

Extensive Canadian manufacturing capability supplies the needs of Do-It-Yourselfers. At the same time, many Canadian manufacturers export DIY products. The United States is Canada's primary export market. Precise DIY production statistics in Canada are difficult to obtain. Most manufacturers produce a range of products that may also be supplied to the non-DIY trade (construction & home builders). As such, the breakdown of these sales figures is seldom released.

#### The Canadian Export Strategy Implemented

The first Canadian DIY mission to Japan was conducted 20-29 September 1985 (see Appendix A for membership). It was the first joint industry/government project aimed at assessing the export potential for Canadian DIY products and services in the Japanese market. The mission agenda also presented members with an opportunity to acquire an overview of the Japanese perspective on DIY and to identify possible market niches.

Coincident to, but quite separate from this first mission, the Japanese Government announced market liberalization measures in August 1985 aimed at increasing Japanese imports of foreign manufactured goods. As part of these measures, Japan's Ministry of International Trade and Industry (MITI) implemented a Specific Products Trade Expansion Programme (STEP) to promote the import of manufactured goods.

STEP provided a vehicle through which opportunities for Canadian DIY products could be further explored and more clearly defined. Following discussions with the Canadian and Japanese players, DEA, DRIE, the Canadian Embassy in Tokyo, and the MITI STEP Committee agreed to form the STEP Canadian DIY Products Committee (see Appendix B for membership). This committee undertook to apply the STEP mandate to the Canadian Government's initial thrust to assist Canadian manufacturers in defining and assessing the Japanese DIY market.

The data collected in the first mission and its later analysis was combined and applied to exploratory discussions and "second stage" negotiations defining the STEP Canadian DIY Products Committee mandate. This led to the Committee's decision to have the Research Institute for Distribution Policy in Tokyo conduct a Survey of the DIY Market in Japan.