide agri-food inputs to value-added goods. For example, Canada is a leading global producer in pulses,[42] which are excellent inputs for manufacturing plant-based proteins.[43] As demand for alternative proteins sources grows across AMS, selling to and investing in local processing companies will help Canada capture a niche market.

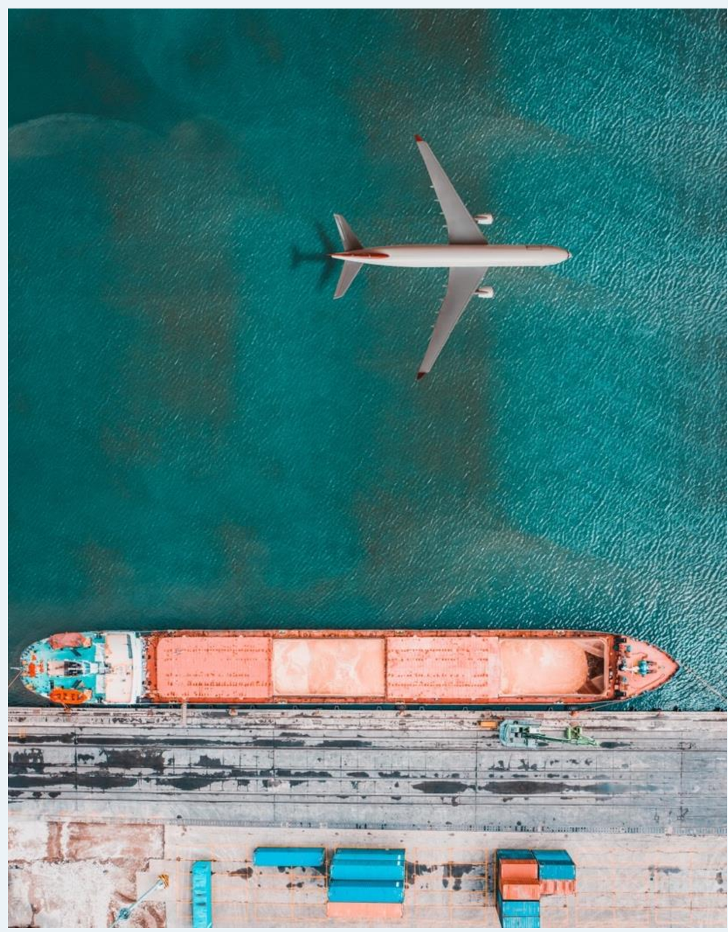
As a wealthy nation with a world-leading technology and start-up ecosystem, scientific regulatory regime, and a highly liberalized economy, Singapore is the natural point of entry for many companies to Southeast Asia. Obtaining regulatory approval and connecting with local partners in Singapore serves companies well to then expand to neighboring AMS. However, interviewees noted, Singapore's population is a small fraction of all AMS, and its agri-food market is highly competitive and small in comparison. Interviewees encouraged firms and policymakers to place a high priority on emerging economies with vibrant agriculture and agri-food sectors such as Vietnam and Thailand. While entering these markets is more challenging due to the presence of NTBs, the long-term opportunities for growth across value-added agri-food goods and agtech are substantial.

Interviewees emphasized that policy should encourage agri-food companies to develop, market, and export value-added products for Southeast Asian tastes and preferences. Alongside four other key priorities, the Guelph Statement, a vision for Canada's agriculture sector developed by the federal, provincial, and territorial governments, aims to "[build] sector capacity and growth through realizing the potential of value added agri-food and agri-products."[44] These priorities are to be implemented through the Sustainable Canadian Agricultural Partnership (Sustainable CAP), a suite of programs supported by CAD 3.5B in funding over five years (2023-2028).[45] This report will advance recommendations that capitalize on these programs to help Canadians exporters compete on value-added products in ASEAN.

Expanding Two-way Commercial Ties

Several interviewees made the case that Canada should think strategically and long-term about two-way commercial ties. The stronger the economic links are between exporters, importers, investors, start-ups, and other players in the value chain in both directions, they reasoned, the faster ASEAN's economy and its trade with Canada will grow. Taking a narrow view of selling more to ASEAN without offering anything of value in return, they cautioned, will not serve Canada's long-term economic interests.

