



# Well Made Here - Market Diversification Survey: Analysis and Prospective Developments

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## Introduction and Objectives

Considering the geopolitical and global economic state we have been facing since the start of the year 2025, with Canada and the United States both undergoing federal changes, a lot has been going on. At the beginning of March, various industries within Canada were greatly impacted as the first tariffs were imposed on us by the new Trump administration.

The importation and exportation of goods between our country and our neighboring country were affected by the introduction of 25% tariffs, with steel and aluminum being targeted equally only a week later. This caused outrage in all provinces and in countless industries, including the building material sector. Not only did this create an instant barrier between us and one of our biggest clients, but all steps of the supply chain were impacted by these changes.

Customers are apprehensive of price increases on building materials, contractors expect decreases in clients and contracts, retailers are experiencing a drop in customer traffic and are already facing increased supply costs, banners had to accelerate the demonstration of their Canadian authenticity, and finally, manufacturers faced component shortages, cost increases, and declines in sales.

That is when this survey was created by us at Well Made Here, end of March 2025. Called the Market Diversification Survey, our study provided to all of our member manufacturers as an opportunity to help us get a grasp of their current situation in the face of the new tariffs. The objective was to use the submitted data to analyze and produce two activity projects: one regarding the domestic market and the other focusing on international alternatives to USA.

**(refer to APPENDIX 1)**

## Methodology

To accumulate data, our intern, Rachel Blondeau, was assigned the task of gathering responses from participating manufacturers. She was able to collect a total of 20 complete responses. The responses were all from our manufacturer members, some newly introduced to our program, while others had been with us prior to the recent changes directing more consumers to buy locally made Canadian products, which consequently brought attention and value to our program.

Over half of these responses were from companies based in the province of Quebec; however, other provinces involved include Ontario, Manitoba, and British Columbia. We opened our survey for responses on the 24th of March and closed it on the 30th of May, giving our members 50 working days to choose whether or not to participate in our questionnaire. A limitation to our sample is that 14 responses came from Quebec-based manufacturers, while only 6 responses came from other provinces. This means that all comparisons made between these two groups are limited by the generalizability of a 20 response sample, in addition to comparisons made between a majority and a smaller group sample.

The survey itself consisted of a total of 19 questions: the first 6 were demographic questions designed to identify who was submitting responses and from which company, as well as to collect contact information if follow-ups were needed. The remaining 13 questions included 10 numerical questions, in which we asked respondents to submit data related to their current sales and supply global dispersions, as well as their desired dispersions in 5 years (all in percentages). The final 3 were multiple-choice questions in which we asked our respondents for their opinions on the biggest barriers and the types of support that would help diversify their markets.

**(refer to APPENDIX 2)**

## Key Findings

### **1. Strong domestic focus with gradual diversification intent;**

Current sales and supply chains are heavily concentrated in Canada, especially within the respondents' own provinces. However, there is a clear desire to expand both sales and supply sources beyond provincial and national borders in the next 5 years. Manufacturers want a more balanced domestic footprint, aiming for increased sales in other Canadian provinces without reducing sales at home.

### **2. United States and Europe are key targets for expansion;**

The United States is the primary international market, with Region I (New England) being most prominent for Quebec manufacturers and Region V (Midwest) for others. Interest in European markets is led by Western Europe, although current engagement is very limited. There is some growing interest in Asia, though less prioritized than the U.S. and Europe.

### **3. Online sales are underdeveloped but promising;**

Currently, online sales make up only 4% of total revenue but are expected to grow to 14% in the next 5 years. This indicates untapped potential and a recognition among participants that e-commerce could support market diversification.

### **4. Regulatory and structural barriers are major challenges;**

Regulatory differences between provinces are seen as the biggest barrier to domestic market expansion. Other significant barriers include:

- Transportation regulations, especially in construction
- Local procurement policies
- Licensing and certification restrictions
- Cultural and language barriers

These point to the fragmentation of Canada's internal market, particularly in regulated sectors like construction.

### **5. Clear preferences for support mechanisms;**

To enter foreign markets, respondents prefer:

- Distributors (most selected)
- Strategic alliances

For general expansion, the top choices were:

- Access to financing and grants

- Participation in trade fairs and trade missions

Secondary but important needs include:

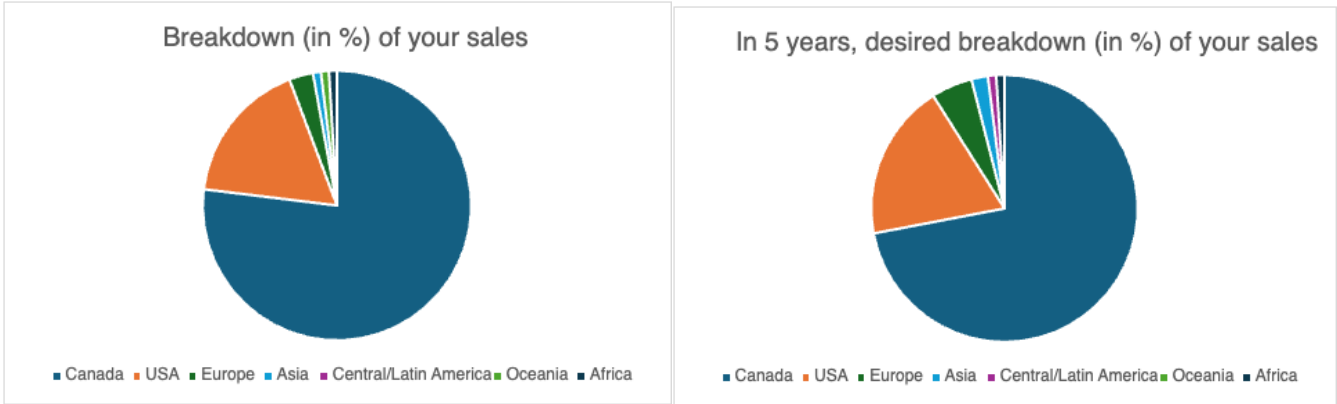
- Market research and intelligence
- Support with regulatory compliance and market adaptation

These responses show manufacturers are aware of the tools they need, but may lack access or resources to pursue them.

