



PRESENTATION TO JETRO

Presented on April 21, 2016

AGENDA

Welcome remarks

Michael Rublack, Head of Asia Strategy and Business Services, ONB

NB and Opportunities NB Snapshot

JP Robicheau, Assistant Vice President, Investment Attraction, ONB

NB Export, Trade & Major Projects overview, Asia, Japan

Keith Melvin, Director of Business Development – Major Exporters, ONB

Clusters in the Province: Digital Age for NB - Cybersecurity and IT

Allen Dillon, Director Cybersecurity, ONB

ONB CONNECTS VIDEO

NB PROFILE



PROFILE

- Area: 72,908 km²
- Population: 753,914 (2.14% of Canada)
- Urban Population: 53%
- Time Zone: Atlantic
- Languages: English and French (officially bilingual)
- Currency: Canadian dollar

NB SNAPSHOT

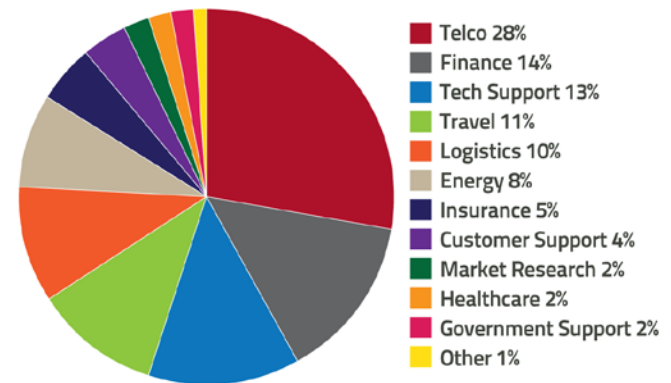
ECONOMY

- GDP (2013): 31.9 billion CAD
- GDP/capita (2013): 42,218 CAD
- GDP Growth Rate (2013): -0.6%
- Labour force (2014): 353.9 thousand

STRUCTURE

- Capital: Fredericton
- Legal system: Common Law
- Government: Democracy; provincial government under the Canadian federal government

EMPLOYEES BY INDUSTRY



CITY OF FREDERICTON



CITIES IN NB

NB is situated on the east coast of Canada, under Quebec's Gaspé Peninsula and beside the US State of Maine. It is the largest of Canada's three Maritime provinces, and its eastern boundary is entirely coastal.

In addition to its 27 towns, NB has eight major cities: Bathurst, Campbellton, Dieppe, Edmundston, and Miramichi, as well as the three largest cities, Fredericton, Moncton and Saint John.



OPPORTUNITIES NB



Top level organizational chart



2016 ONB Team

OPPORTUNITIES NB – WHAT ARE WE?

Client-focused, proactive, professional and accountable, Opportunities NB is the **first point of contact** for local and foreign businesses looking to grow, expand or locate. We are poised to:

- **Support** business development inside NB, including business support services for small, medium-sized and large businesses
- **Proactively pursue** high growth opportunities through exports and foreign investment
- **Work** with industry partners, economic development stakeholders and public sector partners to identify, build and support a portfolio of significant high growth opportunities both within and outside the province

ONB – WHAT WILL WE DO FOR YOU?

Opportunities NB is your single point of contact for exploring business location and expansion opportunities in NB, Canada.

Our **one-stop service** includes everything you need to get your business up and running. Such as:

- Personal business development executives to provide turnkey services
- Recruitment and training consultation and assistance
- Sourcing of realtors, developers, contractors, shippers and utilities
- Tailor-made financial incentive packages
- Liaison with local communities as well as federal, provincial, and municipal agencies
- Connections to local business suppliers and supply chain opportunities