The first area of opportunity for strengthening bilateral ties is to encourage investments into Canada. While big players such as Singapore's Temasek may not look at Canada due to an abundance of options in other jurisdictions, experts emphasized that there is a vibrant landscape of corporate agri-food players in Vietnam and Thailand that Canadian agtech and biotech start-ups should have on their radars such as C.P. Group and Thai Union. It is encouraging that the Trade Gateway announced in the IPS will seek to "enhance Canada's profile as a commercial and investment partner" and "[attract] foreign investment to Canada." Interviewees noted that investment attraction is one area where provinces are playing an active role, a strength that federal initiatives like the Trade Gateway and the Invest in Canada



agency should seek to leverage. An excellent case study to build on is Agrocorp, a Singapore-based agri-business company that has made several investments in processing facilities in Canada beginning in 2009 and is leveraging Canada's strengths in high-quality and safe agricultural commodities.[46] Advocacy groups including Canadian Chambers of Commerce (CanChams) in ASEAN, the CABC, and industry associations also have an important role to play in building these connections through events, networking, and programming.

A crucial factor in enabling greater market development is the ability to meet increased demand from new markets reliably. Several interviewees noted that Canada's domestic trade infrastructure, including roads, railways, and ports, are significant constraints on expanding trade. While Australia exports from numerous large ports spread out throughout the country, Canada's large ports are limited and scattered in comparison, requiring significant trade enabling infrastructure (i.e. roads, railways, etc.) to connect agri-food exporters across the country to ports. Given BC's proximity to Asia, the Vancouver and Prince Rupert ports are crucial for moving products to the ASEAN market. However, the Vancouver port is increasingly at capacity, which has jeopardized Canada's reputation of being a reliable trade partner. Experts cited that investment in trade enabling infrastructure and increasing capacity in BC ports are crucial for building confidence with trade partners and increase trade revenues. To Canada's credit, the IPS outlined Canada's plan to contribute to the National Trade Corridors Fund, to upgrade domestic transportation infrastructure, including ports of Vancouver and Prince Rupert. Further, the federal government is in the process of assessing the Roberts Bank Terminal 2 project, which would increase container shipment capacity, in turn generating an additional CAD 3B in GDP per year and creating tens of thousands of jobs[47].

The second area of opportunity is for Canadian firms, industry associations, and trade officials to launch strategic trade promotion initiatives that create value for ASEAN customers and partners. With the caveat that the US economy is ten times larger than Canada's, US Soy and the US Dairy Export Council has established centres of excellence in Southeast Asia from which Canada can learn. The Asia Soy Excellence Center which offers workforce training to employees in the animal[48] and food protein[49] industries. It does so in partnership with Kansas State University, American agri-food companies, and technical experts in academia and the private sector based in AMS. Funded by American dairy farmers and processors, the US Center for Dairy Excellence is a state-of-the-art facility in Singapore that provides ASEAN-based customers with programming, market research, and product demonstrations.[50]

These centres of excellence draw on American strengths and build links between firms, professionals, and buyers in the two regions, illustrating how the Trade Gateway and IPAAO could expand two-way commercial ties. As Canada's IPS commits to boosting commercial demonstration of Canadian clean technology products, a parallel initiative could be launched for agricultural technologies that create value for ASEAN customers and partners. For example, Canadian company XpertSea uses computer vision, machine learning, and artificial intelligence to optimize shrimp aquaculture.[51] As one of the most carbon-efficient farmed animal proteins available, technologies that boost efficiency and sustainability have significant potential in the ASEAN market. These initiatives require collaboration between government and industry to identify regional and sectoral niches, as well financial resources, and technical expertise.