**(refer to APPENDIX 3)**

Detailed Analysis

Sales Rates



In the first pie chart, a clear dominance in sales within Canada, holding 77.2%, can be observed, with sales in the United States accounting for 17.5%, representing the second-highest percentage. Europe comes third, with a higher percentage than the remaining countries listed, but still significantly lower than the two most dominant markets.

In the second pie chart, there is an observed increase in the desired sales rate in the United States, reaching 19.1%, as well as in Europe, which holds 5.4%, in contrast to the first graph. Additionally, a slight interest in the Asian market can be observed, while the other markets remain of notably low interest.

What can be deduced from this is that while our member manufacturers maintain a strong primary presence and interest in the Canadian market, they also share a desire to diversify by increasing their sales in the United States, while exploring opportunities in European and Asian markets. There is also potential consideration of expanding into other international markets that may not have been previously considered by our Canadian members prior to the recent changes our industry has been facing.

## Supply Rates



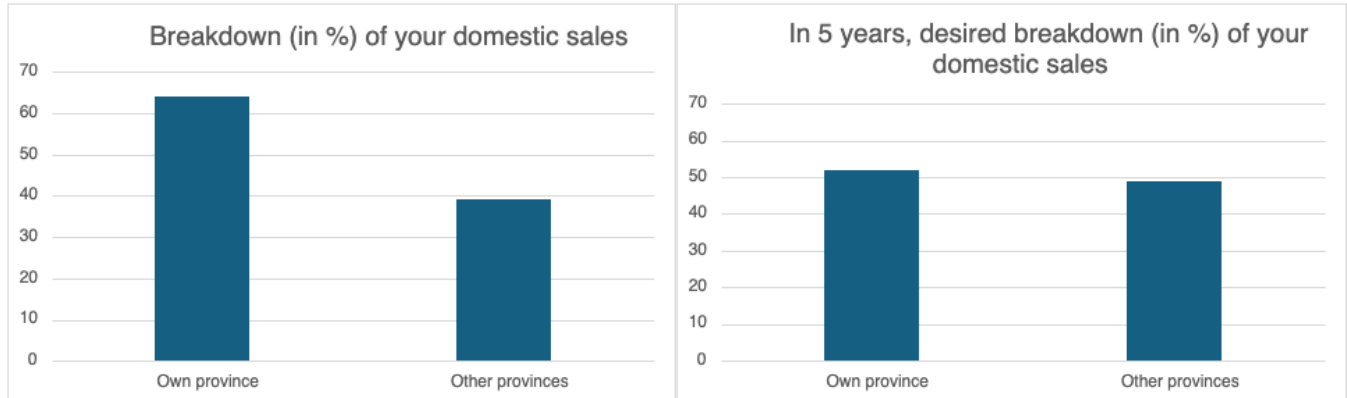
In the first pie chart, the supply sources are more diversely spread, with Canada still demonstrating strong dominance, holding 75.8%. The second-highest supplier is Asia, with 12.4%, closely followed by the United States at 9.45%. Europe holds a slight but inconsequential percentage of the total supply rates submitted by our respondents.

In the second pie chart, there is a 2.8% increase in the desired supply rates from Canada over the next 5 years. Asia, at 8.6%, and the United States, at 8.3%, show nearly equal levels of interest but both are reduced compared to their current supply rates. European supplies show an increase in interest, taking a larger share of the total desired supply rates.

What can be deduced from this is that while three-quarters of the current materials used by our member manufacturers are already sourced within Canada, there is a desire to further increase the percentage of domestic material sourcing. Additionally, although Asia is currently the second-largest source of materials, members appear to wish to reduce this share and seemingly replace it with local suppliers. The third-largest source is the United States, and members also wish to slightly reduce sourcing from this country. Another interesting finding is that there continues to be an interest in diversifying supply sources to foreign countries, as demonstrated by the increased desire to acquire materials from European suppliers.



## ***Domestic Market***

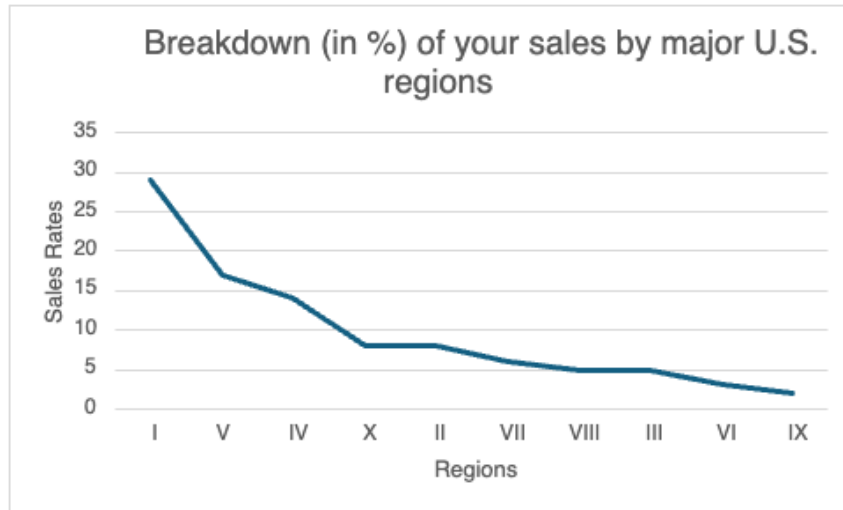


In the first column chart, there is a noticeable contrast between domestic sales occurring within the provinces in which the respondents operate, at 62.25%, while their out-of-province sales distribution remains significantly high at 37.75%.

In the second column chart, it can be observed that the desired own-province and other-province sales for five years' time are ranked much closer, demonstrating an almost even interest in inner and outer provincial markets for domestic sales, with only a 10.4% difference.

