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The 3Ds of Indigenous Export Readiness

Demonstration, Durability, and De-risking in Practice

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The Future Skills Centre (FSC) is a forward-thinking centre for research and collaboration dedicated to driving innovation in skills development so that everyone in Canada can be prepared for the future of work. We partner with policymakers, researchers, practitioners, employers and labour, and post-secondary institutions to solve pressing labour market challenges and ensure that everyone can benefit from relevant lifelong learning opportunities. We are founded by a consortium whose members are Toronto Metropolitan University, Blueprint, and Signal49 Research, and are funded by the Government of Canada's Future Skills Program.

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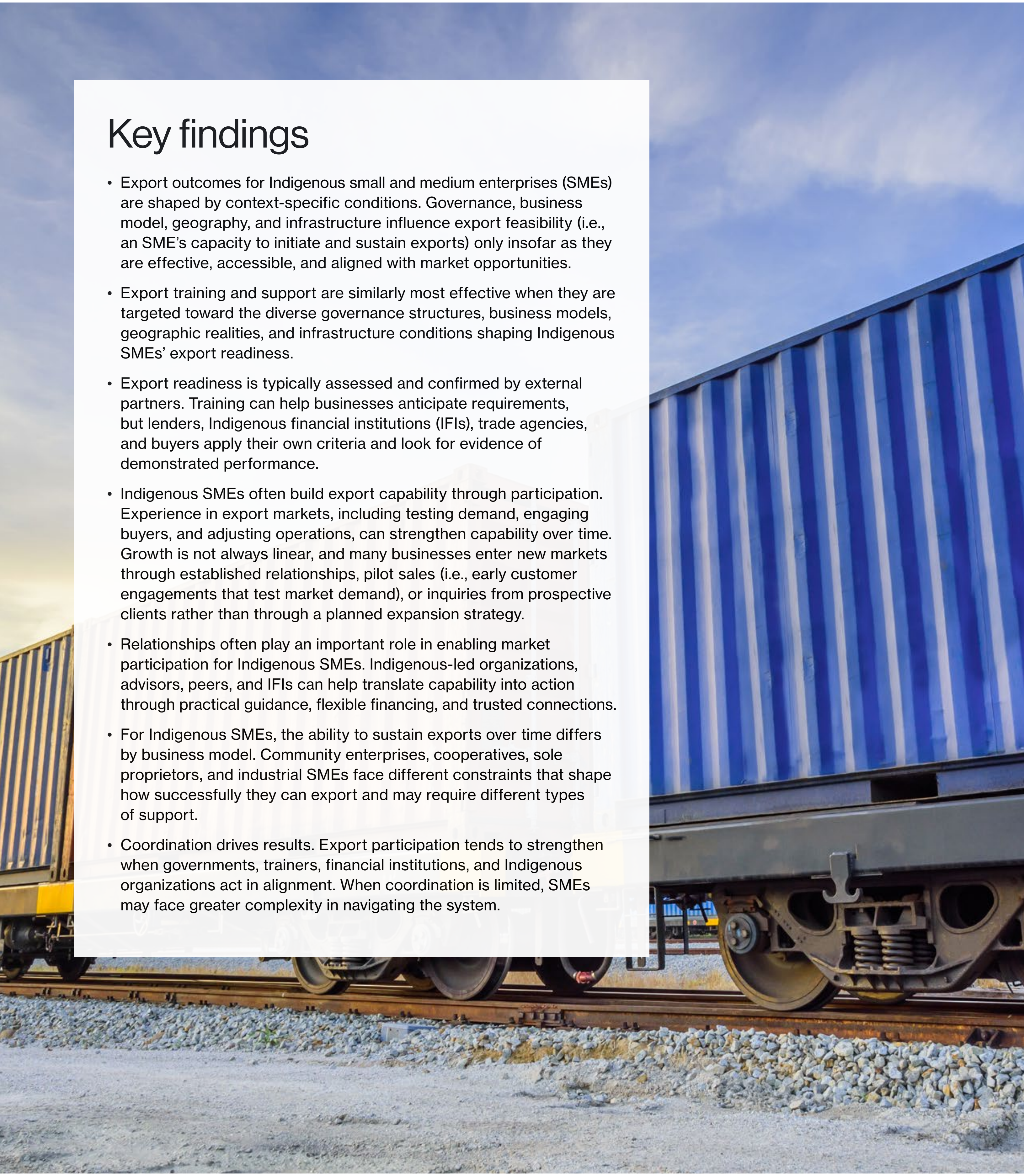
Contents



Key findings

- Export outcomes for Indigenous small and medium enterprises (SMEs) are shaped by context-specific conditions. Governance, business model, geography, and infrastructure influence export feasibility (i.e., an SME's capacity to initiate and sustain exports) only insofar as they are effective, accessible, and aligned with market opportunities.
- Export training and support are similarly most effective when they are targeted toward the diverse governance structures, business models, geographic realities, and infrastructure conditions shaping Indigenous SMEs' export readiness.
- Export readiness is typically assessed and confirmed by external partners. Training can help businesses anticipate requirements, but lenders, Indigenous financial institutions (IFIs), trade agencies, and buyers apply their own criteria and look for evidence of demonstrated performance.
- Indigenous SMEs often build export capability through participation. Experience in export markets, including testing demand, engaging buyers, and adjusting operations, can strengthen capability over time. Growth is not always linear, and many businesses enter new markets through established relationships, pilot sales (i.e., early customer engagements that test market demand), or inquiries from prospective clients rather than through a planned expansion strategy.
- Relationships often play an important role in enabling market participation for Indigenous SMEs. Indigenous-led organizations, advisors, peers, and IFIs can help translate capability into action through practical guidance, flexible financing, and trusted connections.
- For Indigenous SMEs, the ability to sustain exports over time differs by business model. Community enterprises, cooperatives, sole proprietors, and industrial SMEs face different constraints that shape how successfully they can export and may require different types of support.
- Coordination drives results. Export participation tends to strengthen when governments, trainers, financial institutions, and Indigenous organizations act in alignment. When coordination is limited, SMEs may face greater complexity in navigating the system.

Indigenous exports are central to inclusive trade

Growth in Indigenous entrepreneurship

Indigenous entrepreneurship in Canada has expanded rapidly in recent decades. Between 2001 and 2021, the number of Indigenous business owners more than tripled, with Indigenous-owned enterprises now active across construction, natural resources, manufacturing, services, tourism, cultural industries, and digital sectors nationwide.[1]

This growth reflects both the scale and diversity of Indigenous economic activity and the increasing role of Indigenous businesses in regional and national economies.[2]

Despite the gains in business ownership, Indigenous businesses remain underrepresented in export markets. Between 2001 and 2021, total Indigenous self-employment grew by 358 per cent, but self-employment in export-intensive industries grew by only 65.6 per cent, reducing their share of SME exports from Canada from 14.6 to 6.7 per cent.[3] As a result, the Indigenous export rate (7.2 per cent) remains well below the Canadian average (12.1 per cent).[4]

This gap matters now. Exporting can help Indigenous SMEs grow stronger and more stable over time by bringing in new revenue and connecting businesses to larger regional and global markets.[5] Understanding why Indigenous business growth has not yet translated into higher export participation—and what supports could help close that gap—is therefore important for Canada's inclusive trade goals[6] and for advancing Indigenous economic self-determination.[7]

These goals are also reflected in the *National Indigenous Economic Strategy for Canada*, an Indigenous-led framework that emphasizes the role of economic reconciliation in achieving broader reconciliation. The strategy highlights the need for stronger support systems for Indigenous entrepreneurship, including business education and training, mentorship, and access to capital.[8]

1 Statistics Canada, "Census Profile, 2021 Census of Population"; Statistics Canada, "Identifying Indigenous Business Owners and Indigenous-Owned Businesses"; and Chernoff and Cheung, "An Overview of Indigenous Economies within Canada."

2 Business Development Bank, "The growing contribution of Indigenous peoples to the Canadian economy."

3 Signal49 Research, *Mapping Indigenous Export Potential*.

4 Global Affairs Canada and Canadian Council for Aboriginal Business, *Adàwe: Export experiences of Indigenous entrepreneurs*.

5 Organisation for Economic Co-operation and Development (OECD), *Linking Indigenous Communities with Regional Development in Canada*; and Export Development Canada, "Exporter productivity and diversification drive Canada's global growth."

6 Global Affairs Canada, "Canada's approach to inclusive trade."

7 Global Affairs Canada and Canadian Council for Aboriginal Business, *Adàwe: Export experiences of Indigenous entrepreneurs*; and Truth and Reconciliation Commission of Canada, *Honouring the Truth, Reconciling for the Future: Summary of the Final Report of the Truth and Reconciliation Commission of Canada*.

8 National Indigenous Economic Development Board, *The National Indigenous Economic Strategy for Canada: Pathways to Economic Reconciliation*.

Indigenous trade and economic resilience

The growth in Indigenous businesses builds on a long history of Indigenous economic participation. Prior to European contact, Indigenous peoples had well-developed systems of production and trade. Trade networks connected communities across coastal and inland regions of what is now Canada.[9] These systems were later disrupted by colonial policies—including the Indian Act and related regulatory mechanisms—that restricted access to land, capital, and resources. These restrictions created long-lasting barriers to Indigenous participation in the formal economy. Despite these challenges, the Indigenous economy has grown in recent years. Statistics Canada estimates that Indigenous gross domestic income reached $60.2 billion in 2022, showing the growing role of Indigenous workers, businesses, and communities in Canada's economy.[10] Economic studies also suggest that closing gaps in economic participation between Indigenous and non-Indigenous people could increase Canada's GDP by about 1.5 per cent each year.[11] Canada's 2025 GDP was about $2.28 trillion.[12]

9 Stopp, "The Inuit Co-Operative Movement in Northern Canada, 1959–1968."
10 Statistics Canada, *The Daily: Indigenous Peoples Economic Account, 2022.*
11 Fiscal Realities Economists, *Economic Reconciliation: Growing Canada's Economy.*
12 International Monetary Fund, *World Economic Outlook Database, October 2025.*

Where Indigenous SMEs operate—by sector

The majority of Indigenous-owned enterprises are concentrated in construction, natural resources, and services, often serving domestic or regional markets.[13] Yet a growing subset of these businesses operates in export-oriented industries, including fisheries, cultural production, digital services, and tourism.[14]

Service and culture-based exports, particularly Indigenous tourism, are an important but often underdocumented part of Indigenous export activity. Sector analysis we conducted in 2025 shows that Indigenous tourism enterprises generate economic impacts through domestic and international markets but that their participation in export markets is often impeded by infrastructure, capacity, and market access constraints.[15]

Approximately 10 per cent of Indigenous-owned businesses operate within Canada's most export-oriented industries, with many others active in sectors that show export potential.[16] In this report, export intensity refers to the share of total industry revenues derived from export sales. Industries are grouped into two categories: export intensive (approximately 40 to 49 per cent of revenues from exports) and export oriented (50 per cent or more of revenues from exports).[17] Applying this classification, roughly 10 per cent of Indigenous businesses operate in export-oriented industries, while many others are active in export-intensive sectors such as agriculture, fishing, hunting, tourism, manufacturing, clothing and textiles, and oil and gas extraction.[18] There is clearly room to grow the exports of Indigenous businesses in many sectors. So, what is holding them back?

13 Crown-Indigenous Relations and Northern Affairs, "Business and reconciliation."
14 Crown-Indigenous Relations and Northern Affairs, "Impact of the Inuit Arts Economy."
15 Landry and Heschl, *Indigenous Tourism Sector Impact in Canada.*
16 Fiser, *What Are the Business Characteristics of Indigenous Exporters in Canada?*
17 Signal49 Research, *Mapping Indigenous Export Potential.*
18 Signal49 Research.

How export participation varies across regions and identity groups

The restrictions aren't due to a lack of potential benefits. Expanding Indigenous participation in export markets could help diversify regional economies while also building long-term business capacity.[19] Export activity encourages skills transfer, digital adoption, and management innovation within Indigenous SMEs, supporting sustainable enterprise development.[20]

Regional variation is also evident. Indigenous businesses tend to be concentrated in industries that reflect the economic structure of their surrounding regions.[21] For example, Indigenous businesses in Atlantic Canada are more active in export-intensive sectors such as fisheries, while those in the Prairie provinces are more likely to participate in oil and gas industries.[22]

Export participation among Indigenous SMEs varies across identity groups and reflects differences in sectors where these businesses operate. First Nations–owned businesses are more common in construction and primary industries (e.g., natural resources, forestry, and fishing). Métis-owned businesses are more often found in manufacturing and in professional or technical services (e.g., engineering, consulting, and scientific services). Inuit-owned businesses are more active in resource-based and northern service sectors (e.g., mining support services, transportation, and logistics).[23]

More broadly, while Indigenous and non-Indigenous SMEs share some structural similarities, they differ in ownership models, scale (i.e., size of business), and the industries they work in. These differences can affect how they take part in export markets. Indigenous businesses are more likely to operate in industries tied to local resources, community needs, or cultural activities,[24] whereas nonIndigenous SMEs are more widely distributed across service and manufacturing sectors.[25] These differences influence the types of goods and services exported and the pathways Indigenous businesses take to engage in international markets.

