

Canada's Pivot to the Indo-Pacific: Diversifying Trade Amidst Disruption

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Executive Summary

The global trading system is currently undergoing a seismic transformation defined by escalating geopolitical rivalry, widespread uncertainty, and intensifying fragmentation. This volatile environment, marked by rising protectionism and the erosion of the multilateral order, has transformed trade diversification for Canada from a long-standing policy goal into an urgent strategic imperative for national resilience and economic security.

Historically, Canada has maintained one of the most geographically concentrated export bases in the world, leaving it vulnerable to the increasingly unpredictable trade policies of the United States (U.S.). This strategic risk was underscored in October 2025 when the U.S. abruptly terminated discussions regarding tariffs and market access, leaving significant duties on Canadian steel, aluminum, and lumber in place. As Canada explores options to strengthen its trade relations with other global powers a decisive pivot toward dynamic, fast-growing economies in Asia may be necessary in the very short term.

A Milestone in Canadian Foreign Policy: The Indo-Pacific Strategy

A central pillar of this diversification strategy is a generational shift toward the Indo-Pacific, formalized through the 2022 Indo-Pacific Strategy. This strategy aims to secure long-term prosperity by rebalancing Canada's trade toward a globally integrated East–West network encompassing half the world's population and some of the fastest-growing economies. Under this framework, Canada has committed CAD \$2.3 billion to advance trade, investment, and supply-chain resilience, with a focus on Southeast Asia and India. Significant milestones in this journey include the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), a newly signed agreement with Indonesia, and renewed momentum toward trade pacts with the Philippines, Thailand and India.

Building on Canada's Comparative Strengths

To achieve these goals, Canada is aligning its core economic strengths - including agri-food, clean technology, critical minerals, and digital services - with growing regional demand. In the agri-food sector, Canada is shifting toward higher-value premium products to serve increasingly sophisticated markets, supported by the new Indo-Pacific Agriculture and Agri-Food Office in the Philippines. Simultaneously, Canada is positioning itself as a trusted supplier of critical minerals, LNG, and hydrogen to support the global net-zero transition, leveraging strong environmental and

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social standards to build resilient supply chains. This engagement extends to the digital domain, where Canada promotes rules-based digital trade and cyber capacity while leveraging its leadership in AI and cybersecurity to protect intellectual property and strengthen regional connectivity.

Advancing Inclusive, Sustainable Trade

Central to this outward-facing shift is a commitment to inclusive and sustainable trade. Canada continues to advance women's empowerment through its Inclusive Trade Agenda, embedding gender equality and workplace flexibility into its international agreements. In addition, as climate change reshapes global commerce, Canada is aligning its trade with net-zero goals by positioning itself as a reliable supplier of low-carbon products and investing in the resilient infrastructure necessary to protect domestic trade corridors.

Bridging Interests and Impact: A Research Agenda for Engagement with the Indo-Pacific

To support these strategic interests, this white paper proposes a forward-looking research agenda built on three integrated pillars. The first focuses on economic resilience and climate adaptation, specifically identifying blended finance structures to attract private capital to green projects. The second addresses inclusive economic participation, exploring international best practices for Indigenous benefit-sharing in critical mineral projects to reduce operational risks through strong community partnerships.

The final pillar targets competitiveness through digital transformation, exploring the adoption of AI-driven, predictive border management to automate compliance and identifying digital value-addition blueprints to ensure that small and medium-sized enterprises in Canada and the region can fully capitalize on modern trade provisions. This evidence-based framework is intended to ensure that Canada's engagement across the Indo-Pacific remains sustainable, inclusive, and digitally driven.

1. Introduction

The global trading system is undergoing a seismic transformation, marked by escalating geopolitical rivalry, widespread uncertainty, and intensifying fragmentation (Kalash, 2025). This volatile environment is characterized by rising protectionism, tariff wars, and a steady erosion of the multilateral order. The Hinrich Foundation-IMD Sustainable Trade Index 2025 reveals a global economy in transition, where traditional pathways to prosperity through trade are being reshaped by mounting pressures across economic, societal, and environmental dimensions (Hinrich Foundation and IMD, 2025)²

For Canada, volatility has transformed trade diversification from an enduring policy goal into an urgent strategic imperative—essential for ensuring national resilience and economic security. The country has one of the most geographically concentrated export bases globally, with around three-quarters of its goods exports historically destined for the United States. In 2023, exports to the U.S. accounted for about 17% of Canada’s GDP and about 2.6 million Canadian jobs (Global Affairs Canada, 2024). For decades, trade between the two countries has benefited from deeply integrated supply chains that support economic activity on both sides of the border.

However, since early 2025, the U.S. seems determined to “shred the global trading order” it once fostered. While deep economic integration with the United States has yielded immense historical advantages, it simultaneously subjects Canada to significant strategic vulnerability stemming from Washington’s increasingly unpredictable trade policies and tariff threats. This was underscored when the U.S. Government abruptly terminated discussions with Canada about tariffs and market access on 23 October 2025.

The growing instability in trade relations underscores the urgency of diversifying export markets and building alternative economic partnerships to enhance resilience in an uncertain global environment. The imperative to diversify beyond the U.S. is rooted in systemic vulnerabilities created by historical reliance on a single, unpredictable partner, now compounded by a domestic productivity crisis. Furthermore, Canadian exporters face a global surge in protectionist measures driven by geopolitical fragmentation and national security concerns, particularly regarding critical supply chains. Trade friction continues to rise, with 3,388 new trade restrictions imposed worldwide in 2023 (Global Affairs Canada, 2024).

In this volatile trade environment, Canada is trying to position itself as a dependable, responsible supplier of essential resources, particularly critical minerals, to enhance economic security and reduce global reliance on concentrated sources. It has signed agreements on supply chain cooperation and energy security with Japan and the Republic of Korea. The Indo-Pacific region serves as an important source of advanced manufactured components and critical inputs for Canada. Semiconductors, specialized auto parts, and high-value electronics originate from global production hubs like Taiwan and Japan and are essential for Canada’s domestic manufacturing and innovation value chains.