While most current domestic sales are occurring within the provinces where our member manufacturers are based, there is a clear desire not only to increase their sales in other provinces within Canada, but also to establish a more balanced sales distribution, equally divided between their own provinces and others. This does not necessarily imply a reduction in sales within their own provinces, but rather an overall increase in total sales through the diversification of their domestic consumer bases beyond their home provinces.

## USA Market



Region I: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont

Region II: New Jersey, New York, Puerto Rico, US Virgin Islands

Region III: Delaware, District of Columbia, Maryland, Pennsylvania, Virginia, West Virginia

Region IV: Alabama, Florida, Georgia, Kentucky, Mississippi, North Carolina, South Carolina, Tennessee

Region V: Illinois, Indiana, Michigan, Minnesota, Ohio, Wisconsin

Region VI: Arkansas, Louisiana, New-Mexico, Oklahoma, Texas

Region VII: Iowa, Kansas, Missouri, Nebraska

Region VIII: Colorado, Montana, North Dakota, South Dakota, Utah, Wyoming

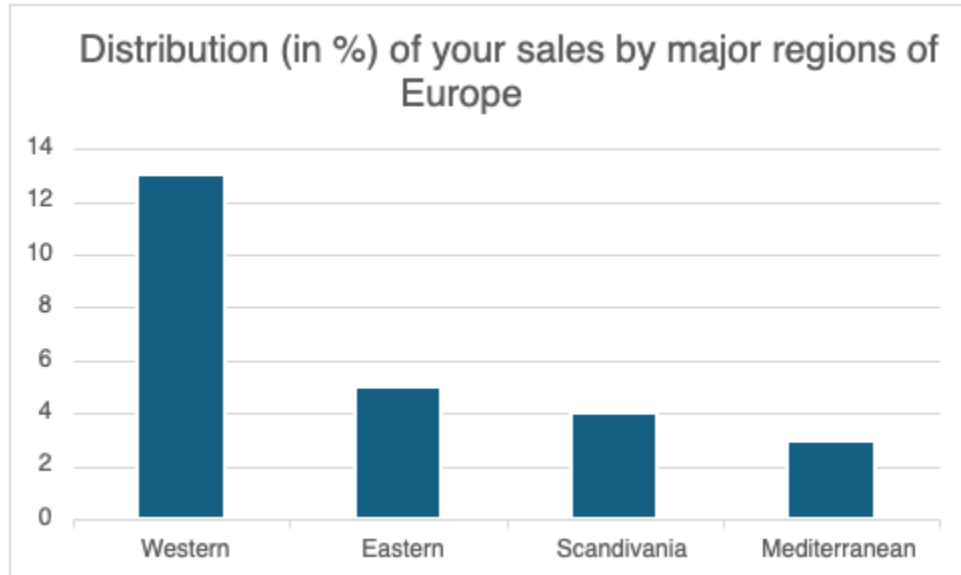
Region IX: Arizona, California, Hawaii, Nevada, American Samoa, Guam, Northern Mariana Islands

Region X: Alaska, Idaho, Oregon, Washington

In this line graph, the breakdown of sales distribution throughout the United States shows that the highest percentage of sales in this market comes from Region I, holding 29.8%. This is followed by Region V with 17.5%, and closely behind, Region IV with 13.95%. It can be observed that all regions report some level of sales activity, with the lowest percentage, around 2.5%, in Region IX. However, no region shows a zero sales rate among the sample of our respondents.

What can be deduced from this is that Region I, more commonly known as New England, has a strong consumer base for products sold by our member manufacturers. An additional or alternative assumption could be that this region maintains strong trade or logistical connections with Canadian-based manufacturers. Similar assumptions may be made for Region V, more commonly known as the Midwestern US or “the Midwest,” and Region IV, more commonly known as the Southeastern US or “the South.”

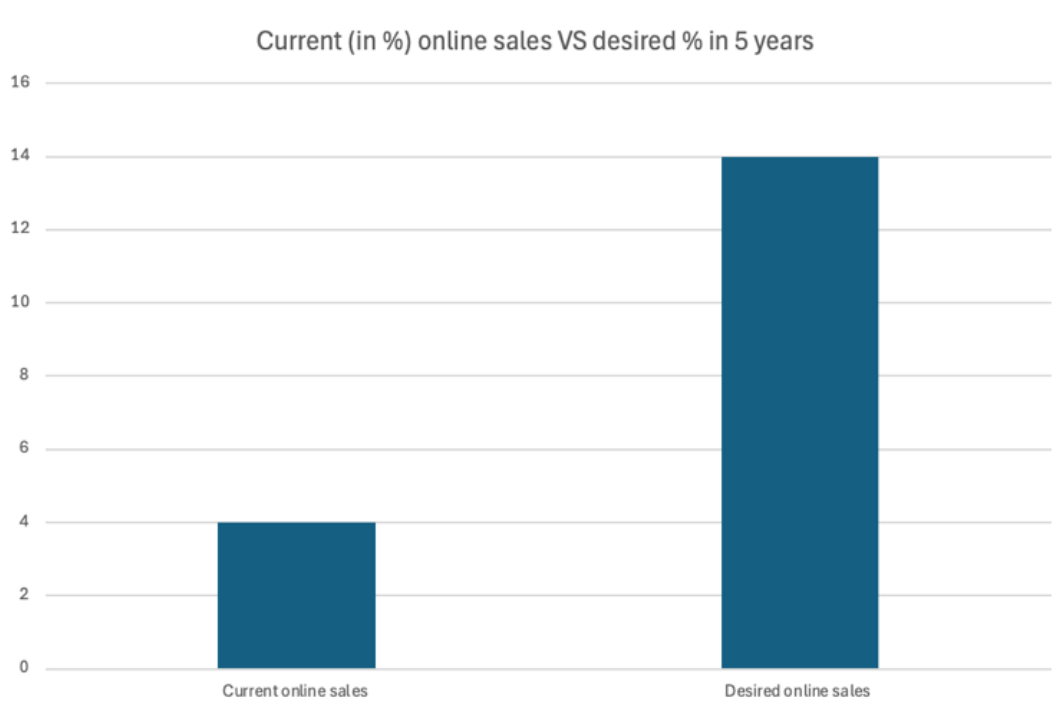
## ***Europe Market***



In this column chart, the breakdown of sales distribution across four major regions in Europe shows that the highest percentage of sales in this market comes from Western Europe, holding 53%. This is followed by the three remaining regions, which are closely dispersed: Eastern Europe comes second with 18%, followed by Scandinavia with 17%, and finally Mediterranean Europe with 12%. It is important to note that the findings for this graph are very limited, as 15 respondents reported no sales in Europe, meaning the data used consisted of only 5 applicable responses to this question.