Structural differences help explain part of the gap in export participation. However, the industries in which businesses operate do not fully determine whether they export. SMEs must also have the skills, resources, and market connections needed to compete internationally. To understand how Indigenous businesses can enter export markets, it is important to look at the idea of export readiness.

Understanding Indigenous export readiness

Operating in an export-oriented sector does not automatically lead to export participation. Indigenous SMEs must also demonstrate that they can reliably meet the operational, financial, and regulatory requirements associated with international trade.[26] This is commonly described as *export readiness*.

Export readiness is not self-declared; it is assessed externally. Lenders, buyers, and trade agencies assess whether a business has demonstrated the reliability, operational stability, and financial capacity required to fulfill export contracts and manage the risks associated with cross-border trade.[27] These assessments rely primarily on observable evidence rather than stated intentions or participation in export training programs. In practice, this means demonstrating the ability to meet delivery timelines, comply with regulatory and documentation requirements, and secure the working capital needed to cover production and shipping costs before payment is received.

19 First Nations Financial Management Board (FMB), *RoadMap to Indigenous Economic Growth*.
20 Nowlin, "Indigenous Capitalism and Resource Development in an Age of Climate Change: A Timely Dance with the Devil?"
21 Bélanger Baur, *Indigenous-Owned Exporting Small and Medium Enterprises in Canada*.
22 Bélanger Baur.
23 Bélanger Baur.
24 Canadian Council for Aboriginal Business (CCAB), "Promise and Prosperity: The 2020 Ontario Aboriginal Business Survey."
25 Innovation, Science and Economic Development Canada, "Key Small Business Statistics – 2021."
26 Canadian Council for Indigenous Business and Global Affairs Canada, Office of the Chief Economist, *Atāmitowin: Identifying and overcoming challenges facing Indigenous exporters*.
27 Canadian Council for Indigenous Business and Global Affairs Canada, Office of the Chief Economist.

It is helpful to understand the difference between skills, capability, and readiness, which represent different steps toward exporting. *Skills* refer to the basic knowledge needed for trade, such as setting prices, planning shipping (i.e., logistics), completing documents, and managing cash flow. *Capability* means being able to use these skills in real situations, such as working with buyers, meeting regulations, and managing logistics. *Readiness* is different. It means that outside partners (e.g., banks, investors, export agencies, trade commissioners) decide that a business has shown enough stability and performance to receive financing, join trade programs, or be introduced to new markets.

How this study examines Indigenous export readiness

To examine how export readiness develops, this study combined a review of literature and policy documents with case profiles and interviews. We reviewed Canadian and international research on Indigenous entrepreneurship and export development, including analyses of export participation, skills, and ecosystem supports. We developed profiles of six Indigenous businesses that have successfully entered international markets and conducted interviews with business leaders, financial institutions, trade support organizations, and government representatives. Secondary data analysis was also used to understand patterns in Indigenous business participation across export-intensive sectors. Further methodological detail is provided in Appendix A.

Indigenous-specific ecosystems shape export pathways

Sector patterns and regional differences show where Indigenous SMEs are active and how closely those sectors are linked to export markets. However, these patterns alone do not fully explain why Indigenous export participation is lower than the national average. Export activity is also shaped by the systems that support businesses, including governance structures, access to financing, infrastructure, and institutional support.

These ecosystem conditions influence how businesses evaluate export opportunities, manage risk, and demonstrate reliability to external partners such as buyers, lenders, and trade agencies. To understand Indigenous export readiness, it is important to look not only at business characteristics but also at the systems around them. These systems shape how businesses enter and continue participating in international markets.

How governance and business models interact to shape export pathways

Indigenous SMEs do not export through a single system. Exporting takes place in business environments shaped by various systems and conditions, such as governance, business models, geography, relationships, and support organizations.[28] These environments differ across First Nations, Métis, and Inuit contexts and influence how businesses assess opportunities, manage risk, and access export-related supports.[29] In many cases, Indigenous businesses operate across several systems at once, including community governance, regional institutions, and national trade programs.[30]

28 Global Affairs Canada and Canadian Council for Aboriginal Business, *Adàwe: Export experiences of Indigenous entrepreneurs*.
29 Bélanger Baur, *Indigenous-Owned Exporting Small and Medium Enterprises in Canada*.
30 Global Affairs Canada, “International trade agreements and Indigenous peoples: The Canadian approach.”

Export outcomes are shaped by these systems and conditions, not only by a business's goals or ambition. Governance, industry focus, and infrastructure can affect whether exporting is possible. At the same time, export support programs are often spread across different organizations.[31] To understand export readiness, it is important to look at how these systems shape business decisions and risk management.

Governance shapes decision-making and risk

Governance structures vary across Indigenous business models. Many businesses operate under community-owned or First Nation–linked structures. In these cases, leadership, boards, or councils participate in key decisions.[32] These structures create accountability to the community and can influence how quickly businesses pursue new opportunities.[33]

Interview participants often described export decisions as being shaped by collective responsibility. One Métis exporter explained: "You're not just deciding for yourself—there's a responsibility to the community and to leadership, and that affects how fast you move."[34] Sarain Lafond, Executive Director of Saskatchewan Indigenous Enterprise Foundation Inc.,[35] described a similar dynamic, noting that his "first responsibility is to the community members ... especially since the organization is owned by all 75 First Nations in Saskatchewan."[36]

This dynamic does not prevent exporting, but it can affect pacing, risk tolerance, and sequencing. Privately owned SMEs may make decisions more quickly, while community-owned enterprises may prioritize stability, employment, or long-term sustainability when evaluating expansion into global markets.

Business models shape export feasibility

Statistics Canada data shows that Indigenous-owned SMEs are distributed across a range of sectors,[37] and some analyses indicate relatively higher representation in areas such as arts, entertainment and recreation, and information and culture compared with the average Canadian SME, with differing patterns of export propensity across sectors.[38]

Many Indigenous SMEs are often place based and tied to local or regional demand. As a result, exporting is not always an immediate goal or a practical next step.

An Indigenous financial institution representative from Tale'awtxw Aboriginal Capital Corporation (TACC)[39] in West Vancouver, British Columbia, explained that "very few of our clients are exporters." They noted that businesses producing physical goods face added requirements if they want to export, including producing at a larger scale and meeting certification, standards, and logistics requirements.[40] Sector can therefore strongly influence whether exporting is realistic and what it takes for a business to be considered export ready.[41]

How geography and infrastructure systems shape export pathways

Indigenous SMEs operate in many different geographic settings, and these locations affect their ability to export. Geography affects how easily businesses can reach markets. Infrastructure also matters. Transportation systems, internet and communications, and regulatory alignment all affect whether businesses can export consistently.[42]

31 Canadian Council for Indigenous Business and Global Affairs Canada, Office of the Chief Economist, *Atāmitowin: Identifying and overcoming challenges facing Indigenous exporters*.

32 Minister of Indian Affairs and Northern Development, *Aboriginal Cooperatives in Canada: Case Studies*.

33 Conference Board of Canada, The, *Indigenous Ownership and Economic Autonomy in Canada*.

34 Interview, Anthony Wingham, Co-founder and Chief Operating Officer, Nuez Acres (supported by Métis Nation of British Columbia), 2026. See Case Illustration 1 in Appendix C.

35 Saskatchewan Indigenous Enterprise Foundation Inc. (SIEF), "About SIEF."

36 Interview, Sarain Lafond, Executive Director, Saskatchewan Indigenous Enterprise Foundation Inc, 2026.

37 Statistics Canada, "Identifying Indigenous Business Owners and Indigenous-Owned Businesses."

38 Global Affairs Canada and Canadian Council for Aboriginal Business, *Adàwe: Export experiences of Indigenous entrepreneurs*.

39 Tale'awtxw Aboriginal Capital Corporation (TACC), "About TACC."

40 Interview, Brian Gillespie, Business Services Officer, Tale'awtxw Aboriginal Capital Corporation, 2026.

41 Global Affairs Canada and Canadian Council for Aboriginal Business, *Adàwe: Export experiences of Indigenous entrepreneurs*.

42 Statistics Canada, "Census Profile, 2021 Census of Population"; and Canadian Council for Indigenous Business and Global Affairs Canada, Office of the Chief Economist, *Atāmitowin: Identifying and overcoming challenges facing Indigenous exporters*.

These conditions vary widely across northern, rural, and urban Indigenous communities.[43]

As a result, export outcomes depend on more than the industry in which a business operates or the goals of the business owner. They are also shaped by reliability, transportation costs, connectivity, and how well regulations align across markets.[44] Research on SME exports shows that logistics systems and compatible regulations help businesses deliver products reliably, build long-term export relationships, and give buyers and lenders confidence that orders can be completed.[45]

Remoteness shapes logistics and delivery risk

In northern regions, remoteness—defined by distance from major markets and reliance on air or seasonal marine transport—shapes how businesses participate in export markets.[46] Describing conditions in Nunavik, Quebec, Andy Moorhouse, Vice-President of Economic Development at Makivvik Corporation,[47] explained that “all 14 Nunavik communities are fly-in only, with no road or ice-road access,” underscoring the reliance on air transport. He explained that these conditions increase shipping costs, extend delivery timelines, and constrain which sectors can reliably export.[48]

Ana Camila Farias, an Economic Development Officer at Makivvik Corporation, emphasized that exporting is not an automatic objective for businesses in Nunavik. It may become viable over time, but only after local infrastructure, capacity, and support systems are strengthened. She described export readiness as being shaped by improvement in structural conditions, including financial and transportation infrastructure, early-stage business capacity, and the availability to create programs that are culturally grounded and of relationship-based support.[49] In this context, export success depends heavily on reliable delivery despite transportation challenges. High shipping costs and seasonal disruptions can make it harder for businesses to maintain export relationships over time. Buyers often rely on clear communication and coordination among local institutions and logistics providers to feel confident that orders will be delivered as expected.[50]

Urban proximity alters the constraint structure

In urban contexts—where businesses have road access, integrated freight systems, and closer proximity to major markets—geographic constraints operate differently.[51] Proximity to freight networks and trade corridors reduces transportation risk and allows export logistics to integrate into routine operations. However, urban reserve businesses may face different forms of institutional friction. Program eligibility, incorporation requirements, and financing mechanisms frequently assume municipal or provincial governance structures, which may not align with onreserve governance realities.[52] In these settings, businesses may find it easier to build credibility with buyers because they are closer to markets and transportation networks. However, maintaining export relationships and securing financing can still depend on whether programs, regulations, and financing tools recognize Indigenous governance structures.

43 Conference Board of Canada, The, *Research Module 1: Aboriginal Entrepreneurship in Canada*.

44 Organisation for Economic Cooperation and Development (OECD), *SME and Entrepreneurship Policy: Learning by Exporting*; and Global Affairs Canada and Canadian Council for Aboriginal Business, *Adàwe: Export experiences of Indigenous entrepreneurs*.

45 Organisation for Economic Cooperation and Development (OECD), *Enhancing the Contributions of SMEs in a Global and Digitalised Economy*; Canadian Council for Indigenous Business and Global Affairs Canada, Office of the Chief Economist, *Atāmitowin: Identifying and overcoming challenges facing Indigenous exporters*; and Gresch and others, *Business in the North: Do Indigenous Entrepreneurs Have the Support They Need to Succeed?*

46 Inuit Tapiriit Kanatami, “Nunavut’s Infrastructure Gap”; and Inuit Tapiriit Kanatami, “Arctic and Northern Policy Framework: Inuit Nunangat.”

47 Makivvik Corporation, “*Makivvik*. Kuujjuaq, QC: Makivvik.”

48 Interview, Andy Moorhouse, Vice President, Economic Development, Makivvik Corporation, 2026.

49 Interview, Ana Camila Farias, Economic Development Officer, Makivvik Corporation, 2026.

50 Inuit Tapiriit Kanatami, “Arctic and Northern Policy Framework: Inuit Nunangat”; National Aboriginal Capital Corporations Association (NACCA), *Strengthening Indigenous Businesses: The Role of Indigenous Financial Institutions*; Bélanger Baur, *Indigenous-Owned Exporting Small and Medium Enterprises in Canada*; and Makivvik Corporation, *Annual Report 2023–2024*.

