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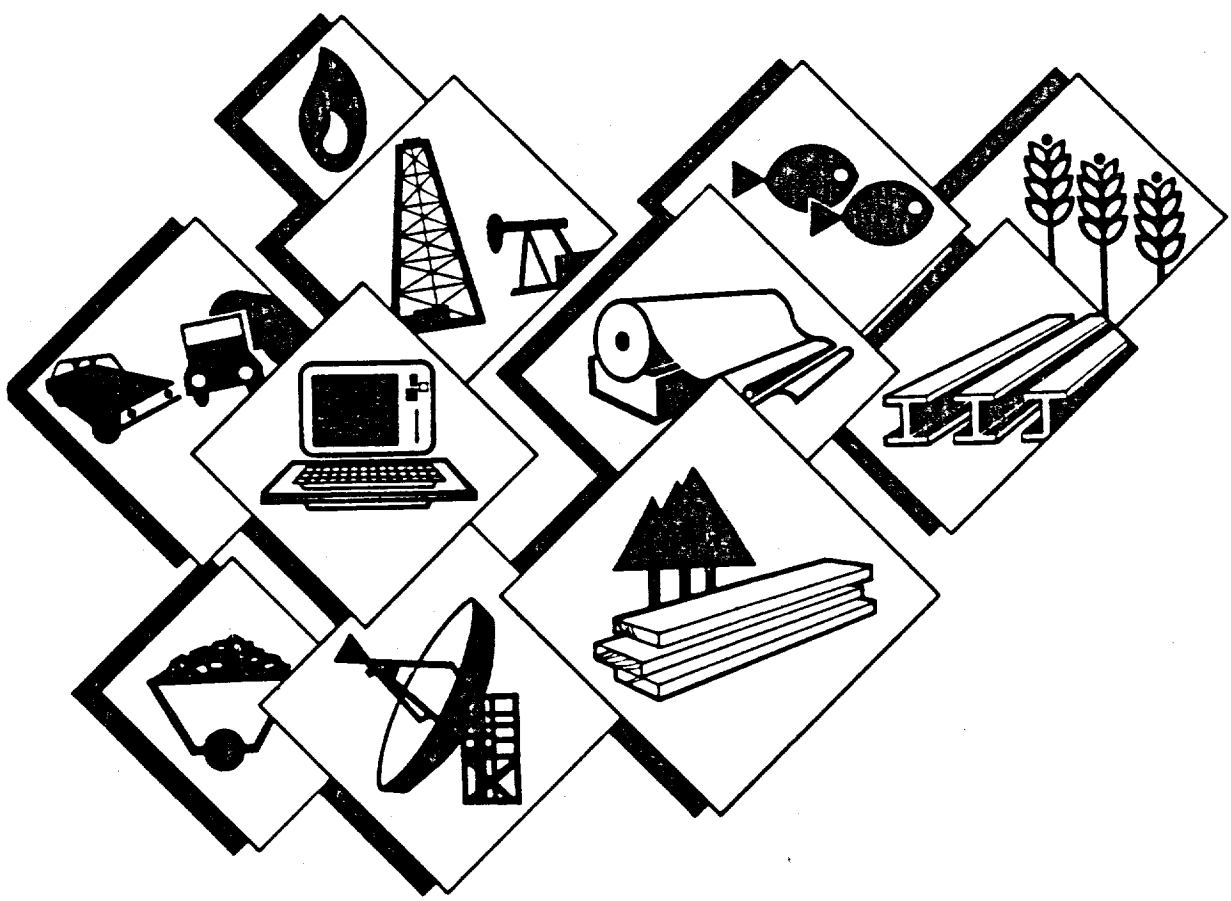
**DRAFT**

# **GEOGRAPHICAL SYNOPSIS FOR CONSULTATION PURPOSES ONLY**

## **AFRICA**

### **1990-91 EXPORT AND INVESTMENT PROMOTION OPERATIONAL PLAN**

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**JANUARY 1990**

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**GEOGRAPHIC SYNOPSIS OF  
EXPORT PROMOTION PROGRAM PLANS  
OF CANADIAN MISSIONS ABROAD  
FY 1990/91**

Dept. of External Affairs  
Min. des Affaires extérieures  
OTTAWA

FEB 7 1990  
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**FORWARD**

This report contains a summary of the highlights of the proposed work plans of the export and investment promotion program of Canadian diplomatic missions in Africa for fiscal year 1990/91 commencing April 1, 1990.

The format of this synopsis is designed to provide Canadians involved in the process of export promotion the means to identify quickly the key components of the trade program of External Affairs and International Trade Canada missions and access conveniently those feature of the plans which are pertinent to their specific interests.

This synopsis is organized alphabetically by mission and is available for each of seven geographic regions. A similar geographic synopsis is also available for the following geographic regions:

Asia Pacific  
Eastern Europe  
Latin America and Caribbean  
Middle East  
United States  
Western Europe

The synopsis provides a trade and economic overview of each country in the region in which market prospects exist for Canadian exporters, a listing of sectoral priorities for each market, profiles of important or interesting sectors as well as proposed promotional projects in support of specific program activities.

The emphasis in the synopsis has been placed on providing factual information in as brief a format as possible with minimal narrative.

The computerized planning system from which this report was produced was developed by the Department of External Affairs and International Trade Canada to facilitate the assembly of vast amounts of detailed information on world markets from some 92 missions abroad. It is programmed to make this information available to government in a format which would enable specific data on sectors or geographic regions to be accessed conveniently.

## II

In their Conference on the Economy held in Regina in 1985, First Ministers noted the major contribution made by the export sector to Canada's national income and expressed concern at the decline of Canada's share of world markets. To meet this challenge, First Ministers endorsed the need to generate widespread support for new trade strategy for Canada which would embody three principal elements:

- a) to increase Canadian competitiveness;
- b) to maintain and increase access to foreign markets;
- and
- c) to achieve more effective international marketing.

It was recognized that these objectives can be met but only if a full and effective partnership of the federal and provincial governments, the private sector and labour can be achieved to ensure a more focused and consistent approach to international marketing. Appropriate means of assembling and organizing information to suit specific needs is a foundation of the process of consultation from which consensus would be reached. To this end the current computerized planning system was conceived.

In addition to the geographic perspective of this report, information from the data bank is available in a variety of configurations, the most important of which are synopses of 16 sectors and a variety of market reports. Information from these reports can be obtained on request from the geographic or sectoral bureaux of the Department.

The purpose of this synopsis is to provide those engaged in the process of promoting exports from Canada the means to obtain condensed market information on export opportunities. It does not attempt to cover all aspects of foreign markets and by design avoids minutiae and detail. It is intended to highlight what, in the opinion of Canadian Trade Commissioners abroad, is important in their respective territories and what tactics they envisage would be most appropriate to exploit the market. Here markets or sectors in these synopses stimulate interest on the part of exporters, they are invited to seek out more detail information and further background direct from the post, the geographic and sectoral bureaux of the External Affairs and International Trade Canada or the International Trade Centres currently located within the provincial offices of Industry, Science and Technology Canada.

### III

A Last word on statistics. The statistical information contained in this synopsis is to be considered as an attempt on the part of the Trade Commissioners abroad to estimate the order or magnitude of market size, market shares, and possible export potential. Users of this synopsis are cautioned that these figures are in many cases best guesses based on discussion with trade sources. In many markets reliable published statistics are simply not available. However, in an attempt to provide exporters with notional ideas of market size, Trade Commissioners have been asked to do their best to give their considered impressions wherever possible. Therefore it is not intended that the statistical information should be used for purposes other than general guidance.

DEPARTMENT OF EXTERNAL AFFAIRS  
 EXPORT AND INVESTMENT PROMOTION PLANNING SYSTEM  
 1990/91 GEOGRAPHIC SYNOPSIS  
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## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 TRADE AND ECONOMIC OVERVIEW

Mission: ABIDJAN

Country: IVORY COAST

La détérioration des cours mondiaux du cacao (en chute libre depuis 84) et du café (-30% depuis juillet 89) persiste et accentue la baisse chronique des revenus du pays. Aussi le gouv. a suspendu le remboursement de sa dette (de + de 14 milliards \$) rééchelonnée en juin 88. Les arrières du service de la dette des Clubs de Londres et de Paris atteignent + de 1 milliard \$. La SEE n'ayant reçu aucune indication que la C.I. reconsidérerait ses créances, a techniquement déclaré le pays en faillite, ce qui complique l'obtention (même dans l'analyse cas par cas) de nouvelle couverture d'assurance-crédit.

La croissance du PIB a été nulle en 88 et le taux de formation du capital minimal, si bien qu'avec une forte croissance démographique constante le revenu par habitant se retrouve maintenant inférieur à son niveau du début de la décennie, soit aux environs de 740\$. Le gel des salaires dans la fonction publique maintenu pour la cinquième année lors du budget général de fonctionnement de 89 ne fera qu'accentuer la baisse de la consommation des ménages tandis que la réduction effective de 50% par rapport à 88 des dépenses d'investissement (BSIE) ne pourra conduire à la relance économique à court terme mais permettra une certaine stabilisation si les accords avec le FMI/BM devaient se concrétiser.

L'activité économique des années fastes a transformé la C.I. en pôle d'attraction pour nombre de travailleurs des pays voisins influençant ainsi par ricochet le développement économique régional. La crise provoquée par la chute continue du prix des matières premières agricoles d'exportation a vite relenti l'économie ivoirienne ou les coûts des facteurs de production sont les + élevés de la région. Une faible productivité alliée à un taux de change trop élevé ont entraîné plusieurs fermetures en C.I. et dans la zone FCFA au point que la presse française a fait état que les intérêts privés français installés au sud du Sahara ont déjà rapatrié 1/4 de leurs actifs en 89.

Les exportations ivoiriennes en 88 ont baissé de 17% et les importations de 9%. Les relations commerciales avec son principal partenaire (France) ont cependant été stables quoiqu'ayant connu pour chacune des 2 années précédentes de déclin successifs de 10%. Le commerce Cdo-ivoirien en 88 a atteint un record de 45.8 m\$ et depuis 85, la balance commerciale demeure favorable à la C.I. L'endettement du pays rend toute transaction commerciale tributaire d'offre de crédit (et préférablement en des termes concessionnels). Après deux ans de tergiversation, la Côte d'Ivoire semble résolu à mettre en oeuvre un plan de redressement économique avec l'appui des institutions de Bretton-Woods. Ce plan qui pour les 18 prochains mois vise la stabilisation de l'économie devrait permettre une certaine croissance économique à compter de 1991. Les flux de capitaux des institutions financières internationales et les nouveaux apports bilatéraux du Japon-USA jumelés aux apports traditionnels de la France, RFA, Italie, Canada devraient accroître la demande de biens et de services dans les secteurs de l'agriculture, forêts, énergie, hydraulique et urbanisme. Les sociétés canadiennes, si elles peuvent démontrer leur compétitivité, bénéficieront de cette situation. Nous retenons aussi comme prioritaire le secteur de technologie de pointe pour nos programmes de promotion.

Quant aux autres pays du territoire, leur économie demeure trop précaire

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: ABIDJAN

Country: IVORY COAST

pour justifier un programme pro-actif d'activités commerciales. Des interventions ponctuelles en réponse à des initiatives privées sont plutôt indiquées.



RPTB2

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 EXPORT PROMOTION PRIORITIES

Mission: ABIDJAN

Country: IVORY COAST

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

## 1. AGRI &amp; FOOD PRODUCTS &amp; SERVICE

Secteur d'activité écono. prioritaire dans lequel part importante de APD va être concentrée pour réaliser restructuration et relance écono. pour nouveaux développements auxquels expertise cdn. peut répondre.

## 2. FOREST PRODUCTS, EQUIP, SERVICES

Secteur d'activité important & privilégié dans prog. de restructuration écono. et pour lequel expertise cdn. reconnue pourrait contribuer (gestion, reboisement, exploitation & formation).

## 3. ADVANCED TECH. PROD. &amp; SERV

Poursuite de effort mktg déjà entrepris dans secteur considéré prioritaire par l'Etat pour introduction de informatique dans milieu scolaire gestion municipale & étatique et prévision de renouvellement du réseau Télécom devraient offrir bonnes opportunités d'affaires.

## 4. POWER &amp; ENERGY EQUIP. &amp; SERV.

Expertise cdn reconnue grâce à présence passée ds secteur suite à prog. ACIDI et besoins d'entretien et gestion du réseau de transmission que va privilégier APD devrait procurer débouchés intéressants.

5.

6.

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

1. AGRI & FOOD PRODUCTS & SERVICE
2. FOREST PRODUCTS, EQUIP, SERVICES
3. CHEM PROD & PETROCHEM, EQP, SERV

4. INDUSTRIAL MACHIN, PLANTS, SERV.
- 5.
- 6.

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ABIDJAN

Market: IVORY COAST

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

Sub-Sector: FOOD HANDLING, PROCESSING EQUIP

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 13.00 \$M   | 12.00 \$M  | 13.00 \$M                   | 15.00 \$M                |
| Canadian Exports            | 0.00 \$M    | 0.00 \$M   | 0.00 \$M                    | 1.00 \$M                 |
| Canadian Share<br>of Market | 0.00 %      | 0.00 %     | 0.00 %                      | 7.00 %                   |

Cumulative 3 year export potential for  
CDN products in this sector/subsector: 0-1 \$M

| Major Competing Countries | Market Share |
|---------------------------|--------------|
| FRANCE                    | 65.00 %      |
| GERMANY WEST              | 15.00 %      |
| NETHERLANDS               | 10.00 %      |
| OTHER COUNTRIES           | 10.00 %      |

Current Status of Canadian  
exports in this sector/subsector: No export results to date

Products/services for which there are good market prospects:

1. Eqpt. de stockage & conservation
2. Eqpt. d'emballage
3. Eqpt. de transformation des aliments

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- PEMD support
- Provincial export promotion
- CIDA programs
- Willingness of exporters to invest/joint venture in territory

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ABIDJAN

Market: IVORY COAST

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Non-competitive financing
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored
- \_\_\_\_\_
- \_\_\_\_\_

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: Nouveau secteur de promotion  
Expected Results: Obtenir soumiss. par au moins une soc. cdn pr chaque phase

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

Activity: Identification de projets/décideurs  
Expected Results: Générer intérêt de 3-4 fournis. à tirer partie de débouchés.

Activity: Recherche de partenaire privé pour implantation de joint-venture.  
Expected Results: Implantation d'au moins 1 co-entreprise.

Activity: Recherche de moyens de promotion d'expertise Cdn.  
Expected Results: Meilleure connaissance de notre compétence.

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ABIDJAN

Market: IVORY COAST

Projects or portions of major projects within this sector/sub-sector s  
in the planning stage which provide opportunities for Canadian suppliers:

|  |                    |                                      |
|--|--------------------|--------------------------------------|
| Prêt d'ajustement structurel                               | Approximate Value: | 150 M\$                              |
|  | Financing Source : | IBRD - World Bank                    |
|  | Contact :          |                                      |
| Programme d'installation des<br>jeunes en milieu rural/GVC | Approximate Value: | 8 M\$                                |
|  | Financing Source : | SFD - Saudi Fund for Developmt       |
|  | Contact :          |                                      |
| Projets dans secteur Agricul-<br>ture                      | Approximate Value: | 0 M\$                                |
|  | Financing Source : | AFDB - African Devlpmt Bank          |
|  | Contact :          | Pipeline des projets de la<br>Banque |

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ABIDJAN

Market: IVORY COAST

Sector : ADVANCED TECH. PROD. &amp; SERV

Sub-Sector: TELECOM, DATACOM, SAT, SPACECOM

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 0.00 \$M    | 5.00 \$M   | 10.00 \$M                   | 10.00 \$M                |
| Canadian Exports            | 0.00 \$M    | 0.00 \$M   | 1.00 \$M                    | 1.50 \$M                 |
| Canadian Share<br>of Market | 0.00 %      | 0.00 %     | 10.00 %                     | 10.50 %                  |

Cumulative 3 year export potential for  
CDN products in this sector/subsector: 1-3 \$M

## Major Competing Countries

## Market Share

|             |         |
|-------------|---------|
| FRANCE      | 90.00 % |
| SWITZERLAND | 10.00 % |

Current Status of Canadian  
exports in this sector/subsector: Small but expanding

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

1. Sta'ns pr radio de téléphone rurale par transmi'n
2. Central téléphonique
3. Pièces de rechange/formation d'équipe de mainten.
4. Unité mobile de radio-téléphone.

## Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Trade Fair activity
- CIDA programs
- Canada is one of few sources of supply
- Strong sectoral capability in Canada

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ABIDJAN

Market: IVORY COAST

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Non-competitive financing
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored
- Performance of local agent or representative
- Choix de rep. local reconnu dans le
- milieu pour service apres-vente.

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: Etude du Plan National des Télécom.

Expected Results: Ident'n des besoins en eqpt calendrier d'instal'n de système

Activity: Evaluation du suivi de participation ivoirienne au séminaire Temic Sept 11-29/89.

Expected Results: Renforcer influence cdn auprès des décideurs locaux.

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

Activity: Appuyer positionnement de soc. cdn auprès décideurs pour station terrestre de télécom.

Expected Results: Vente d'eqpt/service en télédétection.

Activity: Projection de cassettes video sur expertise Cdn dans le secteur.

Expected Results: Promotion de compétence Cdn.

Activity: Mission exploratoire d'experts en télécom.

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ABIDJAN

Market: IVORY COAST

Projects or portions of major projects within this sector/sub-sector s  
in the planning stage which provide opportunities for Canadian suppliers:

|                             |                    |       |
|-----------------------------|--------------------|-------|
| Programme de dév. du réseau | Approximate Value: | 5 M\$ |
| télécom (urbain/rural)      | Financing Source : |       |
|                             | Contact :          |       |

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ABIDJAN

Market: IVORY COAST

Sector : ADVANCED TECH. PROD. &amp; SERV

Sub-Sector: COMPUTERS HARD/SOFTWARE &amp; COMP

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 12.00 \$M   | 13.00 \$M  | 15.00 \$M                   | 15.00 \$M                |
| Canadian Exports            | 0.00 \$M    | 0.00 \$M   | 0.00 \$M                    | 0.00 \$M                 |
| Canadian Share<br>of Market | 0.00 %      | 0.00 %     | 0.00 %                      | 0.00 %                   |

Cumulative 3 year export potential for  
CDN products in this sector/subsector: 1-3 \$M

Major Competing Countries Market Share

|                          |         |
|--------------------------|---------|
| UNITED STATES OF AMERICA | 35.00 % |
| FRANCE                   | 30.00 % |
| JAPAN                    | 20.00 % |
| OTHER COUNTRIES          | 15.00 % |

Current Status of Canadian  
exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. Logiciels
2. Service de gestion/formation
3. Micro-ordinateurs

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Trade Fair activity
- Provincial export promotion
- CIDA programs
- Strong sectoral capability in Canada
- Willingness of exporters to invest/joint venture in territory



RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ABIDJAN

Market: IVORY COAST

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Non-competitive financing
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored
- Difficulté financière des clients
- locaux.