² The Hinrich-IMD Sustainable Trade Index 2025 evaluates the ability of 30 global trading economies to engage sustainably in trade using a set of 72 economic, societal and environmental indicators: <https://tinyurl.com/ywwxazku>.

Resilient supply chains are vital to Canada's strategic interests, as they ensure affordability, productivity, and security. They enable firms to access global inputs, lower consumer costs, and guarantee critical service flow. Unfortunately, Canada's current supply-chain linkages expose multiple vulnerabilities, and domestic industries remain highly exposed to upstream dependencies.

Industries accounting for one-quarter of Canada's economic output are highly vulnerable to both external demand and supply shocks (Statistics Canada, 2024). More than 100 vulnerable Canadian imports have low exporter diversification, highlighting a certain level of vulnerability (Global Affairs Canada, 2021). China is the largest overseas supplier of vulnerable imports to Canada, and through its cyber program almost certainly supports espionage activities against Canadian supply chains (Communications Security Establishment Canada, 2024).

Because these dependencies reside in strategic technologies, like semiconductors and advanced electronics, and critical inputs - such as rare earths, fertilizers, chemicals and minerals needed for clean technologies - Canada must apply de-risking strategies across the Indo-Pacific. Diversification of suppliers beyond dominant ones, ramping up domestic production in key areas, and nurturing closer partnerships with trusted nations in the Indo-Pacific are necessary moves. Taking needed action will reduce bottlenecks and bolster supply chain resilience, while preserving Canadian access to critical goods.

Highly relevant to Canada's international supply chains is the domestic infrastructure and regulatory environment to support them. In this context, federal Bill C-5 received Royal Assent in June 2025. This law enacts the Free Trade and Labour Mobility in Canada Act and the Building Canada Act. The Building Canada Act streamlines approval for national interest projects, emphasizing Indigenous consultation, environmental protection, and climate goals, while ensuring timely project reviews. The Free Trade and Labour Mobility Act aims to reduce regulatory duplication, allowing goods, services, and workers to move across provinces where requirements are comparable, supporting a more integrated and efficient Canadian economy.

2. Canada's Strategic Shift Toward the Indo-Pacific

2.1 The Central Role of the IPS

Canada's response to U.S. trade volatility has combined defense, diversification, and diplomacy. To protect national interests, it has implemented calibrated counter-tariffs and reaffirmed the Canada-United States-Mexico Agreement (CUSMA) as the foundational legal and regulatory framework for Canada's most important commercial relationship. Simultaneously, Canada is boosting commercial links with non-U.S. markets while investing in critical minerals, infrastructure development, clean technology, and other strategic sectors to strengthen domestic resilience and stimulate new export opportunities. Ottawa has also been negotiating new sector-specific trade agreements with the U.S. Administration to eliminate or at least reduce U.S. tariffs and ensure market access. However, U.S.-Canada trade discussions are currently stalled, with the U.S. having abruptly terminated talks on tariffs and market access in late October 2025. Consequently, new and increasing U.S. tariffs remain in effect on key Canadian exports like steel, aluminum, copper, and lumber.

A lynchpin of Canada's ramped-up diversification efforts is a strategic re-orientation toward Asia, formalized by the Indo-Pacific Strategy (IPS). The IPS aims to ensure long-term prosperity, security, and resilience for Canada by deepening engagement with the Indo-Pacific. The strategy provides a framework to navigate a fragmented global order, helping Canada transition from a historically dominant North-South trading model to a resilient, globally integrated network with important East-West linkages. The IPS marks a generational shift in Ottawa's global economic posture. The Indo-Pacific spans more than 40 highly diverse countries, representing half the global population. Its economies range from established powerhouses (Japan, Republic of Korea, Australia) and global giants (China, India) to emerging markets in Southeast Asia. The Indo-Pacific region is Canada's second-largest regional trading partner, with annual two-way merchandise trade valued at C\$261 billion in 2024 (Global Affairs Canada, November 2025).

Defining characteristics of the region include its manufacturing prowess, high rates of economic growth, and a burgeoning middle class, expected to reach two-thirds of the world's total by 2030. This demographic shift is fueling unprecedented economic expansion, positioning the Indo-Pacific to account for 40% of global consumption and surpass the size of the U.S. economy by more than double by 2040. To deepen engagement with this rapidly growing region, the Government of Canada has, under the IPS, allocated an additional investment of CAD \$2.3 billion over five years to advance its five interconnected strategic objectives. These resources support 24 initiatives across 17 federal departments and agencies. One of the IPS's five core objectives is "Expanding Trade, Investment and Supply Chain Resilience".

2.2 Expanding Canada's Trade Footprint in the Region

The scope of Canada's trade expansion in the Indo-Pacific focuses on high-growth markets in South Asia and Southeast Asia, notably India and larger markets of the Association of Southeast Asian Nations (ASEAN). ASEAN centrality is critical to the IPS, as the 11-member bloc represents Canada's fourth-largest merchandise trading partner, and is expected to become the world's fourth largest economy by 2030.

Canada has quickened the pace of negotiating enhanced market access to the region's economies through trade agreements. The country's first trade agreement in the Indo-Pacific was negotiated with the Republic of Korea and implemented in January 2015. The Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) entered into effect in December 2018. In September 2025, Canada and Indonesia signed a bilateral Comprehensive Economic Partnership Agreement (CEPA), a comprehensive trade agreement that addresses market access for goods, services and investment, and includes provisions on small and medium sized enterprises, labour, environment and women's economic empowerment. In addition, Canada is exploring trade agreements with both the Philippines and Thailand.

The IPS recognizes India as a key partner given its growing economic, strategic, and demographic importance. On 13 October 2025, Anita Anand, Canada's Minister of Foreign Affairs, and India's Minister of External Affairs, Subrahmanyam Jaishankar affirmed trade as a cornerstone of bilateral growth between Canada and India and agreed on new cooperation initiatives. These include commencing ministerial-level discussions on bilateral trade and investment based on current economic realities and strategic priorities (Global Affairs Canada and Ministry of External Affairs,

2025). In November 2025, Prime Minister Mark Carney and Indian Prime Minister Narendra Modi agreed to launch negotiations toward a CEPA.

