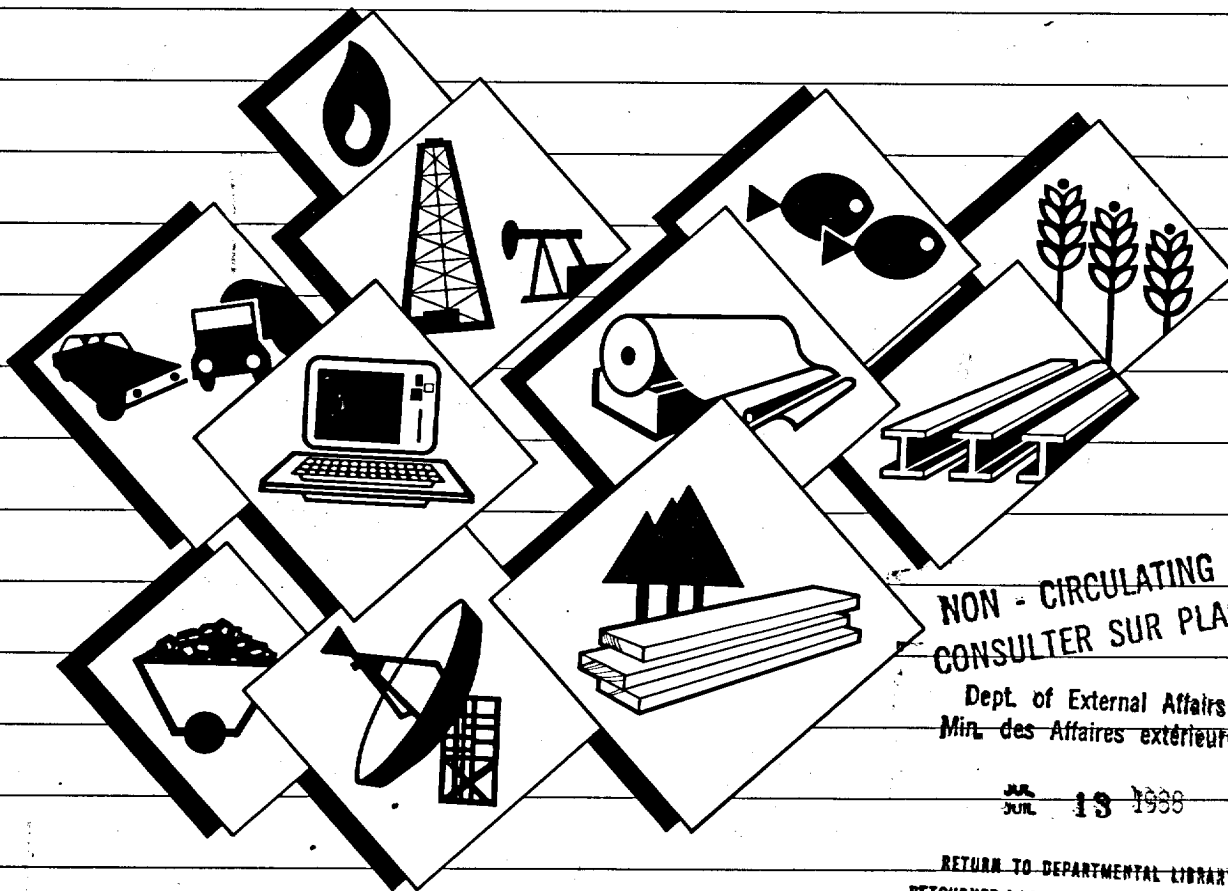




**DRAFT**  
**GEOGRAPHICAL SYNOPSIS**  
**FOR CONSULTATION PURPOSES ONLY**

**UNITED STATES**

**1988-89 EXPORT AND INVESTMENT PROMOTION  
OPERATIONAL PLAN**



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**CONSULTER SUR PLACE**

Dept. of External Affairs  
Min. des Affaires extérieures

JUL 13 1988

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**FEBRUARY 1988**

DEPARTMENT OF EXTERNAL AFFAIRS  
Export and Investment Promotion Planning System  
1988/89 Geographic Synopsis

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## Export and Investment Promotion Planning System

88/89 Trade and Economic Overview

Mission: 601 BOSTON

Country: 577 UNITED STATES OF AMERICA

CDA'S TRADE WITH NEW ENGLAND (NE) CONTINUES TO GROW RAPIDLY WITH TWO-WAY TRADE REACHING \$8.2 BIL. & EXPORTS \$6.3 BIL IN 86. OUR MAIN EXPORTS WERE FORESTRY, SEAFOOD & TRANSPORTATION PRODUCTS. MAIN IMPORTS WERE COMPUTERS, TELECOMMUNICATIONS & OTHER HI-TECH EQUIPMENT. DESPITE THE MARKET CRASH, NE'S ECONOMIC GROWTH IS FORECAST TO EXCEED THE NATIONAL GROWTH RATE ESTIMATED AT 3.5% TO 3.7% IN 87. UNEMPLOYMENT RATE OF 3.5% REMAINS EXTREMELY LOW, HALF THE NATIONAL RATE. EMPLOYMENT IN THE SERVICE SECTOR CONTINUES TO GROW AT A RECORD PACE BUT NOT IN THE MANUFACTURING SECTOR. MASSACHUSETTS CREATED 70,000 JOBS IN THE SERVICE SECTOR IN THE LAST 12 MOS. BUT LOST 12,000 JOBS IN MANUFACTURING. THE 86 PER-CAPITA INCOME (\$17,166) IN NE CONTINUES TO OUTPACE THE NATIONAL LEVEL (\$14,641) & THIS TREND OF HIGHER INCOME SHOULD CONTINUE. NE'S HIGH TECHNOLOGY INDUSTRIES REMAIN THE ENGINE OF ECONOMIC GROWTH WITH THE COMMUNICATIONS, INFORMATICS & DEFENCE SECTORS LEADING THE EXPANSION. MAJOR RESEARCH PROGRAMS AT MIT & HARVARD HAVE RESULTED IN MANY SMALL COMPANIES BEING ESTABLISHED BY RESEARCHERS/VENTURE CAPITALISTS TO COMMERCIALIZE PRODUCTS DEVELOPED IN LABORATORIES, ESPECIALLY BIO-TECHNOLOGY. THE CONCENTRATION OF MINI-COMPUTER MANUFACTURERS HAS ALSO RESULTED IN THE ESTABLISHMENT OF NUMEROUS SOFTWARE COMPANIES. THE LARGE MEDICAL FACILITIES REPRESENT A MAJOR MARKET FOR STATE-OF-THE ART MEDICAL DEVICES. COMMERCIAL & INDUSTRIAL CONSTRUCTION REMAINS AT NEAR RECORD LEVEL. DESPITE IMPORTANT BARRIERS ON CDN LUMBER & CEMENT THE POTENTIAL FOR CDN EXPORTS REMAINS GOODS, TAKING ADVANTAGE OF NUMEROUS RESIDENTIAL CONSTRUCTION PROJECTS IN SMALLER URBAN CENTERS ACROSS NE. THE COMMERCIAL CONSTRUCTION MARKET OFFERS SIGNIFICANT EXPORT OPPORTUNITIES FOR CONTRACT FURNITURE. CONSUMPTION OF SEAFOOD, AT ABOUT 15 LBS PER CAPITA, IS NOT EXPANDING AS FAST AS PROJECTED. SUPPLIES HAVE BEEN VERY TIGHT & PRICES REACHED RECORD LEVELS EARLIER THIS YEAR BEFORE DROPPING OFF. CDA'S MARKET SHARE IS EXPECTED TO EXPAND GIVEN THAT SCANDINAVIAN SUPPLIERS ARE MARKETING MORE OF THEIR CATCH IN EUROPE. CDA'S PERFORMANCE WILL DEPEND ON CONTINUED QUALITY IMPROVEMENT & FURTHER DEVELOPMENT IN NEW HIGH VALUE-ADDED PRODUCTS.

CANADIAN SUPPLIES ARE IMPORTANT TO MEET RAPIDLY EXPANDING ENERGY DEMANDS, PARTICULARLY ELECTRICITY. SHORTFALLS IN THE ORDER OF 300 TO 1600 MW ARE ANTICIPATED BY THE MIDDLE OF THE NEXT DECADE. QUEBEC, NEW BRUNSWICK & NOVA SCOTIA COULD BECOME EVEN LARGER SUPPLIERS.

## Export and Investment Promotion Planning System

REPT: SYN-GEO 88/89 A. Post export program priorities

Region: UNITED STATES

Mission: 601 BOSTON

Market: 577 UNITED STATES OF AMERICA

The Mission selected the following sectors as priority areas for export promotion activities for the coming fiscal year:

1. 005 COMM. & INFORM. EQP. & SERV  
REASONS: FASTEST GROWING INDUSTRY, IN PARTICULAR MINI-COMPUTER SOFTWARE & ELECTRONIC COMPONENTS. COMPANIES LIKE DIGITAL EQUIPMENT (VAX) & LOTUS (1-2-3) DEVELOPING PRODUCTS WHICH ARE STANDARDS FOR INDUSTRY.
2. 004 DEFENCE PROGRAMS, PRODUCTS, SERV  
REASONS: DEFENCE SPENDING AMOUNTED TO 15.3 BIL IN 86. SEVERAL MAJOR US PRIME CONTRACTORS LOCATED IN NE. ELECTRONICS SYSTEMS DIV. AT HANSCOM AFB OFFERS MAJOR R&D OPPORTUNITIES.
3. 014 EDUCATION, MEDICAL, HEALTH PROD  
REASONS: EXPENDITURES FOR MEDICAL DEVICES/EQUIPMENT EXCEEDED \$900M IN 86. ONE OF THE MOST IMPORTANT REGIONS FOR DEVELOPMENT OF BIOTECHNOLOGY PRODUCTS, RESULTING FROM RESEARCH PROGRAMS CONDUCTED BY MAJOR UNIVERSITIES.
4. 013 CONSUMER PRODUCTS  
REASONS: ONE OF THE HIGHEST PER CAPITA INCOMES IN THE U.S. DISPOSABLE INCOME IS GROWING FASTER THAN NATIONAL AVERAGE. OPPORTUNITIES FOR FURNITURE, APPAREL, GIFTWARE & LEISURE PRODUCTS.
5. 015 CONSTRUCTION INDUSTRY  
REASONS: CDN CONSTRUCTION PRODUCTS REMAIN COMPETITIVE DUE TO FAVOURABLE EXCHANGE RATE. VERY HIGH WAGES IN NE PROVIDE OPPORTUNITIES FOR CDN EXPORTERS OF PREFABRICATED COMPONENTS.
6. 002 FISHERIES, SEA PRODUCTS & SERV.  
REASONS: PER CAPITA CONSUMPTION OF SEAFOOD CONTINUES TO EXPAND. BOSTON REMAINS MAJOR MKT AS WELL AS DISTRIBUTION CENTER FOR SEAFOOD. IMPROVED QUALITY OF CDN PRODUCTS IS REDUCING PREMIUM PAID FOR SCANDINAVIAN PRODUCTS.

The most important current Canadian export sectors to this market are (based on actual export sales):

1. 009 FOREST PRODUCTS, EQUIP, SERVICES
2. 002 FISHERIES, SEA PRODUCTS & SERV.
3. 008 TRANSPORT SYS, EQUIP, COMP, SERV.
4. 005 COMM. & INFORM. EQP. & SERV
5. 007 POWER & ENERGY EQUIP. & SERV.
6. 013 CONSUMER PRODUCTS



## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 601 BOSTON

Market: 577 UNITED STATES OF AMERICA

Sector: 002 FISHERIES, SEA PRODUCTS &amp; SERV.

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	3700.00M	\$ 3600.00M	\$ 3200.00M	\$ 2700.00M
Canadian Exports \$	1300.00M	\$ 1250.00M	\$ 1050.00M	\$ 841.00M
Canadian Share of Import Market	35.00%	35.00%	33.00%	31.00%

## Major Competing Countries

## Market Share

i) 405 ICELAND	020 %
ii) 093 DENMARK	010 %
iii) 410 NORWAY	008 %
iv) 268 KOREA	004 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are  
good market prospects

## Current Total Imports

	In Canadian \$
i) FARMED SALMON	\$ 80.00 M
ii) REDFISH	\$ 70.00 M
iii) TURBOT	\$ 30.00 M
iv) MUSSELS	\$ 0.00 M
v) MACKEREL	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian  
export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector  
(sub-sector) in this market is lower than optimum mainly because of:

- No factors reported by mission

## Export and Investment Promotion Planning System

MISSION: 601 BOSTON

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: FOLLOW-UP ON FIVE SEMINARS ORGANIZED FOR QUEBEC FISHERIES COMPANIES IN NORTHERN QUEBEC AND MAGDELIN ISLANDS.

Results Expected: 3 COMPANIES TO ENTER N. E. MARKET.

Activity: HIRE NEW COMMERCIAL OFFICER.

Results Expected: CONTINUE TO OFFER EXCELLENT SUPPORT TO INDUSTRY/GOV'S DESPITE LOSS OF COMMERCIAL OFF. WHO HAD WORKED FOR 22 YRS. IN FISHERIES SECTOR.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: START PRODUCING MONTHLY MARKET REPORT ON SEAFOOD, INCLUDING PRICE TRENDS.

Results Expected: DISSEMINATE INFORMATION ON MORE TIMELY BASIS TO INDUSTRY AND GOVERNMENT DEPARTMENTS (FED/PROV).

Activity: ORGANIZE SEMINAR/RECEPTION FOR AQUACULTURE PRODUCERS FROM CANADA (N. E. BUYERS, PROCESSORS, USERS TO ATTEND).

Results Expected: COMPETITIVE MARKET PENETRATION FOR CANADIAN FARMED PRODUCTS - SALMON, MUSSELS, ETC.

Activity: ORGANIZE MAJOR PROGRAM OF VISITS FOR NEW OFFICER RESPONSABLE FOR FISHERIES MARKETING.

Results Expected: INCREASE KNOWLEDGE OF CDN FISHERIES CAPABILITIES/ENVIRONMENT.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 601 BOSTON

Market: 577 UNITED STATES OF AMERICA

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import)	\$ 16480.00M	\$16160.00M	\$15310.00M	\$14490.00M
Canadian Exports	\$ 85.00M	\$ 90.00M	\$ 92.60M	\$ 50.60M
Canadian Share of Import Market	0.51%	0.55%	0.60%	0.30%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	098 %
ii) 051 UNITED KINGDOM	001 %
iii) 128 GERMANY WEST	001 %
iv) 237 ITALY	001 %
v) 112 FRANCE	001 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

## Products/services for which there are good market prospects

## Current Total Imports

	In Canadian \$
i) MIL RADIOS	\$ 50.00 M
ii) SPACE BASED RADAR	\$ 0.00 M
iii) MIL APPLICATION	\$ 0.00 M
iv) MICROWAVE LANDING SYSTEMS	\$ 0.00 M
v) RAST	\$ 0.00 M

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

i) Project Name: AIR DEFENCE INITIATIVE  
Approximate Value: \$ 2000 M  
Financing Source:  
For further info. please contact:  
W.J. SANFORD

ii) Project Name: SPACE DEFENCE INITIATIVE  
Approximate Value: \$ 1000 M  
Financing Source:  
For further info. please contact:  
W.J. SANFORD

## Export and Investment Promotion Planning System

MISSION: 601 BOSTON

COUNTRY: 577 UNITED STATES OF AMERICA

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- there are import restrictions which can present significant problems
- the degree of import duty protection of local industry tends to be moderate
- approval of technical standards can present problems in the case of some imported products

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- the apparent limited sectoral capability in Canada compared to other competing export countries
- non-tariff protectionist measures which are difficult to overcome

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- use of Canadian Government export promotion activities
- the existence of a bilateral economic/trade arrangement between Canada and this country

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: DEFENCE/HI TECH ANNUAL BULLETIN

Results Expected: BRING 20 NEW COMPANIES INTO MARKET. EXPAND SALES FOR CURRENT PARTICIPANTS BY \$10 M.

Activity: PARTICIPATE IN HI TECH

Results Expected: FIND 10 NEW COMPANIES FOR NEW ENGLAND MARKET

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: DETERMINE VALUE OF PROVINCIAL DEFENCE MISSIONS.

Results Expected: DIVERSIFY CANADIAN DEFENCE EXPORT SALES INTO REGIONS ADJACENT TO NEW ENGLAND.

Activity: DISTRIBUTE BOSS SYSTEM TO 5 PRIME CONTRACTORS

Results Expected: -LESSEN INQUIRIES THROUGH POST  
-INCREASE CANADIAN SALES BY \$10M

22/01/88

DEPARTMENT OF EXTERNAL AFFAIRS

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Export and Investment Promotion Planning System

MISSION: 601 BOSTON

COUNTRY: 577 UNITED STATES OF AMERICA

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: PROMOTE CANADIAN ROLE IN AIR DEFENCE INITIATIVE

Results Expected: GAIN GREATER ACCESS TO USAF MARKET FOR RAND D ACTIVITIES.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 601 BOSTON

Market: 577 UNITED STATES OF AMERICA

Sector: 005 COMM. &amp; INFORM. EQP. &amp; SERV

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	42000.00M	\$35900.00M	\$33800.00M	\$35200.00M
Canadian Exports \$	530.00M	\$ 497.00M	\$ 532.00M	\$ 447.00M
Canadian Share of Import Market	1.30%	1.40%	1.60%	1.30%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	080 %
ii) 265 JAPAN	008 %
iii) 128 GERMANY WEST	003 %
iv) 051 UNITED KINGDOM	001 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) COMPUTERS	\$ 0.00 M
ii) COMMUNICATION EQUIP.	\$ 0.00 M
iii) ELECTRONIC COMPONENTS	\$ 0.00 M
iv) SOFTWARE	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- No factors reported by mission

## Export and Investment Promotion Planning System

MISSION: 601 BOSTON

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- use of Canadian Government export promotion activities

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: ESTABLISH WORKING RELATIONS WITH MASSACHUSETTS HI-TECH COUNCIL.

Results Expected: INCREASE KNOWLEDGE OF CDN CAPABILITIES.

Activity: HIRE NEW COMMERCIAL OFFICER

Results Expected: BRING MORE DYNAMISM TO EXPORT PROMOTION IN THIS SECTOR.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: IDENTIFY KEY PUBLISHERS FOR CANADIAN SOFTWARE COMPANIES.

Results Expected: GET 4 CDN COMPANIES LISTED

Activity: IDENTIFY JOINT-VENTURE OPPORTUNITIES FOR SOFTWARE COMPANIES.

Results Expected: CONCLUDE 2 JOINT-VENTURES.

Activity: PROMOTE MORE ACTIVELY CDN EXPORTS OF COMPUTER/PERIPHERAL EQUIP., INCLUDING INCREASED ATTENDANCE BY CDN CO'S TO MAJOR SHOWS IN N. E.

Results Expected: CONCLUDE 5 REPS. AGREEMENTS FOR COMPUTER/PERIPHERAL EQUIPMENT MANUFACTURERS.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 601 BOSTON

Market: 577 UNITED STATES OF AMERICA

Sector: 008 TRANSPORT SYS, EQUIP, COMP, SERV.

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import)	\$ 13871.00M	\$10125.00M	\$ 7337.50M	\$ 5317.50M
Canadian Exports	\$ 1371.30M	\$ 994.00M	\$ 716.10M	\$ 561.40M
Canadian Share of Import Market	10.00%	10.00%	10.00%	10.00%

## Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	063 %
ii) 265 JAPAN	020 %
iii) 075 CANADA	010 %
iv) 128 GERMANY WEST	004 %
v) 268 KOREA	002 %
vi) 616 OTHER COUNTRIES	001 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects

Current Total Imports In Canadian \$

i) URBAN TRANSIT VEHICLES	\$ 0.00 M
ii) RAILWAY ROLLING STOCK	\$ 0.00 M

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

i) Project Name: PEOPLE MOVER, BOSTON URBAN TRANSIT  
Approximate Value: \$ 130 M  
Financing Source: 025 OTHER  
For further info. please contact:  
M. LANNING, COMMERCIAL OFF. BOSTON POST



## Export and Investment Promotion Planning System

MISSION: 601 BOSTON

COUNTRY: 577 UNITED STATES OF AMERICA

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- non competitive pricing

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- competitive export pricing for this market

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: POST TO CONDUCT DETAILED ANALYSIS OF URBAN TRANSIT IN BOSTON METROPOLITAN AREA.

Results Expected: STRENGTHEN CANADIAN POSITION IN MARKET BY IMPROVED REPORTING AND INFO ANALYSIS.

Activity: PROFESSIONAL STUDY OF AUTOMOTIVE AFTERMARKET.

Results Expected: FACILITATE INCREASED MARKET PENETRATION BY CANADIAN COMPANIES.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 601 BOSTON

Market: 577 UNITED STATES OF AMERICA

Sector: 013 CONSUMER PRODUCTS

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	9297.00M	\$ 6641.00M	\$ 4744.00M	\$ 3389.00M
Canadian Exports \$	150.00M	\$ 127.00M	\$ 106.40M	\$ 85.70M
Canadian Share of Import Market	1.60%	2.00%	2.20%	3.00%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	050 %
ii) 434 TAIWAN	020 %
iii) 189 HONG KONG	010 %
iv) 268 KOREA	008 %
v) 608 WEST EUROPE	008 %
vi) 616 OTHER COUNTRIES	004 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP.

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports  
In Canadian \$

i) FURNITURE	\$ 0.00 M
ii) APPAREL	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- there are import restrictions which can present significant problems
- the degree of import duty protection of local industry tends to be moderate

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- high tariffs

Export and Investment Promotion Planning System

MISSION: 601 BOSTON

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade fairs
- competitive export pricing for this market
- strong sectoral capability in Canada

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: ASSESSMENT OF PARTICIPATION BY CONSUMER PRODUCT MANUFACTURERS IN NEW EXPORTER EVENTS (NEBS)

Results Expected: INCREASED CONSUMER PRODUCT INITIATIVES IN NEW ENGLAND MARKET.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: PROFESSIONAL MARKET STUDY OF APPAREL INDUSTRY IN NEW ENGLAND.

Results Expected: PERMIT CDN COS WITH LITTLE CURRENT SUCCESS TO ENHANCE OPPORTUNITIES. 10 COMPANIES AND \$1 M.

Activity: POST TO CONDUCT STUDY OF FURNITURE MARKET IN MASSACHUSETTS.

Results Expected: FACILITATE INCREASED MARKET PENETRATION BY CANADIAN COMPANIES. EXPECT \$10M IN GROWTH.

Activity: POST TO ASSESS GIFTWARE AND CRAFTS OPPORTUNITIES IN NEW ENGLAND.

Results Expected: DEVELOP MARKETING STRATEGY INFORMATION FOR THIS SECTOR.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 601 BOSTON

Market: 577 UNITED STATES OF AMERICA

Sector: 014 EDUCATION, MEDICAL, HEALTH PROD

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1000.00M	\$ 900.00M	\$ 800.00M	\$ 750.00M
Canadian Exports \$	30.00M	\$ 29.90M	\$ 29.07M	\$ 35.17M
Canadian Share of Import Market	0.03%	0.03%	0.03%	0.04%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	092 %
ii) 128 GERMANY WEST	003 %
iii) 051 UNITED KINGDOM	002 %
iv) 507 SWEDEN	002 %
v) 112 FRANCE	001 %
vi) 093 DENMARK	001 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Market share declining

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) SURGICAL GLOVES	\$ 0.00 M
ii) ALL DISPOSABLE PRODUCTS	\$ 0.00 M
iii) ARAGNOSTIC ELECTRO MEDICAL INSTRUMENTS	\$ 0.00 M
iv) MEDICAL AND SURGICAL INSTRUMENTS	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

Export and Investment Promotion Planning System

MISSION: 601 BOSTON

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: FOLLOW-UP MARKETING ACTIVITIES RELATED TO DISTRIBUTION OF CMDD TO 250 AREA MEDICAL DEVICE PURCHASING AUTHORITIES COMPLETED IN 1987.

Results Expected: INCREASE CDN EXPORTS BY \$3 MILLION.

Activity: ASSESS EFFECTIVENESS OF BIO-TECHNOLOGY SEMINAR FOR QUEBEC COMPANIES ORGANIZED IN BOSTON IN 1987.

Results Expected: DETERMINE IF FORMAT SUITABLE FOR BIO-TECHNOLOGY COMPANIES FROM OTHER PROVINCES.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ESTABLISH REPRESENTATION FOR CDN MEDICAL DEVICES COMPANIES.

Results Expected: CONCLUDE 5 REPS AGREEMENT

Activity: CONVINCING LARGE GROUP BUYING ORGANIZATION OF MEDICAL PRODUCTS/SERVICES TO INCREASE NUMBER OF CDN COMPANIES LISTED.

Results Expected: GET 10 NEW CDN COMPANIES LISTED.

Activity: IDENTIFY BIO-TECHNOLOGY COMPANIES INTERESTED IN JOINT-VENTURES

Results Expected: CONCLUDE 2 JOINT-VENTURES.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 601 BOSTON

Market: 577 UNITED STATES OF AMERICA

Sector: 015 CONSTRUCTION INDUSTRY

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	7795.00M	\$ 7446.00M	\$ 7112.00M	\$ 6790.00M
Canadian Exports \$	130.00M	\$ 113.80M	\$ 97.40M	\$ 68.50M
Canadian Share of Import Market	1.60%	1.50%	1.30%	1.00%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	096 %
ii) 265 JAPAN	001 %
iii) 507 SWEDEN	001 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects

Current Total Imports In Canadian \$
i) PRE-BUILT HOUSING \$ 80.00 M
ii) WINDOWS AND DOORS \$ 30.00 M
iii) CABINETRY \$ 20.00 M

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

i) Project Name: THIRD HARBOUR TUNNEL  
Approximate Value: \$ 1500 M  
Financing Source:  
For further info. please contact:  
W. J. SANFORD

ii) Project Name: DEPRESS CENTRAL ARTERY PROJECT  
Approximate Value: \$ 1800 M  
Financing Source:  
For further info. please contact:  
W. J. SANFORD

## Export and Investment Promotion Planning System

MISSION: 601 BOSTON

COUNTRY: 577 UNITED STATES OF AMERICA

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- No factors reported by mission

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

- the adequacy of exporter information in Canadian Directories
- sourcing assistance from Canadian federal/provincial governments departments

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: ASSIST IN CONSTRUCTION PRODUCTS REVIEW, MAGAZINE PROMOTION OF CANADIAN PRODUCTS

Results Expected: DEVELOP ALTERNATIVE METHODS TO RAISE PROFILE OF CANADIAN COMPANIES

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: COMMISSION SURVEY OF NEW ENGLAND PRE-BUILT HOUSING MARKET

Results Expected: EXPAND SALES OF CANADIAN FIRMS BY \$10M.  
IMPROVE THOROUGHNESS OF MARKET INFO.

Export and Investment Promotion Planning System

MISSION: 601 BOSTON

COUNTRY: 577 UNITED STATES OF AMERICA

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: PROMOTE PARTICIPATION OF NEW EXPORTERS TO BORDER STATES IN NEW ENGLAND MARKET.

Results Expected: -ESTABLISH 10 NEW CDN FIRMS IN MARKET  
-ASSIST 20 OTHER FIRMS

Activity: ASSESS PARTICIPATION IN AMERICA EAST AND THE BIG SHOW

Results Expected: DETERMINE MOST EFFICIENT LONG TERM METHOD OF INTRODUCING COMPANIES TO NEW ENGLAND MARKET



Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 601 BOSTON

Country: 577 UNITED STATES OF AMERICA

## Highlights of Investment Environment

Estimated Value Of Equity Investment  
In Canada From This Post Territory:

\$ 10 000.00 M

Estimated Value Of Annual Direct Equity  
Investments To All Destinations From  
This Post Territory:

\$ 2 000.00 M

Country Destinations Of Direct  
Equity Investment From Post  
TerritoryEstm. Value  
\$ CDN% Of Annual Direct Equity  
Investment Outflows By  
Category Of Investors

1. 075 CANADA	\$ 2 000.00 M	1. Corporations : 30.00 %
2. 224 IRELAND	\$ 1 000.00 M	2. Institutional : 65.00 %
3. 434 TAIWAN	\$ 300.00 M	3. Entrepreneurs : 4.00 %
4. 189 HONG KONG	\$ 200.00 M	4. Immigrant Entr.: 1.00 %

The Mission Has Reported Factors That Tend To Change  
Outward Flows Of Investment From The Post Territory Including:

- Corporate Search For Cheaper Production And/Or Operating Costs  
Outside The Country
- Corporate Expansion To Seek New Markets
- Corporate Expansion To Serve Better Existing Markets
- Large Capital Pools Seeking Investment Outlets Abroad (e.g. Oil States)

The Mission Reports That Investors From The Post Territory Who Invest Abroad  
In Manufacturing Tend To Invest In The Following Sector(s) Subsector(s)

## -SECTOR(S)-

1. 005 COMM. & INFORM. EQP. & SERV
2. 004 DEFENCE PROGRAMS, PRODUCTS, SERV
3. 014 EDUCATION, MEDICAL, HEALTH PROD

## -SUBSECTOR(S)-

- 054 COMPUTERS, SOFTWARE & SYSTEMS
- 043 ELECTRICAL & ELECTRONIC
- 142 HOSP. & MEDICAL EQUIP, INSTRUM.

DATE: 88/01/25

DEPARTMENT OF EXTERNAL AFFAIRS

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 601 BOSTON

Country: 577 UNITED STATES OF AMERICA

**Equity Propensity Of Key Sources Of Investment From This Territory**

Corporations : 100% Ownership Of Existing Corporate Facility  
Institutional : Partial Ownership Of Existing Corporate Facilities With Direct  
Involvement In Day-to-Day Operations  
Entrepreneurs : Start-up Investment To Create New Enterprise (100% Ownership)  
Immigrant Entr.: Start-up Investment To Create New Enterprise (100% Ownership)

**Sector Preferences By Type Of Key Investors**

Corporations : Manufacturing Industries  
Institutional : Portfolio Investment  
Entrepreneurs : Manufacturing Industries  
Immigrant Entr.: Services

**Investment Promotion Priority Sectors Sub-Sectors  
Program Plans And Anticipated Results.**

Sector : 005 COMM. & INFORM. EQP. & SERV  
Subsector: 054 COMPUTERS, SOFTWARE & SYSTEMS

**Reason(s):**

LARGEST INDUSTRY IN NEW ENGLAND: VALUE OF PRODUCTION EXCEEDS \$35 BIL.  
FOLLOW-UP ON MAJOR ADVERTISING CAMPAIGN ON INVESTMENT OPPORTUNITIES  
IN ELECTRONICS SECTOR.

**Program Plans:**

ESTABLISH PERSONAL CONTACT IN EACH COMPANY THAT HAS REQUESTED INFORMATION FOLLOWING AD CAMPAIGN. SERVICE THEIR INQUIRIES THOROUGHLY.

**Anticipated Results:** TWO INVESTMENTS IN CANADA.

Sector : 014 EDUCATION, MEDICAL, HEALTH PROD  
Subsector: 142 HOSP. & MEDICAL EQUIP, INSTRUM.

**Reason(s):**

150 COMPANIES IN N. E. HAVE REQUESTED INFORMATION ON THE CDN MEDICAL  
DEVICE INDUSTRY FOLLOWING MAILING DONE BY POST DURING SUMMER/87. WILL  
FOLLOW-UP TO DETERMINE BOTH EXPORT & INVESTMENT OPPORTUNITIES.

DATE: 88/01/25

DEPARTMENT OF EXTERNAL AFFAIRS

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 601 BOSTON

Country: 577 UNITED STATES OF AMERICA

Investment Promotion Priority Sectors Sub-Sectors  
Program Plans And Actipicipated Results.

Sector : 014 EDUCATION, MEDICAL, HEALTH PROD  
Subsector: 142 HOSP. & MEDICAL EQUIP, INSTRUM.

Program Plans:

DURING FOLLOW-UP WITH 150 COMPANIES, DETERMINE THOSE COMPANIES HAVING INVESTMENT POTENTIAL.

Anticipated Results: ONE INVESTMENT IN 88/89, TWO IN 89/90.

Sector : 014 EDUCATION, MEDICAL, HEALTH PROD  
Subsector: 141 PHARMACEUTICALS, BIOTECHNOLOGY

Reason(s):

BOSTON IS NUMBER ONE CENTER FOR BIOTECHNOLOGY IN US & HAS POOL OF VENTURE CAPITAL. N.E. COMPANIES COULD BE INTERESTED IN INVESTING IN JOINT R&D OR TAKE MINORITY QUITTY POSITION IN CDN BIOTECH COMPANIES.

Program Plans:

IN CONJUNCTION WITH POST PROGRAM ON TECHNOLOGY INFLOW, PROMOTE JOINT R&D & EQUITY INVESTMENT AS MECHANISMS TO EFFECT TECHNOLOGY TRANSFER TO CANADA.

Anticipated Results: ONE INVESTMENT IN 88/89.

Other Investment Program Plans

Activity(ies):

WORKING WITH CDN INVESTMENT DEALERS, POST IDENTIFIED 25 MONEY MANAGERS WHO WERE INVITED TO SENIOR EXEC. INVEST. SEMINAR IN OCT/87. EIGHT REPS FROM BOSTON ATTENDED. DURING NEXT FY POST WILL CONCENTRATE ITS EFFORTS ON DEVELOPMENT CONTACTS WITH THESE 25 COMPANIES.

Anticipated Results: BETTER KNOWLEDGE OF CDN INVESTMENT CLIMATE  
ADDITIONAL PORTFOLIO INVESTMENT.

DATE: 88/01/25

DEPARTMENT OF EXTERNAL AFFAIRS

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 601 BOSTON

Country: 577 UNITED STATES OF AMERICA

Investment Promotion Activities Proposals

Type Of Event: 010 MINISTERIAL MISSION

Description: INFORMATICS INVESTMENT OPPOR. IN MTL (MTL STRAT.)  
Priority: 3 Date: 09/88  
Sector: 005 COMM. & INFORM. EGP. & SERV  
Sub-Sector: 999 ALL SUB-SECTORS  
Location: BOSTON

Type Of Event: 050 SEMINARS

Description: CDN SOFTWARE HOUSES CAPABILITIES: JV OPPORTUNITIES  
Priority: 2 Date: 02/89  
Sector: 005 COMM. & INFORM. EGP. & SERV  
Sub-Sector: 054 COMPUTERS, SOFTWARE & SYSTEMS  
Location: BOSTON

Description: INVESTMENT OPPORTUNITIES IN BIOTECH. SECTOR IN CDA  
Priority: 1 Date: 11/88  
Sector: 014 EDUCATION, MEDICAL, HEALTH PROD  
Sub-Sector: 141 PHARMACEUTICALS, BIOTECHNOLOGY  
Location: BOSTON

## Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 601 BOSTON		
Sector: 001 AGRI & FOOD PRODUCTS & SERVICE		
020 MISSION OUTGOING SOLO FOOD SHOW	BOSTON	0290
Sector: 002 FISHERIES, SEA PRODUCTS & SERV.		
020 MISSION OUTGOING SEMINAR ON UNDERUTILIZED SEAFOOD SPECIES	BOSTON	0989
Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV		
020 MISSION OUTGOING DEFENCE MISSION FROM WESTERN CANADA	BOSTON	0989
024 MISSION INCOMING DEFENCE SUB-CONTRACTORS MISSION		0689
Sector: 005 COMM. & INFORM. EQP. & SERV		
010 FAIRS NORTH EAST COMPUTER FAIR	BOSTON	1089
Sector: 006 ELECTRONICS EQUIP. & SERV		
020 MISSION OUTGOING OCEANOGRAPHY SEMINAR	WOODSHOLE, MASS.	1289
Sector: 013 CONSUMER PRODUCTS		
010 FAIRS CONTRACT FURNITURE SHOW	BOSTON	0989
Sector: 014 EDUCATION, MEDICAL, HEALTH PROD		
010 FAIRS NORTH EAST HOSPITAL SHOW	BOSTON	0589
Sector: 015 CONSTRUCTION INDUSTRY		
020 MISSION OUTGOING AMERICA EAST PRE-BUILT HOUSING SOLO SHOW	BOSTON BOSTON OR PORTLAND	0190 1189

## Export and Investment Promotion Planning System

## 88/89 Trade and Economic Overview

Mission: 602 CHICAGO

Country: 577 UNITED STATES OF AMERICA

RECENT ECONOMIC PERFORMANCE: SLIGHTLY BELOW NAT'L AVERAGE; RECENT TRENDS SUGGEST LONG RECESSION IN AGRICULTURE MAY HAVE ENDED; MODERATING OF EXPENSES, IMPROVEMENT IN EXPORTS, HIGH GOV'T SUPPORT PAYMENTS COULD SET STAGE FOR RECOVERY IN AGRICULTURE WHICH IS LIKELY TO BE CHARACTERIZED BY SLOW, STEADY IMPROVEMENT RATHER THAN RAPID GAINS OF 70S. CHANGING OPPORTUNITIES: LOWER INTEREST RATES, CONTINUED CONSUMER BUOYANCY; STRONG HOUSING MARKET, CONSUMER SERVICES, RETAILING & CONSTRUCTION TRADES BUOYANT. STATE GOV'TS SUCCESSFULLY PURSUED NEW INVESTMENT IN AUTOMOTIVE INDUSTRY, INCLUDING INVESTMENT FROM CDA. IMPROVED ASSET & EQUITY RATIOS OF CHICAGO'S MAJOR BANKS. ENHANCED REPUTATION OF CHICAGO AS AN INT'L FINAN. CENTRE. COMMUNICATIONS REVOLUTION & FINANCIAL INNOVATIONS ARE YIELDING A STREAM OF NEW COMPUTERIZED PRODUCTS THAT ARE RADICALLY ALTERING THE INDUSTRY. ON DOMESTIC FRONT, BOUNDARIES DEMARCATING BANKS FROM OTHER FINANCIAL INSTITUTIONS ARE BECOMING INCREASINGLY OBSCURE. IN INTERNATIONAL FIELD, FINANCIAL SERVICES SUPPLIERS & REGULATORS BARELY ABLE TO KEEP PACE WITH DEVELOPMENTS IN HIGHLY CHARGED & COMPETITIVE ENVIRONMENT OF EMERGING GLOBAL FINANCIAL SYSTEM. EXPORT PERSPECTIVE: CHICAGO POST TERRITORY REMAINS HIGHLY ATTRACTIVE MARKET. TERRITORY INCLUDES FOUR OF THE COUNTRY'S TOP 17 METRO MARKETS. ELECTRONICS, SOFTWARE, RESEARCH/DEVELOPMENT, PHARMACEUTICALS, ROBOTICS & OTHER HIGH TECH INDUSTRIES ARE EXPANDING (IN ABSOLUTE NUMBER OF JOBS GENERATED AS WELL AS RELATIVE TO OTHER US STATES). CORPORATE & PUBLIC ATTITUDES TOWARDS CDNS/CDN PRODUCTS & SERVICES REMAINS POSITIVE. THERE IS WIDE SUPPORT IN INDUSTRY & IN GOV'T FOR THE PROPOSED CDA/US FREE TRADE AGREEMENT. NO LOCAL PROTECTIONIST BACKLASH; MEDIA COVERAGE IS POSITIVE & SYMPATHETIC TO CDN VIEWS. PROCUREMENT/SPECIFYING OFFICIALS IN GOV'T AGENCIES APPEAR WELL DISPOSED TO CONSIDER SERIOUSLY CDN BIDS. MANY MIDWEST COMPANIES HAVE LIMITED TRADE/INVESTMENT LINKS ABROAD. TOGETHER WITH COMPANIES WHO MAY BE RATIONALIZING THEIR NORTH AMERICAN AND/OR GLOBAL OPERATIONS, THESE COMPANIES REPRESENT SIGNIFICANT POTENTIAL FOR NEW INVESTMENT & TECHNOLOGY INFLOWS TO CDA. RECENT MONTHS HAVE SEEN MAJOR MOVES TO ACQUIRE CDN EQUITY POSITIONS BY AMOCO (DOME PETROLIEUM), JMB REALTY (CADILLAC FAIRVIEW), & FIRST NATIONAL BANK OF CHICAGO (WOOD GUNDY). AS NORTH AMERICA'S MAJOR CORPORATE MEETING & INDUSTRIAL EXHIBITION CENTER, CHICAGO CONTINUES AS A MAJOR FOCAL POINT FOR CDN INDUSTRIAL DEVELOPMENT ACTIVITY.

## Export and Investment Promotion Planning System

REPT: SYN-GEO 88/89 A. Post export program priorities

Region: UNITED STATES

Mission: 602 CHICAGO

Market: 577 UNITED STATES OF AMERICA

The Mission selected the following sectors as priority areas for export promotion activities for the coming fiscal year:

## 1. 013 CONSUMER PRODUCTS

REASONS: WITH THE LARGEST BUYING CAPACITY NATIONALLY FOR HARDWARE PRODUCTS CENTERED IN SEARS, ACE AND TRU-VALUE, OPPORTUNITIES FOR THE EXPERIENCED EXPORTER ARE LIMITLESS. NEARLY EVERY MAJOR NATIONAL CONSUMER SHOW

## 2. 001 AGRI &amp; FOOD PRODUCTS &amp; SERVICE

REASONS: FOOD PRODUCTS & BEVERAGE ARE VIRTUALLY RECESSION-PROOF & WILL GROW SLOWLY BUT STEADILY OVER THE NEXT 10 YEARS. PRODUCTS THAT APPEAL TO THE DIET/FITNESS CONSCIOUS WILL SEE THE STRONGEST GROWTH. CHICAGO IS

## 3. 016 INDUSTRIAL MACHIN, PLANTS, SERV.

REASONS: THE COMPONENTS PARTS OF THIS SECTOR PROVIDES THE REAL GROWTH POSSIBILITIES AS COMPANIES TRY TO REDUCE COSTS. CHICAGO IS A MAJOR MANUFACTURING CENTER & THE HOME TO SEVERAL NATIONAL EXHIBITIONS CONFERENCES.

## 4. 004 DEFENCE PROGRAMS, PRODUCTS, SERV

REASONS: THE FREE TRADE AGREEMENTS & DOD COMPETITION ADVOCATE PROGRAMS ARE PROMOTING GREATER OPPORTUNITIES FOR CDN COMPANIES WITHIN THE DP/DPSA. THE POSTING OF AN OFFICER TO ST. LOUIS WILL PROVIDE AN ENHANCED

## 5. 008 TRANSPORT SYS, EQUIP, COMP, SERV.

REASONS: AUTO PARTS PROVIDE CDN COS. WITH PRIVILEGED ACCESS TO GROWING MARKET FOR OEM & AFTERMARKET PRODUCTS & COMPONENTS. EMPHASIS ON THE MAINTENANCE & DEVELOPMENT OF URBAN TRANSIT SYSTEMS CREATES ADDED OPPORTUNITIE

## 6. 005 COMM. &amp; INFORM. EQP. &amp; SERV

REASONS: OPPOR. IN OFFICE AUTOMATION ARE STRONG AS LOCAL COS TRY TO IMPROVE PRODUCTIVITY BY COMPUTERIZING. CDN PRODUCTS/SERVICES ARE REGARDED TO EQUAL TO US PRODUCTS. THERE ARE EXCELLENT SOFTWARE TRADE SHOWS WHICH

The most important current Canadian export sectors to this market are (based on actual export sales):

1. 012 PETROCHEM & CHEM PROD, EQP, SERV
2. 008 TRANSPORT SYS, EQUIP, COMP, SERV.
3. 009 FOREST PRODUCTS, EQUIP, SERVICES
4. 009 FOREST PRODUCTS, EQUIP, SERVICES
5. 012 PETROCHEM & CHEM PROD, EQP, SERV

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 602 CHICAGO

Market: 577 UNITED STATES OF AMERICA

Sector: 001 AGRI &amp; FOOD PRODUCTS &amp; SERVICE

Subsector: 014 MEATS &amp; MEAT BY-PRODUCTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	2500.00M	\$ 2500.00M	\$ 2400.00M	\$ 2400.00M
Canadian Exports \$	25.00M	\$ 25.00M	\$ 25.00M	\$ 25.00M
Canadian Share of Import Market	0.10%	0.10%	0.10%	0.10%

## Major Competing Countries

## Market Share

i) 112 FRANCE	095 %
ii) 093 DENMARK	005 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector:

Current status of Canadian exports:

Products/services for which there are good market prospects

Current Total Imports In Canadian \$
i) GOURMET/SPECIALTY \$ 0.00 M
ii) PATES \$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market



Export and Investment Promotion Planning System

MISSION: 602 CHICAGO

COUNTRY: 577 UNITED STATES OF AMERICA

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: AS FOLLOW-UP TO PREVIOUS INITIATIVES, CONTINUE TO RESPOND TO TRADE INQUIRIES.

Results Expected: ACTION 5 CANADIANS/5 LOCAL INQUIRIES

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: WORK CLOSELY WITH AND SUPPORT PROVINCIAL AUTHORITIES IN MONITORING TRADE/PRODUCT OPPORTUNITIES.

Results Expected: REPORT ON FINDINGS FROM 2 OUT CALLS

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 602 CHICAGO

Market: 577 UNITED STATES OF AMERICA

Sector: 001 AGRI &amp; FOOD PRODUCTS &amp; SERVICE

Subsector: 015 SEMI &amp; PROCESSED FOOD &amp; DRINK

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import)	\$ 40000.00M	\$36000.00M	\$34000.00M	\$31100.00M
Canadian Exports	\$ 225.00M	\$ 218.00M	\$ 211.00M	\$ 209.10M
Canadian Share of Import Market	0.60%	0.60%	0.60%	0.70%

Major Competing Countries	Market Share
i) 577 UNITED STATES OF AMERICA	100 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) CONVENIENCE FOODS	\$ 0.00 M
ii) HEALTH FOODS	\$ 0.00 M
iii) DELI FOODS	\$ 0.00 M
iv) ETHNIC FOODS	\$ 0.00 M
v) WINE COOLERS	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies

## Export and Investment Promotion Planning System

MISSION: 602 CHICAGO

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: INITIATE A SERIES OF 1-ON-1 MEETINGS WITH INSTITUTIONAL FOOD DISTRIBUTORS, BROKERS & ASSOCIATIONS IN CHICAGO RE: BUYING OPERATIONS/PRODUCT OPPORTUNITIES.

Results Expected: DEVELOPMENT OF A MINI-MARKET GUIDE. 8 OUT CALLS.

Activity: EVALUATION OF TASTE OF CANADA SOLO FOOD SHOW - SEPT. 1988

Results Expected: EVENT TARGET WAS MINIMUM SALES \$5 MILLION AND 10 REP/BROKERS APPOINTED

Activity: AS A FOLLOW-UP TO PREVIOUS INITIATIVES, CONTINUE TO RESPOND TO TRADE INQUIRIES.

Results Expected: ACTION 50 CDN/40 LOCAL INQUIRIES

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ASSIST WITH IMPLEMENTATION OF TASTE OF CANADA FOOD SHOW 9/88 A JOINT PROVINCIAL/FEDERAL INITIATIVE INVOLVING LOCAL OFFICERS OF ONTARIO AND QUEBEC

Results Expected: TARGET RESULTS ARE \$5 MILLION SALES AND 10 REPS APPOINTED.

Activity: ASSIST WITH IMPLEMENTATION OF NRA NATIONAL STAND/MAY 88, 10 COMPANIES.

Results Expected: TARGETED ON SITE SALES \$2 MILLION & THE APPOINTED OF 20 BROKERS/REPS RE: FOOD PRODUCT SALES. INCREASE PROFILE.

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DEPARTMENT OF EXTERNAL AFFAIRS

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Export and Investment Promotion Planning System

MISSION: 602 CHICAGO

COUNTRY: 577 UNITED STATES OF AMERICA

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: EVALUATION OF MAJOR FOOD SHOWS IN CHICAGO (NEW) PIZZA SHOW 7/88-  
FROZEN FOOD SHOW 2/88

Results Expected: WILL SUBMIT FINDINGS AND RECOMMENDATIONS IN  
REPORT FORM.

Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 602 CHICAGO

Market: 577 UNITED STATES OF AMERICA

Sector: 001 AGRI & FOOD PRODUCTS & SERVICE

Subsector: 016 AGRICULTURE MACH, EQUIP, TOOLS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	7500.00M	\$ 7400.00M	\$ 7000.00M	\$ 6808.00M
Canadian Exports \$	116.00M	\$ 115.00M	\$ 110.00M	\$ 107.00M
Canadian Share of Import Market	1.50%	1.60%	1.60%	1.60%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	079 %
ii) 265 JAPAN	000 %
iii) 237 ITALY	000 %
iv) 112 FRANCE	000 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector:

100 \$M AND UP

Current status of Canadian exports:

Mature with little growth

Products/services for which there are good market prospects

Current Total Imports In Canadian \$

i) LIVESTOCK EQUIPMENT	\$ 32.00 M
ii) SOIL PREPARATION	\$ 10.00 M
iii) HAYING AND HARVESTING	\$ 10.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- No factors reported by mission

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade fairs
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

## Export and Investment Promotion Planning System

MISSION: 602 CHICAGO

COUNTRY: 577 UNITED STATES OF AMERICA

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: DETAILED FOLLOW-UP OF 2 SOLD SHOWS (1) JOHN DEERE MISSION/BEAVER DAM, WISCONSIN WHICH WAS HELD IN CONJUNCTION WITH GOV. OF ONTARIO IN 1986 (2) 1987 MANITOBA COMPONENTS MISSION TO CHICAGO

Results Expected: REPORT EVALUATION FUTURE MISSIONS SUBJECT TO FAVORABLE RECOMMENDATIONS/SUPPORT FROM PIMA

Activity: AS FOLLOW-UP TO PREVIOUS INITIATIVES, CONTINUE TO RESPOND TO TRADE INQUIRIES

Results Expected: 10 CANADIAN INQUIRIES/4 LOCAL INQUIRIES 2 OUT CALLS

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ATTEND AND AUDIT REGIONAL FARMS SHOWS... CAPITAL CITY FARM SHOW 1/89, WORLD DAIRY EXPO 10/88 & ST. LOUIS FARM SHOW IN 10/88

Results Expected: RECOMMENDATIONS FOR MAXIMIZING CDN PRESENCE

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 602 CHICAGO

Market: 577 UNITED STATES OF AMERICA

Sector: 001 AGRI &amp; FOOD PRODUCTS &amp; SERVICE

Subsector: 017 FOOD HANDLING, PROCESSING EQUIP

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	8000.00M	\$ 7900.00M	\$ 7800.00M	\$ 7954.00M
Canadian Exports \$	19.00M	\$ 18.00M	\$ 16.00M	\$ 13.00M
Canadian Share of Import Market	0.23%	0.22%	0.20%	0.16%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA

000 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector:

15-30 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are  
good market prospectsCurrent Total Imports  
In Canadian \$

i) HI TECH FOOD EQUIPMENT

\$ 0.00 M

The Trade Office reports that the following factors influence Canadian  
export performance in this market for this sector (sub-sector).In the Trade Office's opinion, Canadian export performance in this sector  
(sub-sector) in this market is lower than optimum mainly because of:

- No factors reported by mission

Some Canadian exporters to this market in this sector(sub-sector)  
have enjoyed success previously as a result of a variety of  
factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade fairs
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

Export and Investment Promotion Planning System

MISSION: 602 CHICAGO

COUNTRY: 577 UNITED STATES OF AMERICA

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: AS FOLLOW-UP TO PREVIOUS INITIATIVES, CONTINUE TO RESPOND TO TRADE INQUIRIES

Results Expected: ACTION 20 CANADIAN/5 LOCAL INQUIRIES

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: TO ASSIST IMPLEMENTATION OF NRA NATIONAL STAND IN 1988

Results Expected: TARGET RESULTS ARE 5 REPS TO BE APPOINTED & \$1 MILLION IN EQUIPMENT SALES.

Activity: ATTEND AND MONITOR EQUIPMENT/PROCESSING SHOWS... I. E. THE AMERICAN MEAT INSTITUTE IN 10/88, DAIRY & FOOD EXPO 9/88, FOOD MARKETING INSTITUTE 5/88 (ONTARIO GOV. STAND), INTERBEV 10/88

Results Expected: RECOMMENDATIONS FOR MAXIMIZING CDN. PARTICIPATION AND PRESENCE



## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 602 CHICAGO

Market: 577 UNITED STATES OF AMERICA

Sector: 002 FISHERIES, SEA PRODUCTS &amp; SERV.

Subsector: 021 FISH &amp; SHELLFISH &amp; OTHER PROD

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import)	\$ 13400.00M	\$13000.00M	\$13000.00M	\$12600.00M
Canadian Exports	\$ 23.00M	\$ 23.00M	\$ 23.00M	\$ 22.10M
Canadian Share of Import Market	0.20%	0.20%	0.20%	0.20%

## Major Competing Countries

	Market Share
i) 410 NORWAY	000 %
ii) 265 JAPAN	000 %
iii) 370 NEW ZEALAND	000 %
iv) 078 ECUADOR	000 %
v) 577 UNITED STATES OF AMERICA	000 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 60-100 \$M

Current status of Canadian exports: Well established and growing.

Products/services for which there are good market prospects

- i) APPETIZERS - FINGERFOODS
- ii) FISH ENTREES

Current Total Imports In Canadian \$
\$ 0.00 M
\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies

## Export and Investment Promotion Planning System

MISSION: 602 CHICAGO

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: MEETINGS WITH RETAIL & INSTITUTIONAL COMPANIES IN CHICAGO (BROKERS, REPS, ETC.)

Results Expected: IMPROVE LEVEL OF COMMUNICATION WITH THE LOCAL COMMUNITY WITH RESPECT TO TRENDS & OPPORTUNITIES. 10 OUT CALLS

Activity: AS FOLLOW-UP TO PREVIOUS INITIATIVES, CONTINUE TO RESPOND TO TRADE INQUIRIES.

Results Expected: ACTION 15 CDN/5 LOCAL INQUIRIES

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ATTEND AND AUDIT BOSTON SEAFOOD SHOW (1989)

Results Expected: ENCOURAGE CDN. EXHIBITORS TO PURSUE CHICAGO MARKET. ESTABLISH 3 BUYER/DISTRIBUTOR AGREEMENTS.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 602 CHICAGO

Market: 577 UNITED STATES OF AMERICA

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Subsector: 041 AEROSPACE &amp; MARINE

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import)	\$ 6000.00M	\$ 6300.00M	\$ 6200.00M	\$ 6400.00M
Canadian Exports	\$ 95.00M	\$ 85.00M	\$ 65.00M	\$ 55.00M
Canadian Share of Import Market	1.58%	1.35%	1.04%	0.86%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	000 %
ii) 616 OTHER COUNTRIES	000 %
iii) 232 ISRAEL	000 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing.

Products/services for which there are good market prospects

## Current Total Imports

	In Canadian \$
i) PROPULSION	\$ 300.00 M
ii) MAINTENANCE & OVERHAUL	\$ 250.00 M
iii) AEROMECHANICS	\$ 200.00 M
iv) STRUCTURES	\$ 175.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- other factor(s) described by the Trade Office as follows:
  - SINGLE SOURCE PROCUREMENTS
  - SMALL BUSINESS SET ASIDES
  - CDN COMPANIES EXCLUDED FROM RESERVE ENGINEERING PROJECTS

## Export and Investment Promotion Planning System

MISSION: 602 CHICAGO

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- the presence of CIDA programs which have opened the market to Canadian companies
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada
- the existence of a bilateral economic/trade arrangement between Canada and this country

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: CONTINUED FOLLOW UP WITH PARTICIPANTS IN POST INITIATED AEROSPACE SEMINAR HELD IN ST. LOUIS IN DECEMBER 1985.

Results Expected: 3 INCREMENTAL BUYING CONNECTIONS/ \$5 MILLION

Activity: PARTICIPATE ACTIVELY IN DEA/AVSCOM DDSP JOINT WORKING GROUP

Results Expected: TO IDENTIFY AND SECURE \$25 MILLION IN NEW DDSP PROJECTS OVER 5 YEARS.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: DEVELOP DEFENSE INDUSTRIAL PROCUREMENT LIST TO INCLUDE SUBCONTRACTOR SOURCING REQUIREMENTS IN ST. LOUIS AREA.

Results Expected: TO ESTABLISH 5 BUYING CONNECTIONS LEADING TO \$5 MILLION PER YEAR.

Activity: TO ORGANIZE AN INCOMING AVSCOM SURVEY MISSION TO TORONTO, MONTREAL MAY 1988.

Results Expected: TO ESTABLISH 3 NEW BUYING CONNECTIONS.

Activity: TO ORGANIZE COMPETITION ADVOCATES SEMINARS/INCOMING FEBRUARY '89; OUTGOING SEPTEMBER '88.

Results Expected: TO INCREASE BUYER AWARENESS

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 602 CHICAGO

Market: 577 UNITED STATES OF AMERICA

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Subsector: 042 ARMAMENTS &amp; VEHICLES

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	8000.00M	\$ 8000.00M	\$ 7800.00M	\$ 7000.00M
Canadian Exports \$	75.00M	\$ 70.00M	\$ 65.00M	\$ 60.00M
Canadian Share of Import Market	0.93%	0.88%	0.83%	0.86%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	090 %
ii) 616 OTHER COUNTRIES	008 %
iii) 232 ISRAEL	001 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects

Current Total Imports

i) COMPONENTS OF WEAPON SYSTEMS	\$ 600.00 M
ii) AMMUNITION	\$ 180.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- other factor(s) described by the Trade Office as follows:
  - SINGLE SOURCE PROCUREMENTS
  - SMALL BUSINESS SET ASIDES

## Export and Investment Promotion Planning System

MISSION: 602 CHICAGO

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- the presence of CIDA programs which have opened the market to Canadian companies
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada
- the existence of a bilateral economic/trade arrangement between Canada and this country

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: IDENTIFY AND EVALUATE OPPORTUNITIES FOR CANADIAN SUPPLIERS TO DEAL WITH SUBCONTRACTORS.

Results Expected: FIVE BUYING CONNECTIONS TO LEAD TO \$5 MILLION INCREMENTAL EXPORT SALES.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: DEVELOP CLOSE WORKING RELATIONSHIP WITH MILITARY COMMANDS TO ENSURE PERSONNEL ARE AWARE OF CANADIAN CAPABILITIES AND PRODUCTS AND TO FOLLOW UP ON BEHALF OF CANADIAN COMPANIES.

Results Expected: INCREASE POTENTIAL FOR SALES AND PROVIDE FEEDBACK TO CANADIAN COMPANIES

Activity: PRODUCE SUMMARY OF PROJECT AND EQUIPMENT REQUIREMENTS ON A COMMAND-BY COMMAND BASIS.

Results Expected: INCREASE CANADIAN AWARENESS OF OPPORTUNITIES VIA WIDE DISTRIBUTION IN CANADA.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 602 CHICAGO

Market: 577 UNITED STATES OF AMERICA

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Subsector: 043 ELECTRICAL &amp; ELECTRONIC

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	3000.00M	\$ 2700.00M	\$ 3000.00M	\$ 2900.00M
Canadian Exports \$	30.00M	\$ 25.00M	\$ 22.00M	\$ 24.00M
Canadian Share of Import Market	1.00%	0.93%	0.73%	0.83%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	090 %
ii) 265 JAPAN	007 %
iii) 616 OTHER COUNTRIES	002 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 60-100 \$M

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) COMPONENTS	\$ 600.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- other factor(s) described by the Trade Office as follows:
  - SINGLE SOURCE PROCUREMENTS
  - SMALL BUSINESS SET ASIDES

## Export and Investment Promotion Planning System

MISSION: 602 CHICAGO

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- the presence of CIDA programs which have opened the market to Canadian companies
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada
- the existence of a bilateral economic/trade arrangement between Canada and this country

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: LIAISE WITH MILITARY COMMANDS IN TERRITORY TO DETERMINE POTENTIAL

Results Expected: INCREASED AWARENESS OF CANADIAN CAPABILITY.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: INCREASE EFFORTS TO IDENTIFY AND EVALUATE OPPORTUNITIES TO SUPPLY SUBCONTRACTORS.

Results Expected: FIVE BUYING CONNECTIONS RESULTING IN \$3 MILLION IN SALES.



## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 602 CHICAGO

Market: 577 UNITED STATES OF AMERICA

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV.

Subsector: 044 OTHER DEFENSE PROD &amp; SERV.

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	3000.00M	\$ 2900.00M	\$ 2800.00M	\$ 2500.00M
Canadian Exports \$	55.00M	\$ 50.00M	\$ 45.00M	\$ 40.00M
Canadian Share of Import Market	1.80%	1.70%	1.60%	1.60%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	095 %
ii) 616 OTHER COUNTRIES	003 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) DEFENSIVE CHEMICAL EQUIPMENT	\$ 65.00 M
ii) COLD WEATHER CLOTHING	\$ 20.00 M
iii) SECURITY PRODUCTS	\$ 10.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- other factor(s) described by the Trade Office as follows:
  - SINGLE SOURCES PROCUREMENTS
  - SMALL BUSINESS SET ASIDES

## Export and Investment Promotion Planning System

MISSION: 602 CHICAGO

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- the presence of CIDA programs which have opened the market to Canadian companies
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada
- the existence of a bilateral economic/trade arrangement between Canada and this country

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: CONTINUED LIAISON WITH RELEVANT MILITARY COMMANDS.

Results Expected: IMPROVE ACCESS FOR CANADIAN SUPPLIERS.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: PRODUCE "GUIDE TO THE U.S. MILITARY MARKET IN THE U.S." FOR CANADIAN EXPORTERS.

Results Expected: INCREASE POTENTIAL FOR SALES.

Activity: ORGANIZE INCOMING TROSCOM SURVEY TO TORONTO AND MONTREAL, MAY 1988

Results Expected: TO ESTABLISH THREE BUYING CONNECTIONS.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 602 CHICAGO

Market: 577 UNITED STATES OF AMERICA

Sector: 005 COMM. &amp; INFORM. EQP. &amp; SERV

Subsector: 053 TELECOMMUNICATIONS (INC SPACE)

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	3800.00M	\$ 3700.00M	\$ 3500.00M	\$ 3200.00M
Canadian Exports \$	90.00M	\$ 88.00M	\$ 85.00M	\$ 80.00M
Canadian Share of Import Market	2.40%	2.40%	2.40%	2.50%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	050 %
ii) 265 JAPAN	020 %
iii) 268 KOREA	005 %
iv) 434 TAIWAN	005 %
v) 467 SINGAPORE	005 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) TELEPHONE SWITCHING EQUIPMENT	\$ 70.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- No factors reported by mission

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

## Export and Investment Promotion Planning System

MISSION: 602 CHICAGO

COUNTRY: 577 UNITED STATES OF AMERICA

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: REPORT ON NORTH AMERICAN TELECOMMUNICATIONS ASSOCIATION (NATA) CONFERENCE SCHEDULED FOR CHICAGO 1989. OPPORTUNITIES FOR CANADIAN EQUIPMENT MANUFACTURERS.

Results Expected: 1 NEW BUYING CONNECTION

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 602 CHICAGO

Market: 577 UNITED STATES OF AMERICA

Sector: 005 COMM. &amp; INFORM. EQP. &amp; SERV

Subsector: 054 COMPUTERS, SOFTWARE &amp; SYSTEMS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	9500.00M	\$ 9000.00M	\$ 8400.00M	\$ 8200.00M
Canadian Exports \$	116.00M	\$ 109.00M	\$ 102.00M	\$ 95.00M
Canadian Share of Import Market	1.20%	1.20%	1.20%	1.20%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	050 %
ii) 265 JAPAN	020 %
iii) 268 KOREA	005 %
iv) 434 TAIWAN	005 %
v) 467 SINGAPORE	005 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) COMPUTERS	\$ 80.00 M
ii) SOFTWARE	\$ 15.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters
- other factor(s) described by the Trade Office as follows:  
COMPETITIVE PRICING IS KEY. PROXIMITY AND SIMILARITY OF PRODUCTS MAKE THIS AN EXCELLENT MARKET FOR CANADIAN EXPORTERS.

## Export and Investment Promotion Planning System

MISSION: 602 CHICAGO

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: PREPARE SOFTWARE MARKETING GUIDE LISTING MAJOR TRADE SHOWS, LOCAL AGENTS AND DISTRIBUTORS.

Results Expected: INCREMENTAL SOFTWARE SALES IN 88/89 EXPECTED TO BE \$150,000 WITH 10 NEW CANADIAN COMPANIES MAKING SALES.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: IMPLEMENT CDN PARTICIPATION IN, AND COMPLETE EVALUATION OF 3 TRADE SHOS IN 1988/89 INCLUDING (A) WORLD COMPUTER CONF., (B) PC EXPO, (C) INTERFACE, AND FOLLOW-UP OF INITIATIVES RAISED BY CANADIAN INDUSTRY.

Results Expected: 30 NEW BUYING ARRANGEMENTS TO BE ACHIEVED.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 602 CHICAGO

Market: 577 UNITED STATES OF AMERICA

Sector: 005 COMM. &amp; INFORM. EQP. &amp; SERV

Subsector: 056 ELECTRONIC COMPONENTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1825.00M	\$ 1800.00M	\$ 1750.00M	\$ 1625.00M
Canadian Exports \$	45.00M	\$ 44.00M	\$ 43.00M	\$ 40.00M
Canadian Share of Import Market	2.40%	2.40%	2.40%	2.50%

## Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	050 %
ii) 265 JAPAN	020 %
iii) 268 KOREA	005 %
iv) 434 TAIWAN	005 %
v) 467 SINGAPORE	005 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) PRINTED CIRCUIT BOARDS	\$ 50.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- No factors reported by mission

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

Export and Investment Promotion Planning System

MISSION: 602 CHICAGO

COUNTRY: 577 UNITED STATES OF AMERICA

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: REPORT ON DESIGN ENGINEERING SHOW(DES)89 REGARDING OPPORTUNITIES FOR SUB-CONTACT CIRCUIT BOARD MANUFACTURING IN CANADA. REPORT TO BE DISTRIBUTED TO DRIE AND DRIE REGIONAL OFFICES.

Results Expected: 2 NEW BUYING CONNECTIONS.



## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 602 CHICAGO

Market: 577 UNITED STATES OF AMERICA

Sector: 005 COMM. &amp; INFORM. EQP. &amp; SERV

Subsector: 057 ROBOTICS &amp; ARTIFICIAL INTELL.

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	55.00M	\$ 55.00M	\$ 55.00M	\$ 56.00M
Canadian Exports \$	1.00M	\$ 1.00M	\$ 1.00M	\$ 1.00M
Canadian Share of Import Market	2.00%	2.00%	2.00%	2.00%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	060 %
ii) 265 JAPAN	030 %
iii) 507 SWEDEN	005 %
iv) 128 GERMANY WEST	005 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 3-5 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) ROBOTS	\$ 1.00 M
ii) PERIPHERALS SUCH AS SOFTWARE & VISION SYSTEMS	\$ 0.20 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters
- other factor(s) described by the Trade Office as follows:

RECENT PULLBACK IN ROBOTICS PURCHASE BY MIDWEST AUTO INDUSTRY.  
DOMESTIC PRODUCERS HAVE RESPONDED TO STRONG FOREIGN COMPETITION BY CUTTING BACK ON MANUFACTURE OF MANY ROBOTICS PRODUCTS - ESPECIALLY BASIC UNITS.

## Export and Investment Promotion Planning System

MISSION: 602 CHICAGO

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: DISTRIBUTE RECENTLY COMPLETED MARKET ANALYSIS OF ROBOTICS INDUSTRY. ANALYSIS COMPLETED BY FEDERAL RESERVE BANK OF CHICAGO, NOV. 1987.

Results Expected: 2 NEW BUYING CONNECTIONS

Activity: WISCONSIN-BASED ASEA, A SUBSIDIARY OF ASEA OF SWEDEN, REPORTEDLY ADDS SIGNIFICANT VALUE TO ITS PROD. IN N. AMERICA. CONTACT ASEA FOR SOURCING REQUIREMENTS, INTEREST IN JOINT VENTURES & LICENSING ARRANGEMENTS(SEE INVEST. SECT. FOR OTHER ACTIV. RELATED TO ROBOTICS)

Results Expected: 2 CANADIAN COMPANIES TO MAKE \$1 MILLION SALES IN 2 YEARS. ALSO 1 NEW TECHNOLOGY INFLOW AGREEMENT.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 602 CHICAGO

Market: 577 UNITED STATES OF AMERICA

Sector: 006 ELECTRONICS EQUIP. &amp; SERV

Subsector: 061 PRODUCTS &amp; COMPONENTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	7300.00M	\$ 7200.00M	\$ 7000.00M	\$ 6500.00M
Canadian Exports \$	180.00M	\$ 175.00M	\$ 170.00M	\$ 160.00M
Canadian Share of Import Market	2.40%	2.40%	2.40%	2.50%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	050 %
ii) 265 JAPAN	020 %
iii) 268 KOREA	005 %
iv) 434 TAIWAN	005 %
v) 467 SINGAPORE	005 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) TELECOMMUNICATIONS	\$ 70.00 M
ii) TRANSPORTATIONS ELECTRONICS	\$ 40.00 M
iii) INSTRUMENTATION	\$ 30.00 M
iv) SUB-ASSEMBLIES	\$ 20.00 M
v) MICROELECTRONICS	\$ 20.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- other factor(s) described by the Trade Office as follows:

EXCELLENT MARKET POTENTIAL FOR A WIDE VARIETY OF SOPHISTICATED SYSTEMS & COMPONENTS THAT ARE USED FOR POLLUTION DETECTION, PROCESS CONTROL, SATELLITE COMMUNICATIONS AND INDUSTRIAL AND PUBLIC SERVICE APPLICATIONS.

## Export and Investment Promotion Planning System

MISSION: 602 CHICAGO

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: IMPLEMENT A "REPRESENTATIVE LOCATOR PROGRAM" TO MATCH CANADIAN EXPORTERS WITH AGENTS AND DISTRIBUTORS.

Results Expected: 10 NEW AGENTS APPOINTED

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: 20 CANADIAN COMPANIES TO REQUEST EXPORT MARKETING ASSISTANCE WITH RESPECT TO TRADE SHOW PARTICIPATION AND TO APPOINT AGENTS/DISTRIBUTORS IN MIDWEST.

Results Expected: 2 NEW AGENTS TO BE APPOINTED.

Activity: 10 MIDWEST COMPANIES TO BE ASSISTED WITH SOURCING AGENTS

Results Expected: 10 SOURCING REQUESTS TO BE ACTIONED WITH A BUYING CONNECTION ESTABLISHED.

Activity: REPORT ON ADVANCED MANUFACTURING SYSTEMS SHOW 19-21 JULY 88 TO BE DISTRIBUTED TO DRIE REGIONAL OFFICES.

Results Expected: GENERATE 5 SOURCING LEADS FOR ELECTRONIC COMPONENTS FOR ACTION AND FOLLOW-UP BY CANADIAN EXPORTERS.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 602 CHICAGO

Market: 577 UNITED STATES OF AMERICA

Sector: 008 TRANSPORT SYS, EQUIP, COMP, SERV.

Subsector: 081 AUTOMOTIVE

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	33000.00M	\$33000.00M	\$32000.00M	\$32000.00M
Canadian Exports \$	1507.00M	\$ 1505.00M	\$ 1503.00M	\$ 1502.00M
Canadian Share of Import Market	4.68%	4.70%	4.70%	4.69%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	070 %
ii) 265 JAPAN	015 %
iii) 434 TAIWAN	005 %
iv) 268 KOREA	003 %
v) 128 GERMANY WEST	002 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Mature with little growth

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) PARTS & ACCESSORIES	\$ 2500.00 M
ii) ENGINES & PARTS	\$ 1500.00 M
iii) TRUCK, TRACTORS & CHASSIS	\$ 1000.00 M

The Trade Office reports that the following factors influence Canadian  
export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector  
(sub-sector) in this market is lower than optimum mainly because of:

- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies

## Export and Investment Promotion Planning System

MISSION: 602 CHICAGO

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada
- the existence of a bilateral economic/trade arrangement between Canada and this country
- the availability of competitive Canadian financing

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: CONTINUE TO DEVELOP AGENTS, REPS & DISTRIBUTORS IN AFTERMARKET SALES & DISTRIBUTION NETWORK AND ENCOURAGE THEM TO DEAL WITH CANADIAN FIRMS.

Results Expected: IDENTIFY 15 NEW POTENTIAL AGENTS, REPS, AND DISTRIBUTORS FOR CANADIAN COMPANIES.

Activity: IDENTIFY KEY BUYERS IN THE AUTOMOTIVE AFTERMARKET FOR CANADIAN COMPANIES TO CALL ON

Results Expected: IDENTIFY TEN NEW POTENTIAL BUYERS

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ASSIST IN IMPLEMENTATION OF CANADIAN GOVERNMENT PARTICIPATION IN APAA, AUGUST 88 AND AUTOFACT, OCTOBER 88, TRADE SHOWS & FOLLOW-UP WITH RESPONSIVE WORK LOAD ARISING FROM SHOWS.

Results Expected: 10 NEW SALES ARRANGEMENTS AND 10 NEW AGENCY/ REP APPOINTMENTS

Activity: SURVEY CURRENT REQUIREMENTS OF TERRITORY MANUFACTURERS FOR USE BY CANADIAN COMPONENT MANUFACTURERS. HIGHLIGHTING AREAS OF OPPORTUNITY

Results Expected: 2 BUYING CONNECTIONS ARRANGED

Export and Investment Promotion Planning System

MISSION: 602 CHICAGO

COUNTRY: 577 UNITED STATES OF AMERICA

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: PROMOTE CONSULATE GENERAL AND WIN AS AN "AID IN SOURCING" FOR PURCHASING AGENTS THROUGH THE CHICAGO PURCHASING MANAGEMENT ASSOC

Results Expected: GENERATE 100 LOCAL SOURCING ENQUIRIES FROM PURCHASING AGENTS TO BE FOLLOWED UP BY CDN EXPORTERS.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 602 CHICAGO

Market: 577 UNITED STATES OF AMERICA

Sector: 008 TRANSPORT SYS, EQUIP, COMP, SERV.