What can be deduced from this is that Western Europe, which includes countries such as Austria, Belgium, France, Germany, Liechtenstein, Luxembourg, Monaco, the Netherlands, and Switzerland, may be more receptive to selling international products and diversifying their markets by collaborating with manufacturers originating from Canada. Furthermore, the lack of respondents currently selling their products to European markets indicates a limited diversity of sales outside North America, making this a key topic of interest to explore further. Investigating the causes behind this and identifying potential opportunities for our member manufacturers in the future will be essential.

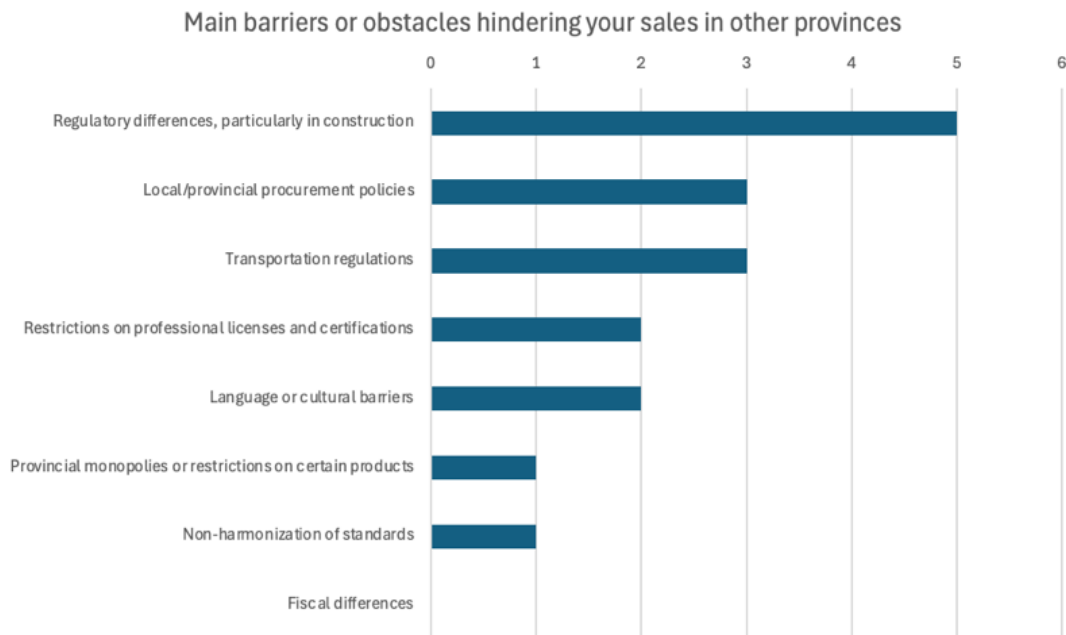
## Online Sales Rates



In this line graph, there is a considerable difference between current sales revenue from online sales, accounting for 4% of the total revenue produced by our respondents, and their desired online sales rate over the next 5 years, which holds 14%. This demonstrates a 10% increase from current to desired online sales.

What can be deduced from this is that currently, a very low percentage of sales for our member manufacturers is generated through online platforms, meaning the vast majority of their sales occur through retailers or other clients, whether direct consumers or contractors. The desired increase in revenue from online sales over the upcoming 5 years indicates that this is a key area to investigate further. Understanding the current limitations preventing higher online sales rates will be essential, as this market presents significant potential benefits, including the ability to efficiently diversify markets and explore new opportunities.