51 Bélanger Baur, *Indigenous-Owned Exporting Small and Medium Enterprises in Canada*; Statistics Canada. “Census Profile, 2021 Census of Population”; and Canadian Council for Indigenous Business and Global Affairs Canada, Office of the Chief Economist, *Atāmitowin: Identifying and overcoming challenges facing Indigenous exporters*.

52 Ontario Chamber of Commerce and Canadian Council for Indigenous Business, *A Way Forward: Ontario’s Path Towards Economic Reconciliation, Equity and Inclusive Growth—Part II: Finance and Capital*.

The role of training and support institutions in the export ecosystem

Research on the Indigenous skills ecosystem suggests that access to training and support remains uneven across Canada. A national mapping exercise conducted by the Canadian Council for Indigenous Business (CCIB) identified gaps in available training and skills development opportunities for Indigenous peoples while also emphasizing the importance of mentorship, networking, and funding supports for strengthening entrepreneurship and economic participation.[53]

Training and support organizations play a distinct role in building foundational export skills, including pricing, contract interpretation, logistics planning, documentation, standards compliance, and cash flow management.[54] Several interviewees emphasized that foundational skills training becomes useful when businesses can find it, interpret it within their governance and sector context, and combine it with other forms of support.

Mainstream training providers such as the Forum for International Trade Training (FITT)[55] offer introductory sessions and online modules intended to build familiarity with export concepts. FITT staff noted, however, that these programs do not always connect effectively with Indigenous business networks, even when offered free of charge.[56] A similar pattern was described by Invest Nova Scotia[57]—Nova Scotia's business development agency—where staff observed that many Indigenous owners are unfamiliar with the organization and the support it offers.[58] Together, these experiences suggest that awareness and access gaps reflect coordination challenges within the broader export support ecosystem rather than the actions of any single organization or a lack of interest among businesses.

Indigenous-led organizations help address these navigation and visibility gaps by providing entry points to export support programs, interpretation, and relationship-based guidance that make skills development usable in practice.

The CCIB is one such intermediary organization. CCIB provides focused learning opportunities, curated resources, and convening functions that help Indigenous SMEs locate relevant training, understand its purpose, and connect it to broader opportunities in the business ecosystem.[59]

Indigenous financial institutions and organizations like Waubetek Business Development Corporation[60] play a complementary role. In addition to financing business start-up and growth, their General Manager, Dawn Madahbee Leach, explained that they provide hands-on navigation support, helping entrepreneurs identify appropriate programs, understand requirements, complete applications, refine export plans, and align decisions with governance structures and sector realities.[61]

Other programs offering effective support include coordinated "one-stop" models—whether advisor-based systems like British Columbia's Export Navigator[62] or program-bundled approaches supported by Atlantic Canada Opportunities Agency[63] (ACOA) in Atlantic Canada—help Indigenous businesses integrate skills training with export planning and market development in a single, navigable pathway. Business owners and senior staff interviewees described these models as effective because they reduce fragmentation, link training to practical next steps, and provide guided entry points into what can otherwise be a dispersed

53 Canadian Council for Indigenous Business and Future Skills Centre. *Readiness and Resilience: Mapping the Contours of the Indigenous Skills and Employment Ecosystem in Canada*.

54 Global Affairs Canada, *Step-by-Step Guide to Exporting*; and Global Affairs Canada, "Trade Commissioner Service."

55 Forum for International Trade Training (FITT), "About FITT."

56 Interview, Lora Rigutto, Partnerships and Community Lead, FITT, 2025.

57 Invest Nova Scotia, "Export Development and Trade."

58 Interview, Carolyn Clegg, Business Growth Executive and Tamasha Fernando, Export Development Executive, Invest Nova Scotia, 2026.

59 Interview, Matthew Foss, Vice-President of Research and Public Policy, Canadian Council for Indigenous Business, 2025.

60 Waubetek Business Development Corporation, "About Us."

61 Interview, Dawn Madahbee Leach, General Manager, Waubetek Business Development Corporation, 2026.

62 Government of British Columbia, "Export Navigator."

63 Atlantic Canada Opportunities Agency (ACOA). "Programs and initiatives."

support landscape. Research conducted by Global Affairs Canada also finds that training is most effective when it is part of a coordinated pathway rather than a stand-alone input.[64]

Training is only one component of the export ecosystem.[65] Mainstream providers offer basic trade training, but these services do not always reach Indigenous entrepreneurs or fit their governance structures. Indigenous-led organizations help bridge this gap. They guide businesses through program selection, application processes, financing options, and export planning in ways that reflect community governance and cultural context. By doing this, they help reduce uncertainty for lenders and partners. They support businesses in understanding requirements, completing applications accurately, and developing stronger export plans.

Economic development officers play a key role in the ecosystem infrastructure

Economic development officers (EDOs) play an important role in Indigenous business ecosystems. They act as local advisors who help support business and economic growth in their communities.[66] In many First Nations communities, EDO positions are funded through federal economic development programs managed by Indigenous Services Canada. In the territories, similar roles are supported through programs delivered by the Canadian Northern Economic Development Agency (CanNor). This agency works with Indigenous governments, development corporations, and regional organizations to strengthen economic capacity in northern communities.

Inuit and Métis organizations also employ economic development staff through regional corporations, development corporations, and land claim institutions. These staff members provide business advice and help coordinate local economic development.[67]

The Council for the Advancement of Native Development Officers (Cando) is a national Indigenous professional association that supports EDOs through training, certification, and networking. However, the organization does not employ EDOs directly.[68]

Interview findings indicate that EDOs connect entrepreneurs to export training, financing programs, and trade supports. However, Cando's Communications Director, Paul Macedo, noted that many EDOs manage broad portfolios that extend beyond export development, including infrastructure planning and general business advisory services.[69] National reporting similarly finds that not all First Nations communities have access to full-time economic development staff and that funding structures can affect hiring and retention.[70]

When EDO capacity is limited, businesses may find it harder to connect with export programs. This can also affect how confident lenders and trade partners feel when working with them. EDOs often help interpret program requirements, organize documents, and connect businesses with appropriate supports. These activities can reduce uncertainty for lenders and trade partners. When staffing is limited, this support may also be limited, making it harder for businesses to meet program requirements.[71]

64 Bélanger Baur, *Indigenous-Owned Exporting Small and Medium Enterprises in Canada*.

65 National Indigenous Economic Development Board, "Release of the NIEDB's 2024–2027 Strategic Plan."

66 Council for the Advancement of Native Development Officers (Cando), *Orientation to the Occupation of Indigenous Economic Development Officer*.

67 Indigenous Services Canada, "Community Opportunity Readiness Program (CORP) – Program Guidelines."

68 Council for the Advancement of Native Development Officers, "About Cando."

69 Interview, Paul Macedo, Communications Director, Council for the Advancement of Native Development Officers (Cando), 2026.

70 Council for the Advancement of Native Development Officers (Cando), *Written Brief to the Standing Committee on Indigenous and Northern Affairs for the Report on Barriers to Indigenous Economic Development*.

71 Conference Board of Canada, The, *Aboriginal Entrepreneurship in Canada*; and National Aboriginal Capital Corporations Association (NACCA), *Strengthening Indigenous Businesses: The Role of Indigenous Financial Institutions*.

Indigenous-led research strengthens the export ecosystem

Research also plays an important role in strengthening export ecosystems. It provides evidence that helps businesses and institutions understand how governance, geography, and markets can be leveraged to support exporting activities.[72]

In Nunavik, the Vice-President of Makivvik Corporation highlighted the role of resource and market studies—from assessing marine stocks to identifying viable international buyers—in expanding export opportunities. Research also helps align decisions about exporting with Inuit priorities, values, and remote Arctic conditions.[73]

At the national level, CCIB produces Indigenous-specific business data, sector profiles, and case studies to help exporters and governments understand where opportunities exist and how export support programs should be delivered.[74]

Federal regional development agencies (RDAs) also support research. For example, CanNor focuses on the territories, while the Federal Economic Development Agency for Northern Ontario (FedNor) focuses on Northern Ontario. These agencies study northern markets, infrastructure, sector opportunities, and resource-based opportunities that can inform decisions of Indigenous business owners.

Research alone does not make an Indigenous business ready to export. However, it helps businesses and institutions understand where export opportunities exist and what conditions are needed to pursue them. Market studies can clarify whether demand for a product exists and whether production can grow under local conditions. By identifying viable buyers, infrastructure requirements, and sector limits early, research helps reduce uncertainty at the ecosystem level and helps businesses and institutions make more informed decisions about next steps.

From skills to capability—and capability to readiness

Export participation develops in stages. Indigenous SMEs first learn the basic skills needed for trade. They then build experience by working in real markets. After that, external partners assess whether the business is ready to export.[75]

Studies show that many SMEs do not enter international markets fully prepared. Instead, businesses often improve their productivity and managerial sophistication through the process of exporting. Researchers call this “learning by exporting.”[76] Research on Indigenous exporters in Canada shows a similar pattern. Export development often happens step by step and is built through relationships rather than through a single program.[77] Kingson Lim, Manager of Strategic Indigenous Engagement at Global Affairs Canada, also describes export development as a relationship-dependent process, explaining that SMEs advance more effectively when they maintain regular contact with trade commissioners.

72 Karagkouni and Dimitriou, “Barriers and Initiatives to Access International Market for European Cross-Border Regions.”

73 Interview, Andy Moorhouse, Vice-President, Economic Development, Makivvik Corporation, 2026.

74 Interview, Matthew Foss, Vice-President, Research and Public Policy, Canadian Council for Indigenous Business, 2025.

75 Organisation for Economic Cooperation and Development (OECD), *SME and Entrepreneurship Policy: Learning by Exporting*; and Global Affairs Canada, “Trade policy and small and medium-sized enterprises.”

76 Organisation for Economic Cooperation and Development (OECD), *SME and Entrepreneurship Policy: Learning by Exporting*.

77 Global Affairs Canada and Canadian Council for Aboriginal Business, *Adàwe: Export experiences of Indigenous entrepreneurs*; and Canadian Council for Indigenous Business and Global Affairs Canada, Office of the Chief Economist, *Atāmitowin: Identifying and overcoming challenges facing Indigenous exporters*.

Trade commissioners can introduce businesses to buyers, clarify expectations, and help interpret foreign market contexts.[78]

In Indigenous business contexts, readiness depends on more than business skills. Governance structures, access to financing, networks, and support programs also play a role.[79] Because of this, readiness is not something a business declares on its own. It is a point-in-time judgment made by lenders, IFIs, trade promotion agencies, and buyers who assess whether sufficient evidence, stability, and risk management are present to justify expansion.[80]

The 3Ds lens for understanding export readiness

Export readiness is not self-declared. It is recognized when external partners, such as lenders, IFIs, trade agencies, and buyers, judge that a business has the capacity to fulfill export commitments and manage the risks associated with international trade.[81] These judgments are typically based on observable evidence, including operational performance, financial stability, and the ability to meet regulatory and delivery requirements.

Interviews and literature reviewed for this study suggest that these assessments often focus on three recurring questions. Can the business reliably deliver what it promises? Can it sustain operations over time? And are there arrangements in place that reduce risk for partners?

To describe these recurring elements, this study uses a simple analytical framework referred to as the **3Ds lens:** *Demonstration*, *Durability*, and *De-risking*. The lens provides a structured way to explain how export readiness is evaluated across different Indigenous business models and export pathways.

The 3Ds of Indigenous Export Readiness

Export readiness is commonly assessed through three dimensions:

- ***Demonstration*:** Proof that the business can deliver as promised and evidence that operations function reliably under current conditions (e.g., completed export shipments, repeat international orders, meeting required product or food safety standards, documented on-time delivery).
- ***Durability*:** Evidence that the business can sustain operations and finances over time (e.g., multi-year buyer relationships, stable revenues across seasons, secured supply licences or long-term supply agreements, retained earnings or reinvestment capacity).
- ***De-risking*:** Specific arrangements that limit financial, regulatory, or delivery risk for buyers and lenders (e.g., letters of credit or confirmed lines of financing, insurance coverage, advance payment terms, an intermediary managing customs documentation and compliance).

These dimensions answer different questions.