APPLIED RESEARCH COLLABORATION

Beyond selling commodities, Canada has significant research and development (R&D) and scientific capacity related to agriculture and agri-food. Interviewees consistently spoke to Canada's strengths in the agtech, biotech, plant science and agricultural innovation space, citing the Global Institute for Food Security and Protein Industries Canada as examples. This is particularly relevant in the context of engaging with AMS. Mounting concerns and implications of climate change, combined with a growing population and changes in dietary preferences will put pressure on AMS' governments to look externally for food needs and support. Interviewees cited that these strengths are not being widely leveraged in Canada's engagement with ASEAN to date, where R&D initiatives and partnerships have historically been limited.

Forging Applied Research Partnerships

Experts pointed to the importance of moving beyond economic ties to strengthen and diversify trade. Partnerships between government, industry, universities, non-governmental organizations (NGOs), and research institutes are a crucial means of doing this, as they signal commitment to working with ASEAN. Several interviewees highlighted the importance of investment, where investment signals that partners see value in working with the region and this value is backed up with financial resources. Establishing research centres in AMS and forging partnerships with academic and R&D institutions signals commitment by establishing a physical presence in the region. Collaborative applied research initiatives, with involvement of the Canadian agri-food private sector, were cited by several interviewees as being highly effective and beneficial, as they ensure implementation of research outcomes and medium to long-term investment in the region.

Experts cited several benefits to establishing applied research partnerships in the region. First, through these partnerships, partners acquire a good understanding of the market and Southeast Asian consumer demand and needs. Second, these partnerships ensure alignment between demand, innovation, and technology, which was highlighted as crucial to building long-term partnerships with ASEAN stakeholders. Finally, they actively contribute to AMS' agriculture and agri-food sector by providing context-specific solutions to AMS' food insecurity challenges. Interviewees stressed that context-specific solutions are essential in the context of ASEAN's member states diversity.

The IPS commits CAD 61.1M over five years to expanding the Canadian International Innovation Program (CIIP), a program that supports Canadian companies in pursuing international R&D collaboration with a foreign partner. While Singapore has been identified as one of the countries in which to establish new partnerships, other AMS have not been included in this initiative. Several interviewees emphasized that other AMS, including Indonesia, Malaysia, Thailand, and Vietnam, have vibrant and growing agtech innovation ecosystems and offer excellent opportunities for Canada to forge applied research partnerships.

In service of ASEAN's objective to increase economic integration, Canada contributes to the Canada-ASEAN Plan of Action Trust Fund, a regional cooperation program that supports shared priorities and complements bilateral development assistance.[52] Food and agriculture are among the shared priorities defined within the 2021-25 Action Plan, as well as R&D, agri-food innovation, and agtech. Canada and ASEAN can jointly leverage this mechanism to strengthen applied research collaboration, drawing on the additional CAD 13.1M committed to the fund in the IPS.[53]

Experts spoke of opportunities in British Columbia specifically, given its relative proximity to Southeast Asia. For example, Simon Fraser University's new B.C. Centre for Agritech Innovation, which connects businesses in the agtech sector with academic, public sector and industry partners to develop solutions related to food security, climate change, and resilient supply chains.[54] Given the rising food security needs of AMS, several experts expressed that the new Centre should include ASEAN businesses and bodies in its network to connect Canadian SMEs, exporters, and agtech companies to new markets. Further, experts emphasized that it should be a priority for the provincial and federal government to connect Canadian start-ups with ASEAN investors, by inviting delegations from ASEAN to Canada. This would allow ASEAN investors to engage with Canada's domestic tech ecosystem and players, including agtech.

The Netherlands was consistently brought up as a prime example within the context of building applied research and agri-food programs in AMS. Several Dutch universities have a presence in Southeast Asia, either through innovation centres or knowledge exchanges. For example, Wageningen University and Research (WUR) has established partnerships with Nanyang Technological University (NTU) and Agency for Science, Technology and Research (A*STAR) in Singapore, where WUR and NTU offer a joint program in Food Science and Technology and WUR and A*STAR are conducting joint research on alternative proteins.[55] These types of initiatives help foster knowledge exchange between countries and can lead to further applied research programs and collaborations. In turn, these partnerships strengthen bilateral relationships and diplomatic ties, which ultimately lead to positive trade outcomes as well. Canadian research institutes and innovation centres, such as the Saskatchewan Food Industry Development Centre,[56] would do well to look to Southeast Asia and establish partnerships in ASEAN.