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

- Activity: Programme des suivis des contacts dans cadre de participation aux 5ième Journées Africaines de l'Informatique à term.  
Expected Results: Vente de logiciels de gestion municipale/gestion d'entretien
- Activity: Projet d'usine d'assemblage d'ordinateurs  
Expected Results: Implantation de co-entreprise locale
- Activity: Explorer possibilité de stage d'experts au SGI.  
Expected Results: Mieux nous positionner sur liste de fournisseurs futurs.

For the next fiscal year, the mission will carry out the following approved fairs and missions:

- Activity: Participation d'acheteurs/utilisateurs ivoiriens au SIIM.  
Expected Results: Promotion de expertise Cdn auprès décideurs/acheteurs locaux
- Activity: Participation aux 7ièm J.A.I.  
Expected Results: Renforcer présence Cdn dans le secteur.

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ABIDJAN

Market: IVORY COAST

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

Activity:                   Projet d'infomatization du secteur minier/création de banque de données géologiques.  
 Expected Results: Vente de logiciel/meilleur positionnement de consultants

Projects or portions of major projects within                   this sector/sub-sector s  
 in the planning stage which provide opportunities for Canadian suppliers:

|   |                    |        |
|---|--------------------|--------|
| Informatisation scolaire nationale.                         | Approximate Value: | 80 M\$ |
|   | Financing Source : |        |
|   | Contact :          |        |
| Informatisation des gestion des municipalités (proj.pilote) | Approximate Value: | 7 M\$  |
|   | Financing Source : |        |
|   | Contact :          |        |
| Informatisation de gestion admin/financière des agents      | Approximate Value: | 25 M\$ |
|   | Financing Source : |        |
|   | Contact :          |        |

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## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ABIDJAN

Market: IVORY COAST

Sector : POWER &amp; ENERGY EQUIP. &amp; SERV.

Sub-Sector: TRANSMISSION

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 120.00 \$M  | 120.00 \$M | 130.00 \$M                  | 0.00 \$M                 |
| Canadian Exports            | 4.00 \$M    | 2.20 \$M   | 4.00 \$M                    | 0.00 \$M                 |
| Canadian Share<br>of Market | 3.30 %      | 1.80 %     | 3.00 %                      | 0.00 %                   |

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

Major Competing Countries

Market Share

|                 |         |
|-----------------|---------|
| FRANCE          | 80.00 % |
| OTHER COUNTRIES | 20.00 % |

Products/services for which there are good market prospects:

1. Eqpt. de transmis./distri'n/convertis. de phase
2. Services de consultant en formation et gestion

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Provincial export promotion
- CIDA programs
- Strong sectoral capability in Canada

Factors for Canadian exports not reaching market potential:

- Performance of local agent or representative
- Absence d'agent local; manque de
- financement local/influence franc.

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ABIDJAN

Market: IVORY COAST

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: Etude du plan énergétique national qui sera réactualisé  
Expected Results: Ident'n des secteurs d'intervention possible bp fournisseurs

Activity: Revision des études d'avant-projet & documents d'appel  
d'offres relatifs à construction du barrage de soubre.  
Expected Results: Mieux ns positionner pr le dev. futur de ce projet.

Activity: Suivi du programme d'aide de l'ACDI à l'ECCI  
Expected Results: Evaluer retombées commerciales futures au prog. pr soc. Cdn

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

Activity: Suivi du plan de restructuration de EEI par DCGTX  
Expected Results: Ident'n des nouveaux pôles d'influence pr prise de décisions



RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ABIDJAN

Market: IVORY COAST

Sector : FOREST PRODUCTS, EQUIP, SERVICES

Sub-Sector: EQUIPMENT AND MACHINERY

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 3.20 \$M    | 3.00 \$M   | 3.50 \$M                    | 3.50 \$M                 |
| Canadian Exports            | 0.20 \$M    | 0.20 \$M   | 0.30 \$M                    | 1.00 \$M                 |
| Canadian Share<br>of Market | 6.80 %      | 6.60 %     | 8.50 %                      | 28.50 %                  |

Cumulative 3 year export potential for  
CDN products in this sector/subsector: 1-3 \$M

| Major Competing Countries | Market Share |
|---------------------------|--------------|
| ITALY                     | 30.00 %      |
| GERMANY WEST              | 25.00 %      |
| FRANCE                    | 20.00 %      |
| OTHER COUNTRIES           | 25.00 %      |

Current Status of Canadian  
exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. Unité mobile de scierie
2. Services-conseils
3. Production de semis pour reboisement

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Provincial export promotion
- CIDA programs
- Competitive pricing
- Strong sectoral capability in Canada
- Willingness of exporters to invest/joint venture in territory

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ABIDJAN

Market: IVORY COAST

Factors for Canadian exports not reaching market potential:

- Non-competitive financing
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored
- Performance of local agent or representative
- Choix de bon rep. local & absence
- de financement Cdn.

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

- Activity: Recherche du Plan National de reboisement et projets de création de coop forestière.  
Expected Results: Identification des besoins pour meilleur ciblage par soc.cdn
- Activity: Recherche du calendrier d'exécution de projets de reproduction de semis & gestion forestière.  
Expected Results: Assister soc. Cdn dans octroi de contrats.

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

- Activity: Mission exploratoire de producteurs de petit eqpt d'exportation forestier  
Expected Results: Sensibiliser utilisateur des avantages de eqpt/expertise Cdn

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ABIDJAN

Market: IVORY COAST

Projects or portions of major projects within this sector/sub-sector  
in the planning stage which provide opportunities for Canadian suppliers:

Prêt d'ajustement structurel

Approximate Value: 60 M\$  
Financing Source : IBRD - World Bank  
Contact :

Projet Forestier (Liberal)

Approximate Value: 14 M\$  
Financing Source : AFDB - African Devlpmt Bank  
Contact :



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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission:

Country:

The mission has proposed the following activities for the next fiscal year:

investment promotion

Seq #

Date

Type:

0/

Location:

Invest Nature:

Sector:

Cooperants:

Estimated Budget: \$ .0

## DEPARTMENT OF EXTERNAL AFFAIRS

PEMD - Proposed Government Promotional Activities 1990/91

Proposals As Of December 23/89

Post: Abidjan

| <u>Start Date</u> | <u>Event Name, Location &amp; Type</u>                                       | <u>Sector/Contact</u>               |
|-------------------|--|-------------------------------------|
| 91/02/00          | 7th Annual African Computer Days, Abidjan, Ivory Coast Fair , National Stand | Advanced Tech., Products & Services |

RPTB1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 TRADE AND ECONOMIC OVERVIEW

Mission: ALGIERS

Country: ALGERIA

L'Algérie s'est engagée sur la voie de réformes politiques et économiques importantes. Depuis quelques années, les autorités algériennes ont réalisé qu'une réforme drastique de tout le système économique était nécessaire et urgente. La mise en application d'un plan de réforme transformant les sociétés d'Etat en Entreprises publiques économiques (EPE) ayant une autonomie de gestion et d'opération totale, une loi à venir sur la création de sociétés mixtes et la reconnaissance de l'importance du secteur privé dans le développement économique du pays donneront à l'Algérie des outils nouveaux pour sortir de son marasme économique à condition naturellement que l'exécution soit à la hauteur des intentions.

S'appuyant sur cette restructuration, le nouveau gouvernement a donc proposé un programme d'action économique basé sur (1) l'assainissement des instruments de gestion monétaire et financière; c'est-à-dire lutte contre l'inflation et les déficits publics, recherche de solutions au lourd problème de l'endettement extérieur (cependant pas de rééchelonnement), établissement d'une politique des prix qui tient compte du marché et des pressions sociales, réforme fiscale, etc...et (2) sur une relance économique axée sur la décentralisation de l'économie et la libéralisation des activités commerciales qui non seulement accéléreront et assainiront les prises de décision, mais inspireront confiance à l'investissement étranger soit par la formation de sociétés mixtes ou par des projets d'intégration.

Pétrole et gas demeureront l'unique source importante (96%) de devises étrangères et la mobilisation maximale de ce secteur se traduira par des dépenses de plus de \$20 milliards au cours des dix prochaines années. Comptant l'importance des infrastructures dans le développement économique, les secteurs du transport, des télécommunications et de l'hydraulique continueront de recevoir une attention toute particulière dans la distribution des budgets de l'Etat. Le secteur agricole, ayant passé à travers une période de ré-organisation devrait s'améliorer progressivement, mais pas au point où d'importantes importations de produits agricoles ne seront pas nécessaires. La performance et le développement du secteur industriel entraîneront également le besoin de services d'engineering extérieurs.

Le succès du programme ambitieux de re-structuration sera tributaire de plusieurs facteurs dont quelques-uns échappent au contrôle de l'Algérie. Par exemple, la conjoncture économique mondiale affectera le niveau des changes, le coût des équipements étrangers et des denrées alimentaires, les taux d'intérêts et surtout le prix des hydrocarbures. Avec une majorité des entreprises nationales opérant bien en deça de leur capacité (par faute de devises nécessaires pour les importations), il relèvera du défi d'atteindre la croissance prévue de 4,5% pour l'économie algérienne en 1989. Si aucun changement politique ne survient au cours de la prochaine année, que le prix du pétrole se maintient au niveau actuel ou augmente et que "les directeurs généraux des EPE utilisent à bon escient leur nouvelle autorité", il y a bon espoir de voir l'Algérie traverser avec succès la phase actuelle de transition, car les politiques économiques et monétaires du pays sont maintenant bien orientées. Dès 1991, le pays devrait être soulagé des pressions qui se font sentir actuellement sur sa balance des comptes extérieurs.

RPTB1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 TRADE AND ECONOMIC OVERVIEW

Mission: ALGIERS

Country: ALGERIA

La mission identifie cinq secteurs prioritaires au niveau de la promotion commerciale: les transports, le pétrole et gas, la haute technologie (particulièrement les télécommunications), l'agriculture (y compris le bois), et finalement l'éducation et la santé.

Dans certains de ces secteurs (agriculture, transport, pétrole et gas) nous avons connu de bons succès et le marché se développe de façon très satisfaisante pour les sociétés canadiennes. D'autres secteurs (télécoms, éducation) où les sociétés canadiennes sont à la pointe de la technologie offrent un solide potentiel. Il ne dépendra que de la volonté des sociétés canadiennes de réagir positivement (et rapidement) aux ouvertures qui se présentent et aux organismes financiers canadiens d'offrir les fonds et conditions nécessaires à l'établissement d'une présence canadienne concurrentielle en Algérie.

RPTB2

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 EXPORT PROMOTION PRIORITIES

Mission: ALGIERS

Country: ALGERIA

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

1. TRANSPORT SYS, EQUIP, COMP, SERV.  
Ferroviaire: avec remise en état de tout le système et matériel roulant au cours des prochaines années, SNTF investira plus de \$500 millions. La technologie cdne est connue et appréciée. Aéronautique: investissements importants prévus prééquipement aéroportuaire. Urbain: métro toujours d'actualité et offre potentiel à court terme préconsultants.
2. OIL & GAS EQUIPMENT, SERVICES  
96% des revenus algns proviennent de ce secteur. Aussi, la forte demande algne en équipements et pièces se maintiendra à l'avenir. Par ailleurs, les entreprises publiques économiques (EPE) oeuvrant ds ce secteur sont normalement plus rentables et ont souvent plus facilement accès aux sources de financement mises à leur disposition.
3. ADVANCED TECH. PROD. & SERV  
Télécoms: Modernisation et expansion du système de commutation exigera minimum de 200,000 lignes par année. Algérie toujours à la recherche d'un deuxième fournisseur. Téléphonie rurale, transmissions de données par paquets, PABX, fibres optiques avec normes adéquates offrent très bon potentiel pr sociétés persévérantes et offrant prix concurrentiels
4. AGRI & FOOD PRODUCTS & SERVICE  
Algérie dépense 23% de son budget annuel pr importation de denrées alimentaires et produits de base. Ns sommes déjà partenaire important ds le secteur du blé. Marché substantiel ds secteur légumes secs (haricots et lentilles) pas exploité à fond par le Canada. Bois: Marché est mature mais nécessitant financement continu.
5. EDUCATION, MEDICAL, HEALTH PROD  
Education: Secteur de développement prioritaire dû à forte croissance démographique qui nécessitera des investissements substatiels en équipements pédagogiques. Santé: Marché évalué à plus de \$500 millions en produits et équipements pharmaceutiques. Possibilités de fabrication locale existent nécessitant financement et apport de capitaux.
6. I

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

- 1.
- 2.
- 3.

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ALGIERS

Market: ALGERIA

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

Sub-Sector: ANIMAL, POULTRY BREEDING STOCK

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 650.00 \$M  | 600.00 \$M | 600.00 \$M                  | 650.00 \$M               |
| Canadian Exports            | 25.00 \$M   | 26.00 \$M  | 40.00 \$M                   | 50.00 \$M                |
| Canadian Share<br>of Market | 3.80 %      | 4.30 %     | 6.40 %                      | 7.70 %                   |

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

| Major Competing Countries | Market Share |
|---------------------------|--------------|
| UNITED STATES OF AMERICA  | 28.00 %      |
| FRANCE                    | 23.40 %      |
| NETHERLANDS               | 18.70 %      |
| GERMANY WEST              | 9.40 %       |
| ENGLAND                   | 12.20 %      |
| SWITZERLAND               | 1.90 %       |

Current Status of Canadian  
exports in this sector/subsector: Well established and growing

Products/services for which there are good market prospects:

1. Lait en poudre
2. Peaux et cuirs
3. Suif
4. Oeuf de dindons
5. Couvoirs à oeufs
6. Pommes de terre de semence
7. Huile de canola
8. Vaches laitières
9. Tabac
10. Machinerie agricole (petit outillage)
11. Produits vétérinaires
12. Irradiateur

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ALGIERS

Market: ALGERIA

## Factors contributing to current successful Canadian exports:

- Aggressive marketing
- PEMD support
- Fairs and Missions support
- CIDA programs
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- Competitive Canadian financing

## Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Restrictive standards
- Non-competitive pricing
- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- Competition CEE
- Canada face competition
- CEE/U.S.A.

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: Continuer les consultations des exportateurs de pomme de terre de semence, vaches laitières, produits vétérinaires, huiles  
Expected Results: Obtenir de nouveaux marchés

For the next fiscal year, the mission will carry out the following approved fairs and missions:

Activity: Foire Internationale d'Alger  
Expected Results: Familiarisation avec produits et services cdns

Activity: Western Canada Farm Progress Show  
Expected Results: Familiarisation avec produits et services cdns

Activity: Royal Ontario Winter Fair  
Expected Results: Familiarisation avec produits et services canadiens

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ALGIERS

Market: ALGERIA

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

Activity: Mission et seminaire technique pomme de terre  
Expected Results: Repénétration du marché

Activity: Revoir programme de GOV'T cdn pour garantir qualité du produit à l'ère expédition oeufs dindes  
Expected Results: Comparer niveau d'éclosion et fertilité

Activity: Foire spécialisée agricole  
Expected Results: Pénétration de nouveaux marchés

Activity: Foire Internationale Agricole  
Expected Results: Pénétration du marché



RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ALGIERS

Market: ALGERIA

Projects or portions of major projects within this sector/sub-sector s  
in the planning stage which provide opportunities for Canadian suppliers:

AOI INTERNATIONAL

Approximate Value: 0 M\$

Financing Source :

Contact : Daniel J. Kane

Machinerie agricole

Approximate Value: 220 M\$

Financing Source : IBRD - World Bank

AFDB - African Devlpmt Bank

OTHER

Contact : Daniel J. Kane

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ALGIERS

Market: ALGERIA

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

Sub-Sector: SEEDS &amp; SPECIAL CROPS

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 76.00 \$M   | 85.00 \$M  | 100.00 \$M                  | 120.00 \$M               |
| Canadian Exports            | 6.00 \$M    | 0.00 \$M   | 6.00 \$M                    | 20.00 \$M                |
| Canadian Share<br>of Market | 8.00 %      | 0.00 %     | 6.00 %                      | 16.60 %                  |

Cumulative 3 year export potential for  
CDN products in this sector/subsector: 15-30 \$M

| Major Competing Countries | Market Share |
|---------------------------|--------------|
| TURKEY                    | 28.20 %      |
| UNITED STATES OF AMERICA  | 51.70 %      |
| FRANCE                    | 4.70 %       |
| SPAIN                     | 4.70 %       |
| NETHERLANDS               | 4.70 %       |

Current Status of Canadian  
exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. Lentilles
2. Petit haricot blanc
3. Haricot Great Northern

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Trade Fair activity
- CIDA programs
- Competitive pricing
- Canada is one of few sources of supply
- Bilateral economic trade agreement

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ALGIERS

Market: ALGERIA

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored
- \_\_\_\_\_
- \_\_\_\_\_

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: Suivi visite OAIC au Canada  
Expected Results: Maintenir présence

Activity: Visite Ontario Bean Marketing Board en Algérie  
Expected Results: Maintenir présence

Activity: Suivi visite Western Canada Pulse Growers en Algérie  
Expected Results: Maintenir présence

For the next fiscal year, the mission will carry out the following approved fairs and missions:

Activity: Foire Internationale d'Alger  
Expected Results: Pénétrer le marché

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

Activity: Foire Internationale Agricole  
Expected Results: Pénétrer le marché

Activity: Mission au Canada: secteur des légumes secs  
Expected Results: Augmentation de notre part du marché

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ALGIERS

Market: ALGERIA

Projects or portions of major projects within this sector/sub-sector s  
in the planning stage which provide opportunities for Canadian suppliers:

Les AOI et consultations

Approximate Value: 0 M\$

Financing Source :

Contact : Daniel J. Kane

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ALGIERS

Market: ALGERIA

Sector : GRAINS AND OILSEEDS

Sub-Sector: ALL SUB-SECTORS

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 527.00 \$M  | 454.00 \$M | 480.00 \$M                  | 500.00 \$M               |
| Canadian Exports            | 127.00 \$M  | 190.00 \$M | 150.00 \$M                  | 160.00 \$M               |
| Canadian Share<br>of Market | 24.10 %     | 41.90 %    | 31.30 %                     | 32.00 %                  |

Cumulative 3 year export potential for  
CDN products in this sector/subsector: 100+ \$M

## Major Competing Countries

## Market Share

|                          |         |
|--------------------------|---------|
| UNITED STATES OF AMERICA | 51.00 % |
| FRANCE                   | 6.20 %  |
| ITALY                    | 7.40 %  |

Current Status of Canadian  
exports in this sector/subsector: Mature with little growth

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

1. Blé dur (Duram)
2. Orge
3. Autre blé et farine
4. Equipement de conditionnement de semence/céréales

## Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- Bilateral economic trade agreement
- Competitive Canadian financing

## Factors for Canadian exports not reaching market potential:

- Equipement de conditionnement
- de semence demande plus d'attention

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ALGIERS

Market: ALGERIA

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: visite périodique en Algérie du Canadian Wheat Board  
Expected Results: Maintenir présence

Activity: Visite en Algérie de fournisseurs équipements  
Expected Results: Maintenir présence

For the next fiscal year, the mission will carry out the following approved fairs and missions:

Activity: Foire Internationale d'Alger  
Expected Results: Manifestation d'intérêt face au marché algn

Activity: Deux reps de l'OAIC au cours annuel de CIGI  
Expected Results: Echange de transfert technologique

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

Activity: Visite en Algérie du Ministre Canadien de l'Agriculture  
Expected Results: Maintenir intérêt

Activity: Visite au Canada de l'OAIC  
Expected Results: Maintenir le marché

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ALGIERS

Market: ALGERIA

Projects or portions of major projects within this sector/sub-sector s  
in the planning stage which provide opportunities for Canadian suppliers:

Selon AOI et consultations res Approximate Value: 0 M\$  
treintes Financing Source :  
Contact : Daniel J. Kane

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ALGIERS

Market: ALGERIA

Sector : ADVANCED TECH. PROD. &amp; SERV

Sub-Sector: ALL SUB-SECTORS

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 500.00 \$M  | 450.00 \$M | 450.00 \$M                  | 500.00 \$M               |
| Canadian Exports            | 10.00 \$M   | 8.00 \$M   | 6.00 \$M                    | 25.00 \$M                |
| Canadian Share<br>of Market | 2.00 %      | 1.70 %     | 1.40 %                      | 5.00 %                   |

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

## Major Competing Countries

## Market Share

|                          |         |
|--------------------------|---------|
| JAPAN                    | 25.00 % |
| SWEDEN                   | 15.00 % |
| FRANCE                   | 12.00 % |
| UNITED STATES OF AMERICA | 10.00 % |
| GERMANY WEST             | 10.00 % |

## Current Status of Canadian

exports in this sector/subsector: Small but expanding

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

1. Equipement de commutation numérique
2. Systèmes de téléphonie rurale
3. Equipement de transmission (données et voix)
4. Réseaux de traitement de données par paquets
5. Equipement de radio-diffusion
6. Téléphonie cellulaire
7. Services/formation en télécommunications
8. Câbles de télécommunications
9. Logiciels informatiques francophones
10. Logiciels arabes/latins
11. Equipement et services informatiques



RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ALGIERS

Market: ALGERIA

## Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- CIDA programs
- Strong sectoral capability in Canada
- Competitive Canadian financing
- Willingness of exporters to invest/joint venture in territory
- Volonte d'ajuster normes
- Flexibilite et ouverture
- cdnes aux normes locales.

## Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Manque de flexibilit
- L'usage du Franais problmatique

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: Appui a BCI\Northern telecom pour devenir deuxieme fournis-  
seur au niveau de la commutation

Expected Results: Reconnaissance du Canada comme deuxieme fournisseur

Activity: Transfert technologique pour fabrication locale du SL-1

Expected Results: Penetration du marche et exportations vers Maghreb

Activity: Etudier possibilites d'assemblage local pour ordinateurs

Expected Results: Meilleure penetration du marche

Activity: Presentation du DMS

Expected Results: Meilleure penetration du marche

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ALGIERS

Market: ALGERIA

For the next fiscal year, the mission will carry out the following approved fairs and missions:

Activity: Foire International d'Alger  
Expected Results: Manifestation d'intérêt au marché algérien

Activity: Salon International Informatique de Montréal  
Expected Results: Familiarisation avec capacités cdnes (Hardware et software)

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

Activity: Présentation des services informatiques offerts par BCI  
Expected Results: Assistance au MPTA pour la gestion informatique

Activity: Salon Informatique et télécoms  
Expected Results: Familiarisation avec produits et services cdns

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ALGIERS

Market: ALGERIA

Projects or portions of major projects within this sector/sub-sector s  
in the planning stage which provide opportunities for Canadian suppliers:

Selon les appels d'offres

Approximate Value:

0 M\$

Financing Source : EDC - Export Dev Corporation

Contact

: Jacques H. Desjardins

Abdelkader Zehani

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ALGIERS

Market: ALGERIA

Sector : TRANSPORT SYS, EQUIP, COMP, SERV.

Sub-Sector: RAIL

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 125.00 \$M  | 130.00 \$M | 120.00 \$M                  | 450.00 \$M               |
| Canadian Exports            | 1.50 \$M    | 1.50 \$M   | 10.00 \$M                   | 100.00 \$M               |
| Canadian Share<br>of Market | 1.20 %      | 1.20 %     | 8.30 %                      | 22.20 %                  |

Cumulative 3 year export potential for  
CDN products in this sector/subsector: 100+ \$M

## Major Competing Countries

## Market Share

|              |         |
|--------------|---------|
| AUSTRIA      | 36.70 % |
| FRANCE       | 36.70 % |
| GERMANY WEST | 4.60 %  |
| COMECON      | 4.60 %  |

Current Status of Canadian  
exports in this sector/subsector: Well established and growing

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

1. Locomotives
2. Voitures de banlieu
3. Voies
4. Signalisation
5. Télécommunication et informatique
6. Formation et services
7. Entretien de voies ferrées
8. Equipement d'aiguillage
9. Voiture de voyage internationale

## Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Provincial export promotion
- CIDA programs
- Competitive pricing
- Strong sectoral capability in Canada
- Competitive Canadian financing

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ALGIERS

Market: ALGERIA

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Performance of local agent or representative
- \_\_\_\_\_
- \_\_\_\_\_

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: Mission ferroviaire en Algérie  
Expected Results: Persuader Algns de la compétence et compétition cdnes

Activity: Continuer promotion secteur ferroviaire: locomotives, voitures rails et autres  
Expected Results: Diversification de nos ventes secteur ferroviaire en Algérie

For the next fiscal year, the mission will carry out the following approved fairs and missions:

Activity: Foire Internationale d'Alger  
Expected Results: Manifestation d'intérêt au marché algérien

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

Activity: Journées techniques en Algérie secteur ferroviaire  
Expected Results: Démontrer qualité des produits et services cdns

Activity: Mission technique en Algérie / secteur ferroviaire  
Expected Results: Augmentation, diversification ventes cdnes dans ce secteur

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ALGIERS

Market: ALGERIA

Projects or portions of major projects within this sector/sub-sector s  
in the planning stage which provide opportunities for Canadian suppliers:

Equipement ferroviaire

Approximate Value: 450 M\$

Financing Source : IBRD - World Bank

OTHER

Contact

: Daniel J. Kane

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ALGIERS

Market: ALGERIA

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: AEROSPACE

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 280.00 \$M  | 250.00 \$M | 200.00 \$M                  | 250.00 \$M               |
| Canadian Exports            | 10.00 \$M   | 10.00 \$M  | 10.00 \$M                   | 15.00 \$M                |
| Canadian Share<br>of Market | 3.40 %      | 4.00 %     | 5.00 %                      | 6.00 %                   |

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

## Major Competing Countries

## Market Share

|                          |         |
|--------------------------|---------|
| UNITED STATES OF AMERICA | 35.00 % |
| FRANCE                   | 30.00 % |
| EUROPEAN COMMON MARKET C | 20.00 % |

Current Status of Canadian  
exports in this sector/subsector: Small but expanding

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

1. Révision/réparation de moteurs
2. Equipement pour centre de contrôle circ. aérienne
3. Equipement MLS (micro-wave landing systems)
4. Hélicoptères
5. Avions
6. Services/formation
7. Véhicules d'entretien et de maintenance

## Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Fairs and Missions support
- Competitive pricing
- Strong sectoral capability in Canada
- Competitive Canadian financing
- Willingness of exporters to invest/joint venture in territory
- Persévérance, patience et

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ALGIERS

Market: ALGERIA

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Manque de flexibilité pour
- s'adapter aux conditions locales

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: Planification de la circulation aérienne  
Expected Results: Orienter exportateurs sur potentialités suite aux études

For the next fiscal year, the mission will carry out the following approved fairs and missions:

Activity: Foire Internationale d'Alger  
Expected Results: Manifestation d'intérêt au marché algn

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

Activity: Séminaire/journées techniques  
Expected Results: Relancer coopération dans secteur aéronautique

Activity: Présentation/démonstration Bell Helicopters  
Expected Results: Meilleure pénétration du marché

Activity: Présentation/démonstration du Dash 8  
Expected Results: Réalisation des premières ventes sur marché algn



RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ALGIERS

Market: ALGERIA

Projects or portions of major projects within this sector/sub-sector s  
in the planning stage which provide opportunities for Canadian suppliers:

Base maintenance d'Air Algérie Approximate Value: 60 M\$  
Financing Source : AFDB - African Devlpmt Bank  
Contact : Jacques H. Desjardins

Selon les AOI Approximate Value: 0 M\$  
Financing Source :  
Contact : Jacques H. Desjardins  
Abdelkader Zehani

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ALGIERS

Market: ALGERIA

Sector : FOREST PRODUCTS, EQUIP, SERVICES

Sub-Sector: WOOD AND WOOD PRODUCTS

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 185.00 \$M  | 190.00 \$M | 200.00 \$M                  | 225.00 \$M               |
| Canadian Exports            | 16.00 \$M   | 40.00 \$M  | 80.00 \$M                   | 100.00 \$M               |
| Canadian Share<br>of Market | 8.60 %      | 21.10 %    | 40.00 %                     | 44.40 %                  |

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

## Major Competing Countries

## Market Share

|            |         |
|------------|---------|
| FINLAND    | 28.00 % |
| AUSTRIA    | 12.00 % |
| SWEDEN     | 8.00 %  |
| INDONESIA  | 5.00 %  |
| YUGOSLAVIA | 5.00 %  |

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

1. Bois d'oeuvre résineux
2. Contre-plaque
3. Autres demi-produits en bois

## Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Trade Fair activity
- Provincial export promotion
- Competitive pricing
- Strong sectoral capability in Canada
- Competitive Canadian financing

## Factors for Canadian exports not reaching market potential:

- Market prospects have not been adequately explored
- bois de l'Est du cda a difficulté
- de pénétrer le marché

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ALGIERS

Market: ALGERIA

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: Visite en Algérie de sociétés cdnnes  
Expected Results: Maintenir présence

For the next fiscal year, the mission will carry out the following approved fairs and missions:

Activity: Visite au Canada des 3 importateurs  
Expected Results: Développer nouveaux marchés

Projects or portions of major projects within this sector/sub-sector s in the planning stage which provide opportunities for Canadian suppliers:

AOI INTERNATIONAUX

Approximate Value: 0 M\$  
Financing Source :  
Contact : Daniel J. Kane

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ALGIERS

Market: ALGERIA

Sector : FOREST PRODUCTS, EQUIP, SERVICES

Sub-Sector: PULP AND PAPER PRODUCTS

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 25.00 \$M   | 30.00 \$M  | 45.00 \$M                   | 60.00 \$M                |
| Canadian Exports            | 2.00 \$M    | 1.20 \$M   | 4.00 \$M                    | 10.00 \$M                |
| Canadian Share<br>of Market | 8.00 %      | 4.00 %     | 8.90 %                      | 16.70 %                  |

Cumulative 3 year export potential for  
CDN products in this sector/subsector: 5-15 \$M

Major Competing Countries

Market Share

|         |         |
|---------|---------|
| SWEDEN  | 54.60 % |
| AUSTRIA | 31.90 % |
| EUROPE  | 4.60 %  |

Current Status of Canadian  
exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. Papier journal
2. Pate
3. Papier kraft
4. Papier carton

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Competitive pricing
- Strong sectoral capability in Canada
- Competitive Canadian financing

Factors for Canadian exports not reaching market potential:

- Limited Canadian capabilities
  - Market prospects have not been adequately explored
-

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ALGIERS

Market: ALGERIA

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: Visite périodique de sociétés cdnnes en Algérie  
Expected Results: Pénétrer le marché

For the next fiscal year, the mission will carry out the following approved fairs and missions:

Activity: Visite au Canada dans le secteur des importateurs algériens  
Expected Results: Marche croissant, augmenter partie du marché

Projects or portions of major projects within this sector/sub-sector s in the planning stage which provide opportunities for Canadian suppliers:

AOI INTERNATIONAL

Approximate Value: 0 M\$  
Financing Source :  
Contact : Daniel J. Kane

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ALGIERS

Market: ALGERIA

Sector : OIL &amp; GAS EQUIPMENT, SERVICES

Sub-Sector: MACHINERY AND EQUIPMENT

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 175.00 \$M  | 150.00 \$M | 150.00 \$M                  | 200.00 \$M               |
| Canadian Exports            | 5.00 \$M    | 7.00 \$M   | 10.00 \$M                   | 15.00 \$M                |
| Canadian Share<br>of Market | 2.80 %      | 4.70 %     | 6.70 %                      | 7.50 %                   |

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

| Major Competing Countries | Market Share |
|---------------------------|--------------|
| UNITED STATES OF AMERICA  | 30.00 %      |
| FRANCE                    | 25.00 %      |
| JAPAN                     | 20.00 %      |
| ITALY                     | 10.00 %      |

Current Status of Canadian  
exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. Equipement de puits
2. Equipement de forage
3. Séparateurs
4. Valves/packers
5. Equipement de pipeline
6. Equipement d'entretien de pipeline
7. Equipement de services aux puits
8. Générateurs/compresseurs
9. Camions et grues
10. Pièces de rechange pour camions

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ALGIERS

Market: ALGERIA

## Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Provincial export promotion
- Competitive pricing
- Competitive Canadian financing
- Willingness of exporters to invest/joint venture in territory
- Suivi continuel,

## Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Market prospects have not been adequately explored
- Absence de bureaux locaux
- pour assurer suivi continu

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: Journées techniques pétrole & gaz  
Expected Results: Identification potentiel pr transfert technologique

Activity: Visite de l'ambassade dans le sud algérien  
Expected Results: Obtention de consultations pour fournisseurs cdns

For the next fiscal year, the mission will carry out the following approved fairs and missions:

Activity: Foire Internationale d'Alger  
Expected Results: Introduction de nouveaux équipements canadiens sur marché

Activity: National Petroleum Show  
Expected Results: Familiarisation avec produits et services canadiens

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ALGIERS

Market: ALGERIA

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

Activity: Mission d'étude concernant l'ouverture d'un bureau de liaison à Alger pr les sociétés de l'Alberta

Expected Results: Suivi continu des dossiers et meilleure part du marché

Activity: Encourager sociétés cdnes intéressées par l'exploration

Expected Results: Meilleure pénétration cdne du secteur pr encourager ventes

Activity: Visite de l'ambassade dans le sud

Expected Results: Maintien des relations et obtention de consultations

Projects or portions of major projects within this sector/sub-sector s in the planning stage which provide opportunities for Canadian suppliers:

Pipeline Algérie/Maroc/Espagne Approximate Value: 2000 M\$  
 Financing Source : TO BE DETERMINED  
 Contact : Jacques H. Desjardins

Selon les appels d'offres Approximate Value: 0 M\$  
 Financing Source :  
 Contact : Jacques H. Desjardins  
 Abdelkader Zehani



RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ALGIERS

Market: ALGERIA

Sector : EDUCATION, MEDICAL, HEALTH PROD

Sub-Sector: HOSP. &amp; MEDICAL EQUIP, INSTRUM.

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 300.00 \$M  | 400.00 \$M | 425.00 \$M                  | 450.00 \$M               |
| Canadian Exports            | 0.20 \$M    | 0.20 \$M   | 7.00 \$M                    | 10.00 \$M                |
| Canadian Share<br>of Market | 0.06 %      | 0.05 %     | 2.00 %                      | 2.50 %                   |

Cumulative 3 year export potential for  
CDN products in this sector/subsector: 5-15 \$M

| Major Competing Countries | Market Share |
|---------------------------|--------------|
| FRANCE                    | 60.00 %      |
| GERMANY WEST              | 20.00 %      |
| UNITED STATES OF AMERICA  | 10.00 %      |
| EUROPE                    | 2.50 %       |
| TURKEY                    | 2.50 %       |
| SWITZERLAND               | 5.00 %       |

Current Status of Canadian  
exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. Equipements pour traitement du cancer au cobalt
2. Equipements pour unités de dialyse
3. Equipements pour unités de Réanimation
4. Echographie
5. Valves cardiaques
6. Produits pharmaceutiques finis
7. Matière premières pour industries pharmaceutiques

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ALGIERS

Market: ALGERIA

## Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Provincial export promotion
- CIDA programs
- Competitive pricing
- Strong sectoral capability in Canada
- Competitive Canadian financing
- Willingness of exporters to invest/joint venture in territory
- Bonne représentation

## Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Manque d'agressivité
- \_\_\_\_\_

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: vente d'équipements et accessoires  
Expected Results: Ventes en hémodialyse et réanimation

Activity: Produits pharmaceutiques  
Expected Results: Participation à l'approvisionnement 90/92

Activity: Joint venture  
Expected Results: Entamer le sujet

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ALGIERS

Market: ALGERIA

For the next fiscal year, the mission will carry out the following approved fairs and missions:

Activity: Foire Internationale d'Alger  
Expected Results: Manifestation d'intérêt face au marché algn

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

Activity: Visite au Canada d'Algériens secteur santé pour produits pharmaceutiques et équipements  
Expected Results: Echange d'informations, connaitre potentiel cdn

Activity: Participation algne au Salon médical maghrébin  
Expected Results: Familiarisation avec produits et services cdns

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ALGIERS

Market: ALGERIA

Projects or portions of major projects within this sector/sub-sector s  
in the planning stage which provide opportunities for Canadian suppliers:

AOI INTERNATIONAL

Approximate Value: 0 M\$

Financing Source :

Contact : Daniel J. Kane/l. Benhacine

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ALGIERS

Market: ALGERIA

Sector : EDUCATION, MEDICAL, HEALTH PROD

Sub-Sector: EDUCATIONAL SERVICES, EQUIPMENT

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 150.00 \$M  | 200.00 \$M | 250.00 \$M                  | 300.00 \$M               |
| Canadian Exports            | 2.00 \$M    | 2.00 \$M   | 5.00 \$M                    | 30.00 \$M                |
| Canadian Share<br>of Market | 1.30 %      | 1.00 %     | 2.00 %                      | 10.00 %                  |

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

## Major Competing Countries

## Market Share

|                          |         |
|--------------------------|---------|
| FRANCE                   | 80.00 % |
| EUROPEAN COMMON MARKET C | 10.00 % |

## Current Status of Canadian

exports in this sector/subsector: Small but expanding

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

1. Matériel didactique: électricité
2. Matériel didactique: électronique
3. Matériel didactique: télécommunications
4. Ordinateurs/logiciels
5. Formation de formateurs
6. Equipement de laboratoire

## Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- CIDA programs
- Competitive pricing
- Strong sectoral capability in Canada
- Competitive Canadian financing
- Willingness of exporters to invest/joint venture in territory
- Suivi continuél, persévérance et patience. Utili-

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ALGIERS

Market: ALGERIA

Factors for Canadian exports not reaching market potential:

- Non-competitive financing
  - Bureau de liaison inexistant
  -
- 

For the next fiscal year, the mission will carry out the following approved fairs and missions:

Activity: Foire Internationale d'Alger  
Expected Results: Intérêt face au marché

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

Activity: Ouverture d'un bureau de liaison par fournisseur de matériel didactique

Expected Results: Suivi des dossiers avec client et service après-ventes

Activity: Transfert technologique au niveau de la fabrication d'équipements pédagogiques

Expected Results: Plus grande part du marché local et exportations en Afrique

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ALGIERS

Market: ALGERIA

Projects or portions of major projects within this sector/sub-sector s  
in the planning stage which provide opportunities for Canadian suppliers:

Equipements pour 60 centres de Approximate Value: 110 M\$  
formation Financing Source : IBRD - World Bank  
Contact : Jacques H. Desjardins  
Abdelkader Zehani

Equipements de labos pour les Approximate Value: 50 M\$  
universités Financing Source : EDC - Export Dev Corporation  
Contact : Jacques H. Desjardins  
Abdelkader Zehani

Selon les appels d'offres Approximate Value: 0 M\$  
Financing Source :  
Contact : Jacques H. Desjardins  
Abelkader Zehani

RPTB1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 TRADE AND ECONOMIC OVERVIEW

Mission: HARARE

Country: ZIMBABWE

ANGOLA: The peace process is still not firmly underway and until this occurs, economic development of this potentially rich country will be delayed. Meanwhile its' infrastructure continues to crumble under the effects of civil war. Joint efforts between the post and EDC resulted in sales of oil industry and related telecommunications equipment during 1988/89. Due to problems of distance and communications, post efforts will concentrate on utilizing the EDC line of credit to the petroleum sector. Canadian exports in 1988: \$3.98 million (cereal, beans, asbestos).