Demonstration asks, *Can the business deliver?*
Durability asks, *Can it keep delivering?*
De-risking asks, *What protects partners if something goes wrong?*

78 Interview, Kingson Lim, Manager, Strategic Indigenous Engagement, Global Affairs Canada, 2026.

79 National Aboriginal Capital Corporations Association (NACCA), *Strengthening Indigenous Businesses*; and Bélanger Baur, *Indigenous-Owned Exporting Small and Medium Enterprises in Canada*.

80 See Signal49 Research's case illustrations in Appendix C.

81 Canadian Council for Indigenous Business and Global Affairs Canada, Office of the Chief Economist, *Atāmitowin: Identifying and overcoming challenges facing Indigenous exporters*.

The 3Ds lens does not assume that export readiness looks the same across all businesses or appear the same across all Indigenous business models. In cooperative systems and community-owned enterprises, readiness may be assessed at the institutional level rather than at the level of individual producers.[82] In privately owned SMEs, readiness is typically assessed at the business level, based on financial records, management capacity, and operational track record.[83] In service-based sectors such as tourism or digital services, readiness may be demonstrated through completed projects, repeat contracts, and client references rather than physical inventory or shipping systems.[84]

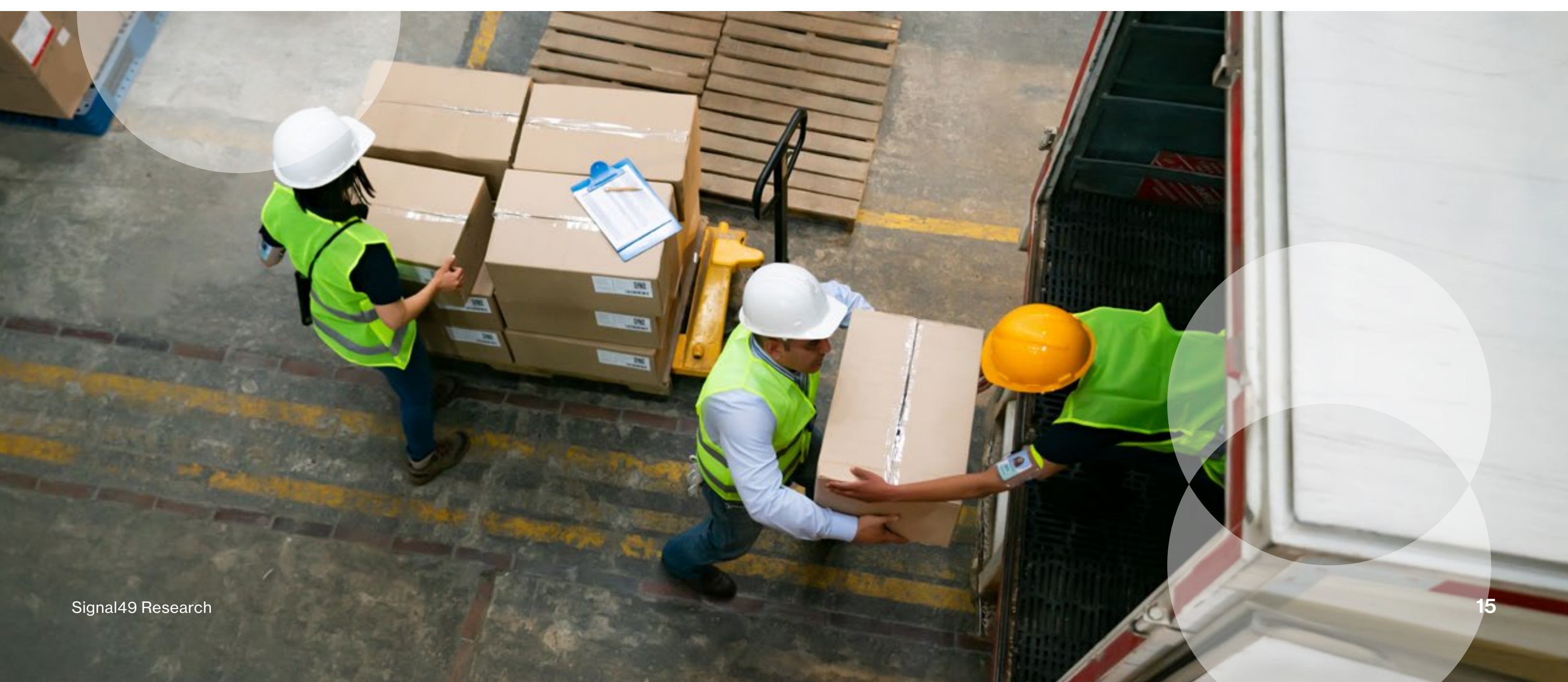
The 3Ds lens was developed for this study based on recurring themes in interviews and Canadian and international export literature. It provides a structured way to describe how export readiness is assessed across different Indigenous business models, sectors, and regions.

The case studies that follow illustrate how *Demonstration*, *Durability*, and *De-risking* emerge in practice across different Indigenous business models and export pathways. These cases were selected because the companies have successfully entered or sustained export activity, which allows us to see how export readiness develops in practice. The study does not include examples of businesses that attempted to export but were unsuccessful. Instead, the cases highlight what has worked and what conditions helped these businesses participate in international markets. Together, they reflect a range of sectors, governance structures, locations, and business models through which Indigenous SMEs engage in exporting.

82 Organisation for Economic Cooperation and Development (OECD), *Linking Indigenous Communities with Regional Development in Canada*; and Innovation, Science and Economic Development Canada, “Understanding cooperatives: How they work, types and contributions.”

83 Canadian Council for Indigenous Business and Global Affairs Canada, Office of the Chief Economist, *Atāmitowin: Identifying and overcoming challenges facing Indigenous exporters*.

84 Landry and Heschl, *Indigenous Tourism Sector Impact in Canada*; and Global Affairs Canada and Canadian Council for Aboriginal Business, *Adàwe: Export experiences of Indigenous entrepreneurs*.



Nuez Acres®: Export readiness through opportunity and support

The Nuez Acres[85] case illustrates how export participation developed through *Demonstration*, *Durability*, and *De-risking* following an unsolicited U.S. retail order.[86] Among the three dimensions, *De-risking* is the most strongly reflected in this case.

Nuez Acres: From farmers' markets to international shelves

Nuez Acres is a majority Métis-owned skin care company based in Langley, British Columbia. Founded in 2019, it produces waterless, pecan-based serums and oils. The company initially sold through farmers' markets and local channels before shifting to e-commerce and wholesale distribution during the COVID19 pandemic. It later secured national retail distribution with a major Canadian retailer and met required regulatory and labelling standards. Exports account for approximately 10 per cent of revenue and are primarily order based. The company entered the U.S. market after receiving an unsolicited large retail order. Fulfilling that order required producing inventory before payment and meeting additional cross-border requirements. Indigenous entrepreneurship programs and financing from TACC provided capital and advisory support during this period. The case examines how the firm entered export markets without a formal long-term international strategy—a pattern often described in export literature as reactive or accidental exporting.[87]

Demonstration

Before entering the U.S. market, the firm secured Health Canada compliance, obtained UPC codes, and placed products in 241 Walmart Canada stores. It supplied national retail volumes and met labelling requirements. This domestic retail experience provided documented evidence of production capacity and regulatory compliance when the U.S. retailer placed its order.

Durability

Fulfilling the U.S. order required the firm to produce inventory prior to payment and to meet additional labelling, equipment, and border requirements. Marketing and compliance costs increased while revenue remained outstanding. With two full-time staff and limited working capital, management had to coordinate production, financing, and regulatory adjustments within compressed retail timelines. The company's existing retail operations, including established production processes, regulatory compliance experiences, and national distribution through Walmart Canada, provided the operational foundation needed to manage these pressures and complete the order.

De-risking

De-risking is most visible in this case through the financial and advisory support provided by TACC. When initial financing did not cover the full cost of fulfilling the U.S. order, TACC provided additional non-repayable funding and remained engaged throughout the financing period. This support reduced the firm's immediate liquidity risk, stabilized cash flow during production, and allowed the company to complete the export transaction. Participation in Indigenous entrepreneurship programs and Métis and other Indigenous support networks also strengthened planning capacity and reduced uncertainty for lenders and partners.

In this case, export participation depended on prior domestic retail performance, the firm's ability to manage short-term operational strain, and institutional financial support that reduced execution risk.

Readiness did not result from a long-term export strategy. Instead, it emerged when domestic performance and Indigenous financial and advisory networks aligned quickly enough to respond to unexpected international demand.

85 Nuez Acres, "Nuez Acres."

86 Interview, Anthony Wingham, Co-founder and Chief Operating Officer, Nuez Acres, 2026. See Case Illustration 1 in Appendix C.

87 Crick and Crick, "Coopetition and COVID-19: Collaborative Business-to-Business Marketing Strategies in a Pandemic Crisis"; and Hollensen, *Marketing Management: A Relationship Approach*.

McGraw Seafood Inc. (2008): A community-owned, export-driven enterprise

The McGraw Seafood Inc. (2008)[88] case illustrates sustained export participation within a mature, export-oriented enterprise operating at scale. Among the three dimensions, *Durability* is the most strongly illustrated in this case.

McGraw Seafood Inc.: Indigenous ownership driving global growth

McGraw Seafood Inc. (2008) is 100 per cent owned by Elsipogtog First Nation in Tracadie, New Brunswick. The company has operated for more than 50 years and became fully First Nations owned in 2008 as part of a community economic development strategy. Community fishers harvest under commercial and communal licences held by the First Nation. McGraw Seafood purchases, processes, and markets the product, linking local harvesting to international buyers. It processes snow crab, lobster, redfish, and steelhead trout, employing about 15 to 20 workers off-season and up to 250 during peak months. About 90 to 95 per cent of production is exported, mainly to the United States, with additional sales to Japan, China, South Korea, and limited European markets. Following the ownership transition, the company strengthened its branding and market positioning to reflect community control and long-term stability.[89]

Demonstration

The company has processed and exported seafood for decades under federal regulations. It fills large seasonal orders and maintains long-term relationships with brokers in the United States and Asia. It supplies casinos, cruise lines, and restaurants that require consistent quality and volume. Management participates in trade missions and works with Food & Beverage Atlantic, including development of the Indigenous brand Tekpa. Operating in New Brunswick, management works in both English and French, which supports communication with buyers, regulators, and industry partners. These activities provide direct evidence that production, compliance, and distribution systems function reliably in export markets.

Durability

Seafood processing is seasonal and requires careful coordination. Employment increases from about 15 to 20 workers in the off-season to as many as 250 during peak months. Community ownership of fishing licences helps secure supply. The company sells to multiple countries and works with established brokers, reducing reliance on a single market. Financing from Indigenous lenders, commercial banks, and ACOA supports equipment, infrastructure, and working capital.

De-risking

McGraw Seafood reduces risk for buyers and lenders through its federally regulated processing plant and long experience exporting seafood. Buyers know the company can meet food safety standards and deliver large seasonal orders. Long-standing relationships with seafood brokers in the United States and Asia also make transactions more predictable. Because the company has operated in export markets for decades, many of the same systems that show reliability—such as consistent product quality and established buyer relationships—also reduce uncertainty for partners.

In this case, the focus is on export participation rather than export readiness because McGraw Seafood has been exporting for decades. The company processes seafood under federal regulations and regularly supplies large seasonal orders to international buyers. Long-standing relationships with seafood brokers and access to community-held harvesting licences help the company maintain export operations at scale.

88 McGraw Seafood Inc. (2008), “About McGraw Seafood.”

89 Interview, Robbie Graham, Marketing Manager, McGraw Seafood Inc. (2008), 2026. See Case Illustration 2 in Appendix C.

Bastien Industries: Aligning heritage and commercial demand

The Bastien Industries[90] case illustrates how *Demonstration*, *Durability*, and *De-risking* operate within a heritage-based cultural enterprise. Among the three dimensions, *Demonstration* is the most strongly illustrated in this case.

Bastien Industries: Crafting global reach

Bastien Industries is a 100 per cent Huron-Wendat–owned company based in Wendake, Quebec. With more than 150 years of history, the firm produces handcrafted moccasins and leather goods using techniques passed down across generations. The company operates at the intersection of manufacturing and cultural tourism. Its retail presence in Wendake, a tourism destination, drives brand visibility, sales, and export connections. Production combines in-house manufacturing with a network of home-based artisans who contribute beadwork and specialized craftsmanship. The company sells through more than 180 retail partners, online channels, and tourism-facing stores. Approximately 30 per cent of revenue comes from exports, primarily to the United States, with smaller volumes in Japan and France. The Japanese market developed following unsolicited buyer interest rather than through targeted expansion. Export growth more broadly has progressed gradually through trade shows, distributor partnerships, and tourism-related initiatives supported by the Indigenous Tourism Association of Canada (ITAC). The business operates within on-reserve governance structures while maintaining commercial distribution relationships in domestic and international markets.[91]

Demonstration

Bastien demonstrates export capability through repeat wholesale orders in the United States and continued placement with international distributors.