NB EXPORT, TRADE & MAJOR PROJECTS OVERVIEW ASIA AND JAPAN

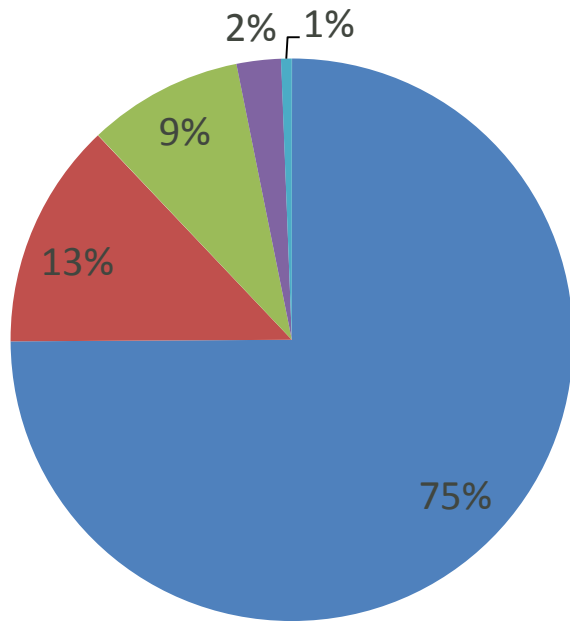
TRADE OVERVIEW: NB AND JAPAN

- NB and Japan have well established trade connections
- In 2015 NB exported \$71 million worth of merchandise to Japan, \$53.25 million of which was in seafood (around 75%)
- In the same year NB imported \$49.83 million worth of merchandise from Japan, 51% of which was in the machinery and electronics category
- With upcoming opportunities such as the TPP there is significant room for expansion in trade between NB and Japan

TRADE OVERVIEW: NB AND JAPAN

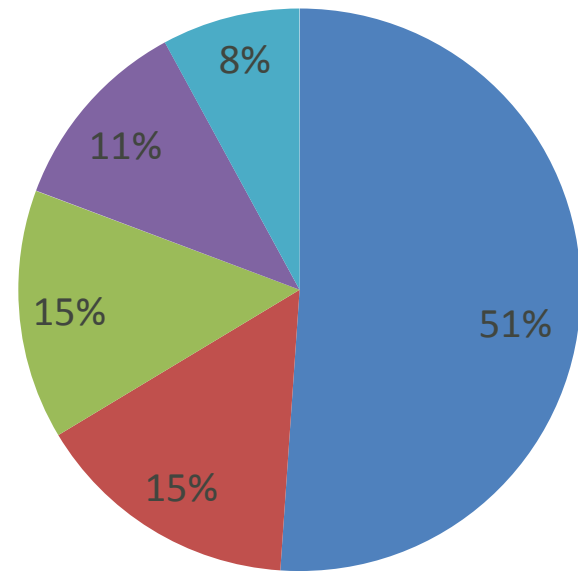
Source: Statistics Canada, Canadian International Merchandise Trade Database, 2016

NB Merchandise Trade with Japan



- Live animals and animal products (seafood)
- Prepared foodstuffs, beverages, and tobacco
- Mineral products (mostly Peat)
- Various instruments and apparatus
- Other

Japan Merchandise Trade with NB



- Machinery and Electronics
- Vehicles, aircraft, vessels and equipment
- Live animals and animal products
- Plastics and Rubber
- Other

TOP 10 TRADE IMPORTS FROM JAPAN

Mechanical Shovels and Excavators With A 360 Degrees Revolving Superstructure

Scallops - Frozen, Salted, Dried or in Brine

Other Wheeled Tractors Nes

New Pneumatic Rubber Tires - For Motor Cars (Incl. Station Wagons and Racing Cars)