BOTSWANA: This large, sparsely populated (1.1 million) country is the only one in the post territory with significant reserves of foreign exchange, a convertible currency and no foreign exchange restrictions. Botswana's economy is, however, closely linked to South Africa through a customs and tariff union. Thus, trade opportunities for Canadian exports are limited not only by the miniscule size of the market but also because channels of distribution are almost exclusively through RSA. The post pursues opportunities funded by CIDA programs or multilateral projects. Canada is an important supplier of telecommunications equipment. Canadian exports in 1988: \$6.96 million (fats, geophysical exploration equipment).

MALAWI: 1988/89 was an improved year for this small, landlocked agricultural country. With World Bank balance of payment support, Malawi liberalised its economy by making foreign exchange available to import raw materials and spares for the productive sector. The opening of the rail link to the port of Nacala for transport of imports and exports will lessen Malawi's dependence on more expensive routes via South Africa. Canada is a major supplier of pharmaceuticals under a CIDA program. Post maintains a close watch on multilaterally funded projects in health, education, road developments, agriculture and power sectors. Canadian exports in 1988: \$1.47 million (pharmaceuticals, loco parts).

MOCAMBIQUE: Mocambique's economy continues to deteriorate under the combined impact of civil war and regional destabilization. Debt servicing obligations far exceed total imports and the country depends on the international donor community for survival. The post monitors opportunities in CIDA and multilaterally funded projects. A CIDA development line of credit is expected to be implemented in 1990. This will provide opportunities for a wider variety of Canadian goods. Canadian exports in 1988: \$20.5 million, mostly food aid.

ZAMBIA: Continuing strong copper prices during 1989 have helped the otherwise bleak economic situation in this country. Recent moves towards rapprochement with the IMF should result in multilaterally funded projects. Canadian exports in 1988: \$19.99 million (wheat, beans, telecom equipment).

ZIMBABWE: Following two good rainy seasons, Zimbabwe is in its second year of economic recovery. Continuing good prices for its major exports (tobacco, gold, nickel) have assisted the balance of payments situation. High levels of debt servicing mean that foreign exchange is tightly controlled and scarce. Lack of foreign exchange constitutes the main impediment to introducing new products to the Zimbabwe market. Post concentrates its efforts on major projects such as the sale of Dash 8 aircraft, construction of a pulp and paper mill, supply of locomotives plus other CIDA and multilaterally funded opportunities. Post is extensively invol-



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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: HARARE

Country: ZIMBABWE

ved in the thorough and effective utilisation of the private sector  
General Line of Credit. Canadian exports in 1988: \$25.6 million (sulphur,  
grain, telecom, machinery).

RPTB2

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 EXPORT PROMOTION PRIORITIES

Mission: HARARE

Country: ZIMBABWE

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

1. TRANSPORT SYS, EQUIP, COMP, SERV.  
National Railways of Zimbabwe have an immediate requirement for 30 locos and also for coaches in 8 year period. CIDA is involved with rail rehabilitation in Mocambique while Angolan and Malawi railways need rehabilitation and procurement of rolling stock -financing bring a major restraint. Continued contact being made/re DASH 8 aircraft.
2. POWER & ENERGY EQUIP. & SERV.  
Zimbabwe govt has given approval to Kariba South Hydro expansion & rehabilitation of old thermal power stations. Malawi has WB funding for hydro expansion with number of consulting opportunities.
3. ADVANCED TECH. PROD. & SERV  
Zimbabwe Posts & Telecommunications have carried out exercise to identify potential sources requirement for equipment & services. Anticipated that with availability of CIDA/EDC funding share of this market will increase.
4. MINE, METAL, MINERAL PROD & SRV  
Zimbabwe, Malawi & Mocambique governments have made mining developments high priority. There will be continued requirement for equipment and services.
5. FOREST PRODUCTS, EQUIP, SERVICES  
Zimbabwe government has given go ahead for new pulp paper plant. Combined Canadian/UK submission short listed with 2 Japanese companies. With EDC support strong possibility of Canadian involvement.
6. CHEM PROD & PETROCHEM, EQP, SERV  
Reesins & industrial chemicals are imported in large quantities by countries in this region. With CIDA financing sectors are aware of Canadian capabilities.

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

- |                                      |                                     |
|--------------------------------------|-------------------------------------|
| 1. TRANSPORT SYS, EQUIP, COMP, SERV. | 4. MINE, METAL, MINERAL PROD & SRV  |
| 2. GRAINS AND OILSEEDS               | 5. CHEM PROD & PETROCHEM, EQP, SERV |
| 3. ADVANCED TECH. PROD. & SERV       | 6.                                  |

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: HARARE

Market: ZIMBABWE

Sector : ADVANCED TECH. PROD. &amp; SERV

Sub-Sector: TELECOM, DATACOM, SAT, SPACECOM

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 59.00 \$M   | 63.00 \$M  | 72.00 \$M                   | 74.00 \$M                |
| Canadian Exports            | 0.10 \$M    | 0.56 \$M   | 2.00 \$M                    | 2.50 \$M                 |
| Canadian Share<br>of Market | 0.16 %      | 0.90 %     | 2.70 %                      | 3.30 %                   |

Cumulative 3 year export potential for  
CDN products in this sector/subsector: 5-15 \$M

## Major Competing Countries

## Market Share

|                |         |
|----------------|---------|
| UNITED KINGDOM | 40.00 % |
| GERMANY WEST   | 23.00 % |
| JAPAN          | 19.00 % |
| SOUTH AFRICA   | 14.00 % |

Current Status of Canadian  
exports in this sector/subsector: Small but expanding

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

1. Rural communication systems
2. PABX systems
3. Connector power line products
4. Hydro power equipment
5. Consulting & other services

## Factors contributing to current successful Canadian exports:

- Aggressive marketing
- CIDA programs
- Competitive pricing

## Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Non-competitive financing
- Foreign exchange
- limitations

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: HARARE

Market: ZIMBABWE

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: Zimbabwe postal authorities have been supplied with information on Cdn capabilities to supply prods srvcs for 5 yr plan  
Expected Results: With CIDA assistance & possible EDC larger share market.

Activity: Angola looking at developing radio telecom network. Harris Farinon Canada obtain contract with EDC financing.  
Expected Results: With EDC assistance larger share market.

Activity: Post monitoring developments in Malawi, Botswana, Zimbabwe & Angola re telecommunication rehabilitation & rural extension  
Expected Results: WB & ADB financed projects cld present further opps for Cda.

For the next fiscal year, the mission will carry out the following approved fairs and missions:

Activity: Zimbabwe International Trade Fair. April 1990. Looking at unclusion telecommunication products on stand.  
Expected Results: Increased sales.

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: HARARE

Market: ZIMBABWE

Sector : POWER &amp; ENERGY EQUIP. &amp; SERV.

Sub-Sector: ALL SUB-SECTORS

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 50.00 \$M   | 60.00 \$M  | 60.00 \$M                   | 65.00 \$M                |
| Canadian Exports            | 0.51 \$M    | 2.00 \$M   | 1.80 \$M                    | 2.30 \$M                 |
| Canadian Share<br>of Market | 1.00 %      | 3.30 %     | 3.00 %                      | 3.50 %                   |

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

## Major Competing Countries

## Market Share

|                |         |
|----------------|---------|
| UNITED KINGDOM | 30.00 % |
| JAPAN          | 24.00 % |
| GERMANY WEST   | 15.00 % |
| FRANCE         | 12.00 % |

Current Status of Canadian  
exports in this sector/subsector: Small but expanding

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

1. Hydro power equipment
2. Thermal/boilers
3. Consultancy services

## Factors contributing to current successful Canadian exports:

- Aggressive marketing
- CIDA programs
- Competitive Canadian financing

## Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Non-competitive financing
- Foreign exchange
- limitations

- \_\_\_\_\_  
- \_\_\_\_\_

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: HARARE

Market: ZIMBABWE

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

- Activity: Zimbabwe has number proposed rehabilitation projects with WB financing awaiting publication tender. Canadian interest
- Expected Results: Canadian involvement
- Activity: Hydro power schemes to meet future needs will be subject to tenders. Canadian companies will be advised.
- Expected Results: Canadian involvement
- Activity: Zimbabwe also to rehabilitate old thermal power stations. Canadian companies actively following & submit bids.
- Expected Results: Canadian involvement
- Activity: Malawi has received world bank financing for power sector studies. Two Canadian companies short listed.
- Expected Results: Canadian companies to be awarded tenders.

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: HARARE

Market: ZIMBABWE

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: ALL SUB-SECTORS

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 60.00 \$M   | 70.00 \$M  | 79.00 \$M                   | 84.00 \$M                |
| Canadian Exports            | 0.44 \$M    | 3.00 \$M   | 11.00 \$M                   | 12.00 \$M                |
| Canadian Share<br>of Market | 0.73 %      | 4.28 %     | 13.90 %                     | 14.20 %                  |

Cumulative 3 year export potential for  
CDN products in this sector/subsector: 5-15 \$M

## Major Competing Countries

## Market Share

|                          |         |
|--------------------------|---------|
| UNITED STATES OF AMERICA | 40.00 % |
| UNITED KINGDOM           | 18.00 % |
| GERMANY WEST             | 15.00 % |
| FRANCE                   | 14.00 % |

Current Status of Canadian  
exports in this sector/subsector: Well established and growing

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

1. Locomotives
2. Commuter Aircraft
3. Rail Track equipment
4. Rail and materials

## Factors contributing to current successful Canadian exports:

- Aggressive marketing
- CIDA programs
- Competitive pricing

## Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Non-competitive financing
- Foreign exchange
- limitations

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: HARARE

Market: ZIMBABWE

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: National Railways (NRZ) Zimbabwe tender for 30 locomotives.  
Expected Results: GM Cda have submitted bid & stand good chance.

Activity: Air Zimbabwe need to acquire 2 commuter aircraft to service domestic centres-tourism.  
Expected Results: Boeing DeHavilland offer DASH 8/CIDA finan. under consider'n

Activity: NRZ have issued tender for + 270 coaches over 8 year period  
Expected Results: Cdn company & Zimbabwe mfr submitted joint venture offer.



RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: HARARE

Market: ZIMBABWE

Sector : FOREST PRODUCTS, EQUIP, SERVICES

Sub-Sector: EQUIPMENT AND MACHINERY

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 8.00 \$M    | 8.00 \$M   | 10.00 \$M                   | 12.00 \$M                |
| Canadian Exports            | 0.34 \$M    | 1.00 \$M   | 1.60 \$M                    | 1.90 \$M                 |
| Canadian Share<br>of Market | 4.20 %      | 12.00 %    | 16.00 %                     | 15.80 %                  |

Cumulative 3 year export potential for  
CDN products in this sector/subsector: 15-30 \$M

## Major Competing Countries

## Market Share

|                          |         |
|--------------------------|---------|
| NETHERLANDS              | 40.00 % |
| SOUTH AFRICA             | 20.00 % |
| UNITED KINGDOM           | 18.00 % |
| UNITED STATES OF AMERICA | 16.00 % |

Current Status of Canadian  
exports in this sector/subsector: Small but expanding

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

1. Machinery/equipment
2. Paper

## Factors contributing to current successful Canadian exports:

- Aggressive marketing
- CIDA programs

## Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Non-competitive financing
- Foreign exchange
- limitations

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: HARARE

Market: ZIMBABWE

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: Proposed pulp and paper plant received Zimbabwe Govt. approval EDC supporting Canadian offer.  
Expected Results: Combined CAN/UK package to win contract w/EDC assistance.

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: HARARE

Market: ZIMBABWE

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

Sub-Sector: EQUIPMENT AND MACHINERY

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 30.00 \$M   | 35.00 \$M  | 38.00 \$M                   | 40.00 \$M                |
| Canadian Exports            | 1.00 \$M    | 2.00 \$M   | 2.40 \$M                    | 3.30 \$M                 |
| Canadian Share<br>of Market | 3.30 %      | 5.70 %     | 6.30 %                      | 8.20 %                   |

Cumulative 3 year export potential for  
CDN products in this sector/subsector: 5-15 \$M

## Major Competing Countries

## Market Share

|                          |         |
|--------------------------|---------|
| SOUTH AFRICA             | 29.00 % |
| UNITED KINGDOM           | 22.00 % |
| UNITED STATES OF AMERICA | 16.00 % |
| JAPAN                    | 18.00 % |

## Current Status of Canadian

exports in this sector/subsector: Small but expanding

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

1. Mining machinery and equipment
2. Non ferrous metals tin sheet

## Factors contributing to current successful Canadian exports:

- Aggressive marketing
- CIDA programs
- Strong sectoral capability in Canada

## Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Non-competitive financing
- Foreign exchange
- limitations

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: HARARE

Market: ZIMBABWE

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: CIDA Line of Credit of \$28 million available over next 4-5 years.

Expected Results: Increased share market

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: HARARE

Market: ZIMBABWE

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

Sub-Sector: PLASTICS PRODUCTS, EQUIP, SERVIC

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 58.00 \$M   | 63.00 \$M  | 74.00 \$M                   | 76.00 \$M                |
| Canadian Exports            | 0.70 \$M    | 1.60 \$M   | 2.00 \$M                    | 2.50 \$M                 |
| Canadian Share<br>of Market | 1.20 %      | 2.50 %     | 2.70 %                      | 3.20 %                   |

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

## Major Competing Countries

## Market Share

|                          |         |
|--------------------------|---------|
| UNITED KINGDOM           | 43.00 % |
| UNITED STATES OF AMERICA | 32.00 % |
| GERMANY WEST             | 12.00 % |
| SOUTH AFRICA             | 9.00 %  |

Current Status of Canadian  
exports in this sector/subsector: Small but expanding

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

1. Resins
2. Industrial chemicals

## Factors contributing to current successful Canadian exports:

- Aggressive marketing
- CIDA programs
- Competitive pricing

## Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Non-competitive financing
- Foreign exchange
- limitation

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: HARARE

Market: ZIMBABWE

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: New \$28 million CIDA Line of Credit to Zimbabwe will give more openings Canadian products.  
Expected Results: Larger share market.

## DEPARTMENT OF EXTERNAL AFFAIRS

## PEMD - Proposed Government Promotional Activities 1990/91

Proposals As Of December 23/89

Post: Harare

| <u>Start Date</u> | <u>Event Name, Location &amp; Type</u>                            | <u>Sector/Contact</u>                        |
|-------------------|---|--|
| 90/04/25          | Zimbabwe Int'l Trade Fair<br>Bulawayo<br>Fair , National Stand    | General                                      |
| 90/05/00          | Oil & Gas Mission to Angola<br>and Gabon<br>Mission Out, Industry | Oil & Gas Equipment<br>Products and Services |
| 91/03/00          | Hydro Electric Mission to<br>Angola<br>Mission Out, Industry      | Power & Energy Equip<br>& Services           |

RPTB1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 TRADE AND ECONOMIC OVERVIEW

Mission: LAGOS

Country: GHANA

The main focus of economic activity in 1989 was PNDC's continued commitment to the Economic Recovery Programme (ERP) which embraces Bank/Fund-supported programmes to improve performance throughout all sectors of the economy. Within this context both the public and private sectors pursued redeployment exercises, while the Ministry of Mobilization put in place various training programmes to bolster productivity and retrain retrenched workers. PNDC remained committed to the divestiture and privatisation of parastatals and continued its efforts to promote investment. Central Bank continued to find a market-determined exchange rate by increasing the number of Bureaux de Change from 36 to over 130, to parallel the Bank's foreign exchange auction system, with a commitment to merge the rates by 1990. To balance the heavy impact of structural adjustment on the population, the PNDC launched a Programme for Action to Mitigate the Social Cost of Adjustment (PAMSCAD) with the support of various international donors. While the economy registered impressive gains in some sectors (e.g. gold mining) concerns continue to be expressed by government and donors alike that Ghana is increasingly unable to cope with the large influx of foreign assistance (and the complex conditions which many donors impose). Despite the sizeable inflow of millions of dollars, few tangible benefits are evident particularly at the grassroots level. This has become an area of considerable concern to the PNDC who have now placed highest priority on the implementation of PAMSCAD schemes. Increased concern too has been expressed over the country's large foreign debt and the inability of the Government to attract private investment except in the mining sector. The country is also facing a serious credit squeeze largely as a result of IMF policies and the inability of commercial banks to recover outstanding loans. There are no effective mechanisms in place to mobilise private venture capital. Good rains throughout the country have improved the food supply situation and further reduced the prospect of electricity shortages which had a devastating impact on the economy in 1983/4. Poor price performance of cocoa and gold, and the mismanagement and misappropriation which have plagued the timber industry, the 3 leading foreign exchange earners mean the 6% GDP growth target is unlikely to be achieved. But opportunities for the sale of wheat, edible oils, and fish will continue. The government will place emphasis on agriculture and there will be a market for selected goods and services, as well as fertilizers. With EDC export financing and insurance, the opportunities for Canadian goods and services are greatly enhanced. The focus will be on Canadian involvement in the mining, forestry and agricultural sectors with additional opportunities in the petroleum and energy sectors through the involvement of PCIAC, and the rehabilitation of the Akosombo dam by the Volta River Authority respectively. Togo has continued in 1989 to suffer from low commodity prices for its exports of coffee, cocoa and phosphates. With IMF and WB support, economic restructuring continues with the current 5 year plan focussing on infrastructure and rural development. Benin has experienced a year of continued unrest and economic difficulty, fuelling disenchantment with strong nationalist policies. Agriculture continues to be the mainstay of the economy. Despite substantial unrecorded trade with their neighbours (both legal and illegal) and longstanding reliance on French suppliers there are



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RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: LAGOS

Country: GHANA

limited opportunities for Canadian firms capable of working in a franco-  
phone environment, particularly in the areas of infrastructure and  
institutional development which receive sizeable external financing  
support.