Canada has also worked to boost trade under the CPTPP, which brings together 10 other countries along the Pacific Rim, as well as the United Kingdom. The CPTPP is a central pillar of the economic dimension of the IPS, which prioritizes the use of the multilateral trade accord to expand commerce with Asian markets. The CPTPP is recognized for upholding open, inclusive, and rules-based trade, and setting high standards for environmental, labor, and investment. By leveraging the CPTPP, Canadian businesses gain a competitive advantage and preferential market access, including the eventual elimination of tariffs on 99% of tariff lines among member countries. In addition, the IPS supports expansion of the CPTPP through the accession of new members, an effort designed to solidify the agreement as the most comprehensive multilateral trade pact in the Indo-Pacific, which secures Canada's long-term economic interests (The Republic of Korea and other states are considering joining CPTPP).

Significantly, the CPTPP has stimulated Canadian merchandise and service trade with the agreement's seven Asian and Pacific signatories: Australia, Brunei, Japan, Malaysia, New Zealand, Singapore, and Vietnam. Between 2019 and 2023, Canada's merchandise trade with these economies grew by 38% (from around C\$48 billion in 2018 to more than C\$66 billion in 2023), primarily driven by Canadian imports of consumer goods and industrial machinery from the CPTPP's Asian members. Canada-Vietnam trade has seen the most growth, with merchandise trade increasing by 117%, largely due to the increase in Canadian imports (Asia Pacific Foundation of Canada, 2024).

2.3 Leveraging Sectoral Strengths, Partnerships and Regional Presence

Canada is strategically aligning its core sectoral strengths - such as agri-food, clean technology, critical minerals, and digital services - with regional demand. The burgeoning middle class and rapid urbanization in markets like Indonesia, Malaysia, and the Philippines are driving demand for high-value consumer products and processed foods (Bagnato, 2024). The IPS aims to significantly expand agri-food trade by targeting the Indo-Pacific, which is a rapidly expanding food-deficit consumer market with rising incomes. The IPS allocated CAD \$31.8 million for the establishment of the Indo-Pacific Agriculture and Agri-Food Office (IPAAO) in the Philippines. IPAAO aims to promote higher-value, premium Canadian products, such as specialized processed foods, high-quality beef, and plant-based proteins, thereby moving beyond raw commodities to meet the sophisticated demands of the region. The IPAAO also works to resolve non-tariff barriers (NTBs) and ensure market access.

Canada's engagement with the Indo-Pacific on clean technology is framed under the IPS strategic objective of "Building a Sustainable and Green Future." Support for clean technology dovetails with Canada's broader commitment to fighting climate change and biodiversity loss by sharing its expertise in clean technology, oceans management, energy transition, and climate finance. Central to this vision is a desire to contribute to global climate goals while strengthening partnerships across the region through innovation, investment, and collaboration. A key component of this engagement is expansion of commercial opportunities for Canadian clean technology businesses. Clean tech has been identified as a priority sector in Team Canada Trade Missions, such as the first large-scale mission to Japan, which took place in October 2023 and included more than 160

Canadian organizations. More recently, ClimateDoor Partners Inc., a Vancouver-based climate venture builder, helped lead a trade mission involving 39 companies in the cleantech and agtech sectors to Australia in February 2025 to connect Canadian companies with business partners (Campbell, 2025).

Canada is prioritizing partnerships to reduce emissions and promote clean energy. Initiatives include the Powering Past Coal Alliance, collaboration with South Korea on energy transition and climate dialogue, and promotion of its Global Carbon Pricing Challenge to share expertise on carbon pollution pricing. Infrastructure investment will also play a role, with FinDev Canada's Indo-Pacific office giving attention to the renewable energy sectors. In addition, support is being provided to SMEs to help them demonstrate and scale their technologies in priority Indo-Pacific markets. At the same time, efforts are being made to position Canada as a reliable supplier of clean energy - including critical minerals and hydrogen - essential to achieving a global net-zero transition.

This objective is reflected in agreements like the Canada–Korea Memorandum of Understanding on Cooperation in Critical Mineral Supply Chains, Clean Energy Transition, and Energy Security. It is also supported by Canada's domestic Critical Minerals Strategy and its commitment to protecting supply chains and intellectual property from foreign interference, including through the Investment Canada Act. In addition, Natural Resources Canada is deploying officers to missions in the Indo-Pacific. Bilateral cooperation is being prioritized with key partners, including Japan via a memorandum of cooperation focused on battery supply chains, all aimed at securing stable, diverse, and sustainable resource networks necessary for a clean energy future.

Canada's digital engagement with the Indo-Pacific aims at expanding trade and supply chain resilience while promoting peace and security in the digital domain. A core focus is on advancing rules-based digital trade and coherent standards across the region. This is exemplified by Canada's ongoing accession to the Digital Economy Partnership Agreement (DEPA), a novel trade pact with New Zealand, Singapore, and Chile designed to facilitate digital commerce. Canada also seeks to bolster the region's digital ecosystem by investing in digital infrastructure, including through FinDev Canada, and by promoting international interoperability, standards, and regulations that benefit the broader rules-based economy. The IPS cites the importance of enhancing cyber diplomacy and security to address the increasing threats emanating from the Indo-Pacific.

Canada is dedicating resources to actively detect and respond to malicious cyber activity that targets its businesses, critical infrastructure, and democratic processes, including foreign interference and online disinformation. It is also an active participant in regional forums such as the ASEAN Ministerial Conference on Cybersecurity and the Pacific Cyber Capacity Building and Coordination Conference. This multi-faceted approach recognizes that economic prosperity and security are intrinsically linked in the digital space. By both promoting high standards for digital trade and strengthening cyber resilience, Canada is securing its own interests while contributing to regional stability. It is also taking measures to protect its innovation and knowledge economy by safeguarding intellectual property and strengthening the Investment Canada Act against hostile investments.