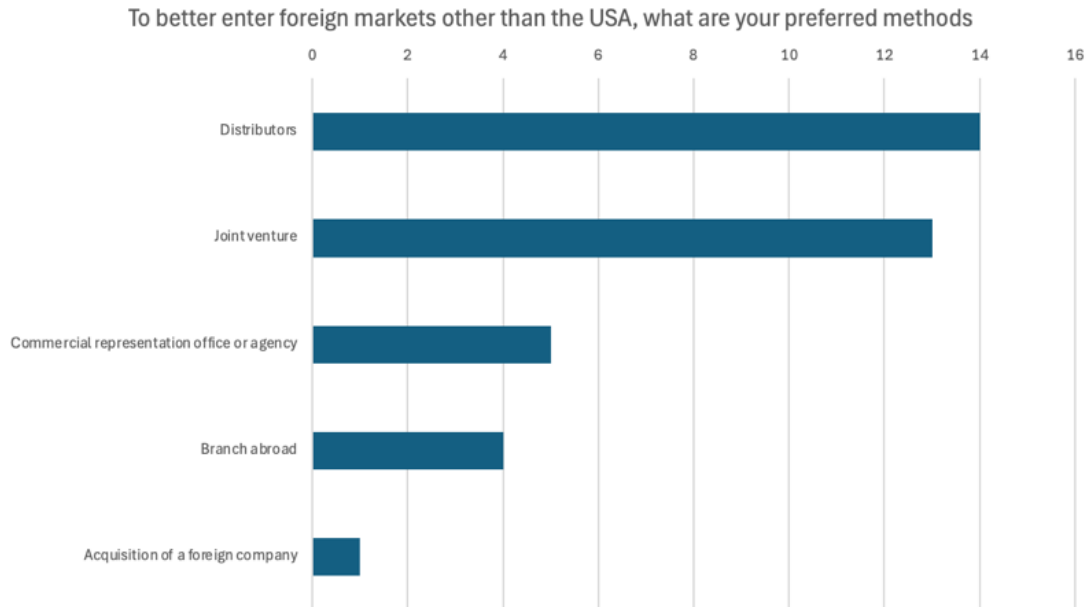
## Barriers



In this bar chart, there is a clearly dominant factor identified as the biggest barrier hindering respondents from achieving sales in other provinces: regulatory differences, holding 29.4%. With an equal number of selections, the second-biggest barriers are transportation regulations, particularly in construction, and local/provincial procurement policies, both holding 17.65%. Less prominent but still commonly selected barriers, each holding 11.8%, are language and cultural barriers, as well as restrictions on professional licenses and certifications.

What can be deduced from this is that the most significant and impactful barrier affecting our member manufacturers who wish to increase their sales or explore new markets in other provinces is the regulatory differences between provinces. This is especially true in the construction sector, which is more likely to face stricter regulations affecting safety standards, licensing, interprovincial preferences, operational methods, and labor rules. This ties in with the other barriers selected by our members, transportation regulations and local procurement policies, all of which limit domestic market diversification due to individual provinces setting their own standards and laws aimed at prioritizing their own economic performance, social well-being, and environmental quality.

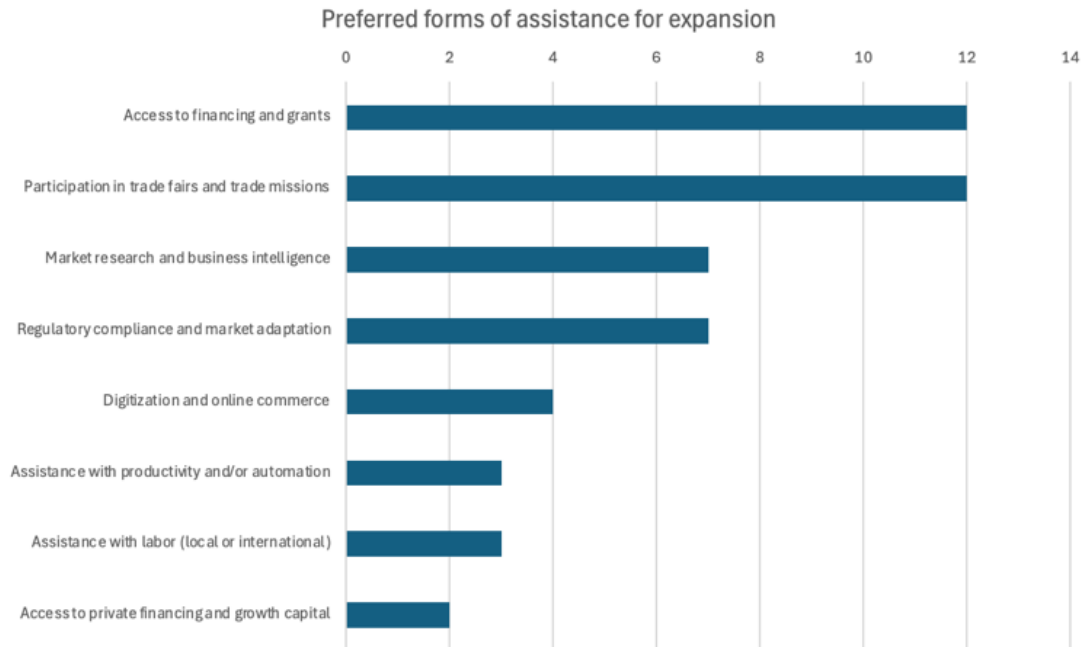
## *Preferred Methods*



In the first bar chart, the most prominent method of assistance preferred for entering foreign markets was the use of distributors, holding 37.8%, followed by strategic alliances in second place with 35.1%. With a lower selection rate but still ranking third was commercial representation offices or agencies, at 13.5%.

What can be deduced from this is that, for our member manufacturers, the preferred method of assistance to enter foreign markets would be through distributors. This aligns with their influential role in the supply chain, acting as intermediaries between manufacturers and retailers. Gaining access to distributors with established connections in new markets would allow manufacturers to broaden and diversify their consumer bases while maintaining their current operations.

## Assistance Needs



In the second bar chart, the preferred forms of assistance for expansion show a broad consensus, with two equally ranked top options and two equally ranked second-highest options. The two highest-ranked options, each holding 24%, were participation in trade fairs and trade missions, as well as access to financing and grants. The two second-highest-ranked options, each holding 12%, were regulatory compliance and market adaptation, along with market research and business intelligence.

The preference for access to financing and grants aligns with the increased costs associated with exporting goods, whether due to tariffs, transportation limitations, or other challenges, which makes market diversification a financially demanding option for many of our members, especially after facing rising operational costs within their own country of origin. The other preferred form of assistance, participation in trade fairs and missions, presents a valuable opportunity for members seeking to explore new markets, as it enables them to reach a broad audience, attract new consumers, generate leads, and build brand awareness.

Our members appear to have a clear understanding of what is needed to diversify their markets. The key questions that now arise are: where and how can they gain access to these resources, and how can we, as an organization, help ensure their success?

**(refer to APPENDIX 4)**

## Conclusion and Prospective Action

If we take for account that this sample used from our survey can be generalized to all our members, we would assume that it is important for us to take this opportunity to address the current interests and concerns of our members and provide them with project plans for the following years of their development in consideration of the current events we are facing.

Primarily, as a non-profit organization, we use the brand recognition we are developing to help our members advertise their brands as associated with us, which has come in handy as of latest news which have directed Canadian consumers to buy products made and sold locally. Here are three activity plans which will be developed for our members to implement them into future projects:

### **1. Domestic Market;**

To support domestic market growth, we could explore advocating for greater regulatory harmonization across provinces, particularly in the complex sector of construction, where licensing, safety, and procurement requirements vary widely. Working with federal agencies and industry partners could help advance pan-Canadian standards and reduce trade friction.