Parts of Steam and Vapour Turbines

Non-Electrical Articles of Graphite or Other Carbon

Outboard Motors For Marine Propulsion

Parts of Cranes, Work-Trucks, Shovels and Other Construction Machinery

Motor Vehicles - Spark Ignition - Cylinder Capacity 1501-3000 Cc

Bulldozers and Angledozers - Track Laying

TOP 10 TRADE EXPORTS TO JAPAN

Crabs - Frozen
Lobsters, (Homarus Spp) - Frozen
Other Fish: Livers and Roes (Frozen Fish) (Excl. Fish Fillets)
Potatoes, Frozen - Prepared/Preserved Without Vinegar/Acetic Acid
Peat (Including Peat Litter) - Whether or Not Agglomerated
Percussion Musical Instruments
Lobsters - Prepared or Preserved
Flours, Meals, Pellets of Fish, Crustaceans, Molluscs or Other Aquatics, Unfit For Human Consumption
Magnetic Media, O/T Cards Incorporating A Magnetic Stripe
Crabs - Prepared or Preserved

NB COMPANIES EXPORTING TO JAPAN

While seafood makes up a large proportion of exports from NB to Japan, there are numerous success stories from diverse NB companies.

Our exporters have the necessary experience to provide smooth business transactions.

Let's explore a few NB exporters.

ATLANTIC INDUSTRIES LIMITED



Atlantic Industries Limited
We Support You.

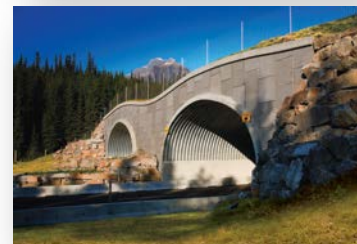
- Constructs efficient bridges
- Currently pursuing business partners in the Japanese market to distribute products
- Interested in the Japanese market for highway reconstruction and bridge replacement



Sonoma Verde Chisholm Bridge



Toronto Finch Avenue



Banff Animal Crossing

FIREADY INC

Fiready
Inc.
Kiln-Dried Firewood
Bois de foyer séché au four

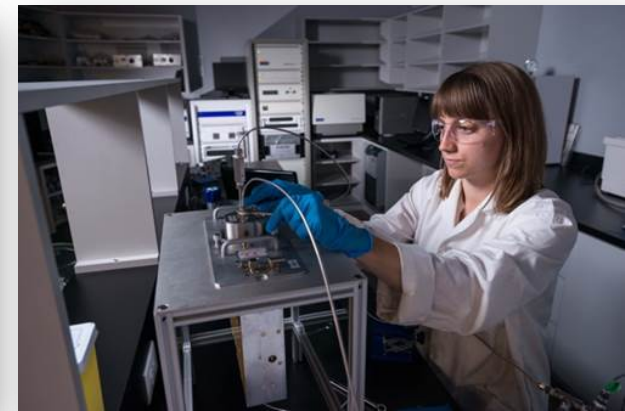
- Fiready's ATMOSPHERE™ is a certified firewood kiln which is dried and bagged without insects and is mold free
- The company has exported to Japan since 2006 via sea transit to Port Nagoya
- Ships to a distributor who sells the product primarily to a company called "METOS"



GREEN IMAGING TECHNOLOGIES



- Software and laboratory specialist in Nuclear Magnetic Resonance solutions for special core analysis in the petroleum sector
- Currently working with JOGMEC (Japan Oil, Gas, Mining and Energy Company) which has purchased some of their software and support



LOS CABOS DRUMSTICKS



- Sells drumsticks to a Japanese company which distributes musical instruments in Japan
- Currently exports via air freight



NB MAPLE SYRUP ASSOCIATION (NBMSA)


- Maple syrup products from Canada are sold to over 60 countries and demand is still growing
- NBMSA can offer personalized service to persons or businesses seeking to import maple syrup products available through its members
- Maple syrup producers in NB are interested in exploring new markets and the association can identify specific suppliers upon interest