Entry into Japan followed unsolicited buyer interest rather than a targeted expansion strategy, indicating that external demand emerged from existing brand visibility and trade show exposure. Buyers commit to handcrafted products that require longer production timelines, signalling confidence in consistent quality and delivery. Structured marketing, tourism-aligned positioning, and clear communication of product origin support sustained export relationships.

Durability

Production depends on coordination between in-house manufacturing and a network of home-based artisans who complete beadwork and specialized finishing. This distributed production model allows the company to maintain traditional craftsmanship while responding to wholesale demand. Management aligns order volume with available craft labour and margin expectations. Export growth occurs gradually and reflects available capacity rather than rapid expansion. Bastien's measured approach to entering new markets reflects the company's focus on growing exports carefully and taking on new opportunities only when production and finances can support them.

De-risking

Bastien Industries reduces uncertainty by working through established distributors who manage wholesale relationships and market access. These intermediaries provide predictable sales channels and help coordinate orders in international markets. Bastien also expands gradually and aligns order volume with available artisan capacity. This approach limits the risk of overextending production while reflecting the financing constraints that many Indigenous exporters face when entering new markets.

Export readiness in this case rests primarily on *Demonstration*, as repeat wholesale demand confirms that branding and product quality meet export market expectations. *Durability* and *De-risking* support this position by ensuring that production capacity matches order volumes and by relying on established distributor channels to manage international sales.

90 Bastien Indigenous Craftsmanship, "Story."

91 Interview, Jason Picard-Binet, CEO, Bastien Industries, 2026. See Case Illustration 3 in Appendix C.

NorSask Forest Products: Community-owned production in global lumber markets

The NorSask Forest Products Limited Partnership[92] case illustrates *Demonstration*, *Durability*, and *De-risking* in a trade-exposed lumber market, with *Durability* most clearly shaping how the company sustains export participation.

NorSask: Indigenous ownership in global lumber markets

NorSask Forest Products LP is a 100 per cent First Nations–owned sawmill operated by the Meadow Lake Tribal Council (MLTC), representing nine First Nations in northern Saskatchewan. The mill was built in 1971, purchased by the Government of Saskatchewan in 1981, and became fully MLTC-owned in 1998. NorSask produces softwood lumber and employs approximately 120 to 140 workers, about 70 to 75 per cent of whom are Indigenous. Historically, exports have accounted for roughly 40 to 50 per cent of revenue, with the United States as the primary international market. Its location in northern Saskatchewan places the mill within trucking distance of U.S. construction markets. That proximity provides logistical access to cross-border demand but also exposes the company directly to U.S. softwood lumber duties, countervailing measures, and trade policy shifts. Export participation therefore operates within ongoing commodity price volatility and cross-border regulatory risk.[93]

Demonstration

NorSask demonstrates export capability through standardized grading, consistent production volumes, and reliable fulfillment of contractual specifications. In lumber markets, buyers assess dimensional accuracy, moisture content, shipment timing, and compliance documentation. Long-standing cross-border participation has built internal expertise in pricing under duty regimes and executing contracts within regulated markets.

Durability

Durability is the most prominent dimension in this case because the company operates in a market shaped by trade duties, price swings, and transportation costs. A large share of revenue has historically come from U.S. sales, which exposes the company to countervailing and anti-dumping duties and exchange rate shifts. When duties increased, management shifted more sales to Canadian commercial markets such as Alberta, Saskatchewan, and Manitoba. This flexibility allows exports to remain part of the sales mix without determining the company's overall stability. Leadership coordinates forestry supply, production, and sales to adjust volume as conditions change while protecting margins, cash flow, and stable employment across nine owner First Nations.

De-risking

The company reduces uncertainty for buyers through clear contracts and reliable delivery systems. In lumber markets, buyers depend on predictable shipment timing, accurate grading, and proper documentation. NorSask's experience managing contracts and coordinating cross-border shipments helps ensure that orders are delivered as agreed, even when market conditions change.

In the NorSask case, the focus is on export participation rather than export readiness because they have exported lumber to the United States for many years. The company's ability to adjust sales between U.S. and Canadian markets allows it to continue exporting even when trade duties or market conditions change. By carefully managing production, pricing, and logistics, NorSask maintains stable operations while participating in cross-border lumber markets.

92 NorSask Forest Products Inc., "NorSask Forest Products."

93 Interview, Senior Representative 1 and Senior Representative 2, NorSask Products LP, 2026. See Case Illustration 4 in Appendix C.

Canadian Arctic Producers: Coordinated marketing of Inuit art

The Canadian Arctic Producers (CAP)[94] case illustrates *Demonstration*, *Durability*, and *De-risking* within a cooperative intermediary model, with *De-risking* most clearly defining export readiness.

Canadian Arctic Producers: From Arctic communities to global buyers

Canadian Arctic Producers (CAP) is the marketing and sales arm of Arctic Cooperatives Limited, an Inuit-owned cooperative system that represents 33 community cooperatives across Nunavut, the Northwest Territories, and Yukon.

Artists sell their artwork to their local cooperative, which is governed by an Indigenous board. CAP handles pricing, paperwork, shipping, customs forms, and relationships with buyers from its office in Mississauga, Ontario. In the past, exports made up about 40 per cent of sales. Today, exports account for about 5 per cent, mainly because of stricter regulations and changing market conditions, not because international demand has disappeared. CAP continues to sell to buyers in the United States and Europe and works with clients in more than 25 countries. The system connects artists in remote northern communities with centralized marketing and export support in southern Canada.[95]

Demonstration

CAP's export credibility does not rest on individual artists proving capacity but on institutional reputation built over decades of international gallery relationships. Buyers transact with a centralized entity rather than dispersed producers. *Demonstration* therefore operates at the system level: Consistent pricing, standardized documentation, and predictable delivery across communities signal that the network functions as a coordinated commercial platform.

Durability

Durability emerges from aggregation. By pooling artwork from multiple communities, CAP stabilizes supply and maintains market presence even when production levels vary locally. Centralized commercial coordination reduces the burden on individual artists and shields them from direct exposure to exchange rates, permitting requirements, and buyer negotiations. The cooperative structure distributes market risk across the network rather than concentrating it at the producer level.

De-risking

De-risking is the dominant dimension because Inuit art exports face wildlife regulations, cultural property documentation requirements, and customs scrutiny. CAP absorbs this regulatory complexity. International buyers engage one accountable intermediary instead of navigating multiple remote producers and permitting systems. This centralized compliance function reduces transaction uncertainty and makes export participation feasible despite geographic distance and regulatory barriers.

In this case, export readiness comes from the cooperative system rather than from individual artists. CAP manages compliance, documentation, and shipping on behalf of artists, allowing buyers to work with one accountable organization instead of many remote producers.

94 Canadian Arctic Producers (CAP), "About Canadian Arctic Producers."

95 Interview, RJ Ramrattan, General Manager, Canadian Arctic Producers representative, 2026. See Case Illustration 5 in Appendix C.

Patrick Hunter Inc.: Network-driven and digital exporting

The Patrick Hunter Inc.[96] case illustrates *Demonstration*, *Durability*, and *De-risking* in a network-driven and digital business model, with *Demonstration* most clearly defining export readiness.

Patrick Hunter Inc.: Indigenous art, digital reach

Patrick Hunter Inc., operating as Patrick Hunter Art and Design, is owned and run by Patrick Hunter, an Ojibwe artist from Keeseekoowenin First Nation, in Treaty 2, Manitoba. The business was founded in 2014 and incorporated in 2023. Hunter works between Batchawana Bay in Northern Ontario and Toronto in Southern Ontario, maintaining community connections while accessing urban markets and creative networks. The company provides art, branding, and licensing services along with online sales of prints and merchandise. Exports account for about 15 per cent of annual revenue, approximately $10,000, with most sales to the United States and occasional orders to New Zealand and Europe. International projects, including digital design work for U.S. sports organizations, developed through referrals and social media rather than through a formal export strategy. The case examines export readiness within a sole-owned, digitally enabled creative business.[97]

Demonstration

Export capability shows up through completed projects and repeat clients rather than through a formal export plan. U.S. sports commissions, including work for the Chicago Blackhawks and the Premier Lacrosse League, developed through Instagram and referrals. These projects demonstrate that international clients trust the artist's work and delivery. Online sales through Shopify also generate cross-border orders without using a distributor. In this case, public visibility, past client work, and an active online presence function as proof that the business can serve international customers.

Durability

As a sole-owned incorporated business, operations still depend largely on the owner's time and capacity. The owner handles design, communication, invoicing, and shipping. Licensing agreements help generate income without requiring new physical production each time. This allows the business to earn revenue even when workload is high. The business also adjusts export activity to match available time and administrative capacity. This approach allows the company to sustain small-scale export activity while maintaining its core design work.

De-risking

Risk reduction relies on digital tools and professional networks. Shopify automates customs forms and shipping codes, which lowers paperwork errors. Written licensing agreements clearly set payment terms and usage rights. Membership in CCIB and the Canadian Gay and Lesbian Chamber of Commerce provides introductions, mentorship, and access to trusted buyers, reducing uncertainty when working with new international clients.

In this case, export readiness depends primarily on *Demonstration*. Visible creative work, repeat clients, and an active online presence provide evidence that the business can serve international customers. Digital tools and licensing agreements support small cross-border transactions reliably.

96 Patrick Hunter Inc., "Home."

97 Interview, Patrick Hunter, Artist, Patrick Hunter Inc., 2026. See Case Illustration 6 in Appendix C.

How governance and geography shape readiness in the case studies

Across the six case studies, readiness is not defined by intention or training completion but by how performance, stability, and risk management are assessed in practice. While businesses develop skills build capability over time, readiness is recognized when external partners judge that operations are credible, capacity is sustained, and risk is manageable. The cases show that these elements appear differently depending on governance structure, business model, and geography.

Governance and business model contrasts

Across cases, governance determines where authority and accountability sit, while business model determines how export functions are organized.

In individually owned SMEs such as Patrick Hunter Inc., readiness is judged at the level of the owner, particularly when the business is operated as a sole proprietorship. Completed projects and repeat clients demonstrate performance. Stability depends on the owner's capacity to manage workload and maintain steady income. Risk is managed through contracts, digital platforms, and trusted relationships.

In privately owned firms such as Nuez Acres and Bastien Industries, readiness is assessed at the company level. Proof of performance includes retail placement, distributor relationships, and successful order fulfillment. Stability depends on coordinating production and managing cash flow. Risk may be reduced through financing support, distributor partnerships, or gradual expansion into new markets.

Governance changes can also shift how readiness is judged. For example, when a business previously operated as a sole proprietorship, readiness was assessed primarily on the owner's personal capacity and financial position. As the business incorporated and expanded, readiness began to be judged at the firm level, based on documented revenues, staffing, production systems, and formal financing arrangements. This shift changes where accountability sits and how risk is evaluated.

In community-owned industrial enterprises such as McGraw Seafood and NorSask Forest Products, readiness is built into management and operating systems. Proof of performance comes from sustained production and ability to meet regulatory standards. Stability depends on secure supply, diversified markets, and coordinated management. Risk is reduced through scale, established buyer relationships, and access to financing.

In cooperative systems such as Canadian Arctic Producers, readiness operates at the institutional level. Buyers assess the cooperative rather than individual producers. Proof of performance is based on centralized administration and coordinated shipments. Stability depends on shared systems and combined supply. Risk is managed through centralized documentation, compliance processes, and coordinated buyer relationships.

Across these models, the basic expectations for readiness remain similar. What differs is where readiness is judged, where risk is managed, and how export operations are organized.

Geographic and infrastructure contrasts

Location affects the types of challenges businesses face when exporting.

In remote northern regions, as illustrated by Canadian Arctic Producers, distance and limited transportation options make shipping slower and more expensive. Strict customs rules and documentation requirements also add complexity. The cooperative manages shipping, paperwork, and compliance on behalf of individual artists, taking on risks that individual producers could not handle alone.

In northern industrial settings such as NorSask Forest Products, being close to the U.S. border makes exporting easier, but it also exposes the company to changes in tariffs, exchange rates, and lumber prices. Stability depends on being able to shift sales between Canadian and U.S. markets and adjust production when prices change.