Subsector: 082 URBAN TRANSIT

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	400.00M	\$ 50.00M	\$ 50.00M	\$ 180.00M
Canadian Exports \$	36.00M	\$ 0.00M	\$ 2.00M	\$ 2.00M
Canadian Share of Import Market	9.00%	0.00%	4.00%	1.00%

## Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	060 %
ii) 128 GERMANY WEST	020 %
iii) 265 JAPAN	020 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 60-100 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are  
good market prospects

Current Total Imports

In Canadian \$

i) LIGHT RAIL CARS	\$ 0.00 M
ii) SUBWAY CARS	\$ 0.00 M
iii) PASSENGER RAIL CARS	\$ 0.00 M
iv) BUS REPLACEMENT PARTS	\$ 0.00 M
v) FARE BOXES	\$ 0.00 M
vi) BUS SHELTERS	\$ 0.00 M

Projects or portion of projects which are still in the planning  
stage and for which Canadian companies might have reasonable prospects.

i) Project Name: ST. LOUIS LIGHT RAIL PROJECT  
Approximate Value: \$ 360 M  
Financing Source: 025 OTHER  
For further info. please contact:  
ST. LOUIS TRADE OFFICE R. CROUGH, 314/862-4903

ii) Project Name: RTA HANDICAP ACCESS RETROFIT  
Approximate Value: \$ 10 M  
Financing Source: 025 OTHER  
For further info. please contact:  
CHICAGO CONSULATE N. CORNELL, 312/427-1031



## Export and Investment Promotion Planning System

MISSION: 602 CHICAGO

COUNTRY: 577 UNITED STATES OF AMERICA

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- there are import restrictions which can present significant problems
- the degree of import duty protection of local industry tends to be high

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- No factors reported by mission

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada
- the availability of competitive Canadian financing

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: ST. LOUIS LIGHT RAIL PROJECT HAVING TROUBLE GETTING FUNDING RELEASED BY US DOT

Results Expected: \$36 M CAR ORDER EXPECTED AUGUST 88

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ONGOING CONTACT AT RTA AND CTA ABOUT RETROFITTING RAIL CARS AND REPLACEMENT FOR CHICAGO PROPERTIES

Results Expected: \$10 M ORDER TO RETROFIT RAIL CARS TO ALLOW HANDICAP ACCESS.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 602 CHICAGO

Market: 577 UNITED STATES OF AMERICA

Sector: 008 TRANSPORT SYS, EQUIP, COMP, SERV.

Subsector: 083 MARINE INDUSTRIES

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	660.00M	\$ 616.00M	\$ 560.00M	\$ 520.00M
Canadian Exports \$	19.00M	\$ 17.00M	\$ 14.00M	\$ 12.00M
Canadian Share of Import Market	2.90%	2.70%	2.50%	2.30%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	070 %
ii) 620 EUROPE	005 %
iii) 265 JAPAN	003 %
iv) 434 TAIWAN	002 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 30-60 \$M

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) POWER BOATS	\$ 68.00 M
ii) SAILBOATS	\$ 6.00 M
iii) ACCESSORIES	\$ 5.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies

## Export and Investment Promotion Planning System

MISSION: 602 CHICAGO

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: MARKET GUIDE PROVIDING DISTRIBUTION CHANNELS, AGENTS & DISTRIBUTORS WAS RESEARCHED. DOCUMENTATION IS STILL CURRENT AND GUIDE SHOULD BE COMPLETED.

Results Expected: TEN CANADIAN COMPANIES TO APPOINT NEW AGENTS AND DISTRIBUTORS. \$300,000 NEW BUSINESS INFLUENCED.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: SEND BUYERS TO TORONTO BOAT SHOW

Results Expected: FIVE CANADIAN COMPANIES TO MAKE SALES AGGREGATING \$300,000 NEW BUSINESS.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 602 CHICAGO

Market: 577 UNITED STATES OF AMERICA

Sector: 009 FOREST PRODUCTS, EQUIP, SERVICES

Subsector: 092 WOOD AND WOOD PRODUCTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	3000.00M	\$ 2820.00M	\$ 2800.00M	\$ 2540.00M
Canadian Exports \$	960.00M	\$ 850.00M	\$ 924.00M	\$ 838.00M
Canadian Share of Import Market	32.00%	30.00%	33.00%	33.00%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	050 %
ii) 612 SCANDINAVIA	005 %
iii) 614 SOUTH AMERICA	003 %
iv) 011 AUSTRALIA	002 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Mature with little growth

## Products/services for which there are good market prospects

## Current Total Imports

## In Canadian \$

i) S. P. F.	\$ 0.00 M
ii) MILLED/TURNED PRODUCTS	\$ 0.00 M
iii) MOULDINGS	\$ 0.00 M
iv) VALUE ADDED PRODUCTS	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- there are import restrictions which can present significant problems
- the degree of import duty protection of local industry tends to be low
- approval of technical standards can present problems in the case of some imported products

## Export and Investment Promotion Planning System

MISSION: 602 CHICAGO

COUNTRY: 577 UNITED STATES OF AMERICA

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- No factors reported by mission

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: WORK WITH COFI TO IDENTIFY POTENTIAL MARKETS FOR VALUE ADDED WOOD PRODUCTS. INCLUDES ANALYSIS OF CURRENT STANDARDS.

Results Expected: TWO NICHEs IDENTIFIED FOR TWO CANADIAN EXPORTERS RESULTING IN \$200,000 ADDITIONAL SALES.

Activity: CONTINUE LIAISON WITH NAWLA ON TRADE ISSUES.

Results Expected: PROVIDE RELEVANT INFORMATION AND SPEAKERS FOR POLICY CONSIDERATION.

Activity: RESPONSIVE WORK LOAD.

Results Expected: THREE COMPANIES WILL APPOINT AGENTS/MAKE \$300,000 SALES INTO TERRITORY.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 602 CHICAGO

Market: 577 UNITED STATES OF AMERICA

Sector: 009 FOREST PRODUCTS, EQUIP, SERVICES

Subsector: 094 PULP AND PAPER PRODUCTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import)	\$ 38000.00M	\$36500.00M	\$36000.00M	\$35500.00M
Canadian Exports	\$ 1250.00M	\$ 1200.00M	\$ 1144.00M	\$ 1000.00M
Canadian Share of Import Market	3.30%	3.30%	3.20%	2.80%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	085 %
ii) 612 SCANDINAVIA	005 %
iii) 047 BRAZIL	005 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects

Current Total Imports

In Canadian \$

i) NEWSPRINT	\$ 0.00 M
ii) SPECIALTY PAPER	\$ 0.00 M
iii) PRINTING PAPER	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- No factors reported by mission

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada

Export and Investment Promotion Planning System

MISSION: 602 CHICAGO

COUNTRY: 577 UNITED STATES OF AMERICA

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: FOLLOW UP PAPER SOURCING REQUESTS GENERATED BY GRAPH EXPO PARTICIPATION.

Results Expected: 3 MILLS WILL MAKE CONTACT WITH POTENTIAL NEW CUSTOMERS.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: RESPOND TO SOURCING REQUESTS IN THE FACE OF CONTRACTING WORLD WIDE PAPER SUPPLY.

Results Expected: 5 MILLS WILL MAKE CONTACT WITH POTENTIAL NEW CUSTOMERS.

Activity: ANALYSIS OF SPECIALTY PAPER NEEDS IN TERRITORY TO INCLUDE CDN CAPABILITY/INTEREST IN MEETING NEED.

Results Expected: 2 MILLS WILL SERIOUSLY CONSIDER NEW CUSTOMERS IN TERRITORY.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 602 CHICAGO

Market: 577 UNITED STATES OF AMERICA

Sector: 010 MINE, METAL, MINERAL PROD &amp; SRV

Subsector: 104 METALS, PRIMARY &amp; FABRICATED

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	3500.00M	\$ 3409.00M	\$ 3219.00M	\$ 3040.00M
Canadian Exports \$	90.00M	\$ 87.00M	\$ 81.00M	\$ 77.00M
Canadian Share of Import Market	2.70%	2.60%	2.50%	2.50%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	087 %
ii) 265 JAPAN	000 %
iii) 128 GERMANY WEST	000 %
iv) 051 UNITED KINGDOM	000 %
v) 349 MEXICO	000 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Mature with little growth

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) METAL FABRICATIONS	\$ 20.00 M
ii) INVESTMENT	\$ 9.00 M
iii) PRECISION COMPONENTS	\$ 6.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- No factors reported by mission



## Export and Investment Promotion Planning System

MISSION: 602 CHICAGO

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada
- the existence of a bilateral economic/trade arrangement between Canada and this country

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

- sourcing assistance from Canadian federal/provincial governments departments

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: RESPONSIVE WORKLOAD - MODERATE FROM TERRITORY.

Results Expected: TWO BUYING CONNECTIONS RESULTING

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: SURVEY OF MAJOR MACHINE MANUFACTURERS TO DETERMINE MARKET POTENTIAL FOR CANADIAN METAL FABRICATORS.

Results Expected: IDENTIFICATION OF LEADS FOR FIVE BUYING CONNECTIONS FOR \$5 MILLION IN NEW EXPORT SALES IN TWO YEARS.

Activity: PROMOTE CONSULATE GENERAL AND WIN AS AN "AID IN SOURCING" FOR PURCHASING AGENTS THROUGH THE CHICAGO PURCHASING MANAGEMENT ASSOCIATION. ALSO, EXHIBIT AT PMA TRADE FAIR AND MEETING, APRIL 1988.

Results Expected: GENERATE 100 LEADS FOR CANADIAN COMPANIES TO FOLLOW UP.

Export and Investment Promotion Planning System

MISSION: 602 CHICAGO

COUNTRY: 577 UNITED STATES OF AMERICA

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ASSIST IN IMPLEMENTATION OF CANADIAN GOVERNMENT PARTICIPATION IN MATERIALS, APPLICATIONS & SERVICES EXPOSITION SPONSORED BY AMERICAN SOCIETY OF METALS INDUSTRY, SEPTEMBER 1988.

Results Expected: TEN NEW SALES ARRANGEMENTS AND FIVE NEW AGENCY/REP APPOINTMENTS

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 602 CHICAGO

Market: 577 UNITED STATES OF AMERICA

Sector: 010 MINE, METAL, MINERAL PROD &amp; SRV

Subsector: 106 EQUIPMENT AND MACHINERY

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	3545.00M	\$ 3409.00M	\$ 3219.00M	\$ 3040.00M
Canadian Exports \$	98.00M	\$ 87.00M	\$ 81.00M	\$ 77.00M
Canadian Share of Import Market	3.00%	2.60%	2.50%	2.50%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	087 %
ii) 265 JAPAN	000 %
iii) 128 GERMANY WEST	000 %
iv) 051 UNITED KINGDOM	000 %
v) 349 MEXICO	000 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Mature with little growth

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) RESOURCE RECOVERY SYSTEM	\$ 0.00 M
ii) COAL MINING MACHINERY	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- exports of certain products or services to this country are subject to Canadian export controls

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- non-tariff protectionist measures which are difficult to overcome

## Export and Investment Promotion Planning System

MISSION: 602 CHICAGO

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- competitive export pricing for this market
- strong sectoral capability in Canada
- the existence of a bilateral economic/trade arrangement between Canada and this country

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ASSIST IN IMPLEMENTING NATIONAL STAND PARTICIPATION AT MINEXPO, APRIL 1988, AND FOLLOW UP WITH RESULTS ON SHOW PARTICIPATION.

Results Expected: TEN NEW AGENCIES TO BE ESTABLISHED.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 602 CHICAGO

Market: 577 UNITED STATES OF AMERICA

Sector: 012 PETROCHEM &amp; CHEM PROD, EQP, SERV

Subsector: 123 PLASTICS PRODUCTS, EQUIP, SERVIC

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1569.00M	\$ 1509.00M	\$ 1444.00M	\$ 1375.00M
Canadian Exports \$	500.00M	\$ 452.00M	\$ 448.00M	\$ 413.00M
Canadian Share of Import Market	32.00%	30.00%	31.00%	30.00%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	070 %
ii) 265 JAPAN	010 %
iii) 434 TAIWAN	005 %
iv) 268 KOREA	005 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 60-100 \$M

Current status of Canadian exports: Well established and growing

Products/services for which there are  
good market prospects

Current Total Imports

i) PLASTIC MATERIALS &amp; RESINS

In Canadian \$

ii) PLASTICS PRODUCTS

\$ 559.00 M

\$ 1719.00 M

The Trade Office reports that the following factors influence Canadian  
export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector  
(sub-sector) in this market is lower than optimum mainly because of:

- non competitive pricing
- the unsuitability of Canadian products for this market
- the apparent limited sectoral capability in Canada compared to other competing export countries
- difficulties of adaptation of marketing techniques to the market by some Canadian companies

## Export and Investment Promotion Planning System

MISSION: 602 CHICAGO

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade fairs
- competitive export pricing for this market
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: FOLLOW UP WITH OUTSTANDING COMPANIES FROM MISSION TO ST. LOUIS ON "SELLING TO THE U. S. GOVERNMENT" SEMINAR

Results Expected: FIVE CANADIAN COMPANIES TO SELL TOTAL OF \$5M OF NEW BUSINESS

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ASSIST IN IMPLEMENTATION OF CANADIAN GOVERNMENT NATIONAL STAND PARTICIPATION IN NATIONAL PLASTICS EXPO, JUNE 1988 AND NAZ MAT, MARCH 1988 AND UNDERTAKE RELATED FOLLOW UP

Results Expected: TEN CANADIAN COMPANIES TO MAKE INITIAL SALES ARRANGEMENTS WITH U. S. BUYERS AND TEN APPOINT AGENTS

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 602 CHICAGO

Market: 577 UNITED STATES OF AMERICA

Sector: 013 CONSUMER PRODUCTS

Subsector: 131 APPAREL (CLOTH, FUR, SHOES) TEXT

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1.08M	\$ 1.05M	\$ 1.02M	\$ 1002.00M
Canadian Exports \$	25.00M	\$ 23.00M	\$ 22.00M	\$ 20.00M
Canadian Share of Import Market	0.02%	0.02%	0.02%	0.60%

## Major Competing Countries

## Market Share

i) 434 TAIWAN	008 %
ii) 189 HONG KONG	014 %
iii) 268 KOREA	009 %
iv) 431 PHILIPPINES	015 %
v) 192 PEOPLE'S REP OF CHINA	004 %
vi) 577 UNITED STATES OF AMERICA	050 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) OUTERWEAR	\$ 0.00 M
ii) FURS	\$ 0.00 M
iii) DESIGNER CLOTHING	\$ 0.00 M
iv) CHILDRENS WEAR	\$ 0.00 M
v) LARGE SIZES	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be moderate

## Export and Investment Promotion Planning System

MISSION: 602 CHICAGO

COUNTRY: 577 UNITED STATES OF AMERICA

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- high tariffs

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- competitive export pricing for this market

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: EXPLORE WITH LOCAL CHICAGO TRADE ASSOCIATIONS & CHICAGO APPAREL/TRADE CENTER OPPORTUNITIES FOR THESE GROUPS TO ASSIST IN ESTABLISHING BUYER/AGENT CONNECTIONS

Results Expected: APPOINT 3 NEW REPRESENTATIVES

Activity: AS FOLLOW-UP TO PREVIOUS INITIATIVES, CONTINUE TO RESPOND TO TRADE INQUIRIES.

Results Expected: ACTION 20 CDN/35 LOCAL INQUIRIES FOR MARKET ASSISTANCE.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: SUPPORT INCOMING BUYERS MISSION TO FESTIVAL OF FASHION TRADE SHOW MARCH 1988/TORONTO

Results Expected: RECRUIT 20 BUYERS. ESTABLISH ON-SITE SALES \$1.5 MILLION

Activity: INVESTIGATE OPPORTUNITY TO PRESENT SOLO OUTERWEAR SHOW. WILL CANVAS LOCAL MARKET RECEPTIVITY AND DETERMINE SUPPORT FROM UTW, DRIE AND CANADIAN MANUFACTURERS.

Results Expected: ENSURE OUTERWEAR STUDY/STRATEGY IS PUT TO GOOD USE. IDENTIFY 100 NEW BUYERS. APPOINT 5 NEW REPRESENTATIVES.



Export and Investment Promotion Planning System

MISSION: 602 CHICAGO

COUNTRY: 577 UNITED STATES OF AMERICA

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ATTEND 10 TRADE SHOWS HELD AT THE CHICAGO APPAREL CENTER TO ASSESS MARKET TRENDS, IDENTIFY POTENTIAL REPS & BUYERS FOR ALL APPAREL LINES.

Results Expected: DEVELOPMENT OF POST PROFILE OF BUYERS AND AGENTS FOR DISTRIBUTION TO CDN. MANUFACTURERS.  
15 OUT CALLS.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 602 CHICAGO

Market: 577 UNITED STATES OF AMERICA

Sector: 013 CONSUMER PRODUCTS

Subsector: 134 LEISURE PROD. TOOLS HARDWARE

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	36410.00M	\$34680.00M	\$33100.00M	\$31460.00M
Canadian Exports \$	0.00M NA	\$ 0.00M NA	\$ 0.00M NA	\$ 0.00M NA
Canadian Share of Import Market	0.00%	0.00%	0.00%	0.00%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	050 %
ii) 434 TAIWAN	025 %
iii) 268 KOREA	010 %
iv) 265 JAPAN	010 %
v) 128 GERMANY WEST	003 %
vi) 051 UNITED KINGDOM	002 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 30-60 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are  
good market prospects

## Current Total Imports

	In Canadian \$
i) HARDWARE	\$ 47000.00 M
ii) HOUSEWARES	\$ 31400.00 M
iii) SPORTING GOODS	\$ 10000.00 M
iv) TOYS & GAMES	\$ 1650.00 M

The Trade Office reports that the following factors influence Canadian  
export performance in this market for this sector (sub-sector).

- approval of technical standards can present problems in the case of  
some imported products

## Export and Investment Promotion Planning System

MISSION: 602 CHICAGO

COUNTRY: 577 UNITED STATES OF AMERICA

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: HAVE 1983 HARDWARE MARKET STUDY UPDATED AND ATTACH GUIDE TO BUYERS IN TERRITORY: SEARS, ACE, COTTER

Results Expected: INFORMATION FOR CANADIAN INDUSTRY.

Activity: FOLLOW UP ON INCOMING BUYERS MISSION TO CSGA SHOW, FEB. 88

Results Expected: 3 SALES ARRANGEMENTS REPRESENTING INCREMENTAL SALES OF \$100,000

Activity: FOLLOW UP TO 1987 PARTICIPATION IN: (A) HARDWARE SHOW; (B) HOME CENTER SHOW; (C) HOUSEWARES SHOW; (D) NATIONAL SPORTING GOODS SHOW, INCLUDING HANDLING RESPONSIVE WORKLOAD

Results Expected: 20 NEW AGENTS AND 20 NEW SALES CONNECTIONS WILL BE REPORTED

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: WRITE/PRODUCE GUIDE TO HOUSEWARES DISTRIBUTION CHANNELS IN THE MIDWEST, ENTITLED "EFFECTIVE HOUSEWARES MARKETING"

Results Expected: 5 NEW COMPANIES WILL LOCATE AGENTS/DISTRIBUTOR AS RESULT OF DISTRIBUTION OF STUDY TO CANADIAN INDUSTRY.

Export and Investment Promotion Planning System

MISSION: 602 CHICAGO

COUNTRY: 577 UNITED STATES OF AMERICA

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: COORDINATE AD INSERT FOR SPORTING GOODS INDUSTRY IN JULY ISSUE OF NATIONAL TRADE MAGAZINE.

Results Expected: INCREASED EXPOSURE OF CANADIAN PRODUCTS TO AN INFLUENTIAL AUDIENCE.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 602 CHICAGO

Market: 577 UNITED STATES OF AMERICA

Sector: 013 CONSUMER PRODUCTS

Subsector: 135 FURNITURE &amp; APPLIANCES

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	180.00M	\$ 170.00M	\$ 168.00M	\$ 165.00M
Canadian Exports \$	21.00M	\$ 20.00M	\$ 20.00M	\$ 18.00M
Canadian Share of Import Market	11.60%	11.70%	11.90%	10.90%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	066 %
ii) 093 DENMARK	003 %
iii) 434 TAIWAN	016 %
iv) 237 ITALY	004 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are  
good market prospects

Current Total Imports  
In Canadian \$

i) CONTRACT FURNITURE	\$ 0.00 M
ii) K. D. FURNITURE	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian  
export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector  
(sub-sector) in this market is lower than optimum mainly because of:

- difficulties of adaptation of marketing techniques to the market by  
some Canadian companies

Some Canadian exporters to this market in this sector(sub-sector)  
have enjoyed success previously as a result of a variety of  
factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market

## Export and Investment Promotion Planning System

MISSION: 602 CHICAGO

COUNTRY: 577 UNITED STATES OF AMERICA

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: AS FOLLOW-UP TO PREVIOUS INITIATIVES, CONTINUE TO RESPOND TO TRADE INQUIRIES

Results Expected: ACTION 15 CDN/10 LOCAL INQUIRIES 2 OUT CALLS TO TRADE ASSOCIATIONS

Activity: CONTINUE MONITORING/SUPPORTING ANY CANADIAN INTEREST IN RESTAURANT/INTERIOR DESIGN SHOW, MARCH 1989.

Results Expected: TO BE DETERMINED

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: SUPPORT INCOMING BUYERS PROGRAM FOR CONTRACT FURNITURE (IIDEX 11/88 - TORONTO) AND RESIDENTIAL MONTREAL FURNITURE FAIR 6/88.

Results Expected: RECRUIT 10 BUYERS TO IIDEX. RECRUIT 6 BUYERS TO MONTREAL FURNITURE. INCREASE EXPOSURE TO CANADIAN CAPABILITY.

Activity: ASSIST IN IMPLEMENTATION OF NATIONAL STAND AT NATIONAL CASUAL FURNITURE MARKET 9/88 AS DISCUSSED WITH H. W. GUY, JOANNE LEGAULT AND ANGELE LEDUC

Results Expected: APPOINT 20 AGENTS AND 40 NEW SALES AGREEMENTS AGGREGATING \$1 MILLION

Activity: RECEPTION HOSTED BY CCG/CHICAGO EXHIBITORS AT NEOCON

Results Expected: INCREASE SALES BY RAISING OVERALL PROFILE. ASSIST AND PROMOTE OLD AND NEW INDUSTRY PLAYERS.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 602 CHICAGO

Market: 577 UNITED STATES OF AMERICA

Sector: 014 EDUCATION, MEDICAL, HEALTH PROD

Subsector: 142 HOSP. &amp; MEDICAL EQUIP, INSTRUM.

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	200.00M	\$ 200.00M	\$ 180.00M	\$ 180.00M
Canadian Exports \$	6.40M	\$ 6.00M	\$ 5.80M	\$ 5.80M
Canadian Share of Import Market	3.20%	3.00%	3.20%	3.20%

## Major Competing Countries

Market Share

- |                                  |       |
|----------------------------------|-------|
| i) 577 UNITED STATES OF AMERICA  | 000 % |
| ii) 609 EUROPEAN COMMON MARKET C | 000 % |
| iii) 265 JAPAN                   | 000 % |

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector:

Current status of Canadian exports:

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- other factor(s) described by the Trade Office as follows:

THIS SECTOR IS EXTREMELY COMPETITIVE AND HAS EXPERIENCED A LACK LUSTER PERFORMANCE OF ANY SIGNIFICANT GROWTH OVER THE LAST 10 YEARS. NEVERTHELESS WITH THE NEW HIGH TECHNOLOGY PRODUCTS, THE AVERAGE GROWTH IS EXPECTED TO BE 4.9% FROM 1986 - 1991.

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- competitive export pricing for this market

Export and Investment Promotion Planning System

MISSION: 602 CHICAGO

COUNTRY: 577 UNITED STATES OF AMERICA

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: CANVAS AREA FOR POTENTIAL REPS & DISTRIBUTORS BY CLASSIFICATION OF SUBJECT PRODUCTS

Results Expected: UPDATE PAST PROFILE FOR AVAILABILITY TO CDN. MFGS. SOURCING CHANNELS OF DISTRIBUTION IN THIS TERRITORY.

Activity: AS FOLLOW-UP TO PREVIOUS INITIATIVES, CONTINUE TO RESPOND TO TRADE INQUIRIES.

Results Expected: ACTION 10 CDN/5 AMERICAN INQUIRIES. APPOINT 2 REPRESENTATIVES



## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 602 CHICAGO

Market: 577 UNITED STATES OF AMERICA

Sector: 015 CONSTRUCTION INDUSTRY

Subsector: 151 BUILDING PRODUCTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1500.00M	\$ 2000.00M	\$ 450.00M	\$ 400.00M
Canadian Exports \$	0.00M	\$ 0.20M	\$ 0.10M	\$ 0.10M
Canadian Share of Import Market	0.00%	0.00%	0.00%	0.00%

## Major Competing Countries

## Market Share

- i) 577 UNITED STATES OF AMERICA
- ii) 26B KOREA

095 %  
005 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector:

3-5 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports In Canadian \$

- i) ALL STEEL
- ii) HVAC EQUIPMENT
- iii) HARDWARE

\$ 0.00 M  
\$ 0.00 M  
\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- approval of technical standards can present problems in the case of some imported products

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- difficulties of adaptation of marketing techniques to the market by some Canadian companies

## Export and Investment Promotion Planning System

MISSION: 602 CHICAGO

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: IMPLEMENT PLANNED INFORMATION BOOTH AT CONSTRUCTION WORLD SHOW, DECEMBER 1988.

**Results Expected:**

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: EXPAND AND UPDATE CONSTRUCTION MARKET SURVEY, COMPLETED 1987, FOR ILLINOIS, WISCONSIN & MISSOURI.

Results Expected: 4 NEW COMPANIES WILL SELL INTO TERRITORY.  
TOTAL SALES \$1M.

Activity: FOLLOW UP TO PLANNED INFORMATION BOOTH AT CONSTRUCTION WORLD SHOW, DECEMBER 1988.

Results Expected: 6 CANADIAN COMPANIES WILL SELL PRODUCTS.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 602 CHICAGO

Market: 577 UNITED STATES OF AMERICA

Sector: 015 CONSTRUCTION INDUSTRY

Subsector: 153 ARCHITECT, CONSTRUCT SERVICES

Statistical Data On: Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	80.00M	\$ 100.00M	\$ 9.00M	\$ 10.00M
Canadian Exports \$	0.00M	\$ 0.00M	\$ 0.20M	\$ 0.00M
Canadian Share of Import Market	0.00%	0.00%	0.00%	0.00%

## Major Competing Countries

## Market Share

- i) 577 UNITED STATES OF AMERICA
- ii) 265 JAPAN

090 %  
010 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector:

100 \$M AND UP

Current status of Canadian exports: Small but expanding

Products/services for which there are  
good market prospects

Current Total Imports

- i) ARCHITECTURE
- ii) CONSULTING ENGINEERS

In Canadian \$  
\$ 0.00 M  
\$ 0.00 M

The Trade Office reports that the following factors influence Canadian  
export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be high

In the Trade Office's opinion, Canadian export performance in this sector  
(sub-sector) in this market is lower than optimum mainly because of:

- non-tariff protectionist measures which are difficult to overcome

Some Canadian exporters to this market in this sector(sub-sector)  
have enjoyed success previously as a result of a variety of  
factors which the trade office reports to include:

- No factors reported by mission

Export and Investment Promotion Planning System

MISSION: 602 CHICAGO

COUNTRY: 577 UNITED STATES OF AMERICA

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: POST WILL PERFORM IN-HOUSE VALUATION OF PROBLEMS AND OPPORTUNITIES IN ARCHITECTURE/ENGINEERING/CONSTRUCTION

Results Expected: ONE CANADIAN ENGINEERING COMPANY TO ENTER JOINT PROJECT/MARKETING VENTURE WITH A U.S. ASSOCIATE

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 602 CHICAGO

Market: 577 UNITED STATES OF AMERICA

Sector: 016 INDUSTRIAL MACHIN, PLANTS, SERV.

Subsector: 161 MANUFACT &amp; MATERIAL PLANT, EQP.

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	3625.00M	\$ 3520.00M	\$ 3397.00M	\$ 3280.00M
Canadian Exports \$	235.00M	\$ 228.00M	\$ 220.00M	\$ 213.00M
Canadian Share of Import Market	6.50%	6.50%	6.50%	6.50%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	089 %
ii) 265 JAPAN	000 %
iii) 128 GERMANY WEST	000 %
iv) 051 UNITED KINGDOM	000 %
v) 349 MEXICO	000 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector:

100 \$M AND UP

Current status of Canadian exports:

Mature with little growth

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) MATERIAL HANDLING	\$ 30.00 M
ii) MINING	\$ 30.00 M
iii) METAL WORKING	\$ 20.00 M
iv) INDUSTRIAL MACHINERY	\$ 28.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- No factors reported by mission

## Export and Investment Promotion Planning System

MISSION: 602 CHICAGO

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada
- the existence of a bilateral economic/trade arrangement between Canada and this country

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: DETERMINE POTENTIAL FOR EQUIPMENT AND MACHINERY AND UNDERTAKE POST PRODUCED REGIONAL MARKET STUDY

Results Expected: IDENTIFICATION OF NEW MARKET OPPORTUNITIES.

Activity: MAKE TWELVE OUTCALLS ON PUBLIC/PRIVATE SECTOR FIRMS TO PROMOTE CANADIAN PRODUCTS AND GATHER MARKET DATA

Results Expected: THREE NEW BUYER CONNECTIONS TO RESULT

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: DEVELOP "HOW, WHO WHERE" GUIDE TO MARKETING ENVIRONMENTAL EQUIPMENT IN THE WISCONSIN, ILLINOIS AND MISSOURI TERRITORY

Results Expected: INFORMATION FOR CANADIAN EXPORTERS TO LEAD TO APPOINTMENT OF THREE NEW REPS

Activity: DEVELOP "LIST OF BUYERS OF MANUFACTURING EQUIPMENT AND MATERIALS HANDLING EQUIPMENT" FOR USE BY CANADIAN COMPANIES IN MARKETING EFFORT.

Results Expected: INFORMATION FOR CANADIAN EXPORTERS TO LEAD TO FIVE NEW BUYER CONNECTIONS

Activity: ASSIST IN IMPLEMENTATION OF CDN TRADE FAIR PARTICIPATION IN CONTROL ENGINEERING, MAY 1988; DESIGN ENGINEERING, MARCH 1988; ADVANCED MFG. SYSTEMS, JULY 1988, AND UNDERTAKE RELATED FOLLOW UP ACTION.

Results Expected: 20 CANADIAN COMPANIES TO MAKE INITIAL SALES ARRANGEMENTS WITH U. S. BUYERS & 10 TO APPOINT AGENTS.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 602 CHICAGO

Market: 577 UNITED STATES OF AMERICA

Sector: 016 INDUSTRIAL MACHIN. PLANTS, SERV.

Subsector: 163 TOOLS &amp; HARDWARE

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	860.00M	\$ 868.00M	\$ 881.00M	\$ 892.00M
Canadian Exports \$	12.90M	\$ 13.00M	\$ 13.20M	\$ 13.40M
Canadian Share of Import Market	1.50%	1.50%	1.50%	1.50%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	097 %
ii) 448 PORTUGAL	001 %
iii) 265 JAPAN	001 %
iv) 128 GERMANY WEST	001 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 30-60 \$M

Current status of Canadian exports: Mature with little growth

Products/services for which there are good market prospects

Current Total Imports

i) TOOLS, DIES & MOLDS	\$ 1.00 M
ii) SPECIALIZED TOOLS	\$ 4.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- No factors reported by mission

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- use of Canadian Government export promotion activities
- competitive export pricing for this market

## Export and Investment Promotion Planning System

MISSION: 602 CHICAGO

COUNTRY: 577 UNITED STATES OF AMERICA

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: CONSIDER THE DEVELOPMENT OF A FOLLOW UP PROGRAM TO DEPARTMENTAL SPONSORED TOOL & DIE MARKET STUDY 1987 ASSUMING THERE IS EXPORTER INTEREST IN PURSUING MARKET OPPORTUNITIES.

**Results Expected:**

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ASSIST IN IMPLEMENTATION OF CANADIAN GOVERNMENT NATIONAL STAND IN INTERNATIONAL MACHINE TOOL SHOW, SEPTEMBER 1988, AND UNDERTAKE RELATED FOLLOW UP ACTION.

Results Expected: 10 CDN COMPANIES TO MAKE INITIAL SALES ARRANGEMENTS WITH U.S. BUYERS AND 10 TO APPOINT AGENTS.



Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 602 CHICAGO

Country: 577 UNITED STATES OF AMERICA

## Highlights of Investment Environment

Estimated Value Of Equity Investment  
In Canada From This Post Territory:

\$ 2 500.00 M

Estimated Value Of Annual Direct Equity  
Investments To All Destinations From  
This Post Territory:

\$ 8 100.00 M

Country Destinations Of Direct  
Equity Investment From Post  
TerritoryEstm. Value  
\$ CDN% Of Annual Direct Equity  
Investment Outflows By  
Category Of Investors

1. 075 CANADA	\$ 8 100.00 M	1. Corporations : 40.00 %
2. 609 EUROPEAN COMMON MARKET C	\$ 8 000.00 M	2. Institutional : 55.00 %
3. 265 JAPAN	\$ 1 000.00 M	3. Entrepreneurs : 5.00 %
4. 047 BRAZIL	\$ 1 000.00 M	4. Immigrant Entr.: 0.00 %

The Mission Has Reported Factors That Tend To Change  
Outward Flows Of Investment From The Post Territory Including:

- Corporate Search For Cheaper Production And/Or Operating Costs Outside The Country
- Corporate Expansion To Seek New Markets
- Corporate Expansion To Serve Better Existing Markets
- Territory Is Host To Active International Capital Market Which Is Focussed On International Capital Movements (e.g. N.Y., London, Tokyo)

The Mission Reports That Investors From The Post Territory Who Invest Abroad  
In Manufacturing Tend To Invest In The Following Sector(s) Subsector(s)

## -SECTOR(S)-

1. 016 INDUSTRIAL MACHIN. PLANTS, SERV.
2. 011 OIL & GAS EQUIPMENT, SERVICES
3. 001 AGRI & FOOD PRODUCTS & SERVICE
4. 006 ELECTRONICS EQUIP. & SERV

## -SUBSECTOR(S)-

- 161 MANUFACT & MATERIAL PLANT, EQP.
- 116 MACHINERY AND EQUIPMENT
- 999 ALL SUB-SECTORS
- 061 PRODUCTS & COMPONENTS

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 602 CHICAGO

Country: 577 UNITED STATES OF AMERICA

**Equity Propensity Of Key Sources Of Investment From This Territory**

Corporations : 100% Ownership Of Existing Corporate Facility  
Institutional : Partial Ownership Of Existing Corporate Facilities With Direct  
Involvement In Day-to-Day Operations  
Entrepreneurs : Start-up Investment To Create New Enterprise (100% Ownership)  
Immigrant Entr.: Start-up Investment To Create New Enterprise (100% Ownership)

**Sector Preferences By Type Of Key Investors**

Corporations : Manufacturing Industries  
Institutional : Portfolio Investment  
Entrepreneurs : Manufacturing Industries  
Immigrant Entr.: Manufacturing Industries

**Investment Promotion Priority Sectors Sub-Sectors  
Program Plans And Anticipated Results.**

Sector : 016 INDUSTRIAL MACHIN, PLANTS, SERV.  
Subsector: 161 MANUFACT & MATERIAL PLANT, EQP.

Reason(s):  
EXCELLENT INVESTMENT POTENTIAL FROM TARGET GROUP OF MANUFACTURING  
COMPANIES WITH ANNUAL SALES OF \$5-200 MILLION.

Program Plans:  
PARTICIPATE IN INDUSTRIAL TRADE SHOWS AND/OR SEMINARS IDENTIFIED WITH  
AN INVESTMENT PROMOTION BOOTH STAFFED BY CANADIAN ECONOMIC DEVELOPMENT  
SPECIALISTS.

Anticipated Results: EACH TRADE SHOW WILL GENERATE 50-70 INVE-  
STMENT LEADS AND EACH SEMINAR WILL GENERATE  
30-40 LEADS.

Sector : 016 INDUSTRIAL MACHIN, PLANTS, SERV.  
Subsector: 163 TOOLS & HARDWARE

Reason(s):  
MCCORMICK PLACE, CHICAGO, HOSTS TRADE SHOWS FOR THIS SECTOR/SUBSECTOR  
WHICH ARE INTERNATIONAL IN SCOPE.

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Region: USA

Mission: 602 CHICAGO

Country: 577 UNITED STATES OF AMERICA

Investment Promotion Priority Sectors Sub-Sectors  
Program Plans And Actipicipated Results.

Sector : 001 AGRI & FOOD PRODUCTS & SERVICE  
Subsector: 017 FOOD HANDLING, PROCESSING EQUIP

Reason(s):

INPUT FROM PROVINCIAL GOVERNMENTS INDICATE THAT THESE ARE PRIORITIES  
IN CANADA AND REQUIRED TECHNOLOGY IS AVAILABLE FROM COMPANIES LOCATED  
IN MIDWEST.

Sector : 006 ELECTRONICS EQUIP. & SERV  
Subsector: 061 PRODUCTS & COMPONENTS

Reason(s):

TECHNOLOGY CENTRES (ROCKFORD, CHICAGO, ST. LOUIS) ARE ASSISTING COMPANIES  
WITH INVESTMENT POTENTIAL OF INTEREST TO CANADA AND ARE SUPPORTIVE OF  
TECHNOLOGY TRANSFER CONCEPT.

Sector : 014 EDUCATION, MEDICAL, HEALTH PROD  
Subsector: 141 PHARMACEUTICALS, BIOTECHNOLOGY

Reason(s):

MONSANTO CO. AND EMERSON ELECTRIC CO. HAVE FORMED INNOVEN CAPITAL, A  
VENTURE CAPITAL FUND THAT INVESTS IN HIGH TECHNOLOGY. INNOVEN CAPITAL  
HELPED FINANCE SUCH BIOTECH PIONEERS AS GENENTECH, GIDGEN, N. V., CALLAGEN

Sector : 005 COMM. & INFORM. EQP. & SERV  
Subsector: 057 ROBOTICS & ARTIFICIAL INTELL.

Reason(s):

ROBOTICS, MACHINE TOOL AND ADVANCED MANUFACTURING SYSTEMS TECHNOLOGY  
IS CENTRALIZED IN MIDWEST REGION.

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Region: USA

Mission: 602 CHICAGO

Country: 577 UNITED STATES OF AMERICA

**Other Investment Program Plans**

Activity(ies):  
MINISTERIAL SPEAKING ENGAGEMENTS IN CHICAGO, ST. LOUIS, MILWAUKEE AND  
KANSAS CITY.

Anticipated Results: 10 INVESTMENT LEADS PER CITY.

Activity(ies):  
PRIVATE SEMINAR/MEETING TO REACH SELECT JAPANESE BUSINESSMEN IN  
CHICAGO AREA. COSPONSORS BLAKE CASSELLS, JAPAN-CHICAGO CHAMBER OF  
COMMERCE, SEKE & JARVIS.

Anticipated Results: 10 INVESTMENT LEADS

Activity(ies):  
MIDWEST PORTFOLIO MANAGERS MISSION

Anticipated Results: INCREASED INDIRECT INVESTMENT (\$10 MILLION

DATE: 88/01/25

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 602 CHICAGO

Country: 577 UNITED STATES OF AMERICA

Investment Promotion Activities Proposals

Type Of Event: 010 MINISTERIAL MISSION

Description: MINISTERIAL SPEAKING ENGAGEMENT  
Priority: 1 Date: 00/00  
Sector: 999 MULTIPLE SECTORS  
Sub-Sector: 999 ALL SUB-SECTORS  
Location: CHIC, ST. LOUIS, MILW.

Description: MINISTERIAL SPEAKING ENGAGEMENT  
Priority: 1 Date: 00/00  
Sector: 999 MULTIPLE SECTORS  
Sub-Sector: 999 ALL SUB-SECTORS  
Location: CHIC, ST. LOUIS, MILW.

Type Of Event: 040 DIRECT MAIL CAMPAIGN

Description: DIRECT MAILING DRIE, INVESTMENT CDA LITERATURE  
Priority: 5 Date: 08/88  
Sector: 014 EDUCATION, MEDICAL, HEALTH PROD  
Sub-Sector: 141 PHARMACEUTICALS, BIOTECHNOLOGY  
Location: ILLIN, WISC, MISSOURI

Description: DIRECT MAILING DRIE, INVESTMENT CDA LITERATURE  
Priority: 5 Date: 08/88  
Sector: 014 EDUCATION, MEDICAL, HEALTH PROD  
Sub-Sector: 141 PHARMACEUTICALS, BIOTECHNOLOGY  
Location: ILLIN, MISS., WISC.

Type Of Event: 050 SEMINARS

Description: INVESTMENT SEMINAR  
Priority: 3 Date: 10/88  
Sector: 014 EDUCATION, MEDICAL, HEALTH PROD  
Sub-Sector: 141 PHARMACEUTICALS, BIOTECHNOLOGY  
Location: ST. LOUIS

DATE: 88/01/25

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 602 CHICAGO

Country: 577 UNITED STATES OF AMERICA

Investment Promotion Activities Proposals

Type Of Event: 050 SEMINARS

Description: 5 TARGETTED SEMINARS INCL CDN BUDGET, JAP INVESTORS

Priority: 4 Date: 00/00

Sector: 999 MULTIPLE SECTORS

Sub-Sector: 999 ALL SUB-SECTORS

Location: CHICAGO & MIDWEST

Description: 5 SECTOR SPECIFIC & TECHN TRANSFER SEMINARS

Priority: 3 Date: 00/00

Sector: 999 MULTIPLE SECTORS

Sub-Sector: 999 ALL SUB-SECTORS

Location: CHIC, ST. LOUIS, KANS,

Description: BRIEFING ON CDN BUDGET (IMPLIF FOR CHIC COS WITH CD

Priority: 4 Date: 00/00

Sector: 999 MULTIPLE SECTORS

Sub-Sector: 999 ALL SUB-SECTORS

Location: CHICAGO

Description: INVETMENT SEMINAR TARGETTED AT CLIENTS OF COOPERS

Priority: 4 Date: 00/88

Sector: 999 MULTIPLE SECTORS

Sub-Sector: 999 ALL SUB-SECTORS

Location: CHICAGO

Description: JAPANESE CORPORATIONS BASED IN CHICAGO

Priority: 4 Date: 06/88

Sector: 999 MULTIPLE SECTORS

Sub-Sector: 999 ALL SUB-SECTORS

Location: CHICAGO

Description: INVESTMENT SEMINAR

Priority: 3 Date: 04/88

Sector: 999 MULTIPLE SECTORS

Sub-Sector: 999 ALL SUB-SECTORS

Location: QUAD CITIES

DATE: 88/01/25

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 602 CHICAGO

Country: 577 UNITED STATES OF AMERICA

Investment Promotion Activities Proposals

Type Of Event: 050 SEMINARS

Description: TECHNOLOGY TRANSFER SEMINARS (3)  
Priority: 3 Date: 09/88  
Sector: 999 MULTIPLE SECTORS  
Sub-Sector: 999 ALL SUB-SECTORS  
Location: KANSAS, MILW., CHICAGO

Type Of Event: 070 OTHER PROMOTIONAL EVENTS

Description: DRIE SECTOR PROFILES  
Priority: 7 Date: 01/89  
Sector: 999 MULTIPLE SECTORS  
Sub-Sector: 999 ALL SUB-SECTORS  
Location: MIDWEST

Description: REINVESTMENT ACTIVITY (MAINT & EXPANSION OF CORP  
Priority: 1 Date: 00/88  
Sector: 999 MULTIPLE SECTORS  
Sub-Sector: 999 ALL SUB-SECTORS  
Location: ILLIN., MISS., WISC.

Description: REINVESTMENT ACTIVITY (MAINT & EXPANSION OF CORP  
Priority: 1 Date: 00/88  
Sector: 999 MULTIPLE SECTORS  
Sub-Sector: 999 ALL SUB-SECTORS  
Location: ILLIN., MISS., WISC.

Description: DRIE SECTOR PROFILES  
Priority: 7 Date: 01/89  
Sector: 999 MULTIPLE SECTORS  
Sub-Sector: 999 ALL SUB-SECTORS  
Location: MIDWEST

DATE: 88/01/25

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 602 CHICAGO

Country: 577 UNITED STATES OF AMERICA

Investment Promotion Activities Proposals

Type Of Event: 070 OTHER PROMOTIONAL EVENTS

Description: INT'L AIR CONDITIONING HEATING & REFRIG EXPO

Priority: 2 Date: 01/89

Sector: 016 INDUSTRIAL MACHIN, PLANTS, SERV.

Sub-Sector: 161 MANUFACT & MATERIAL PLANT, EQP.

Location: CHICAGO

Description: PACKAGING MACHINERY MANUF INST EXH

Priority: 2 Date: 11/88

Sector: 016 INDUSTRIAL MACHIN, PLANTS, SERV.

Sub-Sector: 161 MANUFACT & MATERIAL PLANT, EQP.

Location: CHICAGO

Description: PLANT ENGINEERING & MAINTENANCE SHOW

Priority: 2 Date: 03/89

Sector: 016 INDUSTRIAL MACHIN, PLANTS, SERV.

Sub-Sector: 999 ALL SUB-SECTORS

Location: CHICAGO

Description: ADVANCED MANUFACTURING SYSTEMS EXH.

Priority: 2 Date: 07/88

Sector: 016 INDUSTRIAL MACHIN, PLANTS, SERV.

Sub-Sector: 999 ALL SUB-SECTORS

Location: CHICAGO

Description: 8 INDUSTRIAL TRADE SHOWS

Priority: 2 Date: 00/00

Sector: 016 INDUSTRIAL MACHIN, PLANTS, SERV.

Sub-Sector: 999 ALL SUB-SECTORS

Location: CHICAGO

Description: NAT'L MACHINE TOOL BUILDERS/INT'L MACH TOOL SHOW

Priority: 2 Date: 09/88

Sector: 016 INDUSTRIAL MACHIN, PLANTS, SERV.

Sub-Sector: 163 TOOLS & HARDWARE

Location: CHICAGO



DATE: 88/01/25

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 602 CHICAGO

Country: 577 UNITED STATES OF AMERICA

Investment Promotion Activities Proposals

Type Of Event: 070 OTHER PROMOTIONAL EVENTS

Description: AUTOFACT

Priority: 2

Date: 10/88

Sector: 016 INDUSTRIAL MACHIN, PLANTS, SERV.

Sub-Sector: 163 TOOLS & HARDWARE

Location: CHICAGO

Description: HAZMAT - HAZARDOUS MATERIALS

Priority: 2

Date: 03/89

Sector: 016 INDUSTRIAL MACHIN, PLANTS, SERV.

Sub-Sector: 161 MANUFACT & MATERIAL PLANT, EQP.

Location: CHICAGO

Description: INT'L AUTOMOTIVE AFTERMARKET SHOW BIG "I"

Priority: 2

Date: 02/89

Sector: 016 INDUSTRIAL MACHIN, PLANTS, SERV.

Sub-Sector: 161 MANUFACT & MATERIAL PLANT, EQP.

Location: CHICAGO

Type Of Event: 071 INCOMING MISSION

Description: MIDWEST PORTFOLIO MANAGERS

Priority: 6

Date: 09/88

Sector: 999 MULTIPLE SECTORS

Sub-Sector: 999 ALL SUB-SECTORS

Location: MIDWEST

Description: MIDWEST PORTFOLIO MANAGERS MISSION TO OTTAWA

Priority: 6

Date: 09/88

Sector: 999 MULTIPLE SECTORS

Sub-Sector: 999 ALL SUB-SECTORS

Location: MIDWEST

DATE: 88/01/25

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 602 CHICAGO

Country: 577 UNITED STATES OF AMERICA

Investment Promotion Activities Proposals

Type Of Event: 090 ENTREPRENEURIAL IMMIGRATION

Description: RECREATION/SPORTS TRADE SHOWS(2) TO ATTRACT ENTREP

Priority: 4

Date: 01/89

Sector: 017 SERVICE INDUSTRIES

Sub-Sector: 181 TOURISM

Location: MIDWEST

## Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 602 CHICAGO		
Sector: 010 MINE, METAL, MINERAL PROD & SRV		
010 FAIRS AMERICAN SOCIETY METAL INDUSTRY	CHICAGO	0989
Sector: 012 PETROCHEM & CHEM PROD, EQP, SERV		
010 FAIRS HAZMAT CENTRAL	CHICAGO	0390
NATIONAL PLASTICS EXPO	CHICAGO	0689
Sector: 013 CONSUMER PRODUCTS		
010 FAIRS HOME CENTER SHOW	CHICAGO	0390
HOUSEWARE SHOW	CHICAGO	0190
SPORTING GOODS SHOW	CHICAGO	1089
HARDWARE SHOW	CHICAGO	0889
024 MISSION INCOMING MONTREAL FURNITURE SHOW	MONTREAL	0689
IIDEX/TORONTO	TORONTO	1189
TORONTO FURNITURE SHOW	TORONTO	0190
FESTIVAL OF FASHION	TORONTO	0390
Sector: 015 CONSTRUCTION INDUSTRY		
010 FAIRS CONSTRUCTION WORLD	CHICAGO	1289
Sector: 016 INDUSTRIAL MACHIN, PLANTS, SERV.		
010 FAIRS ADVANCED MANUFACTURING SYSTEMS	CHICAGO	0789
CONTROL ENGINEERING	CHICAGO	0589
PLANT ENGINEERING & MAINTENANCE SHOW	CHICAGO	0390
DESIGN ENGINEERING SHOW	CHICAGO	0390
ASSEMBLY TECHNOLOGY EXPO	CHICAGO	0989

## Export and Investment Promotion Planning System

88/89 Trade and Economic Overview

Mission: 603 CLEVELAND

Country: 577 UNITED STATES OF AMERICA

IN 86 THE CLEVELAND CONSULATE'S TERRITORY PRODUCED ABOUT \$18.35B CDN IN BILATERAL TRADE. CDN EXPORTERS TO THE TERRITORY WERE \$8.37B CDN. US EXPORTS WERE \$9.98B CDN. CDN EXPORTS TO THE REGION HAVE INCREASED JUST OVER 1% THROUGH THE FIRST HALF OF 87. US EXPORTS FOR THE HALF SHOW A 1% DECLINE. THE REGION TRADITIONALLY HAS HAD A TRADE SURPLUS WITH CDA. HOWEVER RECENT TRENDS SHOW THAT THE SURPLUS IS NARROWING RAPIDLY. IN OHIO WITH THE MOST BILATERAL TRADE ITS BILLION \$ TRADE SURPLUS HAS BEEN CUT 34% TO \$1.32 BIL. IN PENNSYLVANIA WHERE THERE WAS ALMOST AN EXACT TRADE BALANCE IN 86 THE SHIFT IS NOW IN CANADA'S FAVOR. CANADIAN EXPORTS TO WEST VIRGINIA HAVE INCREASED SLIGHTLY IN 87 AS DID EXPORTS TO KENTUCKY. AUTOMOTIVE CONTINUES AS THE LARGEST SINGLE INDUSTRY CONTRIBUTING ABOUT 30% OF CDN EXPORTS. NEWSPRINT & WOOD PRODUCTS ARE ALSO LARGE EXPORT GROUPS AS ARE METALS ORES & CHEMICALS. OTHER LARGE AND FASTER GROWING EXPORTS ARE: OFFICE MACHINES ELECTRICAL EQUIPMENT AIRCRAFT PARTS INDUSTRIAL MACHINERY & LEISURE PRODUCTS. "IN THE DEFENCE TRADE SECTOR ALTHOUGH CANADIAN EXPORTS TO POST TERRITORY WERE \$51M IN CY 86 THIS IS A SMALL FRACTION OF THE MULTI-BILLION DEFENCE MARKET. FOLLOW-ON ACTIVITIES FROM NTS FUNDED EVENTS IN FY 87/88 SHOULD INCREASE BOTH DEFENCE R&D COOPERATIVE PROJECTS & OVERALL PRODUCT EXPORTS. WESTERN PENNSYLVANIA & WEST VIRGINIA ARE REGIONS ENJOYING BOTH ECONOMIC DIVERSIFICATION & DECLINE IN SOME AREAS. PITTSBURG & VICINITY IS THE 3RD LARGEST CENTER OF FORTUNE 500 CORPORATE HEADQUARTERS IN AMERICA. THE CITY OF ALMOST 3M HAS SUCCESSFUL DIVERSIFIED FROM AN OVERRELIANCE ON THE STEEL INDUSTRY TO HIGH TECHNOLOGY INDUSTRIES & SERVICES & IS AN IMPORTANT CENTER FOR MEDICINE NUCLEAR TECHNOLOGY & SCIENTIFIC RESEARCH. THE PITTSBURG OFFICE IS NEW & INTENDS TO CONCENTRATE ON DEVELOPING THE MARKET IN WESTERN PENNSYLVANIA & WEST VIRGINIA THROUGH INITIATIVES THAT ARE AS A RESULT OF PRELIMINARY INVESTIGATION AND CONTACT-BUILDING WHICH HAVE TAKEN PLACE OVER THE PAST YEAR.

## Export and Investment Promotion Planning System

REPT: SYN-GEO 88/89 : A. Post export program priorities

Region: UNITED STATES

Mission: 603 CLEVELAND

Market: 577 UNITED STATES OF AMERICA

The Mission selected the following sectors as priority areas for export promotion activities for the coming fiscal year:

## 1. 008 TRANSPORT SYS, EQUIP, COMP, SERV.

REASONS: THE TERRITORY CONTINUES TO BE A CENTER FOR AUTO & AUTO PARTS PRODUCTION IE APPROX. 40% OF THE TOTAL NATIONAL PRODUCTION. THIS WILL INCREASE AS THE NEW JAPANESE PLANTS COME ON STREAM.

## 2. 016 INDUSTRIAL MACHIN, PLANTS, SERV.

REASONS: MUCH OF THE INDUSTRIAL BASE OF THE TERRITORY RESTS ON THE METAL FABRICATION SECTOR; CASTING FORGING TURNING STAMPING ETC. THE TERRITORY ACCOUNTS FOR % OF THE METAL WORKING INDUSTRY IN THE USA.

## 3. 004 DEFENCE PROGRAMS, PRODUCTS, SERV

REASONS: OHIO & WESTERN PENNSYLVANIA ARE MAJOR DEFENCE MARKET AREAS IN THE USA. WITH OVER 200 US DEFENCE CONTRACTORS & TWO DEFENCE LOGISTIC AGENCY SUPPLY CENTERS NASA/LEWIS AIR FORCE WRIGHT AERONAUTICAL LABS & THE

## 4. 005 COMM. &amp; INFORM. EQP. &amp; SERV

REASONS: AS A RESULT OF THE ECONOMIC RESTRUCTURING WHICH HAS OCCURRED IN THE TERRITORY THE MANUFACTURING SECTOR IN ORDER TO REMAIN COMPETITIVE IS ENGAGED IN A BROAD MODERNIZATION PROGRAM & THAT PORTION OF THE SECTOR

The most important current Canadian export sectors to this market are (based on actual export sales):

1. 008 TRANSPORT SYS, EQUIP, COMP, SERV.

2. 009 FOREST PRODUCTS, EQUIP, SERVICES

3. 010 MINE, METAL, MINERAL PROD &amp; SRV

4. 004 DEFENCE PROGRAMS, PRODUCTS, SERV

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 603 CLEVELAND

Market: 577 UNITED STATES OF AMERICA

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	550.00M	\$ 500.00M	\$ 0.00M	\$ 0.00M
Canadian Exports \$	55.00M	\$ 50.00M	\$ 51.00M	\$ 50.00M
Canadian Share of Import Market	10.00%	10.00%	0.00%	0.00%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	000 %
ii) 051 UNITED KINGDOM	000 %
iii) 128 GERMANY WEST	000 %
iv) 237 ITALY	000 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Small but expanding

Products/services for which there are  
good market prospectsCurrent Total Imports  
In Canadian \$

i) AEROSPACE R&D	\$ 0.00 M
ii) AEROSPACE PRODUCTS	\$ 0.00 M
iii) AVIONICS PRODUCTS	\$ 0.00 M
iv) ELECTRONICS PRODUCTS	\$ 0.00 M
v) MACHINING SERVICES	\$ 0.00 M
vi) VEHICLE PARTS	\$ 0.00 M
vii) MARINE PRODUCTS	\$ 0.00 M

Projects or portion of projects which are still in the planning  
stage and for which Canadian companies might have reasonable prospects.

i) Project Name: USAF R&D & ACQUISITION RELATED TO GOALS  
OF SUPERCOCKPIT, PROJ FORECAST II, & PROD.

Approximate Value: \$ 100 M

Financing Source: 012 DOM 025 OTHER

For further info. please contact:

A. F. CAMPBELL (DAYTON POST) DEF PROG BUREAU (OTTAWA)

## Export and Investment Promotion Planning System

MISSION: 603 CLEVELAND

COUNTRY: 577 UNITED STATES OF AMERICA

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- exports of certain products or services to this country are subject to Canadian export controls
- approval of technical standards can present problems in the case of some imported products

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- the unsuitability of Canadian products for this market
- the apparent limited sectoral capability in Canada compared to other competing export countries
- non-tariff protectionist measures which are difficult to overcome
- other factor(s) described by the Trade Office as follows:  
LACK OF UNDERSTANDING OF HOW TO ACCESS THIS MARKET & UNWILLINGNESS TO APPOINT AGENTS OR REPRESENTATIVES. VISIT CLEARANCE PROCEDURES INHIBIT EXPORTERS WILLINGNESS TO EXPLORE MARKET OPPORTUNITIES.

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- the existence of a bilateral economic/trade arrangement between Canada and this country

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

- the adequacy of exporter information in Canadian Directories
- product/service information from Canadian companies

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: USAF/AFWAL PERSONNEL VISITED SELECTED CANADIAN COMPANIES TO REVIEW THEIR R&D WORK. RESULTS OF THIS DIALOGUE WILL TAKE TIME TO EVALUATE.

Results Expected: MORE COOPERATIVE R&D CONTRACTS FOR CANADIAN COMPANIES FOLLOWED BY RESULTANT PRODUCT SALES TO US PRIME CONTRACTORS.

## Export and Investment Promotion Planning System

MISSION: 603 CLEVELAND

COUNTRY: 577 UNITED STATES OF AMERICA

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: INCREASED IMPORTANCE OF CANADA/USAF(ASD/AFWAL) COOPERATIVE R&D WORKING GROUP IN CONJUNCTION WITH CONTINUING R&D REVIEW TEAM VISITS.

Results Expected: MORE R&D COOPERATIVE PROJECTS, IMPROVED DIALOGUE BETWEEN CANADIAN FIRMS AND ASD/AFWAL, EVENTUALLY INCREASED EXPORTS.

Activity: MARKET IDENTIFICATION OF SMALL AND MEDIUM SIZE COMPANIES ON CONTRACTS WITH DEPT. OF DEFENSE OR MAJOR DEFENSE CONTRACTORS.

Results Expected: WILL ALLOW DEFENSE SPECIALISTS OPPORTUNITY TO IDENTIFY CANADIAN EXPERTISE MOST LIKELY TO COMPLEMENT LOCAL RESOURCES.



## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 603 CLEVELAND

Market: 577 UNITED STATES OF AMERICA

Sector: 005 COMM. &amp; INFORM. EQP. &amp; SERV

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1600.00M	\$ 1500.00M	\$ 1400.00M	\$ 1200.00M
Canadian Exports \$	96.00M	\$ 93.00M	\$ 91.00M	\$ 90.00M
Canadian Share of Import Market	6.00%	6.25%	6.50%	7.00%

## Major Competing Countries

## Market Share

i) 265 JAPAN	030 %
ii) 192 PEOPLE'S REP OF CHINA	018 %
iii) 268 KOREA	006 %
iv) 051 UNITED KINGDOM	000 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 5-15 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) MANUFACTURING SOFTWARE	\$ 0.00 M
ii) BUSINESS SOFTWARE	\$ 0.00 M
iii) SPECIALIZED PHERIPHERALS	\$ 0.00 M
iv) ELECTRIC COMPONENTS	\$ 0.00 M
v) ROBOTICS	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- the apparent limited sectoral capability in Canada compared to other competing export countries

## Export and Investment Promotion Planning System

MISSION: 603 CLEVELAND

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: WESTINGHOUSE VENDOR DAY IN MONTREAL - PITTSBURG.

Results Expected: SOURCING OF PCB REQUIREMENTS AND POWER SUPPLY

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: MARKET IDENTIFICATION OF BUSINESS/INDUSTRIAL SOFTWARE USERS

Results Expected: BASE SOLO SHOW IN 89/90 ON FINDINGS.

Activity: MARKETING STUDY ON THE BUYING PATTERNS OF SELECTED LOCAL COMPANIES FOR WORKPLACE AUTOMATION PRODUCTS

Results Expected: WILL ALLOW POST TO RECOMMEND APPROPRIATE ACTION AND PROMOTIONS TO CANADIAN COMPANIES WISHING TO EXPAND IN TERRITORY.

Activity: REVIEW OF REQUIREMENTS OF MAJOR BUYERS IN AREA. (CINCINNATI BELL, AT & T, CABLE OPERATORS)

Results Expected: INCREASE THE NUMBER OF CANADIANS BIDDING ON PROJECTS.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 603 CLEVELAND

Market: 577 UNITED STATES OF AMERICA

Sector: 008 TRANSPORT SYS. EQUIP. COMP. SERV.

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import)	\$ 10100.00M	\$ 9500.00M	\$ 8700.00M	\$10800.00M
Canadian Exports	\$ 1000.00M	\$ 1500.00M	\$ 1400.00M	\$ 1442.00M
Canadian Share of Import Market	16.00%	16.00%	16.00%	13.00%

## Major Competing Countries

Market Share

i) 265 JAPAN	010 %
ii) 128 GERMANY WEST	005 %
iii) 192 PEOPLE'S REP OF CHINA	000 %
iv) 268 KOREA	003 %
v) 112 FRANCE	000 %
vi) 051 UNITED KINGDOM	002 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) AFTERMARKET AUTO PARTS	\$ 1200.00 M
ii) OEM PARTS SUPPLYING JAPANESE ASSEMBLY PLANTS	\$ 0.00 M
iii) SUBWAY CARS	\$ 0.00 M
iv) TRANSPORTATION SERVICES	\$ 0.50 M
v) REBUILT SUBWAY CARS	\$ 0.00 M
vi) FIBER GLASS SAIL AND POWER BOATS	\$ 2.00 M
vii) MARINE ACCESSORIES - ELECTRONICS	\$ 1.00 M

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

- i) Project Name: PAT SUBWAY CAR REBUILD  
 Approximate Value: \$ 20 M  
 Financing Source: 025 OTHER  
 For further info. please contact:  
 PITTSBURGH TRADE OFFICE (412)392-2308

## Export and Investment Promotion Planning System

MISSION: 603 CLEVELAND

COUNTRY: 577 UNITED STATES OF AMERICA

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

- ii) Project Name: PAT E/W SUBWAY EXTENSION  
 Approximate Value: \$ 1000 M  
 Financing Source: 025 OTHER  
 For further info. please contact:

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- non competitive pricing
- non-tariff protectionist measures which are difficult to overcome
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters
- other factor(s) described by the Trade Office as follows:  
 HIGH DEGREE OF COMPETITION FROM U. S. SUPPLIERS AND THIRD COUNTRY SUPPLIERS.

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada
- the existence of a bilateral economic/trade arrangement between Canada and this country
- the availability of competitive Canadian financing

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

- product/service information from Canadian companies

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: REVIEW OF G.E. ENGINE PLANT REQUIREMENTS AND BUYING STRUCTURE.

Results Expected: INCREASE NUMBER OF CANADIAN COMPANIES BIDDING ON G. E. REQUIREMENTS.

Export and Investment Promotion Planning System

MISSION: 603 CLEVELAND

COUNTRY: 577 UNITED STATES OF AMERICA

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: MAINTAIN CONNECTION WITH PAT REGARDING SYSTEMS LONG-TERM PLAN (YEAR 2000) TO COMPLETE E-W SUBWAY EXTENSION.

Results Expected: (LONG-TERM) ENABLE CANADIAN COMPANIES TO BID ON TRAIN AND DESIGN REQUIREMENTS.

Activity: WORK WITH UTW & DRIE TO COMPLETE STUDY OF JAPANESE SOURCING (HONDA & TOYOTA ASSEMBLY PLANTS).

Results Expected: DISCOVER EXPORT OPPORTUNITIES FOR CDN OEM SUPPLIERS.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 603 CLEVELAND

Market: 577 UNITED STATES OF AMERICA

Sector: 016 INDUSTRIAL MACHIN, PLANTS, SERV.

Subsector: 161 MANUFACT &amp; MATERIAL PLANT, EQP.

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	895.00M	\$ 830.00M	\$ 800.00M	\$ 0.00M
Canadian Exports \$	136.00M	\$ 125.00M	\$ 105.00M	\$ 0.00M
Canadian Share of Import Market	15.00%	15.00%	13.00%	0.00%

## Major Competing Countries

## Market Share

i) 265 JAPAN	020 %
ii) 128 GERMANY WEST	005 %
iii) 237 ITALY	004 %
iv) 051 UNITED KINGDOM	004 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 5-15 \$M

Current status of Canadian exports: Well established and growing

Products/services for which there are  
good market prospects

## Current Total Imports

	In Canadian \$
i) GENERAL INDUSTRIAL MACHINERY	\$ 35.00 M
ii) METALWORKING MACHINERY	\$ 22.00 M
iii) MATERIALS HANDLING EQUIPMENT	\$ 13.00 M
iv) METAL PROCESSING EQUIPMENT & COMPONENTS	\$ 11.00 M
v) MACHINE PARTS	\$ 10.00 M

The Trade Office reports that the following factors influence Canadian  
export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector  
(sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters

## Export and Investment Promotion Planning System

MISSION: 603 CLEVELAND

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: DEVELOP MARKET INFORMATION ON STEEL SECTOR CAPITAL EQUIPMENT REQUIREMENTS.

Results Expected: SELECTION OF COMPANIES OF AISE SHOW

Activity: MARKETING STUDY ON THE BUYING PATTERNS OF SELECTED LOCAL COMPANIES FOR INDUSTRIAL MACHINERY.

Results Expected: WILL ALLOW POST TO RECOMMEND APPROPRIATE ACTIONS & PROMOTION TO CANADIAN COMPANIES WISHING TO EXPAND INTO TERRITORY

Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 603 CLEVELAND

Country: 577 UNITED STATES OF AMERICA

## Highlights of Investment Environment

Estimated Value Of Equity Investment  
In Canada From This Post Territory:

\$ 4 000.00 M

Estimated Value Of Annual Direct Equity  
Investments To All Destinations From  
This Post Territory:

\$ 1 000.00 M

Country Destinations Of Direct  
Equity Investment From Post  
TerritoryEstm. Value  
\$ CDN% Of Annual Direct Equity  
Investment Outflows By  
Category Of Investors

1. 075 CANADA	\$ 1 000.00 M	1. Corporations : 45.00 %
2. 051 UNITED KINGDOM	\$ 700.00 M	2. Institutional : 50.00 %
3.	\$ . M	3. Entrepreneurs : 5.00 %
4.	\$ . M	4. Immigrant Entr.: 0.00 %

The Mission Has Reported Factors That Tend To Change  
Outward Flows Of Investment From The Post Territory Including:

- Corporate Expansion To Seek New Markets
- Corporate Expansion To Serve Better Existing Markets

The Mission Reports That Investors From The Post Territory Who Invest Abroad  
In Manufacturing Tend To Invest In The Following Sector(s) Subsector(s)

## -SECTOR(S)-

- 008 TRANSPORT SYS, EQUIP, COMP, SERV.
- 016 INDUSTRIAL MACHIN, PLANTS, SERV.
- 012 PETROCHEM & CHEM PROD, EQP, SERV
- 006 ELECTRONICS EQUIP. & SERV

## -SUBSECTOR(S)-

- 081 AUTDMOTIVE
- 161 MANUFACT & MATERIAL PLANT, EQP.
- 121 CHEM & PETROCHEM PRODUCTS
- 061 PRODUCTS & COMPONENTS

## Equity Propensity Of Key Sources Of Investment From This Territory

Corporations : Start-up Investment To Create New Enterprise (100% Ownership)  
 Institutional :  
 Entrepreneurs : Partial Ownership Of Existing Corporate Facilities With Direct  
 Involvement In Day-to-Day Operations  
 Immigrant Entr. :



Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 603 CLEVELAND

Country: 577 UNITED STATES OF AMERICA

Sector Preferences By Type Of Key Investors

Corporations : Manufacturing Industries  
Institutional : Portfolio Investment  
Entrepreneurs : Services  
Immigrant Entr. :

Investment Promotion Priority Sectors Sub-Sectors  
Program Plans And Anticipated Results.

Sector : 005 COMM. & INFORM. EGP. & SERV  
Subsector: 057 ROBOTICS & ARTIFICIAL INTELL.

Reason(s):  
PITTSBURG/DAYTON ARE RAPIDLY BECOMING CENTERS OF EXCELLENCE FOR  
ROBOTICS & ARTIFICIAL INTELLIGENCE.

Program Plans:  
CORPORATE LIAISON CALLS ARE 1 OF THE MOST USEFUL METHODS OF LEARNING  
ABOUT CORPORATE PROPOSED MEDIUM & LONG TERM PLANS FOR EXPANSION OF  
OPERATIONS.

Anticipated Results: MAKE DIRECT VISITS TO 25 MAJOR INDUSTRIES  
IN TERRITORY.

Sector : 005 COMM. & INFORM. EGP. & SERV  
Subsector: 054 COMPUTERS, SOFTWARE & SYSTEMS

Reason(s):  
PITTSBURG HAS ACCRUED MAJOR GOV'T R&D FUNDS FOR DEVELOPMENT OF SOFT-  
WARE INSTITUTE WHICH WILL MEAN AN EXPANSION OF THE ENTIRE INFORMATICS  
SECTOR IN THAT AREA.

Program Plans:  
USE PRESENCE AT TRADE SHOWS AS METHOD OF IDENTIFYING POTENTIAL PROS-  
PECTS.

DATE: 88/01/25

DEPARTMENT OF EXTERNAL AFFAIRS

PAGE: 100b

Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 603 CLEVELAND

Country: 577 UNITED STATES OF AMERICA

Investment Promotion Priority Sectors Sub-Sectors  
Program Plans And Anticipated Results.

Sector : 005 COMM. & INFORM. EQP. & SERV  
Subsector: 054 COMPUTERS, SOFTWARE & SYSTEMS

Anticipated Results: KEEP IDEA OF FUTURE EXPANSION PROSPECTS IN  
MINDS OF INTERVIEW COMPANIES.

Sector : 008 TRANSPORT SYS, EQUIP, COMP, SERV.  
Subsector: 081 AUTOMOTIVE

Reason(s):

THERE ARE MANY AUTOMOTIVE COMPONENT MANUFACTURERS WHO ARE INTERESTED  
IN THE INCREASED ACTIVITY IN THE AUTOMOTIVE SECTOR OF CANADA.

Program Plans:

INCLUDE IN PRESENTATION TO BUSINESS COMMUNITY A DISCUSSION ON CDA'S  
INVESTMENT CLIMATE AND PROGRAM.

Anticipated Results: INFORM BUSINESS COMMUNITY OF CDA'S IN-  
TEREST IN INCREASED FOREIGN INVESTMENT.

Sector : 006 ELECTRONICS EQUIP. & SERV  
Subsector: 999 ALL SUB-SECTORS

Reason(s):

POSTS' PARTICIPATION IN USA WIDE ELECTRONICS INVESTMENT PROMOTION.

Program Plans:

FOLLOWUP THE SERIES OF INVESTMENT SEMINARS WHICH WERE HELD IN FY 86/87  
AND 87/88 WITH INDIVIDUAL CALLS TO ATTENDEES.

Anticipated Results: DEVELOP A SHORT LIST OF POTENTIAL  
INVESTORS.