Further, the Canada-India CEO Forum may reconvene on the margins of a senior-level trade mission in early 2026. It is expected that participating business executives from both countries will identify actionable recommendations for both governments to facilitate increased bilateral trade and investment, with a focus on priority sectors such as clean technology, infrastructure, agri-food, and digital innovation. In February 2026, the annual Canada in Asia Conference, held in Singapore, will be organized around the pillars of food security, energy security, and infrastructure.

3. Sectoral Opportunities for Canadian Exporters

3.1 Aligning Canadian Comparative Advantages with Indo-Pacific Demand

The IPS targets certain export sectors where Canadian expertise meets the region's massive demand. Among these priority sectors are 1) agriculture and agri-food, 2) natural resources and critical minerals, 3) clean technologies and renewable energy, and 4) information and communication technologies, including artificial intelligence (AI). This section highlights opportunities in each of these four broad areas, identifying indicative country and subregional markets, as well as actions that Canada can take to make the most of these burgeoning opportunities.

3.2 Agriculture and Agri-Food

In 2024, Canada exported tens of billions of dollars in agri-food, fish, and seafood products to Asian countries, including close to C\$5 billion in agri-food and seafood exports to Japan, and nearly C\$4 billion in canola seeds alone to China (Lincoln, 2025)³. However, as in most other areas, the U.S. remains Canada's top trading partner, receiving about 62% of all agri-food exports and providing over half of Canada's imports. China has held the position of Canada's second-largest individual agri-food and seafood export market since 2012, with Canadian exports to China increasing by 78% since that time (Agriculture and Agri-Food Canada, 2025).

Rising incomes and continued urbanization across emerging economies, notably in India, Indonesia, and Vietnam, are fueling a demand for more nutritious, protein- and vitamin-rich diets. This surging demand, however, comes as climate change threatens to reduce the region's own food production by destroying arable land. As Indo-Pacific nations seek dependable food sources, Canada's export-focused agri-food sectors are perfectly positioned to meet their growing demand and help ease food insecurity. Canadian fertilizers, pulses, and preserved and processed food products are among the agriculture products have the most export potential in the Indo-Pacific (Rozario, 2025).

Export Development Canada (EDC) has identified wheat as a top export priority, especially in countries like Indonesia, the Philippines, and Vietnam, where bakery industries are expanding (Bagnato, 2024). The Philippines alone imports over \$3 billion in wheat annually, with Canada currently capturing only 1.7% of that market, demonstrating significant potential for quality Canadian wheat. Pork demand is also surging in the Philippines and Vietnam as diets become protein-rich; the devastation of African Swine Fever on local production in the Philippines has

³ Canada's canola product exports to China have plummeted in 2025 due to punitive Chinese tariffs.

made it highly reliant on imports, solidifying Canada's role as a key supplier with expected sustained demand.

Beyond bulk commodities, demand is strong across various high-value categories. Premium seafood like salmon, lobster, and crab is highly sought after in markets such as Vietnam and Singapore. Urbanization fuels the need for processed foods and confectionary in countries like Indonesia, Malaysia, and the Philippines. Opportunities also exist in industrial inputs, such as malt for the expanding brewing industries. Furthermore, the region is the world's largest market for Halal food, and consumers in the Republic of Korea, Japan, and Taiwan are increasingly seeking organic foods, with equivalency agreements in place to ease Canadian exports.

Future export growth is supported by specific consumer trends, including the booming pet care market, which offers a niche for high-quality pet food. The growing interest in alternative protein sources also creates opportunities for Canadian producers of peas and lentils and halal plant-based proteins. Capitalizing on these diverse market segments is key to realizing Canada's strategic trade diversification goals in the Indo-Pacific. India's government is considering guaranteeing Canada ongoing pulse crop sales to encourage continued cultivation (White, 2025).

In a report prepared for the Canadian Agri-Food Policy Institute (CAPI), agri-food expert Ted Bilyea recommends several actions to boost Canadian sales in the Indo-Pacific. These include building consensus among international net food exporters for a global coalition to counter the weaponizing of food and rebalance trade terms with net importers. The report also suggests offering an export assurance strategy to food-deficit allies, like Japan, which guarantees a prorated portion of crops in exchange for minimal annual purchases. Further recommendations include adjusting tax treatment for Canadian SMEs, especially food processors, to maximize accelerated investment incentives, revising the Competition Bureau's mandate to allow companies to cooperate on exports, and refocusing innovation on "moonshots" to create difficult-to-copy products (Bilyea, 2025).

3.3 Natural Resources and Critical Minerals

The global transition toward a lower-carbon and digital economy has created skyrocketing demand for critical minerals - the essential building blocks for technologies like EV batteries (lithium, cobalt) and wind turbines (rare earth magnets). According to the Canadian Critical Minerals Strategy, this massive demand presents a huge economic opportunity for Canada (Government of Canada, 2022). However, the supply chains for these essential commodities are highly fragile and geographically concentrated in jurisdictions that often do not adhere to high environmental, social, and governance (ESG) standards. This concentration creates strategic vulnerabilities for Canada and its allies, like recent dependence on oil and gas from non-like-minded nations.

Canada has the resources to provide a solution to this global dilemma. Canada possesses significant quantities of 31 critical minerals (including nickel and uranium), an established mining sector, a skilled workforce, and high ESG standards (Government of Canada, 2022). By leveraging these comparative advantages across the entire value chain - from responsible exploration and extraction to intermediate processing and recycling - Canada aims to become the secure, reliable "green supplier of choice." This integrated strategy provides a solid base upon which to build resilient

critical minerals value chains, ensuring long-term benefits flow to Indigenous partners, and ultimately creating jobs and prosperity across the country while powering the global energy transition.