RPTB1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 TRADE AND ECONOMIC OVERVIEW

Mission: LAGOS

Country: NIGERIA

In 1989 Nigeria passed the midway point between the introduction of a structural adjustment programme and the return to civilian rule in 1992. Commendable progress has been made toward both, but sustained reform remains for the government a delicate process of balance. Nigeria's economy, driven by private entrepreneurship, is more open, competitive and efficient. Inflation and a persistent spread between exchange rates remain substantial challenges to SAP. The 1989 budget sought to constrain non-foreign interest payments, increase federal revenue, strengthen revenue administration and expenditure control, reduce subsidies and scale down capital projects. Aided by higher oil prices than anticipated, Nigeria has accomplished much in 1989. Most import bans have been removed (other than grains, vegetables, textiles and beer) and surcharges cancelled. There is a more uniform and lower tariff structure. Government spending, in contrast to the expansionary policies of 1987/8, has been in line with the budget although there have been severe pressures to address key infrastructure deficiencies and human needs exacerbated by seriously diminished living standards. Commercialization and privatization continue to attract interest and support and a new industrial policy was launched containing measures to encourage and simplify foreign investment. Pricing of services such as transportation, electricity and telecommunications is gradually being raised to match long run marginal costs. After a second Paris Club rescheduling in March, progress towards reconciling claims with creditors has been made and new bilaterals have been signed. A \$618 million standby facility was negotiated with the IMF. GDP grew in 1989 by 3%, in both oil and non-oil sectors. Strengthened supervision of the banking sector resulted in the prohibition of domestic loans based on foreign collateral and in the withdrawal of public sector deposits from commercial banks. This blunt instrument served to dry up liquidity and force the repatriation of foreign funds and the reduction of speculative inventories. However, it had a chilling effect on manufacturing, and caused a substantial rise in interest rates. A new T-bill tendering system introduced in August further liberalized domestic interest rates. The debt conversion programme has been sustained (now including debt owed to London Club Banks) and reached \$100 million. Reserves had reached a low of \$0.3 billion by the end of 1988 but higher oil prices have allowed its buildup throughout 1989. Conservative estimates have the CPI rising 30% by May '89, but the rate is undoubtedly higher for some groups and particularly in urban areas. Persistently high inflation coupled with high unemployment (limited job growth but rapid expansion of the labour force) will demand the maintenance of relief packages to avoid violent protest. Private investment in 1989 has been disappointing, and despite 3 years of SAP, investors are still cautious and continue to be discouraged by persistent infrastructure deficiencies, meaning higher production costs and detracting from advantages in the most promising export sector. In 1989 27.3% of export earnings went to debt service payments, further constraining import capacity and dampening growth. All officially recognized debt service payments were met in 1989 including 1988 arrears. A new exchange rate system was introduced replacing the auction with a dealers market and a daily allocation by CBN at the prevailing market rate. The Naira depreciated in January, more so on the parallel market signalling contin-

RPTB1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 TRADE AND ECONOMIC OVERVIEW

Mission: LAGOS

Country: NIGERIA

uing problems and the growing influence of non-price criteria in governing access to foreign exchange at the official rate. Tightening liquidity and increased FEM funding have reduced the spread and added to upward interest rate pressure. Bureaux de change commenced operation in 1989 where the exchange rate is freely negotiable. The spread between the official and parallel rates while narrowing, remains of great concern. For 1990, a formidable policy challenge is presented: to maintain the precarious balance between economic stabilization, payment of creditors and essential social expenditure. To survive the transition to civilian rule, the gains of SAP must be consolidated and broad support for economic reform must be found. Continued high population growth threatens any increase in per capita income which is forecast to remain below \$300 this century. Nigeria's new IDA eligibility will add \$100 million (for agriculture and rural development) to annual World Bank lending of \$1 billion (\$500 million quick disbursing to support tax, budgeting and financial reform) in agriculture, education (shift from academic to technical) health and infrastructure. Real import levels must rise (forecast to reach over \$6 billion) in 1990, if any growth in consumption and investment is to occur. GDP is forecast to grow by 2.5%, exports by 6.6% and imports by 3.4%. The CPI is rather optimistically forecast to rise by 20%. Debt service payments are predicted to be as much as 50% of export earnings (to remain largely from oil) in 1990, seriously constraining government investment. Imports will continue to come primarily from western Europe (France, UK, West Germany), Japan and the USA with growing supply from India, Brazil, Taiwan and PRC. For Canadian exporters of goods and services, Nigeria remains a difficult and competitive market but one of opportunity in selected sectors and larger overall than in 1989. As traditional suppliers lose market share it is timely for determined and well-prepared exporters to present alternate sources. For Canadian companies the continued absence of EDC cover and CIDA assistance, will impair their competitive position. While stability is not in question, the Nigerian government will require increased external support in order to continue its determined pursuit of economic adjustment and growth along with political reform.

RPTB2

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 EXPORT PROMOTION PRIORITIES

Mission: LAGOS

Country: GHANA

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

## 1. GRAINS AND OILSEEDS

Ghanaians prefer Canadian grains, particularly wheat. Room to improve market share. CIDA has introduced Canola oil into the market and this can be developed into a trade relationship.

## 2. MINE, METAL, MINERAL PROD &amp; SRV

State Gold Mining Corporation's contract with CGM coupled with Cdn mining mission to Ghana in Oct 88, have enhanced the competitive posture of Cdn suppliers.

## 3. FOREST PRODUCTS, EQUIP, SERVICES

Government is now placing premium on export of semi-processed wood products. This has brought into focus the need to rehabilitate/replace existing processing machinery.

4.

5.

6.

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

- |                                     |    |
|-------------------------------------|----|
| 1. GRAINS AND OILSEEDS              | 4. |
| 2. CHEM PROD & PETROCHEM, EQP, SERV | 5. |
| 3. INDUSTRIAL MACHIN, PLANTS, SERV. | 6. |

RPTB2

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 EXPORT PROMOTION PRIORITIES

Mission: LAGOS

Country: NIGERIA

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

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

The Structural Adjustment Program will continue to emphasize infrastructure development, particularly in transportation. The IBRD has supported the expansion of Nigeria's rolling stock. The past involvement of Canadian companies in equipment servicing and rehabilitation places Canada in a strong position to expand market presence.

## 2. POWER &amp; ENERGY EQUIP. &amp; SERV.

Increasing demand will place greater burdens on existing facilities and require further investment. Much of this will be funded by an IBRD loan to NEPA for rehabilitation of power distribution systems. Canadian firms are well placed because of their strong reputation in Nigeria and because of extensive past experience.

## 3. OIL &amp; GAS EQUIPMENT, SERVICES

Canada's special expertise (i.e. in oil sands extraction, pipeline technology) is also recognised. Substantial commitment by the FGN, by IFIs, and by multinational oil companies to three projects (Oso Condensates, LNG, and petrochemicals) suggests that 1990-5 will witness improved opportunities in this sector.

## 4. ADVANCED TECH. PROD. &amp; SERV

Communications continue to be vital in Nigeria's economic development strategies. Although highly competitive, it is a market with strong growth potential, notably for communications/information systems related to the petroleum sector and for computer consulting services.

## 5. AGRI &amp; FOOD PRODUCTS &amp; SERVICE

Although food imports have declined, increasing emphasis on self-sufficiency and growth of non-oil exports (i.e. food exports) should result in increased opportunities for Canadian food production, distribution, and storage technology. The IFIs maintain their support for infrastructure projects where Canada has a strong presence.

6.

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

1. OIL & GAS EQUIPMENT, SERVICES
2. CHEM PROD & PETROCHEM, EQP, SERV
3. POWER & ENERGY EQUIP. & SERV.

4. INDUSTRIAL MACHIN, PLANTS, SERV.
5. MINE, METAL, MINERAL PROD & SRV
6. CONSUMER PRODUCTS & SERVICES

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LAGOS

Market: GHANA

Sector : GRAINS AND OILSEEDS

Sub-Sector: ALL SUB-SECTORS

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 20.00 \$M   | 20.00 \$M  | 20.00 \$M                   | 20.00 \$M                |
| Canadian Exports            | 10.00 \$M   | 12.00 \$M  | 12.00 \$M                   | 13.00 \$M                |
| Canadian Share<br>of Market | 50.00 %     | 60.00 %    | 60.00 %                     | 65.00 %                  |

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

| Major Competing Countries | Market Share |
|---------------------------|--------------|
| UNITED STATES OF AMERICA  | 30.00 %      |
| FRANCE                    | 10.00 %      |
| OTHER COUNTRIES           | 10.00 %      |

Current Status of Canadian  
exports in this sector/subsector: Well established and growing

Products/services for which there are good market prospects:

1. Wheat
2. Canola oil

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- CIDA programs
- Canada is one of few sources of supply
- Strong sectoral capability in Canada

Factors for Canadian exports not reaching market potential:

- \_\_\_\_\_
- \_\_\_\_\_

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LAGOS

Market: GHANA

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: Distributors of Canola oil to appoint local agents.  
Expected Results: Increase in trade.

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LAGOS

Market: GHANA

Sector : FOREST PRODUCTS, EQUIP, SERVICES

Sub-Sector: ALL SUB-SECTORS

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 15.00 \$M   | 35.00 \$M  | 42.00 \$M                   | 30.00 \$M                |
| Canadian Exports            | 0.75 \$M    | 2.60 \$M   | 3.00 \$M                    | 4.00 \$M                 |
| Canadian Share<br>of Market | 5.00 %      | 7.50 %     | 7.10 %                      | 13.30 %                  |

Cumulative 3 year export potential for  
CDN products in this sector/subsector: 5-15 \$M

| Major Competing Countries | Market Share |
|---------------------------|--------------|
| UNITED KINGDOM            | 60.00 %      |
| JAPAN                     | 15.00 %      |
| UNITED STATES OF AMERICA  | 12.00 %      |
| OTHER COUNTRIES           | 5.90 %       |

Current Status of Canadian  
exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. Forest harvesting equipment
2. Saw mills equipment
3. Drying kilns
4. Spare parts
5. Consultancy Services

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- CIDA programs

Factors for Canadian exports not reaching market potential:

- Market prospects have not been adequately explored
- \_\_\_\_\_
- \_\_\_\_\_



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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LAGOS

Market: GHANA

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: To follow up on Mim Timber Co. Ltd request for supply of Mack trucks and sawmilling equipment.  
Expected Results: Sale is likely to be made.

For the next fiscal year, the mission will carry out the following approved fairs and missions:

Activity: Wood processing equipment and services outgoing mission planned.  
Expected Results: To improve the understanding of the market.

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LAGOS

Market: GHANA

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

Sub-Sector: ALL SUB-SECTORS

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 10.00 \$M   | 40.00 \$M  | 60.00 \$M                   | 60.00 \$M                |
| Canadian Exports            | 0.50 \$M    | 1.50 \$M   | 3.00 \$M                    | 10.00 \$M                |
| Canadian Share<br>of Market | 5.00 %      | 3.75 %     | 5.00 %                      | 17.00 %                  |

Cumulative 3 year export potential for  
CDN products in this sector/subsector: 15-30 \$M

| Major Competing Countries | Market Share |
|---------------------------|--------------|
| UNITED KINGDOM            | 80.00 %      |
| UNITED STATES OF AMERICA  | 5.00 %       |
| FRANCE                    | 2.50 %       |
| OTHER COUNTRIES           | 7.50 %       |

Current Status of Canadian  
exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. Underground locos
2. Drilling consumables
3. Raise boring consumables
4. Mine hoists

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Fairs and Missions support
- CIDA programs
- Strong sectoral capability in Canada
- Use of agent (local)

Factors for Canadian exports not reaching market potential:

- \_\_\_\_\_
- \_\_\_\_\_

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LAGOS

Market: GHANA

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: To follow up on John T. Hepburn's bid to State Gold Mining Co  
Expected Results: To ensure fair play

For the next fiscal year, the mission will carry out the following approved fairs and missions:

Activity: Mining equip and services outgoing mission planned.  
Expected Results: To enhance competitive posture of Cdn suppliers.

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LAGOS

Market: NIGERIA

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

Sub-Sector: ALL SUB-SECTORS

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 180.00 \$M  | 200.00 \$M | 250.00 \$M                  | 250.00 \$M               |
| Canadian Exports            | 0.50 \$M    | 1.00 \$M   | 1.00 \$M                    | 1.50 \$M                 |
| Canadian Share<br>of Market | 0.30 %      | 0.50 %     | 0.40 %                      | 0.60 %                   |

Cumulative 3 year export potential for  
CDN products in this sector/subsector: 15-30 \$M

| Major Competing Countries | Market Share |
|---------------------------|--------------|
| ROMANIA                   | 20.00 %      |
| UNITED KINGDOM            | 17.00 %      |
| GERMANY WEST              | 8.00 %       |
| BULGARIA                  | 5.00 %       |
| ITALY                     | 5.00 %       |
| AUSTRIA                   | 3.00 %       |

Current Status of Canadian  
exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. Irrigation/Water Equipment and Services
2. Grains Storage Equipment and Services
3. Consulting Services

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- Competitive pricing
- Strong sectoral capability in Canada
- Willingness of exporters to invest/joint venture in territory

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LAGOS

Market: NIGERIA

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Import duties are high
- Non-competitive pricing
- Non-competitive financing
- Import ban on grains
- \_\_\_\_\_
- \_\_\_\_\_

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: Howe International consulting on Strategic Grains Reserve Project for Ministry of Agriculture.

Expected Results: Award of contract for management of grain silos to Howe.

Activity: Canadian consortium bidding to supply grain storage equipment to two prime contractors.

Expected Results: Supply of storage equipment to both contractors.

For the next fiscal year, the mission will carry out the following approved fairs and missions:

Activity: Incoming buyer to Western Canada Farm Progress Show.

Expected Results: Two new exporters introduced to market.

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LAGOS

Market: NIGERIA

Projects or portions of major projects within this sector/sub-sector s  
in the planning stage which provide opportunities for Canadian suppliers:

Third Multi-State ADP

Approximate Value: 160 M\$  
Financing Source : IDA - World Bank  
Contact : Post

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LAGOS

Market: NIGERIA

Sector : ADVANCED TECH. PROD. &amp; SERV

Sub-Sector: TELECOM, DATACOM, SAT, SPACECOM

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 39.30 \$M   | 42.00 \$M  | 50.00 \$M                   | 100.00 \$M               |
| Canadian Exports            | 1.50 \$M    | 2.00 \$M   | 1.20 \$M                    | 3.00 \$M                 |
| Canadian Share<br>of Market | 3.80 %      | 4.80 %     | 2.40 %                      | 3.00 %                   |

Cumulative 3 year export potential for  
CDN products in this sector/subsector: 5-15 \$M

## Major Competing Countries

## Market Share

|                          |         |
|--------------------------|---------|
| SWEDEN                   | 16.00 % |
| UNITED STATES OF AMERICA | 18.00 % |
| JAPAN                    | 10.00 % |
| UNITED KINGDOM           | 6.00 %  |
| GERMANY WEST             | 5.00 %  |
| NETHERLANDS              | 2.00 %  |

Current Status of Canadian  
exports in this sector/subsector: Small but expanding

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

1. Rural communications equipment
2. Switches, exchanges, PABX's
3. Data communications equipment
4. Satellite related equipment
5. Handsets
6. Power supplies and peripherals
7. Consulting services
8. Training, repair & testing equipment

## Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Competitive pricing
- Strong sectoral capability in Canada
- Good local representation

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LAGOS

Market: NIGERIA

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Non-competitive financing
- Limited appreciation/understanding of distribution system
- \_\_\_\_\_
- \_\_\_\_\_

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: Market study underway. Due for completion Feb 90  
Expected Results: Better information on market potential available.

Activity: Continued assistance to Spar on satellite projects.  
Expected Results: Hurdle of absence of export credit will be overcome.

Activity: Continued assistance to SR Telecom in their aggressive marketing in Nigeria  
Expected Results: Success in securing contracts currently under negotiation.



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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LAGOS

Market: NIGERIA

Projects or portions of major projects within this sector/sub-sector s  
in the planning stage which provide opportunities for Canadian suppliers:

Telecoms Loan

Approximate Value: 200 M\$  
Financing Source : IBRD - World Bank  
Contact : Post

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LAGOS

Market: NIGERIA

Sector : POWER &amp; ENERGY EQUIP. &amp; SERV.

Sub-Sector: ALL SUB-SECTORS

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 138.00 \$M  | 200.00 \$M | 300.00 \$M                  | 350.00 \$M               |
| Canadian Exports            | 0.06 \$M    | 1.50 \$M   | 10.00 \$M                   | 25.00 \$M                |
| Canadian Share<br>of Market | 0.04 %      | 0.70 %     | 3.30 %                      | 7.20 %                   |

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

| Major Competing Countries | Market Share |
|---------------------------|--------------|
| UNITED KINGDOM            | 20.00 %      |
| GERMANY WEST              | 15.00 %      |
| JAPAN                     | 15.00 %      |
| BULGARIA                  | 10.00 %      |
| UNITED STATES OF AMERICA  | 10.00 %      |
| SPAIN                     | 3.00 %       |

Current Status of Canadian  
exports in this sector/subsector: Well established and growing

Products/services for which there are good market prospects:

1. Consulting services
2. Substations
3. Transformers
4. Generators
5. ELP
6. Turbines

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Competitive pricing
- Strong sectoral capability in Canada
- Willingness of exporters to invest/joint venture in territory

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LAGOS

Market: NIGERIA

Factors for Canadian exports not reaching market potential:

- Non-competitive financing
  - Need for competitive financing.
  -
- 

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

- Activity: Support Federal Pioneer and Markham Electric in pursuit of contract for 4 substations.  
Expected Results: Canadian firms will be awarded significant part of project.
- Activity: Support Monenco on Zungeru hydro project and on bid for supervision of WBIRD loan to power sector.  
Expected Results: Successful commencement of both projects.
- Activity: Support Ontario Hydro in their bid to partner NEPA in the IBRD NEPA Rehabilitation Project.  
Expected Results: Ontario Hydro will be awarded utility partnership project.

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

- Activity: Monitor developments in IBRD NEPA Rehabilitation Project.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LAGOS

Market: NIGERIA

Projects or portions of major projects within this sector/sub-sector s  
in the planning stage which provide opportunities for Canadian suppliers:

Power Sector Loan

Approximate Value: 300 M\$  
Financing Source : IBRD - World Bank  
Contact : Post

RPTC1 TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM  
90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LAGOS

Market: NIGERIA

Sector : TRANSPORT SYS, EQUIP, COMP, SERV.