Leveraging Canada's Food Safety and Regulatory Environment

Interviewees in both Canada and AMS highlighted Canada's food safety as a key strength. Canadian agri-food products were described as safe and trusted, which was attributed to food safety practices that are unique to Canada. An expert at the January 2023 Canadian Agri-Food in a Hungry World conference spoke of several examples, including how Canada can produce low residue grains, given the cold temperatures in the prairies, and can raise Pork without antibiotics. Further, the Canada Food Inspection Agency (CFIA) was often described as reputable, respected, and well-recognized globally. Interviewees emphasized that this translates well in ASEAN markets where AMS' industry endorses and trusts products approved by CFIA, and consumers widely recognize Canadian products as safe.

Experts pointed to food safety issues across AMS as an opportunity for Canada, given its expertise. Specifically, Southeast Asia faces significant food fraud and authenticity (i.e. mislabelling, substituting, diluting, etc.[57]), cross-contamination, and food hygiene concerns. These issues can result in mistrust of ASEAN products and AMS trading partners, directly impacting trading outcomes. In the context of agri-food, especially in certain industries like meat, this is particularly alarming as it can lead to food-borne illnesses and outbreaks. Canadian agri-food companies' testing, traceability, and preservation practices and technology were all cited as areas that would be incredibility useful to build capacity domestically and improve food safety standards in AMS. As outlined in the Joint ASEAN-Canada Plan of Action, developing technologies, best practices, and management systems to ensure food safety[58] is a key priority in the context of strengthening cooperation between ASEAN and Canada.

Food safety concerns can also impact Canadian exporters, leading to the implementation of NTBs, or delays and shipment holds by ASEAN importers and regulators. This can result in whole shipments going to waste and exporters can lose millions. Interviewees emphasized that it is important to have relationships in place with ASEAN regulators and importers before these types of issues arise, in order mitigate delays quickly and effectively. Interviewees highlighted opportunities for Canada, specifically CFIA, to work closely with AMS regulators and importers and provide trainings on Canadian food safety processes and regulations. This would help provide context on the Canadian agriculture and agri-food sector and rationale behind our standards. The new IPAAO would do well to include food safety experts and specific agri-food specialists, to ensure that the new office is able to provide market specific expertise to Canadian agri-food companies exporting to the region. This expertise on the ground would help build relationships with ASEAN importers and help mitigate any issues, such as re-sealing shipments.

While food safety was largely described as a strength, experts also point to domestic regulations that are cumbersome for Canadian agri-food companies and stifle plant science and agri-food innovation and competition. These regulations processes were cited as creating bottlenecks in Canadian R&D, limiting its ability to grow and create new products. Some experts noted that Canadian companies have been moving their research centres to other countries, such as Australia and the United States, where the regulations are more conducive for innovation. Timely and efficient approvals and permits are essential in the context of plant science and innovation, as it could make or break getting a product out on the market before competitors, attracts business and investment, and encourages innovation.

Case Study: The Netherlands

Though a relatively small but densely populated country of 17.5 million people and a GDP of USD 63,419 per capita[59], the Netherlands is the second biggest food exporter globally after the US.[60] In 2020, the Netherlands exported roughly USD 1.4 million[61] in agriculture and agri-food products to AMS, representing an important agri-food partner for the region. Interviewees described the Netherlands as having a strong and consistent narrative on their strengths in agri-food and the Dutch brand, which has resonated well with consumers and governments across Southeast Asia.

The Netherlands has a world-renowned agtech and agri-food innovation sector[62], as it invests significantly both domestically and internationally to develop new solutions to feed growing global food demand sustainably. For example, the Dutch have worked closely with Singapore to help meet its “30 by 30” initiative, which aims to increase its “agri-food industry’s capacity and capability to produce 30% of nutritional needs locally and sustainably by 2030.”[63]

To help meet this objective, Enterprise Singapore, a government agency supporting Singaporean enterprise development[64], partnered with Food Valley Netherlands (Food Valley NL) to identify alternative protein solutions, including the role of insects,[65] and the state of the protein shift in Singapore and Netherlands.[66] Food Valley NL is an international R&D organization based out of the Netherlands that is working to develop new solutions to transform the food system to be more sustainable and resilient as demand for healthy and nutritious foods rises in the coming decades[67]. Several interviewees stated that Food Valley NL is an ideal example of a successful agtech partnership with an AMS.