DATE: 88/01/25

DEPARTMENT OF EXTERNAL AFFAIRS

PAGE: 100e

Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 603 CLEVELAND

Country: 577 UNITED STATES OF AMERICA

Investment Promotion Activities Proposals

Type Of Event: 072 OUTGOING MISSION

Description: TECHNOLOGY TRANSFER MISSION

Priority: 1

Date: 05/88

Sector: 999 MULTIPLE SECTORS

Sub-Sector: 999 ALL SUB-SECTORS

Location: PITTSBURG

## Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 603 CLEVELAND		
Sector: 008 TRANSPORT SYS, EQUIP, COMP, SERV.		
010 FAIRS		
OHIO AUTO WHOLESALE SHOW	COLUMBUS	0490
NORTH AMERICAN SAIL & POWER BOAT SHOW	SANDUSKY	0989
NORTH AMERICAN SAIL & POWER BOAT SHOW	SANDUSKY	0990
Sector: 013 CONSUMER PRODUCTS		
010 FAIRS		
OHIO STATE GIFT SHOW	COLUMBUS	0390
OHIO STATE FAIR	COLUMBUS	0889
Sector: 014 EDUCATION, MEDICAL, HEALTH PROD		
010 FAIRS		
SOLO MEDICAL SHOW	CLEVELAND	0489
SAFETY EQUIPMENT EXHIBIT	PITTSBURG	0489
020 MISSION OUTGOING		
HOSPITAL EQUIPMENT SOLO SHOW	PITTSBURG/ERIE	0290
Sector: 016 INDUSTRIAL MACHIN, PLANTS, SERV.		
010 FAIRS		
AISE	PITTSBURG	0989
TRI STATE INDUSTRIAL SHOW	CINCINNATI	0489
TRI STATE INDUSTRIAL SHOW	CINCINNATI	0490
GREAT LAKES INDUSTRIAL SHOW	CLEVELAND	1189
GREAT LAKES INDUSTRIAL SHOW	CLEVELAND	1190
Sector: 999 MULTIPLE SECTORS		
020 MISSION OUTGOING		
SOURCING SEMINAR	OHIO	0589

## Export and Investment Promotion Planning System

## 88/89 Trade and Economic Overview

Mission: 604 DALLAS

Country: 577 UNITED STATES OF AMERICA

THE VALUE OF TOTAL TWO WAY TRADE BETWEEN CDA & THIS POST'S 6 STATE TERRITORY REACHED \$6.3 BN IN 86. CDN EXPORTS OF \$2.94 BN REPRESENTED A 9% DECREASE FM THE PREVIOUS YR WHILE CDN IMPORTS RECORDED A SLIGHT INCREASE TO REACH \$3.4 BN. THE RESULTS OF THE FIRST 6 MTHS OF 87 SEEM TO INDICATE THAT LEVELS FOR THE YR WILL BE VERY SIMILAR TO '86. EXPORTS TO JUNE HAVE TOTALED \$1.4 BN WHILE IMPORTS WERE \$1.8 BN. TEXAS IS BY FAR THE DOMINANT MKT, BY SIZE, POPULATION & POTEN'L, OF OUR 6 STATE TERRITORY, RANKING 14TH AMONG ALL U. S. STATES AS A CUSTOMER FOR CDN GDS. OF TOTAL CDN EXPORTS (\$1.3 B) TO THE STATE, TELECOMS EQPT., LUMBER, NEWS-PRINT, MOTOR VEHICLES & ORGANIC MATERIALS WERE THE MAJOR PRODS. OKLAHOMA WAS OUR 2ND MOST IMPORTANT MKT WITH EXPORTS VALUED AT \$509 MN, MOTOR VEHICLES ACCNTD FOR ONE-HALF OF THIS VALUE. OTHER PRODS WERE RADIOACTIVE ORES & INSTRUMENT'N. KANSAS WAS A CLOSE 3RD WITH CDN EXPORTS OF \$505 MN WHICH INCLUDED SUBSTANTIAL SALES OF MOTOR VEHICLES (\$140M) & AIRCRAFT ENGINES & PARTS (\$103M). OUR EXPORTS TO ARKANSAS INCREASED 57% FM THE PREVIOUS YEAR TO TOTAL \$290 MN OF WHICH OVER 50% WAS ALUMINUM. OTHER MAJOR EXPORTS TO ARKANSAS WERE SYNTHETIC RUBBER & PLASTIC MATERIALS, TOOLS & MOTOR VEHICLE PARTS. OUR EXPORTS TO LOUISIANA TOTALED \$259 MN & AGAIN MOTOR VEHICLES WERE BY FAR THE LARGEST EXPORT. FINALLY NEW MEXICO, WHERE OUR TOTAL EXPORTS, (\$47M) ALREADY SMALL, CONTINUE TO DECLINE. TELECOM EQPT (\$17M) IS OUR LARGEST EXPORT FOLLOWED BY NEWSPRINT. THE OIL/GAS IND. IS A VERY SIGNIFICANT COMPONENT OF THE ECONOMIES OF 5 OF THE 6 STATES (ARKANSAS EXCEPTED). OVER 100,000 JOBS HAVE BEEN LOST FM THE SECTOR. PRESENTLY, IT APPEARS THAT THE RECESSION OF '86 HAS BOTTOMED OUT FOR THE SECTOR IN GENERAL. THE NUMBER OF OPERATING RIGS HAVE INCREASED. EXPLORA'N BUDGETS ARE BEGINNING TO REFLECT SOME OPTIMISM. THE NUMBER OF SEISMIC CREWS HAVE INCREASED. HOWEVER, A STEADY IMPRVMT IN THE ENERGY SECTOR WILL NOT RESTORE THE IND. TO PREVIOUS LEVELS IN THE NEAR TERM. NOR WILL THE RATE OF RECOVERY BE THE SAME IN EACH OF THE STATES OF OUR TERRITORY. IN THE MEDIUM TERM, THE RECOVERY OF LOUISIANA & OKLAHOMA MAY TAKE LONGER THAN THE OTHER STATES IN OUR REGION. WHILE '87 WILL PROBABLY RECORD NO GROWTH, IT IS EXPECTED THAT '88 WILL SEE THE ECONOMY GROW AT ABOUT 2%. THE GROWTH WILL BE GENERATED BY THE MFTG SECTOR. IN TEXAS PARTICULARLY IT WILL BE LED BY THE AEROSPACE & ELECTRONICS IND., & THE SERVICE & RETAIL TRADE SECTORS. COMMER'L & RESIDEN'L CONSTRUC'N WILL CONTINUE TO DECLINE AS MOST MAJOR AREAS HAVE BEEN OVERBUILT. INFLA'N IS CURRENTLY APPROX 4%. UNEMPLOYMENT (APPROX. 7.5%) IS STILL HIGHER THAN THE NAT'L AVERAGE ALTHOUGH IT IS EXPECTED TO DROP SOMEWHAT OVER THE SHORT TO MEDIUM TERM. RETAIL SALES ARE PROJECTED TO GROW AT A RATE OF 7%. IN THE FUTURE, OUR SALES TO THE REGION WILL BE EF-FECTED BY THE OUTCOME OF THE FREE TRADE AGREEMENT. & CONVERSELY THE OUTCOME OF THE FREE TRADE AGREEMENT WILL BE AFFECTED BY THE

## Export and Investment Promotion Planning System

REPT: SYN-GEO 88/89 A. Post export program priorities

Region: UNITED STATES

Mission: 604 DALLAS

Market: 577 UNITED STATES OF AMERICA

The Mission selected the following sectors as priority areas for export promotion activities for the coming fiscal year:

## 1. 008 TRANSPORT SYS, EQUIP, COMP, SERV.

REASONS: MAJOR DECISIONS WITH RESPECT TO THE DALLAS URBAN TRANSIT SYST. WILL MOST LIKELY BE TAKEN IN FY88/89. MANY MAJOR AEROSPACE COS HAVE PLANTS OR MAJOR SUPPLIERS IN THIS REGION. 2 NAT'L SHOWS WHICH WILL ATTRACT

## 2. 001 AGRI &amp; FOOD PRODUCTS &amp; SERVICE

REASONS: BY VIRTUE OF THE NATURE OF OUR TERRITORY THERE ARE OPPS FOR CDN TIL-LAGE & SHORT LINE IMPLEMENTS & LIVESTOCK; ATTRACTIVE PRICING (EXCHANGE RATE) HAS RESULTED IN A HIGH LEVEL OF INTEREST. THE RELATIVELY HIGH

## 3. 004 DEFENCE PROGRAMS, PRODUCTS, SERV

REASONS: 2 USAF LOGISTICS BASES, WHICH EACH PURCHASE IN EXCESS OF \$3BUS PER YEAR OF EQPT, & MOST MAJOR PRIMES & SUB PRIMES IN THE AEROSPACE & DEFENCE IND. ARE LOCATED IN OUR TERRITORY OR HAVE PLANTS IN OUR TERRITORY.

## 4. 005 COMM. &amp; INFORM. EQP. &amp; SERV

REASONS: TEXAS IS ONE OF THE TOP 3 CENTRES IN THE US FOR HIGH TECH COMMUNICA'NS & ELECTRONICS FIRMS. STATE OF THE ART RESEARCH IS BEING DONE IN DALLAS & AUSTIN. WITH THE DEV. OF THE SPACE STATION AT NASA IN HSTN, & CDN

## 5. 011 OIL &amp; GAS EQUIPMENT, SERVICES

REASONS: WITH THE RETURN OF OIL PRICE STABILITY, BUSINESS OPPS IN THE US & 3RD WORLD MKTS SERVED BY HSTN-BASED TRADING HOUSES LOOKS PROMISING. THE POST'S HSTN OFFICE MAINTAINS CLOSE LIAISON WITH OIL/GAS CORP. HDQTRS

## 6. 013 CONSUMER PRODUCTS

REASONS: ALTHOUGH RETAIL SALES HAVE NOT RETURNED TO THEIR PREVIOUS LEVELS, COMPARATIVELY. WITH SUBSTANTIAL DISPOSABLE PERSONAL INCOME, TEXAS PARTICULARLY, IS A VERY ATTRACTIVE CONSUMER MKT. THE MOVE OF J. C. PENNY AND

The most important current Canadian export sectors to this market are (based on actual export sales):

1. 008 TRANSPORT SYS, EQUIP, COMP, SERV.

2. 009 FOREST PRODUCTS, EQUIP, SERVICES

3. 005 COMM. &amp; INFORM. EQP. &amp; SERV

4. 010 MINE, METAL, MINERAL PROD &amp; SRV

5. 012 PETROCHEM &amp; CHEM PROD, EQP, SERV

6. 016 INDUSTRIAL MACHIN, PLANTS, SERV.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 604 DALLAS

Market: 577 UNITED STATES OF AMERICA

Sector: 001 AGRI &amp; FOOD PRODUCTS &amp; SERVICE

Subsector: 015 SEMI &amp; PROCESSED FOOD &amp; DRINK

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	732.00M	\$ 717.00M	\$ 703.00M	\$ 681.00M
Canadian Exports \$	30.00M	\$ 28.00M	\$ 24.00M	\$ 19.00M
Canadian Share of Import Market	4.10%	3.90%	3.40%	2.80%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	090 %
ii) 349 MEXICO	031 %
iii) 047 BRAZIL	015 %
iv) 093 DENMARK	013 %
v) 112 FRANCE	005 %
vi) 051 UNITED KINGDOM	003 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 60-100 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) VARIOUS PROCESSED & SEMI-PROCESSED GOODS FOR/	\$ 218.00 M
ii) GOURMET FOODS AND PRODUCTS	\$ 87.00 M
iii) BEER	\$ 50.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- non competitive pricing
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

Export and Investment Promotion Planning System

MISSION: 604 DALLAS

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

- the adequacy of exporter information in Canadian Directories
- sourcing assistance from Canadian federal/provincial governments departments
- product/service information from Canadian companies

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: FAIRS ARE AN IMPORTANT ELEMENT OF OUR TRADE PROMOTION ACTIVITIES IN THIS SECTOR. THESE FAIRS ARE POST INITIATED AND POST ARGANIZED

Results Expected:

Activity: ORGANIZED AND RECRUIT APPROPRIATE COMPANIES TO PARTICIPATE IN THE TEXAS RETAIL GROCERS ASSOCIATION SHOW(JUNE 1988). OUR FIRST PARTICIPATION; TARGET IS 10 NEW COMPANIES.

Results Expected: SEVERAL NEW AGENCY/DISTRIBUTOR AGREEMENTS TO BE SIGNED.

Activity: ASSIST IN RECRUITING COMAPNIES FROM FOOD AND RESTAURANT EQUIPMENT SECTORS FOR PARTICIPATION IN THE TEXAS RESTAURANT ASSOCIATION SHOW (JUNE 1988). TARGET IS 20 COMPANIES.

Results Expected: " " " " " " " " "



## Export and Investment Promotion Planning System

BB/B9 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 604 DALLAS

Market: 577 UNITED STATES OF AMERICA

Sector: 001 AGRI &amp; FOOD PRODUCTS &amp; SERVICE

Subsector: 016 AGRICULTURE MACH, EQUIP, TOOLS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	512.00M	\$ 501.00M	\$ 492.00M	\$ 482.00M
Canadian Exports \$	40.00M	\$ 36.00M	\$ 35.00M	\$ 64.00M
Canadian Share of Import Market	7.80%	7.20%	7.10%	13.30%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	085 %
ii) 051 UNITED KINGDOM	034 %
iii) 128 GERMANY WEST	016 %
iv) 265 JAPAN	012 %
v) 349 MEXICO	010 %
vi) 112 FRANCE	009 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 60-100 \$M

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) TILAGE, SEED AND FERTILIZING EQUIPMENT	\$ 125.00 M
ii) GRAIN HARVESTING & HANDLING EQUIP. AND ACCESS.	\$ 110.00 M
iii) HAY & FORAGE HARVESTING & HANDLING EQUIPMENT	\$ 100.00 M
iv) TRACTORS	\$ 95.00 M
v) VARIOUS COMPONENTS, SPARES AND OTHER AGRIC.	\$ 70.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

## Export and Investment Promotion Planning System

MISSION: 604 DALLAS

COUNTRY: 577 UNITED STATES OF AMERICA

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- No factors reported by mission

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

**Activity:** FAIRS ARE IMPORTANT ELEMENT OF OUR TRADE PROMOTION ACTIVITIES IN THIS SECTOR. THEY ARE THE BEST MEDIUM TO REACH THE LARGEST NUMBER OF AGENTS AND END USERS.

**Results Expected:**

**Activity:** NATIONAL EXHIBIT AT 31 AGRICULTURAL MACHINERY AND EQUIPMENT SHOW , GREAT BEND, KS (APRIL 88). COORDINATE SHOW EXHIBIT DETAILS WITH UTE. TARGET IS 25 EXHIBITORS INCLUDING 10 NEW ONES.

**Results Expected:** SEVERAL NEW AGENCY/DISTRIBUTOR AGREEMENTS.  
PROJECTED SALES OF \$750,000 MILLIONS.

**Activity:** ORGANIZED AND RECRUIT CDN COMPANY PARTICIPATION IN AMARILLO FARM AND RANCH SHOW (NOV. 88). TARGET IS 10 NEW EXHIBITORS/PARTICIPANTS . THIS FAIR IS POST INITIATED AND POST ORGANIZED.

**Results Expected:** SEVERAL NEW AGENCY/DISTRIBUTOR AGREEMENT TO B  
-E SIGNED.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 604 DALLAS

Market: 577 UNITED STATES OF AMERICA

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import)	\$ 2000.00M	\$ 2000.00M	\$ 1900.00M	\$ 1600.00M
Canadian Exports	\$ 75.00M	\$ 60.00M	\$ 58.00M	\$ 71.00M
Canadian Share of Import Market	1.00%	1.00%	1.00%	1.00%

## Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	098 %
ii) 051 UNITED KINGDOM	003 %
iii) 232 ISRAEL	000 %
iv) 112 FRANCE	001 %
v) 128 GERMANY WEST	002 %
vi) 075 CANADA	003 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) STRUCTURES	\$ 0.00 M
ii) ENGINES - AIRCRAFT	\$ 0.00 M
iii) CASTING	\$ 0.00 M
iv) ELECTRONICS	\$ 0.00 M
v) INSTRUMENTATION	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- exports of certain products or services to this country are subject to Canadian export controls
- the degree of import duty protection of local industry tends to be low
- approval of technical standards can present problems in the case of some imported products

## Export and Investment Promotion Planning System

MISSION: 604 DALLAS

COUNTRY: 577 UNITED STATES OF AMERICA

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- the apparent limited sectoral capability in Canada compared to other competing export countries
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- non-tariff protectionist measures which are difficult to overcome
- other factor(s) described by the Trade Office as follows:

LACK OF KNOWLEDGE AND PURSUIT OF THIS MARKET BY CANADIAN EXPORTERS AND TIME CONSUMING BIDDING QUALIFICATION PROCEDURES.

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

- the adequacy of exporter information in Canadian Directories
- sourcing assistance from Canadian federal/provincial governments departments
- product/service information from Canadian companies

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

**Activity:** A COMPREHENSIVE SURVEY OF THE DEFENCE INDUSTRY, AEROSPACE AND ELECTRONICS, IN KANSAS, OKLAHOMA AND TEXAS.

**Results Expected:** INVENTORY OF SECTOR CONTACTS IN 3 STATES.  
OVERVIEW OF DEFENCE INDUSTRY IN 3 STATES.

**Activity:** 2 OUTGOING MISSIONS TO POST TERRITORY AND 1 INCOMING BUYER MISSION.

**Results Expected:** INCREASED THE NO. OF CN FIRMS BIDDING & ELIGIBLE TO BID AT U.S. LOGISTICS BASES IN REGION & TO PRIME & SUB-PRIME CONTRACTORS. INITIATE NEW SALES BOTH IN QTY & RANGE & INCREASE OVE/

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 604 DALLAS

Market: 577 UNITED STATES OF AMERICA

Sector: 005 COMM. &amp; INFORM. EQP. &amp; SERV

Subsector: 053 TELECOMMUNICATIONS (INC SPACE)

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	2400.00M	\$ 2100.00M	\$ 1500.00M	\$ 1500.00M
Canadian Exports \$	200.00M	\$ 170.00M	\$ 150.00M	\$ 193.00M
Canadian Share of Import Market	10.00%	10.00%	10.00%	12.00%

## Major Competing Countries

	Market Share
i) 577 UNITED STATES OF AMERICA	000 %
ii) 265 JAPAN	060 %
iii) 605 ASIA OR FAR EAST	024 %
iv) 349 MEXICO	008 %
v) 075 CANADA	003 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

	Current Total Imports In Canadian \$
i) AEROSPACE COMM.	\$ 100.00 M
ii) DIGITAL SWITCHING	\$ 25.00 M
iii) REMOTE SENSING	\$ 5.00 M
iv) RADIO TELEPHONE	\$ 0.00 M
v) TELECOMMUNICATIONS EQUIP.	\$ 200.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

## Export and Investment Promotion Planning System

MISSION: 604 DALLAS

COUNTRY: 577 UNITED STATES OF AMERICA

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- No factors reported by mission

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

**Activity:** SUPPORT CANADIAN COMPANIES IN THEIR EFFORTS TO BECOME QUALIFIED SUPPLIERS/SUBCONTRACTORS FOR THE SPACE STATION PROGRAM BY WORKING CLOSELY WITH SPAR AEROSPACE AND THE CANADIAN INDUSTRY.

**Results Expected:** EXPAND THE NUMBER OF CANADIAN COMPANIES SUPPLYING NASA SUBCONTRACTORS.

**Activity:** ENCOURAGE ACTIVE PARTICIPATION (6-8 COMPANIES) IN THE POST INITIATED/PST ORGANIZED SPACE TELECOM SHOW AND THE INSTRUMENT SOCIETY OF AMERICA SHOW.

**Results Expected:** INCREASED NUMBER OF LOCAL REPRESENTATIVES FOR CANADIAN COMPANIES. INCREASED SALES.

**Activity:** SUPPORT CANADIAN COMPANIES IN NEW EFFORTS TO OVERCOME ACCESS PROBLEMS.

**Results Expected:** INCREASED SALES.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 604 DALLAS

Market: 577 UNITED STATES OF AMERICA

Sector: 005 COMM. &amp; INFORM. EGP. &amp; SERV

Subsector: 054 COMPUTERS, SOFTWARE &amp; SYSTEMS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1984.00M	\$ 1945.00M	\$ 1907.00M	\$ 1869.00M
Canadian Exports \$	42.00M	\$ 37.00M	\$ 50.00M	\$ 66.00M
Canadian Share of Import Market	2.10%	1.90%	2.60%	3.50%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	060 %
ii) 268 KOREA	040 %
iii) 349 MEXICO	038 %
iv) 051 UNITED KINGDOM	037 %
v) 232 ISRAEL	022 %
vi) 265 JAPAN	015 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) OFFICE MACHINES	\$ 400.00 M
ii) COMPUTER PERIPHERALS	\$ 200.00 M
iii) APPLICATIONS SOFTWARE	\$ 50.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- non competitive pricing
- the apparent limited sectoral capability in Canada compared to other competing export countries
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- non-tariff protectionist measures which are difficult to overcome
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

## Export and Investment Promotion Planning System

MISSION: 604 DALLAS

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

- the adequacy of exporter information in Canadian Directories
- sourcing assistance from Canadian federal/provincial governments departments
- product/service information from Canadian companies

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

**Activity: A SYSTEMATIC PROGRAM OF MAILINGS AND FOLLOW UP CALLS ON MAJOR ELECTRONICS, COMPUTER AND OFFICE MACHINE MANUFACTURERS.**

**Results Expected: INCREASED SALES OF CANADIAN COMPONENTS.  
IDENTIFICATION OF POTENTIAL INVESTORS.**



## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 604 DALLAS

Market: 577 UNITED STATES OF AMERICA

Sector: 008 TRANSPORT SYS. EQUIP, COMP, SERV.

Subsector: 082 URBAN TRANSIT

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	82.00M	\$ 80.00M	\$ 78.00M	\$ 76.00M
Canadian Exports \$	10.00M	\$ 5.00M	\$ 8.00M	\$ 11.00M
Canadian Share of Import Market	12.20%	6.30%	10.30%	14.50%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	090 %
ii) 265 JAPAN	039 %
iii) 349 MEXICO	032 %
iv) 128 GERMANY WEST	021 %
v) 507 SWEDEN	005 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 30-60 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) *LIGHT RAIL VEHICLES	\$ 100.00 M
ii) SPECIAL PURPOSE BUSES	\$ 2.00 M
iii) TRANSIT CONSULTING SERVICES	\$ 1.00 M

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

## i) Project Name: DALLAS AREA RAPID TRANSIT LIGHT RAIL PROJECT

Approximate Value: \$ 3600.0 M  
 Financing Source: 012 DOM  
 For further info. please contact:  
 D. BIEBER, DALLAS 214-922-9806

## ii) Project Name: HOUSTON METROPOLITAN TRANSIT AUTH. LIGHT RAIL PROJECT

Approximate Value: \$ 5000.0 M  
 Financing Source: 012 DOM  
 For further info. please contact:  
 D. BIEBER, DALLAS 214-922-9806

## Export and Investment Promotion Planning System

MISSION: 604 DALLAS

COUNTRY: 577 UNITED STATES OF AMERICA

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

iii) Project Name: CAPITAL METRO TRANSIT AUSTIN, TX  
(LIGHT RAIL)

Approximate Value: \$ 1100.0 M

Financing Source: 012 DDM

For further info. please contact:

D. BIEBER, DALLAS 214-922-9806

iv) Project Name: REGIONAL TRANSIT AUTHORITY NEW ORLEANS,  
LA (LIGHT RAIL)

Approximate Value: \$ 2400.0 M

Financing Source: 012 DDM

For further info. please contact:

D. BIEBER, DALLAS 214-922-9806

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- non-tariff protectionist measures which are difficult to overcome
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade missions
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada
- the availability of competitive Canadian financing

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: PERIODIC MEETINGS WITH KEY TRANSIT STAFF AND BOARD MEMBERS IN AUSTIN, HOUSTON, NEW ORLEANS, CORPUS CHRISTI AND OTHERS  
TOTAL 6 PER YEAR

Results Expected: ONGOING MARKET INTELLIGENCE FOR GOVERNMENT/  
INDUSTRY SOURCES.

Export and Investment Promotion Planning System

MISSION: 604 DALLAS

COUNTRY: 577 UNITED STATES OF AMERICA

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: PARTICIPATION IN REGIONAL TRANSPORTATION CONFERENCES AND SEMINARS (SWTA, TXPT).

Results Expected: INCREASED EXPOSURE FOR CDN GOODS AND SERVICES

Activity: LIAISON AND MEETINGS WITH DALLAS (DART) IN RELATION TO A POSSIBLE EDC PRESENTATION ON EXPORT FINANCING.

Results Expected: SALES AND FINANCING OF CDN LIGHT RAIL EQUIPMENT AND SERVICES (APPROXIMATELY \$100 MILLION)

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 604 DALLAS

Market: 577 UNITED STATES OF AMERICA

Sector: 008 TRANSPORT SYS. EQUIP, COMP, SERV.

Subsector: 083 MARINE INDUSTRIES

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	51.00M	\$ 50.00M	\$ 50.00M	\$ 46.35M
Canadian Exports \$	25.50M	\$ 25.00M	\$ 22.00M	\$ 20.00M
Canadian Share of Import Market	50.00%	50.00%	44.00%	43.00%

## Major Competing Countries

	Market Share
i) 265 JAPAN	020 %
ii) 434 TAIWAN	020 %
iii) 038 BELGIUM	004 %
iv) 268 KOREA	004 %
v) 112 FRANCE	003 %
vi) 507 SWEDEN	001 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) DRILLING EQUIPMENT	\$ 0.00 M
ii) RESCUE BOATS	\$ 0.00 M
iii) EQUIPMENT AND PARTS FOR FLOATING DRILL RIGS	\$ 0.00 M
iv) SHIP CONTROLS	\$ 0.00 M
v) DYNAMIC POSITIONING	\$ 0.00 M
vi) PROPULSION SYSTEMS	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- there are import restrictions which can present significant problems

## Export and Investment Promotion Planning System

MISSION: 604 DALLAS

COUNTRY: 577 UNITED STATES OF AMERICA

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- non competitive financing from Canada
- the apparent limited sectoral capability in Canada compared to other competing export countries
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- non-tariff protectionist measures which are difficult to overcome

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- strong sectoral capability in Canada

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

**Activity:** TRADE SHOWS ARE A VITAL ELEMENT IN IDENTIFYING AND MAXIMIZING EXPOSURE TO BOTH DOMESTIC & FOREIGN CLIENTS. OUR ACTIVITIES WILL INCLUDE: PARTICIPATION OTC 88 WITH TARGET OF EXPANDING EXHIBITION PARTICIPATION TO MORE THAN 40.

**Results Expected:** TO IDENTIFY NEW & EXISTING PROJECTS WHERE CANADIAN MANUFACTURERS HAVE AN OPPORTUNITY TO BE ADDED TO THE QUALIFIED PARTS LIST.

**Activity:** WORK BOAT SHOW PARTICIPATION TO INCLUDE 10 CANADIAN FIRMS.  
-A PROGRAM OF CALLS ON OFFSHORE DRILLING CONTRACTORS AND MULTINATIONAL OIL COMPANIES.  
-WE WILL BE CONCENTRATING ON OPPORTUNITIES IN THE PROPULSION.

**Results Expected:** TO INCREASE SALES AND AGENTS.

**Activity:** PROGRAM OF CALLS ON THIRD COUNTRY PROCUREMENT OFFICES TO ENCOURAGE CANADIAN SOURCING.

**Results Expected:** TO INCREASE SALES AND AGENTS.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 604 DALLAS

Market: 577 UNITED STATES OF AMERICA

Sector: 008 TRANSPORT SYS. EQUIP. COMP. SERV.

Subsector: 085 AEROSPACE

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	974.20M	\$ 955.10M	\$ 936.30M	\$ 515.37M
Canadian Exports \$	104.04M	\$ 102.00M	\$ 100.00M	\$ 319.66M
Canadian Share of Import Market	10.00%	10.00%	10.00%	30.00%

## Major Competing Countries

## Market Share

i) 349 MEXICO	020 %
ii) 051 UNITED KINGDOM	009 %
iii) 265 JAPAN	003 %
iv) 237 ITALY	002 %
v) 128 GERMANY WEST	002 %
vi) 047 BRAZIL	002 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) AIRCRAFT & HELICOPTER & PARTS.	\$ 545.53 M
ii) ENGINES & PARTS	\$ 445.25 M
iii) HARDWARE	\$ 132.01 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- difficulties of adaptation of marketing techniques to the market by some Canadian companies

## Export and Investment Promotion Planning System

MISSION: 604 DALLAS

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

**Activity:** POST INITIATED FAIRS AND MISSIONS ARE A MAJOR FACTOR IN MAXIMIZING BUSINESS OPPORTUNITIES AND INDUSTRY EXPOSURE. NATIONAL BUSINESS AIRCRAFT ASSOCIATION SHOW: OUR TARGET IS TO RECRUIT 8 NEW EXHIBITORS FROM CANADIAN INDUSTRY.

**Results Expected:** TO INCREASE SALES OF CANADIAN MANUFACTURED AIRCRAFT AND PARTS. INCREASE NUMBER OF CDN COMPANIES REPRESENTED IN THE TERRITORY.

**Activity:** HELICOPTER ASSOCIATION INTERNATIONAL SHOW: OUR TARGET IS TO HAVE AT LEAST 10 NEW CDN EXHIBITORS FOR THIS SHOW. WE WILL BE MAKING A SERIES OF CALLS ON COMMERCIAL AEROSPACE MANUFACTURERS AND SUPPLIERS.

**Results Expected:** TO INCREASE THE NUMBER OF CANADIAN COMPANIES ON THE MANUFACTURERS SPECIFICATION SHEETS.

**Activity:** PURCHASING AGENTS CONVENTION - WICHITA, KANSAS.

**Results Expected:** TO MEET THE MAJOR PURCHASING DECISION-MAKERS IN THE BUSINESS. DRAW UP A USEFUL AEROSPACE CONTACT LIST AND ADVISE CANADIAN COMPANIES OF CONTACTS AND OPPORTUNITIES.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 604 DALLAS

Market: 577 UNITED STATES OF AMERICA

Sector: 011 OIL &amp; GAS EQUIPMENT, SERVICES

Subsector: 116 MACHINERY AND EQUIPMENT

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1600.00M	\$ 1400.00M	\$ 1600.00M	\$ 1700.00M
Canadian Exports \$	13.30M	\$ 13.00M	\$ 12.50M	\$ 13.70M
Canadian Share of Import Market	10.00%	10.00%	10.00%	10.00%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	060 %
ii) 265 JAPAN	044 %
iii) 128 GERMANY WEST	012 %
iv) 051 UNITED KINGDOM	010 %
v) 038 BELGIUM	006 %
vi) 268 KOREA	004 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports In Canadian \$	
i) EQUIPMENT, PARTS & MACHINERY	\$ 24.30 M
ii) GAS	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- exports of certain products or services to this country are subject to Canadian export controls
- the degree of import duty protection of local industry tends to be low



## Export and Investment Promotion Planning System

MISSION: 604 DALLAS

COUNTRY: 577 UNITED STATES OF AMERICA

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- non-tariff protectionist measures which are difficult to overcome
- other factor(s) described by the Trade Office as follows:

AMERICAN GAS BUBBLE WHICH SHOULD DISSIPATE WINTER OF 1987-88.

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

**Activity:** PROGRAM OF CALLS ON MAJOR U.S. GAS TRANSMISSION, PIPELINE AND END-USER COMPANIES TO DISCUSS FTA ENERGY PROVISIONS.

**Results Expected:** INCREASED SALES OF NATURAL GAS.

**Activity:** SOLICIT 6-8 CANADIAN PARTICIPANTS/EXHIBITORS FOR THE 1988 SOCIETY OF PETROLEUM ENGINEERS SHOWS.  
RECRUIT INCOMING BUYERS TO THE NATIONAL PETROLEUM SHOW.

**Results Expected:** NEW AGENCIES AND SOFTWARE SALES.

**Activity:** DISCUSS WITH MAJOR U.S. FIRMS THE VALUE OF CANADIAN SOURCING FOR TURNKEY PROJECTS USING CCC, CIDA AND EDC.

**Results Expected:** MAJOR CANADIAN EQUIPMENT AND SERVICES SOURCING FOR THIRD COUNTRY PROJECTS.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 604 DALLAS

Market: 577 UNITED STATES OF AMERICA

Sector: 013 CONSUMER PRODUCTS

Subsector: 131 APPAREL (CLOTH, FUR, SHOES) TEXT

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	3119.00M	\$ 3058.00M	\$ 2998.00M	\$ 2938.00M
Canadian Exports \$	11.00M	\$ 9.00M	\$ 10.00M	\$ 15.00M
Canadian Share of Import Market	0.40%	0.30%	0.30%	0.50%

## Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	075 %
ii) 349 MEXICO	045 %
iii) 434 TAIWAN	005 %
iv) 192 PEOPLE'S REP OF CHINA	002 %
v) 616 OTHER COUNTRIES	048 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 30-60 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) WOMEN'S FASHION APPAREL	\$ 150.00 M
ii) FUR COATS	\$ 50.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- there are import restrictions which can present significant problems
- the degree of import duty protection of local industry tends to be moderate

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- the unsuitability of Canadian products for this market
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- high tariffs
- non-tariff protectionist measures which are difficult to overcome
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

## Export and Investment Promotion Planning System

MISSION: 604 DALLAS

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

- the adequacy of exporter information in Canadian Directories
- sourcing assistance from Canadian federal/provincial governments departments
- product/service information from Canadian companies

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: RECRUITMENT OF INCOMING BUYERS TO CANADA FOR MONTREAL INTERNATIONAL FUR FAIR (MAY 1988).

Results Expected: NEW EXPORT SALES AND NEW AGENCY AGREEMENTS TO BE SIGNED.

Activity: RECRUITMENT OF BUYERS FOR CANADIAN FESTIVAL OF FASHION (MARCH 1989).

Results Expected: NEW AGENCY AGREEMENTS TO BE SIGNED.

Activity: EXPAND CONTRACTS WITH AGENTS AND SALES REPRESENTATIVES ON BEHALF OF CANADIAN APPAREL AND TEXTILE COMPANIES THROUGH SYSTEMATIC PROGRAM OF CALLS IN DALLAS AND OTHER CITIES.

Results Expected: NEW AGENCY AGREEMENTS AND DIRECT SALES TO RETAIL LEVEL.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 604 DALLAS

Market: 577 UNITED STATES OF AMERICA

Sector: 013 CONSUMER PRODUCTS

Subsector: 135 FURNITURE &amp; APPLIANCES

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	336.00M	\$ 329.00M	\$ 323.00M	\$ 316.00M
Canadian Exports \$	80.00M	\$ 78.00M	\$ 69.00M	\$ 56.00M
Canadian Share of Import Market	23.80%	23.70%	21.40%	17.70%

## Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	085 %
ii) 349 MEXICO	052 %
iii) 434 TAIWAN	013 %
iv) 237 ITALY	004 %
v) 051 UNITED KINGDOM	004 %
vi) 128 GERMANY WEST	004 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) CONTRACT FURNITURE (OFFICE & INSTITUTIONAL)	\$ 407.00 M

The Trade Office reports that the following factors influence Canadian  
export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector  
(sub-sector) in this market is lower than optimum mainly because of:

- No factors reported by mission

## Export and Investment Promotion Planning System

MISSION: 604 DALLAS

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

**Activity:** THIS MKT. IS FUNDAMENTALLY TIED TO SHOWS & MISSIONS. WE INTEND TO EXPAND ON THE NUMBER OF BUYERS THROUGH INCOMING MISSIONS AND BY USE OF THE AD BUYER VISIT PROGRAM TO CDN. FACILITIES AS OPPORTUNITIES ARISE. (THE RELOCATION OF VARIOUS CO. HEADQUARTERS/

**Results Expected:** TO MAINTAIN & EXPAND THIS SOLID FOOHOLD IN THE U.S. SOUTHWEST.

DATE: 88/01/25

DEPARTMENT OF EXTERNAL AFFAIRS

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 604 DALLAS

Country: 577 UNITED STATES OF AMERICA

### Highlights of Investment Environment

Estimated Value Of Equity Investment  
In Canada From This Post Territory:

\$ 0.00 M

Estimated Value Of Annual Direct Equity  
Investments To All Destinations From  
This Post Territory:

\$ 0.00 M

Country Destinations Of Direct  
Equity Investment From Post  
Territory

Estm. Value  
\$ CDN

% Of Annual Direct Equity  
Investment Outflows By  
Category Of Investors

1. 075 CANADA	\$ 0.00 M	1. Corporations : 70.00 %
2. 349 MEXICO	\$ 0.00 M	2. Institutional : 9.00 %
3. 322 SAUDI ARABIA	\$ 0.00 M	3. Entrepreneurs : 20.00 %
4. 214 INDONESIA	\$ 0.00 M	4. Immigrant Entr.: 1.00 %

The Mission Has Reported Factors That Tend To Change  
Outward Flows Of Investment From The Post Territory Including:

- Corporate Search For Cheaper Production And/Or Operating Costs  
Outside The Country
- Corporate Expansion To Seek New Markets
- Corporate Expansion To Serve Better Existing Markets

The Mission Reports That Investors From The Post Territory Who Invest Abroad  
In Manufacturing Tend To Invest In The Following Sector(s) Subsector(s)

-SECTOR(S)-

-SUBSECTOR(S)-

1. 014 EDUCATION, MEDICAL, HEALTH PROD
2. 013 CONSUMER PRODUCTS
3. 005 COMM. & INFORM. EGP. & SERV

056 ELECTRONIC COMPONENTS

DATE: 88/01/25

DEPARTMENT OF EXTERNAL AFFAIRS

PAGE: 125b

Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 604 DALLAS

Country: 577 UNITED STATES OF AMERICA

#### Equity Propensity Of Key Sources Of Investment From This Territory

Corporations : 100% Ownership Of Existing Corporate Facility  
Institutional :  
Entrepreneurs : Start-up Investment To Create New Enterprise (On A Joint Basis)  
Immigrant Entr.: Start-up Investment To Create New Enterprise (100% Ownership)

#### Sector Preferences By Type Of Key Investors

Corporations : Resource Development  
Institutional : Portfolio Investment  
Entrepreneurs : Manufacturing Industries  
Immigrant Entr.: Manufacturing Industries

#### Investment Promotion Priority Sectors Sub-Sectors Program Plans And Anticipated Results.

Sector : 001 AGRI & FOOD PRODUCTS & SERVICE  
Subsector: 116 MACHINERY AND EQUIPMENT

#### Reason(s):

THIS TERRITORY IS HDQTRRS OF MANY MAJOR OIL/GAS COS & ENERGY RELATED COS. THE IND. HAS EFFECTIVELY SHAKEN OUT. THE CURRENT CDN INVSTMT CLIMATE IS VERY ATTRACTIVE TO BOTH PRDCRS & SRVC COS. MOST MAJOR OIL

#### Program Plans:

THROUGH A SYSTEMATIC PROGRAM OF VISIT AND FOLLOW UP WITH MAJOR PRODUCTION, TRANSMISSION AND SERVICE COMPANIES IN THE ENERGY FIELD.

Anticipated Results: 3 NEW INVESTMENTS IN CANADA BY MARCH 1989.

Sector : 006 ELECTRONICS EQUIP. & SERV  
Subsector: 061 PRODUCTS & COMPONENTS

#### Reason(s):

TEXAS IS ONE OF THE 3 LEADING HIGH TECH RGNS OF THE U.S. WITH PARTICULAR STRENGTH IN DEF. ELECT., COMPUTERS & OTHER OFFICE MACHINES. ONE CO. ALONE HAS SPAWNED OVER 800 HIGH TECH COS OF SOME VARIA'N. AS GROWTH

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DEPARTMENT OF EXTERNAL AFFAIRS

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 604 DALLAS

Country: 577 UNITED STATES OF AMERICA

Investment Promotion Priority Sectors Sub-Sectors  
Program Plans And Actipicipated Results.

Sector : 006 ELECTRONICS EQUIP. & SERV  
Subsector: 061 PRODUCTS & COMPONENTS

Program Plans:

THE SELECTIVE PURCHASE OF MAILING LISTS OF MAJOR ELECTRONIC AND COMPUTER MANUFACTURERS WITH EMPHASIS ON TEXAS: TO BE FOLLOWED BY A DIRECT MAIL CAMPAIGN AND THEN A SERIES OF PERSONAL CALLS.

Anticipated Results: IDENTIFICATION OF 10 REAL POTENTIAL INVESTORS IN CANADA.

Sector : 014 EDUCATION, MEDICAL, HEALTH PROD  
Subsector: 141 PHARMACEUTICALS, BIOTECHNOLOGY

Reason(s):

BOTH DALLAS/HSTN HAVE WORLD CLASS MED. CENTRES. HSTN'S ALONE EMPLOYS OVER 55,000 PEOPLE. THIS LARGE CONCENTRA'N OF MED. FACILITIES & KNOWHOW HAS LED TO THE CREATION OF BIOTECH RESEARCH COS SPONSORED BY CORPS AND

Program Plans:

SUBSEQUENT TO MAILING TO THE MEDICAL INDUSTRY IN THE FALL OF 1987, TO IDENTIFY AND SELECT 2-4 POLITICAL CANDIDATES TO SEN TO CANBIOCAN AND TO MEET WITH CANADIAN INDUSTRY.

Anticipated Results: TO ESTABLISH DISCUSSION BETWEEN AT LEAST ONE CANADIAN AND TEXAS COMPANY FOR PATENT LICENSING OR JOINT VENTURE IN THE BIO-TECHNOLOGY FIELD.



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DEPARTMENT OF EXTERNAL AFFAIRS

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 604 DALLAS

Country: 577 UNITED STATES OF AMERICA

**Other Investment Program Plans**

**Activity(ies):**

TO HOLD TWO GENERAL SEMINARS ON TRADE AND INVESTMENT. ONE IN DALLAS MAY 1988 TO REACH A RANGE OF POTENTIAL INVESTORS AND ONE IN ANOTHER STATE - YET TO BE DETERMINED - PROBABLY KANSAS.

**Anticipated Results:** TO RAISE THE PROFILE OF CANADA AS A GOOD PLACE TO INVEST. TO REACH A RANGE OF INVESTORS.

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DEPARTMENT OF EXTERNAL AFFAIRS

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 604 DALLAS

Country: 577 UNITED STATES OF AMERICA

Investment Promotion Activities Proposals

Type Of Event: 010 MINISTERIAL MISSION

Description: IF A MIN. VISITS OTC 88 THIS WLD PROVIDE AN EXCEL.

Priority: Date: 05/88

Sector: 011 OIL & GAS EQUIPMENT, SERVICES

Sub-Sector: 119 SERVICES INCLUDING CONSULTING

Location: HOUSTON

Type Of Event: 040 DIRECT MAIL CAMPAIGN

Description: IDENTIFICA'N OF COS OF CERTAIN SIZE WITH INTEREST

Priority: Date: 07/88

Sector: 006 ELECTRONICS EQUIP. & SERV

Sub-Sector: 999 ALL SUB-SECTORS

Location: TEXAS

Type Of Event: 050 SEMINARS

Description: SEM. ON TRADE/INVSTMT IN CDA TO INCLUDE REPS FROM

Priority: Date: 05/88

Sector: 999 MULTIPLE SECTORS

Sub-Sector: 999 ALL SUB-SECTORS

Location: DALLAS

Type Of Event: 070 OTHER PROMOTIONAL EVENTS

Description: THE NATURE OF THE OIL/GAS IND. IS SUCH THAT ONE ON

Priority: Date: 00/88

Sector: 011 OIL & GAS EQUIPMENT, SERVICES

Sub-Sector: 999 ALL SUB-SECTORS

Location: TEXAS

DATE: 88/01/25

DEPARTMENT OF EXTERNAL AFFAIRS

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 604 DALLAS

Country: 577 UNITED STATES OF AMERICA

Investment Promotion Activities Proposals

Type Of Event: 071 INCOMING MISSION

Description: IDENTIFICA'N OF COS OF CERTAIN SIZE WITH INTEREST

Priority: Date: 04/88

Sector: 014 EDUCATION, MEDICAL, HEALTH PROD

Sub-Sector: 999 ALL SUB-SECTORS

Location: TEXAS

## Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 604 DALLAS		
Sector: 001 AGRI & FOOD PRODUCTS & SERVICE		
010 FAIRS		
3I AGRICULTURE EQUIPMENT SHOW	GREAT BEND	0490
3I AGRICULTURE EQUIPMENT SHOW	GARDEN CITY	0489
TEXAS RESTAURANT ASSOCIATION SHOW	HOUSTON	0689
TEXAS RETAIL GROCERS ASSOCIATION	HOUSTON	0689
CANADIAN WESTERN AGRIBITION	REGINA	1189
AMARILLO FARM & RANCH SHOW	AMARILLO	1189
TEXAS NURSERYMEN ASSOCIATION SHOW	DALLAS	0889
AMARILLO FARM & RANCH SHOW	AMARILLO	1190
TEXAS NURSERYMEN ASSOCIATION SHOW	DALLAS	0890
TEXAS RESTAURANT ASSOCIATION SHOW	DALLAS	0690
TEXAS RETAIL GROCERS ASSOCIATION	HOUSTON	0690
024 MISSION INCOMING		
WESTERN CANADA FARM PROGRESS SHOW	REGINA	0690
CANADIAN WESTERN AGRIBITION	REGINA	1190
WESTERN CANADA FARM PROGRESS SHOW	REGINA	0689
Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV		
020 MISSION OUTGOING		
DEFENCE INDUSTRY MISSION	KANSAS/OKLAHOMA	0989
DEFENCE MISSION	KANSAS/OKLAHOMA/TEX.	0589
DEFENCE INDUSTRY MISSION	OKLAHOMA	1190
DEFENCE MISSION	KANSAS	0590
Sector: 005 COMM. & INFORM. EQP. & SERV		
010 FAIRS		
SPACE TECHNOLOGY	HOUSTON	1190
SPACE TECHNOLOGY	HOUSTON	1189
Sector: 008 TRANSPORT SYS, EQUIP, COMP, SERV.		
010 FAIRS		
OFFSHORE TECHNOLOGY CONFERENCE	HOUSTON	0589
OFFSHORE TECHNOLOGY CONFERENCE	HOUSTON	0590
NATIONAL BUSINESS AIRCRAFT ASSOCIATION	NEW ORLEANS	1090
WORK BOAT SHOW	NEW ORLEANS	1190
HELICOPTER ASSOCIATION INTERNATIONAL	DALLAS	0291
WORK BOAT SHOW	NEW ORLEANS	1189
HELICOPTER ASSOCIATION INTERNATIONAL	DALLAS	0290
024 MISSION INCOMING		
TORONTO BOAT SHOW	TORONTO	0190

## Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 604 DALLAS		
Sector: 008 TRANSPORT SYS, EQUIP, COMP, SERV.		
024 MISSION INCOMING TORONTO BOAT SHOW	TORONTO	0191
Sector: 011 OIL & GAS EQUIPMENT, SERVICES		
010 FAIRS		
SOCIETY OF PETROLEUM ENGINEERS	SAN ANTONIO	1089
SOCIETY OF PETROLEUM ENGINEERS	NEW ORLEANS	0990
INSTRUMENT SOCIETY OF AMERICA	DALLAS	1090
SOCIETY OF EXPLORATION GEOPHYSICISTS	DALLAS	1089
024 MISSION INCOMING		
INTERCAN	EDMONTON	0689
NATIONAL PETROLEUM SHOW	CALGARY	0690
Sector: 013 CONSUMER PRODUCTS		
024 MISSION INCOMING		
BUYER RECRUITMENT - MONTREAL FUR FAIR	MONTREAL	0589
INTERNATIONAL INTERIOR DESIGN EXPOSITION	TORONTO	0990
BUYER RECRUITMENT - MONTREAL FUR FAIR	MONTREAL	0590
TORONTO FURNITURE SHOW	TORONTO	0190
INTERNATIONAL INTERIOR DESIGN EXPOSITION	TORONTO	0989
TORONTO FURNITURE SHOW	TORONTO	0191

## Export and Investment Promotion Planning System

## 88/89 Trade and Economic Overview

Mission: 605 DETROIT

Country: 577 UNITED STATES OF AMERICA

MICHIGAN, THE HUB OF NORTH AMERICAN AUTO PRODUCTION IS STILL THE WORLD'S AUTOMOBILE CAPITAL. THE CITY OF TOLEDO, OHIO & THE STATE OF INDIANA, WHICH COMPRISE THE REMAINDER OF THE POST TERRITORY UNDERLINE THE CREDIBILITY OF THAT BOLD STATEMENT. HEADQUARTERS TO THE "BIG 3" & THE SITE OF MORE THAN 30% OF NORTH AMERICAN PRODUCTION, THE POST TERRITORY CONTINUE TO BE THE RECIPIENT ANNUALLY OF BILLIONS OF DOLLARS IN NEW CAPITAL INVESTMENTS. THE BUSINESS TREND IS NOT DOWN EITHER AS THE NEW NORTH AMERICAN ASSEMBLER ENTRANTS AND THEIR "PARTS FAMILY" MEMBERS INVEST ALSO IN OUR TERRITORY - WITNESS THE OFFICIAL SEPT. 1987 OPENING OF THE MAZDA PLANT IN FLAT ROCK, MICH. & THE ONGOING CONSTRUCTION FOR THE ISUZU-FHI (SUBARU) JOINT VENTURE ASSEMBLY PLANT IN BLOOMINGTON, INDIANA. THE AUTO INDUSTRY REMAINS TO THE ECONOMIES IN OUR TERRITORY AS CRITICAL TO THEM AS THE AUTO INDUSTRY IS TO THE ECONOMY OF ONT. NO WONDER, THEREFORE, THAT MICH. LEGISLATORS HAVE BEEN CAUTIOUS TO ACCEPT THE FREE TRADE AGREEMENT AS THEY VIEW THE FUTURES OF THEIR OWN AUTO & MANUFACTURING IND. WITHIN A POSSIBLE CHANGED TRADING ENVIRONMENT IN WHICH THEY ARE NOT YET CONVINCED THE "PLAYING FIELD IS LEVEL". THOUGH THE 1987 MODEL YEAR WAS A RECORD YEAR FOR THE BIG 3 & PROSPECTS REMAIN GOOD FOR 1988 SALES (14 MILLION-15 MILLION CAR & TRUCK UNITS) ORGANIZATIONS REMAIN SENSITIVE TO COST CUTTING-PRODUCTIVITY IMPROVEMENT MEASURES. CHRYSLER, FOR EXAMPLE, WILL THIN ITS WHITE COLLAR STAFF BY 10% (3500 JOBS) IN NOV/88 & OVER THE NEXT 3 YEARS CUT ANOTHER OF THAT JOB CLASS 3% PER YEAR. MOREOVER CHRYSLER MANAGEMENT HAS CLEARLY SIGNALLED THAT ONE OF ITS ASSEMBLY PLANTS WILL BE CLOSED & SOON. INDUSTRY FOLLOWERS NEED NOT BE REMINDED THAT GM LAST YEAR ANNOUNCED 10 PLANT CLOSINGS & A REDUCTION OF 29,000 WORKERS. THE AUTO IND. IS THEREFORE DELIBERATELY & CONFIDENTLY RESTRUCTURING ITSELF TO MEET THE CHALLENGES OF THE FUTURE BY SUCH DOWNSIZING & INVEST. IN NEW FACILITIES & NEW TECHNOLOGIES. THE POST SEES THESE IN ADDITION TO THE FREE TRADE AGREEMENT IMPLEMENTATION PROCESS AS DRIVING OUR RESOURCE ALLOCATION & WORK PROGRAM IN THE NEXT PLANNING PERIOD. THE VITALITY OF THE LOCAL ECONOMIES MAY HINGE ON THE AUTO IND. BUT AS MATURE ECONOMIES THEIR SECTORAL DIVERSIFICATION IS IMPRESSIVE, ENCOMPASSING AGRICULTURE (MICHIGAN RANKS SECOND ONLY TO CALIF.) FOREST IND., MORE GENERALLY THE METALWORKING & PLASTICS IND., IN ADDITION OF COURSE TO A DIVERSIFIED & INDEED POWERFUL SERV. IND. INFRASTRUCTURE. A RECENT "FUTURES" STUDY CONDUCTED BY ARTHUR ANDERSON & THE DETROIT FREE PRESS DETAILED HOW THE MICH. ECONOMY COMPRISES THE CRITICAL MASS NECESSARY TO REMAIN A MAJOR IND. PLAYER IN THE USA ECONOMIC STRUCTURE. SOME OF THOSE CRITICAL MASS ELEMENTS INCLUDE THE THIRD HIGHEST R & D EXPENDITURES (AFTER ONLY CALIF. & N. Y.), OUTSTANDING RESEARCH FACILITIES AT UNIVERSITIES & PRIVATE CORP. (DOW CHEMICAL R & D BUDGET IN 1987 WILL BE ABOUT \$647 MILLION) & A SHARED COMMITMENT FROM INDUSTRY, STATE GOVT., ACADEMICS & LABOUR TOWARDS PROMOTING SUCH

## Export and Investment Promotion Planning System

REPT: SYN-GEO 88/89 A. Post export program priorities

Region: UNITED STATES

Mission: 605 DETROIT

Market: 577 UNITED STATES OF AMERICA

The Mission selected the following sectors as priority areas for export promotion activities for the coming fiscal year:

## 1. 008 TRANSPORT SYS, EQUIP, COMP, SERV.

REASONS: THE MAIN SECTOR IN OUR TERRITORY RE SALES. DUE TO AUTO PACT AND NEW FTA THERE IS AVAILABLE MARKET ACCESS FOR CANADIAN SUPPLIERS.

## 2. 004 DEFENCE PROGRAMS, PRODUCTS, SERV

REASONS: THIS TERRITORY INCLUDES 3 U.S. MILITARY INSTALLATIONS WITH COMBINED ANNUAL PROCUREMENT BUDGETS IN EXCESS OF U.S. \$7 BILLION. OPPORTUNITIES EXIST FOR SUB-CONTRACTING TO U.S. PRIMES. MKT IS FIERCELY COMPETITIVE.

## 3. 001 AGRI &amp; FOOD PRODUCTS &amp; SERVICE

REASONS: FOOD SALES ARE PREDICTED TO GO UP AS A RESULT OF THE NEW U.S. TAX BILL FATTENING PAY CHEQUES. DISTRIBUTORS ARE LOOKING TO DIVERSIFY PRODUCT LINES; CDN FOOD PROD. ARE OF HIGH QUALITY & EXCHANGE RATE AIDS PRICE-COMP

## 4. 005 COMM. &amp; INFORM. EQP. &amp; SERV

REASONS: THERE IS A HIGH CONCENTRATION OF COS RESEARCHING & DEVELOPING STATE-OF-THE-ART TECHN. FOR MANUFACTURING APPLICATIONS. ELECTRONIC COMPONENTRY IN AUTOS WILL INCREASE BY MORE THAN 300% DURING NEXT DECADE.

## 5. 009 FOREST PRODUCTS, EQUIP, SERVICES

REASONS: ANTICIPATE ANNOUNCEMENTS OF 2 NEW PULP MILL PROJ., A WOOD PANEL MANUFACTURING PLANT & A LARGE EXPANSION OF FURNITURE MANUFACTURING IN MICH. SAME EXPECTED TO OFFER EXCELLENT POTENTIAL FOR CDN SUPPLIERS.

## 6. 013 CONSUMER PRODUCTS

REASONS: REASONABLY STRONG PERFORMANCE IS FORECAST FOR THE CONSUMER PROD. SECT., PARTICULARLY IN DURABLE GOODS. THANKS TO CONTINUING LOW MORTGAGE INTEREST RATES & A MODERATELY HEALTHY HOME BLDG PICTURE IN THE POST TERRI.

The most important current Canadian export sectors to this market are (based on actual export sales):

1. 008 TRANSPORT SYS, EQUIP, COMP, SERV.
2. 001 AGRI & FOOD PRODUCTS & SERVICE
3. 004 DEFENCE PROGRAMS, PRODUCTS, SERV
4. 009 FOREST PRODUCTS, EQUIP, SERVICES
5. 016 INDUSTRIAL MACHIN. PLANTS, SERV.
6. 012 PETROCHEM & CHEM PROD, EQP, SERV

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 605 DETROIT

Market: 577 UNITED STATES OF AMERICA

Sector: 001 AGRI &amp; FOOD PRODUCTS &amp; SERVICE

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	0.00M	\$ 3400.00M	\$ 3100.00M	\$ 3000.00M
Canadian Exports \$	0.00M	\$ 412.00M	\$ 320.00M	\$ 311.00M
Canadian Share of Import Market	0.00%	12.00%	10.00%	10.00%

Major Competing Countries

Market Share

1) 577 UNITED STATES OF AMERICA

085 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects

Current Total Imports

In Canadian \$

i) FISH AND SEAFOOD	\$ 38.00 M
ii) PROCESSED FOOD	\$ 136.00 M
iii) ALCOHOL	\$ 146.00 M

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

i) Project Name: NO PERTINENT INFORMATION ON THIS SECTOR AVAILABLE AT THIS TIME.

Approximate Value: \$ M

Financing Source:

For further info. please contact:

RONALD MIKULAK (313) 567-2340

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low



## Export and Investment Promotion Planning System

MISSION: 605 DETROIT

COUNTRY: 577 UNITED STATES OF AMERICA

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- No factors reported by mission

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: UPDATE OF DETROIT GROCERY PRODUCT MARKET.

Results Expected: EXPECTED TO BE COMPLETED BY FIRST QUARTER 1988.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: SEVEN INFORMAL PRESENTATIONS OF FOOD PRODUCTS TO AGENYS, BROKERS, HOTEL FOOD MANAGERS, INCLUDING SEAFOOD WHOLESALERS AND RESTAURANT OWNERS.

Results Expected: INCREASED PROFILE FOR PROCESSED FOODS SECTOR, AND ENTRY OF 8 NEW PRODUCTS INTO MARKET.

Activity: WINE PROMOTION AT ANNUAL ASSOCIATED FOOD DEALERS ASSOCIATION IN DETROIT WITH SIMILAR PROGRAM IN INDIANAPOLIS.

Results Expected: 3 NEW WINE PRODUCTS INTRODUCED INTO TERRITORY

Activity: SOLO FOOD PRESENTATION FEATURING 30 CANADIAN PROCESSED FOOD AND BEVERAGE MANUFACTURERS.

Results Expected: INTRODUCED NEW PRODUCT LINES TO U.S. AGENTS, BROKERS AND WHOLESALERS, DISTRIBUTORS, FOOD STORE PURCHASING PERSONNEL IN TERRITORY.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 605 DETROIT

Market: 577 UNITED STATES OF AMERICA

Sector: 002 FISHERIES, SEA PRODUCTS &amp; SERV.

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	0.00M	\$ 0.00M	\$ 0.00M	\$ 0.00M
Canadian Exports \$	0.00M	\$ 57.00M	\$ 55.00M	\$ 0.00M
Canadian Share of Import Market	0.00%	20.00%	20.00%	0.00%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA

000 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are  
good market prospects

Current Total Imports

In Canadian \$

- i) FRESH/FRESH FROZEN FISH
- ii) FROZEN PROCESSED FISH
- iii) SHELLFISH

\$ 0.00 M

\$ 0.00 M

\$ 0.00 M

Projects or portion of projects which are still in the planning  
stage and for which Canadian companies might have reasonable prospects.i) Project Name: RENO DATA ON MAJOR PROJECTS AVAILABLE AT  
THIS TIME.

Approximate Value: \$ N/A M

Financing Source:

For further info. please contact:

RONALD MIKULAK (313)567-2340

The Trade Office reports that the following factors influence Canadian  
export performance in this market for this sector (sub-sector).

Export and Investment Promotion Planning System

MISSION: 605 DETROIT

COUNTRY: 577 UNITED STATES OF AMERICA

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- No factors reported by mission

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: NONE PREVIOUSLY STATED.

Results Expected:

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: REPORT ON PROPOSED UP-DATE OF FDA REGULATIONS FOR COLD PROCESSED SMOKED FISH.

Results Expected: NEW MARKET FOR PRODUCT IN MICHIGAN.

Activity: INTRODUCE SEAFOOD PRODUCTS TO WHOLESALERS, GROCERY CHAINS AND RESTAURANTS.

Results Expected: ENTRY OF 5 NEW FIRMS INTO MARKET.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 605 DETROIT

Market: 577 UNITED STATES OF AMERICA

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	450.00M	\$ 450.00M	\$ 570.00M	\$ 565.00M
Canadian Exports \$	150.00M	\$ 150.00M	\$ 285.00M	\$ 283.40M
Canadian Share of Import Market	33.00%	33.00%	50.00%	50.00%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	095 %
ii) 232 ISRAEL	001 %
iii) 051 UNITED KINGDOM	001 %
iv) 354 NETHERLANDS	001 %
v) 507 SWEDEN	001 %
vi) 237 ITALY	001 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Market share declining

## Products/services for which there are good market prospects

## Current Total Imports

	In Canadian \$
i) ARMoured VEHICLES	\$ 0.00 M
ii) AUTOMOTIVE PARTS	\$ 100.00 M
iii) OVER-SNOW VEHICLES	\$ 15.00 M
iv) SONOBOYS	\$ 50.00 M
v) SPECIALIZED TRUCKS/TRAILERS	\$ 0.00 M
vi) ELECTRONIC COMPONENTS	\$ 10.00 M
vii) VEHICLES HEATERS	\$ 0.00 M
viii) ARMOUR PLATE	\$ 15.00 M
ix) ROADWHEELS/TRACK	\$ 10.00 M
x) PNEUMATIC TIRES	\$ 6.00 M

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

i) Project Name: ARMORED FAMILY OF VEHICLES  
(SUBCONTRACTING)

Approximate Value: \$ 275000 M

Financing Source: 012 DOM

For further info. please contact:

D. W. SHEARER (3130574-5233 OR 567-2340)

## Export and Investment Promotion Planning System

MISSION: 605 DETROIT

COUNTRY: 577 UNITED STATES OF AMERICA

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

ii) Project Name: FAMILY OF MEDIUM TACTICAL VEHICLE  
(SUBCONTRACTING)

Approximate Value: \$ 6000 M

Financing Source: 012 DOM

For further info. please contact:

J. R. GUILLETTE (613) 996-3518

iii) Project Name: MIAI ABRAMS MAIN BATTLE TANK  
(SUBCONTRACTING)

Approximate Value: \$ 6000 M

Financing Source: 012 DOM

For further info. please contact:

D. W. SHEARER - J. R. GUILLETTE

iv) Project Name: LIGHT AND HEAVY TACTICAL VEHICLES

Approximate Value: \$ 1000 M

Financing Source: 012 DOM

For further info. please contact:

D. W. SHEARER - J. R. GUILLETTE.

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- exports of certain products or services to this country are subject to Canadian export controls

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- non competitive pricing
- non-tariff protectionist measures which are difficult to overcome

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada
- the existence of a bilateral economic/trade arrangement between Canada and this country

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

## Export and Investment Promotion Planning System

MISSION: 605 DETROIT

COUNTRY: 577 UNITED STATES OF AMERICA

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: CONTINUE TO IDENTIFY AND CULTIVATE KEY CONTACTS AT COMPANIES INVOLVED IN U. S. MILITARY PRODUCTION AT PRIME CONTRACTOR AND MAJOR SUBCONTRACTOR LEVELS, FOR INTRODUCTION TO CANADIAN BUSINESS AND GOVERNMENT REPRESENTATIVES, AS APPROPRIATE.

Results Expected: INCREASED SUBCONTRACTING OPPORTUNITIES FOR CANADIAN COMPANIES.

Activity: THROUGH DDSA WORKING GROUP AT TACOM AND CONTACTS AT NAVAL AVIONICS (NAC) AND NAVAL WEAPONS SUPPORT CENTERS (NWSC) IDENTIFY AND RECOMMEND POTENTIAL JOINT DEVELOPMENT PROJECTS.

Results Expected: ADDITIONAL OPPORTUNITIES FOR CANADIAN PARTICIPATION IN U. S. R & D PROJECTS AND SUBSEQUENT PRODUCTION.

Activity: WORK CLOSELY WITH COMPETITION ADVOCATES AT TACOM, NAC AND NWSC TO INCREASED AWARENESS OF DDSA, OPSA AND CANADIAN INDUSTRIAL CAPABILITIES.

Results Expected: ADDITIONAL SALES OPPORTUNITIES.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ESTABLISHED PROGRAM TO EXHIBIT, ON REGULAR BASIS, CANADIAN VEHICLES, PRODUCTS AND TECHNOLOGY AT TACOM THROUGH COOPERATION OF THE FOREIGN INTELLIGENCE DIVISION.

Results Expected: ENHANCED AWARENESS OF CANADIAN PRODUCTS AND CAPABILITIES. ADDITIONAL JOINT DEVELOPMENT POSSIBILITIES.

Activity: DISTRIBUTE POST-PRODUCED PROFILE OF TERRITORY DEFENCE MARKET TO GOVERNMENT AND INDUSTRY IN CANADA.

Results Expected: INCREASED CANADIAN AWARENESS OF MARKET POTENTIAL.

Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 605 DETROIT

Market: 577 UNITED STATES OF AMERICA

Sector: 005 COMM. & INFORM. EQP. & SERV

Subsector:

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import)	\$ 2600.00M	\$ 2575.00M	\$ 2400.00M	\$ 2300.00M
Canadian Exports	\$ 160.00M	\$ 159.00M	\$ 153.00M	\$ 146.00M
Canadian Share of Import Market	6.20%	6.20%	6.00%	6.40%

Major Competing Countries

Market Share

i) 265 JAPAN	050 %
ii) 620 EUROPE	012 %
iii) 434 TAIWAN	008 %
iv) 268 KOREA	006 %
v) 467 SINGAPORE	006 %
vi) 349 MEXICO	006 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) WORKPLACE AUTOMATION	\$ 50.00 M
ii) TELECOMMUNICATIONS	\$ 45.00 M
iii) ELECTRONIC COMPONENTS	\$ 20.00 M
iv) ROBOTICS. ARTIFICIAL INTELLIGENCE	\$ 17.00 M

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

i) Project Name: ISUFU/FUJI ASSEMBLY PLANT  
Approximate Value: \$ M  
Financing Source: 012 DOM  
For further info. please contact:  
D. BINGEMAN 313-567-2340

ii) Project Name: CHRYSLER JEFFERSON AVE ASSEMBLY PLANT  
Approximate Value: \$ M  
Financing Source: 012 DOM  
For further info. please contact:

## Export and Investment Promotion Planning System

MISSION: 605 DETROIT

COUNTRY: 577 UNITED STATES OF AMERICA

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada
- the availability of competitive Canadian financing

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: IDENTIFICATION OF PUBLISHED ECONOMIC AND COMMERCIAL STUDIES OF U.S. AUTOMOTIVE ELECTRONICS MARKET AND EVALUATION AS TO EFFECTIVENESS AS MARKETING TOOL FOR CANADIAN SUPPLIERS.

Results Expected: PURCHASE OF ONE OR MORE QUALIFIED STUDIES FOR DISSEMINATION TO CANADIAN INDUSTRY.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: WORKSHOP IN CONJUNCTION WITH UTD AND DRIE, TORONTO REGIONAL OFFICE TO INTRODUCE AUTOMOTIVE ELECTRONICS MARKET STUDY TO INDUSTRY.

Results Expected: TO SOLICIT ACTIVE PARTICIPATION OF AT LEAST SIX CANADIAN SUPPLIERS IN FOCUSED EXPORT THRUST AT AUTOMOTIVE ASSEMBLY/SUB-ASSEMBLIES.



## Export and Investment Promotion Planning System

MISSION: 605 DETROIT

COUNTRY: 577 UNITED STATES OF AMERICA

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ORGANIZED TWO INVESTMENT ORIENTED SEMINARS. ONE TO BE HELD IN GRAND RAPIDS, MICHIGAN IN NOV. 88 AND THE OTHER TO BE HELD IN INDIANAPOLIS, INDIANA IN FEBRUARY 89.

Results Expected: EXPOSE AT LEAST 2 TO 4 INVESTMENT LEADS FROM ATTENDEES.

Activity: ON-GOING ATTENDANCE AND PARTICIPATION IN BI-MONTHLY EVENTS ORGANIZED BY MICHIGAN TECHNOLOGY COUNCIL (ANN ARBOR, MI).

Results Expected: IDENTIFY 3 TO 5 POTENTIAL TECHNOLOGY TRANSFER OPPORTUNITIES UTILIZING TECHNOLOGY INFLOW PROGRAM.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 605 DETROIT

Market: 577 UNITED STATES OF AMERICA

Sector: 007 POWER &amp; ENERGY EQUIP. &amp; SERV.

Subsector: 077 ELECTRICAL MACHINES &amp; SYSTEMS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	0.00M	\$89240.00M	\$ 0.00M	\$ 0.00M
Canadian Exports \$	21000.00M	\$17000.00M	\$ 0.00M	\$ 0.00M
Canadian Share of Import Market	20.00%	18.00%	0.00%	0.00%

## Major Competing Countries

	Market Share
i) 512 SWITZERLAND	026 %
ii) 265 JAPAN	023 %
iii) 504 FINLAND	014 %
iv) 128 GERMANY WEST	012 %
v) 112 FRANCE	005 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 5-15 \$M

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) STEAM GENERATORS	\$ 0.00 M
ii) BOILERS	\$ 0.00 M
iii) SUPERHEATERS ECONOMIZERS	\$ 0.00 M
iv) TURBINES	\$ 0.00 M
v) PARTS FOR ABOVE	\$ 0.00 M

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

i) Project Name: DO NOT HAVE MARKET INFORMATION ON THIS DATE.

Approximate Value: \$ M

Financing Source:

For further info. please contact:

PETER WRIGHT (313) 567-2340

## Export and Investment Promotion Planning System

MISSION: 605 DETROIT

COUNTRY: 577 UNITED STATES OF AMERICA

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- other factor(s) described by the Trade Office as follows:

LITTLE AWARENESS AT POST OF ANY EXPORT MARKETING PROGRAMS BY CANADIAN COMPANIES.

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- strong sectoral capability in Canada

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: NONE RECORDED.

Results Expected:

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: VISIT LEADING UTILITIES AND USERS OF ELECTRICAL MACHINES AND SYSTEMS.

Results Expected: IDENTIFY MARKET FOR PRODUCTS IN SUBSECTOR.

Activity: REQUEST DIRECTION FROM COMMODITY MARKETING OFFICERS IN THIS SECTOR AS TO CAPABILITY OF CANADIAN SUPPLIERS.

Results Expected: ESTABLISH A PRODUCT PACKAGE WITH WHICH TO ESTABLISH U.S. MARKET.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 605 DETROIT

Market: 577 UNITED STATES OF AMERICA

Sector: 008 TRANSPORT SYS. EQUIP. COMP. SERV.

Subsector: 081 AUTOMOTIVE

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	0.00M	\$ 150.00M	\$ 0.00M	\$ 0.00M
Canadian Exports \$	21600.00M	\$21400.00M	\$21200.00M	\$21300.00M
Canadian Share of Import Market	13.90%	14.30%	13.10%	12.90%

## Major Competing Countries

Market Share

- |                                 |       |
|---------------------------------|-------|
| i) 577 UNITED STATES OF AMERICA | 052 % |
| ii) 265 JAPAN                   | 030 % |
| iii) 608 WEST EUROPE            | 007 % |

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Mature with little growth

Products/services for which there are  
good market prospects

Current Total Imports

	In Canadian \$
i) AUTOMOBILE	\$ 12.10 M
ii) TRUCKS	\$ 4.20 M
iii) ENGINE PARTS	\$ 1.10 M
iv) OTHER AUTO PARTS	\$ 4.20 M

Projects or portion of projects which are still in the planning  
stage and for which Canadian companies might have reasonable prospects.

- i) Project Name: SATURN CORP. (DIV. OF G.M.)  
Approximate Value: \$ M  
Financing Source:  
For further info. please contact:  
R. P. ROBERTSON 313-567-2340

- ii) Project Name: MAZDA (U.S.A.)  
Approximate Value: \$ M  
Financing Source:  
For further info. please contact:  
R. P. ROBERTSON 313-567-2340

## Export and Investment Promotion Planning System

MISSION: 605 DETROIT

COUNTRY: 577 UNITED STATES OF AMERICA

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

iii) Project Name: NIPPONDENSO (BATTLE CREEK, MICHIGAN)  
Approximate Value: \$ M  
Financing Source:  
For further info. please contact:  
R. P. ROBERTSON 313-567-2340

iv) Project Name: ISUZU/FIJI (INDIANA)  
Approximate Value: \$ M  
Financing Source:  
For further info. please contact:  
R. P. ROBERTSON 313-567-2340

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- other factor(s) described by the Trade Office as follows:  
THE REDUCTION OF SUPPLIER BASE IS FORCING CANADIAN COMPANIES TO REVERT TO SUPPLYING TO BIG THREE VIA THE SECOND TIER SUPPLIERS IF THEY ARE NOT THEMSELVES TIER ONE.

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada
- the existence of a bilateral economic/trade arrangement between Canada and this country
- the availability of competitive Canadian financing

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

## Export and Investment Promotion Planning System

MISSION: 605 DETROIT

COUNTRY: 577 UNITED STATES OF AMERICA

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: REVIEW AND INTERVIEW AGENTS/REPS FOR THE AUTOMOTIVE SECTOR.

Results Expected: ACQUIRE A "SHORT LIST" OF QUALITY REPRESENTATIVES FOR USE BY CANADIAN FIRMS IN MICHIGAN/INDIANA

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: DIRECT INVOLVEMENT BY OFFICIALS FROM OTTAWA TO VISIT WITH SENIOR MANAGEMENT OFFICERS OF THE MAJOR AUTOMOTIVE MANUFACTURERS IN OUR TERRITORIES.

Results Expected: DELIVER INFORMATION PERTAINING TO CANADA'S AUTOMOTIVE STRATEGY AND TRADE POLICIES IN LIEU OF LEARNING SAME FROM CANADIAN SUBSIDIARIES.

Activity: ISSUANCE OF "AUTOMOTIVE NEWSLETTER" (QUARTERLY) WITH DISTRIBUTION UP TO 600 CANADIAN PARTS AND COMPONENT MANUFACTURERS.

Results Expected: KEEP CANADIAN INDUSTRY ADVISED OF NEW DEVELOPMENTS IN TERRITORY.

Activity: ENHANCED LIAISON WITH PARTS MANUFACTURERS, SUPPLIERS AND OEM'S AS WELL AS ASSOCIATIONS WITHIN OUR TERRITORY.

Results Expected: ALLOW U. S. INDUSTRY AN UNDERSTANDING AND KNOWLEDGE OF CANADIAN POLICIES (TRADE) AND AUTOMOTIVE STRATEGIS.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 605 DETROIT

Market: 577 UNITED STATES OF AMERICA

Sector: 009 FOREST PRODUCTS, EQUIP, SERVICES

Subsector: 096 EQUIPMENT AND MACHINERY

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	0.00M	\$ 2.90M	\$ 0.00M	\$ 0.00M
Canadian Exports \$	0.00M	\$ 1.00M	\$ 0.00M	\$ 0.00M
Canadian Share of Import Market	0.00%	35.00%	0.00%	0.00%

## Major Competing Countries

## Market Share

i) 504 FINLAND	038 %
ii) 265 JAPAN	015 %
iii) 507 SWEDEN	012 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 1-3 \$M

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) GRAPPLE SKIDDERS	\$ 0.00 M
ii) DEBARKERS	\$ 0.00 M
iii) PAPERFORMER	\$ 0.00 M
iv) FABRICATED STEEL PANELS & PARTS	\$ 0.00 M
v) FURNITURE HARDWARE	\$ 0.00 M
vi) 4-WHEEL DRIVE OFF-HIGHWAY VEHICLES.	\$ 0.00 M

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

i) Project Name: EGPT. & MACH. INCLUDING CONST. SERV. TO NEW PULP MILL DEVELOPMENTS.

Approximate Value: \$ 100000 M

Financing Source: 012 DOM

For further info. please contact:

P. WRIGHT (313)-567-2340

ii) Project Name: GROWTH & DEV. IN EASTERN UPPER PENINSULA OF MICHIGAN IN COMPOSITE WOOD PANEL IND.

Approximate Value: \$ 50,000 M

Financing Source: 012 DOM

For further info. please contact:

P. WRIGHT (313) 567-2340

## Export and Investment Promotion Planning System

MISSION: 605 DETROIT

COUNTRY: 577 UNITED STATES OF AMERICA

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

- iii) Project Name: EXPANSION OF PRODUCTION IN GRAND RAPIDS  
OF STEELCASE, HERMAN MILLER, HAWORTH IN FU  
Approximate Value: \$ 150000 M  
Financing Source: 012 DOM  
For further info. please contact:  
P. WRIGHT (313) 567-2340

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- the apparent limited sectoral capability in Canada compared to other competing export countries

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade fairs
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: N/A

Results Expected:

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: CANVAS MAJPR COMPANIES IN (1) PULP & PAPER (2) COMPOSITE WOOD PRODUCTS AND (3) SECONDARY MANUFACTURING FURNITURE AND BUILDING PRODUCTS FOR SALE OPPORTUNITIES.

Results Expected: \$100,000. IN NEW BUSINESS.