Sub-Sector: ALL SUB-SECTORS

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 259.40 \$M  | 270.00 \$M | 250.00 \$M                  | 300.00 \$M               |
| Canadian Exports            | 0.06 \$M    | 2.00 \$M   | 0.85 \$M                    | 2.50 \$M                 |
| Canadian Share<br>of Market | 0.02 %      | 0.74 %     | 0.43 %                      | 0.83 %                   |

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

## Major Competing Countries

## Market Share

|                |         |
|----------------|---------|
| UNITED KINGDOM | 20.00 % |
| FRANCE         | 18.00 % |
| GERMANY WEST   | 10.00 % |
| ROMANIA        | 8.00 %  |
| KOREA          | 6.00 %  |
| JAPAN          | 10.00 % |

## Current Status of Canadian

exports in this sector/subsector: Well established and growing

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

1. Locomotives
2. Spare parts
3. Rolling stock
4. Rolling stock - rehabilitation services
5. Railway communications
6. Inland water transportation

## Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Competitive pricing
- Strong sectoral capability in Canada

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LAGOS

Market: NIGERIA

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Non-competitive financing
- Market prospects have not been adequately explored
- \_\_\_\_\_
- \_\_\_\_\_

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: Finalize EDC financing package for Nigerian Railways Corp. purchase of 15 locomotives.

Expected Results: Conclude sale of \$US 35m of locomotives and parts.

Activity: Continue to support CANAC in World Bank rehab project.

Expected Results: Conclude sale of up to \$10m in equipment and services

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LAGOS

Market: NIGERIA

Sector : OIL &amp; GAS EQUIPMENT, SERVICES

Sub-Sector: ALL SUB-SECTORS

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 200.00 \$M  | 200.00 \$M | 200.00 \$M                  | 300.00 \$M               |
| Canadian Exports            | 0.00 \$M    | 1.00 \$M   | 2.50 \$M                    | 5.00 \$M                 |
| Canadian Share<br>of Market | 0.00 %      | 0.50 %     | 1.30 %                      | 1.70 %                   |

Cumulative 3 year export potential for  
CDN products in this sector/subsector: 5-15 \$M

## Major Competing Countries

## Market Share

|                          |         |
|--------------------------|---------|
| UNITED KINGDOM           | 30.00 % |
| UNITED STATES OF AMERICA | 25.00 % |
| NETHERLANDS              | 10.00 % |
| GERMANY WEST             | 10.00 % |
| ITALY                    | 8.00 %  |
| JAPAN                    | 5.00 %  |

Current Status of Canadian  
exports in this sector/subsector: Small but expanding

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

1. Pipeline equipment
2. Gas storage and distribution equipment
3. Gas liquification equipment
4. Exploration equipment and services
5. Drilling machinery
6. Clean-up equipment
7. Safety equipment
8. Consulting services

## Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Competitive pricing
- Strong sectoral capability in Canada

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LAGOS

Market: NIGERIA

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Non-competitive financing
- Limited appreciation/understanding of distribution system
- Performance of local agent or representative
- \_\_\_\_\_
- \_\_\_\_\_

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: Market report underway on opportunities in sector which will be distributed to Canadian industry.  
Expected Results: Canadian exporters will be better informed.

For the next fiscal year, the mission will carry out the following approved fairs and missions:

Activity: Proposed seminar promotion for selected group of Canadian exporters of goods and services.  
Expected Results: Companies will realise sales and appoint representatives.

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

Activity: Monitor and report on developments in the Oso condensates, LNG and petrochemicals projects.  
Expected Results: Alert Cdn companies of status/tenders. Sales will be made.

Activity: Identify Canadian technical partner in Ondo State Tar Sands Project.  
Expected Results: Possible visit to Canada by Nigerian technical committee.



## DEPARTMENT OF EXTERNAL AFFAIRS

PEMD - Proposed Government Promotional Activities 1990/91

Proposals As Of December 23/89

Post: Lagos

| <u>Start Date</u> | <u>Event Name, Location &amp; Type</u>  | <u>Sector/Contact</u>              |
|-------------------|---|------------------------------------|
| 90/11/00          | Energy Generation &<br>Transmission Mission To<br>Africa<br>Mission Out, Industry | Power & Energy Equip<br>& Services |
| 90/11/00          | Kaduna Trade Fair Nigeria<br>Fair, Solo   | General                            |

RPTB1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 TRADE AND ECONOMIC OVERVIEW

Mission: NAIROBI

Country: KENYA

The Kenyan economy has been growing at an annual average rate of over 5%, despite difficult conditions on the international scene. In 1988, Kenya undertook a 3 year major stabilization and adjustment program supported by IDA and IMF. The Government's policies since that date demonstrate its commitment to the program and the measures adopted are having a gradual impact on economic structure and performance over the medium term. Broadly speaking, the policy framework stresses the role of the private sector in revitalizing the economy. Kenya has expressed renewed commitment to attracting foreign investment and is taking steps to streamline some of the procedures. Plans for the establishment of export processing zones and licencing for manufacturing in bond are also proceeding in order to reduce the heavy dependance on traditional exports.

\*\*\*\*

The external account situation in the medium term will require careful management. Recent deterioration in the balance of payments is attributed to lower export receipts, particularly coffee, an increase in the price of petroleum imports and acceleration of the import liberalization strategy. With the Government's determination to avoid recourse to debt rescheduling, Kenya also appears to be taking seriously the need to limit non-concessional debt over the medium term.

\*\*\*\*

The curtailment of EDC Canada Account concessional financing over the next several years, together with the reduction in the CIDA budget, call for certain shifts in our trade development strategy. We will need to strengthen our efforts in promoting and supporting Canadian firms in projects financed by the World Bank, the African Development Bank and the UNDP. Opportunities for consulting services contracts in particular will be targeted. We will also seek to identify areas of complementarity with CIDA programs, specifically through the INC program mechanisms, e.g. CPPF, project support, joint venture promotion, etc. Opportunities for EDC traditional export financing will continue to arise for high priority items (as in the case of the recent Dash 8 sale to the Ministry of Defence) and we will continue to aggressively pursue these.

\*\*\*\*

Support to visiting trade missions, selected high profile visits to Canada by private sector and government players as well as strengthened public affairs activities will be undertaken to heighten Canada's profile as a trading partner and as an increasingly important source of expertise in management and high technology.

Sectors offering highest potential are advanced technology products/telecommunications, petroleum/oil and gas equipment and svcs, defence products, and transportation. There are good opportunities, as yet largely untapped in agricultural technology and services. Longer term prospects can be expected to emerge in the power and energy sector, in railways, and in forest-related equipment and services.

Export promotion activities will be undertaken on a selective basis in the other countries in the territory for which we are responsible: Uganda, Tanzania, Mauritius, Madagascar, Somalia, Seychelles, Comoros, and Reunion where most opportunities are linked to aid financed projects, however there are non-aid opportunities, notably in joint ventures and investment.

RPTB1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 TRADE AND ECONOMIC OVERVIEW

Mission: NAIROBI

Country: UGANDA

In 1987, Uganda launched a Rehabilitation and Development Plan covering the period 1987/88 to 1990/91. At the same time, a three-year Structural Adjustment Facility was signed with the IMF, which committed the Government to tight budgeting and cost cutting, and to promoting a mixed and more open economy. Since 1987, the economy has been growing at about 7 percent per year. However, serious weaknesses remain, especially the heavy dependence on declining coffee revenues, the increasing external debt burden and persistent high inflation.

\*\*\*\*

The main constraint on imports is the severe shortage of foreign exchange, which is being mainly targetted on essential goods such as fuel, vehicles, and medical supplies. Following a recent improvement in the security situation, and the Government's new accord with the IMF, confidence levels have risen: multilateral and bilateral aid donor agencies have begun to make increasing amounts of funding available to Uganda. Initially the funding is being directed at emergency rehabilitation of basic infrastructure and the restructuring of government and parastatal institutions.

\*\*\*\*

Export opportunities are mainly linked to aid financing under the World Bank and the African Development Bank. The most promising sectors are currently in hydro power, health, agriculture, civil aviation, and financial/management consulting services.

RPTB1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 TRADE AND ECONOMIC OVERVIEW

Mission: NAIROBI

Country: TANZANIA

A new five-year development plan was introduced in 1988/89 with a major focus on liberalization, the private sector and the production of agricultural exports. Plans included increases to investment levels in infrastructure, particularly in transport and communications, and in the agricultural sector. The recent collapse in world coffee prices however is having serious effects on Tanzania's plans as it has reduced the availability of foreign exchange. Tanzania must rely on foreign aid donors for two-thirds of its import requirements. It is in the process of negotiating another agreement with the IMF.

Overall, the Tanzanian economy has shown some signs of recovery in recent years, however the process is very slow and the country still has a long way to go to reach export levels of the late 1970's. Private importers do not normally look to Canada for products because of distance and cost. The main target for Cdn companies in Tanzania therefore continues to be in competing for contracts for projects financed by the IFI's. Canadian companies have been successful in the past (e.g. N.D.Lea and CPCS).

\*\*\*\*

Another potential area of interest is in investment. The government has not produced the long-awaited investment code (although Zanzibar has one), but is willing to negotiate with interested foreign investors. The process can, however, be laborious. Foreign investors, while not yet numerous, are showing increasing interest. Canadian companies have been looking into the mining and agricultural sectors. Tourism is another area where a number of foreign companies, including one from Cda, are looking into possibilities.

Regarding specific sector opportunities, the oil and gas sector appears to have potential. Despite some promising signs, however, only small amounts of gas have been discovered and the government has not yet decided how the field will be exploited. Shell Oil is continuing to explore on the mainland and the government wants to attract exploration offshore. If drilling activity picks up, there could be some prospects for Canadian suppliers.

\*\*\*\*

Transportation and the power and energy sectors are major areas for concentration by aid donor agencies. The World Bank is financing projects in both the road and railway sectors sub-sectors. Canadian companies have been successful in winning several of these contracts and there will continue to be opportunities over the period ahead.

RPTB2

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 EXPORT PROMOTION PRIORITIES

Mission: NAIROBI

Country: KENYA

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

1. **ADVANCED TECH. PROD. & SERV**  
Kenya has major plans for expansion of rural telecommunications and prospects for a major contract with a Cdn firm appear very good with EDC financing. KPTC also has interest in local assembly. Other prospects include sale of radio and TV transmitter eqpt to Kenya Broadcasting and a possible remote sensing technology package.
2. **OIL & GAS EQUIPMENT, SERVICES**  
Current negotiations on the West Kenya Pipeline project are expected to lead to a major consulting contract for a Cdn firm and subsequent bidding opportunities for Cdn suppliers. PCIAC's ongoing technical assistance work in Kenya has introduced Cdn drilling firms to commercial opportunities in both oil & gas and geothermal exploration.
3. **TRANSPORT SYS, EQUIP, COMP, SERV.**  
Plans for baggage handling equipmnt in Nairobi & Mombasa Intl airports are being pursued by a Cdn supplier with EDC financing. Spare parts for railway equipment as well as for P&W aircraft engines are ongoing requirements. Also we foresee opportunities for consulting services in road transport, civil aviation, rail and urban transit.
4. **DEFENCE PROGRAMS, PRODUCTS, SERV**  
Ongoing supply of spares and overhaul to DH Buffalo and Dash-8 aircraft for Defence Dept will be given continued support by the Post. There is a favourable disposition toward Canadian aircraft and prospects for future sales.
5. **AGRI & FOOD PRODUCTS & SERVICE**  
Agriculture is the backbone of Kenya's economy, yet few Canadian firms have adequately explored the potential for sales. Several upcoming IBRD projects require consultancy services which Cdn firms could provide. There are also opportunities in animal and poultry breeding stock, as well as semen and embryo transplant technology.
- 6.

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

- |                                    |                                      |
|------------------------------------|--------------------------------------|
| 1. MINE, METAL, MINERAL PROD & SRV | 4. EDUCATION, MEDICAL, HEALTH PROD   |
| 2. OIL & GAS EQUIPMENT, SERVICES   | 5. TRANSPORT SYS, EQUIP, COMP, SERV. |
| 3. POWER & ENERGY EQUIP. & SERV.   | 6. DEFENCE PROGRAMS, PRODUCTS, SERV  |

RPTB2

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 EXPORT PROMOTION PRIORITIES

Mission: NAIROBI

Country: UGANDA

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

## 1. POWER &amp; ENERGY EQUIP. &amp; SERV.

World Bank/IDA plans for hydro power generation and African Development Bank plans in transmission offer good opportunities for Cdn firms in consulting services and equipment supply. Rural electrification is in the early stages of project preparation for IDA financing.

## 2. EDUCATION, MEDICAL, HEALTH PROD

The health sector in Uganda is a high priority. The emerging World Bank Health I project has several distinct components totalling over \$ 40 million, offering opportunities for Canadian firms in consulting services and equipment supply. Health II is also under preparation, leading to further opportunities for competitive firms.

## 3. TRANSPORT SYS, EQUIP, COMP, SERV.

Uganda Railways has extensive rehabilitation plans and is receiving some IBRD funding for priority needs. Several bilateral donors are supplying capital eqpt. Main opportunities for Cda appear to be in consulting svcs and training. Rehab plans in civil aviation and airport infrastructure offer prospects for Cdn services and equipment.

## 4. OTHER SERVICES

Under World Bank/IMF structural adjustment program, funding is being provided to support broad institutional reform. There is also a range of contract opportunities in financial and management consulting services for Canadian firms willing to pursue this emerging market.

5.

6.

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

- |                                      |    |
|--------------------------------------|----|
| 1. CONSUMER PRODUCTS & SERVICES      | 4. |
| 2. TRANSPORT SYS, EQUIP, COMP, SERV. | 5. |
| 3. INDUSTRIAL MACHIN, PLANTS, SERV.  | 6. |

RPTB2

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 EXPORT PROMOTION PRIORITIES

Mission: NAIROBI

Country: TANZANIA

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

1. MINE, METAL, MINERAL PROD & SRV  
There are interesting opportunities in mineral extraction in Tanzania and Canadian firms are currently pursuing prospects in a range of areas from gold to kaolin. This sector has the potential to be a major growth area for Canadian investment, pending clarification by Tanzanian authorities of their policies.
2. TRANSPORT SYS, EQUIP, COMP, SERV.  
Port and road rehabilitation are both areas where Canadian consulting firms should pursue opportunities under IDA financing. Major projects in these two areas are currently under preparation. Canadian firms have established a foothold in the railway subsector and there should continue to be opportunities under either CIDA or IBRD funding.
3. POWER & ENERGY EQUIP. & SERV.  
The hydroelectric power sector could offer opportunities for Canadian companies. Tanzania's energy requirements are being studied by a Canadian consulting firm and this will assist in identifying priorities for investment. Tanzania will have to rely on IFI financing and on bilateral donors to assist in expanding its capacity.
4. OIL & GAS EQUIPMENT, SERVICES  
Recent natural gas discoveries have renewed hope that some oil reserves may soon be uncovered. PCIAC assistance over past several years has highlighted Canadian capabilities in the sector. IBRD is currently appraising a project in rehabilitation of petroleum distribution. Consulting services will be required.
- 5.
- 6.

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

- |                                      |                                     |
|--------------------------------------|-------------------------------------|
| 1. GRAINS AND OILSEEDS               | 4. CHEM PROD & PETROCHEM, EQP, SERV |
| 2. MINE, METAL, MINERAL PROD & SRV   | 5. AGRI & FOOD PRODUCTS & SERVICE   |
| 3. TRANSPORT SYS, EQUIP, COMP, SERV. | 6.                                  |

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: NAIROBI

Market: KENYA

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

Sub-Sector: SERVICES INCLUDING CONSULTING

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 210.00 \$M  | 225.00 \$M | 230.00 \$M                  | 240.00 \$M               |
| Canadian Exports            | 1.00 \$M    | 0.50 \$M   | 1.00 \$M                    | 1.50 \$M                 |
| Canadian Share<br>of Market | 0.50 %      | 0.20 %     | 0.40 %                      | 0.60 %                   |

Cumulative 3 year export potential for  
CDN products in this sector/subsector: 5-15 \$M

## Major Competing Countries

## Market Share

|                          |         |
|--------------------------|---------|
| UNITED KINGDOM           | 20.00 % |
| GERMANY WEST             | 10.00 % |
| DENMARK                  | 5.00 %  |
| UNITED STATES OF AMERICA | 18.00 % |

## Current Status of Canadian

exports in this sector/subsector: Small but expanding

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

1. professional and management consulting services
2. edible oil supply
3. animal and poultry breeding stock
4. agricultural machinery and tools
5. animal feed
6. fertilizer
7. veterinary pharmaceuticals

## Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- CIDA programs
- Competitive pricing
- Strong sectoral capability in Canada



RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NAIROBI

Market: KENYA

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Non-competitive financing
- Market prospects have not been adequately explored
- \_\_\_\_\_
- \_\_\_\_\_

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

Activity: Promote Canadian capabilities with Ministries of Agriculture and Livestock as well as with private sector

Expected Results: Increased sales

Activity: Sending private sector agricultural/livestock mission to appropriate industry/fair in 1990

Expected Results: Increased exposure and possible sales/joint ventures

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NAIROBI

Market: KENYA

Projects or portions of major projects within this sector/sub-sector s  
in the planning stage which provide opportunities for Canadian suppliers:

Agricultural Sector Adjustment Approximate Value: 100 M\$  
Ministry of Agriculture Financing Source : IDA - World Bank  
Contact : Cdn High Commission, Nairobi

Agricultural Natl Extension II Approximate Value: 30 M\$  
Min of Agric and Livestock Dev Financing Source : IDA - World Bank  
Contact : Cdn High Commission, Nairobi

Coffee II Approximate Value: 47 M\$  
Min of Cooperative Development Financing Source : IDA - World Bank  
Contact : Cdn High Commission, Nairobi

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: NAIROBI

Market: KENYA

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: AEROSPACE

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 200.00 \$M  | 220.00 \$M | 225.00 \$M                  | 235.00 \$M               |
| Canadian Exports            | 0.70 \$M    | 0.02 \$M   | 6.00 \$M                    | 18.00 \$M                |
| Canadian Share<br>of Market | 0.30 %      | 0.01 %     | 2.60 %                      | 7.60 %                   |

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

Major Competing Countries

Market Share

|                          |        |
|--------------------------|--------|
| UNITED STATES OF AMERICA | 0.00 % |
| UNITED KINGDOM           | 0.00 % |
| FRANCE                   | 0.00 % |

Current Status of Canadian

exports in this sector/subsector: Well established and growing

Products/services for which there are good market prospects:

1. Turbo prop transport aircraft
2. Aircraft engines and spares
3. Aircraft overhaul and repair services

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Competitive pricing
- Strong sectoral capability in Canada
- Competitive Canadian financing

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Limited Canadian capabilities

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NAIROBI

Market: KENYA

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

- Activity: Assist EDC/de Havilland with GOK in their efforts to get the loan predisbursement conditions completed.  
Expected Results: First disbursement of approx dhrs 6 million to be released.
- Activity: Continue to assist sales promotion by Cdn companies of replacement parts and assemblies for buffalo and Dash 8's.  
Expected Results: Contracts worth approx dhrs 2 million.