We may also consider identifying high-potential, underserved provinces for targeted expansion. Developing tools to help manufacturers navigate local regulations and procurement systems could equip them to grow beyond their home regions.

To support sales diversification, we could offer regional matchmaking services and organize targeted missions across Canada. These efforts would help connect members with new clients, contractors, and retailers, contributing to a more balanced distribution of domestic sales.

Finally, strengthening domestic supply chains is another potential priority. This might include initiatives to connect members with Canadian suppliers and reduce reliance on USA and Asian inputs by mapping viable local sourcing alternatives.

### **2. Foreign Markets;**

To support international expansion, we should prioritize strategic markets based on demand and compatibility. USA regions like New England, the Midwest, and the South may offer



strong entry points due to established trade links and shared consumer profiles. At the same time, exploring opportunities in Western Europe could help members diversify beyond North America, given the region's openness to Canadian products.

We might also consider facilitating introductions to vetted trade partners, such as distributors and buyers, in the USA and Europe. Partnering with Canadian trade commissioners and export agencies could help members access underutilized but promising markets more effectively.

To improve supply chain resilience, we could assist members in shifting away from Asian sourcing by connecting them with reliable suppliers in Europe and North America. Offering workshops focused on sourcing strategy and risk management would support more sustainable supplying decisions.

Additionally, preparing members for international e-commerce could open new channels for growth. Educating or informing them in areas like digital marketing, cross border logistics, and platform selection would help build capacity for global direct to consumer sales.

### **3. Combined Domestic & Foreign Markets;**

We could consider adopting a dual advocacy approach that addresses both domestic and international trade challenges. This would involve working toward interprovincial regulatory alignment while also engaging policymakers to reduce global trade barriers such as labeling inconsistencies and technical standards. A coordinated industry voice could help streamline rules and support member competitiveness at home and abroad.

To bridge domestic and international opportunities, we might explore launching a unified business development program that supports entry into both new provinces and foreign markets. Joint trade events could bring together domestic buyers and international distributors, boosting exposure for Canadian manufacturers in both arenas.

Improving digital sales capacity is another opportunity. Developing an e-commerce expansion toolkit, with guidance on cross-border logistics, digital marketing, and platform use, could help members strengthen their online presence. A shared marketplace for Canadian-made products, similar to the one we are currently working on, may also be a useful resource worth developing.

Finally, we could take a more integrated approach to funding and market exposure by combining support across both domestic and international initiatives. This could involve facilitating our members' access to existing grant programs and other financial resources in order to subsidize their participation in high-value trade shows and outbound missions, both in Canada and abroad, focusing on events that align closely with our their target markets and demonstrate strong potential for business growth and long-term partnerships.

**(for additional info. refer to APPENDIX 5)**

## APPENDIX 1

### **EMAIL SENT TO MEMBERS**

**Cher manufacturier participant,**

Comme l'a mentionné M. Darveau dans son [message du 24 mars](#), j'ai le plaisir de collaborer avec **Bien Fait Ici** en tant que stagiaire en marketing international.

Ma mission? Mettre à jour le profil des manufacturiers ayant accrédité des produits avec notre programme, puis fouillez avec vous deux angles devenus incontournables depuis la nouvelle ère Trump: vos ventes actuelles et vos ambitions, tant au Canada qu'à l'international.

Avant d'aller plus loin, un accord de confidentialité devra être signé afin de garantir des échanges d'information en toute sécurité. Je vous invite à en prendre connaissance en pièce jointe et à me le retourner signé ou avec vos commentaires.

Une fois cela fait, vous pourrez compléter un [questionnaire](#) dont les données me permettront de formuler des recommandations à notre direction les meilleures actions collectives à poser pour appuyer vos efforts de diversification de marché.

N'hésitez pas à me contacter par courriel ou téléphone, dans la langue de votre choix. Je suis là pour vous.  
Au plaisir de bâtir ensemble une collaboration prometteuse!

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**Dear participating manufacturer,**

As mentioned by Mr. Darveau in his [March 24 message](#), I'm pleased to be collaborating with **Well Made Here** as an international marketing intern.

My mission? To update the profiles of manufacturers who have accredited products with our program—and to dive into two key dimensions that have become essential in the new Trump era: your current sales and your aspirations, both within Canada and abroad.

Before we go any further, I kindly ask you to review and sign the attached confidentiality agreement to ensure our data exchanges are completely secure. Feel free to return it signed or with any comments you may have.

Once that's done, you'll be invited to complete a [questionnaire](#). The data collected will allow me to make well-informed recommendations to our leadership team on the best collective actions we can take to support your market diversification efforts.

If you have any questions, I'm just an email or phone call away in the language of your choice.  
Looking forward to building a meaningful and promising collaboration with you!



## APPENDIX 2

### **MEMBER RESPONSES**

#### **Group QC;**

Matériaux Blanchet- QC  
Adfast Canada Inc- QC  
J.A. Roby- QC  
Groupe Finitec- QC  
Granules LG Inc- QC  
Colorantic- QC  
Ekilab- QC  
OSBLOCK™- QC  
Fenplast- QC  
Acti-Sol Inc- QC  
La Règle de Bedford Ltée- QC  
Rudbecom Inc- QC  
Indigo Soda- QC  
Interbois- QC

#### **Group ON et al.;**

Vicwest- ON  
Cornerstone Building Brands- ON  
Renin Canada Corp.- ON  
City Sheet Metal Co. Ltd- MB  
Barkman Concrete Ltd.- MB  
Global Dec-k-ing Systems- BC

#### **Incomplete;**

ABB Électrification Canada Inc- QC  
Ferblanterie Daoust Inc- QC  
Condor Chimiques- QC  
Super Décapant- QC  
T.S. SIMMS- NB

## APPENDIX 3

### PERCENTAGES OF RESPONSES

7.