THERIAULT & HACHEY PEAT MOSS

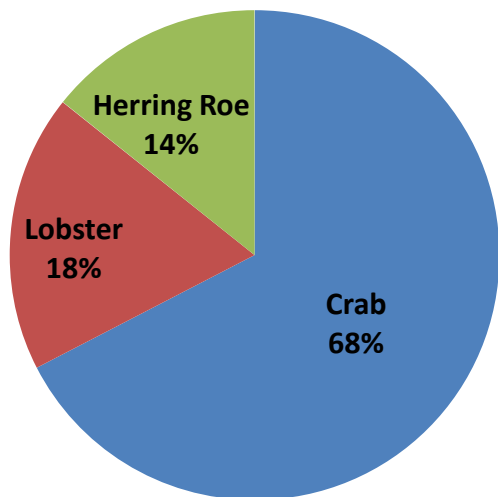
- Sphagnum peat moss supplier to the horticultural and mushroom industries
- Have been doing business in Japan since the mid 1980s
- Typically sell natural peat moss to local mixing companies
- Japan is their largest destination for shipments at 40.3% of all shipments



Large enough to meet your needs
and small enough to care. 

NB SEAFOOD EXPORTS TO JAPAN

NB Major Seafood Exports to Japan in 2015



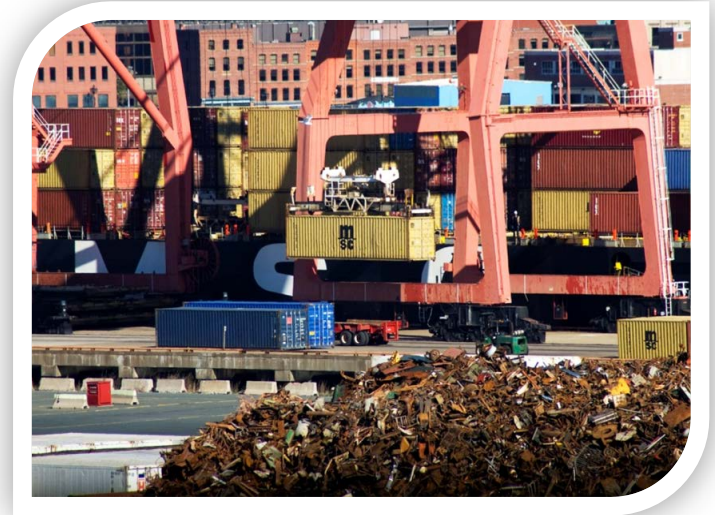
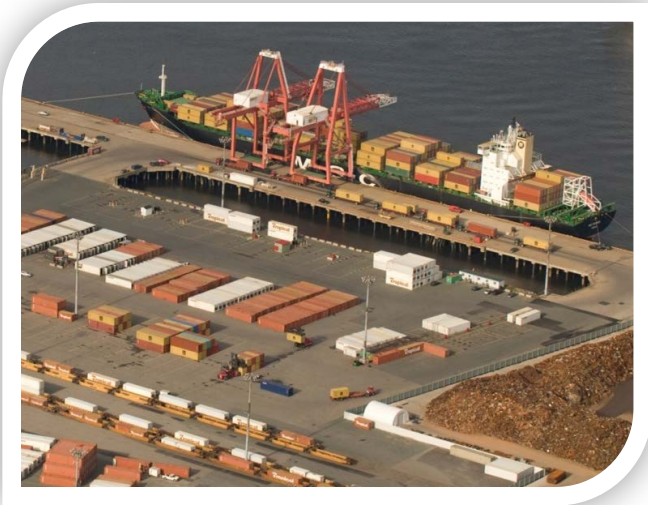
Product	2015 Export (\$ Million)
Crab	37,0
Lobster	10,1
Herring Roe	7,9
Total	55,0

Data Source: Statistics Canada & US Census Bureau

- Strong ties between NB producers and Japanese processing industry
- Generations of good relations and good business selling the world's finest seafood from NB
- NB seafood products promoted and served in Japan's finest restaurants
- Our Snow Crab from NB is appreciated for brilliant red unblemished shell and sweet flavour

PORT SAINT JOHN: CONTAINER MARINE CONNECTIVITY TO JAPAN

- Mediterranean Shipping Company is the 2nd Largest Global Container Line
- Weekly calls to Saint John, NB
- Offering Refrigerated & Dry Full Container Service