Export and Investment Promotion Planning System

MISSION: 605 DETROIT

COUNTRY: 577 UNITED STATES OF AMERICA

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: CONTACT LEADING DISTRIBUTORS/DEALERS OF FORESTRY EQUIPMENT AND MACHINERY TO MAXIMIZE CANADIAN REPRESENTATION - IN PARTICULAR AREAS OF NEW PLANT DEVELOPMENT.

Results Expected: 6 NEW APPOINTMENTS.

Activity: MEET WITH LEADING MEMBERS OF GOVERNMENT AND TRADE ASSOCIATIONS BOTH STATE AND FEDERAL TO MAINTAIN UP-TO-DATE INFORMATION BACKGROUND ON THE INDUSTRY.

Results Expected: DETAILS OF LEGISLATION, ASSOCIATION PROGRAMS AND CURRENT ACTIVITIES OF INTEREST IN SECTOR.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 605 DETROIT

Market: 577 UNITED STATES OF AMERICA

Sector: 010 MINE, METAL, MINERAL PROD &amp; SRV

Subsector: 104 METALS, PRIMARY &amp; FABRICATED

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	0.00M	\$ 0.00M	\$ 0.00M	\$ 0.00M
Canadian Exports \$	0.00M	\$ 0.00M	\$ 0.00M	\$ 0.00M
Canadian Share of Import Market	0.00%	5.00%	0.00%	0.00%

## Major Competing Countries

## Market Share

i) 047 BRAZIL	032 %
ii) 265 JAPAN	023 %
iii) 268 KOREA	018 %
iv) 609 EUROPEAN COMMON MARKET C	015 %
v) 001 ARGENTINA	005 %
vi) 594 VENEZUELA	001 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects

Current Total Imports In Canadian \$

i) METALS, PRIMARY AND FABRICATED. \$ 0.00 M

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

i) Project Name: MAJOR BLDG &amp; CONST. PROG. (IND, COMM, RESIDENTIAL &amp; PUB WORKS).

Approximate Value: \$ M

Financing Source:

For further info. please contact:

ii) Project Name: INCLUDING NEW BRIDGES, REPLACEMENT OF EXISTING BRIDGES &amp; HIGHWAY INTERCHANGES.

Approximate Value: \$ M

Financing Source:

For further info. please contact:

## Export and Investment Promotion Planning System

MISSION: 605 DETROIT

COUNTRY: 577 UNITED STATES OF AMERICA

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

iii) Project Name: NEW PULP MILL CONSTRUCTION AND GROWTH IN  
COMPOSITE WOOD PANEL IND. SECTOR.

Approximate Value: \$ M

Financing Source:

For further info. please contact:

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- there are import restrictions which can present significant problems
- exports of certain products or services to this country are subject to Canadian export controls

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- other factor(s) described by the Trade Office as follows:  
VOLUNTARY RESTRAINT MECHANISM IN EFFECT IMPOSED BY U.S. TO RESTRICT TOTAL VOLUME OF STEEL FROM CANADA TO 3% TOTAL INTO U.S.

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: CONTINUING TO MONITOR FEDERAL GOVERNMENT ANNOUNCEMENTS ON MATTERS EFFECTING IMPORTS OF STEEL AND OTHER METALS.

Results Expected:

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: MOST OF THE METALS EXPORTED ARE CONSIGNED TO THE AUTOMOTIVE INDUSTRY IN THE PRODUCTION OF CARS, TRUCKS AND RELATED EQUIPMENT. THE PATTERNS OF SUPPLY AND DISTRIBUTION ARE WELL ESTABLISHED AND THE CANADIAN EXPORT.

Results Expected:

Export and Investment Promotion Planning System

MISSION: 605 DETROIT

COUNTRY: 577 UNITED STATES OF AMERICA

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: VOLUME ATTAINABLE IS SUBJECT TO A FIRMLY MONITORED VOLUNTARY RESTRAINT SYSTEM BY U.S. CUSTOMS/COMMERCE. POST WILL CONTINUE TO OBSERVE PATTERNS OF SUPPLY AND DISTRIBUTION AND BRING INFORMATION ON NEW OPPORTUNITIES TO SUPPLY TO THE ATTENTION OF CDN COMPANIES.

Results Expected:

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 605 DETROIT

Market: 577 UNITED STATES OF AMERICA

Sector: 011 OIL &amp; GAS EQUIPMENT, SERVICES

Subsector: 113 PETROLEUM AND PRODUCTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	0.00M	\$ 0.00M	\$ 0.00M	\$ 0.00M
Canadian Exports \$	0.00M	\$ 0.00M	\$ 0.00M	\$ 0.00M
Canadian Share of Import Market	12.00%	10.00%	0.00%	0.00%

## Major Competing Countries

## Market Share

i) 611 MIDDLE EAST OR NEAR EAST	080 %
ii) 349 MEXICO	009 %
iii) 594 VENEZUELA	001 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are  
good market prospects

Current Total Imports  
In Canadian \$

i) NATURAL GAS	\$ 0.00 M
ii) PIPE - REPLACEMENT & NEW INSTALLATION	\$ 0.00 M
iii) CONTROLS FOR PIPE LINE DISTRIBUTION.	\$ 0.00 M

Projects or portion of projects which are still in the planning  
stage and for which Canadian companies might have reasonable prospects.

i) Project Name: TOXIC WASTE REFUSE INCINERATORS  
Approximate Value: \$ M  
Financing Source: 012 DOM  
For further info. please contact:  
PETER WRIGHT (313) 567-2340

ii) Project Name: ALL MAJOR CITIES IN TERRITORY  
Approximate Value: \$ M  
Financing Source:  
For further info. please contact:  
PETER WRIGHT (313) 567-2340

## Export and Investment Promotion Planning System

MISSION: 605 DETROIT

COUNTRY: 577 UNITED STATES OF AMERICA

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- exports of certain products or services to this country are subject to Canadian export controls

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters
- other factor(s) described by the Trade Office as follows:  
UNTIL RECENT REMOVAL OF EXPORT CONTROLS - NATURAL GAS RESTRICTED BY FEDERAL ENERGY BOARD REFUSAL TO ALLOW EXPORT OF NATURAL GAS WHEN SAME NEEDED IN CANADA.

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: MARKET ANALYSIS OF POTENTIAL VOLUME SALE/DISTRIBUTION IN TERRITORY.

Results Expected: SUBSTANTIAL INCREASE IN SALES AND VOLUME OF NATURAL GAS THROUGH POST TERRITORY.

Activity: VISITATION TO MAJOR USERS - INCLUDING UTILITIES - HEAVY INDUSTRIAL - COMMERCIAL AND MUNICIPAL PURCHASING COMMISSIONS.

Results Expected:

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 605 DETROIT

Market: 577 UNITED STATES OF AMERICA

Sector: 012 PETROCHEM &amp; CHEM PROD, EQP, SERV

Subsector: 121 CHEM &amp; PETROCHEM PRODUCTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1.40M	\$ 1.40M	\$ 0.00M	\$ 0.00M
Canadian Exports \$	1.38M	\$ 1.32M	\$ 0.00M	\$ 0.00M
Canadian Share of Import Market	27.00%	26.00%	0.00%	0.00%

## Major Competing Countries

## Market Share

i) 354 NETHERLANDS	023 %
ii) 265 JAPAN	021 %
iii) 047 BRAZIL	013 %
iv) 128 GERMANY WEST	012 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 60-100 \$M

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) FEED STOCK TO PROCESSOR	\$ 0.00 M
ii) TRANSPORTATION (COMPOSITES)	\$ 0.00 M
iii) CONSTRUCTION (WALL PANEL)	\$ 0.00 M
iv) PACKAGING CONTAINERS - AUTOMOTIVE (JUST-IN-TIME)	\$ 0.00 M
v) CONSUMER PRODUCTS-BOTTLES, CONTAINERS OF ALL SORTS	\$ 0.00 M

Projects or portion of projects which are still in the planning  
stage and for which Canadian companies might have reasonable prospects.

- i) Project Name: DO NOT HAVE MARKET INFO ON THIS TO DATE.  
Approximate Value: \$ M  
Financing Source:  
For further info. please contact:  
P. WRIGHT (313) 567-2340

## Export and Investment Promotion Planning System

MISSION: 605 DETROIT

COUNTRY: 577 UNITED STATES OF AMERICA

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- there are import restrictions which can present significant problems
- exports of certain products or services to this country are subject to Canadian export controls

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- No factors reported by mission

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- No factors reported by mission

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: NONE PLANNED IN PREVIOUS YEAR.

Results Expected:

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: VISIT TO KEY INDUSTRIAL USERS IN MARKET SECTOR INCLUDING THOSE USING FEED STOCK AND LARGE SCALE PRODUCERS OF COMPOSITES.

Results Expected: ENHANCED AWARENESS OF CANADIAN PRODUCTS AND INCREASED SALES DEVELOPMENT POSSIBILITIES.

Activity: ATTEND PROJECTS WHERE THERE IS REQUIREMENT FOR USE OF MATERIAL MADE FROM PETROCHEMICALS, I.E. BUILDING PROJECTS.

Results Expected:

Activity: GENERALLY EXPLORE MARKET FOR QUANTITY USES AND/OR APPLICATIONS OF PETROCHEMICALS - PULP & PAPER ADHESIVES -STEEL, AGRICULTURE, ETC.

Results Expected:



## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 605 DETROIT

Market: 577 UNITED STATES OF AMERICA

Sector: 013 CONSUMER PRODUCTS

Subsector:

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	0.00M	\$ 401.00M	\$ 0.00M	\$ 0.00M
Canadian Exports \$	0.00M	\$ 40.50M	\$ 0.00M	\$ 0.00M
Canadian Share of Import Market	0.00%	10.00%	0.00%	0.00%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	085 %
ii) 265 JAPAN	003 %
iii) 609 EUROPEAN COMMON MARKET C	002 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 30-60 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports In Canadian \$

i) APPAREL	\$ 0.00 M
ii) CONTRACT FURNITURE	\$ 0.00 M
iii) RESIDENTIAL FURNITURE	\$ 0.00 M
iv) LEISURE PRODUCTS	\$ 0.00 M
v) SPORTING GOODS	\$ 0.00 M

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

i) Project Name: EXPANSION OF INDIANAPOLIS-BASED "PAUL HARRIS" WOMEN'S WEAR RET. 1000 UNITS/1982

Approximate Value: \$ M

Financing Source: 012 DOM

For further info. please contact:

R. MIKULAK (313) 567-2340

## Export and Investment Promotion Planning System

MISSION: 605 DETROIT

COUNTRY: 577 UNITED STATES OF AMERICA

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: CANADIAN ORIENTED PROGRAM AT LOCAL CHAPTER OF ASID (AMERICAN SOCIETY OF INTERIOR DESIGNERS).

Results Expected: TO BE CONCLUDED BEFORE END OF FY88/89.

Activity: MAILING TO LOCAL FURNITURE INDUSTRY TO ASCERTAIN INTEREST IN JOINT-VENTURES, TECHNOLOGY TRANSFER.

Results Expected: MAILING IS COMPLETED. RESULTS TO BE REVIEWED WITH UTM & DRIE/OTT/JFCP REGARDING FOLLOW-UP.

Activity: DEVELOP MARKET DATA ON MAJOR FURNITURE RETAILERS IN TERRITORY.

Results Expected: PREPARATION OF CONCISE "MARKET DIRECTORY" FOR INCLUSION WITH RESPONSE TO CANADIAN ENQUIRERS IN PROGRESS.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: PROMOTE PREVIEW OF CANADIAN PRODUCTS AT NATIONAL SPORTING GOODS ASSOCIATION BY LOCAL DISTRIBUTORS AND MANUFACTURERS AGENTS.

Results Expected: 5 NEW AGENCY AGREEMENTS.

Export and Investment Promotion Planning System

MISSION: 605 DETROIT

COUNTRY: 577 UNITED STATES OF AMERICA

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: CONTINUE UPGRADING OF CONTACTS IN RESIDENTIAL AND CONTRACT FURNITURE INDUSTRY.

Results Expected: MAINTAIN CURRENT LEVEL OF ATTENDANCE AT IDEX EXPO. EXPAND INTEREST IN CDN. PRODUCTS IN RESIDENTIAL/RETAIL SECTOR.

Activity: DEVELOP NEW PROGRAM OF "PRODUCT INTRODUCTORY DAYS" WITH BUYERS AND MERCHANDISE MANAGERS ATK-MART CORPORATE BUYING OFFICES, DETROIT.

Results Expected: ESTABLISH 3 NEW PRODUCT LINES.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 605 DETROIT

Market: 577 UNITED STATES OF AMERICA

Sector: 015 CONSTRUCTION INDUSTRY

Subsector: 151 BUILDING PRODUCTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size (import) \$	0.00M	\$ 0.00M	\$ 0.00M	\$ 0.00M
Canadian Exports \$	0.00M	\$ 0.00M	\$ 0.00M	\$ 0.00M
Canadian Share of Import Market	28.00%	26.00%	0.00%	0.00%

## Major Competing Countries

## Market Share

i) 349 MEXICO	023 %
ii) 499 SPAIN	019 %
iii) 594 VENEZUELA	007 %
iv) 159 GREECE	006 %
v) 073 COLOMBIA	004 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 100 \$M AND UP

## Current status of Canadian exports:

Products/services for which there are  
good market prospects

## Current Total Imports

## In Canadian \$

i) PRECASE CONCRETE PANELS	\$ 0.00 M
ii) CLADDING-METAL SIDING	\$ 0.00 M
iii) STEEL FOOTING & DECKINGS	\$ 0.00 M
iv) GLASS - SKYLITE - SP. METALLIC COATED	\$ 0.00 M
v) FIXTURES.	\$ 0.00 M

Projects or portion of projects which are still in the planning  
stage and for which Canadian companies might have reasonable prospects.

i) Project Name: MAJOR CONSTRUCTION PROJECT DEVELOPMENT  
IN CITY OF WARREN, MI

Approximate Value: \$ 400000 M

Financing Source: 012 DOM

For further info. please contact:

PETER WRIGHT (313) 567-2340

## Export and Investment Promotion Planning System

MISSION: 605 DETROIT

COUNTRY: 577 UNITED STATES OF AMERICA

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

ii) Project Name: NEW BRIDGES - COMPLETION OF  
ZILWAUKEE BRIDGE.

Approximate Value: \$ M

Financing Source:

For further info. please contact:

iii) Project Name: REPLACEMENT OF EXISTING BRIDGES AND  
HIGHWAY INTERCHANGES

Approximate Value: \$ M

Financing Source:

For further info. please contact:

iv) Project Name: MAJOR EXPANSION OF METRO AIRPORT(.5 B \$)  
& DETROIT CITY AIRPORT (\$50 MILLION)

Approximate Value: \$ M

Financing Source:

For further info. please contact:

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- other factor(s) described by the Trade Office as follows:  
SURCHARGE IS PROVING MORE AN IRRITANT THAN A BARRIER. EXPORT TRADE, HOWEVER, WILL BE EXHANCED BY AN ACCEPTABLE RESOLUTION OF THIS PROBLEM.

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada
- the availability of competitive Canadian financing

## Export and Investment Promotion Planning System

MISSION: 605 DETROIT

COUNTRY: 577 UNITED STATES OF AMERICA

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: ACTIVE CANVAS OF BUILDING SUPPLY WHOLESALERS & DISTRIBUTORS TO CONSTRUCTION INDUSTRY.

Results Expected: ESTABLISHED INVENTORY OF CANADIAN PRODUCTS TO SERVICE INDUSTRY TRADE.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: VISIT TO MICHIGAN STATE UNIVERSITY ENGINEERING DEPARTMENT TO ASSESS NEW DEVELOPMENTS ON APPLICATIONS OF CEMENT COMPOSITES.

Results Expected: MARKET POSSIBILITIES FOR NEW CEMENT MATRIX (COMPOSITES)

Activity: PURSUE REPRESENTATION FOR CANADIAN PRODUCTS ON INDIVIDUAL BASIS WITH MANUFACTURERS REPS.

Results Expected: LOOK TO ESTABLISH 2 NEW WHOLESALE DISTRIBUTORS AND 4 MANUFACTURERS' REP APPOINTMENTS.

Activity: SOCIAL-BUSINESS MEETINGS WITH SALES AND DISTRIBUTORS AND MAJOR CONTRACTORS IN TERRITORY.

Results Expected: LOOK TO SUSTAIN VOLUME OF BUSINESS INFLUENCED AND POSSIBLE \$1/4 MILLION INCREASE IN EXPORT BUSINESS.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 605 DETROIT

Market: 577 UNITED STATES OF AMERICA

Sector: 016 INDUSTRIAL MACHIN. PLANTS, SERV.

Subsector: 161 MANUFACT &amp; MATERIAL PLANT, EQP.

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	6.10M	\$ 4.30M	\$ 0.00M	\$ 0.00M
Canadian Exports \$	1.40M	\$ 1.38M	\$ 0.00M	\$ 0.00M
Canadian Share of Import Market	7.80%	13.00%	0.00%	0.00%

## Major Competing Countries

## Market Share

i) 265 JAPAN	050 %
ii) 128 GERMANY WEST	021 %
iii) 237 ITALY	012 %
iv) 354 NETHERLANDS	002 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector:

100 \$M AND UP

## Current status of Canadian exports:

Products/services for which there are  
good market prospects

## Current Total Imports

i) MACHINE TOOLS	\$ 155.00 M
ii) MATERIALS HANDLING	\$ 25.00 M

Projects or portion of projects which are still in the planning  
stage and for which Canadian companies might have reasonable prospects.i) Project Name: JEFFERSON AVENUE CHRYSLER PLANT  
DETROIT, MI

Approximate Value: \$ M

Financing Source:

For further info. please contact:

PETER WRIGHT (313)567-2340

ii) Project Name: MAZDA FORD PLANT FLAT ROCK, MI

Approximate Value: \$ M

Financing Source:

For further info. please contact:

PETER WRIGHT (313) 567-2340

## Export and Investment Promotion Planning System

MISSION: 605 DETROIT

COUNTRY: 577 UNITED STATES OF AMERICA

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

iii) Project Name: DETROIT CITY INDICATOR  
DETROIT, MI

Approximate Value: \$ M

Financing Source:

For further info. please contact:  
PETER WRIGHT (313)567-2340

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- the unsuitability of Canadian products for this market

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: CANVAS OF AUTOMOTIVE PLANT PURCHASING SECTOR FOR REQUESTS FOR QUOTATIONS ON PLANT MACHINERY.

Results Expected: NOTICE OF NEW REQUESTS AND REQUIREMENTS FOR MAJOR EXPANSION PROJECT.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: MAINTAIN CONSTANT CONTACTS WITH PURCHASING SECTOR IN AUTOMOTIVE, PULP AND PAPER, CHEMICAL, HI-TECH-FOR NOTICE OF NEW EQUIPMENT REQUIREMENTS.

Results Expected: APPOINTMENT OF 2 NEW MANUFACTURERS' REPS IN PULP AND PAPER SECTOR AND OPPORTUNITY TO QUOTE ON NEW MACHINERY AND EQUIPMENT REQUIREMENTS FOR THIS SECTOR.



Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 605 DETROIT

Country: 577 UNITED STATES OF AMERICA

## Highlights of Investment Environment

Estimated Value Of Equity Investment  
In Canada From This Post Territory:

\$ 23 300.00 M

Estimated Value Of Annual Direct Equity  
Investments To All Destinations From  
This Post Territory:

\$ 4 600.00 M

Country Destinations Of Direct  
Equity Investment From Post  
TerritoryEstm. Value  
\$ CDN% Of Annual Direct Equity  
Investment Outflows By  
Category Of Investors

1. 265 JAPAN	\$ 0.00 M	1. Corporations : 65.00 %
2. 075 CANADA	\$ 0.00 M	2. Institutional : 30.00 %
3. 434 TAIWAN	\$ 0.00 M	3. Entrepreneurs : 20.00 %
4. 128 GERMANY WEST	\$ 1 700.00 M	4. Immigrant Entr.: 12.00 %

The Mission Has Reported Factors That Tend To Change  
Outward Flows Of Investment From The Post Territory Including:

- Corporate Search For Cheaper Production And/Or Operating Costs Outside The Country
- Corporate Expansion To Seek New Markets
- Corporate Expansion To Serve Better Existing Markets
- Large Capital Pools Seeking Investment Outlets Abroad (e.g. Oil States)

The Mission Reports That Investors From The Post Territory Who Invest Abroad  
In Manufacturing Tend To Invest In The Following Sector(s) Subsector(s)

## -SECTOR(S)-

1. 008 TRANSPORT SYS, EQUIP, COMP, SERV.
2. 016 INDUSTRIAL MACHIN, PLANTS, SERV.
3. 005 COMM. & INFORM. EQP. & SERV
4. 005 COMM. & INFORM. EQP. & SERV

## -SUBSECTOR(S)-

- 081 AUTOMOTIVE
- 163 TOOLS & HARDWARE
- 056 ELECTRONIC COMPONENTS
- 052 WORKPLACE AUTOMATION

DATE: 88/01/25

DEPARTMENT OF EXTERNAL AFFAIRS

PAGE: 161b

Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 605 DETROIT

Country: 577 UNITED STATES OF AMERICA

#### Equity Propensity Of Key Sources Of Investment From This Territory

Corporations : Start-up Investment To Create New Enterprise (On A Joint Basis)  
Institutional :  
Entrepreneurs : Start-up Investment To Create New Enterprise (On A Joint Basis)  
Immigrant Entr.:

#### Sector Preferences By Type Of Key Investors

Corporations : Portfolio Investment  
Institutional : Portfolio Investment  
Entrepreneurs : Portfolio Investment  
Immigrant Entr.:

#### Investment Promotion Priority Sectors Sub-Sectors Program Plans And Anticipated Results.

Sector : 016 INDUSTRIAL MACHIN, PLANTS, SERV.  
Subsector: 161 MANUFACT & MATERIAL PLANT, EQP.

#### Reason(s):

GREATER AWARENESS OF CDN INDUSTRIAL EQUIP. & PROD. CAPABILITY TOGETHER WITH CDN DOLLAR ADVANTAGE, OFFERS NEW OPPORTUNITY IN U. S. MKT. PROVEN SUPERIORITY OF MAT. HANDLING CONVEYOR SYST. SHOULD ENABLE CDN MANUF. TO

#### Program Plans:

EXPOSURE TO AUTOMOTIVE SECTOR I.E. INVESTMENT SEMINAR IN REGION (DETROIT, INDIANAPOLIS).

Anticipated Results: NEW INVESTMENT ESTABLISHED IN CANADA (IDENTIFY 2ND TIER SUPPLIERS).

Sector : 008 TRANSPORT SYS, EQUIP, COMP, SERV.  
Subsector: 081 AUTOMOTIVE

#### Reason(s):

DETROIT REMAINS THE CENTRE OF THE AUTOMOTIVE IND. IN NORTH AMERICA AND DETROIT INDUSTRIALISTS HAVE AN INTIMATE KNOWLEDGE OF THE CDN AUTO IND. & ARE ALERT TO TAKE ADVANT. OF NEW OPPORT. ON EITHER SIDE OF THE BORDER.

DATE: 88/01/25

DEPARTMENT OF EXTERNAL AFFAIRS

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Report: B4 88/B9 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 605 DETROIT

Country: 577 UNITED STATES OF AMERICA

Investment Promotion Priority Sectors Sub-Sectors  
Program Plans And Anticipated Results.

Sector : 008 TRANSPORT SYS, EQUIP, COMP, SERV.  
Subsector: 081 AUTOMOTIVE

Program Plans:

CONDUCT INTERVIEWS WITH SENIOR EXECUTIVES OF AUTO INDUSTRY (BOTH PARTS MANUFACTURERS & ASSEMBLERS) TO SOLICIT THEIR VIEWS & COMMENTS RE TRADE POLICIES, POTENTIAL IRRITANTS, ETC.

Anticipated Results: DOCUMENTED REPORTS TO BE FORWARDED TO OTTAWA REGARDING REACTION FROM INDUSTRY TOWARDS CANADA.

Sector : 005 COMM. & INFORM. EQP. & SERV  
Subsector: 056 ELECTRONIC COMPONENTS

Reason(s):

THE AUTOMOTIVE ELECTRONICS & COMPONENTRY MARKET IS FORECAST TO INCREASE BY MORE THAN 300% BETWEEN 1987 & 1997. MICHIGAN IS AMONGST THE 3 FASTEST GROWING ELECTRONICS INDUSTRY AREAS IN THE U. S. A.

Program Plans:

ENCOURAGE POTENTIAL JOINT VENTURES IN CONJUNCTION WITH CANADIAN FORCES TANK ACQUISITION PLANS AND IN DEVELOPMENT OF ARMORED FAMILY OF VEHICLES FOR USA ARMY.

Anticipated Results: IDENTIFICATION OF SEVERAL POTENTIAL JOINT VENTURE ARRANGEMENTS.

Sector : 005 COMM. & INFORM. EQP. & SERV  
Subsector: 052 WORKPLACE AUTOMATION

Reason(s):

THE DETROIT-ANN ARBOR CORRIDOR IS CHARACTERIZED BY FAST GROWING EXPERTISE IN THE FIELD OF COMPUTER INTEGRATED MFG. SINCE CIM IS BECOMING A MAJOR ELEMENT IN WORLD-WIDE MFG COMPETITIVENESS, CDN REQUIREMENTS FOR

DATE: 88/01/25

DEPARTMENT OF EXTERNAL AFFAIRS

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 605 DETROIT

Country: 577 UNITED STATES OF AMERICA

Investment Promotion Priority Sectors Sub-Sectors  
Program Plans And Anticipated Results.

Sector : 005 COMM. & INFORM. EQP. & SERV  
Subsector: 052 WORKPLACE AUTOMATION

Program Plans:

PARTICIPATE IN FOUR DETROIT BASED TRADE SHOWS BY SETTING UP INFORMATION BOOTH IN CONJUNCTION WITH INVESTMENT CANADA PERSONNEL.

Anticipated Results: IDENTIFY POTENTIAL PROSPECTS & INCREASE AWARENESS OF NEW DEVELOPMENTS IN AUTO INDUSTRY IN CANADA.

Sector : 004 DEFENCE PROGRAMS, PRODUCTS, SERV  
Subsector: 042 ARMAMENTS & VEHICLES

Reason(s):

METRO DETROIT IS HEADQUARTERS FOR THE ONLY MAIN BATTLE TANK MANUFACTURER IN THE USA & THE FOCAL POINT FOR OTHER MFR OF ARMORED COMBAT VEHICLES & TACTICAL VEHICLES. THE M1 ABRAMS TANK IS A PRIME CANDIDATE IN

Program Plans:

MAILING CAMPAIGN DIRECTED AT THE COMPUTER AND ELECTRONICS INDUSTRY IN TERRITORY.

Anticipated Results: IDENTIFY DIRECT INVESTMENT AND POTENTIAL JOINT VENTURE PARTNERS.

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DEPARTMENT OF EXTERNAL AFFAIRS

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 605 DETROIT

Country: 577 UNITED STATES OF AMERICA

#### Other Investment Program Plans

**Activity(ies):**

CONSULTANT'S STUDY AS TO HOW TO EXPAND INVESTMENT IN CANADA OF CROSS-BORDER INVESTMENT FUND FLOW FROM FINANCIAL INSTITUTIONS IN TERRITORY.

**Anticipated Results:** DEVELOPMENT OF AN INVESTMENT DEVELOPMENT PROGRAM SPECIFICALLY AIMED AT FINANCIAL INSTITUTIONS IN TERRITORY.

**Activity(ies):**

MAINTAIN REGULAR CONTACT WITH LAYERS, ACCOUNTANTS, BROKERS, PORTFOLIO MANAGERS IN ORDER TO KEEP THEM APPRISED OF CHANGES IN INVESTMENT POLICY.

**Anticipated Results:** ENHANCED AWARENESS OF CANADA'S INVESTMENT CLIMATE & OPPORTUNITIES AVAILABLE TO THEIR OWN CLIENTS.

**Activity(ies):**

CONDUCT SERIES OF INTERVIEWS BETWEEN CORP. SENIOR EXEC. IN TERRITORY AND HOM/STC TO EXCH. VIEWS RELATING TO TRADE PROM. INDUSTRIAL DEVELOP., BUSINESS STRATEGY, EXPORT ACTIVITIES & OTHER PERTINENT ISSUES.

**Anticipated Results:** GATHER MKT INTELLIGENCE WHICH WILL BE FORWARDED TO OTT. & OTHERS AS USEFUL BACKGROUND INFO. IN FORMULATING APPROPRIATE POLICY TO PROMOTE CDN INTEREST.

DATE: 88/01/25

DEPARTMENT OF EXTERNAL AFFAIRS

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 605 DETROIT

Country: 577 UNITED STATES OF AMERICA

Investment Promotion Activities Proposals

Type Of Event: 050 SEMINARS

Description: SEMINAR - MARKETING & INVESTING IN CANADA

Priority: 4 Date: 10/88

Sector: 005 COMM. & INFORM. EQP. & SERV

Sub-Sector:

Location: GRAND RAPIDS

Description: REGIONAL SEMINAR

Priority: 2 Date: 10/88

Sector: 999 MULTIPLE SECTORS

Sub-Sector: 999 ALL SUB-SECTORS

Location: INDIANAPOLIS

Description: REGIONAL SEMINAR

Priority: 1 Date: 06/88

Sector: 999 MULTIPLE SECTORS

Sub-Sector:

Location: DETROIT

Type Of Event: 070 OTHER PROMOTIONAL EVENTS

Description: INFO BOOTH AT ADVANCED COMPOSITES CONFERENCE

Priority: 9 Date: 11/89

Sector: 012 PETROCHEM & CHEM PROD, EQP, SERV

Sub-Sector:

Location: DEARBORN, MI

Description: INFO BOOTH (MICHIGAN TRUCK SHOW)

Priority: 3 Date: 10/88

Sector: 008 TRANSPORT SYS, EQUIP, COMP, SERV.

Sub-Sector:

Location: DETROIT

## Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 605 DETROIT		
Sector: 001 AGRI & FOOD PRODUCTS & SERVICE		
010 FAIRS		
SOLO FOOD FAIR	DETROIT, MICHIGAN	0589
SOLO FOOD FAIR	DETROIT, MICHIGAN	0590
ILLINOIS/INDIANA FARM EQUIPMENT SHOW	INDIANAPOLIS, INDIANA	1289
020 MISSION OUTGOING		
P. R. O. F. I. T.	MICHIGAN	1189
P. R. O. F. I. T. MISSION	MICHIGAN	0690
P. R. O. F. I. T. MISSION	MICHIGAN	0689
P. R. O. F. I. T. MISSION	MICHIGAN	1190
024 MISSION INCOMING		
MISS. FM MI., IND., TOLEDO, OHIO TO WEST. FARM PROGRESS	REGINA, SASK.	0690
MISS. FM MI., INDIANA, TOLEDO, OHIO TO WEST. FARM. PROG.	REGINA, SASK.	0689
Sector: 002 FISHERIES, SEA PRODUCTS & SERV.		
020 MISSION OUTGOING		
OUTGOING SEAFOOD PRODUCTS MISSION	GRAND RAPIDS, MICH.	0491
Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV		
020 MISSION OUTGOING		
DEFENCE PRODUCTS SEMINAR	INDIANA & MICHIGAN	0990
DEFENCE PRODUCTS SEMINAR	INDIANA & MICHIGAN	0989
024 MISSION INCOMING		
INCOMING DEFENCE PRODUCTS MISSION	ONTARIO/QUEBEC	0590
INCOMING DEFENCE PRODUCTS MISSION	ONTARIO/QUEBEC	0589
Sector: 005 COMM. & INFORM. EQP. & SERV		
010 FAIRS		
CONSTRUCTECH '89	DETROIT, MICHIGAN	1089
AUTOFACT '90	DETROIT, MICHIGAN	1190
ROBOT 13/VISION 90	DETROIT, MICHIGAN	0690
Sector: 008 TRANSPORT SYS, EQUIP, COMP, SERV.		
010 FAIRS		
SAE CONFERENCE & EXPO	DETROIT, MICHIGAN	0290
SAE CONFERENCE & EXPO	DETROIT, MICHIGAN	0291
MICHIGAN TRUCK SHOW	DETROIT, MICHIGAN	1090
020 MISSION OUTGOING		
SAE CONFERENCE & EXPO	DETROIT, MICHIGAN	0290

## Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 605 DETROIT		
Sector: 008 TRANSPORT SYS, EQUIP, COMP, SERV.		
020 MISSION OUTGOING SAE CONFERENCE RECEPTION	DETROIT, MICHIGAN	0291
024 MISSION INCOMING INC. MISS. FM MI., IN., TOLEDO, OHIO TO INT'L BOAT SHOW	TORONTO	0191
INC. MISS. FM MI., INDIANA, TOLEDO, OHIO TO BOAT SHOW	TORONTO	0190
Sector: 009 FOREST PRODUCTS, EQUIP, SERVICES		
010 FAIRS ANNUAL MICH. LUMBER & BUILDING MAT. ASOC. EXPO.	MICHIGAN	0190
LOGGING CONGRESS, MARQUETTE MICHIGAN	MARQUETTE, MICHIGAN	0989
020 MISSION OUTGOING LUMBER SEMINAR	MICHIGAN	0989
LUMBER SEMINAR	MICHIGAN	0990
Sector: 012 PETROCHEM & CHEM PROD, EQP, SERV		
010 FAIRS ADVANCED COMPOSITES CONF.	DEARBORN, MICHIGAN	1189
Sector: 013 CONSUMER PRODUCTS		
010 FAIRS AUTOFACT '89	DETROIT, MICHIGAN	1189
CONTRACT FURNITURE SHOW	DETROIT, MICHIGAN	1089
020 MISSION OUTGOING OUTGOING APPAREL MANUFACTURERS MISSION	DETROIT, MICHIGAN	0889
OUTGOING RESIDENTIAL FURNITURE MANUFACTURING MISS.	TROY, MICHIGAN	0890
024 MISSION INCOMING INC. MISS. FROM MI., INDIANA, TOLEDO, OHIO TO IIDEX '90	TORONTO	1190
INC. MISS. FM MI., IN., TOLEDO, OHIO TO CDN FESTIV. FASH	TORONTO	0391
INC. MISS. FM MI., IN., TOLIDO, OHIO TO FURNITURE MART	TORONTO	0191
INC. MISS. FM MI., IN., TOLEDO, OHIO TO IIDEX '91	TORONTO	1191
INC. MISS. FM MI., IN., TOLEDO, OHIO TO FURNITURE MART	MONTREAL	0691
INC. MISS. FM MI. INDIANA & TOLEDO, OHIO TO CDN FUR	MONTREAL	0589
INC. MISS. FM MI., INDIANA, TOLEDO, OHIO TO SPORT. GOODS	MONTREAL	0290
INC. MICC. FM MI., INDIANA, TOLEDO, OHIO TO FURNIT. SHOW	TORONTO	0190
INC. MISS. FM MI., IN., TOLEDO, OHIO TO FURNITURE MART	MONTREAL	0690
BUYERS MISS. FM MICH. & INDIANA TO APPAREL MANUFACT.	ONTARIO/QUEBEC	0690
MISS. FM MI., IND., TOLEDO, OHIO TO CDN INT'L FUR FAIR	MONTREAL	0590



## Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 605 DETROIT		
Sector: 013 CONSUMER PRODUCTS		
024 MISSION INCOMING INC. MISS. FM MI., IN., TOLEDO, OHIO TO FESTIV. OF FASH.	TORONTO	0390
Sector: 015 CONSTRUCTION INDUSTRY		
024 MISSION INCOMING MISS. FM MI., IN., & TOLEDO, OHIO TO ASHRAE	DALLAS, TEXAS	0290
Sector: 999 MULTIPLE SECTORS		
020 MISSION OUTGOING		
NEBS MISSION	DETROIT	0489
NEBS MISSION	DETROIT, MICHIGAN	0990
NEBS MISSION	DETROIT, MICHIGAN	0590
REP LOCATOR PROGRAM	TOLEDO, OHIO	1189
NEBS MISSION	DETROIT, MICHIGAN	1089

## Export and Investment Promotion Planning System

## 88/89 Trade and Economic Overview

Mission: 606 LOS ANGELES

Country: 577 UNITED STATES OF AMERICA

LOS ANGELES & SOUTHERN CALIFORNIA HAVE CONTINUED THEIR RAPID GROWTH TOWARDS BECOMING THE PRE-EMINENT FINANCIAL & INDUSTRIAL LOCALES WEST OF MANHATTAN & ARE RAPIDLY CHALLENGING NEW YORK AS A CENTER OF AMERICAN INFLUENCE. LOS ANGELES WHICH HAS LONG BEEN ASSOCIATED AS A SHOW BUSINESS TOWN HAS SHAKEN THIS SOMETIMES PREJUDICATIVE IMAGE IN DEED IF NOT IN PERCEPTION. WITH OVER 190 INTERNATIONAL BANKS LA IS THE AMERICAN WINDOW ON THE RAPIDLY EMERGING PACIFIC FINANCIAL MARKETS & IT NOW BOASTS MORE MANUFACTURING OUTPUT & JOBS THAN NEW YORK & CHICAGO COMBINED. THE SHIFT OF HIGH TECHNOLOGY SOUTHWARD FROM THE SILICON VALLEY WILL CERTAINLY ADVANCE SOUTHERN CALIFORNIA'S PURSUIT OF ITS PLACE ON THE WORLD'S SHORT LIST OF ECONOMIC CAPITALS. AT THE SAME TIME ARIZONA CONTINUES ITS "SUN BELT" GROWTH & IS UNDERGOING A RADICAL CHANGE FROM BEING A WINTER VACATION/RETIREMENT PLACE TO BEING A MAJOR HIGH TECH & INDUSTRIAL STATE. ECONOMIC PROSPECTS THROUGHOUT THE REGION ARE UNDOUBTEDLY TIED TO THE HEALTH OF THE BROADER AMERICAN ECONOMY. HOWEVER, THE SOUTHERN CALIFORNIA ECONOMY, OF ITS OWN LARGER THAN CDA'S HAS A CAPACITY TO RESPOND MORE QUICKLY TO DEVELOPMENTS AS BUSINESS ENTERPRISES ARE OF A MORE SCALE (ON AN INDIVIDUAL BASIS). WITH THE POTENTIAL OF LOWER JAPANESE SALES INTO THE USA AS A RESULT OF DEVALUATION AND STIFFER AMERICAN RESISTANCE TO JAPANESE COMPETITION WILL ASSIST CALIFORNIANS IN ADJUSTING TO & PROFITING FROM CHANGED COMMERCIAL REALITIES.

## Export and Investment Promotion Planning System

REPT: SYN-GEO 88/89 A. Post export program priorities

Region: UNITED STATES

Mission: 606 LOS ANGELES

Market: 577 UNITED STATES OF AMERICA

The Mission selected the following sectors as priority areas for export promotion activities for the coming fiscal year:

1. 008 TRANSPORT SYS, EQUIP, COMP, SERV.  
REASONS: CONSTRUCTION OF MAJOR URBAN TRANSIT SYSTEMS. SOME 8 MILLION REGISTERED MOTOR VEHICLES.
2. 008 TRANSPORT SYS, EQUIP, COMP, SERV.  
REASONS: CONTINUED USA DEFENSE EXPENDITURES FOR THE C-17 PROGRAM, THE ADVANCED TACTICAL FIGHTER, & NASA'S AEROSPACE PLANE, PLUS THE MS-11 PROGRAM OFFER EXCEPTIONAL OPPORTUNITIES.
3. 013 CONSUMER PRODUCTS  
REASONS: WITH LARGE, AFFLUENT POPULATION, DEMAND FOR APPAREL PRODUCTS IS VIRTUALLY WITHOUT LIMIT.
4. 005 COMM. & INFORM. EQP. & SERV  
REASONS: AS A CENTRE FOR HIGH TECHNOLOGY, & VERY HIGH RECEPTIVENESS FOR THE PC REVOLUTION, S. CALIFORNIA IS MAJOR TARGET FOR BOTH LOCAL SALES, & INCREASINGLY NATIONAL SALES.

The most important current Canadian export sectors to this market are (based on actual export sales):

1. 004 DEFENCE PROGRAMS, PRODUCTS, SERV
2. 002 FISHERIES, SEA PRODUCTS & SERV.
3. 009 FOREST PRODUCTS, EQUIP, SERVICES
4. 007 POWER & ENERGY EQUIP. & SERV.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 606 LOS ANGELES

Market: 577 UNITED STATES OF AMERICA

Sector: 001 AGRI &amp; FOOD PRODUCTS &amp; SERVICE

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import)	\$ 20720.00M	\$20700.00M	\$20620.00M	\$18380.00M
Canadian Exports	\$ 229.00M	\$ 225.00M	\$ 218.00M	\$ 204.00M
Canadian Share of Import Market	0.01%	0.01%	0.01%	0.01%

## Major Competing Countries

## Market Share

i) 620 EUROPE	050 %
ii) 011 AUSTRALIA	010 %
iii) 370 NEW ZEALAND	010 %
iv) 605 ASIA OR FAR EAST	005 %
v) 614 SOUTH AMERICA	005 %
vi) 616 OTHER COUNTRIES	030 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Small but expanding

Products/services for which there are  
good market prospects

Current Total Imports  
In Canadian \$  
\$ 0.00 M

i) ALL FOOD PRODUCTS

The Trade Office reports that the following factors influence Canadian  
export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector  
(sub-sector) in this market is lower than optimum mainly because of:

- market prospect which are relatively new and have not yet been  
explored adequately by Canadian exporters

## Export and Investment Promotion Planning System

MISSION: 606 LOS ANGELES

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada
- the availability of competitive Canadian financing

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 606 LOS ANGELES

Market: 577 UNITED STATES OF AMERICA

Sector: 002 FISHERIES, SEA PRODUCTS &amp; SERV.

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1431.00M	\$ 1337.00M	\$ 1534.00M	\$ 1305.00M
Canadian Exports \$	40.00M	\$ 38.00M	\$ 41.00M	\$ 37.20M
Canadian Share of Import Market	0.00%	0.00%	0.00%	0.00%

## Major Competing Countries

	Market Share
i) 349 MEXICO	033 %
ii) 614 SOUTH AMERICA	033 %
iii) 410 NORWAY	027 %
iv) 093 DENMARK	027 %
v) 011 AUSTRALIA	015 %
vi) 370 NEW ZEALAND	015 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 30-60 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) ALL SEAFOOD	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

Export and Investment Promotion Planning System

MISSION: 606 LOS ANGELES

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada
- the availability of competitive Canadian financing

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 606 LOS ANGELES

Market: 577 UNITED STATES OF AMERICA

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Subsector: 041 AEROSPACE &amp; MARINE

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1000.00M	\$ 1000.00M	\$ 1000.00M	\$ 1000.00M
Canadian Exports \$	500.00M	\$ 400.00M	\$ 360.00M	\$ 400.00M
Canadian Share of Import Market	50.00%	40.00%	36.00%	40.00%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	080 %
ii) 237 ITALY	006 %
iii) 507 SWEDEN	002 %
iv) 265 JAPAN	002 %
v) 268 KOREA	001 %
vi) 011 AUSTRALIA	001 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) FUSELAGE	\$ 0.00 M
ii) MAIN WINGS	\$ 0.00 M
iii) AILERONS	\$ 0.00 M
iv) LANDING GEARS	\$ 0.00 M
v) SPARS	\$ 0.00 M
vi) PRECISION PARTS	\$ 0.00 M
vii) N.B. COMPOSITE TECHNOLOGY IS THE NEW, LEADING EDGE	\$ 0.00 M
viii) FOR COMMERCIAL/MILITARY AIRCRAFTS PARTS.	\$ 0.00 M

Projects or portion of projects which are still in the planning  
stage and for which Canadian companies might have reasonable prospects.

i) Project Name: ADVANCE TACTICAL FIGHTER  
Approximate Value: \$ 50000 M  
Financing Source: 025 OTHER  
For further info. please contact:  
TDU



## Export and Investment Promotion Planning System

MISSION: 606 LOS ANGELES

COUNTRY: 577 UNITED STATES OF AMERICA

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

ii) Project Name: USAF C-17 CARGO  
 Approximate Value: \$ 45,000 M  
 Financing Source: 025 OTHER  
 For further info. please contact:  
 TDU

iii) Project Name: MD-11 COMMERCIAL AIRLINES  
 Approximate Value: \$ 15000 M  
 Financing Source: 025 OTHER  
 For further info. please contact:  
 TDU

iv) Project Name: NASA AEROSPACE PLANE  
 Approximate Value: \$ 3000 M  
 Financing Source: 025 OTHER  
 For further info. please contact:  
 TDU

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- other factor(s) described by the Trade Office as follows:  
 MAIN AIRFRAME SUPPLIERS ARE CANADAIR, FLEET, CAP AND DOUGLAS OF CANADA. BRISTOL HAS POTENTIAL. MONASCO AND DOWTY PRODUCE LANDING GEARS.

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada
- the existence of a bilateral economic/trade arrangement between Canada and this country

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: DIRECT MAIL PROGRAM TO MAJOR U. S. PLAYERS

Results Expected: INCREASE U. S. AWARENESS OF CANADIAN SUPLIERS

Export and Investment Promotion Planning System

MISSION: 606 LOS ANGELES

COUNTRY: 577 UNITED STATES OF AMERICA

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: UPDATE OVERVIEW REPORT OF U.S. DEFENCE CONTACTS AND MAIL TO CANADIAN EXPORTERS.

Results Expected: INCREASE CDN AWARENESS OF U.S. CONTACTS.

Activity: COLLECT AND MAINTAIN A SUPPLY OF CANADIAN COMPANY BROCHURES.

Results Expected:

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: INCREASE NUMBER OF LOCAL REPS OF CANADIAN FIRMS

Results Expected: TARGET - INCREASE NUMBER OF LOCAL REPS OF CANADIAN AEROSPACE FIRMS BY 2 OR 3.

Activity: SERIES OF U.S. INDUSTRY VISITS BY OFFICE TO UNCOVER BID OPPORTUNITIES.

Results Expected: TARGET- UNCOVER 2 TO 3 NEW U.S. FIRMS WITH AEROSPACE REQUIREMENTS.

Activity: ATTEND U.S. INDUSTRY 'VENDOR' DAYS AND SUPPLY RELEVANT LITERATURE.

Results Expected:

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 606 LOS ANGELES

Market: 577 UNITED STATES OF AMERICA

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Subsector: 043 ELECTRICAL &amp; ELECTRONIC

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1000.00M	\$ 1000.00M	\$ 1000.00M	\$ 1000.00M
Canadian Exports \$	275.00M	\$ 250.00M	\$ 200.00M	\$ 250.00M
Canadian Share of Import Market	27.50%	25.00%	20.00%	25.00%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	085 %
ii) 051 UNITED KINGDOM	004 %
iii) 128 GERMANY WEST	004 %
iv) 038 BELGIUM	002 %
v) 410 NORWAY	002 %
vi) 265 JAPAN	002 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) ELECTRO-OPTICS	\$ 0.00 M
ii) CABINETRY	\$ 0.00 M
iii) PCBS	\$ 0.00 M
iv) HYBRID CIRCUITS	\$ 0.00 M
v) TEST EQUIPMENT	\$ 0.00 M
vi) SUB-SYSTEMS	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian  
export performance in this market for this sector (sub-sector).

## Export and Investment Promotion Planning System

MISSION: 606 LOS ANGELES

COUNTRY: 577 UNITED STATES OF AMERICA

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- other factor(s) described by the Trade Office as follows:

CANADIAN COMPANIES ARE NOT TERRIBLY AGGRESSIVE IN THIS MARKET AND GENERALLY DO NOT FOLLOW-UP LEADS.

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada
- the existence of a bilateral economic/trade arrangement between Canada and this country

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: DIRECT MAIL PROGRAM TO MAJOR U. S. PLAYERS.

Results Expected: INCREASE US AWARENESS OF CANADIAN SUPPLIERS

Activity: UPDATE OVERVIEW REPORT OF US DEFENCE CONTACTS AND MAIL TO CANADIAN SUPPLIERS

Results Expected: INCREASE CANADIAN AWARENESS OF US CONTACTS.

Activity: COLLECT AND MAINTAIN A SUPPLY OF CANADIAN COMPANY BROCHURES.

Results Expected:

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: INCREASE NUMBER OF LOCAL REPS OF CANADIAN FIRMS.

Results Expected: TARGET - INCREASE NUMBER OF LOCAL REPS OF CANADIAN ELECTRONICS FIRMS BY 5-10

Export and Investment Promotion Planning System

MISSION: 606 LOS ANGELES

COUNTRY: 577 UNITED STATES OF AMERICA

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: SERIES OF US INDUSTRY VISITS BY OFFICE TO UNCOVER BID OPPORTUNITIES.

Results Expected: TARGET - UNCOVER 25 NEW US FIRMS WITH ELECTRONICS REQUIREMENTS.

Activity: ATTEND US INDUSTRY VENDOR DAYS AND SUPPLY RELEVANT LITERATURE.

Results Expected:

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 606 LOS ANGELES

Market: 577 UNITED STATES OF AMERICA

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	50.00M	\$ 50.00M	\$ 50.00M	\$ 50.00M
Canadian Exports \$	2.00M	\$ 0.00M	\$ 0.00M	\$ 0.00M
Canadian Share of Import Market	4.00%	0.00%	0.00%	0.00%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	098 %
ii) 051 UNITED KINGDOM	001 %
iii) 265 JAPAN	001 %
iv) 128 GERMANY WEST	001 %
v) 112 FRANCE	001 %
vi) 011 AUSTRALIA	001 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 3-5 \$M

Current status of Canadian exports: No Export results to date

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) SPACE RESEARCH	\$ 0.00 M
ii) MARITIME RESEARCH	\$ 0.00 M
iii) 1) AF SPACE DIVISION LA	\$ 0.00 M
iv) 2) NAVAL OCEAN SYSTEMS CENTER SAN DIEGO.	\$ 0.00 M

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

i) Project Name: SDI (STRATEGIC DEFENCE INITIATIVE)  
Approximate Value: \$ 3000 M  
Financing Source:  
For further info. please contact:  
TDU

ii) Project Name: ADI (AIR DEFENCE INITIATIVE)  
Approximate Value: \$ 2000 M  
Financing Source:  
For further info. please contact:  
TDU

## Export and Investment Promotion Planning System

MISSION: 606 LOS ANGELES

COUNTRY: 577 UNITED STATES OF AMERICA

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

- iii) Project Name: SBR (SPACE-BASED RADAR)
- Approximate Value: \$ 1000 M
- Financing Source:
- For further info. please contact:  
TDU

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- the apparent limited sectoral capability in Canada compared to other competing export countries

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- No factors reported by mission

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: FIRST USAF SPACE DIVISION WORKING GROUP DEC. 1 AND 2, 1987  
FOR SPACE SUBSYSTEMS IN ALBUQUERQUE.

Results Expected: TARGET - 1 OR 2 DEVELOPMENT PROJECTS.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: SET UP BRIEFING AT NAVAL OCEAN SYSTEMS CENTER (NOSC) IN SAN DIEGO  
ON DEVELOPMENT SHARING PROPOSALS.

Results Expected: TARGET - 1 OR 2 DEVELOPMENT PROJECTS.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 606 LOS ANGELES

Market: 577 UNITED STATES OF AMERICA

Sector: 005 COMM. &amp; INFORM. EQP. &amp; SERV

Subsector: 054 COMPUTERS, SOFTWARE &amp; SYSTEMS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	5200.00M	\$ 4500.00M	\$ 4000.00M	\$ 3800.00M
Canadian Exports \$	25.00M	\$ 20.00M	\$ 12.00M	\$ 10.00M
Canadian Share of Import Market	0.50%	0.40%	0.30%	0.30%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	070 %
ii) 265 JAPAN	010 %
iii) 268 KOREA	010 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 60-100 \$M

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects

## Current Total Imports

In Canadian \$

i) VERTICAL SOFTWARE	\$ 0.00 M
ii) PERIPHERALS	\$ 0.00 M
iii) ACCESSORIES	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- No factors reported by mission

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- No factors reported by mission



Export and Investment Promotion Planning System

MISSION: 606 LOS ANGELES

COUNTRY: 577 UNITED STATES OF AMERICA

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: MARKET REPORT ON VERTICAL SOFTWARE.

Results Expected:

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 606 LOS ANGELES

Market: 577 UNITED STATES OF AMERICA

Sector: 005 COMM. &amp; INFORM. EQP. &amp; SERV

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import)	\$ 12000.00M	\$10000.00M	\$ 9000.00M	\$ 7500.00M
Canadian Exports	\$ 20.00M	\$ 15.00M	\$ 10.00M	\$ 8.00M
Canadian Share of Import Market	0.20%	0.20%	0.20%	0.10%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	085 %
ii) 265 JAPAN	005 %
iii) 268 KOREA	005 %
iv) 349 MEXICO	003 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 60-100 \$M

## Current status of Canadian exports:

Products/services for which there are  
good market prospects

## Current Total Imports

In Canadian \$

i) CATV	\$ 0.00 M
ii) OFFICE AUTOMATION	\$ 0.00 M
iii) TELECOMMS	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian  
export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector  
(sub-sector) in this market is lower than optimum mainly because of:

]

Some Canadian exporters to this market in this sector(sub-sector)  
have enjoyed success previously as a result of a variety of  
factors which the trade office reports to include:

- No factors reported by mission

Export and Investment Promotion Planning System

MISSION: 606 LOS ANGELES

COUNTRY: 577 UNITED STATES OF AMERICA

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: REPORT ON OS/2 ADOPTION IN S. CALIFORNIA

Results Expected: INFORMATION ON OS/2 ADOPTION TO BETTER TARGET BUSINESS ACTIVITY.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 606 LOS ANGELES

Market: 577 UNITED STATES OF AMERICA

Sector: 006 ELECTRONICS EQUIP. &amp; SERV

Subsector: 062 INSTRUMENTATION

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	3100.00M	\$ 3000.00M	\$ 2800.00M	\$ 2500.00M
Canadian Exports \$	55.00M	\$ 50.00M	\$ 50.00M	\$ 40.00M
Canadian Share of Import Market	1.75%	1.70%	1.80%	1.60%

## Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	070 %
ii) 265 JAPAN	010 %
iii) 268 KOREA	008 %
iv) 434 TAIWAN	008 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) COMPONENTS	\$ 0.00 M
ii) MICROELECTRONICS	\$ 0.00 M
iii) INSTRUMENTS	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- No factors reported by mission

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- No factors reported by mission

Export and Investment Promotion Planning System

MISSION: 606 LOS ANGELES

COUNTRY: 577 UNITED STATES OF AMERICA

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: MARKET REVIEW OF COMPUTER SECTOR.

Results Expected: ENHANCED REFERENCE BASE.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: CONTINUED CLOSE COOPERATION WITH TIP PROGRAM.

Results Expected: EFFECTIVE EARLY WARNING ON INDUSTRY DEVELOPMENTS.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 606 LOS ANGELES

Market: 577 UNITED STATES OF AMERICA

Sector: 008 TRANSPORT SYS, EQUIP, COMP, SERV.

Subsector: 081 AUTOMOTIVE

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1.10M	\$ 1.00M	\$ 900.00M	\$ 800.00M
Canadian Exports \$	70.00M	\$ 60.00M	\$ 55.00M	\$ 50.00M
Canadian Share of Import Market	6.36%	6.00%	6.11%	6.25%

## Major Competing Countries

## Market Share

i) 265 JAPAN	028 %
ii) 268 KOREA	021 %
iii) 577 UNITED STATES OF AMERICA	014 %
iv) 434 TAIWAN	012 %
v) 128 GERMANY WEST	011 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) HARD PARTS	\$ 0.00 M
ii) ACCESSORIES	\$ 0.00 M
iii) SERVICE EQUIPMENT	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- difficulties in obtaining credit facilities in Canada
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

## Export and Investment Promotion Planning System

MISSION: 606 LOS ANGELES

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

- sourcing assistance from Canadian federal/provincial governments departments
- product/service information from Canadian companies

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 606 LOS ANGELES

Market: 577 UNITED STATES OF AMERICA

Sector: 008 TRANSPORT SYS, EQUIP, COMP, SERV.

Subsector: 082 URBAN TRANSIT

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	350.00M	\$ 300.00M	\$ 100.00M	\$ 100.00M
Canadian Exports \$	30.00M	\$ 6.00M	\$ 5.00M	\$ 6.00M
Canadian Share of Import Market	8.60%	2.00%	5.00%	6.00%

## Major Competing Countries

## Market Share

i) 265 JAPAN	071 %
ii) 128 GERMANY WEST	015 %
iii) 237 ITALY	004 %
iv) 112 FRANCE	004 %
v) 577 UNITED STATES OF AMERICA	005 %
vi) 268 KOREA	003 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) HEAVY RAIL VEHICLES	\$ 0.00 M
ii) LIGHT RAIL VEHICLES	\$ 0.00 M
iii) CONTROL SYSTEMS	\$ 0.00 M
iv) CONSULTING SERVICES	\$ 0.00 M
v) TRAINING PROGRAM	\$ 0.00 M

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

- i) Project Name: METRO RAIL SUBWAY  
Approximate Value: \$ 3.5 M  
Financing Source:  
For further info. please contact:  
POST



## Export and Investment Promotion Planning System

MISSION: 606 LOS ANGELES

COUNTRY: 577 UNITED STATES OF AMERICA

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

ii) Project Name: LOS ANGELES-LONG BEACH LIGHT RAIL  
Approximate Value: \$ 700 M  
Financing Source:  
For further info. please contact:  
POST

iii) Project Name: CENTURY LINE EXTENSION  
Approximate Value: \$ 300 M  
Financing Source:  
For further info. please contact:  
POST

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- there are import restrictions which can present significant problems

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- non competitive pricing
- non-tariff protectionist measures which are difficult to overcome
- other factor(s) described by the Trade Office as follows:  
REFERS TO H: U. S. - BUY AMERICA ACT.

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 606 LOS ANGELES

Market: 577 UNITED STATES OF AMERICA

Sector: 009 FOREST PRODUCTS, EQUIP, SERVICES

Subsector: 092 WOOD AND WOOD PRODUCTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	3.50M	\$ 3.30M	\$ 3.10M	\$ 2.80M
Canadian Exports \$	2.00M	\$ 1.90M	\$ 1.80M	\$ 1.70M
Canadian Share of Import Market	57.00%	58.00%	58.00%	61.00%

## Major Competing Countries

## Market Share

i) 192 PEOPLE'S REP OF CHINA	001 %
ii) 553 UNION OF SOVIET SOC REP	001 %
iii) 068 CHILE	001 %
iv) 175 HONDURAS	001 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

## Products/services for which there are good market prospects

## Current Total Imports

	In Canadian \$
i) SHINGLES/SHAKES	\$ 273.00 M
ii) TREATED WOOD PRODUCTS	\$ 240.00 M
iii) HARDWOOD LUMBER	\$ 150.00 M
iv) MILLWORK	\$ 107.00 M

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

i) Project Name: N  
Approximate Value: \$ M  
Financing Source:  
For further info. please contact:

## Export and Investment Promotion Planning System

MISSION: 606 LOS ANGELES

COUNTRY: 577 UNITED STATES OF AMERICA

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- non competitive pricing
- other factor(s) described by the Trade Office as follows:  
LUMBER EXPORTS TO THE U.S. ARE SUBJECT TO A 15% CDN EXPORT TAX F. O. B. MILL PRICE; SHAKES AND SHINGLES ARE SUBJECT TO 35% DUTY WHICH IS TO BE PHASE OUT OVER 5 YEARS.

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: RECONSIDER POSSIBILITY OF ESTABLISHING A WOODWORKING MACHINERY CONSORTIUM

Results Expected:

Activity: MONITOR INTRODUCTION OF WOOD SUBSTITUTE MATERIALS PARTICULARLY STEEL

Results Expected:

Activity: FOLLOW-UP ON POTENTIAL FORESTRY REQUIREMENTS IN ARIZONA.

Results Expected:

Export and Investment Promotion Planning System

MISSION: 606 LOS ANGELES

COUNTRY: 577 UNITED STATES OF AMERICA

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ASSIST WITH IMPLEMENTATION OF NEW \$21 MILLION FEDERAL MARKET PROGRAM OR CEDAR SHAKES AND SHINGLES.

Results Expected:

Activity: IDENTIFY SCOPE FOR INTRODUCTION OF MORE MANUFACTURED WOOD PRODUCTS.

Results Expected:

Activity: UNDERTAKE RESEARCH TOWARDS INTRODUCTION OF A PINE SHAKE.

Results Expected:

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 606 LOS ANGELES

Market: 577 UNITED STATES OF AMERICA

Sector: 011 OIL &amp; GAS EQUIPMENT, SERVICES

Subsector: 116 MACHINERY AND EQUIPMENT

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	50.00M	\$ 48.00M	\$ 75.00M	\$ 80.00M
Canadian Exports \$	7.00M	\$ 6.00M	\$ 12.00M	\$ 15.00M
Canadian Share of Import Market	14.00%	12.50%	16.00%	18.75%

## Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	060 %
ii) 268 KOREA	011 %
iii) 128 GERMANY WEST	010 %
iv) 265 JAPAN	005 %
v) 051 UNITED KINGDOM	002 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 15-30 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) INSTRUMENTATION	\$ 0.00 M
ii) FILTERS, PURIFYING PARTS	\$ 0.00 M
iii) DRILL SITS	\$ 0.00 M
iv) DRILLING, BORING EQUIPMENT	\$ 0.00 M
v) SOFTWARE (DATA COLLECTION)	\$ 0.00 M

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

- i) Project Name: OFFSHORE OIL DEVELOPMENTS IN SANTA BARBARA CHANNEL, ON HOLD FOR TIME  
Approximate Value: \$ 500 M  
Financing Source: 025 OTHER  
For further info. please contact:

## Export and Investment Promotion Planning System

MISSION: 606 LOS ANGELES

COUNTRY: 577 UNITED STATES OF AMERICA

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

- ii) Project Name: BEING DUE TO ENVIRONMENTAL RESTRICTIONS  
Approximate Value: \$            M  
Financing Source:  
For further info. please contact:

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters
- other factor(s) described by the Trade Office as follows:  
    GENERALLY LOW VOLUME OF ACTIVITIES IN DRILLING SECTOR.

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- use of Canadian Government export promotion activities
- strong sectoral capability in Canada

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 606 LOS ANGELES

Market: 577 UNITED STATES OF AMERICA

Sector: 013 CONSUMER PRODUCTS

Subsector: 113 PETROLEUM AND PRODUCTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	262.49M	\$ 238.60M	\$ 216.94M	\$ 197.22M
Canadian Exports \$	6.30M	\$ 6.10M	\$ 5.80M	\$ 5.50M
Canadian Share of Import Market	2.40%	2.52%	2.64%	2.77%

## Major Competing Countries

Market Share

i) 051 UNITED KINGDOM	033 %
ii) 512 SWITZERLAND	022 %
iii) 112 FRANCE	014 %
iv) 128 GERMANY WEST	006 %
v) 265 JAPAN	004 %
vi) 237 ITALY	004 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) PAINTINGS, PASTEL DRAWING, ETC., BY HAND	\$ 4.20 M
ii) ENGRAVINGS, ETCHINGS, PRINTS, ETC., UNBOUND	\$ 0.30 M
iii) SCULPTURE, STATUARY ORIGINAL	\$ 0.80 M
iv) ORIGINAL WORKS OF THE FREE FINE ARTS.	\$ 0.30 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

## Export and Investment Promotion Planning System

MISSION: 606 LOS ANGELES

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

- product/service information from Canadian companies



## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 606 LOS ANGELES

Market: 577 UNITED STATES OF AMERICA

Sector: 013 CONSUMER PRODUCTS

Subsector: 134 LEISURE PROD. TOOLS HARDWARE

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	31.06M	\$ 29.58M	\$ 26.84M	\$ 24.45M
Canadian Exports \$	3.00M	\$ 2.90M	\$ 2.70M	\$ 2.40M
Canadian Share of Import Market	9.80%	9.80%	9.70%	9.60%

## Major Competing Countries

## Market Share

i) 434 TAIWAN	028 %
ii) 112 FRANCE	008 %
iii) 265 JAPAN	008 %
iv) 237 ITALY	006 %
v) 051 UNITED KINGDOM	006 %
vi) 354 NETHERLANDS	005 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) YACHTS AND PLEASURE BPATS NOT OVER US\$15,000	\$ 0.20 M
ii) PLEASURE BOATS SAIL PROPELLED U/POWER OVER 31 FT.	\$ 0.21 M
iii) PARTS, YACHTS PLEASURE BOATS	\$ 0.25 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non competitive financing from Canada
- difficulties in obtaining credit facilities in Canada

## Export and Investment Promotion Planning System

MISSION: 606 LOS ANGELES

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade fairs
- participation in trade missions
- competitive export pricing for this market
- strong sectoral capability in Canada

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ATTENDANCE OF TRADE FAIRS AND BOATING EVENTS.

Results Expected: TO MAINTAIN KNOWLEDGE OF NEW PRODUCTS IN THE MARKET. DEVELOP MORE CONTACTS WITHIN THE INDUSTRY.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 606 LOS ANGELES

Market: 577 UNITED STATES OF AMERICA

Sector: 013 CONSUMER PRODUCTS

Subsector: 135 FURNITURE &amp; APPLIANCES

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	247.99M	\$ 225.45M	\$ 204.96M	\$ 177.66M
Canadian Exports \$	10.70M	\$ 9.60M	\$ 8.30M	\$ 6.30M
Canadian Share of Import Market	4.30%	4.25%	4.05%	3.51%

## Major Competing Countries

## Market Share

i) 265 JAPAN	032 %
ii) 268 KOREA	013 %
iii) 189 HONG KONG	009 %
iv) 434 TAIWAN	008 %
v) 128 GERMANY WEST	006 %
vi) 237 ITALY	004 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) ALL PRODUCTS COMPETITIVE IN CANADA	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- No factors reported by mission

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DEPARTMENT OF EXTERNAL AFFAIRS

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Export and Investment Promotion Planning System

MISSION: 606 LOS ANGELES

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- strong sectoral capability in Canada

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 606 LOS ANGELES

Market: 577 UNITED STATES OF AMERICA

Sector: 013 CONSUMER PRODUCTS

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	47010.00M	\$46890.00M	\$46111.00M	\$44720.00M
Canadian Exports \$	57.20M	\$ 56.80M	\$ 56.00M	\$ 54.80M
Canadian Share of Import Market	0.00%	0.00%	0.00%	0.00%

## Major Competing Countries

## Market Share

i) 605 ASIA OR FAR EAST	060 %
ii) 620 EUROPE	015 %
iii) 616 OTHER COUNTRIES	025 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 60-100 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) ALL FURNITURE	\$ 0.00 M
ii) ALL APPAREL	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada
- the availability of competitive Canadian financing

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Export and Investment Promotion Planning System

MISSION: 606 LOS ANGELES

COUNTRY: 577 UNITED STATES OF AMERICA

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 606 LOS ANGELES

Market: 577 UNITED STATES OF AMERICA

Sector: 014 EDUCATION, MEDICAL, HEALTH PROD

Subsector: 141 PHARMACEUTICALS, BIOTECHNOLOGY

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	3800.00M	\$ 3000.00M	\$ 2400.00M	\$ 1900.00M
Canadian Exports \$	54.00M	\$ 45.00M	\$ 37.00M	\$ 29.00M
Canadian Share of Import Market	1.40%	1.50%	1.40%	1.50%

## Major Competing Countries

## Market Share

i) 265 JAPAN	000 %
ii) 112 FRANCE	000 %
iii) 128 GERMANY WEST	000 %
iv) 577 UNITED STATES OF AMERICA	080 %
v) 051 UNITED KINGDOM	000 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Small but expanding

Products/services for which there are  
good market prospects

## Current Total Imports

	In Canadian \$
i) NATURAL CRUDE DRUGS, NSPF	\$ 14468.00 M
ii) VIRUSES, SERUMS, TOXINS, BIOLOGICAL PROD., ETC.	\$ 11537.00 M
iii) CHOLINE SALTS	\$ 3056.00 M
iv) DRUGS & RELATED PRODUCTS IN CAPSULES, PILLS, ETC. /	\$ 1608.00 M
v) ADRENOCORTAL HORMONES, SYNTHETIC, NSPF	\$ 1466.00 M
vi) MEDICINAL PREPS IN CAPSULES AMPOULES, PILLS, JUBES/	\$ 1423.00 M
vii) VITAMIN C AND ITS SALTS, SYNTHETIC	\$ 1075.00 M
viii) OTHER DRUGS INCLUDING SYBTHETIC	\$ 685.00 M
ix) GINSENG	\$ 366.00 M
x) ENZYMES	\$ 332.00 M

## Export and Investment Promotion Planning System

MISSION: 606 LOS ANGELES

COUNTRY: 577 UNITED STATES OF AMERICA

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- exports of certain products or services to this country are subject to Canadian export controls
- approval of technical standards can present problems in the case of some imported products

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- the apparent limited sectoral capability in Canada compared to other competing export countries
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- non-tariff protectionist measures which are difficult to overcome
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters
- other factor(s) described by the Trade Office as follows:

ALTHOUGH THERE ARE NO REAL QUOTA BARRIERS IN THIS INDUSTRY SECTOR THERE ARE U.S. GOVERNMENT AGENCY CONTROLS THAT PERTAIN TO MANY OF THE EXPORTABLE PRODUCTS—FOOD AND DRUG ADMINISTRATION APPROVAL, E. G. NEW DRUG APPROVAL, WILL BE MANDATORY FOR MANY PRODUCTS, AND THE U.S.

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- No factors reported by mission

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

- sourcing assistance from Canadian federal/provincial governments departments

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: FURTHER IDENTIFICATION OF CANADIAN FIRMS WITH INTEREST IN EXPORTING PRODUCT TO THE U.S.

Results Expected: TO GENERATE READY REFERRALS FOR ONFORWARDING TO AMERICAN IMPORTERS THAT EXPRESS INTEREST IN CANADIAN PRODUCT.



## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 606 LOS ANGELES

Market: 577 UNITED STATES OF AMERICA

Sector: 014 EDUCATION, MEDICAL, HEALTH PROD

Subsector: 142 HOSP. &amp; MEDICAL EQUIP. INSTRUM.

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	2500.00M	\$ 2300.00M	\$ 2100.00M	\$ 1700.00M
Canadian Exports \$	38.00M	\$ 38.00M	\$ 35.00M	\$ 32.00M
Canadian Share of Import Market	1.50%	1.60%	1.60%	1.80%

## Major Competing Countries

## Market Share

i) 128 GERMANY WEST	005 %
ii) 232 ISRAEL	001 %
iii) 265 JAPAN	004 %
iv) 354 NETHERLANDS	001 %
v) 051 UNITED KINGDOM	001 %
vi) 577 UNITED STATES OF AMERICA	085 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 60-100 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) XRAY APPARATUS FOR MEDICAL/DENTAL USE & PARTS/	\$ 11904.00 M
ii) DENTAL BURRS OF BURS	\$ 3849.00 M
iii) PARTS OF ELECTRO MEDICAL APPARATUS	\$ 3.20 M
iv) ELECTRO MEDICAL, APPARATUS NSPF	\$ 2552.00 M
v) OXYGEN THERAPY, ETC. APPARATUS, GAS MASKS, ETC.	\$ 1.90 M
vi) MECHAND-THERAPY APPLIANCES MASSAGE APPARATUS&PARTS	\$ 1.90 M
vii) RADIATION & APPARATUS USING RADIOISOTOPES, NSPF	\$ 1442.00 M
viii) MEDICAL SURGICAL INSTRUMENTS ETC., AND PARTS.	\$ 1167.00 M
ix) MEDICAL OR DENTAL RADIATION APPARATUS, U PARTS/	\$ 1132.00 M
x) X RAY APPARATUS & PARTS THEREOF	\$ 1400.00 M

## Export and Investment Promotion Planning System

MISSION: 606 LOS ANGELES

COUNTRY: 577 UNITED STATES OF AMERICA

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- approval of technical standards can present problems in the case of some imported products

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- the apparent limited sectoral capability in Canada compared to other competing export countries
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- No factors reported by mission

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

- sourcing assistance from Canadian federal/provincial governments departments

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: LIAISE WITH HOSPITAL GROUP PURCHASING ORGANIZATIONS TO ASSESS LOCAL REQUIREMENTS FOR CANADIAN PRODUCTS ON A POSSIBLE VOLUME BASIS.

Results Expected: TO GENERATE VOLUME DIRECT ORDER OPPORTUNITIES FOR CANADIAN MANUFACTURERS.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 606 LOS ANGELES

Market: 577 UNITED STATES OF AMERICA

Sector: 015 CONSTRUCTION INDUSTRY

Subsector: 151 BUILDING PRODUCTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1.40M	\$ 1.30M	\$ 1.20M	\$ 1.10M
Canadian Exports \$	196.00M	\$ 182.00M	\$ 156.00M	\$ 176.00M
Canadian Share of Import Market	14.00%	14.00%	13.00%	16.00%

## Major Competing Countries

## Market Share

i) 265 JAPAN	020 %
ii) 128 GERMANY WEST	015 %
iii) 577 UNITED STATES OF AMERICA	050 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are  
good market prospects

Current Total Imports

i) CONSTRUCTION MACHINERY	In Canadian \$
ii) PREFAB BLDGS	\$ 124.00 M
iii) KITCHEN & BATH CABINETS	\$ 70.00 M
iv) HOME/GARDEN EQUIP.	\$ 10.00 M
v) BUILDING STONE	\$ 34.00 M
	\$ 26.00 M

The Trade Office reports that the following factors influence Canadian  
export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector  
(sub-sector) in this market is lower than optimum mainly because of:

- non competitive pricing
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

## Export and Investment Promotion Planning System

MISSION: 606 LOS ANGELES

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

- product/service information from Canadian companies

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: FOLLOW-UP ON BUILDING STONE POTENTIAL WITH QUEBEC GRANITE CONSORTIUM.

Results Expected:

Activity: PROMOTE DRIE MARKETING PLAN FOR BUILDING MATERIALS.

Results Expected:

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: PROVIDE ASSISTANCE TO INDIVIDUAL KITCHEN AND BATH MANUFACTURERS AS FOLLOW-UP TO OCTOBER ANAHEIM EXHIBITION.

Results Expected:

Activity: IDENTIFY POTENTIAL REQUIREMENTS FOR PREFABRICATED BUILDINGS.

Results Expected:

Activity: DETERMINE SCOPE FOR INCREASED SALES OF HOME HARDWARE.

Results Expected:

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 606 LOS ANGELES

Market: 577 UNITED STATES OF AMERICA

Sector: 016 INDUSTRIAL MACHIN, PLANTS, SERV.