In urban reserve contexts such as Bastien Industries, transportation access is less of a barrier. However, land tenure arrangements and regulatory frameworks can affect access to bank financing and eligibility for certain programs. In this setting, clear documentation, compliance with standards, and stable financial records become especially important for maintaining buyer and lender confidence.

In digitally enabled models such as Patrick Hunter Inc., physical distance matters less. Instead, readiness depends on managing workload, maintaining reliable online systems, handling digital payments, and sustaining client relationships across borders.

Geography does not determine whether exporting can happen, but it shapes the specific logistical, financial, and regulatory challenges that businesses must manage to be considered ready.

Although the businesses differ in structure and location, buyers and lenders tend to look for the same basic signs: reliable delivery, stable operations, and clear risk management. What changes is how these conditions are achieved in different business models and regions. As a result, export supports need to reflect these differences rather than assume one standard pathway.

Export pathways and implications for support

Indigenous SMEs enter export markets in different ways. Some follow reactive pathways, responding to unexpected buyer demand (e.g., Nuez Acres, Bastien Industries, Patrick Hunter Inc.). Others are structured to export from the outset, with international markets built into their operations (e.g., McGraw Seafood, NorSask Forest Products). In cooperative systems, exporting is organized at the institutional level rather than by individual producers (e.g., Canadian Arctic Producers). These differences shape when readiness is tested and what kind of support is required.

In reactive cases (e.g., Nuez Acres, Bastien Industries), opportunity comes first and systems are tested immediately. Firms may need rapid access to working capital, short-term financing, regulatory guidance, and logistical coordination to fulfill orders before payment is received. The challenge is stabilizing operations quickly enough to meet demand.

In embedded industrial models (e.g., McGraw Seafood, NorSask Forest Products), exporting is ongoing. The focus is on maintaining supply, managing trade volatility, and sustaining compliance in regulated sectors. In cooperative systems (e.g., Canadian Arctic Producers), readiness depends on strong institutional coordination—centralized documentation, shared compliance systems, and governance structures that reduce risk for members while providing a single accountable entity for buyers.

While the entry pathway differs, the core requirements for export participation do not. Buyers and lenders look for reliable delivery, stable capacity, and clear risk management. What changes is the timing and structure of support. Reactive firms may require fast, transaction-based assistance. Embedded firms may require long-term financing and trade risk management tools. Cooperative systems may require institutional strengthening rather than firm-level training. Support mechanisms need to reflect how export readiness develops in practice.

Strengthening export readiness through the 3Ds

Export readiness refers to the point at which external partners—including lenders, Indigenous financial institutions, trade promotion agencies, and buyers—judge that a business has sufficient evidence, stability, and risk management capacity to enter or expand in international markets. Readiness is not something a business declares on its own, and it is not based on basic skills training alone. Instead, readiness is recognized when a business shows reliable performance, stable operations over time, and the ability to manage risk.

The following six actions show how the 3Ds framework can improve how export-support organizations assess readiness and coordinate their support. These actions are not changes businesses must make on their own. Instead, they suggest ways that governments, trade agencies, Indigenous business organizations, and lenders can adjust how they design export programs and services. Each action reflects patterns observed across the case studies and interviews. The actions are organized around *Demonstration*, *Durability*, and *De-risking*. Together, they help clarify how export readiness is recognized and how organizations can work together to support Indigenous exporters.

I. Strengthening *Demonstration*

(Making export capability visible)

Demonstration improves when businesses can show observable proof of performance.

Action 1: Differentiate skills training, application, and readiness assessment

Export readiness assessments can better distinguish between training completion and demonstrated delivery capability.

Why this matters (3Ds lens)
Across cases, training alone did not produce readiness. Readiness emerged when skills were applied in real transactions and externally validated. Case study businesses developed credibility by fulfilling orders, managing inventory, and coordinating logistics under real market conditions.

System adjustments

- Separate foundational skills training from export readiness assessment.
- Assess readiness using delivery evidence (fulfilled contracts, inventory management, logistics execution), not on course completion alone.

Primary actors

- Training providers (FITT, colleges) ⟶ deliver foundational knowledge.
- Advisors and IFIs ⟶ support application in real transactions.
- Trade support agencies (TCS, RDAs) ⟶ assess readiness based on demonstrated delivery.
- Indigenous business organizations ⟶ interpret readiness within governance contexts.

3Ds Outcome
Clearer sequencing strengthens *Demonstration* signals and reduces premature readiness labelling.

Action 2: Expand structured pilot transactions

Export support programs should enable businesses to test export markets through small, real transactions before scaling up.

Why this matters (3Ds lens)
Many Indigenous SMEs build capability by learning through exporting. Small transactions allow businesses to test production, pricing, logistics, and compliance in real conditions. In the case study businesses, completed orders create observable evidence that strengthens *Demonstration* and builds external confidence.

System adjustments

- Support small-scale, time-bound export transactions before businesses attempt large-scale expansion.
- Provide bridge financing for initial production, inventory, or shipment costs tied to test orders.
- Require post-transaction reviews to document lessons and delivery performance.

Primary actors

- Trade promotion agencies ⟶ facilitate buyer connections tied to pilot sales.
- Governments and RDAs ⟶ provide cost sharing and pilot funding.
- IFIs ⟶ offer short-term bridge financing for test orders.
- Indigenous organizations and EDOs ⟶ support preparation and post-sale review.

3Ds outcome

Generates tangible delivery evidence that strengthens *Demonstration* and supports future readiness assessments.

II. Strengthening *Durability*

(Sustaining export participation over time)

Durability improves when businesses can maintain export activity across time and volatility.

Action 3: Adopt differentiated readiness assessments

Export readiness frameworks should use sector- and governance-specific criteria instead of applying the same assessment standards to all businesses.

Why this matters (3Ds lens)

The cases showed that *Durability* may appear differently across sectors and ownership structures. Commodity exports, cooperative systems, cultural enterprises, and digital creative SMEs each maintain stability in distinct ways. Uniform readiness criteria risk misjudging export sustainability by assuming all businesses operate the same way.

System adjustments

- Develop sector-sensitive readiness criteria that reflect how export sustainability appears across industries.
- Align financing assessments with governance structure, including community-owned enterprises, sole-owned businesses, and cooperative systems.
- Use cooperative-specific evaluation frameworks that assess institutional capacity rather than individual businesses.

Primary actors

- Trade support agencies ⟶ revise readiness assessment frameworks.
- IFIs and mainstream lenders ⟶ adapt financing assessments to governance structures and sector realities.
- Indigenous business organizations ⟶ contextualize governance structures.
- Policy departments ⟶ formalize differentiated readiness pathways.

3Ds outcome

Expectations are aligned with actual operating conditions, strengthening *Durability* by reflecting how stability functions across different business models.

Action 4: Invest in relationship-based infrastructure

Export support systems should prioritize long-term relationships and continuity, not just short-term project funding.

Why this matters (3Ds lens)

Durability depends on continuity. Across case study businesses, sustained relationships with advisors, intermediaries, and sector partners helped them maintain export participation over time. Stable institutional relationships reinforce long-term capability more effectively than isolated programs.

System adjustments

- Shift export-related funding toward multi-year operational support for Indigenous-led intermediaries rather than short-term project grants.
- Allocate dedicated export coordination time within EDO roles to reduce turnover and portfolio overload.
- Sequence advisory support across export stages (preparation, pilot transactions, scaling).

Primary actors

- Governments ⟶ establish multi-year funding frameworks that support continuity.
- Indigenous organizations (CCIB, Cando, regional entities) ⟶ provide convening and mentorship support.
- IFIs ⟶ integrate long-term advisory roles alongside financing.
- Industry associations ⟶ maintain sector-specific engagement over time.

3Ds outcome

Export participation is stabilized across time and volatility, reinforcing *Durability*.

III. Strengthening *De-risking*

(Reducing uncertainty for partners)

De-risking improves when transactions become more predictable and coordination across the export system becomes clearer.

Action 5: Strengthen coordination and referral mechanisms

Export support systems should provide clear entry points and coordinated pathways across training, financing, and trade programs.

Why this matters (3Ds lens)

Across cases, export progress often depended on someone coordinating systems behind the scenes. When roles and pathways are clear, businesses can move more easily between training, financing, and market entry programs. When programs are fragmented, businesses must navigate complexity alone, increasing uncertainty for lenders and buyers.

System adjustments

- Establish clear entry points into export support systems.
- Create shared intake or referral pathways across training, financing, and trade programs.
- Coordinate program sequencing so training, financing, and trade promotion follow a logical progression rather than being delivered as disconnected programs.

Primary actors

- RDAs ⟶ align regional programming.
- Trade Commissioner Service ⟶ integrate with Indigenous intermediaries.
- Indigenous intermediaries and advisors ⟶ guide businesses across export support systems.
- Federal and provincial/territorial departments ⟶ harmonize criteria and communication.

3Ds outcome

Uncertainty for buyers, lenders, and program partners is reduced by making roles and support pathways clearer and more predictable. This increased certainty strengthens *De-risking* across the ecosystem.

Action 6: Reform trade mission design to clarify risk before scaling

Trade missions should focus on clarifying risks and market conditions before firms attempt rapid expansion.

Why this matters (3Ds lens)

The case study businesses illustrate that some uncertainty can only be resolved through participation. However, avoidable risks—such as unclear buyer expectations, compliance requirements, or financial exposure—can be clarified before SMEs scale into new markets.

System adjustments

- Include structured pre-mission discussions that identify compliance, pricing, and capacity risks.
- Define mission objectives around understanding market conditions rather than securing immediate sales.
- Provide post-mission follow-up that supports staged market entry rather than being focused on rapid expansion.

Primary actors

- Trade promotion agencies → design missions around risk clarification and staged engagement.
- Governments → support equitable access and structured follow-up.
- Indigenous organizations → help interpret requirements within governance realities.
- IFIs → assess financial exposure before SMEs commit to larger transactions.

3Ds outcome

Avoidable uncertainty is reduced and more deliberate scaling is supported, strengthening *De-risking* across the export ecosystem while recognizing that some risk is inherent to exporting.

Given the number and diversity of actors involved in export ecosystems, it can be difficult to see how their roles relate to one another. The matrix below in Table 1 organizes key actors according to how they contribute to the three core functions: *Demonstration*, *Durability*, and *De-risking*. This structure helps clarify what each actor does and how their roles fit together within the broader system.

Table 1
How actors can contribute to the 3D framework

Actor	Strengthens ***Demonstration***	Strengthens ***Durability***	Strengthens ***De-risking***
Training providers	Deliver foundational export skills (pricing, logistics, compliance) that prepare SMEs to apply knowledge in real transactions	Build baseline managerial and operational capability that supports long-term participation	Clarify documentation, standards, and compliance requirements that reduce administrative uncertainty
Trade promotion agencies (e.g., TCS)	Facilitate pilot transactions and buyer introductions that generate evidence of delivery capability	Adapt readiness assessments to reflect sector conditions and governance structures	Design trade missions that clarify buyer expectations, regulatory requirements, and market risks
Indigenous financial institutions (IFIs)	Provide bridge financing and advisory support that enables SMEs to fulfill pilot export transactions	Offer flexible financing aligned with Indigenous governance models and business realities	Reduce financial uncertainty through relationship-based lending, staged financing, and advisory support
Mainstream financial institutions (banks)	Evaluate delivery history, revenues, and operational performance when considering export financing	Provide working capital, export credit, and scaling finance tied to stable business operations	Offer trade finance tools (e.g., credit facilities, guarantees, letters of credit) that reduce payment and transaction risk
Indigenous organizations and intermediaries (e.g., CCIB, Cando, regional entities)	Interpret readiness within Indigenous governance contexts and support learning from completed transactions	Provide relationship continuity, mentorship, and advisory support across export stages	Help businesses navigate export programs, clarify requirements, and connect to trusted partners
Economic development officers (EDOs)	Support preparation for pilot transactions and readiness assessments within communities	Maintain ongoing export coordination and advisory support for local businesses	Reduce administrative uncertainty by connecting SMEs to appropriate programs, financing, and trade supports
Regional development agencies (RDAs)	Provide funding for pilot transactions, export preparation, and market testing	Support multi-year ecosystem funding for intermediaries and regional export coordination	Align regional programs and referral mechanisms to improve system coordination
Governments (federal, provincial/territorial)	Fund export preparation programs and pilot transaction initiatives	Establish multi-year funding frameworks that support institutional continuity	Harmonize program criteria, communication, and policy frameworks across departments

Source: Signal49 Research.