This type of initiative illustrates Netherland’s more relationship-centric approach, emphasizing the importance of being a partner to ASEAN and its member states beyond exports. This active and integrated presence in the region in turn ensures that the Dutch have a better understanding of the regulations and processes in place. Further, experts consulted consistently emphasized how important relationships are in the context of agri-food trade, as they help exporters navigate trade-related issues quickly and efficiently.

Emerging economies such as Indonesia, Malaysia, Thailand, and Vietnam, will have increased need for agtech and innovation as weather patterns become increasingly variable and extreme weather events more common due to climate change. The success the Netherlands in Singapore with its own R&D initiatives signals an important opportunity for Canada to become more active in these emerging economies before they become too crowded.

INTERNATIONAL DEVELOPMENT

ASEAN's Development Priorities

Interviewees stressed the importance of economic development outcomes in international development initiatives for AMS, emphasizing that these types of initiatives are widely well received. Experts observed that AMS do not make a strict separation between 'development' and 'commercial' outcomes, in part because economic development is a central priority in the context of development for ASEAN.

In the context of food security, experts indicated that AMS view this issue as a systemic challenge that cannot be understood in isolation as a strictly 'development' or 'commercial' issue. To truly be a food security partner to ASEAN, experts stressed that partner countries need to marshal and align all facets of their engagement, including commercial, development, humanitarian, people-to-people ties, diplomatic representation, and more. To Canada's credit, Minister Sajjan highlighted in a February 2023 GAC town hall the importance of looking at food security from a wider lens than just food production[68]. However, interviewees emphasized that while Canada has made some progress in this area, there remains opportunities to strengthen alignment.

Canada's Development Assistance to ASEAN Member States

Interviewees consistently emphasized the importance of international development in the context of agri-food trade. Specifically, interviewees cited the role of international development in forging and strengthening partnerships with AMS and signaling Canada's commitment to being present in the region. Canada uses the Feminist International Assistance Policy (FIAP) to guide its international assistance, which centres the empowerment women and girls and gender equality in its development initiatives.[69]

As of February 2023, there were a total of nine active agriculture-related Canadian bilateral development projects in Southeast Asia (e.g. Cambodia, Indonesia, Laos, Myanmar, Philippines and Vietnam), worth roughly CAD 1.56B in contributions.[70] Of these nine projects, only one (i.e. Improving Food Safety for Economic Growth in Vietnam, SAFEGRO, implemented by Alinea International Ltd.) was related to increasing ASEAN agri-food trade capacity. SAFEGRO aims to "improve food safety regulation and enforcement in Vietnam, increase competitiveness of poor farmers and other actors supplying safe agri-food products, and increase consumer demand for safe and affordable agri-food." Although there are not any direct trade outcomes, there are several indirect trade benefits. The project builds domestic capacity in Vietnam by leveraging Canadian food safety expertise and standards, which ultimately can translate into greater Canada-Vietnam trade given that Canadian food safety standards would be met and understood by Vietnamese farmers and producers.

As part of the IPS, Canada has stated its commitment to increasing development assistance in the Southeast Asia region. Specifically, Canada has announced the Feminist International Assistance Responsive Bilateral Programming (CAD 100M over five years), which aims to respond to the needs of the region and be a key partner to advance the United Nations' Sustainable Development Goals[71]. One of the focus areas will be supporting economic growth that works for everyone, including initiatives related to sustainable agriculture.

Canada can also leverage the Canada-ASEAN Plan of Action for development initiatives. The Plan of Action specifies strengthening cooperation between AMS and Canada on food security and nutrition, particularly related to trade and investment promotion, capacity building and sharing of best practices[72]. This mechanism could be especially beneficial to increase regional development initiatives, which several experts emphasized is crucial to support ASEAN's objective of economic integration.