Other natural resource export opportunities exist in energy security. Geopolitical turmoil has strained energy supply chains, highlighting the need for reliable partners and resilient value chains for strategic commodities. As Indo-Pacific nations pursue energy transitions, Canada is positioned to be a secure supplier of Liquefied Natural Gas (LNG). LNG is crucial for allies like Japan and Republic of Korea as they move away from higher-carbon sources like coal, helping them meet clean energy goals while ensuring stability (see section 3.4 below for opportunities in renewable energy trade).

Securing critical minerals is vital for the global economy's transition to low-carbon energy and digitalization. These minerals are essential inputs for advanced technologies like batteries, semiconductors, EVs, renewable energy systems (wind and solar), and advanced electronics. Canada is leveraging its reserves of minerals like cobalt, copper, lithium, and nickel to position itself as a trustworthy energy security partner. Many of Canada's trading partners are looking to increase and diversify their supply of responsibly produced critical minerals, and Canada already has agreements with several countries, including Indonesia, Japan, and the Republic of Korea to increase cooperation on, and investment in, Canada's critical mineral supply chain. In addition, at a bilateral ministerial dialogue on trade and investment held in November 2025, senior Canadian and Indian officials agreed to encourage long-term supply chain partnerships in critical minerals and clean energy collaboration vital to the energy transition (Global Affairs Canada, 13 November 2025).

Rapid urbanization across Southeast Asia is creating robust and sustained demand for Canadian lumber and forestry products. Canada's reputation for high-quality, sustainably sourced timber allows its forestry sector to capture high-value contracts for infrastructure and construction projects throughout the region. In response to the onerous U.S. tariffs imposed on Canadian forest products, the Government of British Columbia is actively exploring new markets for lumber exports, particularly in Vietnam and Japan.

3.4 Clean Technologies and Renewable Energy

The Indo-Pacific is “ground zero” for climate action, accounting for over half of global carbon dioxide emissions and being highly vulnerable to climate change effects. Addressing climate change and biodiversity loss requires the full participation of countries in the region. The IPS commits to aligning trade policy with net-zero commitments and deploying clean technologies, making sustainability a core component of its engagement.

The global transition to renewable energy generates vast opportunities for Canada, especially in green technology and low-carbon goods. Canada, with more than 80% of its electricity generated by non-emitting sources, is uniquely positioned to market a “Clean Canada” export brand to global buyers seeking low-carbon goods like steel, aluminum, and fertilizers (Clean Energy Canada, 2025).

The rapidly expanding demand for green technologies across Asia is rooted in the Indo-Pacific's immense scale and its position as the global center of economic dynamism. The demand for green technologies across Asia and the Pacific is set within a global market projected to exceed roughly US\$2.5 trillion, accounting for about 2% of global GDP (Borish, 2020). Specific markets in the Indo-Pacific are showing traction for cleantech sales, including Japan and India, which are viewed as non-traditional export destinations. Furthermore, Japan leads in global innovation for hydrogen generation and smart grids.

A significant aspect of demand in emerging markets, such as Bangladesh and India, is the potential to "leapfrog" larger, more expensive infrastructure. In regions lacking reliable electricity or relying on environmentally damaging coal plants, it can be more cost-effective to set up a micro-grid instead of building a large, centralized power plant. Cleantech applications are relevant across all sectors, including power generation, energy efficiency, and transportation (Borish, 2020).

3.5 Digital Technologies including Artificial Intelligence

Canada's digital trade faces a distinct and proliferating array of barriers compared to traditional goods. These obstacles have become increasingly common in recent years and primarily include regulatory requirements related to data privacy and consumer protection, rules mandating data localization, and policies that require companies to cede source code or other trade secrets. Additional hurdles involve stipulations for a local corporate presence or mandates to buy local, as well as various restrictions on foreign investment (Goldfarb and Suominen, 2025).

Developing new standards for digital trade and data governance can help reduce friction in the fastest-growing segment of global trade. Canada can play a key role in modernizing and expanding its digital trade deals to help shape global standards, specifically by leading the creation of new trade-related rules for AI policy. New standards are central to Canada's economic strategy because digitally delivered services exports have grown nearly four times faster than goods exports since 2005. Furthermore, these standards are necessary to counter the increasing obstacles to digital trade (Goldfarb and Suominen, 2025).

Canada has pioneered the inclusion of robust digital provisions in the CPTPP and is now pursuing accession to DEPA to bolster digital trade facilitation and cooperation on issues like AI and digital inclusion. ASEAN's emerging digital ecosystem offers significant opportunities for Canada to intensify its digital trade with the bloc. Following Malaysia's 2025 chairmanship, the Philippines will lead ASEAN in 2026 with digital innovation and adaptation as a key focus area (Bentley, 2025). To capitalize on the potential to expand digital trade in the Indo-Pacific, Canada should leverage its strengths in cutting-edge AI research and high-value digital services (e.g., computer services, professional consulting, R&D, and environmental expertise), which are now more easily exportable due to digitization. Further, Canada can boost its overall trade by helping exporters, including those in agriculture and manufacturing, scale up their digital adoption. Integrated use of technologies like AI and blockchain can also improve supply chain management.

4. Advancing Inclusion and Sustainability in Canadian Trade

Canada's approach to trade and gender is consistent with the Government of Canada's broader commitment to advancing gender equality and women's economic empowerment and complements its efforts to advance gender equality both at home and abroad. Canada's trade diversification strategy promotes an inclusive approach to ensure more Canadians benefit from global trade and investment. It focuses on groups traditionally under-represented in these areas - such as women, Indigenous Peoples, and SMEs - and supports trade policies that are sustainable, transparent, and inclusive (Government of Canada, 2025).