Appendix A

Methodology

About the research

This study examines how Indigenous small and medium-sized enterprises (SMEs) in Canada develop the skills and capabilities required to participate in export markets as well as how existing training, advisory, and institutional supports influence export readiness and performance. The research focuses on identifying skills gaps, barriers to accessing export-related training and support, and promising practices that have enabled some Indigenous businesses to successfully enter and grow in international markets.

The project is guided by the Truth and Reconciliation Commission of Canada's Call to Action 92(ii), which calls on the corporate sector to ensure equitable access for Indigenous peoples to jobs, training, and business opportunities and to support sustainable Indigenous economic development. In this context, the study situates export participation as one pathway through which Indigenous businesses can scale, diversify markets, and strengthen long-term economic capacity.

The research is structured around the following core questions:

1. What does the current distribution of Indigenous SMEs across Canada look like by industry and region, and how do export-oriented sectors compare in terms of growth, scale, and business demographics?
2. What skills do Indigenous businesses need to grow in export markets, what challenges do they face in gaining those skills, and what can be learned from Indigenous exporters who have succeeded in overcoming those challenges?

The study uses a mixed-methods approach, combining a review of existing literature and policy documents, qualitative interviews, case profiles, and secondary data analysis. This approach supports a comprehensive understanding of both systemic patterns and lived experiences while grounding findings in real-world export contexts.

Oversight for the project was provided by a research advisory board comprising leaders with expertise in Indigenous business development, exporting, finance, export education/training, and public policy. Advisory board members provided guidance on research design, recruitment strategies, interpretation of findings, and knowledge mobilization, helping ensure that the research reflects Indigenous business realities and priorities.

Research design and methods

Literature and policy review

The research began with a review of academic literature, policy documents, program evaluations, and grey literature related to Indigenous entrepreneurship, export development, skills training, and trade participation. The review aimed to identify the following:

- Documented barriers and facilitators affecting Indigenous SMEs' participation in export markets.
- Existing export training, mentorship, and support models relevant to Indigenous businesses.
- Gaps in current policy and program approaches.

Sources were identified through targeted database searches and an environmental scan of federal, provincial, Indigenous-led, and international organizations involved in trade, economic development, and skills training. Sixty-three sources were reviewed. Priority was given to sources published between 2015 and 2026, with particular attention to Indigenous-led research and Canadian policy contexts. Findings from the review informed the development of interview guides and the selection of case study businesses.

Quantitative analysis

To situate qualitative findings within a broader economic context, the project draws on secondary data from Statistics Canada's census data from 2001 and 2021 to examine the distribution of Indigenous SMEs by industry, region, and export intensity. This analysis focuses on identifying patterns in Indigenous business participation in export-oriented sectors and differences across regions and identity groups.

Qualitative methods

The qualitative component of this study consisted of two complementary elements: (1) semi-structured interviews with participants involved in Indigenous exporting ecosystems, and (2) in depth case study profiles of Indigenous-owned and led SMEs that have successfully entered export markets. Together, these methods were used to capture both system-level perspectives on export skills and supports as well as business-level experiences of building export capability in practice. Interviews were conducted from December 9, 2025, to February 3, 2026. All interviews were conducted virtually using Microsoft Teams.

Semi-structured interviews

To capture first-hand perspectives on export skills, challenges, and support needs, the research team conducted semi-structured interviews with participants involved in Indigenous exporting ecosystems. Interviews focused on practical experiences with exporting, skills development pathways, interactions with training and support organizations, and perceptions of export readiness.

Participants represented a range of roles across the export ecosystem, including the following:

- One Indigenous business owner who exports goods internationally
- Three educators and export trainers
- Three trade and business support organizations
- Three financial support organizations/institutions, including Indigenous financial institutions
- Five government and policy stakeholders involved in export support
- In total, 15 participants were interviewed. All participants were 18 years of age or older and based in Canada.

Recruitment and data collection

Participants were recruited through multiple channels, including direct outreach by email and phone, outreach through partner organizations, and a public project landing page hosted by Signal49 Research. Interviews were conducted virtually using Microsoft Teams and audio recorded with participant consent.

Each interview lasted approximately 60 minutes and followed a semi-structured interview guide tailored to the participant's role (e.g., business owner, educator, export support organization). Following each interview, the research team prepared a detailed interview summary capturing key points, quotes, and illustrative examples relevant to the research questions. These summaries formed the primary qualitative data used for analysis.

Participants were provided with their interview summaries for review and verification. This member-checking process allowed participants to confirm accuracy, clarify statements, and request edits prior to analysis. All participants provided informed consent prior to participation and were offered honoraria in line with established best practices for Indigenous research engagement.

Interview analysis

The interview summaries generated from semi-structured interviews were coded and analyzed using NVivo qualitative data analysis software. Coding themes were first developed based on the research questions and past Signal49 research projects, followed by an exploratory examination within interviews. To improve coding consistency, two members of the research team independently coded a sample of the interview summaries in NVivo and compared their results. Any differences were discussed and resolved, and the coding framework was refined before it was applied to the full dataset.

Themes were examined based on how frequently they were noted as well as the intensity of the observation. A theme was considered present when it was mentioned by three or more participants. Themes were then compared across subpopulations to identify patterns that appeared within specific groups or across multiple groups. Due to the small sample size, we cannot generalize beyond the individual interviewees.

Case study interviews

The study includes six in-depth case study profiles of Indigenous-owned and led SMEs that have successfully entered export markets. (See Table A1.) The case study component draws on eight semi-structured interviews conducted with business owners and ecosystem actors. Case study businesses were identified through the literature and policy review, recommendations from the research advisory board, and referrals from interview participants and partner organizations. Selection was purposive rather than representative, with businesses chosen to reflect variation in geography, governance and ownership models, sectoral focus, and scale of operations.

The businesses include privately owned small businesses, community-owned enterprises, and cooperative systems operating across urban, rural, and remote contexts. Together, they illustrate the range of business models through which Indigenous exporters participate in domestic and international markets as well as the differing skills, governance, and ecosystem supports required in each context.

Case study information was drawn from interviews with business leaders and staff as well as interviews with representatives from organizations that supported the businesses' export activities (e.g., financial institutions, training providers, and trade organizations) whenever possible. Supplementary materials—including company websites, media coverage, and publicly available documents—were reviewed to provide additional context.

Organizations featured in case studies were given the opportunity to review their interview summaries that were later used in analysis.

While organizations are named, individual participants remain anonymized unless explicit consent for attribution was provided. Participants reviewed and approved any information in the report that was directly attributed to them.

Table 1
Demographic breakdown of the case study sample

Business name	Nuez Acres	McGraw Seafood Inc. (2008)	Bastien Industries	NorSask Forest Products Limited Partnership	Canadian Arctic Producers (CAP)	Patrick Hunter Inc.
Location	Langley, British Columbia	Tracadie, New Brunswick	Wendake, Quebec	Meadow Lake, Saskatchewan	Mississauga, Ontario (logistics); Arctic communities (production)	Ontario – lives and works in Toronto and Batchawana Bay (Northern Ontario)
Geography	Peri-urban (near urban centre)	Rural/small town	Urban (on-reserve)	Rural	Remote production; urban coordination	Urban and Rural
Ownership	Majority Métis-owned; female-led	100% First Nations owned (Elsipogtog First Nation)	100% First Nations owned (Huron-Wendat)	100% First Nations owned (Meadow Lake Tribal Council; nine First Nations)	Inuit-owned cooperative system (33 communities)	100% First Nations owned
Business model	Privately owned SME	Community-owned enterprise	Privately owned SME	Community-owned industrial enterprise	Cooperative intermediary	Single-operator incorporated business
Sector	Beauty and personal care	Fisheries	Cultural products	Forestry and lumber manufacturing	Arts and culture	Arts, design, and cultural education
Number of employees	2 full time; 1 part time; 2–3 seasonal; freelancers	~15–20 off-season; up to ~250 seasonal	16 full-time employees; 8 part-time artisans	~120–140 total (70–75% Indigenous)	Arctic Cooperatives Ltd. employs 140+; CAP art operations vary	1
Export revenue	~10%	~90–95%	~30%	~30–40% (historically 60–70%)	~5% (historically ~40%)	~15% (~$10,000 annually)

Source: Signal49 Research.

Case study interview analysis

Qualitative analysis was conducted using the verified interview summaries and case study materials. The research team imported finalized de-identified summaries into NVivo and applied a thematic coding approach aligned with the study's research questions and conceptual framework. Initial codes reflected key areas of interest, including skills development, export readiness, support navigation, and ecosystem interactions, with additional themes identified inductively during analysis. To improve coding consistency, two members of the research team coded a sample of the interview summaries in NVivo and compared their results. Differences in coding were discussed and resolved, and the coding framework was adjusted before it was applied to the full dataset.

The research team engaged in regular analytic discussions to compare interpretations, refine themes, and ensure reporting consistency across participant groups. Draft findings and emerging themes were shared with members of the research advisory board for feedback and validation, supporting interpretive rigour and ensuring that findings accurately reflected Indigenous business realities and export contexts.

Ethics and confidentiality

This project received research ethics approval from Veritas Independent Research Ethics Board. All participants provided informed consent and were informed of their right to withdraw at any time prior to publication. Interview data was de-identified and stored securely on Canadian servers, accessible only to the research team.

Appendix B

Glossary of key terms

Indigenous businesses: Indigenous businesses play a distinct role in Canada's economic landscape, often explicitly combining commercial goals with community, cultural, and environmental responsibilities.[1] According to Statistics Canada, an *Indigenous-owned business* is one in which at least 51 per cent of the enterprise is owned by individuals who self-identify as First Nations, Métis, or Inuit.[2] These businesses range from sole proprietorships and partnerships to incorporated entities and community-owned corporations, reflecting diverse governance and ownership models.[3] In this context, *small and medium-sized enterprises (SMEs)* are defined as businesses with fewer than 500 employees and less than $50 million in annual gross revenues.[4]

Indigenous exporters include individually owned businesses, community-owned corporations, cooperatives, and joint ventures.[5] Distinctions-based approaches highlight different starting points and export pathways among First Nations, Inuit, and Métis businesses.[6]

Export ecosystem: The set of interconnected factors that shape how a business exports in practice. This includes governance structures, business models, geography, relationships, infrastructure, and the organizations that provide training, financing, and market access. Export ecosystems influence which export pathways are feasible, how risk is managed, and how easily businesses can access support.

Business model: The way a business is organized to create value and earn revenue. This includes what it sells (goods or services), how it delivers them (digitally, physically, or through intermediaries), who makes decisions, and how profits are distributed. Indigenous business models range from sole proprietorships and family-owned firms to community-owned enterprises, co-operatives, and joint ventures.

Governance structure: The decision-making arrangements that guide how a business operates. For Indigenous enterprises, this may involve owners, boards, community leadership, or member-owned cooperative systems, shaping timelines, accountability, and risk tolerance.

Export pathway: The route a business takes into export markets, which may involve direct sales, intermediaries, cooperatives, digital delivery, or gradual market testing rather than a single linear process.

1 Crown–Indigenous Relations and Northern Affairs, "Business and reconciliation."
2 Statistics Canada, *Indigenous-owned Businesses in Canada, 2005 to 2021*.
3 Innovation, Science and Economic Development Canada, "Understanding co operatives: How they work, types and contributions."
4 Innovation, Science and Economic Development Canada, "Key Small Business Statistics – 2021."
5 Innovation, Science and Economic Development Canada, "Understanding co operatives: How they work, types and contributions."
6 Stopp, "The Inuit Co-Operative Movement in Northern Canada, 1959–1968."

Appendix C

Case Illustrations

1. Nuez Acres

Interviewee: Anthony Wingham, Co-founder and Chief Operating Officer
Company: Nuez Acres
Ownership: Majority Métis owned; Indigenous female led
Location: Langley, British Columbia
Employees: Two full-time; one part-time; seasonal staff
Sector: Beauty and personal care
Export Revenue: ~10 per cent (order based)
Export Markets: United States, Australia, Europe, Asia

Founded in 2019 by Anthony Wingham and Nancy Wingham (Co-founder and CEO), Nuez Acres produces waterless, pecan-based skin serums using pecans sourced from Mexico. The business emerged from the founders' experience during a trade dispute that sharply reduced pecan prices in Chihuahua, Mexico, where the family has roots. Initially approximately 70 per cent Indigenous owned, the company later became majority Indigenous female led.

When COVID-19 disrupted farmers' markets, the founders pivoted to e-commerce and wholesale distribution. Participation in Pow Wow Pitch and the Trade Accelerator Program (TAP) strengthened export planning and increased confidence to pursue markets beyond British Columbia.