Subsector: 161 MANUFACT &amp; MATERIAL PLANT, EQP.

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	2.20M	\$ 2.10M	\$ 2.00M	\$ 2.50M
Canadian Exports \$	120.00M	\$ 100.00M	\$ 110.00M	\$ 100.00M
Canadian Share of Import Market	5.40%	4.76%	5.50%	4.00%

## Major Competing Countries

## Market Share

i) 265 JAPAN	061 %
ii) 434 TAIWAN	011 %
iii) 577 UNITED STATES OF AMERICA	010 %
iv) 112 FRANCE	008 %
v) 128 GERMANY WEST	004 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) PACKAGING MACHINERY	\$ 0.00 M
ii) FOOD PROCESS MACHINERY	\$ 0.00 M
iii) ENVIRONMENTAL EQUIPMENT	\$ 0.00 M
iv) ROBOTICS	\$ 0.00 M
v) (SEWAGE TREATMENT, AIR QUALITY IMPROVEMENTS)	\$ 0.00 M

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

i) Project Name: EXPANSION IN FOOD PROCESSING INDUSTRIES  
Approximate Value: \$ M  
Financing Source:  
For further info. please contact:

ii) Project Name: EXPENDITURES BY LOCAL SEWAGE AND WATER TREATMENT AGENCIES,  
Approximate Value: \$ 2000 M  
Financing Source:  
For further info. please contact:

## Export and Investment Promotion Planning System

MISSION: 606 LOS ANGELES

COUNTRY: 577 UNITED STATES OF AMERICA

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- the availability of competitive Canadian financing

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

- the adequacy of exporter information in Canadian Directories
- product/service information from Canadian companies

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 606 LOS ANGELES

Market: 577 UNITED STATES OF AMERICA

Sector: 016 INDUSTRIAL MACHIN. PLANTS, SERV.

Subsector: 163 TOOLS &amp; HARDWARE

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	4300.00M	\$ 4000.00M	\$ 4100.00M	\$ 3000.00M
Canadian Exports \$	39.00M	\$ 47.00M	\$ 48.00M	\$ 35.00M
Canadian Share of Import Market	1.20%	1.20%	1.20%	1.20%

## Major Competing Countries

## Market Share

i) 265 JAPAN	005 %
ii) 512 SWITZERLAND	001 %
iii) 128 GERMANY WEST	002 %
iv) 434 TAIWAN	001 %
v) 237 ITALY	001 %
vi) 577 UNITED STATES OF AMERICA	090 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 3-5 \$M

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects

## Current Total Imports

i) METAL CUTTING TOOLS	In Canadian \$
ii) POWER TOOLS	\$ 191.00 M
iii) METAL CUTTING MACHINERY	\$ 830.00 M
iv) METAL FORMING MACHINERY TOOLS	\$ 3130.00 M
v) TOOLS, DIES & JIGS	\$ 1248.00 M
	\$ 365.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- the apparent limited sectoral capability in Canada compared to other competing export countries
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

Export and Investment Promotion Planning System

MISSION: 606 LOS ANGELES

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- No factors reported by mission

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: LIAISING WITH TOOL DISTRIBUTORS/IMPORTERS TO ASSESS THEIR INTEREST IN CANADIAN TOOLING.

Results Expected: TO INCREASE CANADIAN TOOLING EXPORT SALES IN POST TERRITORY.



Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 606 LOS ANGELES

Country: 577 UNITED STATES OF AMERICA

## Highlights of Investment Environment

Estimated Value Of Equity Investment  
In Canada From This Post Territory:

\$ 0.00 M

Estimated Value Of Annual Direct Equity  
Investments To All Destinations From  
This Post Territory:

\$ 0.00 M

Country Destinations Of Direct  
Equity Investment From Post  
TerritoryEstm. Value  
\$ CDN% Of Annual Direct Equity  
Investment Outflows By  
Category Of Investors

1.	\$ . M	1. Corporations :	0.00 %
2.	\$ . M	2. Institutional :	0.00 %
3.	\$ . M	3. Entrepreneurs :	0.00 %
4.	\$ . M	4. Immigrant Entr.:	0.00 %

The Mission Has Reported Factors That Tend To Change  
Outward Flows Of Investment From The Post Territory Including:

- Corporate Search For Cheaper Production And/Or Operating Costs  
Outside The Country
- Corporate Expansion To Seek New Markets
- Corporate Expansion To Serve Better Existing Markets
- Territory Is Host To Active International Capital Market Which Is Focussed  
On International Capital Movements (e.g. N.Y., London, Tokyo)

The Mission Reports That Investors From The Post Territory Who Invest Abroad  
In Manufacturing Tend To Invest In The Following Sector(s) Subsector(s)

## -SECTOR(S)-

1. 005 COMM. & INFORM. EQP. & SERV
2. 004 DEFENCE PROGRAMS, PRODUCTS, SERV
3. 006 ELECTRONICS EQUIP. & SERV
4. 014 EDUCATION, MEDICAL, HEALTH PROD

## -SUBSECTOR(S)-

- 999 ALL SUB-SECTORS
- 999 ALL SUB-SECTORS
- 999 ALL SUB-SECTORS
- 999 ALL SUB-SECTORS

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 606 LOS ANGELES

Country: 577 UNITED STATES OF AMERICA

#### Equity Propensity Of Key Sources Of Investment From This Territory

Corporations : 100% Ownership Of Existing Corporate Facility  
Institutional :  
Entrepreneurs : Start-up Investment To Create New Enterprise (100% Ownership)  
Immigrant Entr.:

#### Sector Preferences By Type Of Key Investors

Corporations : Manufacturing Industries  
Institutional : Portfolio Investment  
Entrepreneurs : Manufacturing Industries  
Immigrant Entr.:

#### Investment Promotion Priority Sectors Sub-Sectors Program Plans And Anticipated Results.

Sector : 005 COMM. & INFORM. EQP. & SERV  
Subsector: 999 ALL SUB-SECTORS

#### Reason(s):

GROWTH POTENTIAL: LOCATION ECONOMICS (COMPARATIVE ECONOMIC ADVANTAGE VS CALIFORNIA INDUSTRY COST BASE AND OTHER COMPETING LOCATIONS)  
OPPORTUNITIES FOR TECHNOLOGY TRANSFER (SOUTHERN CALIFORNIA, ARIZONA

#### Program Plans:

IDENTIFICATION OF PROSPECTIVE INVESTOR FIRMS VIA COMMERCIAL INTELLIGENCE GATHERING (INCLUDING CORPORATE LIAISON CALLS)

Sector : 004 DEFENCE PROGRAMS, PRODUCTS, SERV  
Subsector: 999 ALL SUB-SECTORS

#### Reason(s):

AND SOUTHERN NEVADA HAVE SOME NATIONAL/WORLD LEADERS IN THE ABOVE INDUSTRY SECTORS/SUBSECTORS, WITH BURGEONING WAS TECHNOLOGY/PRODUCT DEVELOPMENT)

DATE: 88/01/25

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Report: 84 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 606 LOS ANGELES

Country: 577 UNITED STATES OF AMERICA

Investment Promotion Priority Sectors Sub-Sectors  
Program Plans And Actipicipated Results.

Sector : 004 DEFENCE PROGRAMS, PRODUCTS, SERV  
Subsector: 999 ALL SUB-SECTORS

Program Plans:  
ACTIVE PARTICIPATION IN REGIONAL VENTURE GROUP

Sector : 006 ELECTRONICS EQUIP. & SERV  
Subsector: 999 ALL SUB-SECTORS

Reason(s):  
CANADIAN PROJECT OPPORTUNITIES E.G. FDMP

Program Plans:  
OPPORTUNISTIC SPONSORSHIPS OF EVENTS WITH INVESTMENT INTERMEDIARIES  
(INCLUDING PROVINCIAL INPUTS)

Sector : 014 EDUCATION, MEDICAL, HEALTH PROD  
Subsector: 999 ALL SUB-SECTORS

Program Plans:  
DIRECT PROSPECTING AT INDUSTRY EXPOSITIONS PROVIDING INVESTMENT CANADA  
VISIBILITY

Sector : 016 INDUSTRIAL MACHIN, PLANTS, SERV.  
Subsector: 161 MANUFACT & MATERIAL PLANT, EQP.

Program Plans:  
STRATEGIC PARTICIPATION/CO-SPONSORSHIP OF ACTIVITIES WITH CHAMBER OF  
COMMERCE (INCLUDING PROVINCIAL INPUTS)

Sector : 012 PETROCHEM & CHEM PROD, EQP, SERV  
Subsector: 123 PLASTICS PRODUCTS, EQUIP, SERVIC

DATE: 88/01/25

DEPARTMENT OF EXTERNAL AFFAIRS

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 606 LOS ANGELES

Country: 577 UNITED STATES OF AMERICA

Investment Promotion Priority Sectors Sub-Sectors  
Program Plans And Actipicipated Results.

Sector : 012 PETROCHEM & CHEM PROD, EQP, SERV

Subsector: 123 PLASTICS PRODUCTS, EQUIP, SERVIC

Program Plans:

INTRODUCTION OF KEY TARGET INDUSTRY OFFICIALS TO CANADIAN INVESTMENT OPPORTUNITIES

Other Investment Program Plans

Activity(ies):

TAX REFORM - BRIEFING OF INVESTMENT INTERMEDIARIES AT TIME OF LEGISLATION

Activity(ies):

VIP VISITS - E. G. HON. DONALD MACDONALD

DATE: 88/01/25

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 606 LOS ANGELES

Country: 577 UNITED STATES OF AMERICA

Investment Promotion Activities Proposals

Type Of Event: 050 SEMINARS

Description: PORTFOLIO INVESTMENT

Priority:

Date: 00/00

Sector: 999 MULTIPLE SECTORS

Sub-Sector: 999 ALL SUB-SECTORS

Location: LOS ANGELES

Description: PARTNERS IN ENTERPRISE

Priority: 3

Date: 00/00

Sector: 999 MULTIPLE SECTORS

Sub-Sector: 999 ALL SUB-SECTORS

Location: PHOENIX/SCOTTSDALE

Type Of Event: 070 OTHER PROMOTIONAL EVENTS

Description: GROWTH INDUSTRY SECTOR STUDY

Priority: 1

Date: 03/88

Sector: 005 COMM. & INFORM. EGP. & SERV

Sub-Sector: 999 ALL SUB-SECTORS

Location: ARIZ/CAL/NEV

Type Of Event: 072 OUTGOING MISSION

Description: MEDICAL TECHNOLOGY/EQUIPMENT

Priority: 2

Date: 00/00

Sector: 014 EDUCATION, MEDICAL, HEALTH PROD

Sub-Sector: 999 ALL SUB-SECTORS

Location: LA/ORANGE C/S DIEGO

## Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 606 LOS ANGELES		
Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV		
010 FAIRS AFCEA	LAS VEGAS	0190
020 MISSION OUTGOING FEDERAL PROV. DEFENCE	LAS VEGAS	0290
024 MISSION INCOMING INCOMING BUYERS	LAS VEGAS	1089
Sector: 006 ELECTRONICS EQUIP. & SERV		
010 FAIRS SAN DIEGO ELECTRONICS	SAN DIEGO	0190
PHOENIX DAY	PHOENIX	0290
NATIONAL COMPUTER SHOW	LAS VEGAS	0689
COMDEX LAS VEGAS	LOS VEGAS	1189
Sector: 008 TRANSPORT SYS, EQUIP, COMP, SERV.		
010 FAIRS SEAFARE '90	LONG BEACH	0290
LONG BEACH BOAT SHOW	LONG BEACH	1089
SAN DIEGO INT'L AUTO SHOW	SAN DIEGO	0390
PACIFIC AUTO	LAS VEGAS	0290
SEMA/AI	LAS VEGAS	1289
APAA (AUTO PARTS)	LAS VEGAS	0889
PAS	SAN DIEGO	0490
ASIA	ARIZONA	1289
SEMA	LAS VEGAS	1189
APAA	LAS VEGAS	0889
024 MISSION INCOMING CDN INT'L AUTO SHOW	MONTREAL	0489
INCOMING BUYER'S MISSION	MONTREAL	0489
Sector: 011 OIL & GAS EQUIPMENT, SERVICES		
010 FAIRS SOCIETY OF PETROL ENGS.	VENTURA	0390
SPE OIL SHOW	BAKERSFIELD	0490
024 MISSION INCOMING INCOMING BUYER'S MISSION	CALGARY	0689
NATIONAL PETROLEUM SHOW	CALGARY	0689

## Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 606 LOS ANGELES		
Sector: 013 CONSUMER PRODUCTS		
010 FAIRS		
NAT'L SPORTING GOODS ASSN	ANAHEIM	0989
APPAREL MKT WEEK	LOS ANGELES	0489
MAGIC (MEN'S APPAREL)	LOS ANGELES	1089
40TH FALL MKT NATL SPORTING GOODS ASSN	ANAHEIM	0989
SOLO SHOW	SAN DIEGO	1189
Sector: 014 EDUCATION, MEDICAL, HEALTH PROD		
010 FAIRS		
AM. HEALTH CARE ASSN.	ANAHEIM	1089
CA. ASSN OF MED. LAB TECH	LOS ANGELES	1089
Sector: 015 CONSTRUCTION INDUSTRY		
010 FAIRS		
UNIFORM	LAS VEGAS	1289
Sector: 016 INDUSTRIAL MACHIN, PLANTS, SERV.		
010 FAIRS		
WESTPACK	ANAHEIM	0990
NAT'L HARDWARE HOME CENTER	LAS VEGAS	0290
CONSTRUCTION EQUIPMENT	LAS VEGAS	1089
KITCHEN & BATH	LOS ANGELES	1289

## Export and Investment Promotion Planning System

## 88/89 Trade and Economic Overview

Mission: 608 NEW YORK, CONSULATE GENERAL

Country: 577 UNITED STATES OF AMERICA

THE IMPACT OF BLACK MONDAY & THE SIGNIFICANT TRADE IMBALANCES BETWEEN THE US & ITS MAJOR TRADING PARTNERS CLOUD THE OUTLOOK FOR THE US (& OTHER MAJOR COUNTRIES) ECONOMIES IN 88 & EARLY 89. WHAT IS CLEAR IS THAT THE MAJOR DROP IN THE WEALTH OF US CONSUMERS ARISING FROM THE STOCK MARKET PLUMMET ESTIMATED BY SOME AT US\$1 TRIL. WILL SLOW CONSUMER SPENDING & SHAKE CONSUMER CONFIDENCE IN THE US. MOST ECONOMISTS HAVE LOWERED THEIR ESTIMATES OF US GROWTH IN 88 BY AT LEAST 1% & SEVERAL ARE EVEN PREDICTING A MILD RECESSION. NO MATTER WHICH OCCURS CDA STANDS TO BE A BENEFICIARY ALMOST TOTALLY BY VIRTUE OF THE FACT THAT WHILE MOST OFFSHORE EXPORTERS TO THE US HAVE BEEN HURT BY THE REDUCED PURCHASING POWER OF THE US \$ THE CDN \$ RELATIVE STABILITY & ATTRACTIVE EXCHANGE RATE WILL ENHANCE OUR COMPETITIVE POSITION & EXPORTS OF MANUFACTURED GOODS SHOULD CONTINUE TO GROW EVEN IF US DOMESTIC DISAPPEARANCE ARISING FROM VARIOUS ECONOMIC FEARS REAL OR IMAGINED FALLS. TO ILLUSTRATE US IMPORTS OF APPAREL OR FURNITURE COULD FALL DRASTICALLY BUT THESE LOSSES WILL BE FELT BY THE EXPORTER PENALIZED BY THEIR HIGHER PRICE & NOT CDA. SUPPLYING AS WE DO LESS THAN 1% OF US IMPORTS IN EITHER COMMODITY WE COULD ACTUALLY INCREASE OUR SALES & MARKET SHARE EVEN IN A FALLING MARKET. LARGER TICKET ITEMS WILL BE SIMILARLY AFFECTED & HIGHER OFFSHORE PRICES HAVE ALREADY IMPACTED ON THE IMPORTS OF AUTOMOBILES WITH THE NA INDUSTRY EXPECTED TO BENEFIT AS A RESULT. THE PREOCCUPATION WITH THE FREE TRADE NEGOTIATIONS WILL CONTINUE TO RATIFICATION & BEYOND AS CDN FIRMS RISE TO THE CHALLENGE OFFERED BY AN ENORMOUSLY EXPANDED MARKET & WILL SEEK THE ASSISTANCE OF THE POSTS. THIS IS CLEARLY INDICATED BY THE FACT THAT THE PUBLICITY GIVEN TO THE NEGOTIATIONS HAS ALREADY CREATED A GREATER AWARENESS OF THE US EXPORT MARKET AS MORE SMALL COMPANIES APPROACH THE POST APPEAR AT MARKETPLACE & PARTICIPATE IN THE NEBS PROGRAM. THE STOCK MARKET SELL-OFF FREE TRADE AGREEMENT & THE RELATIVE VALUE OF THE CDN \$ IN RELATIONSHIP TO THE US \$ ALL HAVE STRONG IMPACTS ON INVESTMENT DECISIONS INTO CDA. THE STOCK MARKET DECLINE WILL IMPACT INSTITUTIONAL INVESTORS & SMALL DIRECT INVESTORS IN THAT THEY ARE HIGHLY INFLUENCED BY THE PSYCHOLOGY OF THE MARKET & THESE INVESTORS MAY DELAY PLANS UNTIL THEY GET A "CLEAR PICTURE" OF FUTURE ECONOMIC CONDITIONS. FREE TRADE THE VALUE OF THE CDN \$ AND THE MEACH LAKE ACCORD ARE STRONG POSITIVE INFLUENCES ON INVESTMENT INTO CDA. IF STRONGLY PROMOTED INTERNATIONALLY THE ABOVE FACTORS WILL GENERATE SUBSTANTIAL NEW INVESTMENT INTO CDA. OUR GOAL IS TO DEVELOP 150 NEW QUALIFIED PROSPECTS IN 88-89. WE PLAN TO INITIATE IDENTIFY SERVICE & FOLLOWUP ON 50 NEW INVESTMENT DECISIONS FROM THE POST'S TERRITORY FOR A MIN. TOTAL OF \$200M CDN DLRS WITH MINIMUM NEW JOB CREATIONS TARGET BEING SET AT 1000. THIS IS WHAT WE WILL ACHIEVE AS A MINIMUM.



## Export and Investment Promotion Planning System

REPT: SYN-GEO 88/89 A. Post export program priorities

Region: UNITED STATES

Mission: 608 NEW YORK, CONSULATE GENERAL

Market: 577 UNITED STATES OF AMERICA

The Mission selected the following sectors as priority areas for export promotion activities for the coming fiscal year:

## 1. 001 AGRI &amp; FOOD PRODUCTS &amp; SERVICE

REASONS: THE FOOD PRODUCTS MARKET IS PROBABLY THE MOST COSMOPOLITAN SOPHISTICATED AND INSATIABLE ANYWHERE & CDN PRODUCTS HAVE GAINED A HIGH DEGREE OF ACCEPTANCE TO THE POINT WHERE CDN SOURCES ARE ALMOST REGARDED AS

## 2. 002 FISHERIES, SEA PRODUCTS &amp; SERV.

REASONS: HEALTH CONCERNS HAVE RESULTED IN A RISING PER CAPITA CONSUMPTION OF FISH & PENETRATION SHOULD/COULD INCREASE FURTHER. THE MARKET SERVED BY US MILITARY BROKERS IS VASE & VIRTUALLY UNTAPPED & BEARS FUR. INVESTI.

## 3. 004 DEFENCE PROGRAMS, PRODUCTS, SERV

REASONS: THE LUCRATIVE DEFENCE MARKET OFFERS CDN SUPPLIERS MANY OPPORTUNITIES TO SUPPLY EQUIP. & SERV. TO US MILITARY. IN 86 IT WAS EST. THAT NY STATE RANKED 3RD & NJ 13TH IN OVERALL EXPEN. TO DOD PROCUREMENT DLRS.

## 4. 005 COMM. &amp; INFORM. EQP. &amp; SERV

REASONS: COMMUNICATION EQUIPMENT IS STRONG GROWTH AREA & CDN EQUIPMENT & SERV. HAVE SHOWN ABILITY TO CARVE OUT SPECIALIZED NICHES. PROXIMITY OF SUP. STABLE CDN \$ VIS-A-VIS US & DEVELOP. OF NEW TECHNOLOGIES ARE AMONG

## 5. 013 CONSUMER PRODUCTS

REASONS: SHEER MARKET SIZE & INCREASED CONCENTRATION ON US MARKET BY CDN APPAREL & FURN. MFG HAS CAUSED CDN VENDORS TO BE MORE FAIRLY EVALUATED & ACCEPTED. MKT IS VIRTUALLY INSATIABLE & IN CASE OF RESIDENTIAL FURN.

The most important current Canadian export sectors to this market are (based on actual export sales):

1. 008 TRANSPORT SYS, EQUIP, COMP, SERV.
2. 010 MINE, METAL, MINERAL PROD & SRV
3. 001 AGRI & FOOD PRODUCTS & SERVICE
4. 004 DEFENCE PROGRAMS, PRODUCTS, SERV
5. 005 COMM. & INFORM. EQP. & SERV
6. 013 CONSUMER PRODUCTS

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 608 NEW YORK, CONSULATE GENERAL

Market: 577 UNITED STATES OF AMERICA

Sector: 001 AGRI &amp; FOOD PRODUCTS &amp; SERVICE

Subsector: 015 SEMI &amp; PROCESSED FOOD &amp; DRINK

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	3.50M	\$ 3.40M	\$ 3.20M	\$ 3716.00M
Canadian Exports \$	750.00M	\$ 750.00M	\$ 702.00M	\$ 770.00M
Canadian Share of Import Market	22.00%	22.00%	22.00%	21.00%

## Major Competing Countries

## Market Share

i) 410 NORWAY	010 %
ii) 093 DENMARK	010 %
iii) 112 FRANCE	010 %
iv) 011 AUSTRALIA	005 %
v) 370 NEW ZEALAND	005 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects

## Current Total Imports

	In Canadian \$
i) MEAT	\$ 522.00 M
ii) BAKED GOODS	\$ 100.00 M
iii) FRESH VEGETABLES	\$ 50.00 M
iv) POTATOES	\$ 23.00 M
v) SPECIALTY ITEMS	\$ 10.00 M
vi) CHEESE	\$ 5.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- approval of technical standards can present problems in the case of some imported products

## Export and Investment Promotion Planning System

MISSION: 608 NEW YORK, CONSULATE GENER COUNTRY: 577 UNITED STATES OF AMERICA

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- participation in trade fairs

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: TAP HAS DECIDED TO CONTINUE BUYER IDENTIFICATION PROGRAM.

Results Expected: OUR BASIS OF CURRENT PRPGRAM EXPECT 50 TO 75 FOOD VENDORS WILL HAVE PROSPECTIVE DIRECT BUYERS IDENTIFIED TO THEM.

Activity: WE WISH TO UNDERTAKE AN IDENTIFICATION SURVEY OF FOOD BROKERS AT SOUTHERN NEW JERSEY WHICH FALLS TO US WITH THE CLOSING OF PHILADELPHIA.

Results Expected: SUFFICIENT INTEREST WILL PROMPT ORGANIZATION OF FOOD SHOWING IMPORTANT ATLANTIC CITY MARKET POSSIBILITY IN CONJUNCTION WITH PROVINCES.

Activity: FOLLOW-UP WITH CANADIAN EXHIBITORS FROM 87 ALBANY SOLO FOOD SHOW.

Results Expected: TO INCREASE CANADIAN PRESENCE IN ALBANY AND SURROUNDING AREAS.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: US MILITARY MARKET FOR FOODSTUFF IS VITALLY BILLIONS OF \$'S AND EXCEEDS MANY LARGE CHAINS. THERE IS A RIGID PROCUREMENT PROCESS WHICH MUST BE FOLLOWED. OUR INTEREST IS TO ESTABLISH A) CONTACTS IN ADMIN. & IDENTIFY PREQUALIFICATION STEPS B) TO IDENTIFY /

Results Expected: TO INTRODUCE A MINIMUM OF 25 FIRMS TO MILITARY SALES SYSTEMS.

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Export and Investment Promotion Planning System

MISSION: 608 NEW YORK, CONSULATE GENER COUNTRY: 577 UNITED STATES OF AMERICA

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: FOOD SERVICE PRODUCTS—THIS AREA CAN BE EXPLORED FURTHER BY SCHEDULING CALLS FROM FOOD SERVICE/INSTITUTIONAL DISTRIBUTORS AND BROKERS TO DETERMINE WHETHER CDN FIRMS COULD EXPLORE REPRESENTATIONAL POSSIBILITIES WITH THEM. MARKET SECTOR HAS SOME PROMISE WITH/

Results Expected: TO INTRODUCE AS MANY NEW FIRMS AS POSSIBLE TO THE FOOD SERVICE OR INSTITUTIONAL MARKET IN OUR AREA.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 608 NEW YORK, CONSULATE GENERAL

Market: 577 UNITED STATES OF AMERICA

Sector: 002 FISHERIES, SEA PRODUCTS &amp; SERV.

Subsector: 021 FISH &amp; SHELLFISH &amp; OTHER PROD

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	4200.00M	\$ 4000.00M	\$ 3800.00M	\$ 4000.00M
Canadian Exports \$	1200.00M	\$ 1000.00M	\$ 1000.00M	\$ 800.00M
Canadian Share of Import Market	28.00%	25.00%	26.00%	20.00%

## Major Competing Countries

## Market Share

i) 265 JAPAN	006 %
ii) 224 IRELAND	005 %
iii) 410 NORWAY	005 %
iv) 093 DENMARK	003 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are  
good market prospectsCurrent Total Imports  
In Canadian \$

i) COD	\$ 271.00 M
ii) LOBSTER	\$ 147.00 M
iii) SCALLOPS	\$ 68.00 M
iv) FLOUNDER, SOLE	\$ 64.00 M
v) SALTFISH	\$ 46.00 M
vi) SALMON	\$ 27.00 M
vii) HALIBUT	\$ 24.00 M

The Trade Office reports that the following factors influence Canadian  
export performance in this market for this sector (sub-sector).

- there are import restrictions which can present significant problems
- the degree of import duty protection of local industry tends to be low

## Export and Investment Promotion Planning System

MISSION: 608 NEW YORK, CONSULATE GENER COUNTRY: 577 UNITED STATES OF AMERICA

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- No factors reported by mission

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- participation in trade fairs
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada
- the availability of competitive Canadian financing

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: TAP HAS DECIDED TO CONTINUE BUYER IDENTIFICATION PROGRAM. SCHEDULE CALLS UPON PROSPECTIVE OUTLETS FOR REPRESENTATION.

Results Expected: OUR BASIS OF CURRENT PROGRAM WXPCT 50 TO 75 FOOD VENDORS WILL HAVE PROSPECTIVE DIRECT BUYERS IDENTIFIED TO THEM. TO OBTAIN ADDITIONAL SALES VOLUME.

Activity: WE WISH TO UNDERTAKE AN IDENTIFICATION SURVEY OF FOOD BROKERS AT SOUTHERN NEW JERSEY WHICH FALLS TO US WITH THE CLOSING OF PHILADELPHIA.

Results Expected: SUFFICIENT INTEREST WILL PROMPT ORGANIZATION OF FOOD SHOWIN IMPORTANT ATLANTIC CITY MARKET POSSIBILITY IN CONJUNCTION WITH PROVINCES.

Activity: OUR FISHERIES RECEPTION IS TO BE CONTINUED EVERY OTHER YEAR AND IS TO BE PROVINCIALY FUNDED.

Results Expected: INTRODUCE 5 NEW PRODUCERS TO 10-15 NEW BROKER /WHOLESALERS.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: US MILITARY MARKET FOR FOODSTUFF IS VIRTUALLY BILLIONS OF \$'S AND EXCEEDS MANY LARGE CHAINS. THERE IS A RIGID PROCUREMENT PROCESS WHICH MUST BE FOLLOWED. OUR INTEREST IS TO ESTABLISH A) CONTACTS IN ADMIN. & IDENTIFY PREGUALIFICATION STEPS B) TO IDENTIFY FOOD BRO/

Results Expected: TO INTRODUCE A MINIMUM OF 25 FIRMS TO MILITARY SALES SYSTEMS.

## Export and Investment Promotion Planning System

MISSION: 608 NEW YORK, CONSULATE GENER COUNTRY: 577 UNITED STATES OF AMERICA

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: WIDE ETHNIC MIXTURE INTERRITORY COULD PROVIDE OPPORTUNITIES FOR UNDERUTILIZED SPECIES FROM CDN WATERS. WITH EXPORT SUPPORT FUNDS, WE PLAN A SURVEY OF FISH BROKERS TO IDENTIFY DESIRABLE BUT HITHERTO NOT OFFERED CANADIAN SPECIES.

Results Expected: VERY DIFFICULT TO DETERMINE PENDING RESPONSE OF CONSUMERS AND AVAILABILITY FROM CANADA.

Activity: FOOD SERVICE PRODUCTS-THIS AREA CAN BE EXPLORED FURTHER BY SCHEDULING CALLS FROM FOOD SERVICE/INSTITUTIONAL DISTRIBUTORS AND BROKERS, TO DETERMINE WHETHER CDN FIRMS COULD EXPLORE REPRESENTATIONAL POSSIBILITIES WITH THEM. MARKET SECTOR HAS SOME PROMISE WITH/

Results Expected: TO INTRODUCE AS MANY NEW FIRMS AS POSSIBLE TO THE FOOD SERVICE OR INSTITUTIONAL MARKET IN OUR AREA.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 608 NEW YORK, CONSULATE GENERAL

Market: 577 UNITED STATES OF AMERICA

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Subsector: 041 AEROSPACE &amp; MARINE

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import)	\$ 19300.00M	\$17600.00M	\$16900.00M	\$16100.00M
Canadian Exports	\$ 120.00M	\$ 110.00M	\$ 105.00M	\$ 0.00M
Canadian Share of Import Market	1.00%	1.00%	0.00%	0.00%

Major Competing Countries

Market Share

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) FLEX & HARD CIRCUITS	\$ 0.00 M
ii) INVESTMENT CASTINGS	\$ 0.00 M
iii) ELECTRONIC CHASSIS	\$ 0.00 M
iv) ELECTRONIC SUBASSEMBLIES	\$ 0.00 M
v) MACHINED PARTS	\$ 0.00 M
vi) ELECTRONIC COMPONENTS	\$ 0.00 M

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

i) Project Name: AEGIS PROGRAM (RCA)

Approximate Value: \$ 2.6 M

Financing Source: 012 DOM

For further info. please contact:

CANADIAN CONSULATE GENERAL, NEW YORK



## Export and Investment Promotion Planning System

MISSION: 608 NEW YORK, CONSULATE GENER COUNTRY: 577 UNITED STATES OF AMERICA

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- the apparent limited sectoral capability in Canada compared to other competing export countries
- other factor(s) described by the Trade Office as follows:  
PERCEIVED DIFFICULTIES IN BUYING ABROAD COUPLED WITH PRESENCE IN MARKET PLACE CREATE PROBLEMS FOR MANY CANADIAN SUPPLIERS. THEY ARE SOMETIMES REGARDED AS HAVING NO REAL COMMITMENT BY BUYERS.

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- competitive export pricing for this market

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: WHILE FAIRS AND MISSION PROGRAMMES FOR FOR POST ARE JUST BEING STARTED, RESULTANT FOLLOW UP EFFORTS WITH PARTICIPANTS ARE EXPECTED TO CONTINUE FOR SOME TIME.

Results Expected: NEW BUSINESS OPPORTUNITIES WITH U.S. PRIMES.

Activity: POST PARTICIPATES IN HITECH CONFERENCE ON AN ANNUAL BASIS & PROVIDES GUIDANCE TO CANADIAN FIRMS WISHING TO ENTER DEFENCE MARKET HERE.

Results Expected: NEW BUSINESS OPPORTUNITIES WITH U.S. PRIMES.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: POST WILL INCREASE LIAISON WITH DEFENCE CONTRACTORS RELATIVE TO ENSURING THEIR PARTICIPATION IN PLANNED EVENTS AND RAISING THEIR LEVEL OF AWARENESS AS TO CANADIAN CAPABILITIES.

Results Expected: BETTER RESPONSE TO SOLICITATIONS FOR FAIRS & MISSIONS PLUS INCREASED LEVEL OF BID OPPORTUNITIES FOR CANADIAN FIRMS.

Export and Investment Promotion Planning System

MISSION: 608 NEW YORK, CONSULATE GENER COUNTRY: 577 UNITED STATES OF AMERICA

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: THROUGH OUR MONITORING OF AWARDS OF MAJOR DEFENCE CONTRACTS TO FIRMS IN TERRITORY, WE WILL ENCOURAGE PROCUREMENT IDENTIFICATION VISITS TO CANADA IN THE STYLE OF WESTINGHOUSE AND RCA.

Results Expected: DEPENDING ON DRIE OFFICES ABILITY TO IDENTIFY NEW CANADIAN COMPANIES WORKING TO MIL SPEC AN EXERCISE SUCH AS DESCRIBED CD. INTRODUCE 6-10 NEW SUPPLIERS.

Activity: COUNSEL 30-40 CANADIAN SUPPLIERS ON ENTERING THE TERRITORY AEROSPACE DEFENCE MARKET.

Results Expected: ANTICIPATE INCREASED NUMBERS OF CDN. FIRMS WILL BE REQUESTED TO BID ON AEROSPACE PROJECTS.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 608 NEW YORK, CONSULATE GENERAL

Market: 577 UNITED STATES OF AMERICA

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Subsector: 043 ELECTRICAL &amp; ELECTRONIC

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	4.00M	\$ 3.80M	\$ 3.50M	\$ 0.00M
Canadian Exports \$	60.00M	\$ 55.00M	\$ 23.00M	\$ 0.00M
Canadian Share of Import Market	1.50%	1.40%	1.00%	0.00%

## Major Competing Countries

## Market Share

i) 051 UNITED KINGDOM	000 %
ii) 128 GERMANY WEST	000 %
iii) 232 ISRAEL	000 %
iv) 112 FRANCE	000 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) MILLIMETER WAVE TECHNOLOGY	\$ 0.00 M
ii) SECURE LOCAL AREA NETWORKS	\$ 0.00 M
iii) SENSORS - RADAR AND NIGHT VIEWING	\$ 0.00 M
iv) AUTOMATED FIRE CONTROL SYSTEMS	\$ 0.00 M
v) COMPUTER AIDED LOGISTIC SUPPORT	\$ 0.00 M
vi) SATELLITE SYSTEMS (SMALL MANOACKED)	\$ 0.00 M
vii) SECURE ADP (AUTOMATIC DATA PROCESSING SYSTEMS)	\$ 0.00 M
viii) VHSIC (VERY HIGH SPEED INTEGRATED CIRCUITS) TECHN.	\$ 0.00 M
ix) NEW HF AND VHF RADIO TECHNOLOGIES	\$ 0.00 M
x) ARTIFICIAL INTELLIGENCE (AI)	\$ 0.00 M

Projects or portion of projects which are still in the planning  
stage and for which Canadian companies might have reasonable prospects.

i) Project Name: ARMY COMMAND & CONTROL SYSTEMS (ACCS) COM-  
MON HARDWARE & SOFTWARE (SUBCONTRACTING)

Approximate Value: \$ 1B M

Financing Source: 012 DOM

For further info. please contact:

P. WILLIAMS, CNGNY, TLX: 62014481 TILO OFFICE, CECOM/

## Export and Investment Promotion Planning System

MISSION: 608 NEW YORK, CONSULATE GENER COUNTRY: 577 UNITED STATES OF AMERICA

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

ii) Project Name: ENHANCED POSITION LOCATING & REPORTING SYSTEMS(EPLRS)SECOND SOURCING FOR MFR/

Approximate Value: \$ 2.5 M

Financing Source: 012 DOM

For further info. please contact:

SAME AS ABOVE

iii) Project Name: SINGARS - STANDARD GENERAL PURPOSE MILITARY RADIO - SECOND SOURCING.

Approximate Value: \$ 2.5 M

Financing Source: 012 DOM

For further info. please contact:

SAME AS ABOVE

iv) Project Name: ADVANCE FIELD ARTILLERY SYSTEM (AFAS)

Approximate Value: \$ 270 M

Financing Source: 012 DOM

For further info. please contact:

SAME AS ABOVE

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- approval of technical standards can present problems in the case of some imported products

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- the apparent limited sectoral capability in Canada compared to other competing export countries
- other factor(s) described by the Trade Office as follows:  
PENETRATION OF MILITARY MARKET REQUIRES A SUSTAINED MARKETING EFFORT OVER SEVERAL YEARS EVEN IN THE ABSENCE OF INITIAL SALES. MANY SMALLER COMPANIES DO NOT HAVE THE RESOURCES TO COMMIT TO SUCH A STRATEGY.

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade fairs
- use of Canadian Government export promotion activities
- the existence of a bilateral economic/trade arrangement between Canada and this country

## Export and Investment Promotion Planning System

MISSION: 608 NEW YORK, CONSULATE GENER COUNTRY: 577 UNITED STATES OF AMERICA

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: UNDER AUSPICES OF NEWLY ESTABLISHED WORKING GROUP AT CECOM, FORT MONMOUTH, IDENTIFY SUITABLE PROJECTS TO BE PURSUED UNDER THE DEFENCE DEVELOPMENT SHARING PROGRAM (DDSP)

Results Expected: INCREASED PARTICIPATION OF CANADIAN FIRMS IN R & D PROJECTS AT CECOM LEADING TO CONTRACT AWARDS IN RANGE OF \$5MILLION IN NEXT 5 YEARS.

Activity: CONTINUE TO CALL ON SENIOR MILITARY AND CIVILIAN OFFICIALS (IN PARTICULAR NEW ARRIVALS) IN THE PROCUREMENT AND TECHNICAL DIRECTORATES TO BRIEF THEM ON CANADIAN CAPABILITIES.

Results Expected: IMPROVED ACCESS OF CANADIAN COMPANIES TO KEY DECISION MAKERS.

Activity: WORK WITH THE CANADIAN COMMERCIAL CORPORATION AND CECOM, FORT MONMOUTH TO ENSURE THAT COMPANIES WITH GOOD PROSPECTS ARE ON RESPECTIVE BIDDERS MAILING LISTS.

Results Expected: CANADIAN COMPANIES WITH APPROPRIATE TECHNOLOGIES, WILL BE WELL PLACED TO RECEIVE BID SETS THUS BECOMING AWARE OF NEW OPPORTUNITIES.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ESTABLISHMENT OF WORKING GROUP FOR THE IMPLEMENTATION OF THE DDSP AT U.S. ARMY ARMAMENT RESEARCH, DEVELOPMENT AND ENGINEERING CENTRE (ARDEC), PICATINNY ARSENAL, NEW JERSEY.

Results Expected: INCREASED AWARENESS OF CANADIAN FIRMS LEADING TO CONTRACT AWARDS IN RANGE OF \$2MILLION \$ IN 5 YEARS PERIOD.

Activity: ORGANIZATION OF VISIT OF MEMBERS OF THE NEWLY ESTABLISHED WORKING GROUP TO DEFENCE FACILITIES IN CANADA.

Results Expected: IDENTIFICATION OF CANADIAN COMPANIES WITH CAPABILITIES TO WORK ON JOINTLY FUNDED R & D PROJECTS.

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DEPARTMENT OF EXTERNAL AFFAIRS

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Export and Investment Promotion Planning System

MISSION: 608 NEW YORK, CONSULATE GENER COUNTRY: 577 UNITED STATES OF AMERICA

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: INTRODUCTION OF HEIGHT NEW COMPANIES TO CECOM AND ARDEC.

Results Expected: FIRMS WILL HAVE OPPORTUNITY TO BID ON UPCOMING PROJECTS, ESTIMATED TO BE VALUED IN EXCESS OF \$5 MILLION.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 608 NEW YORK, CONSULATE GENERAL

Market: 577 UNITED STATES OF AMERICA

Sector: 005 COMM. &amp; INFORM. EGP. &amp; SERV

Subsector: 053 TELECOMMUNICATIONS (INC SPACE)

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	6.60M	\$ 6.30M	\$ 5.70M	\$ 5.20M
Canadian Exports \$	927.00M	\$ 891.00M	\$ 810.00M	\$ 654.00M
Canadian Share of Import Market	14.00%	14.20%	12.60%	12.60%

## Major Competing Countries

Market Share

- i) 265 JAPAN 000 %
- ii) 268 KOREA 000 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

In Canadian \$

- i) SOFTWARE: E. G. INTERFACING LAN'S \$ 0.00 M
- ii) TELECOMMUNICATIONS HARDWARE, E. G. MULTIPLEXERS \$ 0.00 M

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

- i) Project Name: PBX'S PABX'S, LAN'S  
Approximate Value: \$ M  
Financing Source: 012 DOM  
For further info. please contact:  
D. GARRETSON CDN CONS. GEN. N. Y. TLX: 126242DOMCAN NYK
- ii) Project Name: OFFICE AUTOMATION SYSTEMS  
Approximate Value: \$ M  
Financing Source: 012 DOM  
For further info. please contact:  
AS ABOVE
- iii) Project Name: TELECOM MANAGEMENT SOFTWARE SYSTEMS  
Approximate Value: \$ M  
Financing Source: 012 DOM  
For further info. please contact:  
AS ABOVE

## Export and Investment Promotion Planning System

MISSION: 608 NEW YORK, CONSULATE GENER COUNTRY: 577 UNITED STATES OF AMERICA

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

- iv) Project Name: CALL MANAGEMENT  
Approximate Value: \$ M  
Financing Source: O12 DOM  
For further info. please contact:  
AS ABOVE.

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- other factor(s) described by the Trade Office as follows:  
LACK OF COMMITTED RESOURCES TO SUSTAIN MARKETING EFFORT.

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- use of Canadian Government export promotion activities
- competitive export pricing for this market

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: EXPAND OUR DATA BASE OF SUITABLE DISTRIBUTION AND SALES AGENTS FOR CANADIAN SUPPLIERS OF TELECOMMUNICATIONS RELATED PRODUCTS.

Results Expected: INCREASED NUMBER OF REPS. AND DISTRIBUTORS IN NY-NJ-CT TERRITORY.

Activity: CONTINUE INVESTIGATION OF SUITABLE TRADESHOWS/SEMINARS ETC, EVALUATING THEIR EFFECTIVENESS FOR PARTICIPATION BY CANADIAN SUPPLIERS.

Results Expected: INCREASE BUSINESS OPPORTUNITIES FOR CANADIAN SUPPLIERS THROUGH GREATER MARKET EXPOSURE.



## Export and Investment Promotion Planning System

MISSION: 608 NEW YORK, CONSULATE GENER COUNTRY: 577 UNITED STATES OF AMERICA

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: UTILIZE "WIN" TO IDENTIFY & CONTACT MORE CANADIAN SUPPLIERS INVITING THEIR PARTICIPATION IN TELECOMMUNICATIONS TRADE-SHOWS AS WELL AS VISIT PROSPECTS HERE WITH GOVERNMENT ASSISTANCE AS APPROPRIATE.

Results Expected: INCREASED BUSINESS OPPORTUNITIES FOR CANADIAN ENTREPRENEURS.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: IMPROVE OUR DATA BASE OF TELECOMMUNICATIONS COMPANIES TO SHOW THE SPECIFIC PRODUCTS NOW HANDLED BY THEM.

Results Expected: FACILITATE QUICKER AND CLOSER MATCH BETWEEN TELECOMMUNICATIONS COMPANIES AND CANADIAN SUPPLIERS.

Activity: DEVELOP AND BUILD OUR CONTACTS WITH KEY TELECOMMUNICATIONS ACCOUNTS IN OUR TERRITORY.

Results Expected: PROVIDE CANADIAN SUPPLIERS WITH MORE INFORMATION ENHANCING THEIR SELLING STRATEGY.

Activity: DEVELOP A MARKET INTRODUCTION PACKAGE TO ASSIST NEW CANADIAN COMPANIES WISHING TO ENTER THE NYC AREA MARKETS.

Results Expected: INCREASE CONFIDENCE LEVEL OF NEW CANADIAN ENTREPRENEURS BY PREPARING THEM FOR THIS MARKET AND INCREASING THEIR PROBABILITY OF SUCCESS.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 608 NEW YORK, CONSULATE GENERAL

Market: 577 UNITED STATES OF AMERICA

Sector: 005 COMM. &amp; INFORM. EQP. &amp; SERV

Subsector: 054 COMPUTERS, SOFTWARE &amp; SYSTEMS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	30.00M	\$ 28.80M	\$ 28.00M	\$ 20.70M
Canadian Exports \$	68.60M	\$ 66.00M	\$ 65.00M	\$ 63.00M
Canadian Share of Import Market	1.00%	1.00%	1.00%	1.00%

## Major Competing Countries

## Market Share

i) 051 UNITED KINGDOM	000 %
ii) 265 JAPAN	000 %
iii) 237 ITALY	000 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

## Current status of Canadian exports:

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) SOFTWARE WITH EMPHASIS ON: ACCOUNTING, REALESTATE/	\$ 0.00 M
ii) SOFTWARE FOR IBM PC OR IBM PC COMPATIBLE EQUIPMENT	\$ 0.00 M
iii) COMPUTER GRAPHICS	\$ 0.00 M
iv) CONSULTING/PROGRAMMING/EDUCATION & TRAINING.	\$ 0.00 M

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

- i) Project Name: SOFTWARE PACKAGES & PERIPHERALS TO FILL IDENTIFIABLE MARKET NICHES.

Approximate Value: \$ M

Financing Source: 012 DOM

For further info. please contact:

D. GARRETSON CDN. CON. GEN. N. Y. TLX: 126242 DOMCAN NYK

- ii) Project Name: ACCOUNTING/FINANCIAL APPLICATIONS SOFTWARE.

Approximate Value: \$ M

Financing Source: 012 DOM

For further info. please contact:

SAME AS ABOVE.

## Export and Investment Promotion Planning System

MISSION: 608 NEW YORK, CONSULATE GENER COUNTRY: 577 UNITED STATES OF AMERICA

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

iii) Project Name: FOSSIL FUEL UTILITY TRAINING APPLICATIONS.

Approximate Value: \$ M  
Financing Source: 012 DOM  
For further info. please contact:  
AS ABOVE

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- other factor(s) described by the Trade Office as follows:  
LACK OF COMMITTED RESOURCES TO SUSTAIN MARKETING EFFORT.

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- use of Canadian Government export promotion activities

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: EXPAND OUR DATA BASE OF SUITABLE DISTRIBUTION AND SALES AGENTS FOR CDN SUPPLIERS OF SOFTWARE.

Results Expected: INCREASED NUMBER OF REPS. AND DISTRIBUTORS IN THE NY-NJ-CT TERRITORY.

Activity: IDENTIFY, EVALUATE APPLICABLE TRADE SHOWS/SEMINARS, ETC. FOR PARTICIPATION BY CDN SUPLIERS.

Results Expected: INCREASE MARKET OPPORTUNITIES FOR CANADIAN SUPLIERS THROUGH GREATER MARKET EXPOSURE.

Activity: UTILIZE "WIN" TO IDENTIFY & CONTACT MORE CDN SUPPLIERS INVITING THEIR PARTICIPATION IN COMPUTER/SOFTWARE TRADE SHOWS AS WELL AS VISIT PROSPECTS HERE WITH GOVERNMENT ASSISTANCE AS APPROPRIATE.

Results Expected: INCREASE BUSINESS OPPORTUNITIES FOR CDN ENTR-EPRENEURS.

Export and Investment Promotion Planning System

MISSION: 608 NEW YORK, CONSULATE GENER COUNTRY: 577 UNITED STATES OF AMERICA

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: IMPROVE OUR DATA BASE OF REPRESENTATIVES/DISTRIBUTORS TO SHOW THE SPECIFIC PRODUCTS NOW HANDLED BY THEM.

Results Expected: FACILITATE QUICKER AND CLOSER MATCH BETWEEN REPS/DISTRIBUTORS AND CDN SUPPLIERS.

Activity: DEVELOP AND BUILD OUR CONTACTS OF VARS (VALUE ADDED RESELLERS) FOR COMPUTER SOFTWARE AND RELATED PRODUCTS.

Results Expected: INCREASE CONFIDENCE LEVEL OF NEW CDN ENTREPRENEURS BY PREPARING THEM FOR THIS MARKET AND INCREASING THEIR PROBABILITY OF SUCCESS.

Activity: DEVELOP A MARKET INTRODUCTION PACKAGE TO ASSIST NEW CDN COMPANIES WISHING TO ENTER THE NYC AREA MARKETS.

Results Expected: INCREASE CONFIDENCE LEVEL OF NEW CDN ENTREPRENEURS BY PREPARING THEM FOR THIS MARKET AND INCREASING THEIR PROBABILITY OF SUCCESS.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 608 NEW YORK, CONSULATE GENERAL

Market: 577 UNITED STATES OF AMERICA

Sector: 013 CONSUMER PRODUCTS

Subsector: 131 APPAREL (CLOTH, FUR, SHOES) TEXT

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	285.00M	\$ 260.00M	\$ 250.00M	\$ 250.00M
Canadian Exports \$	350.00M	\$ 345.00M	\$ 338.00M	\$ 307.50M
Canadian Share of Import Market	1.00%	1.00%	1.00%	1.00%

## Major Competing Countries

## Market Share

i) 189 HONG KONG	005 %
ii) 192 PEOPLE'S REP OF CHINA	004 %
iii) 268 KOREA	004 %
iv) 614 SOUTH AMERICA	002 %
v) 613 CENTRAL AMERICA	002 %
vi) 608 WEST EUROPE	002 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

## Current status of Canadian exports:

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) FUR GARMENTS	\$ 200.00 M
ii) WOMEN'S WEAR	\$ 40.00 M
iii) MENSWEAR	\$ 6.00 M
iv) CHILDRENS WEAR	\$ 2.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- No factors reported by mission

## Export and Investment Promotion Planning System

MISSION: 608 NEW YORK, CONSULATE GENER COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: CONTINUE TO SEEK SUPPORT FOR ONGOING EVENTS PROGRAM AS OUTLINED IN POST STRATEGY THROUGH EXPANSION OF CANADA APPAREL CENTRE AND CANADIAN SELECTION EVENTS OF POST.

Results Expected: INCREASE IDENTIFIABLE BUSINESS INFLUENCE BY 20%.

Activity: CONTINUE MARKET & TRADE SHOW EVALUATION FOR SPECIALIZED CATEGORIES: PRIORITY CHILDRENS WEAR, PLUS BRIDAL, SPECIAL SIZES, PRIVATE LABELS, UNIFORMS, MEN'S CASUAL, ACTIVE WEAR WITH VIEW TO INCREASED TRADE SHOW PARTICIPATION.

Results Expected: INCREASE NUMBER OF EXHIBITORS IN APPROPRIATE SHOWS FROM 0-3 TO 5-10.

Activity: DISTRIBUTE 500 MARKETING HANDBOOKS AND EXPANSION OF RECIPIENT LIST EVERY TWO YEARS TO 1)NEWLY IDENTIFIED CO'S. 2)CDN FASHION PRESS AND REGIONAL OFFICES 3)NEW COMERS TO OFFICE 4) AS UPDATE TO COMPANIES IN PROCESS OF ESTABLISHING.

Results Expected: IDENTIFICATION OF THIRTY COMPANIES CAPABLE OF EXPORTING BUT NOT DOING SO. 2)PROVISION OF INFO NEEDED TO UPGRADE ANOTHER FIFTY WHO MAY ALREADY BE INTERESTED BUT NOT YET CAPABLE.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: DEVELOP MEANS OF PROMOTING PROPOSED BOOKLET OR LIST OF RESOURCES OF LICENSING/CONTRACTUAL MANUFACTURING TO END USERS. USE NEW PRIVATE LABEL SHOWS AS VEHICLE.

Results Expected: INTRODUCE 10 COMPANIES WITH PRIVATE LABEL CAPABILITIES TO VIABLE USERS.

Export and Investment Promotion Planning System

MISSION: 608 NEW YORK, CONSULATE GENER COUNTRY: 577 UNITED STATES OF AMERICA

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: DEVE'T OF APPAREL SECTION IN WIN EXPORTS.  
ESTAB. PERSONAL CONTACT PROGRAM WITH BUYERS, AGENTS.

Results Expected: EST. 1000 COMPANIES, 500 CANADIANS  
50 BUYERS - 20 AGENTS.

Activity: IDENTIFY AND START TO RESOLVE LOGISTICAL PROBLEMS RELATED TO EXPORTING & SHIPPING APPAREL, E. G. CUSTOMS/BONDING, ETC. TIE-IN WITH NEBS.

Results Expected: ADD SECTION TO MARKETING GUIDE.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 608 NEW YORK, CONSULATE GENERAL

Market: 577 UNITED STATES OF AMERICA

Sector: 013 CONSUMER PRODUCTS

Subsector: 135 FURNITURE &amp; APPLIANCES

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	0.00M	\$ 0.00M	\$ 0.00M	\$ 0.00M
Canadian Exports \$	430.00M	\$ 400.00M	\$ 350.00M	\$ 285.00M
Canadian Share of Import Market	0.00%	0.00%	0.00%	0.00%

## Major Competing Countries

## Market Share

i) 075 CANADA	000 %
ii) 128 GERMANY WEST	000 %
iii) 612 SCANDINAVIA	000 %
iv) 237 ITALY	000 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects

Current Total Imports  
In Canadian \$  
\$ 0.00 M

i) ALL OFFICE FURNITURE

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

i) Project Name: GOVERNMENT OF KUWAIT  
Approximate Value: \$ 300 M  
Financing Source:  
For further info. please contact:  
CNGNY

ii) Project Name: SUMMIT HOTEL, NY  
Approximate Value: \$ 2 M  
Financing Source: 024 BC  
For further info. please contact:  
CNGNY



## Export and Investment Promotion Planning System

MISSION: 608 NEW YORK, CONSULATE GENER COUNTRY: 577 UNITED STATES OF AMERICA

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- No factors reported by mission

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: CONTINUING TO FIND GOOD MANUFACTURERS' REPRESENTATIVES FOR NEW EXPORTERS, & TO MAINTAIN CONTACT WITH THOSE REPRESENTATIVES WHO ARE ALREADY WORKING WITH CANADIAN MFGRS., VISITING 20 LOCAL SHOWROOMS AT LEAST ONCE A QUARTER.

Results Expected: INCREASE THE MARKET FOR OFFICE FURNITURE IN THIS AREA BY APPROXIMATELY 10%.

Activity: INTRODUCE 4 NEW EXPORTERS IN THE CANADA ROOM TO SHOW THEIR NEW PRODUCTS TO THE ARCHITECTURAL, AND INTERIOR DESIGN COMMUNITY.

Results Expected: CREATE A HIGHER PROFILE FOR CDN PRODUCTS BOTH WITH THE SPECIFIER AND THE END-USER.

Activity: MAINTAINING CONTACT WITH THE ARCHITECTURAL & INTERIOR DESIGN TRADE MAGAZINES & WITH "FURNITURE TODAY", THE ONLY WEEKLY FURNITURE NEWSPAPER. THERE ARE 6 IMPORTANT PUBLICATIONS BASED HERE REQUIRING CONTACT EVERY OTHER MONTH.

Results Expected: MUCH BETTER COVERAGE IN THE MAGAZINES & THE NEWSPAPERS FOR NEW CANADIAN PRODUCTS & TRADE SHOWS IN CANADA.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ONGOING PROGRAMS OF INTRODUCING NEW MANUFACTURER'S PRODUCTS, BY VISITING REPRESENTATIVES SHOWROOMS IN THE CITY & AT THE NEW CENTER IN LONG ISLAND CITY, NY.

Results Expected: INCREASE EXPORTS WHICH, IN TURN, WILL HELP TO IMPROVE THE PRODUCTIVITY OF THE CANADIAN INDUSTRY.

Export and Investment Promotion Planning System

MISSION: 608 NEW YORK, CONSULATE GENER COUNTRY: 577 UNITED STATES OF AMERICA

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: FOLLOW-UP ON IDEX, TORONTO, NOVEMBER 1987 BY INTERVIEWING THOSE 20 DESIGNERS WHO WILL BE ATTENDING FOR THE FIRST TIME.

Results Expected: GREATER AWARENESS OF CANADIAN PRODUCTS AND CAPABILITIES WHICH WILL LEAD TO EXPANDED EXPORT SALES.

Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 608 NEW YORK, CONSULATE GENERAL

Country: 577 UNITED STATES OF AMERICA

## Highlights of Investment Environment

Estimated Value Of Equity Investment  
In Canada From This Post Territory:

\$ 0.11 M

Estimated Value Of Annual Direct Equity  
Investments To All Destinations From  
This Post Territory:

\$ 0.13 M

Country Destinations Of Direct  
Equity Investment From Post  
TerritoryEstm. Value  
\$ CDN% Of Annual Direct Equity  
Investment Outflows By  
Category Of Investors

1. 128 GERMANY WEST	\$ 0.34 M	1. Corporations : 67.00 %
2. 075 CANADA	\$ 0.13 M	2. Institutional : 32.00 %
3. 265 JAPAN	\$ 0.86 M	3. Entrepreneurs : 1.00 %
4. 614 SOUTH AMERICA	\$ 0.27 M	4. Immigrant Entr.: 1.00 %

The Mission Has Reported Factors That Tend To Change  
Outward Flows Of Investment From The Post Territory Including:

- Emigration
- Corporate Search For Cheaper Production And/Or Operating Costs  
Outside The Country
- Local Tax And Investment Climate Tends To Discourage Domestic Investment
- Corporate Expansion To Seek New Markets
- Corporate Expansion To Serve Better Existing Markets
- Large Capital Pools Seeking Investment Outlets Abroad (e.g. Oil States)
- Territory Is Host To Active International Capital Market Which Is Focussed  
On International Capital Movements (e.g. N.Y., London, Tokyo)

The Mission Reports That Investors From The Post Territory Who Invest Abroad  
In Manufacturing Tend To Invest In The Following Sector(s) Subsector(s)

## -SECTOR(S)-

1. 012 PETROCHEM & CHEM PROD, EQP, SERV
2. 005 COMM. & INFORM. EQP. & SERV
3. 008 TRANSPORT SYS, EQUIP, COMP, SERV.
4. 007 POWER & ENERGY EQUIP. & SERV.

## -SUBSECTOR(S)-

- 121 CHEM & PETROCHEM PRODUCTS
- 054 COMPUTERS, SOFTWARE & SYSTEMS
- 085 AEROSPACE
- 999 ALL SUB-SECTORS

DATE: 88/01/25

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 608 NEW YORK, CONSULATE GENERAL

Country: 577 UNITED STATES OF AMERICA

#### Equity Propensity Of Key Sources Of Investment From This Territory

Corporations : Start-up Investment To Create New Enterprise (100% Ownership)  
Institutional :  
Entrepreneurs : Start-up Investment To Create New Enterprise (100% Ownership)  
Immigrant Entr.: Start-up Investment To Create New Enterprise (100% Ownership)

#### Sector Preferences By Type Of Key Investors

Corporations : Services  
Institutional : Portfolio Investment  
Entrepreneurs : Services  
Immigrant Entr.: Services

#### Investment Promotion Priority Sectors Sub-Sectors Program Plans And Anticipated Results.

Sector : 006 ELECTRONICS EQUIP. & SERV  
Subsector: 061 PRODUCTS & COMPONENTS

#### Reason(s):

CONCENTRATION OF AEROSPACE & ELECTRONICS FIRMS DEFENSE-RELATED ON  
LONG ISLAND WESTCHESTER COUNTY & NEW JERSEY PLUS HIGH COST OF DOING  
BUS.-TRAFFIC HOUSING COSTS INDICATE GOOD OPPORTUNITIES.

#### Program Plans:

FOCUS WILL SHIFT FROM LARGE SEMINARS TO SMALL TARGETTED SEMINARS BUILT  
AROUND LUNCH BREAKFAST OR SUPPER. WE WILL USE D&B LIST TO SELECT TAR-  
GET COMPANIES AND SET UP SECTORAL MEETING WITH 20-30 PEOPLE.

Anticipated Results: WE EXPECT TO IDENTIFY 10 IMMEDIATE PROS-  
PECTS FOR NEW BUSINESS & 10-15 MEDIUM  
TERM PROSPECTS.

Sector : 014 EDUCATION, MEDICAL, HEALTH PROD  
Subsector: 141 PHARMACEUTICALS, BIOTECHNOLOGY

#### Reason(s):

NEW JERSEY IS THE LARGEST OF PHARMACEUTICALS & MAJOR CENTER FOR IN-  
DUSTRY IN THE US. INVESTMENT CLIMATE WILL IMPROVE WITH FREE TRADE &  
CHANGES IN COMPULSORY LICENSING.

DATE: 88/01/25

DEPARTMENT OF EXTERNAL AFFAIRS

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 608 NEW YORK, CONSULATE GENERAL

Country: 577 UNITED STATES OF AMERICA

Investment Promotion Priority Sectors Sub-Sectors  
Program Plans And Anticipated Results.

Sector : 014 EDUCATION, MEDICAL, HEALTH PROD  
Subsector: 141 PHARMACEUTICALS, BIOTECHNOLOGY

Program Plans:

FOCUS WILL SHIFT TO IDENTIFYING TRADE ASSOCIATION OR BUSINESS ASSOCIATION IN THIS SECTOR IN SPECIFIC GEOGRAPHIC AREAS TO DEVELOP TARGET LISTS AND THEN PLAN TO HOLD SMALL SEMINARS BUILT AROUND LUNCH OR SUPPER.

Anticipated Results: WE EXPECT TO IDENTIFY 5 IMMEDIATE PROSPECTS FOR NEW BUSINESS & 10-12 MEDIUM TERM PROSPECTS.

Sector : 008 TRANSPORT SYS, EQUIP, COMP, SERV.  
Subsector: 085 AEROSPACE

Reason(s):

SIGNIFICANT NUMBER OF AEROSPACE COMPANIES IN TERRITORY-LONG ISLAND & CONNECTICUT HAVE LARGE CONCENTRATION OF AEROSPACE CORPORATIONS.

Program Plans:

LONG ISLAND & CONNECTICUT HAVE LARGE AEROSPACE BASE - WE WILL BUILD ON EXISTING EFFORTS & HOLD A SERIES OF LUNCHEON BREAKFAST/SUPPER SEMINARS IN 88-89 FOR THIS SECTION.

Anticipated Results: WE EXPECT TO IDENTIFY 10 IMMEDIATE PROSPECTS FOR NEW BUSINESS & 10-12 MEDIUM TERM PROSPECTS.

Sector : 005 COMM. & INFORM. EQP. & SERV  
Subsector: 051 REMOTE SENSING

Reason(s):

OPPORTUNITIES TO TIE INTO CURRENT ELECTRONICS/HIGH TECHNOLOGY MARKETING PLACES - SECTORS GIVEN PRIORITY IN DIRECT MAIL PROGRAMME.

DATE: 88/01/25

DEPARTMENT OF EXTERNAL AFFAIRS

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 608 NEW YORK, CONSULATE GENERAL

Country: 577 UNITED STATES OF AMERICA

Investment Promotion Priority Sectors Sub-Sectors  
Program Plans And Actipicipated Results.

Sector : 005 COMM. & INFORM. EQP. & SERV

Subsector: 051 REMOTE SENSING

Program Plans:

IMPLEMENTATION OF D&B LISTS TO SELECT TARGET COMPANIES BY MAIL PHONE  
AND PERSONAL VISITS AND MEETINGS - LUNCHEON.

Anticipated Results: WE EXPECT TO IDENTIFY 3 IMMEDIATE PROS-  
PECTS FOR NEW BUSINESS & 5-8 MEDIUM  
TERM PROSPECTS.

Sector : 012 PETROCHEM & CHEM PROD, EQP, SERV

Subsector: 999 ALL SUB-SECTORS

Reason(s):

NUMBER OF MAJOR PETROCHEMICAL COMPANIES HAVE HEAD OFFICES IN NY. NJ  
HAS NUMBER OF FIRMS IN SPECIALTY CHEMICALS - DUE TO BASIC NEEDS TO BE  
REFERRED.

Program Plans:

PROGRAM TO IDENTIFY SUPPLIERS TO MAJOR PETROCHEMICAL & CHEMICAL  
CORPORATIONS WHO ARE CURRENTLY IN CANADA TO BE DEVELOPED.

Anticipated Results: TO IDENTIFY 2 IMMEDIATE PROSPECTS AND 3  
MEDIUM TERM PROSPECTS.

Sector : 008 TRANSPORT SYS, EQUIP, COMP, SERV.

Subsector: 081 AUTOMOTIVE

Reason(s):

SIGNIFICANT NUMBER OF AUTO RELATED COMPANIES - NEED TO IDENTIFY  
POTENTIALS MORE SPECIFICALLY.

DATE: 88/01/25

DEPARTMENT OF EXTERNAL AFFAIRS

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 608 NEW YORK, CONSULATE GENERAL

Country: 577 UNITED STATES OF AMERICA

Investment Promotion Priority Sectors Sub-Sectors  
Program Plans And Actipicipated Results.

Sector : 008 TRANSPORT SYS,EQUIP,COMP,SERV.  
Subsector: 081 AUTOMOTIVE

Program Plans:

SMALL TARGET SEMINARS BUILT AROUND LUNCH OR SUPPER WILL BE SET UP TO DISCUSS AUTOMOTIVE ORIENTED OPPORTUNITIES IN CANADA - WILL TARGET SUPPLIERS TO CANADIAN AUTOMAKERS.

Anticipated Results: TO IDENTIFY 5 IMMEDIATE PROSPECTS AND 10 MEDIUM TERM PROSPECTS.

Other Investment Program Plans

Activity(ies):

CORPORATE LIAISON - PRIVATE LUNCHEONS FOR SELECTION CEOS CFOS COOS WITH PM CALLS ON SENIOR EXECUTIVES IN 15 MAJOR CORPORATIONS; USE OF DIRECT MAIL AS PER MARKETING PLAN SUBMITTED FY 87-88. SERIES OF LUNCHEONS/SUPPERS WITH CEOS USING SEMINAR FORMAT.

Anticipated Results: DEVELOP & ENHANCE POSITIVE VIEWS TOWARD CDA BY SENIOR EXECUTIVES & DEVELOP & CLOSE 10 PROSPECTS.

Activity(ies):

INSTITUTIONAL INVESTORS: PLAN ONE MAJOR EVENT FOR INSTITUTIONAL INVESTORS IN NY. ONE IN HARTFORD & 1 MISSION TO OTT. IN FALL 88. SPEICAL EMPHASIS ON LARGE NUMBER OF JAPANESE FINANCIAL INSTITUTIONS.

Anticipated Results: THESE EVENTS WILL EXPAND CONTACTS WITH INSTITUTIONAL INVESTORS & INCREASE THEIR INTEREST IN CDA. ALSO IMPROVED FOLLOWUP WILL HELP IDENTIFY SPECIFIC INTEREST.

DATE: 88/01/25

DEPARTMENT OF EXTERNAL AFFAIRS

PAGE: 240

Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 608 NEW YORK, CONSULATE GENERAL

Country: 577 UNITED STATES OF AMERICA

**Other Investment Program Plans**

**Activity(ies):**

VENTURE CAPITAL DATA BASE TO BE BUILT AND MATCHED WITH INVESTMENT OPPORTUNITIES IN CANADA.

**Anticipated Results:** IDENTIFY AT LEAST 10 VENTURE CAPITAL CORPORATIONS WHO WOULD BE WILLING TO INVEST IN CANADIAN OPPORTUNITY.



Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 608 NEW YORK, CONSULATE GENERAL		
Sector: 013 CONSUMER PRODUCTS		
010 FAIRS		
PRIVATE LABEL SHOW BY NAMSB	NEW YORK	0689
PRET SPORTIF	NEW YORK	1089
PRIVATE LABEL SHOW BY NKSA	NEW YORK	0889

## Export and Investment Promotion Planning System

## 88/89 Trade and Economic Overview

Mission: 610 SAN FRANCISCO

Country: 577 UNITED STATES OF AMERICA

CALIFORNIA, A KEY ARENA FOR PURSUING CDN INTERESTS, HAS THE GREATEST POPULATION AND MOST DIVERSIFIED ECONOMY IN THE TERRITORY. CLAIMING TO HAVE THE 6TH LARGEST WORLD ECONOMY, IT IS AMERICA'S LEADING IMPORT-EXPORT STATE WITH A POPULATION AND ECONOMY ROUGHLY EQUALLING CDA'S. RECORD HOUSING STARTS AND STRONG CONSUMER SPENDING CONTRIBUTED TO SURPRISINGLY STRONG ECONOMIC GROWTH FOR THE FIRST HALF OF '87. HOWEVER, ANTICIPATED HIGHER INTEREST RATES AND LOWER REAL INCOME GROWTH WILL MODERATE THIS GROWTH IN 87 & 88. RESULTING DECLINES IN CONSTRUCTION ACTIVITY & SLOW DOWNS IN OTHER KEY SECTORS WILL LIKELY KEEP UNEMPLOYMENT AND INFLATION RATES AT ABOUT 5.8% & 4.9% RESPECTIVELY IN '88. CALIFORNIA'S AGRICULTURAL IND. IS CONSIDERED BETTER OFF AS THINGS "DIDN'T GET WORSE". STRONG PRODUCTION, LIMITED DEMAND AND LOW COMMODITY PRICES STILL AFFECT THIS SECTOR'S STABILITY. THE U.S. DEFENCE BUDGET WILL NOT EXPERIENCE THE MAJOR INCREASES OF THE PAST FIVE YEARS; SLIGHT DECREASES IN CAPITAL PROCUREMENT MAY ALSO MATERIALIZE DUE TO THE IMPACT OF GRAMM-RUDMAN ON BUDGET DEFICITS. WHILE THIS TREND COULD HAVE A DIRECT EFFECT ON CDA'S EXPORT POTENTIAL, AGGRESSIVE MKTG & THE CDN \$ VALUE WILL DETERMINE CDA'S MKT SHARE. SILICON VALLEY CONTINUES AS A BRIGHT SPOT FOR DEFENCE ELECTRONICS & COMPUTER RELATED ACTIVITY. THE COMPUTER SOFTWARE MARKET IS CONTINUING ITS RAPID INCREASE. POTENTIAL NEW FED. FUNDS FOR URBAN TRANSPORT PROJS WILL INCREASE BIDDING OPPORTUNITIES ON HIGH-RAIL SYSTEMS & BUS PURCHASE. CALIFORNIA'S ENERGY MKT REMAINS FAIRLY STABLE. CDN & U.S. REGULATORY DECISIONS HAVE AFFECTED PRICES & CONTRIBUTED TO TRANSPORT'N PROBLEMS; WHILE AWAITING REMEDIES, MKTG CONTINUES AS "THE NAME OF THE GAME" FOR PRODUCERS. CDN EXPORT POTEN'L SHLD IMPROVE AS U.S. NATURAL GAS DEMAND STABILIZES & SURPLUS DELIVERABILITY IS GRADUALLY ABSORBED. CDN IND. CAPABILITY TO OFFER LONGTERM ARRANGEMENTS WILL BE AN IMPORTANT FACTOR AS U.S. DISTRIBUTORS TAKE ADVANTAGE OF CONTRACT DEMAND REDUCTION PROVISIONS THAT ALLOW CONTRACTING DIRECTLY WITH PRODUCERS FOR SUPPLY. WITH PERSONAL INCOME EXPECTED TO INCREASE 7.7% NEXT YEAR, CONSUMER PURCHASES OF HIGH QUALITY, WELL-DESIGNED AND CUSTOMER-SERVICED PRODS ARE EXPECTED TO GROW PROPORTIONATELY. HIGH VACANCY RATES WILL CONTINUE TO ADVERSELY AFFECT COMMERCIAL CONSTRUCTION. BILATERAL TRADE & INVSTMT FACE INCREASING COMPETITION FM THE GROWTH OF STATE PROMO'L PROGRAMMES BOTH NATIONALLY & INTERNATIONALLY, MUCH OF WHICH ARE DIRECTED AT THE PACIFIC RIM. THE ROCKY MOUNTAIN RGN CONTINUES TO REFLECT THE WEAKNESSES OF THE AGRICULTURE & RESOURCE IND., ALTHOUGH UTAH, NEVADA & COLORADO HAVE NOTEWORTHY PROSPECTS FOR NEW GROWTH IN COS & JOBS. WYOMING IS ALSO BENEFITING FM THE PETRO. IND.'S CAUTIOUS REVIVAL. FED'L GOVT INVSTMTS & EXPENDITURES REMAIN PARTICULARLY IMPORTANT TO THESE STATES. HAWAII'S 87 TOURIST SEASON SUCCESSFULLY CONTINUES AS DO THE BENEFITS FM LOW OIL PRICES. DEF. SPENDING SHLD REMAIN

## Export and Investment Promotion Planning System

REPT: SYN-GEO 88/89 A. Post export program priorities

Region: UNITED STATES

Mission: 610 SAN FRANCISCO

Market: 577 UNITED STATES OF AMERICA

The Mission selected the following sectors as priority areas for export promotion activities for the coming fiscal year:

## 1. 005 COMM. &amp; INFORM. EQP. &amp; SERV

REASONS: CDN CAPABILITY RAPIDLY IMPROVING. RAPID EXPNSN IN COMPUTER SOFTWARE MKT W/IN SPECIFIC VERTICAL MKTS & IN N. CAL'S INFO. SECTOR OVER PAST 12 MTHS. SECTOR SHLD STABILIZE OVER NEXT 6 MTHS. & THEN RESUME GROWTH.

## 2. 006 ELECTRONICS EQUIP. &amp; SERV

REASONS: DRAMATIC INCREASES IN CDN CAPABILITY IN HIGH TECH ELECTRONICS SECTOR COMPLIMENTS 20% CDN IND. GROWTH OVER LAS 3 YRS. SILICON VALLEY REMAINS CENTRE FOR SECTOR R&D & OFFERS POTEN'L FOR COST COMPETITIVE GDS BACKED

## 3. 004 DEFENCE PROGRAMS, PRODUCTS, SERV

REASONS: A GROWTH SECTOR OVER PAST FIVE YRS. , SOME UNCERTAINTY AS TO FUTURE GROWTH EXISTS. SUB-CONTRACTING OPPS CONTINUE, W/SPENDING REDUCTIONS IMPACTING ON NUMBER & SIZE OF N. CAL. CONTRACTS LET IN SUCH SUB-SECTORS

## 4. 008 TRANSPORT SYS, EQUIP, COMP, SERV.

REASONS: FED. FUNDING REDUC'NS WILL IMPACT ON PURCHASES, BIDDING OPPS ON MAJOR PROJS EXIST. HONOLULU & SALT LAKE CITY, AWAITING FED. FUNDING, OFFER \$1B IN LIGHT RAIL SYS. OVER NEXT 18 MTHS, BAY AREA TRANSIT AUTHORIT.