4.1 Empowering Women in Canada's Trade Promotion and Agreements

Canada promotes women's empowerment and gender equality in international trade through its Inclusive Trade Agenda. Gender equality and the avoidance of discrimination based on gender has been a priority for Canada during trade negotiations, notably through language regarding the elimination of employment discrimination in labor cooperation agreements and labor chapters in FTAs. In addition, gender chapters have been incorporated into FTAs such as the modernized Canada-Chile FTA and the CPTPP. Empowering women and removing gender barriers to trade strengthen economic ties and prosperity by unlocking untapped productive potential and expanding markets. International competitiveness is often associated with female participation in trade and the removal of gender barriers. Empowering women economically is a direct route to reducing poverty. Women typically reinvest up to 90% of their income into their families, leading to improved healthcare, education, and community well-being, which creates a positive ripple effect for economic prosperity.

These chapters commit partners to dismantling discriminatory barriers that impede women's participation and to promoting gender-sensitive policy and transparency. The CPTPP includes specific areas to be considered for collaborative work among parties to the agreement. One of these relates to women and economic growth, including helping women build capacity and skill, enhancing women's access to markets, obtaining technology and financing, establishing women's leadership networks, and identifying best practices in workplace flexibility.

In addition, federal trade agencies, including the EDC and Trade Commissioner Service (TCS), provide direct, targeted support to Canadian women. For example, EDC supports women-led businesses through financing and investment programs like the CAD \$200 million Inclusive Trade Investments Program, working capital guarantees, and equity funding. It also offers women-only export training through the Trade Accelerator Program, promotes supplier diversity, and funds the Women in Leadership Scholarship for students.

The TCS Women in International Trade program helps women entrepreneurs expand into global markets by organizing women-focused trade missions, creating valuable networking opportunities, and providing tailored guidance to navigate international business environments. TCS takes the view that ensuring everyone can participate in international trade unlocks diverse perspectives, ideas, and talents.

4.2 Integrating Climate into Trade Approaches

Climate change increasingly impacts Canada's economic relations with the Indo-Pacific region, creating both strategic risks and major economic opportunities. The region is highly exposed to climate impacts, accounting for more than half of global carbon emissions and nearly two-thirds of the world's oceans. This vulnerability is driving strong demand for clean technology and low-carbon solutions. Through the IPS, Canada is aligning trade policy with net-zero objectives to seize these opportunities. It is positioning itself as a reliable supplier of critical minerals and clean energy - essential for the global energy transition. Canada's overwhelmingly clean electricity grid strengthens its competitiveness in exporting low-carbon products such as steel and aluminum.

Food security is becoming a key trade dimension. As climate change intensifies food scarcity in South and Southeast Asia, Canada's agriculture - relatively advantaged by higher-latitude conditions - can serve as a reliable source of agri-food products to meet the region's growing needs. Climate resilience is also emerging as a strategic trade priority. Extreme weather events disrupt transportation infrastructure and supply chains, prompting Canada to promote high-quality, sustainable infrastructure investments in areas like renewable energy and water management through FinDev Canada.

FinDev Canada, in partnership with Mitsubishi UFJ Financial Group, Climate Fund Managers, and Pollination, operates the Global Access for Impact Alliance (GAIA), a US\$1.48 billion blended finance platform designed to scale climate finance in emerging markets, including the Philippines and India. GAIA mobilizes private, concessional, and philanthropic capital to support low-carbon, climate-resilient growth, particularly in least developed countries and small island states. About 70% of its investments target climate adaptation, aiming to reduce 30 million tonnes of CO₂ and benefit nearly 20 million people (FinDev Canada, 2024; Adamkiewicz, 2025).

A key Canadian policy goal is to align trade with environmental protection, ensuring that both reinforce each other. To achieve this, Global Affairs Canada, working alongside Environment Canada, integrates environmental commitments and considerations into the country's free trade agreements. For example, the Canada-Indonesia CEPA addresses the environment through a dedicated chapter on "Trade and Sustainable Development." In the Preamble, the two governments agree to promote high levels of environmental protection, including through effective enforcement of environmental laws and environmental cooperation, and to advance the objective of sustainable development in its economic, social and environmental dimensions through enhanced bilateral relations. One objective cited for Government Procurement is encouraging use of environmental and socio-economic considerations.

At home, Canada's trade infrastructure is increasingly vulnerable, with climate-related disruptions to roads, railways, and ports threatening trade flows and growth. Escalating floods, fires, and storms are disrupting key trade routes, damaging ports, railways, and highways, and costing billions in lost productivity and repairs. Canada needs to climate-proof trade corridors and make resilience central to its economic and trade strategies. Strengthening climate-resilient infrastructure is now a nation-building imperative: every dollar invested in key adaptation measures can prevent fifteen dollars in GDP losses (Sawyer and Ness, 2025).

5. International Development Assistance and Research

5.1 Integrating Trade and Development: Canada's Strategic Alignment in the Indo-Pacific

Through the IPS, Canada's deepening Indo-Pacific relationships are strategically aligned to boost commercial ties and to advance collective progress toward the SDGs. Key areas for cooperation include oceans management, climate finance, energy transition, and biodiversity loss. Through focused resource commitments and policy alignment, Canada is positioning itself as a committed partner whose long-term prosperity is linked to the region's success. The IPS states that Canada will work with Japan, a fellow G7 member, to promote international development through the Asian Development Bank (ADB).

Canada has integrated its trade and foreign aid agenda to address development challenges, champion gender equality, and defend human rights in the Indo-Pacific, including in Southeast Asia. According to Global Affairs Canada, the country has provided C\$5.6 billion in development assistance to the ASEAN region over the past 25 years. This includes regional and bilateral assistance to ASEAN and its members (see below) as well as through multilateral organizations (Global Affairs Canada, 2025).

The trade and investment pillar of the IPS directly supports international development by promoting inclusive social and economic efforts that generate a multiplier effect across the region. By expanding commercial ties, Canada aims to address persistent development challenges and advance the SDGs. Canada has strategically aligned its trade and investment agendas with the Indo-Pacific's requirements for stability, sustainability, and human capital development. Given recent decisions to reduce foreign aid, a trade-focused approach to development in the Indo-Pacific is becoming even more relevant.