Utilizing the Development-Trade Nexus

Several interviewees stated that there is rarely crossover between Canadian development and trade initiatives. Interviewees iterated that there is interdepartmental collaboration between development and trade teams, yet funding and initiatives often remain siloed. Fundamentally, experts explained that the mandate for Canada's trade teams varies significantly from development outcomes. Australia may be taken as an example, as it capitalizes on the inherent linkages between trade and development through the ASEAN-Australia Development Cooperation program (AADCP), a cooperation arrangement that is explored below. Importantly, this approach does not come at the expense of values-driven development objectives; rather, it ensures that development and commercial projects are aligned where there is opportunity to advance both in tandem.

Interviewees spoke of the tension between development and trade efforts, particularly as localization (i.e. promoting local development and actors) is increasingly being discussed in the context of development. In line with international best practices, Canadian international assistance remains untied and unconditional since 2012-2013 fiscal year[73]. Minister Sajjan emphasized in a GAC town hall the importance of a development-trade nexus while cautioning against tied aid[74]. He cites the IPS as an example of how development and trade can come together: by creating jobs and generating economic development in other countries. Capacity building and technical assistance projects related to agriculture and food security (e.g. food safety, sustainability, and nutrition) through a development-trade nexus approach, were cited as an opportunity to both develop AMS' food systems and agriculture and agri-food sector, and support ASEAN's long term food security. Canadian agriculture, trade and development experts would do well to work collaboratively on these types of projects to maximize both development and trade outcomes.

Interviewees spoke of two mechanisms by which development projects can positively impact trade and commercial outcomes. First, development projects that directly boost a country's economic potential and productivity can produce positive spillover effects for trade outcomes for both the recipient and donor country. Second, development projects can indirectly generate goodwill and stronger diplomatic ties, and contribute towards fostering relationships with AMS farmers, agri-food industry, and government. In turn, these relationships and diplomatic ties can be immensely helpful in navigating trade challenges (i.e. NTBs). However, commercial outcomes should not be prioritized at the expense of development outcomes, as this would neither be ethical nor practical for sustainable development.

Case Study: Australia

Australia has a long-standing history of political, cultural, diplomatic, and economic partnerships with ASEAN and the AMS. In 2021, Australia's trade with ASEAN reached AUD 127.1B and the two-way investments for that year were valued at roughly AUD 248.7B.[75] Interviewees emphasized the importance of Australia for the region, as well as the effectiveness of the Australian Department of Foreign Affairs and Trade's (DFAT) in developing sophisticated and comprehensive development assistance that complements Australian foreign trade objectives in AMS.

One of Australia's main development programs with ASEAN is the ASEAN-Australia Development Cooperation program (AADCP) phase II (2009-2022)[76]. The program's budget is approximately AUD 57M, and it is comprised of several development projects that aim to support in achieving economic connectivity and closing development gaps in ASEAN[77]. Through this program, Australia provides expert policy advice and research and development assistance, and implementation support with the goal of supporting ASEAN in harmonizing standards, eliminating tariffs and non-tariff barriers[78]. To achieve its purposes, the AADCP II focuses on several streams that encompass connectivity, agriculture, investment, financial integration, services, and capacity building[79]. This aspect of Australian engagement is deeply valued by AMS, as it supports the economic integration goals of the ASEAN Economic Community[80].

Combined with the ASEAN-Australia-New Zealand Free Trade Agreement (AAZFTA) and the Regional Comprehensive Economic Partnership (RCEP), Australia's coherent and consistent multilateral and bilateral engagement with the region have built a strong institutional linkage among AMS and ASEAN that promotes trade and investment[81]. For example, supporting AMS in the formulation and adoption of good agricultural regulations and practices under the program's agriculture stream helps ensure food safety and facilitates trade with ASEAN by reducing NTBs[82].

Overall, the high-profile development program was successful in strengthening partnership and consequently, institutional, and economic relations with AMS[83]. Australia is currently increasing investment into ASEAN and discussing the implementation of a new development program, the Australia for ASEAN Futures Initiative, using the same partnership model as its predecessor[84]. Australia exemplifies the benefits of utilizing the development-trade nexus to advance both development priorities and trade outcomes in tandem.