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: NAIROBI

Market: KENYA

Sector : ADVANCED TECH. PROD. &amp; SERV

Sub-Sector: TELECOM, DATACOM, SAT, SPACECOM

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 40.00 \$M   | 56.00 \$M  | 60.00 \$M                   | 70.00 \$M                |
| Canadian Exports            | 0.02 \$M    | 0.01 \$M   | 0.01 \$M                    | 8.00 \$M                 |
| Canadian Share<br>of Market | 0.05 %      | 0.01 %     | 0.01 %                      | 11.40 %                  |

Cumulative 3 year export potential for  
CDN products in this sector/subsector: 15-30 \$M

## Major Competing Countries

## Market Share

|                |         |
|----------------|---------|
| UNITED KINGDOM | 20.00 % |
| JAPAN          | 20.00 % |
| NETHERLANDS    | 12.00 % |
| GERMANY WEST   | 12.00 % |
| FRANCE         | 10.00 % |
| BELGIUM        | 8.00 %  |

Current Status of Canadian  
exports in this sector/subsector: Small but expanding

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

1. RURAL TELECOMM EQUIPMENT
2. PABX EQUIPMENT
3. T V AND RADIO TRANSMITTERS
4. REMOTE SENSING

## Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector

## Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Non-competitive financing
- Market prospects have not been adequately explored
- Performance of local agent or representative

- \_\_\_\_\_

- \_\_\_\_\_

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NAIROBI

Market: KENYA

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

- Activity: Continue to assist SR Telecomm to obtain contract with KPTC for rural telecomm equipment with EDC financing.  
Expected Results: Contract worth over US\$20m plus possible JV assembly.
- Activity: Provide assistance to Cdn Marconi for possible for possible future supply of telex equipment.  
Expected Results: Contract worth over US\$5m.

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

- Activity: Follow elaboration of plans for future acquisitions KPTC projects up to 1992 for expansion of telecomm networks.  
Expected Results: Sales of Cdn goods and services, unpredictable amounts.
- Activity: Assist marketing plans of Mitel in public telephone exch system.  
Expected Results: Gradual acceptance of new Cdn technology.
- Activity: Promote supply of TV & radio transmitters to Kenyan Broadcasting Corp. through local agents.  
Expected Results: Hopeful that contracts will be secured with EDC financing.
- Activity: Assist Macdonald Detwiller in promotion of Pan African Remote Sensing System in Kenya.  
Expected Results: Acceptance of proj by GOK with anticipated CIDA financing.

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: NAIROBI

Market: KENYA

Sector : TRANSPORT SYS, EQUIP, COMP, SERV.

Sub-Sector: AEROSPACE

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 190.00 \$M  | 200.00 \$M | 220.00 \$M                  | 240.00 \$M               |
| Canadian Exports            | 1.50 \$M    | 1.00 \$M   | 1.00 \$M                    | 2.50 \$M                 |
| Canadian Share<br>of Market | 0.80 %      | 0.50 %     | 0.40 %                      | 1.00 %                   |

Cumulative 3 year export potential for  
CDN products in this sector/subsector: 5-15 \$M

Major Competing Countries

Market Share

|                |         |
|----------------|---------|
| FRANCE         | 20.00 % |
| JAPAN          | 15.00 % |
| NETHERLANDS    | 15.00 % |
| UNITED KINGDOM | 10.00 % |

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. Airport baggage handling equipment and spares
2. Pratt and Whitney engines and spares
3. Consulting services for road transport systems
4. Consulting svcs for civil aviation & urban transit
5. Navigation aids
6. Light transport aircraft, including used.

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Competitive pricing
- Strong sectoral capability in Canada

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Non-competitive financing

- \_\_\_\_\_  
- \_\_\_\_\_

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NAIROBI

Market: KENYA

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

Activity: Strengthen linkages with IBRD and AfDB to identify projects for Cdn firms under IFI financing.

Expected Results: Increase access to concessional financing.

Activity: Pursue opportunities for Cdn firms in Nairobi urban transit project currently under preparation for poss IBRD funding.

Expected Results: Possible consulting contracts.



RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: NAIROBI

Market: KENYA

Sector : OIL &amp; GAS EQUIPMENT, SERVICES

Sub-Sector: SERVICES INCLUDING CONSULTING

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 40.00 \$M   | 50.00 \$M  | 55.00 \$M                   | 60.00 \$M                |
| Canadian Exports            | 2.00 \$M    | 3.00 \$M   | 3.00 \$M                    | 8.00 \$M                 |
| Canadian Share<br>of Market | 5.00 %      | 6.00 %     | 5.40 %                      | 13.00 %                  |

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

## Major Competing Countries

## Market Share

|                          |         |
|--------------------------|---------|
| JAPAN                    | 12.00 % |
| FRANCE                   | 20.00 % |
| UNITED STATES OF AMERICA | 20.00 % |
| UNITED KINGDOM           | 18.00 % |
| NETHERLANDS              | 20.00 % |

## Current Status of Canadian

exports in this sector/subsector: Well established and growing

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

1. Oil and gas pipeline engineering services & eqpt
2. Pumping equipment
3. Remote power equipment
4. Oilfield equipment and services
5. Geothermal energy applications in services & eqpt

## Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Competitive pricing
- Strong sectoral capability in Canada
- Competitive Canadian financing
- Willingness of exporters to invest/joint venture in territory

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NAIROBI

Market: KENYA

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Market prospects have not been adequately explored
- \_\_\_\_\_
- \_\_\_\_\_

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: Assist EDC/Lavalin in finalizing negotiations for participation with Japan and France in W. Kenya Pipeline project  
Expected Results: Contract for more than US \$40 m & spin-off business.

Activity: Extension to 1992 of PCIAC technical assistance to Kenya oil and gas sector will keep Cda in favorable position.  
Expected Results: Further opportunities for Cdn oilfield services and eqpt.

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

Activity: Strengthen contact with World Bank to promote Cdn expertise in this sector and to identify opportunities for Cdn firms.  
Expected Results: Improved access to other sources of concessional financing.

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: NAIROBI

Market: KENYA

Sector : OIL &amp; GAS EQUIPMENT, SERVICES

Sub-Sector: ALL SUB-SECTORS

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 0.00 \$M    | 0.00 \$M   | 0.00 \$M                    | 0.00 \$M                 |
| Canadian Exports            | 3.00 \$M    | 0.01 \$M   | 0.01 \$M                    | 12.00 \$M                |
| Canadian Share<br>of Market | 0.00 %      | 0.00 %     | 0.00 %                      | 0.00 %                   |

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

## Major Competing Countries

## Market Share

|                          |        |
|--------------------------|--------|
| JAPAN                    | 0.00 % |
| FRANCE                   | 0.00 % |
| UNITED STATES OF AMERICA | 0.00 % |
| UNITED KINGDOM           | 0.00 % |

## Current Status of Canadian

exports in this sector/subsector: Small but expanding

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

1. Consulting Services for Pipelines
2. Pumping equipment
3. remote power systems
4. oilfield drilling services and eqpt
5. LPG eqpt

## Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Competitive pricing
- Strong sectoral capability in Canada
- Competitive Canadian financing
- Willingness of exporters to invest/joint venture in territory

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NAIROBI

Market: KENYA

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
  - Non-competitive financing
  - Market prospects have not been adequately explored
- 

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

- Activity: Lavalin completing negs on commercial contract with Jpnse & French partners. Awaiting GOK decision on financial offers.  
Expected Results: Contract worth over U.S.\$40 million.
- Activity: PCIAC has extended their technical assistance contract with Kenya Natl Oil Corpn to 1992. Could lead to more spin-offs.  
Expected Results: Possible equipment supply and drilling services contracts.

For the next fiscal year, the mission will carry out the following approved fairs and missions:

- Activity: Kenyan participation in National Petroleum Show in 1990  
Expected Results: Improved exposure to Cdn eqpt and technology -possible sales

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

- Activity: Kenyan participation in National Petroleum Show 1990  
Expected Results: Increased exposure to Cdn eqpt and technology
- Activity: Provide support to Cdn suppliers of pumping eqpt and other eqpt needs for the West Kenya Pipeline project.  
Expected Results: Award of contract to Cdn suppliers.

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: NAIROBI

Market: UGANDA

Sector : POWER &amp; ENERGY EQUIP. &amp; SERV.

Sub-Sector: CONSULTING &amp; OTHER SERVICES

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 0.00 \$M    | 0.00 \$M   | 0.00 \$M                    | 0.00 \$M                 |
| Canadian Exports            | 0.00 \$M    | 0.00 \$M   | 0.00 \$M                    | 0.50 \$M                 |
| Canadian Share<br>of Market | 0.00 %      | 0.00 %     | 0.00 %                      | 0.00 %                   |

Cumulative 3 year export potential for  
CDN products in this sector/subsector: 1-3 \$M

Major Competing Countries

Market Share

|                |        |
|----------------|--------|
| UNITED KINGDOM | 0.00 % |
| GERMANY WEST   | 0.00 % |

Current Status of Canadian

exports in this sector/subsector: No export results to date

Products/services for which there are good market prospects:

1. Consulting services
2. transmission eqpt
3. hydro power generation eqpt

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Competitive pricing
- Strong sectoral capability in Canada

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
  - Non-competitive financing
  - N
  -
-

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NAIROBI

Market: UGANDA

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

Activity: Actively promote Cdn services and equipment under IBRD  
Power III project including hydro power and rural electrif.  
Expected Results: Consulting services over \$.5 million and ancillary eqpt.

Projects or portions of major projects within this sector/sub-sector s  
in the planning stage which provide opportunities for Canadian suppliers:

|                                 |                    |                               |
|---------------------------------|--------------------|-------------------------------|
| Power III -Uganda Elec Board    | Approximate Value: | 111 M\$                       |
| Rural Electrification component | Financing Source : | IDA - World Bank              |
|                                 | Contact            | : UEB telex 973 61028 Kampala |

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: NAIROBI

Market: UGANDA

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: CONSULTING &amp; OTHER SERVICES

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 0.00 \$M    | 0.00 \$M   | 0.00 \$M                    | 0.00 \$M                 |
| Canadian Exports            | 0.00 \$M    | 0.20 \$M   | 0.20 \$M                    | 0.30 \$M                 |
| Canadian Share<br>of Market | 0.00 %      | 0.00 %     | 0.00 %                      | 0.00 %                   |

Cumulative 3 year export potential for  
CDN products in this sector/subsector: 1-3 \$M

| Major Competing Countries | Market Share |
|---------------------------|--------------|
| ITALY                     | 0.00 %       |
| DENMARK                   | 0.00 %       |
| UNITED KINGDOM            | 0.00 %       |
| GERMANY WEST              | 0.00 %       |

Current Status of Canadian  
exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. Consulting and training services in railways
2. Consulting services in civil aviation
3. Railway info systems
4. Used track supply

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- CIDA programs
- Strong sectoral capability in Canada
- Competitive Canadian financing

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Non-competitive financing
- Market prospects have not been adequately explored

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NAIROBI

Market: UGANDA

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

Activity: Promotion of Canadian capabilities in services and eqpt  
in rail and civil aviation sectors.

Expected Results: Possible contracts under AfDB or IBRD financing



RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: NAIROBI

Market: UGANDA

Sector : EDUCATION, MEDICAL, HEALTH PROD

Sub-Sector: SERVICES INCLUDING CONSULTING

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 0.00 \$M    | 0.00 \$M   | 0.00 \$M                    | 0.00 \$M                 |
| Canadian Exports            | 0.10 \$M    | 0.10 \$M   | 3.00 \$M                    | 1.00 \$M                 |
| Canadian Share<br>of Market | 0.00 %      | 0.00 %     | 0.00 %                      | 0.00 %                   |

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

Major Competing Countries

Market Share

|                |        |
|----------------|--------|
| DENMARK        | 0.00 % |
| JAPAN          | 0.00 % |
| UNITED KINGDOM | 0.00 % |

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. Consulting services in health planning
2. radio broadcast equipment
3. pharmaceuticals
4. hospital /medical equipment and supplies

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- CIDA programs
- Strong sectoral capability in Canada
- Competitive Canadian financing

Factors for Canadian exports not reaching market potential:

- Non-competitive financing
- Market prospects have not been adequately explored
- \_\_\_\_\_
- \_\_\_\_\_

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NAIROBI

Market: UGANDA

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: Continue to assist Canadian consultant in competing for services contract under IBRD Health I project  
Expected Results: Possible Contract for \$ 2 Million

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

Activity: Assist Cdn supplier with bid to supply radio transmitter equipment under IBRD Health I project.  
Expected Results: Possible contract for U.S. \$ 2 Million

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NAIROBI

Market: UGANDA

Projects or portions of major projects within this sector/sub-sector s  
in the planning stage which provide opportunities for Canadian suppliers:

|  |  |
|--|--|
| Education V<br>Ministry of Education           | Approximate Value: 20 M\$<br>Financing Source : IDA - World Bank<br>Contact : Min of Ed P.O.Box 7063 Kampala                         |
| Health II<br>Ministry of Health                | Approximate Value: 25 M\$<br>Financing Source : IDA - World Bank<br>Contact : Min of Health, Kampala, Uganda                         |
| Rehab of Mulago Hospital<br>Ministry of Health | Approximate Value: 15 M\$<br>Financing Source : AFDB - African Devlpmt Bank<br>Contact : Min of H. P.O.Box 8, Kampala<br>Telex 61372 |

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: NAIROBI

Market: TANZANIA

Sector : POWER &amp; ENERGY EQUIP. &amp; SERV.

Sub-Sector: CONSULTING &amp; OTHER SERVICES

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 0.00 \$M    | 0.00 \$M   | 0.00 \$M                    | 0.00 \$M                 |
| Canadian Exports            | 0.00 \$M    | 1.30 \$M   | 1.50 \$M                    | 2.00 \$M                 |
| Canadian Share<br>of Market | 0.00 %      | 0.00 %     | 0.00 %                      | 0.00 %                   |

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

## Major Competing Countries

## Market Share

|                |        |
|----------------|--------|
| UNITED KINGDOM | 0.00 % |
| JAPAN          | 0.00 % |
| GERMANY WEST   | 0.00 % |

Current Status of Canadian  
exports in this sector/subsector: Small but expanding

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

1. Consulting services
2. Generation and transmission equipment

## Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- CIDA programs
- Competitive pricing
- Strong sectoral capability in Canada
- Competitive Canadian financing

## Factors for Canadian exports not reaching market potential:

- Market prospects have not been adequately explored
- \_\_\_\_\_
- \_\_\_\_\_

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NAIROBI

Market: TANZANIA

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

- Activity: Expect new opportunities to emerge from sector study and these will need follow-up by Post.  
Expected Results: Early identification of bidding opportunities for Cdn firms
- Activity: Undertake a general market survey of other prospects in the sector.  
Expected Results: Seek to expand Canadian participation in sector activities.

Projects or portions of major projects within this sector/sub-sector s in the planning stage which provide opportunities for Canadian suppliers:

|                                |                    |                                |
|--------------------------------|--------------------|--------------------------------|
| Zanzibar/Pemba Power Rehab     | Approximate Value: | 16 M\$                         |
| Zanz. State Fuel & Power Corp. | Financing Source : | AFDB - African Devlpmt Bank    |
|                                | Contact            | : Cdn High Commission, Nairobi |
|                                |                    | Tlx 334-035 DOMCAN             |

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: NAIROBI

Market: TANZANIA

Sector : TRANSPORT SYS, EQUIP, COMP, SERV.

Sub-Sector: CONSULTING &amp; OTHER SERVICES

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 0.00 \$M    | 0.00 \$M   | 0.00 \$M                    | 0.00 \$M                 |
| Canadian Exports            | 4.50 \$M    | 6.40 \$M   | 6.50 \$M                    | 7.00 \$M                 |
| Canadian Share<br>of Market | 0.00 %      | 0.00 %     | 0.00 %                      | 0.00 %                   |

Cumulative 3 year export potential for  
CDN products in this sector/subsector: 15-30 \$M

Major Competing Countries

Market Share

|                          |        |
|--------------------------|--------|
| EUROPEAN COMMON MARKET C | 0.00 % |
| SCANDINAVIA              | 0.00 % |

Current Status of Canadian

exports in this sector/subsector: Well established and growing

Products/services for which there are good market prospects:

1. Consulting Services
2. Locomotive Spares
3. Aircraft Spares Tire Cord
4. Motor Vehicle parts
5. Road Maintenance Equipment
6. Port Handling Equipment

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- CIDA programs
- Competitive pricing
- Competitive Canadian financing
- Activities in sector have
- CIDA program.
- been largely financed by

Factors for Canadian exports not reaching market potential:

- IFI projects not pursued
-

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NAIROBI

Market: TANZANIA

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

Activity: General market survey to be undertaken  
Expected Results: Identify opportunities that should be pursued by firms.

Projects or portions of major projects within this sector/sub-sector s  
in the planning stage which provide opportunities for Canadian suppliers:

|   |  |
|---|--|
| Ports Modernization<br>Tanz. Harbours Auth. (THA)           | Approximate Value: 30 M\$<br>Financing Source : IDA - World Bank<br>Contact : Cdn High Commission, Nairobi<br>or telex THA 413-46 in Dar   |
| Roads I - Rehab Program<br>Ministry of Transport            | Approximate Value: 15 M\$<br>Financing Source : IDA - World Bank<br>Contact : Cdn High Commission, Nairobi<br>tlx 22198 DOMCAN             |
| Integrated Roads Project<br>Ministry Communications & Works | Approximate Value: 816 M\$<br>Financing Source : AFDB - African Devlpmt Bank<br>Contact : Cdn High Commission, Nairobi<br>tlx 22198 DOMCAN |

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: NAIROBI

Market: TANZANIA

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

Sub-Sector: MINE DEVELOPMENT SERVICES

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 0.00 \$M    | 0.00 \$M   | 0.00 \$M                    | 0.00 \$M                 |
| Canadian Exports            | 0.00 \$M    | 0.20 \$M   | 0.20 \$M                    | 0.50 \$M                 |
| Canadian Share<br>of Market | 0.00 %      | 0.00 %     | 0.00 %                      | 0.00 %                   |

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

Major Competing Countries

Market Share

|                |        |
|----------------|--------|
| FINLAND        | 0.00 % |
| UNITED KINGDOM | 0.00 % |
| IRAN           | 0.00 % |

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. consulting services
2. equipment and machinery
3. aluminum supply

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- CIDA programs
- Competitive pricing
- Strong sectoral capability in Canada
- Willingness of exporters to invest/joint venture in territory

Factors for Canadian exports not reaching market potential:

- Market prospects have not been adequately explored
- \_\_\_\_\_
- \_\_\_\_\_



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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NAIROBI

Market: TANZANIA

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: Continue providing assistance to Canadian companies in interface with GOT - particularly re investment policy.  
Expected Results: Conclude successful Canadian mining investment in Tanzania

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

Activity: Promote Canadian capabilities in assisting Tanzania in developing mineral activities  
Expected Results: Enhance receptivity to Canadian investment.