## 5. 013 CONSUMER PRODUCTS

REASONS: MKT SIZE/VOLUME PRESENT OPPS IN VARIETY OF PRODS, INCL CONTRACT FURN., FALL MKT FASHION WEAR, & MED. DEVICES & AUXILIARY PRODS FOR HEALTH CARE MKT. SALES PERSEVERANCE, QUALITY AND DESIGN REMAIN KEY.

## 6. 001 AGRI &amp; FOOD PRODUCTS &amp; SERVICE

REASONS: ON SHEER MAGNITUDE, EXPORT POTEN'L REMAINS EXCELLENT. A HIGHLY COMPETITIVE MKT, OPPS EXIST FOR CAPABLE, DETERMINED SUPPLIERS OF QUALITY, COMPETITIVELY PRICES/PACKAGED, AND/OR INNOVATIVE PRODUCTS.

The most important current Canadian export sectors to this market are (based on actual export sales):

1. 011 OIL & GAS EQUIPMENT, SERVICES
2. 009 FOREST PRODUCTS, EQUIP, SERVICES
3. 008 TRANSPORT SYS, EQUIP, COMP, SERV.
4. 005 COMM. & INFORM. EQP. & SERV
5. 009 FOREST PRODUCTS, EQUIP, SERVICES

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 610 SAN FRANCISCO

Market: 577 UNITED STATES OF AMERICA

Sector: 001 AGRI &amp; FOOD PRODUCTS &amp; SERVICE

Subsector: 015 SEMI &amp; PROCESSED FOOD &amp; DRINK

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	15000.00M	\$13900.00M	\$13500.00M	\$12250.00M
Canadian Exports \$	180.00M	\$ 160.00M	\$ 140.00M	\$ 135.00M
Canadian Share of Import Market	2.00%	2.00%	1.00%	1.00%

## Major Competing Countries

## Market Share

- |                                 |       |
|---------------------------------|-------|
| i) 577 UNITED STATES OF AMERICA | 000 % |
| ii) 608 WEST EUROPE             | 000 % |

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) RETAIL MARKET - SEMI PROCESSED & PROCESSED FOOD	\$ 0.00 M
ii) INSTITUTIONAL MARKET -SEMI PROCESSED & PROC. FOOD	\$ 0.00 M
iii) MEAT & MEAT BY PRODUCTS PORK AND BEEF	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- other factor(s) described by the Trade Office as follows:

HIGH FREIGHT COSTS AND TOO SMALL/CANADIAN PRODUCTION CAPABILITIES

## Export and Investment Promotion Planning System

MISSION: 610 SAN FRANCISCO

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: VISIT MAJOR HOTEL CHAINS IN TERRITORY TO DISCUSS CANADA FOOD FAIR PRESENTATIONS & WITH CANADIAN INDUSTRY & SALES REPRESENTATIVES ON POSSIBLE NEW ADVERTISING OPPORTUNITIES DEVELOPED IN CONNECTION WITH FOOD FAIRS.

Results Expected: DEVELOP NEW BUSINESS LEADS & CONTACTS AND INCREASE AMERICAN AWARENESS/UNDERSTANDING OF CDN SELECTION AND QUALITY.

Activity: SUPPORT PROVINCIAL GOVERNMENT AND INDUSTRY EFFORTS TO PENETRATE THE BEEF MARKET THROUGH BEEF DEMONSTRATION TRIALS IN TERRITORY.

Results Expected: GRADUALLY INCREASE MARKET PENETRATION, PARTICULARLY IN SELECTED BEEF CUTS.

Activity: WORK WITH CDN PROCESSED FOOD INDUSTRY TO IDENTIFY NEW MARKET NICHES FOR HIGH QUALITY, INNOVATE AND COMPETITIVELY PACKAGED/PRICED FOOD PRODUCTS AND SUPPORT FOOD PACIFIC '88 VISITS PROGRAMME.

Results Expected: INCREASE FOOD SALES BY MINIMUM OF 10% AND DEVELOP POTENTIAL NEW BUSINESS OPPORTUNITIES.

Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 610 SAN FRANCISCO

Market: 577 UNITED STATES OF AMERICA

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Subsector: 043 ELECTRICAL & ELECTRONIC

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	500.00M	\$ 400.00M	\$ 350.00M	\$ 250.00M
Canadian Exports \$	400.00M	\$ 250.00M	\$ 150.00M	\$ 150.00M
Canadian Share of Import Market	80.00%	63.00%	56.00%	60.00%

Major Competing Countries	Market Share
i) 577 UNITED STATES OF AMERICA	090 %
ii) 051 UNITED KINGDOM	010 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) PRINTED CIRCUIT BOARDS	\$ 20.00 M
ii) SOFTWARE	\$ 10.00 M
iii) SYSTEMS (EW)	\$ 50.00 M
iv) SATELLITE TECH.	\$ 20.00 M
v) ELECTRO OPTICS	\$ 10.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be moderate
- approval of technical standards can present problems in the case of some imported products

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- the apparent limited sectoral capability in Canada compared to other competing export countries
- non-tariff protectionist measures which are difficult to overcome
- other factor(s) described by the Trade Office as follows:

IT IS EXTREMELY DIFFICULT TO BID COMPETITIVELY ON US GOVERNMENT DEFENCE ELECTRONICS CONTRACTS EVEN WITH DEFENCE PRODUCTION SHARING AGREEMENT. COMPANIES HAVE TO BE PATIENT AND AGGRESSIVE.

## Export and Investment Promotion Planning System

MISSION: 610 SAN FRANCISCO

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- competitive export pricing for this market

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: DEVELOP BETTER CONTACTS WITH BUYERS AT LARGE. US DEFENCE ELECTRONICS CONTRACTORS IE LOCKHEED, FORD, AVANTEK AND APPLIED TECHNOLOGY.

Results Expected: WITH BETTER UNDERSTANDING OF LARGE AND CONFIRMING BUYER NETWORK, POST CAN BETTER ASSIST CANADIAN EXPORTERS.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: WORK CLOSELY WITH THESE CANADIAN FIRMS WHICH HAVE EXPRESSED AN INTEREST IN NORTHERN CALIFORNIA DEFENCE ELECTRONICS MARKET BY ATTENDING MICROWAVE/MILLIMETER AND ELECTRO-OPTICS PRESENTATIONS.

Results Expected: THESE COMPANIES HAVE BEEN INTRODUCED TO MARKET AND FOLLOW-UP WILL BE ESSENTIAL TO THEIR SUCCESS IN WINNING LOCAL BIDS.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 610 SAN FRANCISCO

Market: 577 UNITED STATES OF AMERICA

Sector: 005 COMM. &amp; INFORM. EQP. &amp; SERV

Subsector: 053 TELECOMMUNICATIONS (INC SPACE)

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1000.00M	\$ 950.00M	\$ 820.00M	\$ 750.00M
Canadian Exports \$	250.00M	\$ 200.00M	\$ 175.00M	\$ 160.00M
Canadian Share of Import Market	25.00%	21.00%	20.00%	20.00%

## Major Competing Countries

## Market Share

i) 265 JAPAN	015 %
ii) 128 GERMANY WEST	010 %
iii) 577 UNITED STATES OF AMERICA	060 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) TELECOM PRODUCTS	\$ 100.00 M
ii) TEST EQUIPMENT	\$ 25.00 M
iii) COMPONENTS	\$ 50.00 M
iv) SATELLITE PRODUCTS	\$ 40.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- No factors reported by mission

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade fairs
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada



## Export and Investment Promotion Planning System

MISSION: 610 SAN FRANCISCO

COUNTRY: 577 UNITED STATES OF AMERICA

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: FOLLOW-UP WITH LOCAL FIRMS WHICH ATTENDED MICROWAVE/MILLIMETER PRESENTATION. OPPORTUNITIES EXISTS IN COMMERCIAL SATELLITE MARKETS

Results Expected: FIND POSSIBLE CONTRACTS FOR CANADIAN COMPANIES.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: PROMOTE CANADIAN CAPABILITIES WITH LARGE LOCAL TELECOMMUNICATIONS COMPANIES FOR CONSIDERATION AS ALTERNATIVE SOURCE FOR COMPONENTS.

Results Expected: INCREASE AWARENESS OF CANADIAN STRENGTHS IN TELECOM INDUSTRY.

Activity: PROMOTE RECENT CANADIAN DEVELOPMENTS IN THE AREA OF DIGITAL SWITCHING AND INTEGRATED SERVICES DIGITAL NETWORKS (ISDN)

Results Expected: ISDN IS IMPORTANT TECHNOLOGICAL DEVELOPMENT WHICH WILL PROVIDE NUMEROUS MARKET OPPORTUNITIES.

Activity: DEVELOP MARKETING ARRANGEMENTS WITH LOCAL FIRMS TO ASSIST CANADIAN COMPANIES IN SECURING PROPER SALES AND DISTRIBUTIONS NETWORKS.

Results Expected: REDUCE THE COST OF CLOSING BUSINESS IN CALIFORNIA BY PROVIDING STRATEGIC ALLIANCES WITH COMPLIMENTARY LOCAL COMPANIES.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 610 SAN FRANCISCO

Market: 577 UNITED STATES OF AMERICA

Sector: 005 COMM. &amp; INFORM. EQP. &amp; SERV

Subsector: 054 COMPUTERS, SOFTWARE &amp; SYSTEMS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	5000.00M	\$ 4000.00M	\$ 3000.00M	\$ 2500.00M
Canadian Exports \$	100.00M	\$ 80.00M	\$ 65.00M	\$ 55.00M
Canadian Share of Import Market	2.00%	2.00%	2.00%	2.00%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	080 %
ii) 265 JAPAN	010 %
iii) 620 EUROPE	005 %
iv) 268 KOREA	002 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are  
good market prospects

## Current Total Imports

	In Canadian \$
i) COMPUTER PERIPHERALS	\$ 10.00 M
ii) MONITORS	\$ 40.00 M
iii) POWER SUPPLIES	\$ 15.00 M
iv) ENCLOSURES	\$ 5.00 M
v) HARDWARE	\$ 10.00 M

The Trade Office reports that the following factors influence Canadian  
export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low
- approval of technical standards can present problems in the case of some imported products

## Export and Investment Promotion Planning System

MISSION: 610 SAN FRANCISCO

COUNTRY: 577 UNITED STATES OF AMERICA

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- the unsuitability of Canadian products for this market
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade fairs
- competitive export pricing for this market

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: CONTINUED QUALIFICATION OF LOCAL REPS TO ASSIST CANADIAN FIRMS.

Results Expected: WITH MORE LOCAL REPS AWARE OF CANADIAN FIRMS, THERE WILL BE MORE LOCAL EXPOSURE FOR CDN PRODUCTS.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: MEET WITH PROCUREMENT OFFICIALS OF MAJOR COMPUTER MANUFACTURERS IN SILICON VALLEY.

Results Expected: DEVELOP UNDERSTANDING OF SOURCING OPPORTUNITIES FOR CANADIAN FIRMS.

Activity: DISCUSS SOURCING OPPORTUNITIES FOR CANADIAN FIRMS WITH CANADIAN SUBS. OF LARGE LOCAL MANUFACTURERS.

Results Expected: INITIATE DIALOGUE BETWEEN CANADIAN SIDE AND HEADQUARTER OPERATIONS OF NEED TO INCLUDE CANADIAN COMPANIES IN COMPETITIVE BIDDING PROCESS.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 610 SAN FRANCISCO

Market: 577 UNITED STATES OF AMERICA

Sector: 008 TRANSPORT SYS, EQUIP, COMP, SERV.

Subsector: 082 URBAN TRANSIT

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	400.00M	\$ 200.00M	\$ 100.00M	\$ 100.00M
Canadian Exports \$	200.00M	\$ 50.00M	\$ 25.00M	\$ 25.00M
Canadian Share of Import Market	50.00%	25.00%	25.00%	25.00%

## Major Competing Countries

## Market Share

i) 112 FRANCE	015 %
ii) 128 GERMANY WEST	015 %
iii) 265 JAPAN	015 %
iv) 507 SWEDEN	010 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are  
good market prospects

## Current Total Imports

	In Canadian \$
i) BUSES	\$ 80.00 M
ii) COMPONENTS	\$ 100.00 M
iii) LIGHT RAIL VEHICLES	\$ 400.00 M
iv) CONSULTANTS	\$ 100.00 M

Projects or portion of projects which are still in the planning  
stage and for which Canadian companies might have reasonable prospects.

i) Project Name: BART EXTENSION TO SFO  
Approximate Value: \$ 500 M  
Financing Source: 012 DDM  
For further info. please contact:  
P. DONOHUE (415/ 981-2670)

## Export and Investment Promotion Planning System

MISSION: 610 SAN FRANCISCO

COUNTRY: 577 UNITED STATES OF AMERICA

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- there are import restrictions which can present significant problems
- the degree of import duty protection of local industry tends to be high

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- non-tariff protectionist measures which are difficult to overcome
- other factor(s) described by the Trade Office as follows:

CANADIANS HAVE TO CONTEND WITH STAA AND BUY AMERICA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada
- the availability of competitive Canadian financing

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: FOLLOW-UP ON RECENT HAWAIIAN URBAN TRANSIT MISSION TO VANCOUVER.

Results Expected: HONOLULU IS SERIOUSLY CONSIDERING PURCHASE IN NEXT 18-24 MONTHS OF US\$850 M ADVANCED LIGHT RAIL SYSTEM.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: MEET WITH URBAN TRANSIT OFFICIALS IN SALT LAKE CITY TO DETERMINE THEIR SHORT RANGE PLANS FOR URBAN TRANSIT SYSTEM.

Results Expected: DEVELOP CLOSER TIES WITH CITY OFFICIALS AND ASSIST CANADIAN EXPORTERS WITH THEIR MARKETING OF LIGHT RAIL SYSTEMS.

Export and Investment Promotion Planning System

MISSION: 610 SAN FRANCISCO

COUNTRY: 577 UNITED STATES OF AMERICA

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: MEET WITH URBAN TRANSIT OFFICIALS FROM ALAMEDA COUNTY TO DISCUSS THEIR PLANS FOR 1/2 CENT GAS TAX EXPENDITURES.

Results Expected: ALAMEDA IS CONSIDERING LIGHT RAIL ALTERNATIVE TO BART EXTENSION. INFORMATION ON CANADIAN CAPABILITIES MAY IMPACT ON DECISION MAKING AT THE EARLY STAGES.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 610 SAN FRANCISCO

Market: 577 UNITED STATES OF AMERICA

Sector: 013 CONSUMER PRODUCTS

Subsector: 131 APPAREL (CLOTH, FUR, SHOES) TEXT

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	36.00M	\$ 35.50M	\$ 35.00M	\$ 35.00M
Canadian Exports \$	5.75M	\$ 5.25M	\$ 5.00M	\$ 4.50M
Canadian Share of Import Market	16.00%	15.00%	14.00%	12.00%

## Major Competing Countries

## Market Share

i) 189 HONG KONG	005 %
ii) 192 PEOPLE'S REP OF CHINA	004 %
iii) 268 KOREA	004 %
iv) 605 ASIA OR FAR EAST	003 %
v) 613 CENTRAL AMERICA	002 %
vi) 620 EUROPE	002 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 15-30 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) WOMEN'S HIGH END FASHION	\$ 0.00 M
ii) WOMEN'S/MEN'S HIGH END LEATHERS	\$ 0.00 M
iii) WOMEN'S HIGH END SUITS, ENSEMBLES (FALLWEAR)	\$ 0.00 M
iv) CASUALWEAR SEPARATES	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- other factor(s) described by the Trade Office as follows:

WARM CLIMATE LIMITS SEASONAL ACTIVITY-BEST IS FALL FASHIONS. SAN FRANCISCO MARKET IN LAST 10 YEARS HAS DECLINED. RECENT MART ACTIVITY TO REGAIN POSITION AS EXCELLENT SECONDARY MARKET OFFERS POTENTIAL FOR CDN EXPORT TO AREA, WHICH RECENTLY SERV. BY NY & LA

## Export and Investment Promotion Planning System

MISSION: 610 SAN FRANCISCO

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- competitive export pricing for this market

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: FOLLOW-UP WITH SAN FRANCISCO APPAREL MARKET AND CANADIAN EXHIBITORS ON POSSIBILITY OF SIMILAR FOCUS PROMOTION OF FALL FASHION WEAR FOR MARCH 89 PREVIEW MARKET WEEK.

Results Expected: TO STRENGTHEN CDA SMALL, BUT WITH POTENTIAL TO GROW, SHARE OF MARKET & ENCOURAGE CDN DESIGNERS TO MARKET ON A CONTINUED BASIS.



## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 610 SAN FRANCISCO

Market: 577 UNITED STATES OF AMERICA

Sector: 013 CONSUMER PRODUCTS

Subsector: 135 FURNITURE &amp; APPLIANCES

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1300.00M	\$ 1200.00M	\$ 1100.00M	\$ 1100.00M
Canadian Exports \$	90.00M	\$ 80.40M	\$ 70.00M	\$ 65.00M
Canadian Share of Import Market	7.00%	6.70%	6.30%	5.90%

## Major Competing Countries

## Market Share

i) 237 ITALY	000 %
ii) 577 UNITED STATES OF AMERICA	000 %
iii) 128 GERMANY WEST	000 %
iv) 612 SCANDINAVIA	000 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) INSTITUTIONAL/HOSPITALITY FURNITURE	\$ 0.00 M
ii) PUBLIC SPACES FURNITURE	\$ 0.00 M
iii) HOTEL/MOTEL FURNITURE	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- other factor(s) described by the Trade Office as follows:

BETTER FREIGHT RATES, I.E. CONSOLIDATION CHANNELS NEEDED TO MAKE TRANSPORTATION FROM EAST TO WEST MORE ECONOMICALLY FEASIBLE.

## Export and Investment Promotion Planning System

MISSION: 610 SAN FRANCISCO

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- competitive export pricing for this market

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: MEET W/MAJOR INT'L ARCHITECTURAL DESIGN FIRMS IN TERRITORY TO UPDATE ON MARKET DIRECTIONS.

Results Expected: OFFER CURRENT INFORMATION TO CDN EXPORTS ON CHOICE OF PRODUCTS APPROPRIATE TO MARKET SECTOR.

Activity: VISIT INDUSTRY MARKET EXHIBITIONS AND PROMOTIONS TO IDENTIFY NEW SALES REPRESENTATIVES AND ACCESS NEW AVENUES FOR MARKETING CANADIAN CAPABILITIES.

Results Expected: TO IDENTIFY POSSIBLE NEW MARKET NICHEs, TRADE FAIRS AND INTEREST US REPS IN CANADIAN PRODUCTS.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 610 SAN FRANCISCO

Market: 577 UNITED STATES OF AMERICA

Sector: 014 EDUCATION, MEDICAL, HEALTH PROD

Subsector: 142 HOSP. &amp; MEDICAL EQUIP, INSTRUM.

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	825.00M	\$ 800.00M	\$ 740.00M	\$ 671.00M
Canadian Exports \$	6.50M	\$ 5.00M	\$ 3.50M	\$ 1.80M
Canadian Share of Import Market	8.00%	6.00%	5.00%	3.00%

## Major Competing Countries

## Market Share

i) 051 UNITED KINGDOM	000 %
ii) 128 GERMANY WEST	000 %
iii) 265 JAPAN	000 %
iv) 577 UNITED STATES OF AMERICA	000 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 15-30 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) SPECIALTY HOSPITAL/INSTUTIONAL/ADMIN. SYSTEMS	\$ 0.00 M
ii) HOME HEALTHCARE	\$ 0.00 M
iii) X-RAY ELECTRO MEDICAL	\$ 0.00 M
iv) SURGICAL & ORTH.	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

## Export and Investment Promotion Planning System

MISSION: 610 SAN FRANCISCO

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- use of provincial governments export promotion activities
- competitive export pricing for this market

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: UPDATE THROUGH BUYERS EXPORT OPPORTUNITIES FOR CDN MEDICAL DEVICES & AUXILIARY PRODUCTS SUCH AS INSTITUTIONAL & PATIENT RELATED FURNITURE AS MARKET NOT YET AFFECTED BY OVER COMPETITION/SATURATION.

Results Expected: TO DISCUSS/ASCERTAIN MARKET OPPORTUNITIES & TRANSMIT THESE TO CDN SUPPLIERS, AND TO STIMULATE TRADE ENQUIRIES (IN THIS HIGH PROFIT MARGING SECTOR).

Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 610 SAN FRANCISCO

Country: 577 UNITED STATES OF AMERICA

## Highlights of Investment Environment

Estimated Value Of Equity Investment  
In Canada From This Post Territory:

\$ 20 000.00 M

Estimated Value Of Annual Direct Equity  
Investments To All Destinations From  
This Post Territory:

\$ 5 000.00 M

Country Destinations Of Direct  
Equity Investment From Post  
TerritoryEstm. Value  
\$ CDN% Of Annual Direct Equity  
Investment Outflows By  
Category Of Investors

1. 268 KOREA	\$ 10 000.00 M	1. Corporations : 60.00 %
2. 075 CANADA	\$ 5 000.00 M	2. Institutional : 25.00 %
3. 620 EUROPE	\$ 2 500.00 M	3. Entrepreneurs : 10.00 %
4.	\$ M	4. Immigrant Entr.: 5.00 %

The Mission Has Reported Factors That Tend To Change  
Outward Flows Of Investment From The Post Territory Including:

- Corporate Search For Cheaper Production And/Or Operating Costs  
Outside The Country
- Corporate Expansion To Seek New Markets
- Corporate Expansion To Serve Better Existing Markets

The Mission Reports That Investors From The Post Territory Who Invest Abroad  
In Manufacturing Tend To Invest In The Following Sector(s) Subsector(s)

## -SECTOR(S)-

## -SUBSECTOR(S)-

1. 005 COMM. & INFORM. EQP. & SERV
2. 004 DEFENCE PROGRAMS, PRODUCTS, SERV
3. 006 ELECTRONICS EQUIP. & SERV
4. 014 EDUCATION, MEDICAL, HEALTH PROD

DATE: 88/01/25

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 610 SAN FRANCISCO

Country: 577 UNITED STATES OF AMERICA

#### Equity Propensity Of Key Sources Of Investment From This Territory

Corporations : Start-up Investment To Create New Enterprise (On A Joint Basis)  
Institutional :  
Entrepreneurs : Partial Ownership Of Existing Corporate Facilities With Direct  
Involvement In Day-to-Day Operations  
Immigrant Entr. :

#### Sector Preferences By Type Of Key Investors

Corporations :  
Institutional : Portfolio Investment  
Entrepreneurs : Services  
Immigrant Entr. : Services

#### Investment Promotion Priority Sectors Sub-Sectors Program Plans And Anticipated Results.

Sector : 005 COMM. & INFORM. EQP. & SERV  
Subsector: 054 COMPUTERS, SOFTWARE & SYSTEMS

#### Reason(s):

SILICON VALLEY IS THE HOME OF OVER 2900 COS INVOLVED IN THE ELECTRONICS IND. STATE OF THE ART R&D IS CONDUCTED IN THE AREA WITH HEAVY START-UP & HIGH GROWTH FIRMS SEEKING OPPS OUTSIDE OF THE GEO. REGION.

#### Program Plans:

CONTINUE CORPORATE LIAISON PROG. & VISIT WITH MAJOR MANUFACTURERS OF COMPUTER & COMPUTER PERIPHERAL PRODS. CONTINUE COOPERATION WITH DRIE/OTT AND OUTLINE TO REGION FIRMS THE ADVANTAGES OF BECOMING "NATIONALIZED" CDN COMPANIES.

Anticipated Results: POST TO VISIT 25 OF 150 FIRMS INVOLVED IN SECTOR TO WORK CLOSELY /W 10 ONRAT'L ISSUES. COMPUTER GRAPHICS SOFTWARE PRESENT'N PLANNED WITH 3 TOP LOCAL HRDWRE VENDORS.

Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 610 SAN FRANCISCO

Country: 577 UNITED STATES OF AMERICA

Investment Promotion Priority Sectors Sub-Sectors  
Program Plans And Actipicipated Results.

Sector : 005 COMM. & INFORM. EQP. & SERV  
Subsector: 053 TELECOMMUNICATIONS (INC SPACE)

Reason(s):  
SILICON CHIP INDUSTRY HAS FOSTERED GROWTH OF MANY COS INVOLVED IN TELECOMMUNICATIONS INDUSTRY - COMMERCIAL & SATELLITE.

Program Plans:  
POST INTENDS TO DEVELOPS LARGER LIST OF CONTACTS IN SATELLITE COMMUNICATIONS AREA AND TO FOLLOW UP ON LEADS GENERATED BY DECEMBER 1986 MICROWAVE/MILLIMETER PRESENTATION.

Anticipated Results: TO EXPAND KNOWLEDGE BASE OF STRATEGIC ALLIANCE OPPORTUNITIES & AREAS TO EXPLORE CDN STRENGHTS IN SYSTEMS DEVELOPMENTS.

Sector : 004 DEFENCE PROGRAMS, PRODUCTS, SERV  
Subsector: 043 ELECTRICAL & ELECTRONIC

Reason(s):  
OVER 4.5 US BILLION DOLLARS SPENT IN SILICON VALLEY IN 86 ON DEFENCE ELECTRONICS.

Program Plans:  
TO TARGET KEY INDIVIDUALS IN MAJOR DEFENSE CONTRACTING FIRMS & EXPOSE THEM TO JOINT OPPORTUNITIES WITH CDN FIRMS WHICH HAVE REQUIRED CAPABILITIES. ADDITION OF NEW COMMERCIAL OFFICER WITH STRONG DEFENCE BACKGROUND WILL ASSIST IN PROCESS.

Anticipated Results: A LARGER NUMBER OF INVESTMENTS OR LICENSING AGREEMENTS IN AND WITH CANADIAN DEFENCE ELECTRONICS COMPANIES.

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 610 SAN FRANCISCO

Country: 577 UNITED STATES OF AMERICA

Investment Promotion Priority Sectors Sub-Sectors  
Program Plans And Actipicipated Results.

Sector : 014 EDUCATION, MEDICAL, HEALTH PROD  
Subsector: 141 PHARMACEUTICALS, BIOTECHNOLOGY

Reason(s):

OVER 125 BIOTECHNOLOGY FIRMS ARE LOCATED IN THE BAY AREA.

Program Plans:

TO FOLLOW UP ON CONTACTS MADE AT 87 SANTA CLARA BIOTECHNOLOGY PRESENTATION. OVER 40 LOCAL FIRMS ATTENDED INVESTMENT PRESENTATION ORGANIZED BY POST AND POST WILL ENSURE THAT EACH FIRM RECEIVES INFORMATION ON OPPORTUNITIES IN CANADIAN SECTOR.

Anticipated Results: JOINT VENTURE AND LICENCING AGREEMENTS WILL BE MADE WITH LOCAL BIOTECHNOLOGY COMPANIES AND CDN FIRMS IN ATTENDANCE AT BIOTECH 87.

Sector : 005 COMM. & INFORM. EGP. & SERV  
Subsector: 052 WORKPLACE AUTOMATION

Reason(s):

OVER 200 FIRMS IN SILICON VALLEY ARE INVOLVED IN WORKPLACE AUTOMATION INCLUDING LARGEST MANUFACTURERS OF LOCAL AREA NETWORK SYSTEMS.

Program Plans:

MADE CONTACT WITH 20 LOCAL FIRMS INVOLVED IN WORKPLACE AUTOMATION. CIRCULATE PROMOTIONAL INFORMATION GENERATED BY ELECTRONICS AD CAMPAIGN ON OPPORTUNITIES IN CANADA.

Anticipated Results: INCREASE AWARENESS LOCALLY OF SIZE OF CDN MARKET AND ADVANTAGES TO HAVING A SIZEABLE CDN PRESENCE IN OUR MKT. MORE THAN JUST A SALES AND DISTRIBUTION NETWORK.



Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 610 SAN FRANCISCO

Country: 577 UNITED STATES OF AMERICA

**Investment Promotion Priority Sectors Sub-Sectors  
Program Plans And Anticipated Results.**

Sector : 006 ELECTRONICS EQUIP. & SERV  
Subsector: 062 INSTRUMENTATION

**Reason(s):**

SILICON VALLEY IS THE HOME OF MAJOR US INSTRUMENTATION FIRMS SUCH AS H. P. AND VARIAN WHICH CREATED A NUMBER OF SFRA Companies INVOLVED IN THIS SUB-SECTOR.

**Program Plans:**

DISCUSS WITH MAJOR LOCAL COMPANIES THE ADVANTAGES OF WORKING WITH CANADIAN UNIVERSITIES IN DEVELOPING NEW PRODUCTS AND R AND D INITIATIVES IN CANADIAN RESOURCE MARKETPLACE.

**Anticipated Results:** INCREASED CANADIAN R & D EXPENDITURES BY MAJOR LOCAL INSTRUMENTATION FIRMS AND DEVELOPMENT OF CERTAIN PRODUCTS WITH GLOBAL MANDATES.

**Other Investment Program Plans**

**Activity(ies):**

TO CARRY OUT PR STRATEGY FOR ELECTRONICS SECTOR AND IMPLEMENTED BY INVESTMENT CANADA. PURPOSE IS TO INCREASE LOCAL AWARENESS OF CANADIAN CAPABILITIES IN SECTOR.

**Anticipated Results:** GREATER MEDIA EXPOSURE AND LOCAL AWARENESS OF EXPERTISE, VIBRANCE AND GROWTH-ORIENTED NATURE OF CANADIAN ELECTRONICS MARKETPLACE

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 610 SAN FRANCISCO

Country: 577 UNITED STATES OF AMERICA

Investment Promotion Activities Proposals

Type Of Event: 010 MINISTERIAL MISSION

Description: MIN. OF IND., SCIENCE & TECH. VISIT TO SILICON VAL

Priority: 6 Date: 09/88

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: 999 ALL SUB-SECTORS

Location:

Type Of Event: 040 DIRECT MAIL CAMPAIGN

Description: ELECTRO-OPTICS FOLLOW-UP

Priority: 3 Date: 06/88

Sector: 006 ELECTRONICS EQUIP. & SERV

Sub-Sector: 999 ALL SUB-SECTORS

Location:

Description: DIRECT MAIL CAMPAIGN USING RESOURCES DEV. BY

Priority: 2 Date: 04/88

Sector: 005 COMM. & INFORM. EQP. & SERV

Sub-Sector: 999 ALL SUB-SECTORS

Location:

Type Of Event: 050 SEMINARS

Description: COMPUTER GRAPHICS SOFTWARE PRESENTATION

Priority: 1 Date: 02/88

Sector: 005 COMM. & INFORM. EQP. & SERV

Sub-Sector: 999 ALL SUB-SECTORS

Location: SANTA CLARA

Description: SEMICONDUCTOR EQPT MFTRS AT SERVICON WEST

Priority: 4 Date: 05/88

Sector: 006 ELECTRONICS EQUIP. & SERV

Sub-Sector: 999 ALL SUB-SECTORS

Location: BAY AREA

DATE: 88/01/25

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 610 SAN FRANCISCO

Country: 577 UNITED STATES OF AMERICA

**Investment Promotion Activities Proposals**

Type Of Event: 070 OTHER PROMOTIONAL EVENTS

Description: INVSTMT AD CAMPAIGN FOLLOW-UP & CONTINUED FUNDING

Priority: 5

Date: 04/88

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: 999 ALL SUB-SECTORS

Location:

## Export and Investment Promotion Planning System

## 88/89 Trade and Economic Overview

Mission: 611 SEATTLE

Country: 577 UNITED STATES OF AMERICA

ECONOMICALLY, TRENDS IN THE URBAN AREAS OF PORTLAND & PUGET SOUND HAVE BEEN UNIFORMLY POSITIVE OVER THE PAST YEAR. ALL KEY SECTORS (AEROSPACE, ELECTRONICS, SOFTWARE, TRANSPORTATION, SERVICES & RETAIL) HAVE EXPERIENCED SIGNIFICANT GROWTH IN 1987. SEATTLE ITSELF IS IN THE MIDST OF A CONSTRUCTION BOOM WITH THE NUMBER OF BUILDING PERMITS MORE THAN DOUBLED. THE ECONOMY OUTSIDE THE 2 PRIMARY BUSINESS CENTERS HAS ALSO IMPROVED DUE PRIMARILY TO SIGNIFICANTLY INCREASED PRODUCTION & PROFIT LEVELS IN THE FORESTRY SECTOR. OVERALL, UNEMPLOYMENT HAS FALLEN APPROXIMATELY 0.5%. DESPITE THESE DEVELOPMENTS, HOWEVER, THE IMMEDIATE PROGNOSIS FOR THE REGION IS CAUTIOUS. BLACK MONDAY HAS ALREADY BEEN FELT IN THE SALE OF BIG TICKET ITEMS SUCH AS BOATS. BOEING, THE TERRITORY'S LARGEST CO., WITH 90,000 EMPLOYEES IN THE PUGET SOUND AREA, HAS EXPERIENCED A SEVERE PROFIT SQUEEZE DESPITE A \$30 B. ORDER BACKLOG. ALSO, THIS YEAR'S RECORD DROUGHT HAS ALREADY AFFECTED WINTER WHEAT GROWTH, DEPLETED WATER RESERVES & SOIL MOISTURE LEVELS & CURTAILED LOGGING OPERATIONS DUE TO FOREST FIRE DANGERS. DEPENDING ON HOW LONG IT CONTINUES, IT COULD HAVE SERIOUS IMPACT IN 1988 ON AGRICULTURE, ELECTRICITY PRODUCTION, TOURISM & THE SALMON FISHERIES. IN ADDITION, PROTECTIONISM LEGISLATION BEFORE CONGRESS COULD INJURE THE PORT & RELATED SERVICE OPERATIONS. WHILE LOCAL ECONOMISTS ARE RELUCTANT TO ASSIGN NUMBERS, THERE IS A GENERAL AGREEMENT THAT 1988 WILL RECORD A DOWNTURN. EXPORTS TO THIS 4 STATE REGION TOTALLED \$4.2 B. IN 1986 & ARE EXPECTED TO INCREASE 10% IN 1987. END PRODUCT SALES CONSTITUTE 22% OF THIS AMOUNT, UP FROM 17% IN 1985. GEOGRAPHICALLY, WASH. STATE IS THE DOMINANT MKT, WHILE B. C. & ALBERTA, WITH 84% OF THE TOTAL EXPORTS, ARE THE PRINCIPLE SOURCE OF CDN SALES. FOLLOWING 3 MAJOR CORPORATE INVESTMENTS IN 1985, CAPITAL FLOWS IN 1986 WERE RELATIVELY MODEST, GENERALLY FROM SMALL CO. ADVERSE PUBLICITY CONCERNING THE DE HAVILLAND STRIKE CAST A SHADOW ON LOCAL PERCEPTIONS OF CDA'S LABOUR CLIMATE WHICH WILL UNFORTUNATELY HAVE LINGERING EFFECTS. THE NEW TAX REGIME & FREE TRADE AGREEMENT ARE BOTH SEEN AS ATTRACTIONS FOR LOCAL INVESTORS. THE HORIZON DOES NOT APPEAR TO HOLD ANY ISSUES WHICH WILL DEMAND THE ATTENTION PREVIOUSLY DEVOTED TO LUMBER OR CURRENTLY TO THE F. T. A. OIL & GAS PRODUCTION IN ALASKA (ANWR), THE YUKON FISHERIES, ELECTRICITY SALES AND LIKELY SOME OTHER MINOR TRADE DISPUTES WILL REQUIRE SOME INPUT FROM THE TRADE STAFF AS PART OF AN INTEGRATED OPERATION. WITH THE EXCEPTION OF DEALING WITH SUPPLIERS TO BOEING, THIS OFFICE WILL CONTINUE TO FOCUS ON NEW EXPORTERS, MAINLY FROM WESTERN CDA, WITH THE OBJECTIVE OF GAINING A Foothold IN THE U. S. MKT BEFORE EXPANDING FURTHER. AS THERE ARE ONLY A FEW NAT'L SCALE TRADE SHOWS, THIS ACTIVITY WILL REQUIRE MULTISECTOR INITIATIVES SUCH AS NEBS AND INDIVIDUALIZED ATTENTION.

## Export and Investment Promotion Planning System

REPT: SYN-GEO 88/89 A. Post export program priorities

Region: UNITED STATES

Mission: 611 SEATTLE

Market: 577 UNITED STATES OF AMERICA

The Mission selected the following sectors as priority areas for export promotion activities for the coming fiscal year:

## 1. 008 TRANSPORT SYS, EQUIP, COMP, SERV.

REASONS: MAJOR CENTRE FOR MARINE PURCHASES & PRODUCTION. - NEW PROGRAMS AT BOEING & CORPORATE INTEREST IN IDENTIFYING SERIOUS & CAPABLE SUPPLIERS  
.-AUTOMOTIVE SERVICE & AFTERMARKET OPEN TO CANADIAN PRODUCTS.

## 2. 001 AGRI &amp; FOOD PRODUCTS &amp; SERVICE

REASONS: GOOD NICHE MARKET FOR CANADIAN PRODUCTS. -NATURAL EXTENSION OF WESTERN CANADA MARKET. - LOCAL INTEREST IN HORTICULTURAL PRODUCTS.

## 3. 013 CONSUMER PRODUCTS

REASONS: GOOD TEST MARKET AND ENTRY POINT. - MARKET EASILY ACCESSED FROM WESTERN CANADA. - MARKET OPEN TO NEW OR NICHE PRODUCTS.

## 4. 015 CONSTRUCTION INDUSTRY

REASONS: NUMEROUS NICHES FOR CANADIAN PRODUCTS. - B. C. AND ALBERTA PRODUCTS FIND READY APPLICATION. - GOOD TEST MARKET.

## 5. 005 COMM. &amp; INFORM. EQP. &amp; SERV

REASONS: MAJOR HI TECH INDUSTRY IN SEATTLE AND PORTLAND WHICH REQUIRES COMPONENTS AND SYSTEMS.

The most important current Canadian export sectors to this market are (based on actual export sales):

1. 011 OIL & GAS EQUIPMENT, SERVICES
2. 009 FOREST PRODUCTS, EQUIP, SERVICES
3. 008 TRANSPORT SYS, EQUIP, COMP, SERV.
4. 012 PETROCHEM & CHEM PROD, EQP, SERV

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 611 SEATTLE

Market: 577 UNITED STATES OF AMERICA

Sector: 001 AGRI &amp; FOOD PRODUCTS &amp; SERVICE

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1175.00M	\$ 1100.00M	\$ 1030.00M	\$ 887.00M
Canadian Exports \$	258.00M	\$ 241.00M	\$ 181.00M	\$ 175.00M
Canadian Share of Import Market	22.00%	21.90%	17.60%	19.70%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	080 %
ii) 075 CANADA	003 %
iii) 609 EUROPEAN COMMON MARKET C	003 %
iv) 011 AUSTRALIA	002 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) GOURMET FOODS	\$ 103.00 M
ii) MEAT & MEAT BI-PRODUCTS	\$ 67.00 M
iii) FRESH & FROZEN FISH	\$ 44.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- No factors reported by mission

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

## Export and Investment Promotion Planning System

MISSION: 611 SEATTLE

COUNTRY: 577 UNITED STATES OF AMERICA

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

- the adequacy of exporter information in Canadian Directories

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: SOLO FOOD SHOW - SEATTLE (MARCH 1988)

Results Expected: 5 NEW COMPANIES INTRODUCED TO MARKET, EXPAND LOCAL AWARENESS OF CDN SOURCES & \$75,000 SALES WITHIN ONE YEAR.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: PACIFIC MARINE EXPO

Results Expected: 10 EXHIBITORS. \$50,000 SALES IN FIRST YEAR.

Activity: SPECIALTY FOOD NEBS (SEPT 1988)

Results Expected: 20 NEW COMPANIES. \$10,000 SALES WITHIN ONE YEAR.

Activity: FOOD PACIFIC 88 (EXHIBITOR AND ATTENDEE RECRUITMENT)

Results Expected: STRONG ATTENDANCE AND EXHIBITOR PARTICIPATION ON BEHALF OF PACIFIC NW COMPANIES.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 611 SEATTLE

Market: 577 UNITED STATES OF AMERICA

Sector: 005 COMM. &amp; INFORM. EQP. &amp; SERV

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	620.00M	\$ 600.00M	\$ 600.00M	\$ 600.00M
Canadian Exports \$	120.00M	\$ 110.00M	\$ 105.00M	\$ 105.00M
Canadian Share of Import Market	19.00%	18.00%	18.00%	18.00%

## Major Competing Countries

## Market Share

- i) 577 UNITED STATES OF AMERICA
- ii) 265 JAPAN

080 %  
015 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector:

100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects

## Current Total Imports

	In Canadian \$
i) NAVIGATION EQUIPMENT	\$ 65.00 M
ii) OFFICE MACHINES	\$ 15.00 M
iii) TELECOMMUNICATIONS	\$ 15.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- the apparent limited sectoral capability in Canada compared to other competing export countries
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters



## Export and Investment Promotion Planning System

MISSION: 611 SEATTLE

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: PROMOTION OF DEFENCE/AEROSPACE OPPORTUNITIES.

Results Expected: 1. MAINTAIN CURRENT NUMBER OF BOEING APPROVED CDN SUPPLIERS AS BOEING DECREASES ITS SUPPLIER BASE. AT SAME TIME ADD SEVERAL NON-APPROVED CDN COS. TO BOEING SUPPLIERS LISTS.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ELECTRONICS COMPANIES NEBS TO NORTHCON 88, SEATTLE.

Results Expected: 1. INCREASE PARTICIPANTS' AWARENESS OF MKT POTENTIAL. 2. INTRODUCE PARTICIPANT TO COMPETITION & PRICING. 3. ENCOURAGE PARTICIPANTS TO ESTABLISH A DISTRIBUTOR.

Activity: \

Results Expected:

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 611 SEATTLE

Market: 577 UNITED STATES OF AMERICA

Sector: 008 TRANSPORT SYS, EQUIP, COMP, SERV.

Subsector: 081 AUTOMOTIVE

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import)	\$ 2500.00M	\$ 2370.00M	\$ 2250.00M	\$ 2140.00M
Canadian Exports	\$ 55.78M	\$ 50.20M	\$ 45.02M	\$ 40.40M
Canadian Share of Import Market	2.20%	2.10%	2.00%	1.90%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	080 %
ii) 349 MEXICO	005 %
iii) 265 JAPAN	003 %
iv) 128 GERMANY WEST	001 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Small but expanding

## Products/services for which there are good market prospects

## Current Total Imports

	In Canadian \$
i) THIRD STOP LIGHT	\$ 0.00 M
ii) SEAT COVERS	\$ 0.00 M
iii) POLY APPEARANCE CHEM.	\$ 0.00 M
iv) TRUCK BED LINERS	\$ 0.00 M
v) ELECTRONIC CONTROL MODULES	\$ 0.00 M
vi) GAS STRUTS	\$ 0.00 M
vii) UNIVERSAL CATALYTIC CONVERTERS	\$ 0.00 M
viii) GAS SHOCKS	\$ 0.00 M
ix) VIDEO TRAINING	\$ 0.00 M
x) ELECTRONIC DIAGNOSIS (HAND HELD)	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

## Export and Investment Promotion Planning System

MISSION: 611 SEATTLE

COUNTRY: 577 UNITED STATES OF AMERICA

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- the apparent limited sectoral capability in Canada compared to other competing export countries
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

- the adequacy of exporter information in Canadian Directories
- sourcing assistance from Canadian federal/provincial governments departments
- product/service information from Canadian companies

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: NEBS MISSION IN BOTH RETAIL AND O. E. M. PRODUCTS FOR THE AUTOMOTIVE AREA.

Results Expected: BETTER UNDERSTANDING OF MARKETS AND CONTACTS TO INCREASE SALE OPPORTUNITY.

Activity: POSSIBLE SOLO TRADE SHOW IN HEAVY DUTY TRUCK MARKET. LATE/88.

Results Expected: \$100,000 IN SALES.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 611 SEATTLE

Market: 577 UNITED STATES OF AMERICA

Sector: 008 TRANSPORT SYS, EQUIP, COMP, SERV.

Subsector: 083 MARINE INDUSTRIES

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	181.00M	\$ 173.00M	\$ 157.00M	\$ 157.00M
Canadian Exports \$	14.50M	\$ 12.20M	\$ 11.20M	\$ 10.20M
Canadian Share of Import Market	8.00%	7.00%	7.00%	6.00%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	092 %
ii) 434 TAIWAN	006 %
iii) 265 JAPAN	002 %
iv) 268 KOREA	001 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 30-60 \$M

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) PLEASURE BOATS	\$ 110.00 M
ii) MARINE ELECTRONICS	\$ 30.00 M
iii) MARINE COMPONENTS	\$ 27.00 M
iv) WORK BOATS	\$ 6.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters
- other factor(s) described by the Trade Office as follows:

IN COMMERCIAL SECTORS, JONES ACT CAN BE A PROBLEM.

## Export and Investment Promotion Planning System

MISSION: 611 SEATTLE

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade fairs
- competitive export pricing for this market
- strong sectoral capability in Canada

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: ONE DAY BUS TRIP TO VANCOUVER BOAT SHOW, 40 BUYERS FEB 4/88.

Results Expected: 35-40 AREA COMPANIES EXPOSED TO CDN SUPPLY CAPABILITIES.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ONE DAY BUS, BUYERS VISIT TO VANCOUVER, B. C. BOAT SHOW

Results Expected: 35-40 AREA COMPANIES EXPOSED TO CDN SUPPLY CAPABILITIES.

Activity: PACIFIC MARINE EXPO NOV 17-19, 1988. COMBINATION INFORMATION/ EXHIBIT BOOTH.

Results Expected: 10-20 CDN COMPANIES EXPOSED TO WORK BOAT/ FISHING BOAT INDUSTRY.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 611 SEATTLE

Market: 577 UNITED STATES OF AMERICA

Sector: 008 TRANSPORT SYS, EQUIP, COMP, SERV.

Subsector: 085 AEROSPACE

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	960.00M	\$ 880.00M	\$ 816.00M	\$ 780.00M
Canadian Exports \$	240.00M	\$ 220.00M	\$ 204.00M	\$ 195.00M
Canadian Share of Import Market	25.00%	25.00%	25.00%	25.00%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	085 %
ii) 609 EUROPEAN COMMON MARKET C	005 %
iii) 265 JAPAN	003 %
iv) 268 KOREA	000 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects

Current Total Imports  
In Canadian \$

i) AIRCRAFT SYSTEMS	\$ 73.00 M
ii) AIRCRAFT PARTS	\$ 30.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- approval of technical standards can present problems in the case of some imported products

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- the unsuitability of Canadian products for this market
- the apparent limited sectoral capability in Canada compared to other competing export countries
- non-tariff protectionist measures which are difficult to overcome

## Export and Investment Promotion Planning System

MISSION: 611 SEATTLE

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade missions
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: ONGOING PROMOTION OF BOEING OPPORTUNITIES FOR CANADIAN COMPANIES.

Results Expected: MAINTAIN CURRENT NUMBER OF BOEING APPROVED SUPPLIERS AS BOEING DECREASES ITS SUPPLIER BASE. AT SAME TIME ADD SEVERAL NON APPROVED CDN COS. TO BOEING'S SUPPLIER LIST.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: AD HOC GROUP VISITS TO BOEING.

Results Expected: EXPAND INVOLVEMENT OF CDN COMPANIES INTO A FULLER RANGE OF BOEING'S ACTIVITIES.

Activity: SELECTED MISSIONS IN CO-OPERATION WITH BRITISH COLUMBIA.

Results Expected: EXPAND NETWORK OF B. C. COMPANIES SUPPLYING BOEING.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 611 SEATTLE

Market: 577 UNITED STATES OF AMERICA

Sector: 013 CONSUMER PRODUCTS

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	6539.10M	\$ 6410.90M	\$ 5108.40M	\$ 4646.70M
Canadian Exports \$	75.00M	\$ 61.00M	\$ 57.50M	\$ 40.10M
Canadian Share of Import Market	1.10%	0.95%	1.10%	0.86%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	058 %
ii) 434 TAIWAN	010 %
iii) 268 KOREA	010 %
iv) 189 HONG KONG	010 %
v) 265 JAPAN	005 %
vi) 616 OTHER COUNTRIES	006 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

## Products/services for which there are good market prospects

## Current Total Imports In Canadian \$

i) MISC. OTHER PERSONAL & HOUSEHOLD	\$ 2930.70 M
ii) APPAREL	\$ 1923.30 M
iii) OFFICE PRODUCTS/FURNITURE	\$ 715.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- non competitive pricing
- high tariffs
- other factor(s) described by the Trade Office as follows:

SEATTLE, AS A REGIONAL MARKET, DOES NOT HOLD THE GLAMOUR OF LARGER METROPOLITAN AREAS, AND IS OFTEN THE LAST POINT OF EXPANSION FOR EASTERN CANADIAN MANUFACTURERS.



## Export and Investment Promotion Planning System

MISSION: 611 SEATTLE

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

- the adequacy of exporter information in Canadian Directories

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: INCOMING BUYERS TO VANCOUVER FURNITURE SHOW - MAY 88

Results Expected: INTRODUCE 12 RETAILERS.

Activity: TWO NEBS MISSIONS

Results Expected: INTRODUCE 40 COMPANIES TO THE MARKET.

Activity: INCOMING BUYERS TO FESTIVAL OF FASHION - MARCH 88

Results Expected: INTRODUCE 3 NEW BUYERS.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 611 SEATTLE

Market: 577 UNITED STATES OF AMERICA

Sector: 015 CONSTRUCTION INDUSTRY

Subsector: 151 BUILDING PRODUCTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	187.00M	\$ 181.00M	\$ 175.00M	\$ 169.00M
Canadian Exports \$	150.00M	\$ 145.00M	\$ 140.00M	\$ 130.00M
Canadian Share of Import Market	80.00%	80.00%	80.00%	80.00%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	090 %
ii) 075 CANADA	005 %
iii) 434 TAIWAN	001 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

## Products/services for which there are good market prospects

Current Total Imports  
In Canadian \$

i) COLD WEATHER TECHNOLOGY	\$ 0.00 M
ii) ALTERNATIVE LUMBER PRODUCTION	\$ 0.00 M
iii) THERMAL WINDOWS	\$ 0.00 M
iv) PROTECTIVE COATINGS	\$ 0.00 M
v) WATERLINE FREEZE PROTECTION	\$ 0.00 M
vi) ELECTRICAL PRODUCTS	\$ 0.00 M
vii) HAND TOOLS	\$ 0.00 M
viii) WALL COVERINGS	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing

## Export and Investment Promotion Planning System

MISSION: 611 SEATTLE

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters.
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

- the adequacy of exporter information in Canadian Directories
- sourcing assistance from Canadian federal/provincial governments departments
- product/service information from Canadian companies

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: SUPPORT CANADIAN PARTICIPATION IN WASHINGTON BUILDING MATERIALS SHOW.

Results Expected: SIX COMPANIES INCREASE THEIR PENETRATION INTO THE NW MARKET.

Activity: ENCOURAGE SUPPLIERS TO PARTICIPATE IN ONE OF TWO HOME SHOWS IN THE SEATTLE/TACOMA AREA.

Results Expected: SIX COMPANIES TO ENHANCE OR ESTABLISH THEIR MARKET POSITION.

Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 611 SEATTLE

Country: 577 UNITED STATES OF AMERICA

## Highlights of Investment Environment

Estimated Value Of Equity Investment  
In Canada From This Post Territory:

\$ 400.00 M

Estimated Value Of Annual Direct Equity  
Investments To All Destinations From  
This Post Territory:

\$ 5 300.00 M

Country Destinations Of Direct  
Equity Investment From Post  
TerritoryEstm. Value  
\$ CDN% Of Annual Direct Equity  
Investment Outflows By  
Category Of Investors

1. 075 CANADA	\$ 5 300.00 M	1. Corporations : 85.00 %
2. 051 UNITED KINGDOM	\$ 500.00 M	2. Institutional : 10.00 %
3. 620 EUROPE	\$ 500.00 M	3. Entrepreneurs : 4.00 %
4. 616 OTHER COUNTRIES	\$ 100.00 M	4. Immigrant Entr.: 1.00 %

The Mission Has Reported Factors That Tend To Change  
Outward Flows Of Investment From The Post Territory Including:

- Corporate Search For Cheaper Production And/Or Operating Costs Outside The Country
- Corporate Expansion To Seek New Markets
- Corporate Expansion To Serve Better Existing Markets

The Mission Reports That Investors From The Post Territory Who Invest Abroad  
In Manufacturing Tend To Invest In The Following Sector(s) Subsector(s)

## -SECTOR(S)-

1. 009 FOREST PRODUCTS, EQUIP, SERVICES
2. 009 FOREST PRODUCTS, EQUIP, SERVICES
3. 008 TRANSPORT SYS, EQUIP, COMP, SERV.
4. 006 ELECTRONICS EQUIP. & SERV

## -SUBSECTOR(S)-

- 094 PULP AND PAPER PRODUCTS
- 092 WOOD AND WOOD PRODUCTS
- 085 AEROSPACE
- 999 ALL SUB-SECTORS

DATE: 88/01/25

DEPARTMENT OF EXTERNAL AFFAIRS

PAGE: 281b

Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 611 SEATTLE

Country: 577 UNITED STATES OF AMERICA

**Equity Propensity Of Key Sources Of Investment From This Territory**

Corporations : Start-up Investment To Create New Enterprise (100% Ownership)  
Institutional :  
Entrepreneurs : Start-up Investment To Create New Enterprise (100% Ownership)  
Immigrant Entr.: Start-up Investment To Create New Enterprise (100% Ownership)

**Sector Preferences By Type Of Key Investors**

Corporations : Manufacturing Industries  
Institutional : Portfolio Investment  
Entrepreneurs : Services  
Immigrant Entr.: Services

**Investment Promotion Priority Sectors Sub-Sectors  
Program Plans And Anticipated Results.**

Sector : 005 COMM. & INFORM. EQP. & SERV  
Subsector: 999 ALL SUB-SECTORS

**Reason(s):**

THIS IS THE ONLY SECTOR IN THIS TERRITORY WHICH IS CONSISTANT WITH CANADIAN REQUIREMENTS AND HAS ADEQUATE BREADTH AND DEPTH TO WARRANT TARGETTING.

**Program Plans:**

CONTINUATION OF CORPORATE LIAISON ACTIVITIES WHICH FOCUS ON THIS SECTOR.

**Anticipated Results:** 10 COMPANIES TO LEARN MORE ABOUT OPPORTUNITIES IN CANADA. 3 TO REPRESENT GOOD INVESTMENT PROSPECTS.

DATE: 88/01/25

DEPARTMENT OF EXTERNAL AFFAIRS

PAGE: 281c

Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 611 SEATTLE

Country: 577 UNITED STATES OF AMERICA

Other Investment Program Plans

Activity(ies):

CORPORATE LIAISON CALLS ON TEN COMPANIES.

Anticipated Results: TEN REPORTS. POSSIBLE EXPANSION OR ESTABLISHMENT OF OPERATIONS IN CANADA.

Activity(ies):

INTRODUCTION OF INVESTMENT DIMENSION IN PROGRAMS IN TERRITORY ORGANIZED BY OTHER ORGANIZATIONS.

Anticipated Results: DEPENDS ON FACTORS BEYOND OUR CONTROL. THESE EVENTS COME UP AT SHORT NOTICE AND NONE ARE CURRENTLY PLANNED.

DATE: 88/01/25

DEPARTMENT OF EXTERNAL AFFAIRS

PAGE: 281d

Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 611 SEATTLE

Country: 577 UNITED STATES OF AMERICA

Investment Promotion Activities Proposals

Type Of Event: 071 INCOMING MISSION

Description: TECHNOLOGY TRANSFER MISS. TO BOEING(WITH B. C. GOVT)

Priority: 1

Date: 05/88

Sector: 999 MULTIPLE SECTORS

Sub-Sector: 999 ALL SUB-SECTORS

Location: SEATTLE, WA

## Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 611 SEATTLE		
Sector: 001 AGRI & FOOD PRODUCTS & SERVICE		
024 MISSION INCOMING		
WESTERN CANADA FARM PROGRESS SHOW	REGINA	0689
WESTERN CANADA FARM PROGRESS SHOW	REGINA	0690
Sector: 002 FISHERIES, SEA PRODUCTS & SERV.		
010 FAIRS		
FISH EXPO	SEATTLE	1089
Sector: 010 MINE, METAL, MINERAL PROD & SRV		
010 FAIRS		
N.W. MINING ASSOCIATION SHOW	SPOKANE	1289
Sector: 013 CONSUMER PRODUCTS		
024 MISSION INCOMING		
VANCOUVER FURNITURE MKT	VANCOUVER	0589
IIDEX	TORONTO	1090
VANCOUVER FURNITURE MKT	VANCOUVER	0590
IIDEX	TORONTO	1089



## Export and Investment Promotion Planning System

88/89 Trade and Economic Overview

Mission: 612 WASHINGTON

Country: 577 UNITED STATES OF AMERICA

DEFENCE PROGRAMS: MAJOR INITIATIVES LAST YR INCLUDED PRECISION GUIDED MISSILE STUDY, NADIB WKSHOPS; ESTABLISHMENT OF NEW NAVY & ARMY DDSA WKG GROUPS; SPECIAL INDUSTRY & SOLO PRESENTATIONS TO DOD PERSONNEL; LOBBYING OF SENIOR DOD OFFICIALS & CONGRESS IN SUPPORT OF MAJOR CDN SALES EFFORTS (EG. FAADS, MARV-SMUD, IRSTD, P3-C PATROL AIRCRAFT, SHIP REPAIR, CRV7, CL227, CL601); REPORTING ON DOD DEVELOPMENTS; & HELPING FIRMS WITH DEF. MKT ACCESS PROBLEMS. THE POST INCREASED ITS MONITORING & LOBBYING ON PROTECTIONIST PROPOSALS BY CONGRESS & DOD ACTIVITIES ON SEMI-CONDUCTORS, PRECISION OPTICS, BALL BEARINGS, ETC. & REVIEW OF DEF. MOUS. THE POST ALSO COMBATED RESTRICTIONS ON CDN ACCESS TO THE US DEF. MKT & TECH SUCH AS NORFORN RESTRICTIONS ON MEETINGS & BID PACKAGES, RESTRICTIONS ON ACCESS TO VHSIC & OTHER TECHNOLOGY. MANY NEW INITIATIVES WILL PEAK IN 88. MONITORING & LOBBYING ON CONGRESSIONAL & DOD ACTIVITIES WILL BE PARTICULARLY DEMANDING. PROTECTIONIST BILLS WILL LIKELY INCLUDE THE TRADE BILL, DIXON BILL ON DEF. INDUSTRIAL BASE & BUY AMERICA PROVISIONS IN THE DEFENCE AUTHORIZATION/APPROPRIATIONS BILLS. DOD ACTIVITIES TO BE COVERED WILL INCLUDE THE REVIEW OF PROCUREMENT MOUS, THE INDUSTRIAL BASE INITIATIVE & OTHER NADIB ISSUES ORGANIZATIONAL & PERSONNEL CHANGES AFFECTING PROCUREMENT, & TECH TRANSFER ISSUES (SEMICONDUCTORS, VHSIC, ETC). NEW DDSA WKG GROUPS WILL START TO BEAR FRUIT IN TERMS OF NEW R&D PROJECTS. SHARP REDUCTIONS IN DOD'S BUDGET WILL INTENSIFY COMPETITION FOR CONTRACTS. THIS COMBINED WITH DETERIORATING ECONOMY & FACT THAT 88 IS ELECTION YEAR WILL ADD TO THE PROTECTIONIST DEBATE. THE FTA WILL ALSO PLACE INCREASED DEMANDS ON POST. US EXPORT CONTROLS INITIATIVES WILL ALSO LIKELY COME TO A HEAD & REQUIRE SIGNIFICANT POST INPUT. HIGH LEVEL LOBBYING RE POTENTIAL MAJOR CDN SALES (EG FAADS, CRVY, CL227, CL601&LAV) WILL CONTINUE. AS A RESULT OF THE "COMPETITION IN CONTRACTING ACT" DOD AGENCIES EFFORTS TO IDENTIFY NEW SUPPLIERS HAVE DRAMATICALLY INCREASED. CDN INITIATIVES TO INTRODUCE COMPANIES HAVE BEEN WELCOMED WHOLEHEARTEDLY & INITIAL RESULTS HAVE BEEN SO GOOD THAT, WITHOUT EXCEPTION, THE AGENCIES WISH TO CONTINUE TO SEEK NEW CDN SOURCES. GOV'T PROCUREMENT/MARKET ACCESS: THE FTA WILL REQUIRE SUBSTANTIAL INFO GATHERING/ECONOMIC REPORTING BY POST, & WILL GREATLY INCREASE EXPORT PROMOTION WORK PARTICULARLY IN GOV'T PROCUREMENT (\$200 BIL MKT). IMPORTANT SECTORS OPEN TO CDN PRODUCTS ARE COMMUNICATIONS/INFORMATICS, ELECTRONICS (ESPECIALLY SPACE-RELATED), & OFFICE FURNITURE (ESP. SYSTEMS FURNITURE). NOAA, NASA, FAA, DOD, GSA ETC OFFER GOOD OPPORTUNITIES. MONITORING/LOBBYING AGAINST PROTECTIONISM IN FED. GOV'T PROCUREMENT & MARKET ACCESS AREAS WILL BE IMPORTANT. THE FAVOURABLE US-CDN DOLLAR EXCHANGE RATE CONTINUES TO OPEN OPPORTUNITIES FOR NEW CDN EXPORTERS WHO OFTEN REQUIRE MARKET ACCESS ADVICE & HELP TO SELL SUCCESSFULLY IN THE USA AS A WHOLE. BUSINESS INFO CENTER TYPE OF DEMANDS WILL INCREASE. THE NEW CUSTOMS

## Export and Investment Promotion Planning System

REPT: SYN-GEO 88/89 A. Post export program priorities

Region: UNITED STATES

Mission: 612 WASHINGTON

Market: 577 UNITED STATES OF AMERICA

The Mission selected the following sectors as priority areas for export promotion activities for the coming fiscal year:

## 1. 004 DEFENCE PROGRAMS, PRODUCTS, SERV

REASONS: HUGE US DEFENCE PROCUREMENT PROGRAM; NEW INITIATIVES (ADI, SDI, PROJECT FORECAST 2, FAADS, ETC); BILATERAL INITIATIVES (NEW DDSA WORKING GROUPS, JOINT CERTIFICATION, PRECISION GUIDED MISSILES STUDY, N. A. DEFENCE

## 2. 005 COMM. &amp; INFORM. EQP. &amp; SERV

REASONS: TERRITORY'S CONCENTRATION OF HI-TECH/PROCESSING IND. OFFERS RICH MKT FOR SOFTWARE SYSTEMS & SECURITY SYSTEMS.

## 3. 001 AGRI &amp; FOOD PRODUCTS &amp; SERVICE

REASONS: US FEDERAL GOV'T IS AUTOMATING ITS OPERATIONS (CREATING EXTENSIVE DEMAND FOR COMMUNICATIONS, INFORMATICS & ELECTRONICS) & CONSOLIDATING ITS OFFICE SPACE (CREATING LARGE DEMAND FOR OFFICE SYSTEMS FURNITURE).

## 4. 006 ELECTRONICS EQUIP. &amp; SERV

REASONS: LARGE MARKET (21M POP. & 2 OF TOP 7 US MARKET AREAS). FAVOURABLE EXCHANGE RATES OFFER OPPORTUNITIES FOR PROCESSED FOOD & CONSUMER PRODUCTS. MANY PROMOTIONAL VEHICLES OFFERING MAX. PRODUCT EXPOSURE. THERE

## 5. 013 CONSUMER PRODUCTS

REASONS: SEE 3

## 6. 014 EDUCATION, MEDICAL, HEALTH PROD

REASONS: CANADIAN HEALTHCARE PRODUCTS ARE SUITABLE FOR LARGE US MARKET ONCE ACCESS OBSTACLES ARE OVERCOME (ESPECIALLY FDA REQUIREMENTS).

The most important current Canadian export sectors to this market are (based on actual export sales):

1. 004 DEFENCE PROGRAMS, PRODUCTS, SERV
2. 005 COMM. & INFORM. EQP. & SERV
3. 006 ELECTRONICS EQUIP. & SERV
4. 013 CONSUMER PRODUCTS
5. 009 FOREST PRODUCTS, EQUIP, SERVICES
6. 008 TRANSPORT SYS, EQUIP, COMP, SERV.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 612 WASHINGTON

Market: 577 UNITED STATES OF AMERICA

Sector: 001 AGRI &amp; FOOD PRODUCTS &amp; SERVICE

Subsector: 015 SEMI &amp; PROCESSED FOOD &amp; DRINK

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import)	\$ 53000.00M	\$52668.00M	\$51289.00M	\$50985.00M
Canadian Exports	\$ 254.00M	\$ 252.00M	\$ 250.00M	\$ 246.00M
Canadian Share of Import Market	0.01%	0.01%	0.01%	0.01%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	095 %
ii) 075 CANADA	002 %
iii) 047 BRAZIL	001 %
iv) 112 FRANCE	001 %
v) 431 PHILIPPINES	001 %
vi) 349 MEXICO	001 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) ALCOHOLIC BEVERAGES	\$ 202.50 M
ii) BAKERY GOODS	\$ 48.30 M
iii) CONFECTIONERY	\$ 23.50 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- the unsuitability of Canadian products for this market
- the apparent limited sectoral capability in Canada compared to other competing export countries
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

## Export and Investment Promotion Planning System

MISSION: 612 WASHINGTON

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada
- the existence of a bilateral economic/trade arrangement between Canada and this country
- the availability of competitive Canadian financing

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ESTABLISH A DATABASE OF PRODUCT-SPECIFIC DISTRIBUTORS IN FOOD SECTOR.

Results Expected: PROVIDE RELIABLE PRODUCT MATCHING INFORMATION FOR CANADIAN PRODUCERS.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 612 WASHINGTON

Market: 577 UNITED STATES OF AMERICA

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Subsector: 041 AEROSPACE &amp; MARINE

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import)	\$ 53000.00M	\$53000.00M	\$53000.00M	\$53000.00M
Canadian Exports	\$ 500.00M	\$ 400.00M	\$ 296.00M	\$ 609.00M
Canadian Share of Import Market	1.00%	0.80%	0.60%	1.10%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	000 %
ii) 051 UNITED KINGDOM	000 %
iii) 128 GERMANY WEST	000 %
iv) 112 FRANCE	000 %
v) 237 ITALY	000 %
vi) 038 BELGIUM	000 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) RPVS/DRONES	\$ 0.00 M
ii) ROVS	\$ 0.00 M
iii) AIRCRAFT ENGINES AND PARTS	\$ 0.00 M
iv) TRANSPORT EW AIRCRAFT	\$ 0.00 M
v) AIRFRAME COMPONENTS	\$ 0.00 M
vi) SONOMUOYS	\$ 0.00 M

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

- i) Project Name: AIR DEFENSE INITIATIVE  
 Approximate Value: \$ 600 M  
 Financing Source: 012 DOM  
 For further info. please contact:  
 D. BUXTON (EMBASSY) EXTOTT/TDU

## Export and Investment Promotion Planning System

MISSION: 612 WASHINGTON

COUNTRY: 577 UNITED STATES OF AMERICA

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

## ii) Project Name: COMPONENTS FOR VARIOUS TACTICAL HELICOPTERS

Approximate Value: \$ M

Financing Source: 012 DDM

For further info. please contact:

R. MAHAR, D. BUXTON (EMBASSY) J. PAGNUTTI, EXTOTT/TDM

## iii) Project Name: RPVS/DRONES

Approximate Value: \$ 1000 M

Financing Source: 012 DDM

For further info. please contact:

R. MAHAR, D. BUXTON, W. DECHANT (EMBASSY)

## iv) Project Name: COMPONENTS &amp; SUBSYSTEMS FOR NAVY SHIPS, SUBMARINES

Approximate Value: \$ M

Financing Source: 012 DDM

For further info. please contact:

W. DECHANT (EMBASSY) M. REID EXTOTT/TDU

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- there are import restrictions which can present significant problems

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- the apparent limited sectoral capability in Canada compared to other competing export countries
- non-tariff protectionist measures which are difficult to overcome
- other factor(s) described by the Trade Office as follows:  
BUY AMERICAN LEGISLATION, INCLUDING BYRNES TOLLEFSON AMENDMENT, SMALL BUSINESS SET-ASIDES, ETC. ACCESS TO INFORMATION, NATIONAL SECURITY/FOREIGN DISCLOSURE CONSTRAINTS, ETC.

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada
- the existence of a bilateral economic/trade arrangement between Canada and this country

## Export and Investment Promotion Planning System

MISSION: 612 WASHINGTON

COUNTRY: 577 UNITED STATES OF AMERICA

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

- the adequacy of exporter information in Canadian Directories
- sourcing assistance from Canadian federal/provincial governments departments
- product/service information from Canadian companies

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: WORKING WITH NAVY & ASD WKG. GRP. & ADATS SUBCOMMITTEE TO IDENTIFY JOINT DEVELOPMENT OPPORTUNITIES

Results Expected: INCREASED R&D PROJECTS LEADING TO EXPORT SALES.

Activity: ENCOURAGE CAPABLE CDN FIRMS TO COMPETE IN THIS MARKET THROUGH INDIVIDUAL COUNSELLING, GROUP SEMINARS, HI-TECH CONFERENCE, ETC.

Results Expected: INCREASED EXPORT SALES.

Activity: MONITOR DEVELOPMENTS IN CONGRESS AND DOD AFFECTING CDN ACCESS TO US DEFENCE MARKET AND ATTEMPT TO ENSURE THAT CDN INTERESTS ARE ADEQUATELY CATERED

Results Expected: CONTINUED ACCESS TO US DEFENCE MARKET.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: SERIES OF INDUSTRY PRESENTATIONS AT EMBASSY. (ONE OR MORE COMPANIES PER BRIEFING).

Results Expected: R&D CONTRACTS AND INCREASED SALES.

Activity: COMPREHENSIVE INVESTIGATION OF SPACE-RELATED R&D AND PROCUREMENT OPPORTUNITIES WITH NASA, DARPA & US AIR FORCE.

Results Expected: INCREASED R&D CONTRACTS AND SALES.

Export and Investment Promotion Planning System

MISSION: 612 WASHINGTON

COUNTRY: 577 UNITED STATES OF AMERICA

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: SENIOR LEVEL DOD AND CONGRESSIONAL MEETINGS (AS APPROPRIATE) TO LOBBY ON BEHALF OF CANADIAN PRODUCTS.

Results Expected: INCREASED SALARY.



## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 612 WASHINGTON

Market: 577 UNITED STATES OF AMERICA

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Subsector: 042 ARMAMENTS &amp; VEHICLES

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import)	\$ 30000.00M	\$29000.00M	\$29000.00M	\$28000.00M
Canadian Exports	\$ 300.00M	\$ 250.00M	\$ 214.00M	\$ 418.00M
Canadian Share of Import Market	1.00%	0.90%	0.70%	1.50%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	096 %
ii) 051 UNITED KINGDOM	001 %
iii) 128 GERMANY WEST	000 %
iv) 112 FRANCE	000 %
v) 237 ITALY	000 %
vi) 038 BELGIUM	000 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

## Products/services for which there are good market prospects

## Current Total Imports

	In Canadian \$
i) LAV	\$ 0.00 M
ii) ADATS	\$ 0.00 M
iii) CRV-7	\$ 0.00 M
iv) VEHICLE COMPONENTS	\$ 0.00 M
v) ILTIS JEEP	\$ 0.00 M
vi) TANK PARTS	\$ 0.00 M
vii) SPECIAL PURPOSE VEHICLES	\$ 0.00 M
viii) PRECISION GUIDED MISSILE COMPONENTS	\$ 0.00 M
ix) AMMUNITION/ORDNANCE	\$ 0.00 M
x) SMALL ARMS	\$ 0.00 M

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

i) Project Name: ARMoured AND LIGHT ARMoured VEHICLES

Approximate Value: \$ M

Financing Source: 012 DOM

For further info. please contact:

R. MAHAR, D. BUXTON (EMBASSY) EXTOTT/TDM

## Export and Investment Promotion Planning System

MISSION: 612 WASHINGTON

COUNTRY: 577 UNITED STATES OF AMERICA

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

ii) Project Name: POSSIBLE PROCUREMENT OF JEEPS BY LIGHT FORMATIONS

Approximate Value: \$ M  
 Financing Source: 012 DOM  
 For further info. please contact:  
 R. MAHAR (EMBASSY) EXTOTT/TDU

iii) Project Name: MISCELLANEOUS STRATEGIC AND TACTICAL MISSILES

Approximate Value: \$ 1500 M  
 Financing Source: 012 DOM  
 For further info. please contact:  
 R. MAHAR, D. BUXTON, W. DECHANT (EMBASSY) EXTOTT/TDU

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- there are import restrictions which can present significant problems

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- the apparent limited sectoral capability in Canada compared to other competing export countries
- non-tariff protectionist measures which are difficult to overcome
- other factor(s) described by the Trade Office as follows:  
 BUY AMERICA LEGISLATION/PRACTICES; SMALL BUSINESS SET ASIDES;  
 ACCESS TO INFORMATION, NATIONAL SECURITY; FOREIGN DISCLOSURE  
 CONSTRAINTS.

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada
- the existence of a bilateral economic/trade arrangement between Canada and this country

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

- the adequacy of exporter information in Canadian Directories
- sourcing assistance from Canadian federal/provincial governments departments
- product/service information from Canadian companies

## Export and Investment Promotion Planning System

MISSION: 612 WASHINGTON

COUNTRY: 577 UNITED STATES OF AMERICA

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: ESTABLISHMENT OF NEW DDSA WORKING GROUPS WITH MICOM, ARDEC, CRDC & BELVOIR RD CENTER.

Results Expected: INCREASED DDSA PROJECTS LEADING TO INCREASED SALES.

Activity: CONTINUE TO WORK WITH MAJOR CANADIAN SUPPLIERS TO IDENTIFY AND SECURE MARKET ACCESS (EG. DIEMACO, BRISTOL, CANADAIR, CDC, GM, BOMBARDIER).

Results Expected: INCREASED SALES.

Activity: FOLLOW UP TO PRECISION GUIDED MISSILE STUDY.