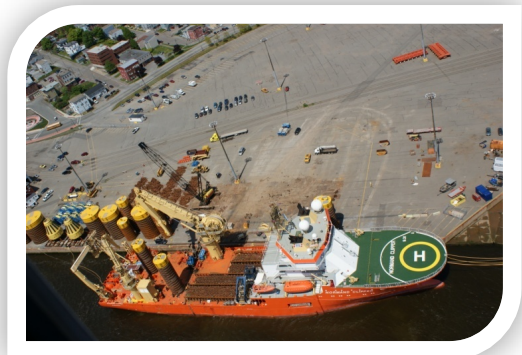
Port Saint John

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PORT SAINT JOHN: BULK AND BREAK-BULK MARINE CONNECTIVITY TO JAPAN

- Global break bulk/project cargo service on inducement



OTHER COMPANIES SEEKING OPPORTUNITIES IN JAPAN

There are numerous other NB companies interested in doing business in Japan, and ONB will help you find them.

FUTURE OPPORTUNITIES FOR JAPAN AND NB

- Japan is a vital partner in the Trans-Pacific Partnership (TPP) and the agreement will create new opportunities for trade. Reductions in tariffs on key items will help expand trade and some areas of interest are:
 - Maple syrup
 - Frozen French fries
 - Certain coniferous lumber
 - Frozen crab
 - Certain frozen herring roe
- Established trade connections between NB and Japan will remain strong and will grow
- Seafood is important (Japan sends inspectors to NB to ensure quality) but there are so many more opportunities in diverse industries

HOW CAN ONB, JETRO AND JAPANESE COMPANIES WORK TOGETHER?

- Potential multi-sector Trade Missions can create connections between Canadian and Japanese companies
- Create connections between NB companies and:
 - JETRO members, partners and contacts in Japan
- NB businesses are interested in new Japanese customers and entering Japan's "Global Value Chain" to become preferred suppliers

HOW CAN WE WORK TOGETHER?

- Facilitate communication between NB and Japan
 - Particularly around premium Canadian seafood suppliers, IT and manufactured products



DIGITAL AGE FOR NB - CYBERSECURITY AND IT

THE INTERNET IS EXPLODING

- 44 times bigger by 2020 than in 2009
- Enough data to create a stack of DVD's halfway to MARS
- Over 15B Mobile devices and the Internet of Things are fueling growth
- Driving GDP growth globally



**65% of adults worldwide
have been a victim of
cybercrime**

Allow

Deny

Norton Cybercrime Report: **The Human Impact**

PACE OF GROWTH AND
TECHNOLOGY IS CREATING
GAPS

CYBERCRIME HAS BECOME
A SILENT GLOBAL DIGITAL
EPIDEMIC

- Est. \$445B (USD) in 2015
- 70B+ CYBERSECURITY market in 2015
- 170B market by 2020

INTERNET OF THINGS AND
MOBILE DEVICES ARE WEAK
POINTS

GOVERNMENT, INDUSTRY
AND PEOPLE ARE SEEKING
SOLUTIONS

192,000 NEW IT
JOBS IN
CANADA
REQUIRED BY
2021

OVER 35% OF
JOBS ARE
INFORMATION
SECURITY AND
ASSURANCE

QUALIFIED AND
CERTIFIED
ASSETS ARE
NEEDED

2016 Cybersecurity Skills Gap

Too Many Threats

\$1 BILLION:

PERSONALLY IDENTIFIABLE INFORMATION (PII) RECORDS STOLEN IN 2014¹

97%

BELIEVE APTs REPRESENT CREDIBLE THREAT TO NATIONAL SECURITY AND ECONOMIC STABILITY²

MORE THAN

1 IN 4

ORGANIZATIONS HAVE EXPERIENCED AN APT ATTACK³

\$150 MILLION:

AVERAGE COST OF A DATA BREACH BY 2020⁴

1 IN 2

BELIEVE THE IT DEPARTMENT IS UNAWARE OF ALL OF ORGANIZATION'S INTERNET OF THINGS (IOT) DEVICES⁵

74%

BELIEVE LIKELIHOOD OF ORGANIZATION BEING HACKED THROUGH IOT DEVICES IS HIGH OR MEDIUM⁶

Too Few Professionals

2 MILLION:

GLOBAL SHORTAGE OF CYBERSECURITY PROFESSIONALS BY 2019⁷

3X

RATE OF CYBERSECURITY JOB GROWTH VS. IT JOBS OVERALL, 2010-14⁸

84%

ORGANIZATIONS BELIEVE HALF OR FEWER OF APPLICANTS FOR OPEN SECURITY JOBS ARE QUALIFIED⁹

53%

OF ORGANIZATIONS EXPERIENCE DELAYS AS LONG AS 6 MONTHS TO FIND QUALIFIED SECURITY CANDIDATES¹⁰

77%

OF WOMEN SAID THAT NO HIGH SCHOOL TEACHER OR GUIDANCE COUNSELOR MENTIONED CYBERSECURITY AS CAREER. FOR MEN, IT IS 67%.¹¹

89%

OF U.S. CONSUMERS BELIEVE IT IS IMPORTANT FOR ORGANIZATIONS TO HAVE CYBERSECURITY-CERTIFIED EMPLOYEES.^{12**}

Cyberattacks are growing,
but the talent pool of defenders
is not keeping pace.

Although attacks are growing in frequency and sophistication, the availability of sufficiently skilled cybersecurity professionals is falling behind. Cybersecurity Nexus (CSX) is addressing this gap by creating a skilled global cybersecurity workforce. From the Cybersecurity Fundamentals Certificate for university students to CSXP, the first vendor-neutral, performance-based cybersecurity certification, CSX is attracting and enabling cybersecurity professionals at every stage of their careers.

NB ECOSYSTEM

- Foundation in Security & IT – Industry and Academia
- IBM Security Division/CTO and leading security companies
- UNB Institutes and programs
- Federal and Defence initiatives
- Location/Canadian \$
- Provincial Government support



CYBER NB STRATEGY

- **SEIZE** the momentum
- A **FIRST MOVER** in Canada
- **FOCUS** on excellence in cyber-education and training
- **BUILD** and **INVEST** in our cluster
- **INNOVATE** in cyber & info security
- **CREATE** new jobs
- **ATTRACT** investment
- **PARTNER** nationally & internationally

CYBER NB PLAN



CYBERSPARK NB

- A foundational program to support the creation and continued growth of cybersecurity technologies and industry cluster
- Targeted investment and export agenda
- Access to capital
- Establish National Centre for Cybersecurity
- Host national & international events



CYBERINNOVATE NB

- CYBERInnovate NB is a new incubator dedicated to start-ups and new technology development in cybersecurity
- Home to regional, national and international industry collaboration
- Leverage in Federal Government programs
- Priority for investment attraction of new skills and companies



CYBERSMART NB

CYBERSmart NB is a focused approach to train new information security experts and accelerate workforce development via:

- Alignment of Government assets in education
- 'Boot camps'
- Develop Public/Private cyber education partnerships
- Raise awareness and capabilities in cybersecurity education



CYBERSECURE NB

- CYBERSecure NB is dedicated to securing NB systems and raising public/industry awareness
- Develop Awareness and Education Campaigns



CANADIAN INSTITUTE FOR CYBERSECURITY

- Canadian Institute for Cybersecurity is a dedicated research facility with laboratory and collaboration facilities
- Key priority for government
- Essential element in executing key research for programs Canadian programs and industry engagement





**CYBERNB
STARTS
HERE**

NB PROUD VIDEO

QUESTIONS?

THANK YOU

Opportunities NB

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