For example, the CPTPP includes dedicated provisions on development. These recognize that open trade, investment, and inclusive growth are essential for improving welfare, reducing poverty, and raising living standards. Furthermore, these provisions emphasize the importance of creating high-quality employment to support sustainable regional development.

The multilateral trade accord includes three specific areas to be considered for collaborative work on development as the CPTPP enters into force for each party: (1) broad-based economic growth, including sustainable development, poverty reduction, and promotion of small businesses; (2) women and economic growth, including helping women build capacity and skill, enhancing women's access to markets, obtaining technology and financing, establishing women's leadership networks, and identifying best practices in workplace flexibility; and (3) education, science and technology, research and innovation. Unlike some traditional trade agreements where development provisions are aimed solely at emerging economies, the CPTPP's framework for cooperation is inclusive and reciprocal, applying to all members regardless of their level of development.

Two or more parties may undertake joint activities with the view of helping to ensure that the benefits and opportunities of the agreement are more widely shared and contribute to the advancement of each party's development goals. The CPTPP also establishes a development committee to facilitate the exchange of information and best practices and promote cooperative work related to the objectives of the CPTPP and new opportunities as they arise. Separately, the

IPAAO office in Manila helps to tackle regional food security challenges by removing regulatory and other obstacles to the importation of high-quality Canadian agricultural, agri-food and seafood products.

Canada supports the ASEAN region through various development activities aimed at shared priorities. Since it was launched in 2017, the Scholarships and Educational Exchanges for Development (SEED) program has enabled more than 800 students from ASEAN countries to conduct studies or research in Canada, focusing on fields that help narrow regional development gaps. Complementing this, the Empowering Women for Sustainable Peace project strengthens the Women, Peace and Security agenda by promoting social cohesion and preventing violence against women, aligning with Canada's National Action Plan.

Additionally, the ASEAN-PRIME and ASEAN-BRACE initiatives are building the region's resilience to climate change and disasters by improving governance and civil society engagement. Further cooperation is facilitated by the ASEAN-Canada Plan of Action Trust Fund, which provides technical assistance in sectors like energy and food security, and the OECD Southeast Asia Regional Programme (SEARP), which supports policy reform and regional economic integration.

5.2 Filling the Knowledge Gap around Trade and Development

Understanding the link between Canada's trade and development approaches in the Indo-Pacific, and the outcomes that these approaches generate, can help ensure that benefits reach both Canadian and regional stakeholders. Trade and economic cooperation agreements can drive growth, increase prosperity, and support sustainable infrastructure, but only if they are designed and implemented with evidence-informed strategies.

Emerging trade priorities - digital trade, gender equality, climate action, and secure supply chains - mean trade cannot be viewed solely as an economic tool. It is also a lever for promoting resilience and inclusive, sustainable development. Rigorous research can show how Canadian trade initiatives empower women entrepreneurs, promote clean technology adoption, and enhance ability of local economies to withstand and recover from crises, while identifying risks that might undermine these objectives.

To fulfill these objectives, research could, for example, evaluate implementation gaps in current trade agreements to track impacts on marginalized groups and analyze which blended finance models could effectively de-risk clean tech projects. Research questions could address how Indigenous consultation models and equity ownership in critical mineral sectors might be adapted across different legal frameworks to ensure resilient local economies.

Indicative programming might include training for SMEs to use digital trade provisions and "value-addition blueprints" that help traditional sectors - like agriculture - integrate IoT and AI for predictive supply chain management. Technical assistance could be provided to reinforce trade infrastructure against climate threats like sea-level rise. Identifying regulatory and physical risks would assist in the formulation of approaches that empower women entrepreneurs and ensure long-term economic stability. Such research is particularly important considering foreign aid cuts by

traditional donors, creating a gap that Canada – despite its own cuts to international assistance - can help fill through smarter trade-linked development.

The International Development Research Centre (IDRC) is well-positioned to play an active role in this research given its deep experience and presence in Asia, strong local networks, and proven capacity for applied, policy-relevant studies. By generating actionable insights, IDRC-supported research could guide Canada’s trade engagements to maximize economic benefits while minimizing social and environmental risks. Applying research findings can strengthen regional partnerships and enhance outcomes for people and businesses on both sides of the Pacific Ocean.

5.3 A Research Agenda on Trade and Development

In a time of rapid geopolitical shifts, technological disruption, growing inequities, and climate pressures, Canada faces both challenges and opportunities in adapting its broad-based engagement with the Indo-Pacific. To adapt and thrive in this evolving landscape, a forward-looking research agenda can generate evidence that strengthens such regional engagement. This section proposes a research agenda prioritizing themes that directly link Canada's commercial interests with sustainable development outcomes and regional stability, reflecting the Carney Government's intention to enhance trade with the Indo-Pacific while ensuring development assistance is targeted and effective.

The proposed research is organized under three thematic pillars which collectively host seven research themes. This structure would help to develop analysis and recommendations to inform policy across trade, foreign affairs, and international development. The three pillars, described below, are: Economic Resilience, Climate Adaptation, and Development; Inclusive Economic Participation; and Digital Trade, Innovation, and Competitiveness. Intentionally, they are not ranked by importance as they form an integrated, holistic research program addressing trade and development in the Indo-Pacific.

Pillar One - Economic Resilience, Climate Adaptation, and Development: This pillar addresses the fundamental stability of trade and development in the region, focusing on systemic risks. These topics are highly relevant because regional and global supply chain disruptions (exacerbated by climate change) and geopolitical fragmentation directly threaten Canada's economic security and its partners' development gains in the Indo-Pacific.

One research theme under this pillar would focus on “Climate Resilient Supply Chains and Trade Infrastructure”, analyzing the implications of climate change and energy transition on domestic and regional economies. Reliable, climate-resilient trade networks safeguard both Canadian and regional economic interests. This theme could add value to existing research on supply chains by offering risk-mitigation strategies and specific proposals for where Canadian technical expertise and development assistance could strengthen trade infrastructure against climate threats.