Results Expected: INCREASED SALES OF MISSILE COMPONENTS.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: SERIES OF INDIVIDUAL COMPANY PRESENTATIONS AT EMBASSY TO DOD OFFICIALS.

Results Expected: INCREASED SALES.

Activity: SENIOR LEVEL DOD AND CONGRESSIONAL MEETINGS (AS APPROPRIATE) TO LOBBY ON BEHALF OF CANADIAN PRODUCTS.

Results Expected: INCREASED SALES.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 612 WASHINGTON

Market: 577 UNITED STATES OF AMERICA

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Subsector: 043 ELECTRICAL &amp; ELECTRONIC

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import)	\$ 28000.00M	\$28000.00M	\$28000.00M	\$27000.00M
Canadian Exports	\$ 550.00M	\$ 500.00M	\$ 437.00M	\$ 559.00M
Canadian Share of Import Market	2.00%	1.80%	1.60%	2.10%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	000 %
ii) 051 UNITED KINGDOM	000 %
iii) 128 GERMANY WEST	000 %
iv) 112 FRANCE	000 %
v) 237 ITALY	000 %
vi) 038 BELGIUM	000 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

## Products/services for which there are good market prospects

## Current Total Imports

	In Canadian \$
i) COMMUNICATIONS EQUIPMENT	\$ 0.00 M
ii) FIRE CONTROL SYSTEMS	\$ 0.00 M
iii) ELECTRONIC COMPONENTS/SUBASSEMBLIES	\$ 0.00 M
iv) TRAINING SIMULATORS/SYSTEMS	\$ 0.00 M
v) NAVIGATION EQUIPMENT	\$ 0.00 M
vi) AVIONICS	\$ 0.00 M
vii) SECURITY SYSTEMS	\$ 0.00 M
viii) INFORMATICS	\$ 0.00 M

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

- i) Project Name: DUER RADIO (CMC HAS R&D CONTRACT).  
Approximate Value: \$ 1000 M  
Financing Source: 012 DOM  
For further info. please contact:  
R. MAHAR (EMBASSY) EXTOTT/TDU/TDM

## Export and Investment Promotion Planning System

MISSION: 612 WASHINGTON

COUNTRY: 577 UNITED STATES OF AMERICA

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

ii) Project Name: TRAINING SIMULATORS FOR ARMY & AIR FORCE  
 Approximate Value: \$ M  
 Financing Source: 012 DOM  
 For further info. please contact:  
 R. MAHAR & D. BUXTON(EMBASSY)EXTOTT/TDU/TDM

iii) Project Name: FAADS (ADATS)  
 Approximate Value: \$ 1000 M  
 Financing Source: 012 DOM  
 For further info. please contact:  
 W. DECHANT (EMBASSY) EXTOTT/TDU

iv) Project Name: AWDS/LAMPS  
 Approximate Value: \$ M  
 Financing Source: 012 DOM  
 For further info. please contact:  
 D. BUXTON, W. DECHANT (EMBASSY) EXTOTT/TDU

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- there are import restrictions which can present significant problems

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- the apparent limited sectoral capability in Canada compared to other competing export countries
- non-tariff protectionist measures which are difficult to overcome
- other factor(s) described by the Trade Office as follows:  
 BUY AMERICA LEGISLATION, SMALL BUSINESS SET-ASIDES, ETC.  
 ACCESS TO INFORMATION, ETC. NATIONAL SECURITY/FOREIGN DISCLOSURE  
 CONSTRAINTS, ETC.

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada
- the existence of a bilateral economic/trade arrangement between Canada and this country

## Export and Investment Promotion Planning System

MISSION: 612 WASHINGTON

COUNTRY: 577 UNITED STATES OF AMERICA

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

- the adequacy of exporter information in Canadian Directories
- sourcing assistance from Canadian federal/provincial governments departments
- product/service information from Canadian companies

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: COMPLETION OF SEVERAL MAJOR ONGOING DDSA PROJECTS IN THIS AREA AND SIGNING UP OF ADDITIONAL NEW PROJECTS.

Results Expected: SIGNIFICANT EXPORT SALES.

Activity: ESTABLISHMENT OF NEW DDSA WORKING GROUP WITH NATICK.

Results Expected: INCREASE IN DDSA PROJECTS LEADING TO INCREASED SALES.

Activity: MONITOR AND REPORT ON OPPORTUNITIES IN US DEFENCE MARKET.

Results Expected: INCREASED EXPORT SALES.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: INDIVIDUAL COMPANY REPRESENTATIONS TO DOD OFFICIALS AT EMBASSY.

Results Expected: -TO INTRODUCE CANADIAN COMPANIES TO KEY CONTACTS IN DOD.  
-INCREASED SALES

Activity: SENIOR LEVEL REPRESENTATIONS TO DOD OFFICIALS ON BEHALF OF CANADIAN PRODUCTS (AS APPROPRIATE).

Results Expected: INCREASED SALES.

Activity: INVESTIGATION OF MARKET OPPORTUNITIES WITHIN DOD FOR CANADIAN INFORMATICS COMPANIES.

Results Expected: INCREASED SALES.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 612 WASHINGTON

Market: 577 UNITED STATES OF AMERICA

Sector: 005 COMM. &amp; INFORM. EQP. &amp; SERV

Subsector: 054 COMPUTERS, SOFTWARE &amp; SYSTEMS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	5000.00M	\$ 4500.00M	\$ 4000.00M	\$ 3000.00M
Canadian Exports \$	0.00M	\$ 0.00M	\$ 0.00M	\$ 0.00M
Canadian Share of Import Market	0.00%	0.00%	0.00%	0.00%

Major Competing Countries	Market Share
i) 577 UNITED STATES OF AMERICA	000 %
ii) 265 JAPAN	000 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 30-60 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) SPECIALIZED (NICHE) MICRO-MINI-COMPUTER SOFTWARE	\$ 0.00 M
ii) SPECIALIZED MAINFRAME SOFTWARE	\$ 0.00 M
iii) DATABASE ARCHIVAL (OPTICAL DISK) PRODUCTS	\$ 0.00 M
iv) SYSTEMS CONSULTING (FROM USA OFFICE)	\$ 0.00 M
v) LOCAL-AREA NETWORK PRODUCTS	\$ 0.00 M

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

i) Project Name: GSA ADP SCHEDULE CONTRACTS  
Approximate Value: \$ 500 M  
Financing Source: 012 DOM  
For further info. please contact:  
EMBASSY: 202-483-5505

ii) Project Name: USA FEDERAL GOVERNMENT-WIDE INCREASING COMPUTERIZATION  
Approximate Value: \$ 5000 M  
Financing Source: 012 DOM  
For further info. please contact:  
EMBASSY: 202-483-5505

## Export and Investment Promotion Planning System

MISSION: 612 WASHINGTON

COUNTRY: 577 UNITED STATES OF AMERICA

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

iii) Project Name: SPACE STATION & SPACE-RELATED PROJECTS  
(SUBS PRIME SUBCONTR FOR COMPUTER PROD)

Approximate Value: \$ 10000 M

Financing Source: 012 DOM

For further info. please contact:

EMBASSY: 202-483-5505

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- approval of technical standards can present problems in the case of some imported products

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- non-tariff protectionist measures which are difficult to overcome
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters
- other factor(s) described by the Trade Office as follows:

BUY AMERICA

NATIONAL SECURITY

LACK OF KNOWLEDGE BY CDN EXPORTERS OF USA GOVT. PROCUREMENT PRACTICES.

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade fairs
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada
- the existence of a bilateral economic/trade arrangement between Canada and this country

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

- the adequacy of exporter information in Canadian Directories



## Export and Investment Promotion Planning System

MISSION: 612 WASHINGTON

COUNTRY: 577 UNITED STATES OF AMERICA

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: ENCOURAGING CAPABLE CDN FIRMS TO COMPETE IN THIS MARKET, THROUGH INDIVIDUAL ADVICE AND ASSISTANCE, AND THROUGH GROUP SEMINARS.

Results Expected: 10 NEW FIRMS COMMITTED TO MARKETING IN THIS AREA.

Activity: ASSISTING ESTABLISHED FIRMS TO MAKE SALES TO FEDERAL GOVT. AGENCIES, THROUGH COMPANY PRESENTATIONS AT THE EMBASSY TO SELECTED SENIOR OFFICIALS.

Results Expected: 5 FIRMS TO MAKE TOTAL \$250,000 IN SALES

Activity: MONITOR DEVELOPMENTS IN FEDERAL GOVT. COMPUTER PROCUREMENT POLICY AND PROJECTS, ADVISE CDN INDUSTRY OF SIGNIFICANT CHANGES, AND ENSURE U.S. OFFICIALS AWARE OF CDN INTERESTS.

Results Expected: CDN GOVT. AND INDUSTRY AWARE OF MARKET ENVIRONMENT AND ARE NOT ADVERSELY AFFECTED BY PROTECTIONIST MEASURES

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: INFORM USA FEDERAL GOVT. OF EFFECT OF FREE TRADE AGREEMENT SECTION ON PROCUREMENT AS IT RELATES TO THIS SECTOR.

Results Expected: CDN COMPUTER FIRMS WILL BE ENCOURAGED TO BID ON CONTRACTS IN NEWLY OPENED RANGE OF \$25,000 TO 171,000 EXEMPT FROM BUY-AMERICA

Activity: PRODUCE BROCHURE ADVISING CDN FIRMS OF OPPORTUNITIES RESULTING FROM FTA IN AREA OF GOVT. PROCUREMENT.

Results Expected: 200 CDN FIRMS PROVIDED WITH SPECIFIC ADVICE ON HOW TO MAKE USE OF NEW OPPORTUNITY.

Activity: PROVIDE TOUR OF NEW CHANCERY WITH SPECIFIC FOCUS ON CANADIAN CAPABILITIES SHOWN BY COSICS TO SELECTED SENIOR US FEDERAL OFFICIALS.

Results Expected: REPUTATION OF CANADIAN INDUSTRY CAPABILITY IN THIS SECTOR WILL BE ENHANCED AMONGST DECISION MAKERS.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 612 WASHINGTON

Market: 577 UNITED STATES OF AMERICA

Sector: 005 COMM. &amp; INFORM. EQP. &amp; SERV

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	25985.00M	\$23623.00M	\$19678.00M	\$17352.00M
Canadian Exports \$	469.30M	\$ 426.60M	\$ 393.50M	\$ 298.00M
Canadian Share of Import Market	1.80%	1.80%	2.00%	1.70%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	085 %
ii) 265 JAPAN	010 %
iii) 609 EUROPEAN COMMON MARKET C	002 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

i) TELEPHONE EQUIPMENT	\$ 85.80 M
ii) OFFICE EQUIPMENT	\$ 248.60 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be moderate

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- other factor(s) described by the Trade Office as follows:  
LIMITED FINANCIAL AND MANAGEMENT (MARKETING) CAPABILITIES BY MANY CANADIAN FIRMS - PARTICULARLY SOFTWARE SUPPLIERS.

## Export and Investment Promotion Planning System

MISSION: 612 WASHINGTON

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- use of Canadian Government export promotion activities

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: POST TO UPDATE AND FURTHER DEVELOP ITS COMPUTERIZED MANAGEMENT SYSTEM

Results Expected: A MORE EFFICIENT DISTRIBUTOR/AGENT/RETAIL IDENTIFICATION SYSTEM FOR THE SOURCING OF CANADIAN CORPORATE ENQUIRIES

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 612 WASHINGTON

Market: 577 UNITED STATES OF AMERICA

Sector: 006 ELECTRONICS EQUIP. &amp; SERV

Subsector: 062 INSTRUMENTATION

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	0.00M	\$ 0.00M	\$ 0.00M	\$ 0.00M
Canadian Exports \$	0.00M	\$ 0.00M	\$ 0.00M	\$ 0.00M
Canadian Share of Import Market	0.00%	0.00%	0.00%	0.00%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	000 %
ii) 128 GERMANY WEST	000 %
iii) 265 JAPAN	000 %
iv) 051 UNITED KINGDOM	000 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 30-60 \$M

Current status of Canadian exports: Well established and growing

## Products/services for which there are good market prospects

## Current Total Imports

	In Canadian \$
i) ELECTRONIC MEASURING INSTRUMENTATION	\$ 0.00 M
ii) METEOROLOGICAL INSTRUMENTS	\$ 0.00 M
iii) HAZARD DETECTING INSTRUMENTS	\$ 0.00 M
iv) ENVIRONMENTAL POLLUTION INSTRUMENTATION	\$ 0.00 M
v) OTHER SCIENTIFIC INSTRUMENTATION	\$ 0.00 M

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

- i) Project Name: NEW LANDSAT SATELLITE PROJ WILL ENHANCE DOWNSTREAM OPPORT FOR REMOTE-SENSING,

Approximate Value: \$ 500 M

Financing Source: 012 DOM

For further info. please contact:

EMBASSY: 202-483-5505

- ii) Project Name: SPACE STATION & SPACE-RELATED PROJ(SUBS PRIME/SUBCONTR FOR ELECTR INSTRUM PROD)

Approximate Value: \$ 10000 M

Financing Source: 012 DOM

For further info. please contact:

EMBASSY: 202-483-5505

## Export and Investment Promotion Planning System

MISSION: 612 WASHINGTON

COUNTRY: 577 UNITED STATES OF AMERICA

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

- iii) Project Name: GSA ADP SCHEDULE CONTRACTS  
Approximate Value: \$ 500 M  
Financing Source: 012 DOM  
For further info. please contact:  
EMBASSY: 202-483-5505

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low
- approval of technical standards can present problems in the case of some imported products

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- non-tariff protectionist measures which are difficult to overcome
- other factor(s) described by the Trade Office as follows:  
BUY AMERICAN AND NATIONAL SECURITY RESTRICTIONS, PLUS LACK OF KNOWLEDGE ON PART OF CDN FIRMS OF U.S. FEDERAL GOVERNMENT PROCUREMENT PRACTICES.

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade fairs

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

- the adequacy of exporter information in Canadian Directories

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: ENCOURAGING CAPABLE CDN FIRMS TO COMPETE IN THIS MARKET, THROUGH INDIVIDUAL ADVICE AND ASSISTANCE, AND THROUGH GROUP SEMINARS.

Results Expected: 3 NEW FIRMS COMMITTED TO MARKETING IN THIS AREA.

## Export and Investment Promotion Planning System

MISSION: 612 WASHINGTON

COUNTRY: 577 UNITED STATES OF AMERICA

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: ASSISTING ESTABLISHED FIRMS TO MAKE SALES TO FED. GOVT. AGENCIES, THROUGH COMPANY PRESENTATIONS AT THE EMBASSY TO SELECTED SENIOR OFFICIALS.

Results Expected: 3 FIRMS TO MAKE TOTAL \$200,000 IN SALES.

Activity: MONITOR DEVELOPMENTS IN FED. GOVT. COMMUNICATIONS PROCUREMENT POLICY AND PROJECTS, ADVISE CDN. INDUSTRY OF SIGNIFICANT CHANGES, AND ENSURE U.S. OFFICIALS AWARE OF CDN INTERESTS.

Results Expected: CDN GOVT. AND INDUSTRY AWARE OF MARKET ENVIRONMENT AND ARE NOT ADVERSELY AFFECTED BY PROTECTIONIS MEASURES.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: INFORM USA FED GOVT OF EFFECT OF FREE TRADE AGREEMENT SECTION ON PROCUREMENT AS IT RELATES TO THIS SECTOR.

Results Expected: CDN ELECTRONICS FIRMS WILL BE ENCOURAGED TO BID ON CONTRACTS IN NEWLY OPENED RANGE OF \$25,000 TO 171,000 EXEMPT FROM BUY-AMERICA.

Activity: PRODUCE BROCHURE ADVISING CDN FIRMS OF OPPORTUNITIES RESULTING FROM FTA IN AREA OF GOVT. PROCUREMENT.

Results Expected: 30 CDN FIRMS PROVIDED WITH SPECIFIC ADVICE ON HOW TO MAKE USE OF NEW OPPORTUNITY.

Activity: PRODUCE ANALYSIS OF MKT OPPORTUNITIES CREATED BY MAJOR PROJECTS TO BE CONDUCTED BY NASA (SPACE STATION); DEPT. OF COMMERCE (REMOTE-SENSING FOR VARIOUS USES), & BY EPA, USGS, & OTHER AGENCIES AS RESULT OF CLEAN AIR/WATER BILLS.

Results Expected: CDN INDUSTRY PROVIDED WITH ACCURATE & IN-DEPTH INFORMATION AS TO NEW MARKETS AVAILABLE.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 612 WASHINGTON

Market: 577 UNITED STATES OF AMERICA

Sector: 013 CONSUMER PRODUCTS

Subsector: 131 APPAREL (CLOTH, FUR, SHOES) TEXT

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	9207.00M	\$ 9108.00M	\$ 8909.00M	\$ 8712.00M
Canadian Exports \$	19.00M	\$ 18.00M	\$ 17.00M	\$ 0.00M
Canadian Share of Import Market	0.00%	0.00%	0.00%	0.00%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	070 %
ii) 434 TAIWAN	010 %
iii) 189 HONG KONG	008 %
iv) 268 KOREA	007 %
v) 192 PEOPLE'S REP OF CHINA	003 %
vi) 431 PHILIPPINES	002 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 60-100 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are  
good market prospects

## Current Total Imports

	In Canadian \$
i) OUTERWEAR	\$ 21.90 M
ii) OUTDOOR JACKETS	\$ 20.60 M
iii) ACCESSORIES	\$ 17.90 M
iv) PANTS	\$ 10.20 M
v) SUITS	\$ 7.40 M
vi) SKIRTS	\$ 5.40 M

The Trade Office reports that the following factors influence Canadian  
export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be moderate

## Export and Investment Promotion Planning System

MISSION: 612 WASHINGTON

COUNTRY: 577 UNITED STATES OF AMERICA

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- the unsuitability of Canadian products for this market
- the apparent limited sectoral capability in Canada compared to other competing export countries
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

- the adequacy of exporter information in Canadian Directories

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

**Activity:** ESTABLISH A DATABASE OF PRODUCT-SPECIFIC APPAREL RETAILERS, BUYERS IN TERRITORY, IE. SHOES, LINGERIE, MENSWEAR, FURS, ACCESSORIES, ETC.

**Results Expected:** ASSIST CANADIAN MANUFACTURERS TO PENETRATE MARKET THROUGH QUALIFIED CONTACTS.

**Activity:** ARRANGE BUYERS LUNCHEON/RECEPTION AND SHOWROOM FOR SELECTED LINES, ACCESSORIES

**Results Expected:** PROMOTE AND SHOWCASE CANADIAN REGIONAL DESIGNERS/MANUFACTURERS



## Export and Investment Promotion Planning System

BB/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 612 WASHINGTON

Market: 577 UNITED STATES OF AMERICA

Sector: 013 CONSUMER PRODUCTS

Subsector: 135 FURNITURE &amp; APPLIANCES

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	3100.00M	\$ 2900.00M	\$ 2700.00M	\$ 2600.00M
Canadian Exports \$	24.60M	\$ 23.50M	\$ 22.80M	\$ 20.00M
Canadian Share of Import Market	0.01%	0.01%	0.01%	0.01%

## Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	086 %
ii) 434 TAIWAN	008 %
iii) 075 CANADA	004 %
iv) 237 ITALY	001 %
v) 093 DENMARK	001 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 60-100 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) WOODEN HOUSEHOLD FURNITURE	\$ 96.50 M
ii) UPHOLSTERED HOUSEHOLD FURNITURE	\$ 49.00 M
iii) FURNITURE FRAMES	\$ 17.00 M
iv) POLYURETHANE/PLASTICS	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- the unsuitability of Canadian products for this market
- the apparent limited sectoral capability in Canada compared to other competing export countries
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

## Export and Investment Promotion Planning System

MISSION: 612 WASHINGTON

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market.

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

- the adequacy of exporter information in Canadian Directories

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: CONTACT TERRITORY FURNITURE REPS TO DETERMINE THEIR POTENTIAL INTEREST/CAPABILITY TO HANDLE CANADIAN LINES.

Results Expected: ASSIST CANADIAN MANUFACTURERS TO PENETRATE MARKET AND PROMOTE PRODUCTS

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ESTABLISH COMPUTERIZED DATABASE OF TERRITORY FURNITURE REPRESENTATIVES QUALIFIED/ABLE TO HANDLE CANADIAN LINES.

Results Expected: INCREASE NUMBER OF REPRESENTATIVES IN TERRITORY ABLE TO PROMOTE AND GENERATE SALES FOR CANADIAN MANUFACTURERS.

Activity: ARRANGE POST-INITIATED INCOMING FACTORY TOUR FOR TERRITORY AGENTS /DISTRIBUTORS

Results Expected: INCREASE AWARENESS OF CANADIAN PRODUCT AND POTENTIAL FOR EXPANDED SALES.

Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 612 WASHINGTON

Country: 577 UNITED STATES OF AMERICA

## Highlights of Investment Environment

Estimated Value Of Equity Investment  
In Canada From This Post Territory:

\$ 2 790.00 M

Estimated Value Of Annual Direct Equity  
Investments To All Destinations From  
This Post Territory:

\$ 6 354.00 M

Country Destinations Of Direct  
Equity Investment From Post  
TerritoryEstm. Value  
\$ CDN% Of Annual Direct Equity  
Investment Outflows By  
Category Of Investors

1. 075 CANADA	\$ 6 354.00 M	1. Corporations : 80.00 %
2. 051 UNITED KINGDOM	\$ 4 050.00 M	2. Institutional : 5.00 %
3. 512 SWITZERLAND	\$ 2 106.00 M	3. Entrepreneurs : 10.00 %
4. 128 GERMANY WEST	\$ 1 917.00 M	4. Immigrant Entr.: 5.00 %

The Mission Has Reported Factors That Tend To Change  
Outward Flows Of Investment From The Post Territory Including:

- Emigration
- Corporate Search For Cheaper Production And/Or Operating Costs  
Outside The Country
- Corporate Expansion To Seek New Markets
- Corporate Expansion To Serve Better Existing Markets

The Mission Reports That Investors From The Post Territory Who Invest Abroad  
In Manufacturing Tend To Invest In The Following Sector(s) Subsector(s)

## -SECTOR(S)-

1. 012 PETROCHEM & CHEM PROD, EQP, SERV
2. 014 EDUCATION, MEDICAL, HEALTH PROD
3. 006 ELECTRONICS EQUIP. & SERV

## -SUBSECTOR(S)-

- 121 CHEM & PETROCHEM PRODUCTS
- 141 PHARMACEUTICALS, BIOTECHNOLOGY
- 062 INSTRUMENTATION

DATE: 88/01/25

DEPARTMENT OF EXTERNAL AFFAIRS

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 612 WASHINGTON

Country: 577 UNITED STATES OF AMERICA

**Equity Propensity Of Key Sources Of Investment From This Territory**

Corporations : 100% Ownership Of Existing Corporate Facility  
Institutional :  
Entrepreneurs : Start-up Investment To Create New Enterprise (100% Ownership)  
Immigrant Entr.: Partial Ownership Of Existing Corporate Facilities With Direct  
Involvement In Day-to-Day Operations

**Sector Preferences By Type Of Key Investors**

Corporations :  
Institutional : Portfolio Investment  
Entrepreneurs :  
Immigrant Entr.:

**Investment Promotion Priority Sectors Sub-Sectors  
Program Plans And Anticipated Results.**

Sector : 006 ELECTRONICS EQUIP. & SERV  
Subsector: 062 INSTRUMENTATION

**Reason(s):**

POST TERRITORY CONTAINS MAJOR CONCENTRATIONS OF INSTRUMENTATION MANUFACTURERS AND TECHNOLOGICAL DEVELOPERS.

**Program Plans:**

COVER A NUMBER OF ELECTRONICS/INSTRUMENTATION TRADE SHOWS TO IDENTIFY MAJOR SUPPLIERS AND DEVELOP EXPANSION PLAN/MARKET INTEREST PROFILES

**Anticipated Results:** IDENTIFY GOOD PROSPECTS & FOLLOW-UP WITH INVESTMENT INFORMATION. ADVISE HEADQUARTERS AND ESTABLISH LIAISON LINES AS APPROPRIATE

Sector : 016 INDUSTRIAL MACHIN. PLANTS, SERV.  
Subsector: 161 MANUFACT & MATERIAL PLANT, EQP.

**Reason(s):**

MID-ATLANTIC STATES REMAIN HOME TO MORE THAN 90% OF ALL STANDARD INDUSTRIAL CLASSIFICATIONS; MOST MANUFACTURERS ENJOY PRODUCTIVITY GROWTH ABOVE THE U. S. AVERAGE

DATE: 88/01/25

DEPARTMENT OF EXTERNAL AFFAIRS

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 612 WASHINGTON

Country: 577 UNITED STATES OF AMERICA

Investment Promotion Priority Sectors Sub-Sectors  
Program Plans And Anticipated Results.

Sector : 016 INDUSTRIAL MACHIN, PLANTS, SERV.

Subsector: 161 MANUFACT & MATERIAL PLANT, EGP.

Program Plans:

THROUGH CORPORATE LIAISON CALLS ON TERRITORY FIRMS HAVING KNOWN EXPORT BUSINESS IN CDA. POST WILL ENCOURAGE THE ESTABLISHMENT OR EXPANSION OF SUBSIDIARY OPERATIONS AND/OR THE ADDITION OF CANADIAN CONTENT TO MARKETING EFFORTS IN CANADA.

Anticipated Results: ESTABLISH A DIALOGUE WITH A NUMBER OF TERRITORY CORPORATIONS WITH EXPANSION POTENTIAL

Other Investment Program Plans

Activity(ies):

CONTINUE PROGRAM OF EDUCATION & INFORMATION DIRECTED AT INVESTMENT "INFLUENCERS" SUCH AS INT'L BANKERS, PORTFOLIO MANAGERS, INVESTMENT BROKERS AND ANALYSTS, INTERNATIONAL LAWYERS, ETC.

Anticipated Results: INFLUENCE INVESTORS THROUGH THEIR PRINCIPAL ADVISERS

DATE: 88/01/25

DEPARTMENT OF EXTERNAL AFFAIRS

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 612 WASHINGTON

Country: 577 UNITED STATES OF AMERICA

Investment Promotion Activities Proposals

Type Of Event: 072 OUTGOING MISSION

Description: CANADA VISITS VIRGINIA

Priority: 1

Date: 06/88

Sector: 999 MULTIPLE SECTORS

Sub-Sector: 999 ALL SUB-SECTORS

Location: RICHMOND, VIRGINIA

## Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 612 WASHINGTON		
Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV		
020 MISSION OUTGOING		
AVIATION SUPPLY OFFICE COMP. & CONTR. FAIR	PHILADELPHIA	0590
DEFENSE INDUSTRIAL SUPPLY CTR-COMP. & CONT. FAIR	PHILADELPHIA	0490
NAVAL AIR DEVEL. CTR. NEW TECH DEMON. MISSION	WARMINSTER	0390
COMMAND BRIEFING (SHIP PARTS, CONTROL CTR, DEFENCE	PHILADELPHIA	0190
CIDEX '89 - COMP. & SUB-COMP. SUPPLIER FAIR	PHILADELPHIA	1089
SHIPS PARTS CONTROL CENTER COMP & CONT FAIR	MECHANICSBURG	0589
DEFENCE GENERAL SUPPLY CTR. COMP. & CONT. FAIR	RICHMOND	0489
024 MISSION INCOMING		
DEFENCE GENERAL SUPPLY CTR. SUPPLIER IDEN. MISSION	CALGARY/VANCOUVER	0789
AVIATION SUPPLY OFFICE SUPPLIER IDEN. MISSION	TORONTO/MONTREAL	0689
SOURCE ONTARIO-SUPPLIER ID BOOTHS - 4 CENTERS	TORONTO	1189
DEFENSE INDUSTRIAL SUPPLY CTR - SUPPLIER IDEN. MIS	LONDON/EDMONTON	0290
PRIME CONTRACTOR BUYING MISSION	TORONTO/MONTREAL	0690
SHIPS PARTS CONTROL CTR. SUPPLIER IDEN. MISSION	TORONTO/MONTREAL	1190
DEFENCE GENERAL SUPPLY CTR SUPP. IDEN. MISSION	WINDSOR/EDMONTON	0990

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 609 PHILADELPHIA

Market: 577 UNITED STATES OF AMERICA

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Subsector: 041 AEROSPACE &amp; MARINE

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	6500.00M	\$ 6250.00M	\$ 4140.00M	\$ 5150.00M
Canadian Exports \$	47.00M	\$ 36.90M	\$ 22.30M	\$ 26.60M
Canadian Share of Import Market	1.00%	1.00%	1.00%	1.00%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	097 %
ii) 112 FRANCE	001 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Small but expanding

Products/services for which there are  
good market prospects

## Current Total Imports

	In Canadian \$
i) AIRFRAME PARTS AND ASSEMBLIES	\$ 70.00 M
ii) ELECTRONIC SUB-ASSEMBLIES	\$ 45.00 M
iii) CIRCUIT CARD ASSEMBLIES	\$ 32.60 M
iv) MARINE HARDWARE	\$ 30.00 M
v) WIRING HARNESSSES	\$ 28.00 M
vi) MECHANICAL EQUIPMENT REPAIR AND OVERHAUL	\$ 25.00 M
vii) RADAR EQUIPMENT COMPONENTS	\$ 21.50 M
viii) DISPLAYS INSTRUMENTATION	\$ 16.40 M
ix) VALVES	\$ 13.50 M
x) ELECTRONIC EQUIPMENT REPAIR AND OVERHAUL	\$ 12.00 M

Projects or portion of projects which are still in the planning  
stage and for which Canadian companies might have reasonable prospects.

i) Project Name: BOEING HELICOPTERS - V-22 AIRCRAFT DEVE-  
LOPMENT AND PRODUCTION

Approximate Value: \$ 35000 M

Financing Source: 012 DOM

For further info. please contact:

JAMES S. A. SOTVEDT



## Export and Investment Promotion Planning System

MISSION: 609 PHILADELPHIA

COUNTRY: 577 UNITED STATES OF AMERICA

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

ii) Project Name: PHILA. NAVY SHIP YARD - CARRIER SLEP PROGRAM

Approximate Value: \$ 900 M  
 Financing Source: 012 DOM  
 For further info. please contact:  
 JAMES S. A. SOTVEDT

iii) Project Name: NEWPORT NEWS SHIPBUILDING SSN 688 SUB-MARINE CONSTRUCTION

Approximate Value: \$ 2500 M  
 Financing Source: 012 DOM  
 For further info. please contact:  
 JAMES S. A. SOTVEDT

iv) Project Name: NAVY "BREAKOUT" PROGRAMS WITH ASD AND SPCC

Approximate Value: \$ 1000 M  
 Financing Source: 012 DOM  
 For further info. please contact:  
 JAMES S. A. SOTVEDT

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- there are import restrictions which can present significant problems

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- non-tariff protectionist measures which are difficult to overcome
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters
- other factor(s) described by the Trade Office as follows:  
 GENERAL PERCEPTION ON THE PART OF EXPORTERS THAT BUREAUCRATIC IMPEDIMENTS MADE MARKET PENETRATION OVERLY DIFFICULT.

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada
- the existence of a bilateral economic/trade arrangement between Canada and this country

Export and Investment Promotion Planning System

MISSION: 609 PHILADELPHIA

COUNTRY: 577 UNITED STATES OF AMERICA

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ESTABLISHMENT OF AN OFFICE CONTACTS MANAGEMENT DATABASE- COMPILATION OF PRIME CONTRACTOR AND MAJOR SUB-CONTRACTOR INFO INCLUDING MAJOR CONTRACTS AND POINTS OF CONTACT.

Results Expected: ANNUAL PUBLICATION OF TERRITORY CONTRACTOR (MANUFACTURERS/AGENCY PROFILE FOR DISTRIBUTION TO INDUSTRY.

Activity: DEFENSE PROCUREMENT AGENCY BUYING FORECAST IDENTIFICATION- PROVIDING 12 MONTH BUYING PROJECTIONS TO CANADIAN SUPPLIERS TO BETTER TARGET MARKETING PLANS.

Results Expected: ENHANCED TARGETING OF SUPPLIERS FOR POST INITIATED (NTS) DEFENSE PROCUREMENT EVENTS (INCOMING MISSIONS)

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 609 PHILADELPHIA

Market: 577 UNITED STATES OF AMERICA

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Subsector: 044 OTHER DEFENSE PROD &amp; SERV.

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	3800.00M	\$ 3800.00M	\$ 2600.00M	\$ 2200.00M
Canadian Exports \$	30.00M	\$ 20.00M	\$ 11.00M	\$ 10.00M
Canadian Share of Import Market	1.00%	1.00%	1.00%	1.00%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA

099 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector:

100 \$M AND UP

Current status of Canadian exports:

Small but expanding

Products/services for which there are  
good market prospects

Current Total Imports

In Canadian \$

i) ELECTRICAL WIRE AND CABLE	\$ 75.50 M
ii) MISC. HARDWARE (INCLUDING PADLOCKS)	\$ 75.00 M
iii) PACKING AND GASKET MATERIALS	\$ 60.80 M
iv) BOLTS	\$ 29.60 M
v) EDUCATION SUPPLIES AND SERVICES	\$ 8.00 M
vi) POLE LINE HARDWARE	\$ 6.50 M

Projects or portion of projects which are still in the planning  
stage and for which Canadian companies might have reasonable prospects.i) Project Name: MAJOR EQUIP & SUB-COMPONENT "BREAKOUT"  
PROGRAMS AT DISC AND DGSC

Approximate Value: \$ 300 M

Financing Source: 012 DOM

For further info. please contact:

JAMES S. A. SOTVEDT

## Export and Investment Promotion Planning System

MISSION: 609 PHILADELPHIA

COUNTRY: 577 UNITED STATES OF AMERICA

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- there are import restrictions which can present significant problems

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- non-tariff protectionist measures which are difficult to overcome
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters
- other factor(s) described by the Trade Office as follows:

THERE IS A PERCEPTION BY MANY EXPORTERS THAT PROCUREMENT METHODS ARE ARCAIC IN THE U.S. DEFENSE DEPARTMENT BUYING AGENCIES AS WELL AS WIDE SPREAD IGNORANCE OF THE SCOPE AND POTENTIAL THEY OFFER.

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada
- the existence of a bilateral economic/trade arrangement between Canada and this country

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: DEFENCE PROCUREMENT AGENCY BUYING FORECAST PROJECT - USING 12 MONTH INDIVIDUAL PRODUCT BUY FORECASTS TO PERMIT CANADIAN SUPPLIERS TO BETTER TARGET DLA MARKETS.

Results Expected: PROGRAM IN COORDINATION WITH NTS EVENTS WILL YIELD 24 BUYING CONNECTIONS ANNUALLY.

## Export and Investment Promotion Planning System

88/89 Trade and Economic Overview

Mission: 618 MINNEAPOLIS

Country: 577 UNITED STATES OF AMERICA

CDN EXPORTS TO THE 6 STATES COVERED BY OUR MPLS POST TOTALED 4.37 BN IN 86 OR APPROX. 5% OF CDA'S WORLD WIDE EXPORTS. THESE FIGURES WERE DOWN APPROX. 20% FM THE PREVIOUS YRS RECORD TOTAL OF \$5.7 BN PRIMARILY DUE TO A MAJOR REDUCTION OF CRUDE PETROLEUM AND NATURAL GAS EXPORTS. ECONOMIC GROWTH IN THE REGION AS A WHOLE SLOWED SOMEWHAT DURING THE PAST YEAR & IS EXPECTED TO SHOW ONLY MODEST IMPRVMT OVER THE NEAR TO MEDIUM TERM. THERE ARE, HOWEVER, SOME SIGNS THAT THE AGRI. & ENERGY SECTORS ARE IN THE PROCESS OF RECOVERY WHICH CLD RESULT IN A MORE POSITIVE ECONOMIC PERFORMANCE THROUGHOUT OUR TERRITORY OVER THE NEXT FISCAL YR. MPLS/ST. PAUL CONTINUES TO PROSPER & BOASTS ONE OF THE LOWEST UNEMPLOYMENT RATES IN THE COUNTRY. DES MOINES & OMAHA EXPERIENCED STRONG RECOVERY LAST YR WHICH IS EXPECTED TO CONTINUE IN 88/89. THE PROMO'N OF THE U. S. /CDA TRADE AGREEMENT HAS BEEN THE NO. ONE TRADE PRIORITY FOR THE POST DURING THE LAST 6 MTHS & MAY WELL PREOCCUPY OUR EFFORTS IN 88/89. SUPPORT FOR THE AGREEMENT IS STRONG IN MINNESOTA BUT UNEVEN ELSEWHERE THROUGHOUT OUR TERRITORY, PRIMARILY DUE TO AGRI. CONCERNS. THE UPPER MIDWEST IS ONE OF THE LARGEST IMPRTRS OF CDN OIL, GAS & ELECTRICITY. THREATS TO RESTRICT ELECTRICITY IMPORTS FM CDA IS A MAJOR CONCERN & WILL OCCUPY THE POSTS ATT'N OVER THE NEXT F. Y. THE GOVERNOR OF N. DAKOTA, GEORGE SINNER, IS HEADING UP A COALITION AGAINST UNFAIR CDN ELECTRICITY EXPORTS & CAN BE EXPECTED TO REMAIN VOCAL ON THIS ISSUE. FARM MACHINERY EXPORTS TO THE REGION SHLD SHOW SOME IMPRVMT IN 88/89 & WILL CONTINUE TO REPRESENT THE LARGEST MKT IN THE WORLD FOR CDN MFTRS OF FARM IMPLEMENTS. SALES PROSPECTS FOR SHORT LINE EGPT ARE PARTICULARLY PROMISING. A DECISION CONCERNING THE PROPOSED LRT SYSTEM FOR MPLS/ST. PAUL HAS YET TO BE MADE BUT COULD BE REACHED WITHIN THE NEXT YEAR OR SO. SHLD THE PROJ. BE APPROVED A GROUP SPEARHEADED BY BOMBARDIER ARE FRONT RUNNERS TO WIN THIS FIVE HUNDRED MN \$ PLUS PROJECT. THE TWIN CITIES AREA REMAINS THE 3RD LARGEST HIGH-TECH CENTER IN THE U. S. & IS THE HDQRTRS OF SUCH WELL KNOWN FIRMS AS CONTROL DATA, CRAY RESEARCH, MEDTRONICS, H. B. FULLER, ST. JUDE MEDICAL, 3M, HUTCHINSON TECH., DELUXE CHECK PRINTERS, HONEYWELL & DATA CARD CORP. THIS SECTOR OFFERS EXCELLENT MKT POTEN'L FOR CDN MFTRS OF PRODS OR COMPONENTS IN THE MEDICAL, ELECTRONICS & TELECOM FIELDS. NEW POST INITIATIVES PLANNED FOR 88/89 INCLUDE NEBS MISSIONS IN THE FOLLOWING SECTORS: APPAREL, FOOD PRODS, BLDG PRODS, ELECTRONIC COMPONENTS & FARM MACHINERY PLUS INCOMING MISSIONS IN THE OFFICE FURNITURE & DEF. PROD. SECTORS. MAJOR IMPACT VISITS ARE ALSO PLANNED TO NEBRASKA, MONTANA, & N. DAKOTA. THROUGH CLOSE COOP'N WITH DRIE, THE PROV. & INVSTMNT CDA A STEPPED UP INVSTMT IND'L DVLPMNT PROG. WILL BE UNDERTAKEN FOCUSING ON THE HIGH TECH, MEDICAL & AGRI-BUSINESS SECTORS AS WELL AS ON THE 23 FORTUNE 500 FIRMS LOCATED IN OUR TERRITORY.

## Export and Investment Promotion Planning System

REPT: SYN-GEO 88/89 A. Post export program priorities

Region: UNITED STATES

Mission: 618 MINNEAPOLIS

Market: 577 UNITED STATES OF AMERICA

The Mission selected the following sectors as priority areas for export promotion activities for the coming fiscal year:

## 1. 001 AGRI &amp; FOOD PRODUCTS &amp; SERVICE

REASONS: A) FARMING PRACTICES IN REGION ARE SIMILAR TO THOSE IN W. CDA. THE MKT BY CDN FARM MACHINERY IS STRONG, CLOSE & EASILY ACCESSIBLE. B) MPLS IS MAJOR U.S. FOOD & BEVERAGE DISTRIBUTION CENTRE.

## 2. 013 CONSUMER PRODUCTS

REASONS: MINNEAPOLIS IS MAJOR REGIONAL DISTRIBUTION CENTRE AND IS ALSO HEAD-QUARTERS OF ONE OF THE LARGEST U.S. RETAILERS, THE DAYTON/HUDSON CORPORATION.

## 3. 005 COMM. &amp; INFORM. EQP. &amp; SERV

REASONS: THE TWIN CITIES AREA IS ONE OF THE MAIN U.S. HIGH TECH CENTRES FOR A VARIETY OF ELECTRONICS PRODS & OFFER EXCELLENT MKT POTEN'L FOR COMPONENTS PRINTED CIRCUIT BOARDS, SEMI-CONDUCTORS ETC.

## 4. 004 DEFENCE PROGRAMS, PRODUCTS, SERV

REASONS: DEFENCE CONTRACTORS IN REGION SUCH AS HONEYWELL, UNISYS, F.M.C. AND CONTROL DATA AND COLLINS RADIO OFFER SIGNIFICANT SUB-CONTRACT OPPORTUNITIES FOR CANADIAN FIRMS.

The most important current Canadian export sectors to this market are (based on actual export sales):

1. 007 POWER & ENERGY EQUIP. & SERV.
2. 009 FOREST PRODUCTS, EQUIP, SERVICES
3. 011 OIL & GAS EQUIPMENT, SERVICES

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 618 MINNEAPOLIS

Market: 577 UNITED STATES OF AMERICA

Sector: 001 AGRI &amp; FOOD PRODUCTS &amp; SERVICE

Subsector: 015 SEMI &amp; PROCESSED FOOD &amp; DRINK

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1.36M	\$ 1.34M	\$ 1.32M	\$ 1.30M
Canadian Exports \$	45.00M	\$ 44.00M	\$ 43.00M	\$ 42.00M
Canadian Share of Import Market	3.00%	3.00%	3.00%	3.00%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	000 %
ii) 349 MEXICO	000 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

- i) PROCESSED SPECIALTY FOODS
- ii) BEER AND SPIRITS

In Canadian \$	
\$	7.60 M
\$	6.30 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies

## Export and Investment Promotion Planning System

MISSION: 618 MINNEAPOLIS

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: IN COOPERATION WITH WESTERN CDN. DRIE OFFICES, DEVELOP EDUCATIONAL SEMINARS/NEBS MISSIONS FOR PROSPECTIVE FOOD PRODUCTS EXPORTERS.

Results Expected: ENHANCED EXPORT READINESS FOR SMALL MANUFACTURERS.

Activity: EXPLORE POSSIBILITIES OF FOOD SALES TO MILITARY THROUGH SUPER VALU DISTRIBUTION SYSTEM.

Results Expected: MARKET PENETRATION.



## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 618 MINNEAPOLIS

Market: 577 UNITED STATES OF AMERICA

Sector: 001 AGRI &amp; FOOD PRODUCTS &amp; SERVICE

Subsector: 016 AGRICULTURE MACH, EQUIP, TOOLS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	727.00M	\$ 698.00M	\$ 572.00M	\$ 545.00M
Canadian Exports \$	135.00M	\$ 124.00M	\$ 119.00M	\$ 113.00M
Canadian Share of Import Market	18.60%	17.80%	20.80%	20.70%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	058 %
ii) 265 JAPAN	009 %
iii) 128 GERMANY WEST	005 %
iv) 051 UNITED KINGDOM	005 %
v) 237 ITALY	003 %
vi) 112 FRANCE	002 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Market share declining

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) GRAIN HANDLING & STORAGE EQUIPMENT	\$ 2.20 M
ii) TRUCK BODIES	\$ 1.60 M
iii) TILLAGE EQUIPMENT	\$ 17.90 M
iv) LIVESTOCK EQUIPMENT	\$ 1.00 M
v) TILLAGE EQUIPMENT MINIMUM TILL-NO TILL	\$ 5.50 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- other factor(s) described by the Trade Office as follows:  
LACK OF CANADIAN PRODUCTS SUITABLE FOR ROW CROP AGRICULTURE.

## Export and Investment Promotion Planning System

MISSION: 618 MINNEAPOLIS

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: FARM EQUIPMENT SEMINAR MINOT, NORTH DAKOTA, JAN '88.

Results Expected: INCREASED EFFECTIVENESS OF FARM EQUIPMENT MANUFACTURERS PARTICIPATION IN THE NORTH DAKOTA MARKET.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 618 MINNEAPOLIS

Market: 577 UNITED STATES OF AMERICA

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Subsector: 043 ELECTRICAL &amp; ELECTRONIC

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	226.00M	\$ 219.00M	\$ 210.00M	\$ 217.00M
Canadian Exports \$	16.00M	\$ 15.00M	\$ 14.00M	\$ 19.00M
Canadian Share of Import Market	6.90%	6.80%	6.70%	7.80%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	084 %
ii) 265 JAPAN	006 %
iii) 434 TAIWAN	002 %
iv) 268 KOREA	001 %
v) 232 ISRAEL	001 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 15-30 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) PRINTED CIRCUIT BOARDS	\$ 11.00 M
ii) CONNECTORS	\$ 6.00 M
iii) CASTINGS	\$ 6.00 M
iv) CAPACITORS	\$ 10.00 M
v) RESISTORS	\$ 7.00 M
vi) TRANSFORMERS	\$ 5.00 M

Projects or portion of projects which are still in the planning  
stage and for which Canadian companies might have reasonable prospects.

i) Project Name: TISS(HONEYWELL PROJ-TACTICAL ELECTR. WAR-  
FARE SYST. INTERMEDIATE SUPPORT SYSTEM

Approximate Value: \$ M

Financing Source: 012 DOM

For further info. please contact:

P. BELANGER(612)333-4641 C. MCGRIF (612)333-4641

## Export and Investment Promotion Planning System

MISSION: 618 MINNEAPOLIS

COUNTRY: 577 UNITED STATES OF AMERICA

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

## ii) Project Name: VLS-VERTICLE LAUNCH SYSTEM

Approximate Value: \$ M

Financing Source: 012 DOM

For further info. please contact:

P. BELANGER (612)333-4641 C. MCGRIFF (612)333-4641

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- the apparent limited sectoral capability in Canada compared to other competing export countries
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- other factor(s) described by the Trade Office as follows:  
PROPENSITY OF CANADIAN FIRMS NOT TO INVEST IN DEVELOPING LONG TERM VENDOR/CUSTOMER RELATIONSHIPS PRIOR TO BIDDING ON DEFENCE CONTRACTS.

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade fairs
- competitive export pricing for this market
- the existence of a bilateral economic/trade arrangement between Canada and this country

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: PREPARE SURVEY OF OPPORTUNITIES AT DEFENCE COMPANIES IN SECTOR/ SUB-SECTOR.

Results Expected: DEVELOP INCREASED INTEREST AND NUMBER OF CDN FIRMS CONTACTING DEFENCE CONTRACTORS IN TERRITORY.

Export and Investment Promotion Planning System

MISSION: 618 MINNEAPOLIS

COUNTRY: 577 UNITED STATES OF AMERICA

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: HOLD PROCUREMENT SEMINAR FOR HONEYWELL DEFENCE PRODUCTS DIVISION.

Results Expected: CURRENT DISCUSSIONS INDICATE A PREFERENCE BY HONEYWELL FOR AN INCOMING MISSION WHICH WILL ID ADDITIONAL QUALIFIED VENDORS.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: CONDUCT CORPORATE LIAISON TYPE CALLS WITH PRIME CONTRACTORS AND SUB CONTRACTORS IN TERRITORY.

Results Expected: INCREASE AWARENESS OF DEFENCE CONTRACTORS IN CANADIAN CAPABILITIES FOR THE SECTOR.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 618 MINNEAPOLIS

Market: 577 UNITED STATES OF AMERICA

Sector: 005 COMM. &amp; INFORM. EQP. &amp; SERV

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	2392.00M	\$ 2175.00M	\$ 2088.00M	\$ 2050.00M
Canadian Exports \$	100.00M	\$ 91.00M	\$ 84.00M	\$ 87.00M
Canadian Share of Import Market	4.20%	4.20%	4.20%	4.20%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	051 %
ii) 265 JAPAN	011 %
iii) 349 MEXICO	004 %
iv) 268 KOREA	003 %
v) 434 TAIWAN	003 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports  
In Canadian \$

i) PRINTED CIRCUIT BOARDS	\$ 32.00 M
ii) CONNECTORS	\$ 16.00 M
iii) INTEGRATED CIRCUITS	\$ 367.00 M
iv) CASTINGS	\$ 13.00 M
v) POWER SUPPLIES	\$ 14.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

## Export and Investment Promotion Planning System

MISSION: 618 MINNEAPOLIS

COUNTRY: 577 UNITED STATES OF AMERICA

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- other factor(s) described by the Trade Office as follows:  
CONTINUING LACK OF SUSTAINED MARKETING SALES EFFORT BY CANADIAN FIRMS.

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade fairs
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: DEVELOP TRADE INFORMATION MAILING ON REGULAR PERIODIC BASIS USING "NEWSLETTER" FORMAT.

Results Expected: INTRODUCE CDN VENDORS AS AN OPPORTUNITY FOR SALES REPS. TO INCREASE BUSINESS AND FIRMS TO OBTAIN COMPETITIVE SOURCES.

Activity: HOLD SALES REPRESENTATIVE CONFERENCE IN IOWA AND NEBRASKA.

Results Expected: INCREASE THE NUMBER OF SALES REPS/AGENTS CARRYING CANADIAN LINES.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: DEVELOP SEMINAR ON UTILIZING CANADIAN SOURCES FOR PRESENTATION TO TWIN CITY PURCHASING MGMT. ASSOC.

Results Expected: INCREASE NUMBER OF COMPANIES USING CANADIAN SOURCING.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 618 MINNEAPOLIS

Market: 577 UNITED STATES OF AMERICA

Sector: 013 CONSUMER PRODUCTS

Subsector: 131 APPAREL (CLOTH, FUR, SHOES) TEXT

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1060.00M	\$ 1040.00M	\$ 1010.00M	\$ 1020.00M
Canadian Exports \$	25.00M	\$ 23.00M	\$ 22.00M	\$ 20.00M
Canadian Share of Import Market	2.40%	2.20%	2.20%	2.00%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	050 %
ii) 189 HONG KONG	014 %
iii) 268 KOREA	009 %
iv) 434 TAIWAN	009 %
v) 192 PEOPLE'S REP OF CHINA	005 %
vi) 237 ITALY	003 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 60-100 \$M

Current status of Canadian exports: Small but expanding

## Products/services for which there are good market prospects

## Current Total Imports

## In Canadian \$

i) FURS	\$ 6.10 M
ii) TEXTILES	\$ 4.90 M
iii) FOOTWEAR	\$ 3.30 M
iv) OUTERWEAR	\$ 2.20 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- there are import restrictions which can present significant problems
- the degree of import duty protection of local industry tends to be moderate



## Export and Investment Promotion Planning System

MISSION: 618 MINNEAPOLIS

COUNTRY: 577 UNITED STATES OF AMERICA

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- high tariffs
- other factor(s) described by the Trade Office as follows:  
 PROBLEMS WITH CDN COMPANIES ADAPTING TO AGGRESSIVE U.S. MARKET.  
 CDN FIRMS MUST COMMIT TO U.S. BY ESTABLISHING A SOLID PRESENCE  
 (VIA REP OR SHOWROOM) AND MUST FOLLOW-UP W/TIMELY DELIVERIES.  
 CDN FIRMS SHOULD OFFER UNIQUE ITEMS AT A PRICE TO COMPETE IN US

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: FOLLOW UP WITH 1987 FESTIVAL OF CDN. FASHION WITH DIRECT MAIL CAMPAIGN TO KEY CLOTHING BUYERS AND SHOW F. O. C. F. VIDEOTAPE.

Results Expected: INCREASE BUYER AWARENESS OF CDN. FASHION.

Activity: CANADIAN FASHION IN-STORE PROMOTION AT CEDRIC'S (OCT. 15 THROUGH NOV. 15, 1987).

Results Expected: PROMOTE SALES OF CDN. FASHION AND FURS TO CONSUMERS.

Activity: RECRUIT BUYERS FOR 1988 FESTIVAL OF CANADIAN FASHION (TORONTO, MARCH, 1988).

Results Expected: PROMOTE SALES OF CDN. CLOTHING (ESPECIALLY "DESIGNER" FASHION).

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: WORK IN COOPERATION WITH NY CONGEN TO INFORM KEY BUYERS IN MNPLS. TERRITORY OF CDN. SHOWROOMS AND REPS BASED IN NY.

Results Expected: EXPAND MARKETING RANGE FOR CDN. CLOTHING EXPORTERS. PROMOTE SALES OF CDN. FASHION.

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DEPARTMENT OF EXTERNAL AFFAIRS

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Export and Investment Promotion Planning System

MISSION: 618 MINNEAPOLIS

COUNTRY: 577 UNITED STATES OF AMERICA

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ASSESS FEASIBILITY OF APPAREL NEBS MISSIONS AND CDN. FASHION EXHIBIT AT CONSULATE.

Results Expected: PROVIDE CDN. CLOTHING MFCTRS. WITH MULTIPLE WAYS TO START EXPORTING.

Activity: GENERATE DIRECTORY OF RETAILERS IN MNPLS. POST TERRITORY.

Results Expected: PROVIDE LIST TO DISTRIBUTE TO CDN. MFCTRS. LOOKING TO SELL IN TERRITORY. ALSO, USE FOR TARGETED MAILINGS BY POST.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 618 MINNEAPOLIS

Market: 577 UNITED STATES OF AMERICA

Sector: 013 CONSUMER PRODUCTS

Subsector: 134 LEISURE PROD. TOOLS HARDWARE

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	405.00M	\$ 401.00M	\$ 399.00M	\$ 397.00M
Canadian Exports \$	45.00M	\$ 44.00M	\$ 43.00M	\$ 43.00M
Canadian Share of Import Market	11.10%	11.00%	10.80%	10.80%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	060 %
ii) 434 TAIWAN	015 %
iii) 265 JAPAN	008 %
iv) 128 GERMANY WEST	002 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Small but expanding

## Products/services for which there are good market prospects

## Current Total Imports

	In Canadian \$
i) METAL FASTENERS	\$ 12.40 M
ii) HOCKEY RELATED PRODUCTS	\$ 10.00 M
iii) LAWN/GARDEN PRODUCTS	\$ 3.70 M
iv) CUTTING TOOLS/PARTS	\$ 1.40 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- non competitive pricing
- the unsuitability of Canadian products for this market
- the apparent limited sectoral capability in Canada compared to other competing export countries
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- other factor(s) described by the Trade Office as follows:  
UNWILLINGNESS OF SOME CDN. EXPORTERS TO USE LOCAL SALES REPRESENTATIVES; PROBLEMS WITH DELIVERY. INHERENT DIFFICULTY OF MARKETING ONE-ITEM LINES TO AGENTS AND BUYERS.

## Export and Investment Promotion Planning System

MISSION: 618 MINNEAPOLIS

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: DIRECT MAIN CAMPAIGN TO KEY HARDWARE BUYERS TO PROMOTE CDN. HARDWARE TRADE SHOW IN TORONTO (FEB. 1988)

Results Expected: PROMOTE EXPOSURE AND SALES OF CDN. HARDWARE PRODUCTS TO LOCAL TRADE.

Activity: DIRECT MAIL/TELEPHONE CAMPAIGN TO KEY SPORTING GOODS BUYERS TO PROMOTE CSGA SHOW (MONTREAL, FEB. 1988). ALSO RECRUIT BUYERS FOR INCOMING MISSION.

Results Expected: INCREASE SALES OF CDN. SPORTING GOODS RELATED PRODUCTS IN POST TERRITORY.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: COMPILE DIRECTORY OF HARDWARE RETAILERS IN POST TERRITORY.

Results Expected: SINGLE SOURCE OF REFERENCE FOR POST'S USE AS WELL AS THAT OF NEW AND ESTABLISHED CDN. EXPORTERS.

Activity: MEET INDIVIDUALLY OR AS A GROUP WITH HARDWARE/HOUSEWARE KEY CONTACTS (REPS AND BUYERS) TO ACCESS MOST EFFECTIVE METHOD OF REACHING THE LOCAL TRADE.

Results Expected: WILL TREMENDOUSLY HELP OUR EFFORTS IN PLANNING HARDWARE/BUILDING PRODUCTS REP LOCATOR.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 618 MINNEAPOLIS

Market: 577 UNITED STATES OF AMERICA

Sector: 013 CONSUMER PRODUCTS

Subsector: 135 FURNITURE &amp; APPLIANCES

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	180.00M	\$ 170.00M	\$ 168.00M	\$ 165.00M
Canadian Exports \$	21.00M	\$ 20.00M	\$ 20.00M	\$ 18.00M
Canadian Share of Import Market	13.00%	12.00%	12.00%	11.00%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	066 %
ii) 434 TAIWAN	016 %
iii) 237 ITALY	004 %
iv) 093 DENMARK	003 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) OFFICE FURNITURE/WOOD	\$ 10.00 M
ii) OFFICE FURNITURE/METAL	\$ 6.00 M
iii) OFFICE FURNITURE/UPHOLSTERED	\$ 3.00 M
iv) RESIDENTIAL FURNITURE	\$ 5.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- the apparent limited sectoral capability in Canada compared to other competing export countries
- difficulties of adaptation of marketing techniques to the market by some Canadian companies

## Export and Investment Promotion Planning System

MISSION: 618 MINNEAPOLIS

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: IN COLLABORATION WITH THE WINNIPEG FURNT. WEST ORGAN., DEVELOP A COMPREHENSIVE PROG. TO ADVANCE THE EXPORT READINESS OF WESTERN CDN RESIDENTIAL FURNT. MFGRS. OVER THE NEXT 5 YRS. TO INCLUDE SURVEYS, SEMINARS, NEBS MISS., INCOMING BUYERS, TRADE SHOWS.

Results Expected: ENHANCED COMPETITIVENESS, PENETRATION OF NW U.S. MARKET.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: HIGH PROFILE GALA EVENT FOR MPLS. AREA INTERIOR DESIGNERS PRIOR TO NEOCON TRADE SHOW.

Results Expected: INCREASED VISIBILITY FOR CDN. MANUFACTURERS AT NEOCDN AND IN LOCAL DESIGN COMMUNITY.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 618 MINNEAPOLIS

Market: 577 UNITED STATES OF AMERICA

Sector: 014 EDUCATION, MEDICAL, HEALTH PROD

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	200.00M	\$ 200.00M	\$ 180.00M	\$ 180.00M
Canadian Exports \$	6.40M	\$ 6.00M	\$ 5.80M	\$ 5.80M
Canadian Share of Import Market	0.03%	0.03%	0.03%	0.03%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	000 %
ii) 609 EUROPEAN COMMON MARKET C	000 %
iii) 265 JAPAN	000 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 5-15 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) MEDICAL SUPPLIES & DEVICES	\$ 0.00 M
ii) FURNITURE	\$ 0.00 M
iii) BIOTECHNOLOGY	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters
- other factor(s) described by the Trade Office as follows:

OTHER SUPPLIERS HAVE BEEN MORE EFFECTIVE IN MARKETING METHODS. CDN FIRMS (APPROX. 400 MANUFACTURERS OF MEDICAL DEVICES & 125 BIOTECH FIRMS) ARE RELATIVELY NEW TO EXPORTING IN THIS SOPHISTICATED BUT EXPANDING MKT. & NEED TO CARVE OUT SPEC. PROD. NICHES TO BE SUCC.

## Export and Investment Promotion Planning System

MISSION: 618 MINNEAPOLIS

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

- the adequacy of exporter information in Canadian Directories

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: MINNESOTA MEDICAL ALLEY RECEPTION, NOV., 1987

Results Expected: INFORM MEMBERS OF ASSOCIATION OF OPPORTUNITIES IN THE MEDICAL DEVICES SECTORS IN CANADA

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: INCREASE NUMBER OF CORPORATE LIAISON VISITS IN POST TERRITORY.

Results Expected: CREATE A NETWORK OF HEALTH CARE INDUSTRY CONTACTS IN THE TWIN CITIES.

Activity: MINNESOTA HAS A STRONG & GROWING MEDICAL/HEALTH CARE INDUSTRY WITH AN ACTIVE MEDICAL ASSOCIATION OF OVER 300 MEMBERS. THE POST WILL CONTINUE TO CULTIVATE CONTACTS IN THIS INDUSTRY.

Results Expected: DEVELOP A GREATER FAMILIARITY WITH KEY MEMBERS OF THE REGION'S MEDICAL AND HEALTH CARE INDUSTRY.



## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 618 MINNEAPOLIS

Market: 577 UNITED STATES OF AMERICA

Sector: 015 CONSTRUCTION INDUSTRY

Subsector: 151 BUILDING PRODUCTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	850.00M	\$ 835.00M	\$ 830.00M	\$ 825.00M
Canadian Exports \$	20.00M	\$ 20.00M	\$ 18.00M	\$ 18.00M
Canadian Share of Import Market	3.00%	2.00%	2.00%	2.00%

## Major Competing Countries

## Market Share

- |                                 |       |
|---------------------------------|-------|
| i) 577 UNITED STATES OF AMERICA | 000 % |
| ii) 265 JAPAN                   | 000 % |

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 60-100 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

- |                                       |                |           |
|---------------------------------------|----------------|-----------|
| i) COMMERCIAL CONSTRUCTION PRODUCTS   | In Canadian \$ | \$ 0.00 M |
| ii) RESIDENTIAL CONSTRUCTION PRODUCTS | \$             | 0.00 M    |

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- the apparent limited sectoral capability in Canada compared to other competing export countries
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- other factor(s) described by the Trade Office as follows:  
BUY AMERICA LEGISLATION CAN BE AN IMPEDIMENT BUT USUALLY CAN BE OVERCOME BY PERSISTENT EXPORTERS.

## Export and Investment Promotion Planning System

MISSION: 618 MINNEAPOLIS

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: WITH COLLABORATION OF LOCAL ARCHITECTS/CONSTRUCTION INDUSTRY ASSOCIATIONS, DEVELOP A GUIDEBOOK FOR MARKETING OF PRODUCTS TO ARCHITECTS, SPECIFIERS AND CONTRACTORS.

Results Expected: ENHANCED COMPETITIVENESS OF CDN. CONSTRUCTION PRODUCTS MANUFACTURERS.

Activity: WITH THE ASSISTANCE OF DRIE/PROVINCIAL OFFICERS, ORGANIZE A MARKETING SEMINAR/NEBS MISSION FOR WESTERN CANADIAN CONSTRUCTION MANUFACTURERS.

Results Expected: IMPROVED EXPORT READINESS OF SMALL MANUFACTURERS.

Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 618 MINNEAPOLIS

Country: 577 UNITED STATES OF AMERICA

## Highlights of Investment Environment

Estimated Value Of Equity Investment  
In Canada From This Post Territory:

\$ 10 700.00 M

Estimated Value Of Annual Direct Equity  
Investments To All Destinations From  
This Post Territory:

\$ 2 100.00 M

Country Destinations Of Direct  
Equity Investment From Post  
TerritoryEstm. Value  
\$ CDN% Of Annual Direct Equity  
Investment Outflows By  
Category Of Investors

1. 075 CANADA	\$ 2 100.00 M	1. Corporations : 80.00 %
2. 051 UNITED KINGDOM	\$ 1 600.00 M	2. Institutional : 5.00 %
3. 128 GERMANY WEST	\$ 770.00 M	3. Entrepreneurs : 10.00 %
4. 512 SWITZERLAND	\$ 417.00 M	4. Immigrant Entr.: 5.00 %

The Mission Has Reported Factors That Tend To Change  
Outward Flows Of Investment From The Post Territory Including:

- Corporate Search For Cheaper Production And/Or Operating Costs  
Outside The Country
- Corporate Expansion To Seek New Markets
- Corporate Expansion To Serve Better Existing Markets

The Mission Reports That Investors From The Post Territory Who Invest Abroad  
In Manufacturing Tend To Invest In The Following Sector(s) Subsector(s)

## -SECTOR(S)-

1. 001 AGRI & FOOD PRODUCTS & SERVICE
2. 006 ELECTRONICS EQUIP. & SERV
3. 005 COMM. & INFORM. EGP. & SERV
4. 004 DEFENCE PROGRAMS, PRODUCTS, SERV

## -SUBSECTOR(S)-

- 015 SEMI & PROCESSED FOOD & DRINK
- 061 PRODUCTS & COMPONENTS
- 054 COMPUTERS, SOFTWARE & SYSTEMS
- 043 ELECTRICAL & ELECTRONIC

Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 618 MINNEAPOLIS

Country: 577 UNITED STATES OF AMERICA

Equity Propensity Of Key Sources Of Investment From This Territory

Corporations : Start-up Investment To Create New Enterprise (On A Joint Basis)  
 Institutional :  
 Entrepreneurs : Partial Ownership Of Existing Corporate Facilities With Direct  
 Involvement In Day-to-Day Operations  
 Immigrant Entr.: Start-up Investment To Create New Enterprise (100% Ownership)

Sector Preferences By Type Of Key Investors

Corporations : Portfolio Investment  
 Institutional : Portfolio Investment  
 Entrepreneurs : Portfolio Investment  
 Immigrant Entr.: Agriculture

Investment Promotion Priority Sectors Sub-Sectors  
Program Plans And Actipicipated Results.

Sector : 005 COMM. & INFORM. EQP. & SERV  
 Subsector: 142 HOSP. & MEDICAL EQUIP, INSTRUM.

Reason(s):

MINNESOTA HAS 300 FIRMS IN THE BIOTECH INDUSTRY RANGEING FROM 3M TO SMALL START-UP COMPANIES. POST WILL FOLLOW-UP ON ACTIVITIES CONDUCTED DURING FY 1987/88.

Program Plans:

FOLLOW-UP ON LEADS RESULTING FROM INDUSTRY VISITS, DIRECT MAIL CAMPAIGN AND MEDICAL ALLEY MEETING & RECEPTION HELD NOV. 12, 1987 AT CONSULATE.

Anticipated Results: 5-10 SERIOUS INVESTMENT OR TECHNOLOGY TRANSFER INQUIRIES.

Sector : 014 EDUCATION, MEDICAL, HEALTH PROD  
 Subsector: 141 PHARMACEUTICALS, BIOTECHNOLOGY

Reason(s):

MINNESOTA HAS AN ACTIVE SECTOR IN MEDICAL DEVICES WHICH HAS SHOWN INTEREST IN EXPANSION TO CANADA.

DATE: 88/01/25

DEPARTMENT OF EXTERNAL AFFAIRS

PAGE: 338

Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 618 MINNEAPOLIS

Country: 577 UNITED STATES OF AMERICA

Investment Promotion Priority Sectors Sub-Sectors  
Program Plans And Anticipated Results.

Sector : 014 EDUCATION, MEDICAL, HEALTH PROD  
Subsector: 141 PHARMACEUTICALS, BIOTECHNOLOGY

Program Plans:

FOLLOW-UP ON LEADS RESULTING FROM INDUSTRY VISITS, DIRECT MAIL CAM-  
PAIGN AND MEDICAL ALLEY MEETING & RECEPTION HELD NOV. 12, 1987 AT  
CONSULATE.

Anticipated Results: 5-10 SERIOUS INVESTMENT OR TECHNOLOGY  
TRANSFER INQUIRIES.

Sector : 005 COMM. & INFORM. EQP. & SERV  
Subsector: 054 COMPUTERS, SOFTWARE & SYSTEMS

Reason(s):

A SIGNIFICANT NUMBER OF ESTABLISHED AND/OR GROWING COMPUTER AND ELEC-  
TRONIC EQUIPMENT MANUFACTURERS ARE LOCATED IN THE MINNEAPOLIS/ST. PAUL  
AREA.

Program Plans:

ONE ON ONE INTERVIEWS WITH POTENTIAL INVESTORS. FOLLOW-UP ON LEADS  
DEVELOPED THROUGH CURRENT DRIE U.S. ELECTRONICS MEDIA CAMPAIGN AND  
WITH HIGH TECH SEMINAR SCHEDULED FOR MARCH '89.

Anticipated Results: 5 SERIOUS INVESTMENT INQUIRIES.

Sector : 001 AGRI & FOOD PRODUCTS & SERVICE  
Subsector: 015 SEMI & PROCESSED FOOD & DRINK

Reason(s):

MINNEAPOLIS IS THE HEADQUARTERS CITY FOR SOME OF THE MAJOR FOOD PRO-  
CESSORS IN THE UNITED STATES. POTENTIAL EXISTS TO EXPAND THEIR INVEST-  
MENTS IN CANADA.

Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 618 MINNEAPOLIS

Country: 577 UNITED STATES OF AMERICA

Investment Promotion Priority Sectors Sub-Sectors  
Program Plans And Anticipated Results.

Sector : 001 AGRI & FOOD PRODUCTS & SERVICE  
Subsector: 015 SEMI & PROCESSED FOOD & DRINK

Program Plans:

PURCHASE OF AGRI-BUSINESS MARKETING LIST FOLLOWED BY: 1. DIRECT MAIL  
CAMPAIGN AND 2. CALLS ON COMPANIES RESPONDING POSITIVELY TO CAMPAIGN.

Anticipated Results: 10-15 SERIOUS INVESTMENT INQUIRIES.

Sector : 001 AGRI & FOOD PRODUCTS & SERVICE  
Subsector: 018 FEED, FERTILIZER & VET PRODUCTS

Reason(s):

POST COMPANIES HAVE SUBSTANTIAL INVESTMENTS IN CANADA. MINNEAPOLIS AND  
OMAHA ARE AGRI-BUSINESS CENTERS FOR THE UNITED STATES.

Program Plans:

PURCHASE OF AGRI-BUSINESS MARKETING LIST FOLLOWED BY: 1. DIRECT MAIL  
CAMPAIGN AND 2. CALLS ON COMPANIES RESPONDING POSITIVELY TO CAMPAIGN.

Anticipated Results: 10-15 SERIOUS INVESTMENT INQUIRIES.

Other Investment Program Plans

Activity(ies):

FOLLOW-UP ON LEGAL/FINANCIAL/BANKING CONTRACTS ESTABLISHED AT INVEST-  
MENT SEMINAR SCHEDULED SPECIFICALLY FOR THESE PROFESSIONS IN MARCH  
1988.

Anticipated Results: IMPROVE KNOWLEDGE BASE OF PROFESSIONALS  
ADVISING COMPANIES ON INVESTMENT DECISIONS

DATE: 88/01/25

DEPARTMENT OF EXTERNAL AFFAIRS

PAGE: 340

Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 618 MINNEAPOLIS

Country: 577 UNITED STATES OF AMERICA

Investment Promotion Activities Proposals

Type Of Event: 040 DIRECT MAIL CAMPAIGN

Description: AGRI-BUSINESS DEVELOPMENT

Priority: 2 Date: 05/88

Sector: 999 MULTIPLE SECTORS

Sub-Sector: 999 ALL SUB-SECTORS

Location: ALL STATES

Type Of Event: 050 SEMINARS

Description: HIGH TECH INVESTMENT PROMOTION

Priority: 1 Date: 03/89

Sector: 999 MULTIPLE SECTORS

Sub-Sector: 999 ALL SUB-SECTORS

Location: MPLS/ST. PAUL

Description: INVESTMENT BREAKFAST SEMINAR

Priority: 3 Date: 06/88

Sector: 999 MULTIPLE SECTORS

Sub-Sector: 999 ALL SUB-SECTORS

Location: OMAHA

## Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 618 MINNEAPOLIS		
Sector: 006 ELECTRONICS EQUIP. & SERV		
010 FAIRS		
MIDWEST ELECTRONICS EXPO.	ST. PAUL	0589
MIDWEST ELECTRONICS EXPO	ST. PAUL	0590
UPPER MIDWEST ELECTRICAL SHOW	ST. PAUL	0490
Sector: 008 TRANSPORT SYS, EQUIP, COMP, SERV.		
024 MISSION INCOMING		
TORONTO BOAT SHOW	TORONTO	0190
TORONTO BOAT SHOW	TORONTO	0191
Sector: 009 FOREST PRODUCTS, EQUIP, SERVICES		
010 FAIRS		
NORTHWESTERN LUMBERMANS SHOW	MINNEAPOLIS	0190
NORTHWESTERN LUMBERMENS SHOW	MINNEAPOLIS	0191
Sector: 013 CONSUMER PRODUCTS		
010 FAIRS		
MN ARCHITECTS & INTERIOR DESIGNERS	MINNEAPOLIS	1190
MINNEAPOLIS GIFT & SOUVENIOR SHOW	MINNEAPOLIS	0390
MN ARCHITECTS & INTERIOR DESIGNERS SHOW	MINNEAPOLIS	1189
MINNEAPOLIS GIFT & SOUVENIOR SHOW	MINNEAPOLIS	0391
020 MISSION OUTGOING		
APPAREL REP. LOCATOR	MINNEAPOLIS	0191
APPAREL REP. LOCATOR	MINNEAPOLIS	0190
APPAREL NEBS MISSION	MINNEAPOLIS	0890
APPAREL NEBS MISSION	MINNEAPOLIS	0889
024 MISSION INCOMING		
FESTIVAL OF CANADIAN FASHION	TORONTO	0390
CANADIAN SPORTING GOODS ASSOC. SHOW	MONTREAL	0290
IIDEX FURNITURE SHOW	TORONTO	1189
IIDEX FURNITURE SHOW	TORONTO	1190
CANADIAN SPORTING GOODS ASSOC. SHOW	MONTREAL	0291
FESTIVAL OF CANADIAN FASHION	TORONTO	0391
Sector: 014 EDUCATION, MEDICAL, HEALTH PROD		
010 FAIRS		
CARE PROVIDERS SHOW	MINNEAPOLIS	1189
CARE PROVIDERS SHOW	MINNEAPOLIS	1190



## Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 618 MINNEAPOLIS		
Sector: 015 CONSTRUCTION INDUSTRY		
010 FAIRS		
HARDWARE/BUILDING PRODUCTS SOLO SHOW	MINNEAPOLIS	1190
Sector: 016 INDUSTRIAL MACHIN, PLANTS, SERV.		
010 FAIRS		
TWIN CITIES PRODUCT SHOW	MINNEAPOLIS	0489
MIDWEST ENGINEERS CONFERENCE	MINNEAPOLIS	0190
OMAHA PRODUCT SHOW	OMAHA	0989
MIDWEST ENGINEER CONFS.	MINNEAPOLIS	0191
IOWA PRODUCT SHOW	DES MOINES	1090
OMAHA PRODUCT SHOW	OMAHA	0990
TWIN CITIES PRODUCT SHOW	MINNEAPOLIS	0490

## Export and Investment Promotion Planning System

88/89 Trade and Economic Overview

Mission: 613 BUFFALO

Country: 577 UNITED STATES OF AMERICA

WITH A POPULATION OF 4 MILLION BORDERING ON ONTARIO AND QUEBEC, UPSTATE NEW YORK IS A NATURAL START UP MARKET FOR CANADIAN EXPORTERS. OUR "NEW EXPORTERS TO BORDER STATES" -NEBS PROGRAM HAS SERVED TO TRAIN AROUND 1000 FIRMS IN THE PAST 3 YEARS AND HAS BEEN ACCLAIMED AS ONE OF THE MOST SUCCESSFUL EXPORT TRAINING GOVERNMENTAL PROGRAMS EVER ESTABLISHED.