The company developed a compliant, market-ready product line, secured Health Canada approval, obtained UPC codes, and gained traction through online sales and placement in 241 Walmart Canada stores. Domestic retail presence provided operational validation and production experience before expanding into export markets.

Operating with a lean team and limited capital, the firm manages growth incrementally. Preparing for retail and export orders increased costs related to inventory, marketing, labelling, and regulatory compliance. Competing in a beauty sector dominated by multinational brands required disciplined cash flow management and careful scaling.

Tale'awtxw Aboriginal Capital Corporation, an Indigenous financial institution serving southwestern British Columbia, played a central role in supporting expansion. TACC provides loans, non-repayable funding, and ongoing advisory support throughout the life of a loan.

In 2024, a major U.S. retailer placed the company's first large-scale export order. Entering the U.S. market introduced new regulatory, logistical, and cash flow pressures. When initial financing proved insufficient, TACC provided additional non-repayable funding, enabling the company to fulfill the order and enter export markets.

The experience of Nuez Acres illustrates how export participation develops through domestic validation, incremental growth, and relationship-based financial support.

2. McGraw Seafood Inc. (2008)

Interviewee: Robbie Graham, Marketing Manager
Company: McGraw Seafood Inc.
Ownership: 100 per cent First Nations owned (Elsipogtog First Nation)
Location: Tracadie, New Brunswick
Employees: ~15–20 off-season; up to ~250 during peak season
Sector: Seafood processing
Business Model: Community-owned enterprise
Products: Snow crab, lobster, redfish, steelhead trout
Export Revenue: ~90 to 95 per cent
Export Markets: United States (primary), Japan, China, South Korea, limited Europe

McGraw Seafood Inc. (2008) has operated for more than 50 years and became fully First Nations owned in 2008, when Elsipogtog First Nation purchased the company as part of a broader economic development strategy. The enterprise harvests, processes, and exports Atlantic seafood while reinvesting profits into employment, infrastructure, and community well-being. Community ownership of fishing licences strengthens supply stability and supports long-term planning.

The company operates primarily as an export-driven business, with 90 to 95 per cent of production sold internationally through business-to-business channels. It supplies brokers, casinos, cruise lines, and restaurants, relying on established intermediary relationships. The United States remains its dominant market alongside Japan, China, South Korea, and limited European destinations. Market focus has shifted over time in response to tariffs, quotas, and changing global demand.

McGraw Seafood's export performance is supported by decades of federally regulated processing, consistent fulfillment of high-volume seasonal orders, and established international buyer relationships. Engagement with Food & Beverage Atlantic has supported trade missions and the development of the Indigenous brand Tekpa, which highlights First Nations harvesting from Canada's cold waters.

Seafood processing is seasonal and capital intensive. Employment rises substantially during peak fishing months, requiring careful coordination of labour, working capital, and supply. Community-held licences reduce input risk, while diversified markets limit dependence on a single destination. Financing from Indigenous lenders, commercial banks, and support from the Atlantic Canada Opportunities Agency has supported equipment upgrades and working capital needs. At the same time, exchange rate fluctuations, trade policy shifts, and global price volatility continue to shape operational planning.

McGraw Seafood illustrates how community ownership, supply control, established buyer networks, and access to financing can sustain long-term export participation in global commodity markets.

3. Bastien Industries

Interviewee: Jason Picard-Binet, President and Chief Executive Officer
Company: Bastien Indigenous Craftsmanship (Bastien Industries)
Ownership: 100 per cent First Nations owned (Huron-Wendat)
Location: Wendake, Quebec (urban, on-reserve)
Employees: 16 full-time employees; eight part-time home-based artisans
Sector: Handcrafted goods and cultural products
Business Model: Privately owned
Products: Moccasins, leather goods, handcrafted cultural items
Export Revenue: ~30 per cent
Export Markets: United States (primary), Japan, France (limited)

Bastien Indigenous Craftsmanship is a Huron-Wendat enterprise with more than 150 years of history. Fully Indigenous owned and operating on the Huron-Wendat reserve in Wendake, Quebec, the company combines commercial production with community-based artisanal work. While historically led by the Bastien family, the company is now directed by a Huron-Wendat CEO, maintaining leadership continuity within the First Nation.

The company produces handcrafted moccasins and leather goods using techniques passed down across generations. Its mandate emphasizes cultural preservation alongside commercial growth. Production blends in-house manufacturing with a network of home-based artisans who contribute beadwork and specialized craftsmanship.

Approximately 30 per cent of revenue comes from exports, primarily through U.S. retailers and distributors, with smaller volumes in Japan and France. Bastien operates a mixed business-to-business and direct-to-consumer model, selling online, through tourism-facing retail locations, and via more than 180 retail partners. Export growth has developed gradually through trade shows, distributor partnerships, and tourism-driven initiatives supported by the Indigenous Tourism Association of Canada alongside strong brand positioning rooted in Indigenous cultural industries.

Because products are handcrafted, production capacity is tied to skilled labour and cannot expand rapidly without affecting quality. Export decisions therefore reflect available artisan capacity, expected returns, and market conditions. On reserve governance structures and funding requirements also shape how the company accesses export supports.

Bastien's long-standing retail relationships, consistent quality control, and professional marketing practices support sustained participation in international markets. Gradual expansion into the United States, Japan, and France reflects measured growth aligned with cultural integrity and production capacity.

The case illustrates how a heritage-based enterprise can use export markets to sustain artisanal knowledge while strengthening economic resilience within the Huron-Wendat community.

4. NorSask Forest Products Limited Partnership

Interviewees: Senior Representative 1, Senior Representative 2
Company: NorSask Forest Products Limited Partnership
Ownership: 100 per cent First Nations owned (Meadow Lake Tribal Council; nine First Nations)
Location: Meadow Lake, Saskatchewan
Employees: ~120 to 140 (70 to 75 per cent Indigenous)
Sector: Forestry and lumber manufacturing
Business Model: Community-owned industrial enterprise
Products: Softwood lumber
Export Revenue: ~30 to 40 per cent (historically 60 to 70 per cent)
Export Markets: United States (reduced); primarily domestic Canada

NorSask Forest Products Limited Partnership is a long-established, 100 per cent First Nations–owned sawmill operated by the Meadow Lake Tribal Council (MLTC), representing nine First Nations in northern Saskatchewan. The mill produces softwood lumber while generating stable employment and long-term economic returns for its member nations. Approximately 70 to 75 per cent of employees are Indigenous, reflecting its community-based mandate.

Since the early 1990s, NorSask has exported lumber, historically sending most production to the United States. U.S. duties, tariffs, and rising logistics costs have shifted a greater share of sales toward Canadian markets. Export participation reflects strategic responses to commodity pricing, transportation capacity, exchange rates, and duty structures rather than changes in demand alone.

In lumber markets, credibility depends on meeting standardized grading specifications and delivering contracted volumes reliably. NorSask manages logistics directly and frequently sells on a delivered basis, maintaining control over transportation and inventory. Decades of cross-border activity have built internal expertise in trade compliance, pricing under duty regimes, and contract execution. Long-standing buyer relationships reinforce confidence in product quality and supply reliability.

Forestry operates within cyclical commodity markets shaped by housing demand, exchange rates, and trade disputes. NorSask maintains stability through coordinated planning across forestry, production, finance, and sales alongside disciplined cost management. Workforce training in safety, grading standards, and equipment operation supports consistent output. Rather than pursuing rapid export expansion, leadership prioritizes steady production, cost control, and stable employment across its nine First Nations owners.

NorSask's approach illustrates how operational consistency, governance coordination, and accumulated trade expertise sustain export participation in capital-intensive commodity markets.

5. Canadian Arctic Producers (CAP)

Interviewee: RJ Ramrattan, General Manager
Company: Canadian Arctic Producers (division of Arctic Cooperatives Limited)
Ownership: Inuit-owned cooperative system (33 communities)
Location: Mississauga, Ontario (operations); Arctic communities (production)
Sector: Arts and culture
Business Model: Cooperative intermediary
Products: Inuit sculpture, prints, textiles, jewelry
Export Revenue: ~5 per cent (historically ~40 per cent)
Export Markets: United States; Europe (Germany, France, Italy, Switzerland); ~25 to 30 countries

Canadian Arctic Producers is the marketing and distribution division of Arctic Cooperatives Limited, an Inuit-owned and Inuit-governed cooperative system representing 33 community cooperatives across Nunavut, the Northwest Territories, and Yukon. Artists sell their work locally through community cooperatives, while CAP manages pricing, compliance, logistics, and buyer relationships from its southern office in Mississauga. Each cooperative is governed by its own Indigenous board, and CAP remains accountable to these locally controlled entities.

Historically, approximately 40 per cent of sales were export related, primarily to the United States and Europe. Export revenue has declined to roughly 5 per cent, reflecting market shifts and regulatory complexity rather than reduced international demand.

CAP coordinates artwork from multiple remote communities, maintains consistent quality standards, and sustains long-term relationships with galleries and collectors in more than 25 countries. By centralizing pricing, documentation, customs coordination, and shipping, CAP reduces administrative burden for artists and ensures reliable international delivery. Approximately 80 per cent of exported works are soapstone sculptures, which face fewer regulatory barriers than materials such as ivory or whalebone. Decades of experience navigating wildlife permitting and customs requirements have built credibility with international buyers.

The cooperative model distributes risk and stabilizes income flows. Rather than requiring individual artists to develop export expertise, CAP centralizes trade knowledge, allowing artists to focus on production while institutional capacity manages compliance and market access. This structure addresses challenges linked to remoteness, transportation constraints, and limited local infrastructure.

CAP illustrates how centralized coordination within a cooperative system can sustain international market participation while aligning export activity with Inuit governance and community-based artistic production.

6. Patrick Hunter Inc.

Interviewee: Patrick Hunter, Artist, Founder and Chief Executive Officer
Company: Patrick Hunter Inc. (operates publicly as Patrick Hunter Art and Design)
Ownership: 100 per cent First Nations owned (Ojibwe; Keeseekoowenin First Nation)
Location: Ontario (Batchawana Bay and Toronto); roots in Manitoba
Sector: Art, design, and cultural education
Business Model: Sole-owned incorporated business
Products and Services: Digital design and branding services, physical art merchandise (prints, mugs, art cards, gift items), and licensed artwork for merchandise distributed more broadly
Export Revenue: ~15 per cent (~$10,000 annually)
Export Markets: United States (primary), occasional Europe, New Zealand, Australia

Patrick Hunter Inc. operates at the intersection of Indigenous art, design, and cultural education. Founded in 2014 and incorporated in 2023, the business produces original artwork, custom design projects, licensed merchandise, and educational paint workshops delivered to schools, corporations, and government organizations.

Hunter is originally from Keeseekoowenin First Nation, in Treaty 2, Manitoba. He later relocated to Ontario, building his practice while moving between Toronto and Batchawana Bay in Northern Ontario. This geographic mobility reflects both opportunity and constraint: Toronto offers access to corporate clients and networking spaces, while Batchawana Bay provides proximity to community and creative grounding. Operating between urban and rural contexts has shaped how the business develops markets and relationships. International work emerged organically rather than through a formal export strategy. U.S. based collaborations included design projects for the Chicago Blackhawks and the Premier Lacrosse League, involving indigenized branding, jersey design, and arena land acknowledgment visuals delivered digitally.

Physical exports occur primarily through an online Shopify storefront offering prints, mugs, and art cards, with approximately 15 per cent of sales shipped to the United States and occasional orders reaching markets such as New Zealand and Europe. Export participation developed incrementally. Early shipments were handled manually through post offices, often without full knowledge of customs codes or compliance requirements. Over time, Shopify's integrated shipping tools streamlined documentation and classification processes. Capacity remains the primary constraint. As a sole operator managing creative production, workshops, licensing, and administration, time and mental bandwidth limit deliberate international expansion.

Networking has been both essential and challenging. Without early access to family members or mentors who were business owners, Hunter described learning entrepreneurship independently. Membership in the Canadian Council for Indigenous Business and the Canadian Gay and Lesbian Chamber of Commerce later provided access to corporate networks and larger contracts. These relationships proved more influential than formal export programs, which he noted are often oriented toward resource industries rather than arts and culture businesses.

For Hunter, international success is measured not only in revenue but in recognition and impact. Orders arriving from distant markets reinforce both business viability and the global reach of Indigenous artistic expression. The case highlights how creative-sector exporters often scale through digital platforms, licensing, and network-based opportunities rather than structured export pathways.

Appendix D

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