Recommendations

Securing market access through the Canada-ASEAN FTA is necessary, but not sufficient for Canada to increase its agri-food exports to ASEAN. Greater engagement in market development, applied research collaboration, and international development through the lens of food security will help ensure that market access translates into growth in Canada's agri-food trade. Each area of engagement has its benefits, yet it is the combination of all four that will make Canada into a strategic and reliable food security partner for ASEAN.

Although the public sector will play a crucial role in designing effective programs and policies, strengthening trade with ASEAN and its member states will ultimately require the private sector to seize the opportunities described in this report. Close collaboration between policymakers, entrepreneurs, and other partners will be essential to overcoming challenges and unlocking the full value of Canada-ASEAN trade. Advocacy groups, including the CABC, CanChams in AMS, and industry associations, can convene public and private stakeholders to solicit input, discuss challenges, and promote new initiatives to their membership.

The following six strategies for Canadian government, industry, other partners aim to leverage Canadian agri-food strengths while responding to ASEAN's food security challenges, forming the basis of a Food Security Partnership. The recommendations aim to capitalize wherever possible on existing resources and initiatives, such as the IPAAO announced in the IPS.

The table below outlines the recommendations by strategy, including responsible stakeholders and projected timelines.

Strategy	Recommendations	Responsible	Timeline
1. Negotiate, Implement, and Utilize Market Access	**1.1** Expand promotion of the CPTPP to agriculture and agri-food businesses through on-the-ground outreach (e.g. roadshows), webinars, and sector-specific guide	**Lead:** GAC, TCS and Canadian agri-food industry associations	Medium term (2-5 years)
	1.2 Implement capacity-building programs to support SPS and agricultural provisions of the Canada-ASEAN FTA and Canada-Indonesia CEPA.	**Lead:** GAC, AAFC, and CFIA	Long term (5-10 years)
	1.3 Create cooperation mechanisms (e.g. committees and working groups) for resolution of NTBs within the Canada-ASEAN FTA and Canada-Indonesia CEPA.	**Lead:** GAC, AAFC, and CFIA **Support:** Canadian agri-food industry associations	Long term (5-10 years)
2. Compete on Value-Added Products	**2.1** Offer cost sharing incentives (e.g. 70:30) for businesses to develop value-added products tailored for tastes and preferences of markets in SEA under AAFC's 2023-28	**Lead:** AAFC and provincial agriculture Ministries	Short Term (< 2 years)

Strategy	Recommendations	Responsible	Timeline
	AgriInnovate and AgriMarketings Program.[ii]		
	2.2 Leverage the AgriInnovate and AgriMarketing programs to develop and export value-added products that cater to ASEAN tastes and preferences.	**Lead:** Canadian agri-food companies	Medium term (2-5 years)
	2.3 As part of the IPS' Modern Team Canada 3.0 Trade Missions, launch a series of trade missions dedicated to connecting Canada's value-added agri-food products and technologies with buyers and distributors in Southeast Asia.	**Lead:** GAC and AAFC **Support:** CanChams, CABC, Canadian agri-food industry associations and companies	Short Term (< 2 years)
3. Expand Two-Way Commercial Ties	**3.1** Connect ASEAN investors with Canadian agri-food start-ups and cultivate FDI prospects in agriculture through the IPS' Trade Gateway and enhanced CanExport Program.	**Lead:** TCS, CanChams, CABC **Support:** TCS, Provincial investment attraction agencies	Medium term (2-5 years)
	3.2 Capitalizing on the IPS' Canadian Trade Gateway and IPAAO, pilot a centre of excellence for product demonstrations, technical seminars, and networking with Southeast Asian customers and partners.	**Lead:** Canadian agri-food companies and industry associations **Support:** GAC, Canadian agri-food companies	Long term (5-10 years)
4. Forge Applied Research Partnerships	**4.1** Assess the viability of including additional AMS beyond Singapore (e.g. Vietnam, Thailand, or Malaysia) in the CIIP partner countries.	**Lead:** TCS **Support:** Canadian universities, agri-food research and development companies, Canadian agri-food industry associations, research institutes	Medium Term (2-5 years)
	4.2 Drawing on AAFC's AgriInnovate program, forge new applied research partnerships in AMS, particularly in Indonesia, Malaysia, Thailand, and Vietnam.	**Lead:** Canadian agri-food companies and industry associations **Support:** Canadian universities,	Medium Term (2-5 years)

[ii] These programs are part of Sustainable Canadian Agricultural Partnership (Sustainable CAP) described on page 17.