UPSTATE NEW YORK'S ECONOMY HAS SHIFTED FROM A BLUE COLLAR TYPE AREA TO A SERVICE AREA OVER THE PAST DECADE. UNIVERSITIES, BANKS, LAW FIRMS, RETAIL TRADE AND CONSULTING SERVICES ARE THE MAINSTAY OF THE LOCAL ECONOMY. UNEMPLOYMENT IS AROUND THE 6% MARK, A POINT LOWER THAN LAST YEAR. PRICES ARE GENERALLY LOWER IN THIS AREA COMPARED TO THE REST OF THE U.S. AND THE COST OF DOING BUSINESS IS CORRESPONDINGLY LOWER. THE FORECAST IS A MODEST 1-2% GROWTH OVER A YEAR.

CANADIAN SALES OPPORTUNITIES EXIST IN ALL TYPES OF CONSUMER PRODUCTS, INFORMATICS, ENERGY, NATURAL RESOURCES AND INDUSTRIAL COMPONENTS. THE MAJOR INDUSTRIAL FIRMS ARE KODAK, XEROX, IBM, FISHER PRICE TOYS, DEFENCE RELATED FIRMS SUCH AS GENERAL ELECTRIC, SIERRA RESEARCH, BELL AEROSPACE, AND MOOG. BUFFALO ALSO HAS THE LARGEST COMPUTER SERVICE FIRM IN THE U.S. (COMPUTER TASK GROUP) AND THE LARGEST SOFTWARE DISTRIBUTOR (INGRAM SOFTWARE). SOME 500 CANADIAN FIRMS USE BUFFALO AS THEIR DISTRIBUTION CENTER FOR THE U.S. MARKET.

## Export and Investment Promotion Planning System

REPT: SYN-GEO 88/89 A. Post export program priorities

Region: UNITED STATES

Mission: 613 BUFFALO

Market: 577 UNITED STATES OF AMERICA

The Mission selected the following sectors as priority areas for export promotion activities for the coming fiscal year:

## 1. 011 OIL &amp; GAS EQUIPMENT, SERVICES

REASONS: OUR AREA'S 5 GROCERY CHAINS ALL CARRY CANADIAN MERCHANDISE AND GIVEN RIGHT INCENTIVES/PROMOTION, THEY COULD TAKE A LOT MORE. THEIR SALES ARE IN THE ORDER OF \$10 BILLION/YEAR.

## 2. 005 COMM. &amp; INFORM. EQP. &amp; SERV

REASONS: AFTER COMPLETING OUR SECOND PARTICIPATION WITH 10 CANADIAN FIRMS AT ROCHESTER COMPUTER SHOW, WE CAN AFFIRM THAT MARKET IS EXCELLENT FOR BOTH HARDWARE/SOFTWARE COMPUTER RELATED PRODUCTS.

## 3. 013 CONSUMER PRODUCTS

REASONS: WE WERE VERY SUCCESSFUL IN OUR SPONSORSHIP TO MONTREAL/TORONTO OF A HIGH END LADIES APPAREL DEPARTMENT STORE THIS YEAR. FOR THIS REASON, WE WOULD LIKE TO ENCOURAGE ANOTHER SUCH CHAIN TO START SOURCING IN CDA.

The most important current Canadian export sectors to this market are (based on actual export sales):

1. 008 TRANSPORT SYS, EQUIP, COMP, SERV.
2. 010 MINE, METAL, MINERAL PROD & SRV
3. 009 FOREST PRODUCTS, EQUIP, SERVICES
4. 007 POWER & ENERGY EQUIP. & SERV.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 613 BUFFALO

Market: 577 UNITED STATES OF AMERICA

Sector: 001 AGRI &amp; FOOD PRODUCTS &amp; SERVICE

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	10800.00M	\$10500.00M	\$10200.00M	\$10000.00M
Canadian Exports \$	650.00M	\$ 630.00M	\$ 572.00M	\$ 484.00M
Canadian Share of Import Market	6.00%	6.00%	5.60%	4.80%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	080 %
ii) 112 FRANCE	003 %
iii) 051 UNITED KINGDOM	002 %
iv) 128 GERMANY WEST	001 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are  
good market prospects

## Current Total Imports

	In Canadian \$
i) MEAT	\$ 142.00 M
ii) FISH	\$ 68.00 M
iii) BEER	\$ 49.00 M
iv) SUGAR	\$ 48.00 M
v) VEGETABLE PREPS	\$ 26.00 M

The Trade Office reports that the following factors influence Canadian  
export performance in this market for this sector (sub-sector).

- there are import restrictions which can present significant problems

In the Trade Office's opinion, Canadian export performance in this sector  
(sub-sector) in this market is lower than optimum mainly because of:

- No factors reported by mission

## Export and Investment Promotion Planning System

MISSION: 613 BUFFALO

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade fairs
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: OUR SOLO FOOD SHOW WHICH ATTRACTS BETWEEN 50-70 FIRMS ANNUALLY WILL CONTINUE TO BE MAIN ACTIVITY IN SECTOR.

Results Expected: HALF OF EXHIBITORS ARE NEW TO MARKET EACH YEAR AND 12 MONTH SALES PROJECTIONS EXCEED \$1 MILLION EACH YEAR.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 613 BUFFALO

Market: 577 UNITED STATES OF AMERICA

Sector: 005 COMM. &amp; INFORM. EQP. &amp; SERV

Subsector: 054 COMPUTERS, SOFTWARE &amp; SYSTEMS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	445.00M	\$ 430.00M	\$ 415.00M	\$ 400.00M
Canadian Exports \$	16.00M	\$ 14.00M	\$ 12.00M	\$ 10.00M
Canadian Share of Import Market	3.60%	3.20%	2.80%	2.50%

## Major Competing Countries

Market Share

i) 265 JAPAN	005 %
ii) 268 KOREA	004 %
iii) 128 GERMANY WEST	002 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 5-15 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

In Canadian \$

i) COMPUTER SOFTWARE	\$ 5.00 M
ii) COMPUTER PERIPHERALS	\$ 5.00 M
iii) COMPUTER SERVICES	\$ 2.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

## Export and Investment Promotion Planning System

MISSION: 613 BUFFALO

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: COMPILE/UPDATE LIST OF UPSTATE NEW YORK AGENTS, DISTRIBUTORS FOR:  
COMPUTER SOFTWARE/SERVICES.

Results Expected: LIST WILL HELP CANADIAN PARTICIPANTS AT  
ROCHESTER COMPUTER SHOW TO DO PRE-SHOW MAIL-  
LING AND SHOW FOLLOW-UP.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 613 BUFFALO

Market: 577 UNITED STATES OF AMERICA

Sector: 013 CONSUMER PRODUCTS

Subsector: 131 APPAREL (CLOTH, FUR, SHOES) TEXT

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	7800.00M	\$ 7400.00M	\$ 7000.00M	\$ 6500.00M
Canadian Exports \$	200.00M	\$ 149.00M	\$ 117.00M	\$ 85.00M
Canadian Share of Import Market	2.60%	2.00%	1.70%	1.30%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	045 %
ii) 189 HONG KONG	015 %
iii) 265 JAPAN	015 %
iv) 434 TAIWAN	012 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 30-60 \$M

Current status of Canadian exports: Well established and growing

Products/services for which there are  
good market prospects

	Current Total Imports In Canadian \$
i) LADIES DRESSES	\$ 80.00 M
ii) LADIES OUTERWEAR (COATS)	\$ 60.00 M
iii) SWEATERS	\$ 25.00 M

The Trade Office reports that the following factors influence Canadian  
export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be high

In the Trade Office's opinion, Canadian export performance in this sector  
(sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- high tariffs



## Export and Investment Promotion Planning System

MISSION: 613 BUFFALO

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: THROUGH ANNUAL SPONSORSHIP OF STORE BUYERS TO TORONTO & MONTREAL (INCLUDING TORONTO FASHION FESTIVAL), WE HOPE TO INCREASE OUR MARKET PENETRATION.

Results Expected: HOPE TO CONVINC ONE DEPARTMENT STORE CHAIN/ YEAR TO START SOURCING IN CANADA.

Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 613 BUFFALO

Country: 577 UNITED STATES OF AMERICA

## Highlights of Investment Environment

Estimated Value Of Equity Investment  
In Canada From This Post Territory:

\$ 0.00 M

Estimated Value Of Annual Direct Equity  
Investments To All Destinations From  
This Post Territory:

\$ 2 000.00 M

Country Destinations Of Direct  
Equity Investment From Post  
TerritoryEstm. Value  
\$ CDN% Of Annual Direct Equity  
Investment Outflows By  
Category Of Investors

1. 075 CANADA	\$ 70 000.00 M	1. Corporations : 50.00 %
2. 051 UNITED KINGDOM	\$ 46 000.00 M	2. Institutional : 10.00 %
3. 128 GERMANY WEST	\$ 24 000.00 M	3. Entrepreneurs : 30.00 %
4. 512 SWITZERLAND	\$ 22 000.00 M	4. Immigrant Entr.: 10.00 %

The Mission Has Reported Factors That Tend To Change  
Outward Flows Of Investment From The Post Territory Including:

- Corporate Search For Cheaper Production And/Or Operating Costs  
Outside The Country
- Corporate Expansion To Serve Better Existing Markets

## Equity Propensity Of Key Sources Of Investment From This Territory

Corporations : Start-up Investment To Create New Enterprise (100% Ownership)  
 Institutional : Start-up Investment To Create New Enterprise (100% Ownership)  
 Entrepreneurs : Start-up Investment To Create New Enterprise (100% Ownership)  
 Immigrant Entr.: Start-up Investment To Create New Enterprise (100% Ownership)

## Sector Preferences By Type Of Key Investors

Corporations : Manufacturing Industries  
 Institutional : Portfolio Investment  
 Entrepreneurs : Manufacturing Industries  
 Immigrant Entr.: Real-Estate

DATE: 88/01/25

DEPARTMENT OF EXTERNAL AFFAIRS

PAGE: 342j

Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 613 BUFFALO

Country: 577 UNITED STATES OF AMERICA

**Investment Promotion Priority Sectors Sub-Sectors  
Program Plans And Anticipated Results.**

Sector : 014 EDUCATION, MEDICAL, HEALTH PROD  
Subsector: 141 PHARMACEUTICALS, BIOTECHNOLOGY

**Reason(s):**

EASTMAN KODAK HAS CREATED IMPORTANT LIFE SCIENCES DIVISION AND ARE  
LOOKING FOR ACQUISITIONS OF BIOTECHNOLOGY FIRMS.

**Program Plans:**

WE ARE ALREADY HOLDING DISCUSSIONS WITH KODAK AND WOULD LIKE TO  
SPONSOR THEM AT CANBIOCON 88 IN MONTREAL.

**Anticipated Results:** POTENTIAL FOR ACQUISITION OF CANADIAN  
BIOTECH FIRM OR ESTABLISHMENT OF AN RND  
FACILITY.

## Export and Investment Promotion Planning System

## 88/89 Trade and Economic Overview

Mission: 619 ATLANTA

Country: 577 UNITED STATES OF AMERICA

THE MISSION SERVES THE SOUTHEASTERN US FROM ITS GEOGRAPHIC CENTER - ATLANTA. THE TERRITORY INCLUDES THE STATES OF TENNESSEE, NORTH CAROLINA SOUTH CAROLINA ALABAMA MISSISSIPPI GEORGIA FLORIDA PUERTO RICO & THE US VIRGIN ISLANDS - A POPULATION OF APPROXIMATELY 40M (THE LARGEST POST TERRITORY IN THE US). AS THE EASTERN EXTENSION OF THE US "SUNBELT" THE TERRITORY HAS ENJOYED UNPARALLELED ECONOMIC EXPANSION. GIVEN THE RECENT PERFORMANCE OF THE US ECONOMY AND THE VARIOUS MIX OF STRENGTHS & WEAKNESSES IN 86 THE OUTLOOK FOR THE SOUTHEASTERN US IS RELATIVELY ENCOURAGING AND WILL CONTINUE TO OUT-PERFORM OTHER REGIONS OF THE US BUT NOT UNIFORMLY ACROSS INDUSTRY OR STATES. STIMULATED BY INCREASING POPULATION & RAPID GROWTH IN PERSONAL INCOME THERE WILL BE GENERAL ECONOMIC EXPANSION. HOWEVER THE NATURE OF THE REGIONAL ECONOMY IS CHANGING - LESS CONSTRUCTION MORE MANUFACTURING. MANUFACTURING IS GAUGED BY EMPLOYMENT ACCOUNTS FOR AROUND 22% OF THE REGION'S JOB AS COMPARED WITH 19% FOR THE US AS A WHOLE. EXPENDITURES FOR DEFENCE PRODUCTS AS WELL AS THE PRODUCTION OF OTHER MANUFACTURED GOODS WILL BE WIDESPREAD ACROSS THE REGION. IN 86 CDN EXPORTS TO THE REGION WAS 5.5 BIL. DLRS. THE ECONOMIC FRAMEWORK OF THE TERRITORY AFFORDS A CHALLENGING & ENTICING SCENARIO FOR CDN EXPORTERS. LOW EMPLOYMENT LEVELS A VERY DYNAMIC "SUNBELT" DEVELOPMENT SYNDROME WITH PARTICULAR EMPHASIS ON THE HIGH-TECH ARENA ALONG WITH AN ENHANCED LEVEL OF CONSUMPTION & A VERY SIGNIFICANT LATIN AMER. / CARIBBEAN COMPONENT ENABLES VIRTUALLY ALL SECTORS OF CDN INDUSTRY SUBSTANTIAL OPPORTUNITIES. A PARTICULAR EMPHASIS ON HIGH-TECH GOODS & SERVICES CONSTRUCTION MATERIALS CONTRACT FURNITURE FOOD & FISH PRODUCTS AND A WIDE RANGE OF INDUSTRIAL PRODUCTS ALL PRESENT A BUOYANT MARKET FOR CDN PRODUCTS. NOT BE UNDERESTIMATED IS THE ECONOMIC PERFORMANCE OF PUERTO RICO US WHICH OFFERS MARKET OPPORTUNITIES FOR A WIDE RANGE OF CDN GOODS. PUERTO RICO IS CDA'S SECOND LARGEST (AFTER CUBA) MARKET IN THE ENTIRE CARIBBEAN/ CENTRAL AMERICA REGION. IN FACT PUERTO RICO'S US \$10 BIL. IMPORT MARKET IS ONLY EXCEEDED BY IMPORTS FROM BRAZIL & MEXICO WHEN YOU CONSIDER ALL LATIN AMERICAN & CARIBBEAN COUNTRIES. EXPORT FINANCING IS NOT A REQUIREMENT IN BUSINESS DONE AS IN THE US.

## Export and Investment Promotion Planning System

REPT: SYN-GEO 88/89 A. Post export program priorities

Region: UNITED STATES

Mission: 619 ATLANTA

Market: 577 UNITED STATES OF AMERICA

The Mission selected the following sectors as priority areas for export promotion activities for the coming fiscal year:

1. 004 DEFENCE PROGRAMS, PRODUCTS, SERV  
REASONS: THE SOUTHEASTERN US IS A MAJOR PROCUREMENT CENTER FOR THE DEFENCE INDUSTRY. BIL. OF \$ OF GOODS & SERVICES ARE PROCURED ANN. BY VARIOUS MILITARY COMMANDS & PRIME CONTRACTORS LOCATED IN REGION. FLORIDA IS
2. 005 COMM. & INFORM. EQP. & SERV  
REASONS: A LARGE & EXPANDING HIGH-TECH INDUSTRY WHICH REQUIRES COMPONENTS SYSTEMS & SOFTWARE. NAT'L & REG'L TRADE SHOWS CONTINUE TO OFFER CDN FIRMS OPPORTUNITIES TO OBTAIN LEADS ESTABLISH AGENTS & DISTRIBUTORS. SECTOR
3. 002 FISHERIES, SEA PRODUCTS & SERV.  
REASONS: POPULATION GROWTH-A HEALTHY ECONOMIC CLIMATE-ENDORMOUS TOURISM & HOSPITALITY RESTAURANT & FAST-FOOD INDUSTRIES ALL OFFER CDN AG FISH & FOOD INDUSTRIES A MARKET THEY CANNOT OVERLOOK. IMPORTANT TRADE SHOWS
4. 013 CONSUMER PRODUCTS  
REASONS: MASSIVE POP. GROWTH IN THE POST TERRITORY COUPLED WITH INCREASING AVERAGE WAGE LEVELS CREATES AN EVER-EXPANDING DEMAND FOR ALL TYPES OF CONSUMER PRODUCTS. THE MASSIVE TOURIST IND. PROVIDES GREAT MKT FOR
5. 015 CONSTRUCTION INDUSTRY  
REASONS: CONSTRUCTION OF ALL TYPES CONTINUES UNABATED IN THE SOUTHEAST & ENJOYS GROWTH RATES WELL ABOVE NATIONAL AVERAGE. ALL TYPES OF BUILDING MATERIALS CAN BE MKT'D. SERIES OF REG'L TR. SHOWS-GOOD PRODUCT EXPOS.
6. 016 INDUSTRIAL MACHIN. PLANTS, SERV.  
REASONS: AS THE "INDUSTRIALIZATION" OF THE "SOUTH" CONTINUES THERE ARE EXTENSIVE OPPORTUNITIES FOR ALL TYPES OF INDUSTRIAL MACHINERY & COMPONENTS INCLUDING MATERIAL HANDLING PACKAGING FOREST HARVESTING PULP & PAPER

The most important current Canadian export sectors to this market are (based on actual export sales):

1. 008 TRANSPORT SYS, EQUIP, COMP, SERV.
2. 009 FOREST PRODUCTS, EQUIP, SERVICES
3. 005 COMM. & INFORM. EQP. & SERV
4. 010 MINE, METAL, MINERAL PROD & SRV

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 619 ATLANTA

Market: 577 UNITED STATES OF AMERICA

Sector: 001 AGRI &amp; FOOD PRODUCTS &amp; SERVICE

Subsector: 015 SEMI &amp; PROCESSED FOOD &amp; DRINK

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	3500.00M	\$ 3300.00M	\$ 3100.00M	\$ 2794.90M
Canadian Exports \$	155.00M	\$ 140.00M	\$ 120.00M	\$ 99.20M
Canadian Share of Import Market	4.50%	4.20%	4.00%	3.50%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	060 %
ii) 610 LATIN AMERICA	015 %
iii) 609 EUROPEAN COMMON MARKET C	015 %
iv) 605 ASIA OR FAR EAST	010 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 5-15 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are  
good market prospects

Current Total Imports  
In Canadian \$  
\$ 2000.00 M

i) ALL PROCESSED FOODS

The Trade Office reports that the following factors influence Canadian  
export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector  
(sub-sector) in this market is lower than optimum mainly because of:

- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by  
some Canadian companies

Some Canadian exporters to this market in this sector(sub-sector)  
have enjoyed success previously as a result of a variety of  
factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market

## Export and Investment Promotion Planning System

MISSION: 619 ATLANTA

COUNTRY: 577 UNITED STATES OF AMERICA

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: IN-STORE PROMOTION IN PUBLIX SUPER MARKETS, LAKELAND, FL., JANUARY, 1988 IN OVER 140 STORES.

Results Expected: \$1.2 MILLION (CDN) OVER 12 MONTHS.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: INCLUDE MORE PERTINENT INFORMATION REGARDING AGENTS, DISTRIBUTORS, MARKETS AND ACTIVITIES OF CANADIAN COMPANIES IN POST COMPUTER BANK.

Results Expected: HAVE IMMEDIATE INFORMATION AVAILABLE FOR PLANNING AND MARKETING PURPOSES.

Activity: HAVE ONE-ON-ONE INTERVIEWS WITH DISTRIBUTORS AND BROKERS TO ESTABLISH CORDIAL RELATIONS, PUSH CANADIAN PRODUCTS.

Results Expected: PERSONALLY MEET TOP TWENTY BROKERS/DISTRIBUTORS IN TERRITORY. HAVE KNOWLEDGE OF MARKETS, BUYING PATTERNS.

Activity: ORGANIZED AND IMPLEMENT TWO PROMOTIONAL EVENTS IN ORDER TO INTRODUCED NEW CANADIAN COMPANIES TO THE SOUTHEASTERN MARKETPLACE.

Results Expected: HAVE FIVE NEW COMPANIES ACTIVELY SELLING IN THE MARKET AND ACHIEVE \$150,000 IN SALES.

## Export and Investment Promotion Planning System

## 88/89 Sector/Sub-Sector Highlights

Submitted by Posts by Region

Region: UNITED STATES

Mission: 619 ATLANTA

Market: 577 UNITED STATES OF AMERICA

Sector: 001 AGRI &amp; FOOD PRODUCTS &amp; SERVICE

Subsector: 016 AGRICULTURE MACH. EQUIP. TOOLS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	284.00M	\$ 259.50M	\$ 247.50M	\$ 233.00M
Canadian Exports \$	40.00M	\$ 37.40M	\$ 84.20M	\$ 30.90M
Canadian Share of Import Market	14.00%	14.40%	34.00%	13.20%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	055 %
ii) 265 JAPAN	018 %
iii) 268 KOREA	007 %
iv) 620 EUROPE	004 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector:

Current status of Canadian exports:

Products/services for which there are good market prospects

	Current Total Imports In Canadian \$
i) DRYING SHEDS	\$ 10.00 M
ii) TOBACCO HARVESTER	\$ 20.00 M
iii) FIELD SPRAYERS	\$ 20.00 M
iv) PULLED FERTILIZERS	\$ 20.00 M
v) AERATORS	\$ 20.00 M
vi) FARM WAGONS	\$ 10.00 M
vii) RAKES	\$ 10.00 M
viii) ROCK PICKERS	\$ 10.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).



## Export and Investment Promotion Planning System

MISSION: 619 ATLANTA

COUNTRY: 577 UNITED STATES OF AMERICA

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: IDENTIFICATION OF DEALERS, AGENTS AND DISTRIBUTORS WITH SPECIFIC INTERESTS AND MARKETS. INPUT OF SAME INTO POST COMPUTERS.

Results Expected: HAVE UP TO DATE LISTS AND MARKET DATA FOR REFERRAL TO CANADIAN COMPANIES.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: INVESTIGATE SPECIFIC DATA REGARDING SIZE, CONFIGURATION PREFERENCES IN MARKET FOR AGRICULTURAL MACHINERY RELATED ITEMS.

Results Expected: REPORT SPECIFIC MARKETS, CHANGES, ETC. TO CANADIAN COMPANIES.

Activity: ORGANIZE AND IMPLEMENT TWO PROMOTIONAL EVENYS IN ORDER TO INTRODUCE NEW CANADIAN COMPANIES TO THE SOUTHEASTERN MARKETPLACE.

Results Expected: HAVE FIVE NEW COMPANIES ACTIVELY SELLING IN MARKET AND ACHIEVE \$150,000 SALES.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 619 ATLANTA

Market: 577 UNITED STATES OF AMERICA

Sector: 002 FISHERIES, SEA PRODUCTS &amp; SERV.

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	820.00M	\$ 815.00M	\$ 806.00M	\$ 796.10M
Canadian Exports \$	50.00M	\$ 40.00M	\$ 28.00M	\$ 18.70M
Canadian Share of Import Market	6.00%	4.90%	3.40%	2.30%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	060 %
ii) 610 LATIN AMERICA	012 %
iii) 612 SCANDINAVIA	008 %
iv) 609 EUROPEAN COMMON MARKET C	008 %
v) 268 KOREA	006 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 15-30 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

In Canadian \$

i) FRESH FISH	\$ 170.00 M
ii) SHELLFISH	\$ 90.00 M
iii) SURIMI	\$ 5.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- the apparent limited sectoral capability in Canada compared to other competing export countries
- difficulties of adaptation of marketing techniques to the market by some Canadian companies

## Export and Investment Promotion Planning System

MISSION: 619 ATLANTA

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: IDENTIFICATION AND CONTACT WITH ADDITIONAL BROKERS/DISTRIBUTORS IN TERRITORY.

Results Expected: IDENTIFY REQUIREMENTS, ESTABLISH WORKING RELATIONSHIP WITH INFLUENTIAL PLAYERS.

Activity: INPUT OF INDEPTH INFORMATION ON LOCAL CONTACTS INTO COMPUTERS.

Results Expected: HAVE USEFUL INFORMATION ON CONTACTS, MARKETS, TRADE SHOWS, ETC.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ORGANIZE AND IMPLEMENT TWO PROMOTIONAL EVENTS TO INTRODUCE NEW CANADIAN COMPANIES TO MARKET AND ACHIEVE EXPORT SALES.

Results Expected: HAVE FIVE TO TEN NEW CANADIAN COMPANIES SELLING TO MARKET RESULTING IN \$2590,000 SALES.

Activity: DIRECT MAILING TO KNOWN DISTRIBUTORS AND BROKERS TO INFORM THEM OF CANADIAN CAPABILITIES IN THE SECTOR.

Results Expected: ESTABLISH INTEREST IN CANADIAN COMPANIES WITH VALUE ADDED PRODUCTS IN SOUTHEASTERN MARKET-PLACE.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 619 ATLANTA

Market: 577 UNITED STATES OF AMERICA

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import)	\$ 12000.00M	\$11200.00M	\$11220.00M	\$11220.00M
Canadian Exports	\$ 200.00M	\$ 165.00M	\$ 162.00M	\$ 246.00M
Canadian Share of Import Market	1.60%	1.50%	1.40%	2.20%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	095 %
ii) 051 UNITED KINGDOM	002 %
iii) 128 GERMANY WEST	001 %
iv) 112 FRANCE	001 %
v) 237 ITALY	001 %
vi) 038 BELGIUM	001 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Market share declining

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) MILSPEC COMPONENTS	\$ 0.00 M
ii) SIMULATION AND TRAINING EQUIPMENT	\$ 0.00 M
iii) AIR DEFENCE SYSTEMS	\$ 0.00 M
iv) ELECTRONIC SUB-SYSTEMS	\$ 0.00 M

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

i) Project Name: U.S. ARMY FORWARD AIR DEFENCE SYSTEM-COMPONENTS.

Approximate Value: \$ 1000 M

Financing Source:

For further info. please contact:

1) M. FINE, ORLANDO OR K.G. DEWOLFE, ATLANTA

## Export and Investment Promotion Planning System

MISSION: 619 ATLANTA

COUNTRY: 577 UNITED STATES OF AMERICA

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

ii) Project Name: U. S. ARMY LIGHT ARMoured VEHICLE

Approximate Value: \$ M

Financing Source:

For further info. please contact:

K. G. DEWOLFE, ATLANTA.

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- the apparent limited sectoral capability in Canada compared to other competing export countries
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters
- other factor(s) described by the Trade Office as follows:

INVESTMENT REQUIRED TO MEET MILSPECS.

2. DIFFICULTY OF ACCESS TO U. S. MILITARY COMMANDS.

3. RESTRICTIONS ON PARTICIPATION IN SOME PROGRAMS.

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade missions
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: PREPARE DIRECTORY OF MARKETING REPRESENTATIVES.

Results Expected: IMPROVED ACCESS TO DEFENCE PRIMES.

Export and Investment Promotion Planning System

MISSION: 619 ATLANTA

COUNTRY: 577 UNITED STATES OF AMERICA

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: ESTABLISH WORKING GROUP FOR JOINT DEVELOPMENT OF TRAINING AND SIMULATION PRODUCTS.

Results Expected: INCREASED PARTICIPATION IN ARMY & NAVY TRAINING AND SIMULATION PROJECTS.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: POST WILL ORGANIZE AND/OR PARTICIPATE IN SEVERAL PROMOTIONAL EVENTS DESIGNED TO INTRODUCE NEW COMPANIES TO THE MARKET.

Results Expected: DEVELOP NEW SALES REPRESENTATION AND DIRECT BUYING CONTACTS FOR AT LEAST 10 COMPANIES. GENERATE NEW EXPORT SALES OF AT LEAST \$2 MILLION.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 619 ATLANTA

Market: 577 UNITED STATES OF AMERICA

Sector: 005 COMM. &amp; INFORM. EQP. &amp; SERV

Subsector: 053 TELECOMMUNICATIONS (INC SPACE)

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	2150.00M	\$ 2000.00M	\$ 1700.00M	\$ 1100.00M
Canadian Exports \$	115.00M	\$ 107.50M	\$ 98.80M	\$ 91.10M
Canadian Share of Import Market	5.30%	5.30%	5.80%	8.20%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	060 %
ii) 265 JAPAN	022 %
iii) 620 EUROPE	010 %
iv) 075 CANADA	005 %
v) 605 ASIA OR FAR EAST	003 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Market share declining

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) TELEPHONE SYSTEMS	\$ 0.00 M
ii) SATELLITE SYSTEMS	\$ 0.00 M
iii) DATA COMMUNICATION SYSTEMS	\$ 0.00 M
iv) MOBILE COMMUNICATION SYSTEMS	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- other factor(s) described by the Trade Office as follows:  
CANADIAN MANUFACTURERS HAVE ESTABLISHED USA SUBSIDIARIES.

## Export and Investment Promotion Planning System

MISSION: 619 ATLANTA

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: PROGRAMMED CALL PROJECT FOR TELCO'S IN TERRITORY.

Results Expected: 1) MISC. SOURCING REQUIREMENTS  
\$300,000 IN SALES  
2) CONTACTS LIST.

Activity: DIRECT MAIL CAMPAIGN TO TELCO'S, MAJOR USERS WITH PRIVATE SYSTEM POTENTIAL WITH TELECOM CATALOG WHEN REPRINTED.

Results Expected: 1) SALES \$100,000  
2) CONTACTS LIST

Activity: FOLLOW-UP CDN. INDUSTRY WHO LAST YEAR PARTICIPATED IN PROMO. EVENTS TO DETERMINE EXPORT SALES RESULTS.

Results Expected:

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: INTRODUCE CDN FIRMS INCLUDING NEW EXPORTERS TO SOUTHEAST USA MARKET THROUGH PARTICIPATION IN TRADE SHOWS.

Results Expected: 5 NEW CDN FIRMS  
\$250,000 SALES.



## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 619 ATLANTA

Market: 577 UNITED STATES OF AMERICA

Sector: 005 COMM. &amp; INFORM. EQP. &amp; SERV

Subsector: 054 COMPUTERS, SOFTWARE &amp; SYSTEMS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	3400.00M	\$ 2900.00M	\$ 2600.00M	\$ 2200.00M
Canadian Exports \$	405.00M	\$ 378.00M	\$ 325.00M	\$ 280.00M
Canadian Share of Import Market	12.00%	13.00%	12.60%	12.50%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	050 %
ii) 265 JAPAN	020 %
iii) 605 ASIA OR FAR EAST	015 %
iv) 620 EUROPE	005 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) SYSTEM COMPONENTS (UARS)	\$ 0.00 M
ii) DATA COMMUNICATIONS	\$ 0.00 M
iii) SOFTWARE	\$ 0.00 M
iv) PERIPHERALS	\$ 0.00 M
v) HARDWARE	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- other factor(s) described by the Trade Office as follows:  
SLOW TO BRING HARDWARE & COMPONENTS TO MARKET.

## Export and Investment Promotion Planning System

MISSION: 619 ATLANTA

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: COMPLETE UAR & INTEGRATOR DATABASE

Results Expected: COMPETITIVE INFO AND ANALYSIS FOR CDN MFRS.

Activity: FOLLOW-UP CDN INDUSTRY WHO PARTICIPATED IN PROMOTIONAL EVENTS TO DETERMINE EXPORT SALES RESULTS.

Results Expected:

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: INTRODUCE CDN FIRMS INCLUDING NEW EXPORTERS TO SOUTHEAST USA MARKET THROUGH PARTICIPATION IN THREE TRADE SHOWS.

Results Expected: 15 NEW CDN FIRMS  
\$600,000 IN SALES.

Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 619 ATLANTA

Market: 577 UNITED STATES OF AMERICA

Sector: 006 ELECTRONICS EQUIP. & SERV

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	3400.00M	\$ 3000.00M	\$ 2500.00M	\$ 2300.00M
Canadian Exports \$	35.00M	\$ 33.00M	\$ 27.30M	\$ 22.30M
Canadian Share of Import Market	1.20%	1.10%	1.10%	1.00%

Major Competing Countries

Market Share

- i) 577 UNITED STATES OF AMERICA 050 %
- ii) 265 JAPAN 020 %
- iii) 605 ASIA OR FAR EAST 020 %
- iv) 620 EUROPE 010 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 30-60 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) FIBER OPTICS	\$ 0.00 M
ii) ELECTRO-OPTICS	\$ 0.00 M
iii) INSTRUMENTATION	\$ 0.00 M
iv) SOLID STATE ELECTRONICSS	\$ 0.00 M
v) COMPONENTS FOR SYSTEMS	\$ 0.00 M
vi) PRINTED CIRCUITS	\$ 0.00 M
vii) CONSUMER ELECTRONICS	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- non competitive pricing
- the apparent limited sectoral capability in Canada compared to other competing export countries
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- difficulties in obtaining credit facilities in Canada
- other factor(s) described by the Trade Office as follows:

MANUFACTURERS HAVE NICHE OPPORTUNITIES WITH SPECIAL APPLICATIONS AND NEED TO PUT MORE \$ INTO R & D PRODUCTS TO FILL SPECIFIC NEEDS

## Export and Investment Promotion Planning System

MISSION: 619 ATLANTA

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: DIRECT MAIL CAMPAIGN TO MAJOR COMPONENT MFRS WITH ELECTRONICS CATALOG WHEN AVAILABLE.

Results Expected: 1) SALES \$150,000  
2) CONTACTS LIST.

Activity: FOLLOW-UP CDN INDUSTRY WHO PARTICIPATED IN PROMOTIONAL EVENTS TO DETERMINE EXPORT SALES RESULTS.

Results Expected: \$1 MILLION IN NEW REPORTS.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: PROGRAMMED CALL PROJECT ON MAJOR COMPONENTS MFRS.

Results Expected: 1) SALES \$300,000  
2) CONTACTS LIST.

Activity: INTRODUCE CDN FIRMS INCLUDING NEW EXPORTERS TO SOUTHEAST USA MARKET THROUGH PARTICIPATION IN THREE TRADE SHOWS AND ONE MISSION.

Results Expected: 10 NEW CDN EXPORTERS  
\$500,000 IN SALES.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 619 ATLANTA

Market: 577 UNITED STATES OF AMERICA

Sector: 008 TRANSPORT SYS, EQUIP, COMP, SERV.

Subsector: 081 AUTOMOTIVE

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import)	\$ 18000.00M	\$17000.00M	\$14700.00M	\$12800.00M
Canadian Exports	\$ 250.00M	\$ 230.00M	\$ 200.00M	\$ 170.00M
Canadian Share of Import Market	1.40%	1.40%	1.40%	1.30%

## Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	075 %
ii) 268 KOREA	010 %
iii) 128 GERMANY WEST	008 %
iv) 051 UNITED KINGDOM	005 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) REPLACEMENT PARTS	\$ 0.00 M
ii) BATTERY CHARGERS	\$ 0.00 M
iii) SEALANTS AND OTHER CHEMICALS	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- non competitive pricing
- the apparent limited sectoral capability in Canada compared to other competing export countries

## Export and Investment Promotion Planning System

MISSION: 619 ATLANTA

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: PARTICIPATE IN AT LEAST ONE PROMOTIONAL EVENT IN THIS SUBSECTOR.

Results Expected: INTRODUCE NEW COMPANIES TO MARKET AND DEVELOP SALES REPRESENTATION. REALIZE EXPORT SALES.

Activity: REVIEW AND UPDATE DATA BASE OF SALES REPS AND DISTRIBUTORS AND ENTER INTO WIN EXPORTS.

Results Expected: PROVIDE MORE TIMELY AND ACCURATE INFORMATION TO CANADIAN MANUFACTURERS.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 619 ATLANTA

Market: 577 UNITED STATES OF AMERICA

Sector: 008 TRANSPORT SYS, EQUIP, COMP, SERV.

Subsector: 082 URBAN TRANSIT

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	71.00M	\$ 10.00M	\$ 0.00M	\$ 0.00M
Canadian Exports \$	61.00M	\$ 0.00M	\$ 0.00M	\$ 0.00M
Canadian Share of Import Market	85.00%	0.00%	0.00%	0.00%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	000 %
ii) 268 KOREA	000 %
iii) 112 FRANCE	000 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 60-100 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are  
good market prospects

Current Total Imports

	In Canadian \$
i) MONORAIL	\$ 0.00 M
ii) LIGHT RAIL VEHICLES	\$ 0.00 M
iii) AUTOMATED GUIDEWAY	\$ 0.00 M
iv) COMMUTER RAIL	\$ 0.00 M

Projects or portion of projects which are still in the planning  
stage and for which Canadian companies might have reasonable prospects.

i) Project Name: TAMPA URBAN TRANSIT  
Approximate Value: \$ 20 M  
Financing Source: 012 DOM  
For further info. please contact:  
M. FINE, ORLANDO

ii) Project Name: FLORIDA HIGH SPEED RAIL  
Approximate Value: \$ 100 M  
Financing Source: 012 DOM  
For further info. please contact:  
M. FINE, ORLANDO

## Export and Investment Promotion Planning System

MISSION: 619 ATLANTA

COUNTRY: 577 UNITED STATES OF AMERICA

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

- iii) Project Name: DISNEY WORLD MONORAIL EXPANSION  
 Approximate Value: \$ 50 M  
 Financing Source: 012 DDM  
 For further info. please contact:  
 M. FINE, ORLANDO

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- non-tariff protectionist measures which are difficult to overcome
- other factor(s) described by the Trade Office as follows:  
 RELATIVELY NEW BUT GROWING MARKET WITH SIGNIFICANT POTENTIAL BUT  
 "BUY AMERICAN" POLICIES HAVE AN IMPORTANT DETRIMENTAL EFFECT.

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade missions
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: UPDATE OF TRANSIT PROJECTS AND CANADIAN PROSPECTS.

Results Expected: INDICATE WHERE WE SHOULD CONCENTRATE MARKET-  
 ING EFFORTS.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ORGANIZE PROMOTIONAL EVENTS AS APPROPRIATE AS POTENTIAL  
 PROJECTS COME TO FRUITION.

Results Expected: INFLUENCE DECISION MAKERS IN FAVOR OF CANADI-  
 AN EQUIPMENT AND SERVICES.



## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 619 ATLANTA

Market: 577 UNITED STATES OF AMERICA

Sector: 008 TRANSPORT SYS, EQUIP, COMP, SERV.

Subsector: 083 MARINE INDUSTRIES

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	197.10M	\$ 187.10M	\$ 177.00M	\$ 161.00M
Canadian Exports \$	38.80M	\$ 33.80M	\$ 22.60M	\$ 21.00M
Canadian Share of Import Market	19.60%	18.00%	12.70%	13.00%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	070 %
ii) 434 TAIWAN	008 %
iii) 265 JAPAN	004 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 5-15 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects  
i) SAILBOATS

Current Total Imports In Canadian \$  
\$ 25.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

## Export and Investment Promotion Planning System

MISSION: 619 ATLANTA

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: IDENTIFICATION OF AGENTS, DEALERS, DISTRIBUTORS, WITH THEIR SPECIFIC INTERESTS AND MARKETS. INPUT OF SAME INTO POST COMPUTER.

Results Expected: HAVE UP TO DATE LISTS AND MARKET DATA FOR REFERRAL TO CANADIAN COMPANIES.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: INVESTIGATE SPECIFIC MARKET OPPORTUNITIES WITH REGARD TO BOAT SIZE, SPECIFIC CONFIGURATION, ETC.

Results Expected: REPORT SPECIFIC MARKETS TO CANADIAN COMPANIES

Activity: ORGANIZED AND IMPLEMENTS TWO NEW PROMOTIONAL EVENTS IN ORDER TO INTRODUCE OR ENHANCE THE MARKET SHARE OF CANADIAN COMPANIES.

Results Expected: HAVE FIVE TO TEN CANADIAN COMPANIES HEAVILY INVOLVED IN MARKET.

Activity: HAVE ONE-ON-ONE INTERVIEWS WITH DISTRIBUTORS AND AGENTS IN INDUSTRY.

Results Expected: BE ABLE TO MAKE SPECIFIC MARKET CONTRACTS FOR CANADIAN COMPANIES.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 619 ATLANTA

Market: 577 UNITED STATES OF AMERICA

Sector: 009 FOREST PRODUCTS, EQUIP, SERVICES

Subsector: 096 EQUIPMENT AND MACHINERY

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	100.00M	\$ 90.50M	\$ 86.20M	\$ 82.10M
Canadian Exports \$	10.00M	\$ 9.00M	\$ 8.60M	\$ 8.20M
Canadian Share of Import Market	10.00%	10.00%	10.00%	10.00%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	065 %
ii) 620 EUROPE	020 %
iii) 075 CANADA	003 %
iv) 265 JAPAN	003 %
v) 047 BRAZIL	003 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) ENERGY RECLAMATION	\$ 0.00 M
ii) FELLERS	\$ 0.00 M
iii) MATERIAL HANDLING	\$ 0.00 M
iv) WALTER/AIR CLEANING	\$ 0.00 M
v) WOOD YARD EQUIPMENT	\$ 0.00 M
vi) PULP CLEANING	\$ 0.00 M
vii) SKIDDERS	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

## Export and Investment Promotion Planning System

MISSION: 619 ATLANTA

COUNTRY: 577 UNITED STATES OF AMERICA

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- difficulties of adaptation of marketing techniques to the market by some Canadian companies

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: DEVELOP CURRENT INFORMATION ON FORESTRY EQUIPMENT MACHINERY AND SERVICES VIS-A-VIS CANADIAN SUPPLY CAPABILITY AND AGENTS, REPS, AND USERS, DISTRIBUTORS, ETC... IN POST TERRITORY.

Results Expected: INCORPORATE FIFTY NEW FIRMS INTO WIN ENABLING IMPROVED MATCHING.

Activity: VISIT PULP AND PAPER MILLS TO PROMOTE USE OF CANADIAN EQUIPMENT, ESTABLISH CONTACTS, VIEWS OPERATIONS.

Results Expected: REPORTS ON REGIONAL INDUSTRY AND ESTABLISH A PROMOTIONAL PROGRAM.

Activity: ORGANIZE AND IMPLEMENT A PROMOTIONAL EVENT, APPROPRIATE TO EXPAND EXPORTS SALES AND INTRODUCE NEW CANADIAN COMPANIES INTO THE POST TERRITORY.

Results Expected: ACQUIRE TWENTY NEW CONTACTS (AGENTS, REPS, ETC) ACHIEVE DIRECT SALES \$250,000.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 619 ATLANTA

Market: 577 UNITED STATES OF AMERICA

Sector: 013 CONSUMER PRODUCTS

Subsector: 135 FURNITURE &amp; APPLIANCES

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1500.00M	\$ 2.50M	\$ 2.40M	\$ 2.00M
Canadian Exports \$	285.00M	\$ 275.00M	\$ 225.00M	\$ 200.00M
Canadian Share of Import Market	10.50%	9.75%	10.50%	10.00%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	060 %
ii) 128 GERMANY WEST	004 %
iii) 434 TAIWAN	016 %
iv) 093 DENMARK	003 %
v) 237 ITALY	005 %
vi) 599 YUGOSLAVIA	002 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- other factor(s) described by the Trade Office as follows:  
ABOVE NOT APPLICABLE. CANADIAN MANUFACTURERS WITH EXPORT CAPABILITIES ARE CONTINUING TO ENTER AND BECOME ESTABLISHED IN THIS MARKET.

## Export and Investment Promotion Planning System

MISSION: 619 ATLANTA

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: IMPUT OF RESIDENTIAL CONTACTS - U. S. AND CANADIAN IN WIN SYSTEM.

Results Expected: INCLUDE 350 FIRMS INTO SYSTEM.

Activity: FOLLOW-UP WITH BUYERS ATTENDING MONTREAL FURNITURE SHOW, JUNE 1987. FOLLOW-UP WITH CDN. MANUFACTURERS ASSITED 87/88.

Results Expected: \$500,000 IN SALES.

Activity: CONTINUED CONTACT WITH CDN. MANUFACTURERS AND REPS AND SUPPORT PARTICIPATION IN SOUTHERN FURNITURE MARKET, REGIONAL AND CDN. SHOWS AS APPROPRIATE.

Results Expected: 10 NEW AGENTS.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: WORK WITH REPS IDENTIFIED IN 87/88 WHO ARE SEEKING CANADIAN LINES . ENCOURAGE CDN. MANUFACTURERS TO USE CONSULATE RECEPTION AREA TO EXHIBIT FURNITURE.

Results Expected: \$800,000 IN SALES.

Activity: IDENTIFY K. D. REPS AND BUYERS AND ENCOURAGE THEM TO VISIT CDN. MANUFACTURERS IN RTA SHOW, ATLANTA, NOV. 1988

Results Expected: \$1,000,000 IN SALES.

Export and Investment Promotion Planning System

MISSION: 619 ATLANTA

COUNTRY: 577 UNITED STATES OF AMERICA

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: IDENTIFY AND MEET WITH NEW POTENTIAL BUYERS. INVITE APPROPRIATE BUYERS TO CDN. FURNITURE SHOWS - TORONTO/MONTREAL.

Results Expected: 15

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 619 ATLANTA

Market: 577 UNITED STATES OF AMERICA

Sector: 013 CONSUMER PRODUCTS

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	0.00M	\$ 0.00M	\$ 0.00M	\$ 0.00M
Canadian Exports \$	0.00M	\$ 0.00M	\$ 0.00M	\$ 0.00M
Canadian Share of Import Market	0.00%	0.00%	0.00%	0.00%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	000 %
ii) 268 KOREA	000 %
iii) 434 TAIWAN	000 %
iv) 237 ITALY	000 %
v) 520 THAILAND	000 %
vi) 192 PEOPLE'S REP OF CHINA	000 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

## Products/services for which there are good market prospects

## Current Total Imports

	In Canadian \$
i) FURS	\$ 0.00 M
ii) GIFTWARE	\$ 0.00 M
iii) HARDWARE/HOUSEWARES	\$ 0.00 M
iv) SPORTING GOODS	\$ 0.00 M
v) LEISURE PRODUCT INC. TOYS	\$ 0.00 M
vi) JEWELLERY	\$ 0.00 M
vii) APPAREL	\$ 0.00 M
viii) ARTS & CRAFTS	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low



## Export and Investment Promotion Planning System

MISSION: 619 ATLANTA

COUNTRY: 577 UNITED STATES OF AMERICA

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- the unsuitability of Canadian products for this market
- the apparent limited sectoral capability in Canada compared to other competing export countries
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- high tariffs

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: CONTINUED IDENTIFICATION OF NEW EFFECTIVE AGENTS FOR ALL CONSUMER ITEMS.

Results Expected: PROJECTED RESULTS ACHIEVED 1987/88. ANTICIPATE ADDITIONAL 30 CAN BE IDENTIFIED IN 88/89.

Activity: CONTINUED IDENTIFICATION.

Results Expected:

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: IDENTIFICATION OF APPROPRIATE BUYERS AND/OR AGENTS TO ATTEND FESTIVAL OF FASHIONS AND MODE ACCESSORIES, TORONTO. INCORPORATE INTO WIN SYSTEM. SAME FOR FURS & JEWELLERY.

Results Expected: 50 BUYERS

Export and Investment Promotion Planning System

MISSION: 619 ATLANTA

COUNTRY: 577 UNITED STATES OF AMERICA

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: FOLLOW-UP WITH CONTACTS --CDN. & US MADE AT WORLDSTORE '88 AND INCORPORATE IN WIN SYSTEM.

Results Expected: 10 CANADIAN  
15 U.S.  
\$2 MILLION IN SALES.

Activity: CONCENTRATE ON MARKET I.D. BY DESIGNATING ONE DAY WEEKLY TO CALL ON AND MEET U.S. REPS AND BUYERS ON RECORD AND TO IDENTIFY NEW POTENTIAL REPS AND BUYERS AND DETERMINE OPPORTUNITIES.

Results Expected:

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 619 ATLANTA

Market: 577 UNITED STATES OF AMERICA

Sector: 014 EDUCATION, MEDICAL, HEALTH PROD

Subsector: 142 HOSP. &amp; MEDICAL EQUIP, INSTRUM.

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	540.00M	\$ 523.00M	\$ 498.00M	\$ 474.00M
Canadian Exports \$	8.00M	\$ 7.50M	\$ 7.00M	\$ 6.60M
Canadian Share of Import Market	1.50%	1.40%	1.40%	1.40%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	070 %
ii) 620 EUROPE	020 %
iii) 605 ASIA OR FAR EAST	010 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 5-15 \$M

## Current status of Canadian exports:

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) HOSPITAL EQUIPMENT	\$ 0.00 M
ii) MEDICAL EQUIPMENT	\$ 0.00 M
iii) HOME CARE EQUIPMENT	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- non competitive pricing
- the apparent limited sectoral capability in Canada compared to other competing export countries
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

## Export and Investment Promotion Planning System

MISSION: 619 ATLANTA

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- competitive export pricing for this market

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: UNDERTAKE A PROMOTIONAL EVENT ASSOCIATED WITH BIOTECHNOLOGY E. G. AMERICAN SOCIETY FOR MICROBIOLOGY IN MIAMI. FEB. 1988.

Results Expected: INTRODUCE 5 CANADIAN COMPANIES TO THIS MARKET AREA. IDENTIFY 20 REPS/AGENTS/ETC. \$350,000 SALES.

Activity: MONITOR AND REVIEW SEVERAL SPECIALIZED MEDICAL TRADE SHOWS TO DETERMINE PROSPECT FOR PROMOTIONAL ACTIVITIES.

Results Expected: EVALUATE AND REPORT ON 4 INT'L CONVENTIONS TRADE SHOWS.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ORGANIZED AND IMPLEMENT 4 PROMOTIONAL PROJECTS FOCUSED ON INTRODUCING CDN FIRMS INTO POST TERRITORY AND IDENTIFYING LOCAL AGENTS, REPS, DISTRIBUTORS, ETC.

Results Expected: 40 AGENTS/REPS/DISTRIBUTORS \$1. MILLION IN SALES.

Activity: IDENTIFY CANADIAN SUPPLY CAPABILITY IN SPECIALIZED MEDICAL SECTORS. E. G. OPTOMOLOGY ETC.

Results Expected: IDENTIFY 20 NEW CANADIAN COMPANIES AND INSERT INTO WIN.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 619 ATLANTA

Market: 577 UNITED STATES OF AMERICA

Sector: 015 CONSTRUCTION INDUSTRY

Subsector: 151 BUILDING PRODUCTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1350.00M	\$ 1300.00M	\$ 1250.00M	\$ 1200.00M
Canadian Exports \$	1012.00M	\$ 975.00M	\$ 946.00M	\$ 900.00M
Canadian Share of Import Market	75.00%	75.00%	75.00%	75.00%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	085 %
ii) 075 CANADA	011 %
iii) 605 ASIA OR FAR EAST	003 %

Cumulative 3 year export potential for CDN products  
in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) MANUFACTURED WOOD PRODUCTS	\$ 350.00 M
ii) OTHER FOREST PRODUCTS	\$ 450.00 M
iii) CANINETS	\$ 50.00 M
iv) HARDWARE	\$ 50.00 M
v) PLUMBING SUPPLIES	\$ 25.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- the apparent limited sectoral capability in Canada compared to other competing export countries

## Export and Investment Promotion Planning System

MISSION: 619 ATLANTA

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: DEVELOP CURRENT INFORMATION ON BUILDING MATERIAL AGENTS AND DISTRIBUTORS IN POST TERRITORY.

Results Expected: IMPROVED MATCHING OF CANADIAN SUPPLIERS WITH APPROPRIATE LOCAL REPRESENTATION. INCORPORATE INTO WIN.

Activity: UPGRADE QUANTITY AND QUALITY OF CANADIAN SUPPLIERS ON WIN EXPORTS.

Results Expected: EXPOSE MORE COMPANIES TO OPPORTUNITIES IN POST TERRITORY.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ORGANIZE AND IMPLEMENT THREE PROMOTIONAL EVENTS TO EXPAND EXPORT SALES AND INTRODUCE NEW CANADIAN COMPANIES TO POST TERRITORY MARKET.

Results Expected: ACQUIRE SIXTY NEW CONTACTS (AGENTS, REPS, ETC.) ACHIEVE DIRECT SALES OF \$75000 AND PROJECT ONE YEAR SALES \$300,000

Activity: IDENTIFY THE VARIOUS MARKETING/DISTRIBUTE CHANNELS UTILIZE FOR BUILDING PRODUCTS IN THE SOUTH EAST.

Results Expected: IMPROVED COUNSELLING TO CANADIAN BUILDING MATERIALS SUPPLIERS SEEKING TO APPROPRIATELY MARKET THEIR PRODUCTS IN POST TERRITORY. PREPARED BROCHURES.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 619 ATLANTA

Market: 577 UNITED STATES OF AMERICA

Sector: 016 INDUSTRIAL MACHIN, PLANTS, SERV.

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	4180.00M	\$ 3800.00M	\$ 3500.00M	\$ 2820.00M
Canadian Exports \$	250.00M	\$ 188.00M	\$ 150.00M	\$ 160.00M
Canadian Share of Import Market	5.20%	4.90%	4.30%	5.60%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	055 %
ii) 620 EUROPE	015 %
iii) 434 TAIWAN	010 %
iv) 268 KOREA	005 %
v) 265 JAPAN	005 %
vi) 616 OTHER COUNTRIES	010 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) MATERIAL HANDLING AUTOMATION	\$ 0.00 M
ii) INSTRUMENTS AND SYSTEM EQUIPMENT	\$ 0.00 M
iii) (METAL FAB. AND TOOL/DIE)ENGINEERED PRODUCTS	\$ 0.00 M
iv) ROBOTIC/CAD/CAM/CIM	\$ 0.00 M
v) INDUSTRIAL MACHINERY	\$ 0.00 M
vi) PACKAGING MACHINERY	\$ 0.00 M
vii) ENGINEERING	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

## Export and Investment Promotion Planning System

MISSION: 619 ATLANTA

COUNTRY: 577 UNITED STATES OF AMERICA

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- the apparent limited sectoral capability in Canada compared to other competing export countries
- other factor(s) described by the Trade Office as follows:  
"BUY AMERICAN" IN SOME SECTORS/SUBSECTORS.

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: CONTINUE TO BUILD "CONTACT" NETWORK OF BOTH CANADIAN SUPPLIERS AND S. E. U. S. A. AGENTS, DISTRIBUTORS, REPS, ETC.

Results Expected: GET AN ADDITIONAL 200 CONTACTS AND ENTER INTO WIN. DIRECT SALES \$300,000.

Activity: DETERMINE IF RESULTS PROJECTED IN ACTIVITIES UNDERTAKEN IN 87/88 WERE ACHIEVED.

Results Expected: REPORT \$400,000 SALES.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ORGANIZE AND IMPLEMENT FIVE PROMOTIONAL EVENTS AS APPROPRIATE TO EXPAND EXPORT SALES AND INTRODUCE NEW CANADIAN COMPANIES TO THE S. E. U. S. A. WAS SET.

Results Expected: ACQUIRE 150 NEW CONTACTS (AGENTS, REPS, ETC.) ACHIEVE DIRECT SALES \$500,000 AND PROJECT ONE YEAR SALES OF \$1 MILLION.

Activity: UNDERTAKE BRIEFING (WORKSHOPS) AT POST BETWEEN U. S. END USERS, REPS, ETC AND CANADIAN FIRMS TO INCREASE AWARENESS OF MARKET NEEDS.

Results Expected: FIVE WORKSHOPS.



Export and Investment Promotion Planning System

MISSION: 619 ATLANTA

COUNTRY: 577 UNITED STATES OF AMERICA

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: IDENTIFY AND MEET WITH NEW POTENTIAL BUYERS TO DETERMINE PROJECTS AND OPPORTUNITIES.

Results Expected: INCREASE AWARENESS OF CANADIAN CAPABILITY AND DETERMINE NEW AREAS OF ACTIVITIES.

## Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights  
Submitted by Posts by Region

Region: UNITED STATES

Mission: 619 ATLANTA

Market: 577 UNITED STATES OF AMERICA

Sector: 017 SERVICE INDUSTRIES

Subsector: 171 DISTRIBUTION

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	300.00M	\$ 290.00M	\$ 285.00M	\$ 270.00M
Canadian Exports \$	10.00M	\$ 8.00M	\$ 6.00M	\$ 6.00M
Canadian Share of Import Market	3.30%	2.70%	2.10%	2.20%

## Major Competing Countries

## Market Share

i) 577 UNITED STATES OF AMERICA	085 %
ii) 265 JAPAN	005 %
iii) 609 EUROPEAN COMMON MARKET C	005 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 5-15 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) WAREHOUSE SERVICES	\$ 0.00 M
ii) MOVERS/FREIGHT PACKERS/FORWARDERS	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters
- other factor(s) described by the Trade Office as follows:  
OFFERING INCOMPLETE SERVICES AT HIGH PRICES

## Export and Investment Promotion Planning System

MISSION: 619 ATLANTA

COUNTRY: 577 UNITED STATES OF AMERICA

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: DATABASE COMPILATION OF BOTH CANADIAN AND POST COMPANY SERVICE PROVIDERS.

Results Expected: 1) 100 SERVICE PROVIDERS TO ASSIST CDN. MANUFACTURERS. 2) LIST OF POTENTIAL EVENTS.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: PROPOSE A MARKET STUDY FOR THIS SUB-SECTION FOCUSING ON ATLANTA.

Results Expected: ENABLE A DEFINED PROGRAM TO BE IMPLEMENTED.

Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 619 ATLANTA

Country: 577 UNITED STATES OF AMERICA

## Highlights of Investment Environment

Estimated Value Of Equity Investment  
In Canada From This Post Territory:

\$ 3 770.00 M

Estimated Value Of Annual Direct Equity  
Investments To All Destinations From  
This Post Territory:

\$ 7 470.00 M

Country Destinations Of Direct  
Equity Investment From Post  
TerritoryEstm. Value  
\$ CDN% Of Annual Direct Equity  
Investment Outflows By  
Category Of Investors

1. 620 EUROPE	\$ 1 750.00 M	1. Corporations : 80.00 %
2. 075 CANADA	\$ 767.00 M	2. Institutional : 13.00 %
3. 610 LATIN AMERICA	\$ 494.00 M	3. Entrepreneurs : 5.00 %
4. 265 JAPAN	\$ 52.00 M	4. Immigrant Entr.: 2.00 %

The Mission Has Reported Factors That Tend To Change  
Outward Flows Of Investment From The Post Territory Including:

- Emigration
- Corporate Expansion To Seek New Markets
- Corporate Expansion To Serve Better Existing Markets

The Mission Reports That Investors From The Post Territory Who Invest Abroad  
In Manufacturing Tend To Invest In The Following Sector(s) Subsector(s)

-SECTOR(S)-

-SUBSECTOR(S)-

- |  |                |
|--|----------------|
| 1. 013 CONSUMER PRODUCTS                 |                |
| 2. 014 EDUCATION, MEDICAL, HEALTH PROD   |                |
| 3. 008 TRANSPORT SYS, EQUIP, COMP, SERV. | 081 AUTOMOTIVE |

## Equity Propensity Of Key Sources Of Investment From This Territory

Corporations	: Start-up Investment To Create New Enterprise (100% Ownership)
Institutional	: Partial Ownership Of Existing Corporate Facilities With Direct Involvement In Day-to-Day Operations
Entrepreneurs	: Start-up Investment To Create New Enterprise (100% Ownership)
Immigrant Entr.	: Start-up Investment To Create New Enterprise (100% Ownership)

DATE: 88/01/25

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 619 ATLANTA

Country: 577 UNITED STATES OF AMERICA

**Sector Preferences By Type Of Key Investors**

Corporations : Services  
Institutional : Portfolio Investment  
Entrepreneurs : Services  
Immigrant Entr. : Services

**Investment Promotion Priority Sectors Sub-Sectors  
Program Plans And Anticipated Results.**

Sector : 014 EDUCATION, MEDICAL, HEALTH PROD  
Subsector: 142 HOSP. & MEDICAL EQUIP, INSTRUM.

**Reason(s):**

A DEMONSTRATED INTEREST BY THIS SECTOR IN THE US TO LOOK TO CDA AS A LOCATION FOR A MANUFACTURING OPERATIONS EQUIPMENT INQUIRY RECEIVED AT NATIONAL HOME HEALTH CARE TRADE SHOW.

**Program Plans:**

DIRECT MAIL TO FIRMS HQ'D IN POST TERRITORY WITH VISITS TO THOSE WITH THE GREATEST POTENTIAL. PART. IN IMPORTANT MEDICAL TRADE SHOWS WITH THE GREATEST POTENTIAL FOR INVEST., JV & TECHNOLOGY TRANSFER OPPORTUNITIES. ORGANIZE TECH TRANS/JV ORIENTED MISSION OF CDN FIRMS IN CONJUNC-

**Anticipated Results: 40 INQUIRIES; 6 MISSION PARTICIPANTS**

Sector : 005 COMM. & INFORM. EQP. & SERV  
Subsector:

**Reason(s):**

A SERIES OF IMPORTANT TRADE SHOWS INCLUDING COMDEX ENABLES AN ACTIVE RECRUITING PROCESS TO BE UNDERTAKEN. STRATEGIC PARTNERING HAS PROVEN TO BE EFFECTIVE IN THIS SECTOR.

**Program Plans:**

DIRECT MAIL TO FIRMS HEADQUARTERED IN POST TERRITORY WITH VISITS TO THOSE WITH THE GREATEST POTENTIAL. PARTICIPATE IN IMPORTANT COMMUNICATION & COMPUTER TRADE SHOWS.

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 619 ATLANTA

Country: 577 UNITED STATES OF AMERICA

Investment Promotion Priority Sectors Sub-Sectors  
Program Plans And Acticipated Results.

Sector : 005 COMM. & INFORM. EQP. & SERV  
Subsector:

Anticipated Results: 40 INQUIRIES

Sector : 004 DEFENCE PROGRAMS, PRODUCTS, SERV  
Subsector: 044 OTHER DEFENSE PROD & SERV.

Reason(s):

THERE IS A NUMBER OF LARGE & MEDIUM SIZED FIRMS SERVING THIS SECTOR IN POST TERRITORY. THEREFORE A SUBSTANTIAL POTENTIAL TO RECRUIT THEM REGARDING OPERATIONS IN CANADA.

Program Plans:

UNDERTAKE CORP. LIAISON WITH KEY COMPANIES IN THIS SECTOR. TARGET FLORIDA COS. WITH INTEREST IN POTENTIALLY JV WITH CDN FIRMS AND/OR INVESTING IN CDA. ORGANIZE R&D PROJECTS DEFENCE MISSION OF CDN COMPANIES TO GEORGIA & FLORIDA IN CONJUNCTION WITH MAJOR EVENTS.

Anticipated Results: 8 CORPORATE LIAISON VISITS; 25 SEMINAR PARTICIPANTS; 10 MISSION PARTICIPANTS

Sector : 016 INDUSTRIAL MACHIN, PLANTS, SERV.  
Subsector: 161 MANUFACT & MATERIAL PLANT, EQP.

Reason(s):

AGAIN IMPORTANT TRADE SHOWS IN POST TERRITORY ENABLES AN ACTIVE RECRUITING CAMPAIGN. POST PROPOSES BOOTHS AT THESE SHOWS.

Program Plans:

PARTICIPATE IN IMPORTANT NATIONAL OR INTERNATIONAL TRADE SHOWS BEING HELD IN POST TERRITORY.

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 619 ATLANTA

Country: 577 UNITED STATES OF AMERICA

Investment Promotion Priority Sectors Sub-Sectors  
Program Plans And Actipicipated Results.

Sector : 016 INDUSTRIAL MACHIN, PLANTS, SERV.

Subsector: 161 MANUFACT & MATERIAL PLANT, EQP.

Anticipated Results: 25 INQUIRIES

Sector : 006 ELECTRONICS EQUIP. & SERV

Subsector: 061 PRODUCTS & COMPONENTS

Reason(s):

A VERY WIDE RANGING SECTOR WHICH AT PRESENT SEEMS TO BE THE MOST INTERESTED & ACTIVE IN "LOOKING" TO CANADA FOR INVESTMENT PURPOSES.

Program Plans:

DIRECT MAIL TO FIRMS HEADQUARTERED IN POST TERRITORY WITH VISITS TO THOSE WITH THE GREATEST POTENTIAL.

Anticipated Results: 25 INQUIRIES

Other Investment Program Plans

Activity(ies):

ADVERTISE CDA AS AN ATTRACTIVE PLACE TO INVEST IN TARGETTED INVESTMENT ORIENTED PUBLICATIONS.

Anticipated Results: 50 INQUIRIES

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 619 ATLANTA

Country: 577 UNITED STATES OF AMERICA

**Other Investment Program Plans**

**Activity(ies):**

RECRUIT A PROFESSIONAL INDUSTRIAL COMMISSIONER (ONE MONTH) TO EXAMINE ALL INQUIRIES & FOLLOW-UP ON RELEVANT INQUIRIES WITH PERSONAL CALLS.

**Anticipated Results:** 10 DIRECT INVESTMENTS

**Activity(ies):**

IDENTIFY & PROFILE SECTORS IN POST TERRITORY WHICH HAVE SIGNIFICANT & POTENTIAL FOR TECHNOLOGY TRANSFER OPPORTUNITIES WITH CDN FIRMS.

**Anticipated Results:** 5 SECTOR PROFILES



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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 619 ATLANTA

Country: 577 UNITED STATES OF AMERICA

Investment Promotion Activities Proposals

Type Of Event: 040 DIRECT MAIL CAMPAIGN

Description: DIRECT MAIL CAMPAIGN TO TARGETTED INDUSTRY SECTORS  
Priority: 2 Date: 00/88  
Sector: 999 MULTIPLE SECTORS  
Sub-Sector: 999 ALL SUB-SECTORS  
Location:

Type Of Event: 050 SEMINARS

Description: INVESTMENT TECHNOLOGY TRANSFER SEMINAR  
Priority: 3 Date: 07/88  
Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV  
Sub-Sector: 999 ALL SUB-SECTORS  
Location: ORLANDO

Type Of Event: 070 OTHER PROMOTIONAL EVENTS

Description: COMDEX 88 (POST EXHIBIT)  
Priority: 1 Date: 05/88  
Sector: 005 COMM. & INFORM. EQP. & SERV  
Sub-Sector: 999 ALL SUB-SECTORS  
Location: ATLANTA

Description: INTERNATIONAL WOODWORKING SHOW (IWWS-88)  
Priority: 1 Date: 08/88  
Sector: 016 INDUSTRIAL MACHIN, PLANTS, SERV.  
Sub-Sector: 999 ALL SUB-SECTORS  
Location: ATLANTA

Description: AMERICAN MICROBIOLOGY SOCIETY (AMS) TRADE SHOW  
Priority: 1 Date: 05/88  
Sector: 014 EDUCATION, MEDICAL, HEALTH PROD  
Sub-Sector: 142 HOSP. & MEDICAL EQUIP, INSTRUM.  
Location: MIAMI

DATE: 88/01/25

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: USA

Mission: 619 ATLANTA

Country: 577 UNITED STATES OF AMERICA

Investment Promotion Activities Proposals

Type Of Event: 070 OTHER PROMOTIONAL EVENTS

Description: CNT EXPER. INDUS. COM. FOLLOWUP ON LDS GEN. INDUS.

Priority: 7 Date: 03/89

Sector: 999 MULTIPLE SECTORS

Sub-Sector: 999 ALL SUB-SECTORS

Location:

Description: THREE ADS IN SITE SELECTION HANDBOOK MAGAZINE

Priority: 6 Date: 06/88

Sector: 999 MULTIPLE SECTORS

Sub-Sector: 999 ALL SUB-SECTORS

Location:

Type Of Event: 071 INCOMING MISSION

Description: TECHNOLOGY TRANSFER MISSION (CONJ. AMER. MICRO S.)

Priority: 5 Date: 00/00

Sector: 014 EDUCATION, MEDICAL, HEALTH PROD

Sub-Sector: 142 HOSP. & MEDICAL EQUIP, INSTRUM.

Location: MIAMI

Description: R&D PROJECTS DEFENSE MISSION

Priority: 4 Date: 02/89

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: 999 ALL SUB-SECTORS

Location: ATLANTA/ORLANDO

## Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 619 ATLANTA		
Sector: 001 AGRI & FOOD PRODUCTS & SERVICE		
010 FAIRS		
SUNBELT AGRICULTURAL EXPOSTITION	MOULTRIE	1089
FLORIDA RESTAURANT ASSN FOOD SERVICE EXPO	ORLANDO	0989
Sector: 002 FISHERIES, SEA PRODUCTS & SERV.		
010 FAIRS		
SEAFARE SOUTHEAST	ORLANDO	1089
024 MISSION INCOMING		
ATLANTA FISHERIES PROMOTION	ATLANTA	1190
Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV		
010 FAIRS		
DEFENCE COMPONENTS SHOW	ORLANDO	1290
DEFENCE COMPONENTS SHOW	ORLANDO	1289
020 MISSION OUTGOING		
DEFENCE COMPONENTS MISSION	ATLANTA	0589
Sector: 005 COMM. & INFORM. EQP. & SERV		
010 FAIRS		
COMDEX '89	ATLANTA	0589
USITA	ATLANTA	0590
Sector: 006 ELECTRONICS EQUIP. & SERV		
010 FAIRS		
SOUTHCOM	ORLANDO	0390
Sector: 008 TRANSPORT SYS, EQUIP, COMP, SERV.		
010 FAIRS		
UNDERCAR SHOW	NASHVILLE	1089
ATLANTA MARINE TRADES	ATLANTA	0889
MIAMI INTERNATIONAL SAILBOAT SHOW	MIAMI	0290
BIG "I" SHOW	ATLANTA	0391
BIG "I" SHOW	ATLANTA	0390
FT. LAUDERDALE INT'L BOAT SHOW	FT. LAUDERDALE	1189
Sector: 009 FOREST PRODUCTS, EQUIP, SERVICES		
010 FAIRS		
TAPPI	ATLANTA	0390

## Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 619 ATLANTA		
Sector: 013 CONSUMER PRODUCTS		
010 FAIRS SUPERSHOW	ATLANTA	0290
Sector: 014 EDUCATION, MEDICAL, HEALTH PROD		
010 FAIRS NATIONAL HOME HEALTH CARE EXPO	ATLANTA	1189
Sector: 016 INDUSTRIAL MACHIN, PLANTS, SERV.		
010 FAIRS SOUTH PACK EXPO	ATLANTA	0589

Market : UNITED STATES

<u>REFERENCE NO.</u>	<u>SECTOR NO.</u>	<u>EVENT NAME &amp; LOCATION</u>	<u>DATE</u>
880511	016	ASHRAE-AMERICAN SOC OF HEATING REFRIG. & AIR COND., CHICAGO	89/01/30
880450	005	COMDEX FALL 88, LAS VEGAS	88/11/14
880423	013	NATIONAL SPA & POOL ASSN SHOW, HOUSTON	88/11/00
880521	015	PHCPX-PLUMBING, HEATING AND COOLING SHOW, NEW ORLEANS	88/11/00
880529	005	FCC 88(FEDERAL COMPUTER CONF) WASHINGTON	88/10/26
880474	001	SOLO FOOD SHOW, NEW YORK	88/10/00
880476	001	SOLO FOOD SHOW, ALBANY	88/10/00
880532	001	SOLO FOOD SHOW, BUFFALO	88/10/00
880455	008	APAA (AUTO PARTS), CHICAGO	88/07/12
880448	004	AFCEA 88(ARMED FORCES COMMUNICATIONS& ELECTRONICS SHOW)WASH	88/06/14
880411	008	OFFSHORE TECHNOLOGY CONFERENCE (OTC '88), HOUSTON, TEXAS	88/05/02
880758	015	AMERICA EAST 89, BOSTON, MA, USA	89/01/00
880754	008	SPECIALTY EQUIP. MARKET ASSOC. (SEMA), LAS VEGAS	88/11/02
880759	016	1988 FALL NAT'L DESIGN ENGINEERING SHOW, NEW YORK	88/10/11
880755	013	NATIONAL SPORTING GOODS ASSOC., CHICAGO	88/10/00
880753	001	WESTERN RESTAURANT SHOW, SAN FRANCISCO	88/09/00
880756	013	NATIONAL HARDWARE SHOW, CHICAGO	88/08/00

Market : UNITED STATES

<u>REFERENCE NO.</u>	<u>SECTOR NO.</u>	<u>EVENT NAME &amp; LOCATION</u>	<u>DATE</u>
880676	007	AMERICAN WATER WORKS ASSOC. CONF. , ORLANDO, FLORIDA, USA	88/06/14
880678	011	17TH WORLD GAS CONFERENCE WASHINGTON, D. C. , USA	88/06/05
880750	001	BUYERS FROM U. S. TO WESTERN CDA FARM PROGRESS SHOW, REGINA	88/06/00
880751	001	NATIONAL RESTAURANT ASSOC. SHOW, CHICAGO, USA	88/05/21
880650	006	ELECTRO '88, BOSTON, "BAYSIDE BLDG"	88/05/10
880649	006	COMDEX SPRING '88 - ATLANTA, GEORGIA, U. S. A.	88/05/09
880671	008	WASTE EXPO '88 - WASHINGTON	88/05/00
880757	014	NATIONAL HOME HEALTHCARE EXPO. ATLANTA	88/05/00
880677	016	3I SHOW - GREAT BEND, KA. , USA	88/04/27
880752	001	UPPER MIDWEST HOSPITALITY SHOW MINNEAPOLIS	88/04/00
880760	001	SOLO FOOD SHOW, MINNEAPOLIS	00/00/00
880761	001	SOLO FOOD SHOW, BOSTON	00/00/00
880762	001	SOLO FOOD SHOW, CLEVELAND	00/00/00