#### **Breakdown of sales;**

77.2% Canada

17.5% US

5.3% Elsewhere

8.

#### **5yr desire;**

70.8% Canada

19.1% US

5.4% Europe

4.7% Elsewhere

9.

#### **Breakdown of supply;**

75.8% Canada

12.4% Asia

9.45% US

2.35% Elsewhere

10.

#### **5yr desire;**

78.6% Canada

8.6% Asia

8.3% US

4.5% Elsewhere

**11.**

**Domestic sales;**

62.25% province

37.75% other province

**12.**

**5yr desire;**

55.2% province

44.8% other province

**13.**

**Main barriers;**

29.4% Regulatory differences

17.65% Local/provincial procurement policies

17.65% Transportation regulations

35.3% Other

**14.**

**Sales in USA;**

29.8% Region I

17.5% Region V

13.95% Region IV

38.75% Elsewhere

2 responses no sales

**15.**

**Sales in Europe;**

53% Western

18% Eastern

17% Scandinavia

12% Mediterranean

15 responses no sales

**16.**

**Enter foreign markets;**

37.8% Distributors

24.3% Strategic alliance

13.5% Commercial representation office or agency

24.4% Other

**17.**

**Expansion assistance;**

24% Access to financing and grants

24% Participation in trade fairs and trade missions

14% Market research and business intelligence

14% Regulatory compliance and market adaptation

24% Other

**18.**

**Online sales;**

4% of revenue

**19.**

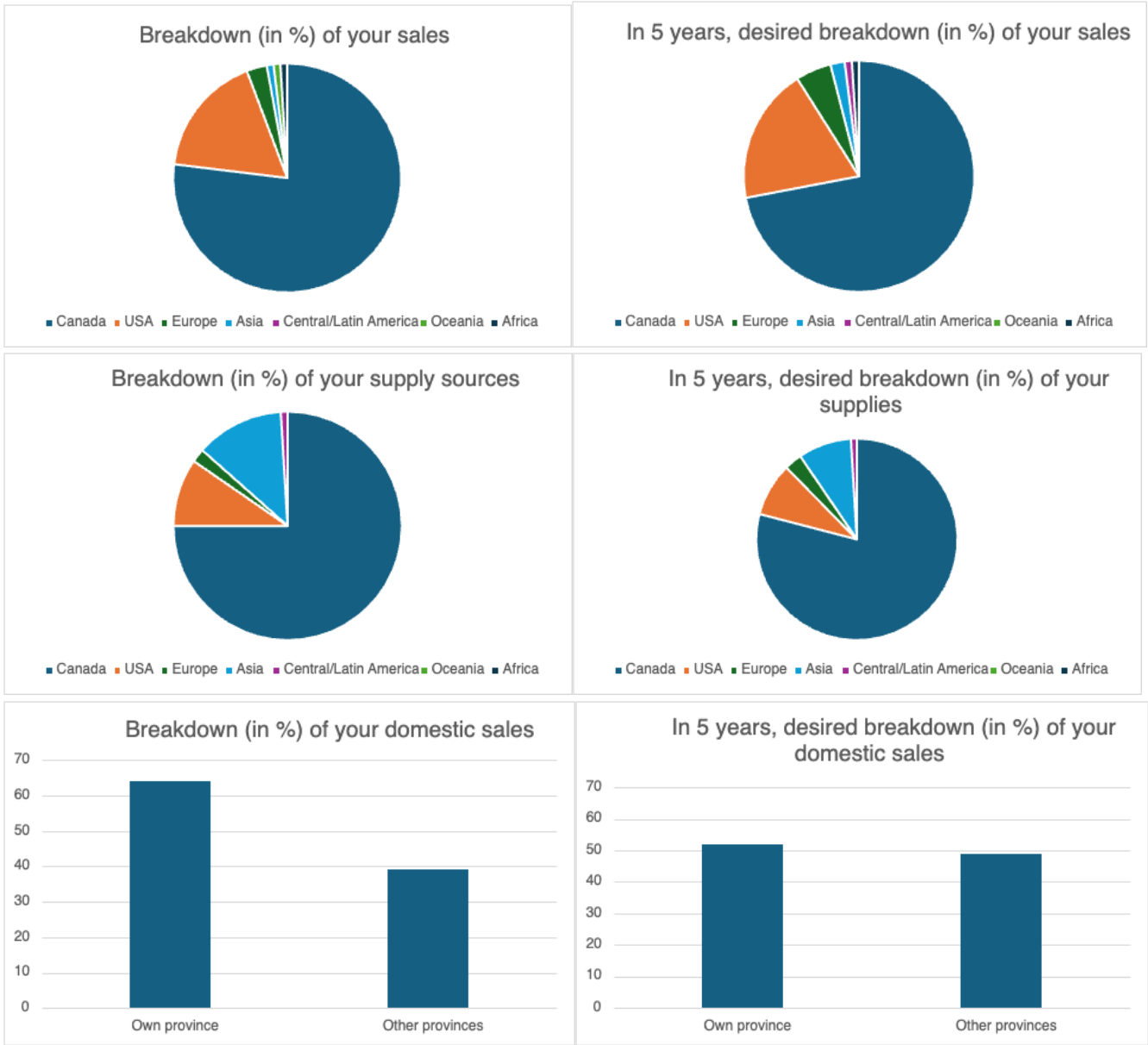
**5yr desire;**

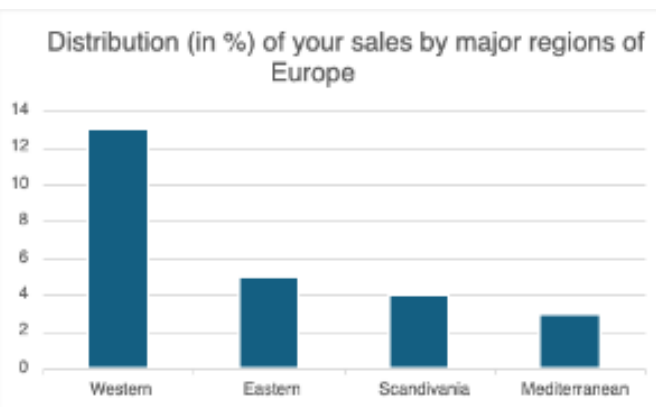
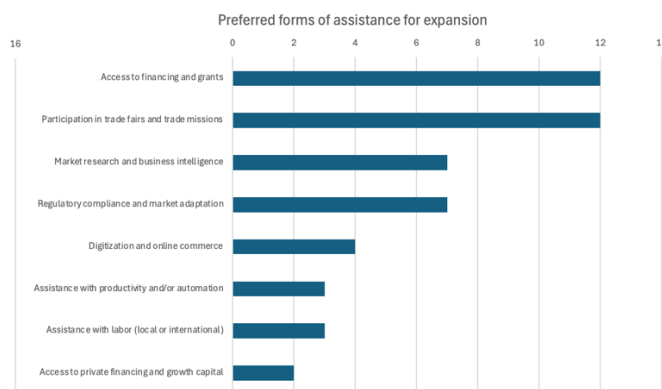
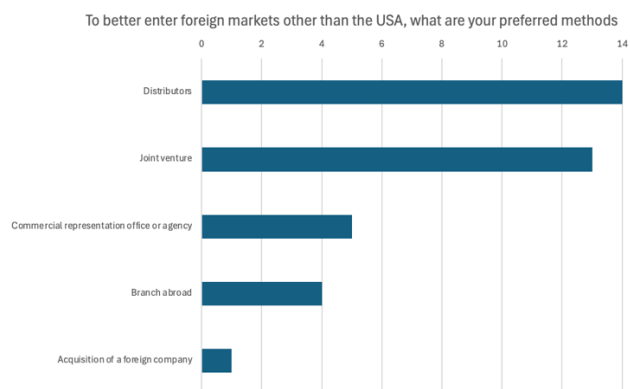
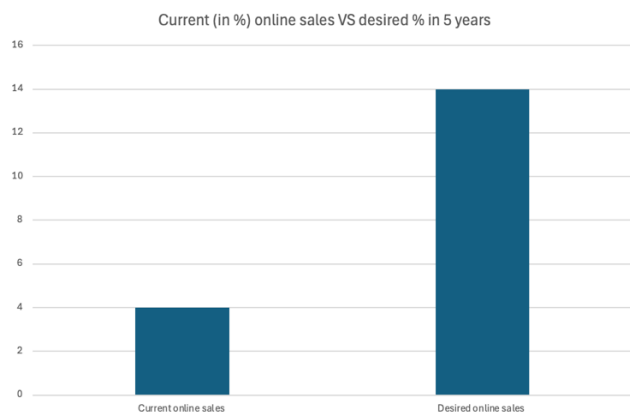
14% of revenue



APPENDIX 4

DATA VISUALS





Region I	Region II	Region III	Region IV	Region V
Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont.	New Jersey, New York, Puerto Rico, US Virgin Islands.	Delaware, District of Columbia, Maryland, Pennsylvania, Virginia, West Virginia.	Alabama, Florida, Georgia, Kentucky, Mississippi, North Carolina, South Carolina, Tennessee.	Illinois, Indiana, Michigan, Minnesota, Ohio, Wisconsin.
Region VI	Region VII	Region VIII	Region IX	Region X
Arkansas, Louisiana, New-Mexico, Oklahoma, Texas.	Iowa, Kansas, Missouri, Nebraska.	Colorado, Montana, North Dakota, South Dakota, Utah, Wyoming.	Arizona, California, Hawaii, Nevada, American Samoa, Guam,	Alaska, Idaho, Oregon, Washington.

			Northern Mariana Islands.	
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## APPENDIX 5

### **PROVINCE BASED RESPONSE ANALYSIS**

Sales rates were primarily dominant in Canada compared to other countries. Quebec respondents demonstrated stronger patriotic tendencies, giving higher percentage rates for both their current and desired sales in Canada. Respondents from other provinces, meanwhile, demonstrated a low but still considerable interest in sales in the United States, along with a desire to explore more growth in that market.