Strategy	Recommendations	Responsible	Timeline
		agri-food research and development companies, and research institutes	
5. Leverage Canada's Food Safety	**5.1** Convene a working group with Canadian agri-food industry stakeholders to examine how to reduce administrative burden of Canadian food safety and scientific regulations.	**Leads:** AAFC, CFIA and Canadian agri-food industry associations and companies **Support:** Canadian agri-food companies	Short term (< 2 years)
	5.2 Host familiarization tours to highlight for Southeast Asian importers, distributers, and regulators the integrity of Canadian agri-food standards, traceability, and products.	**Lead:** Canadian agri-food companies and industry associations	Short Term (< 2 years)
	5.3 As part of the IPAAO's activities, provide technology and trainings to AMS regulators and businesses related to food safety (e.g. food authenticity testing, traceability, and preservation).	**Lead:** AAFC and CFIA **Support:** Canadian agri-food industry associations, agri-food tech companies	Medium Term (2-5 years)
6. Utilize the Development-Trade Nexus	**6.1** Create a mechanism, such as a working group, to develop policy for implementing the development-trade nexus that leverages Canada's strengths in agri-food (e.g. food safety, technical standards, and agtech).	**Lead:** GAC **Support:** Agri-food trade experts, development experts, INGOs/NGOs	Short term (< 2 years)
	6.2 Leveraging the IPS' Feminist International Assistance Responsive Bilateral Programming, fund capacity building and technical assistance projects in AMS related to agriculture and food security (e.g. food safety, sustainability, and nutrition).	**Lead:** GAC **Support:** AMS Ministries (e.g. agriculture, trade and development), development experts, INGOs/NGOs	Medium Term (2-5 Years)
	6.3 Continue to engage regionally on cooperation programs and projects with ASEAN to advance shared Food, Agriculture and Forestry priorities outlined in the 2021-2025 Plan of Action.	**Lead:** GAC **Support:** ASEAN Secretariat, development experts, INGOs/NGOs	Medium Term (2-5 Years)

Team Description

The research team consists of four students in the Master of Public Policy and Global Affairs (MPPGA) from UBC, led by Associate Professor Kristen Hopewell. The team members are:

Oliver Boucher holds a Bachelor of Commerce in Managing for Sustainability with a minor in Political Science from McGill University. As a graduate research assistant at UBC, he has developed a strong understanding of Canada's foreign and trade policy in the Indo-Pacific. He has professional experience with Natural Resources Canada and Innovation, Science and Economic Development Canada.

Mia MacKechnie holds a Bachelor of Arts in International Development Studies with a minor in Rural and Agricultural Development from the University of Guelph. She was a research fellow for the Centre for Southeast Asia Research at the Institute of Asian Research, where she researched food systems across the region. With her professional experience, notably at GAC and in public sector management consulting, she has developed a good understanding of food systems and security, and international development.

Khanh Pham holds a Bachelor of Arts in Economics and International Relations with a specialization in International Economics and Trade from Boston University. Prior to his enrollment into the Master of Public Policy and Global Affairs at UBC, he worked with the Vietnam Chamber of Commerce and Industry to promote foreign business and investment in the ASEAN region. At UBC, he is focusing on international trade, technology innovation, and sustainability policy.

Karine Kfoury holds a Bachelor of Arts in Political Studies from the American University of Beirut. She has been working as an Immigration Legal Assistant at IMM Recruitment where she developed her understanding of Law and Immigration in Canada. She is interested in trade, immigration, and environmental policy.

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