The second theme under this pillar, “Trade-Linked Development Finance for Sustainable Growth”, would explore how to structure Canadian development assistance in a way promoting both sustainable trade and economic resilience in Indo-Pacific states. Insights generated through research on this theme could be used to spur private investment into low-carbon, climate-resilient

infrastructure. To add value, work under this theme could move beyond descriptive analysis that lists existing projects to research that identifies exactly which blended finance and other financial structures work best for specific risks, attract capital and maximize development impact.

Pillar Two - Inclusive Economic Participation and Gender Equality: The second of three pillars would aim to promote alignment between Canada’s new approach to economic engagement and development in the Indo-Pacific with the country’s core values in order to promote equitable growth that benefits all segments of society. Canada intends to continue applying a feminist lens to international development assistance even if not necessarily within the framework of a Feminist International Assistance Policy. The two themes addressed under this pillar are “Inclusive Trade and Economic Engagement” and “Ensuring Indigenous Involvement in Resource Development”.

“Inclusive Trade and Economic Participation” would explore how trade liberalization affects marginalized groups, including women, SMEs, and Indigenous communities – and how development assistance can enhance their participation in trade, thereby contributing to equitable long-term growth. While there is a rich pool of research on the impact of trade agreements, more attention can be given to implementation gaps. For example, a research project could be designed to create a measurable index tracking the impact of trade agreements on marginalized groups and identifying interventions to spread the benefits of trade more equitably.

The other proposed theme under Pillar 2, “Indigenous Involvement in Resource Development,” would examine what support could be provided to Indigenous communities to consistently involve them in critical mineral projects. Such support might include capacity building and equity ownership. Experience in Canada and elsewhere shows that strong Indigenous partnerships reduce project risk, enhance sustainability and align resource development with social and environmental objectives.

To supplement completed domestic research on this theme, new work could explore international good practice for Indigenous consultation and benefit-sharing in critical mineral projects in the Indo-Pacific. Indicative examples include extraction projects for nickel in the Victoria-Anepahan Mountains in Palawan, Philippines, which are ancestral domains for the Tagbanua; for nickel and copper in Sulawesi and North Maluku, Indonesia, overlapping with the territories of forest-dwelling Indigenous groups; and for rare earths in the Central and Northwestern Highlands of Vietnam, home to diverse ethnic minorities..

Pillar Three – Digital Trade, Innovation, and Competitiveness

The final research pillar would investigate how digital technologies transform value creation and supply chain efficiency. This pillar comprises three themes: “Leveraging AI and Frontier Technologies to Facilitate Trade;” “Digital Trade and SME Competitiveness;” and “Optimizing Use of Digital Trade Agreements”.

Research under the theme “Leveraging AI and Frontier Technologies to Facilitate Trade” would explore how tools like blockchain can reduce border friction and enhance real-time supply chain management. Current research is nascent and new studies could contribute to developing policy options for regulatory harmonization. One topic that could be explored is safe adoption of

predictive border management, which uses AI to analyze historical data and real-time trends to anticipate potential bottlenecks, verify compliance automatically, and clear low-risk shipments before they arrive at the port. Shifting from reactive inspections to data-driven forecasting could facilitate trade between Canada and its partners.

Work on “Digital Trade and SME Competitiveness” would involve mapping barriers and opportunities for Canadian SMEs exporting digital services and examining how traditional sectors can embed digital services to boost export competitiveness. Research on regulatory hurdles and digital infrastructure can usefully guide policy interventions. This research area could generate new insights by identifying specific digital blueprints for important Canadian export sectors (e.g., using the Internet of Things in precision agriculture exports) to create higher-value exports.

The last of seven indicative research themes would assess the extent to which Canada’s digital trade agreements have been used – and underutilized – and how monitoring, compliance support, and revisions could improve the effectiveness of the agreements. The learnings from this thematic deep-dive could highlight country-specific actions and training to increase use of digital provisions of trade agreements by Canadian and regional SMEs

6. Conclusion: Capitalizing on Canada’s Strengths to Enhance Engagement with the Indo-Pacific

The global trading system is undergoing a seismic transformation, defined by escalating geopolitical rivalry and a steady erosion of the multilateral order. For Canada, this shift has transformed trade diversification from a long-standing policy goal into an urgent strategic imperative essential for national resilience and economic security. Historically reliant on the United States for three-quarters of its goods exports, Canada now faces significant vulnerability due to increasingly unpredictable U.S. trade policies, underscored by the abrupt termination of tariff discussions in late October 2025. Simultaneously, strained relations with China, marked by coercive diplomacy and retaliatory tariffs, further substantiate the need for a robust pivot toward alternative economic partnerships.

One of Canada’s most significant responses is a generational shift toward the Indo-Pacific, formalized through the 2022 Indo-Pacific Strategy (IPS). By deepening engagement with diverse economies, Canada seeks to shift from the dominant Canada-U.S. trading model to a globally integrated network with critical East-West linkages. To support this transition, Ottawa has allocated CAD \$2.3 billion over five years to fund the IPS, including expanded trade and strengthened supply chain resilience. Trade-related milestones in Canada’s engagement of the Indo-Pacific include the CPTPP, the newly signed CEPA with Indonesia, and renewed momentum toward a negotiated CEPA with India. These trade accords contribute to IPS implementation by leveraging Canada’s sectoral strengths – in areas like agri-food, clean technology, critical minerals, and digital services - to meet growing regional demand driven by rapid urbanization and a burgeoning middle class.

This strategic reorientation is intrinsically linked to Canada’s commitment to an inclusive and sustainable trade agenda that provides benefits for devel. By incorporating gender chapters into

trade agreements and prioritizing Indigenous participation in resource projects, Canada aims to ensure that economic growth benefits all segments of society. To maximize the impact of these initiatives, this white paper proposes a forward-looking research agenda focused on economic resilience, inclusive participation, and digital innovation. Such an evidence-based approach – exploring tools like predictive border management and climate-resilient supply chains – can help ensure that Canada remains a dependable, competitive, and secure partner for Indo-Pacific countries in a fragmented global order.

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