Supply rates were equally as Canada-dominant as sales in all responses. Quebec respondents demonstrated the second-highest interest in the U.S. market, whereas respondents from other provinces currently have higher supply rates in Asia, while expressing a desire to focus more on Canadian suppliers within 5 years.

When observing domestic market sales, Quebec respondents showed much higher current sales rates within their own province, with an increased desire for interprovincial sales in 5 years. Conversely, respondents from other provinces demonstrated higher current sales in other provinces, with a growing interest in sales within their own province in 5 years' time.

When observing sales in the United States, the highest response rate from Quebec respondents was for Region I (Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont), whereas respondents from other provinces had the highest response rate for Region V (Illinois, Indiana, Michigan, Minnesota, Ohio, Wisconsin).

When examining sales in Europe, the highest response rate for both Quebec and other provinces was unanimously for Western Europe. However, the majority of the 15 total respondents indicated no sales in any region of Europe.

Online sales currently accounted for less than 5% of total sales for all respondents, but this figure increased to almost 15% in their desired sales projections over the next 5 years. Quebec respondents showed higher current and desired online sales compared to those from other provinces.

Findings regarding the main barriers to potential market diversification indicated that regulatory differences were the most significant factor affecting manufacturers. Additional comments frequently mentioned transportation regulations.

Findings related to assistance for entering new markets showed that distributors were the most frequently selected support type, with respondents from Quebec also identifying strategic alliances as a close second.

Findings on general assistance for expansion revealed a wide variety of interests. The two highest-ranked factors were access to financing and grants, as well as participation in trade fairs and missions. The second-highest ranked options were market research and business intelligence, particularly noted by respondents from other provinces, as well as regulatory compliance and market adaptation.