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: NAIROBI

Market: TANZANIA

Sector : OIL &amp; GAS EQUIPMENT, SERVICES

Sub-Sector: SERVICES INCLUDING CONSULTING

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 0.00 \$M    | 0.00 \$M   | 0.00 \$M                    | 0.00 \$M                 |
| Canadian Exports            | 0.00 \$M    | 0.00 \$M   | 0.40 \$M                    | 0.40 \$M                 |
| Canadian Share<br>of Market | 0.00 %      | 0.00 %     | 0.00 %                      | 0.00 %                   |

Cumulative 3 year export potential for  
CDN products in this sector/subsector: 1-3 \$M

| Major Competing Countries | Market Share |
|---------------------------|--------------|
| ITALY                     | 0.00 %       |

Current Status of Canadian  
exports in this sector/subsector: No export results to date

Products/services for which there are good market prospects:

1. consulting services
2. pipeline equipment

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- CIDA programs
- Competitive pricing
- Strong sectoral capability in Canada
- Competitive Canadian financing

Factors for Canadian exports not reaching market potential:

- Market prospects have not been adequately explored
- \_\_\_\_\_
- \_\_\_\_\_

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NAIROBI

Market: TANZANIA

Projects or portions of major projects within this sector/sub-sector s  
in the planning stage which provide opportunities for Canadian suppliers:

|                              |                    |                                |
|------------------------------|--------------------|--------------------------------|
| Petroleum Rehab Project      | Approximate Value: | 30 M\$                         |
| Min Mineral Resources&Energy | Financing Source : | IDA - World Bank               |
|                              | Contact            | : Cdn High Commission, Nairobi |
|                              |                    | Tlx 22198 DOMCAN               |

## DEPARTMENT OF EXTERNAL AFFAIRS

## PEMD - Proposed Government Promotional Activities 1990/91

Proposals As Of December 23/89

Post: Nairobi

| <u>Start Date</u> | <u>Event Name, Location &amp; Type</u>  | <u>Sector/Contact</u>              |
|-------------------|---|------------------------------------|
| 90/06/00          | Buyers from Africa to Western<br>Farm Progress Show, Regina<br>Mission In, To Fair        | Agri & Food Products<br>& Services |
| 90/06/00          | Buyers from Africa to National<br>Petroleum Show, Alberta<br>Mission In, Industry         | Oil & Gas Equipment<br>& Services  |
| 90/07/00          | Multi-sectoral Mission From<br>Kenya<br>Mission In, Industry                              | General                            |
| 90/11/00          | Buyers from Africa To Royal<br>Agricultural Winter Fair<br>Toronto<br>Mission In, To Fair | Agri & Food Products<br>& Services |

RPTB1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 TRADE AND ECONOMIC OVERVIEW

Mission: RABAT

Country: MOROCCO

In 1988, Morocco was once again one of Canada's major markets in Africa and the Middle East. With exports of \$278 million, Morocco was second only to Algeria (by \$10 million) as a purchaser of Canadian goods. Sulphur again dominated the figures, representing 85% of exports (\$235 million), followed by wheat, ambulances, steel rails and asbestos.

In 1989, exports will be down significantly owing to problems in the international phosphate market & the resultant decline in Moroccan demand for sulphur (sulphur is used in the processing of phosphate). Total exports for this year should be in the \$100-130 million range, of which only \$20 million will be sulphur. This means a substantial diversification into non sulphur exports, primarily telecommunications products (Northern Telecom), metals and minerals, steel and railroad rails. We view this as a healthy trend and one which will ultimately make Morocco a more mature, diversified and stable market for Canada.

In addition to sales contracts, increasing numbers of Canadian firms are establishing offices in Morocco. Bell Canada has 80 Canadian staff and Videotron has 7. Northern Telecom has now opened a sales office in Casablanca. Three consulting firms, ETI, Setym/Dessau and Deltri have also opened offices and Petro Canada Intl's activities will continue for the next few years.

-----  
Moroccans retain an enthusiastic interest in Canada and the Embassy is increasingly approached for help to identify joint venture partners in such fields as agriculture, informatics and communications. Loblaw's is currently discussing investment possibilities with a large agricultural group. We expect this aspect of our work to continue.

In 1990-91, the Post will attempt to continue diversification away from sulphur. Great progress has already been made in the high tech. sector (telecomms and informatics). New initiatives will be taken in areas of fisheries, agriculture (livestock and services), forest products, minerals and metals (steel), energy (electricity), and consulting services. The transportation sector (urban, air, rail) will be closely monitored. Major customers will remain the state companies. Financing remains a problem in Morocco. The temporary inaccessibility of CIDA's parallel line of credit had a negative impact on various sales possibilities as does the lack of availability of concessional financing. Our competitors, primarily Europeans, offer attractive financing packages to Morocco and we are increasingly under pressure in this regard.

In 1988, the economic results proved satisfactory in several respects and fit in with the stabilization and reorganization program whose benefits had already made themselves felt in the previous year. During that year the favourable repercussions of the international climate and the effects of an exceptional agricultural season led to a 10% rise in the GDP in real terms, whereas it was down by 2.9% in 1987, due to the bad cereal crop (-24%). Agricultural value increased fact by 32%, but other sectors also fared well :

+ 15% for mines; + 7% for energy; + 5% for manufacturing industry; + 10% for building and public works, and + 5% for the services industries. These results were achieved without aggravating inflationary tensions; price increases were limited to 4.1%. Exports have increased by 27.2% and

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RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: RABAT

Country: MOROCCO

imports by 10.9. The ratio of exports to imports improved from 66.3% to 76%. Foreign debt remains high and negotiations are currently taking place with private banks within the framework of the Brady Plan.

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: RABAT

Market: MOROCCO

Sector : FISHERIES, SEA PRODUCTS &amp; SERV.

Sub-Sector: MARINE HARV, PROC MACH &amp; EQUIP

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 37.00 \$M   | 40.00 \$M  | 50.00 \$M                   | 60.00 \$M                |
| Canadian Exports            | 0.00 \$M    | 0.00 \$M   | 0.00 \$M                    | 0.00 \$M                 |
| Canadian Share<br>of Market | 0.00 %      | 0.00 %     | 0.00 %                      | 0.00 %                   |

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

## Major Competing Countries

## Market Share

|              |         |
|--------------|---------|
| FRANCE       | 50.00 % |
| SPAIN        | 25.00 % |
| JAPAN        | 15.00 % |
| GERMANY WEST | 5.00 %  |

Current Status of Canadian  
exports in this sector/subsector: No export results to date

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

1. Engins de pêche
2. Radars, sonars
3. Chaîne de froid
4. Equipement de conserverie
5. Services de consultation

## Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector

## Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Non-competitive financing
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: RABAT

Market: MOROCCO

For the next fiscal year, the mission will carry out the following approved fairs and missions:

Activity: Journées Techniques dans le secteur de la pêche.  
Expected Results: Faire connaître Tech.cdne et intéresser soc.cdn à ce marché

Projects or portions of major projects within this sector/sub-sector s  
in the planning stage which provide opportunities for Canadian suppliers:

Renouvellement Flotte Cotière Approximate Value: 180 M\$  
Modernisation des conserveries Financing Source : AFDB - African Devlpmt Bank  
IBRD - World Bank  
Contact : Ambassade



RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: RABAT

Market: MOROCCO

Sector : ADVANCED TECH. PROD. &amp; SERV

Sub-Sector: ALL SUB-SECTORS

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 214.00 \$M  | 294.00 \$M | 335.00 \$M                  | 421.00 \$M               |
| Canadian Exports            | 0.20 \$M    | 16.50 \$M  | 104.50 \$M                  | 155.00 \$M               |
| Canadian Share<br>of Market | 0.00 %      | 5.00 %     | 31.00 %                     | 37.00 %                  |

Cumulative 3 year export potential for  
CDN products in this sector/subsector: 100+ \$M

## Major Competing Countries

## Market Share

|                          |         |
|--------------------------|---------|
| FRANCE                   | 50.00 % |
| GERMANY WEST             | 10.00 % |
| UNITED STATES OF AMERICA | 0.00 %  |
| SWEDEN                   | 0.00 %  |
| JAPAN                    | 0.00 %  |

## Current Status of Canadian

exports in this sector/subsector: Well established and growing

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

1. Lignes téléphoniques
2. Assistance technique/télécom.
3. Téléphonie rurale
4. Consultation informatique
5. Equipements télécoms
6. Assistance technique-radiodiffusion

## Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- CIDA programs
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- Competitive Canadian financing

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: RABAT

Market: MOROCCO

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
  - Market prospects have not been adequately explored
  - Concurrence franc. importante
  -
- 

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: Assistance permanente à la ste qui a remporte un important contrat de lignes téléphoniques.

Expected Results: Gagner d'autres marchés extension réseaux téléphoniques.

Activity: Assistance au bureau de vente ouvert par ste cdne à Casablanca pour vente poste téléphonique.

Expected Results: Gagner plrs marchés au sein stes marocaines privées et publ.

Activity: Assistance aux 2 bureaux de consultation informatique cdns installés au Maroc.

Expected Results: Rempporter des mandats de consultation informatique.

Activity: Mise à jour de l'étude sur télécommunication au Maroc

Expected Results: Suivre tte opportunité sur ce marché, en informer stes cdnes

For the next fiscal year, the mission will carry out the following approved fairs and missions:

Activity: Journée Technique Télécoms et Informatique

Expected Results: Faire connaître tech. cdne et créer nvlls relations aff.

Activity: Organisation conjointement avec Min Communications de mission au Maroc (OM) et de mission au Canada (IM).

Expected Results: Garder contacts avec preneurs de décisions marocains.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: RABAT

Market: MOROCCO

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

Activity: Suivre assidûment tous les AOI lancés par ONPT dans le cadre de son programme de modernisation.

Expected Results: Obtenir 1 ou 2 marchés

Activity: Suivre de près le marché de l'Informatisation des grands services publics.

Expected Results: Si AOI, amener ste cdnne à participer et à se positionner.

Projects or portions of major projects within this sector/sub-sector s in the planning stage which provide opportunities for Canadian suppliers:

Téléphonie Rurale

Approximate Value: 22 M\$

Financing Source : IBRD - World Bank

Contact : Ambassade du Canada

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: RABAT

Market: MOROCCO

Sector : POWER &amp; ENERGY EQUIP. &amp; SERV.

Sub-Sector: ALL SUB-SECTORS

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 300.00 \$M  | 350.00 \$M | 400.00 \$M                  | 500.00 \$M               |
| Canadian Exports            | 2.00 \$M    | 2.00 \$M   | 10.00 \$M                   | 15.00 \$M                |
| Canadian Share<br>of Market | 0.70 %      | 0.50 %     | 0.25 %                      | 0.30 %                   |

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

## Major Competing Countries

## Market Share

|                          |         |
|--------------------------|---------|
| UNION OF SOVIET SOC REP  | 40.00 % |
| FRANCE                   | 25.00 % |
| UNITED STATES OF AMERICA | 15.00 % |
| GERMANY WEST             | 10.00 % |
| SPAIN                    | 5.00 %  |
| ITALY                    | 5.00 %  |

Current Status of Canadian  
exports in this sector/subsector: Small but expanding

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

1. Ingénieurs conseils et autres
2. Services pour étude centrales hydro-électriques
3. Etude et services électrification rurale
4. Etudes pour énergie nucléaire
5. Fournitures équipements cables et accessoires

## Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- CIDA programs
- Competitive pricing
- Strong sectoral capability in Canada
- Competitive Canadian financing

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: RABAT

Market: MOROCCO

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored
- \_\_\_\_\_
- \_\_\_\_\_

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: Convaincre partenaires marocains des performances de la technologie canadienne.

Expected Results: Rehausser image de marque de compétence cdnne.

Activity: Etablir représentation et bureaux au Maroc.

Expected Results: Améliorer relations tant au niveau profess. que personnel.

For the next fiscal year, the mission will carry out the following approved fairs and missions:

Activity: Organiser visites de responsables marocains.

Expected Results: Convaincre des performances canadiennes.

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: RABAT

Market: MOROCCO

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: ALL SUB-SECTORS

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 108.00 \$M  | 132.00 \$M | 605.00 \$M                  | 580.00 \$M               |
| Canadian Exports            | 0.30 \$M    | 13.00 \$M  | 17.00 \$M                   | 50.00 \$M                |
| Canadian Share<br>of Market | 0.00 %      | 10.00 %    | 3.00 %                      | 9.00 %                   |

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

## Major Competing Countries

## Market Share

|                          |         |
|--------------------------|---------|
| FRANCE                   | 40.00 % |
| SPAIN                    | 30.00 % |
| UNITED STATES OF AMERICA | 20.00 % |
| GERMANY WEST             | 0.00 %  |

## Current Status of Canadian

exports in this sector/subsector: Small but expanding

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

1. Bateaux de pêches
2. Avions
3. Réacteurs
4. Bancs d'essai de reacteurs
5. Simulateurs
6. Ambulances

## Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- CIDA programs
- Competitive pricing
- Strong sectoral capability in Canada
- Competitive Canadian financing

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: RABAT

Market: MOROCCO

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Non-competitive financing
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored

- \_\_\_\_\_  
- \_\_\_\_\_

For the next fiscal year, the mission will carry out the following approved fairs and missions:

Activity: Organisation des Journées Techniques dans le secteur pêche au Maroc avec participation de plusieurs stes cdnes.  
Expected Results: Faire connaitre tech.cdne, intéresser soc. cdnes au marché

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: RABAT

Market: MOROCCO

Projects or portions of major projects within this sector/sub-sector s  
in the planning stage which provide opportunities for Canadian suppliers:

Renouvellement Flotte Cotière    Approximate Value:    190 M\$  
   Financing Source :    IBRD - World Bank  
   AFDB - African Devlpmt Bank  
   Contact                        :    Ambassade



RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: RABAT

Market: MOROCCO

Sector : FOREST PRODUCTS, EQUIP, SERVICES

Sub-Sector: ALL SUB-SECTORS

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 230.00 \$M  | 250.00 \$M | 270.00 \$M                  | 300.00 \$M               |
| Canadian Exports            | 2.00 \$M    | 3.00 \$M   | 13.00 \$M                   | 25.00 \$M                |
| Canadian Share<br>of Market | 0.90 %      | 1.20 %     | 5.00 %                      | 8.00 %                   |

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

## Major Competing Countries

## Market Share

|                         |         |
|-------------------------|---------|
| SWEDEN                  | 25.00 % |
| SPAIN                   | 15.00 % |
| FRANCE                  | 15.00 % |
| UNION OF SOVIET SOC REP | 8.00 %  |
| YUGOSLAVIA              | 7.00 %  |
| PORTUGAL                | 5.00 %  |

Current Status of Canadian  
exports in this sector/subsector: Small but expanding

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

1. Bois de construction
2. Bois de mine
3. Bois de caissage
4. Service inventaire des forêts et reboisement
5. Papier édition
6. Papier écriture
7. Papier impression

## Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- CIDA programs
- Strong sectoral capability in Canada

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: RABAT

Market: MOROCCO

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored
- \_\_\_\_\_
- \_\_\_\_\_

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: Intéresser, sensibiliser et renseigner industrie cdne sur le marché.

Expected Results: Accroître visites de fournisseurs cdns.

Activity: Améliorer réseau de représentation cdn.

Expected Results: Meilleure pénétration du marché.

For the next fiscal year, the mission will carry out the following approved fairs and missions:

Activity: Préparer rapport détaillé sur secteur.

Expected Results: Sensibiliser et intéresser industrie cdne.

RPTC1

## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: RABAT

Market: MOROCCO

Sector : OTHER SERVICES

Sub-Sector: CONSUL &amp; SERVS NOT ELSE SPECI

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 0.00 \$M    | 12.00 \$M  | 17.00 \$M                   | 25.00 \$M                |
| Canadian Exports            | 0.00 \$M    | 0.50 \$M   | 1.50 \$M                    | 3.00 \$M                 |
| Canadian Share<br>of Market | 0.00 %      | 4.00 %     | 9.00 %                      | 12.00 %                  |

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

| Major Competing Countries | Market Share |
|---------------------------|--------------|
| FRANCE                    | 50.00 %      |
| GERMANY WEST              | 30.00 %      |
| SPAIN                     | 0.00 %       |

Current Status of Canadian  
exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. Assistance technique
2. Vente de logiciel
3. Vente d'équipements

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Trade Fair activity
- CIDA programs
- Strong sectoral capability in Canada
- Competitive Canadian financing
- Willingness of exporters to invest/joint venture in territory

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: RABAT

Market: MOROCCO

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
  - Lack of promotion and advertising
  - Non-competitive financing
  - Limited appreciation/understanding of distribution system
  - FRANCE ET RFA concurrents sérieux
  -
- 

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: Organisation d'une mission marocaine au Cda afin de visiter usines d'épuration, laboratoire, fabricants de matériel etc.  
Expected Results: faire connaître technologie canadienne.

Activity: Suivre tous les AOI et en informer stes canadiennes.  
Expected Results: Gagner 3 a 4 marchés.

Activity: Assister les deux stes canadiennes qui ont ouvert des représentations au Maroc.  
Expected Results: Gagner des marchés.

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: RABAT

Market: MOROCCO

Projects or portions of major projects within this sector/sub-sector s  
in the planning stage which provide opportunities for Canadian suppliers:

|                               |                    |                   |
|-------------------------------|--------------------|-------------------|
| National Water Supply Project | Approximate Value: | 150 M\$           |
|                               | Financing Source : | IBRD - World Bank |
|                               | Contact            | : Ambassade       |

## DEPARTMENT OF EXTERNAL AFFAIRS

PEMD - Proposed Government Promotional Activities 1990/91

Proposals As Of December 23/89

Post: Rabat

| <u>Start Date</u> | <u>Event Name, Location &amp; Type</u>                                       | <u>Sector/Contact</u>                 |
|-------------------|--|---------------------------------------|
| 91/02/00          | Rail and Urban Transportation<br>Mission to Maghreb<br>Mission Out, Industry | Transport Sys., Equip.,<br>& Services |

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## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: YAOUNDE

Market: REPUBLIC OF CAMEROON

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: ALL SUB-SECTORS

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 80.00 \$M   | 80.00 \$M  | 75.00 \$M                   | 70.00 \$M                |
| Canadian Exports            | 4.50 \$M    | 4.50 \$M   | 4.00 \$M                    | 4.00 \$M                 |
| Canadian Share<br>of Market | 5.50 %      | 5.50 %     | 5.30 %                      | 5.70 %                   |

Cumulative 3 year export potential for  
CDN products in this sector/subsector: 15-30 \$M

## Major Competing Countries

## Market Share

|                          |         |
|--------------------------|---------|
| FRANCE                   | 45.00 % |
| UNITED STATES OF AMERICA | 12.00 % |
| ISRAEL                   | 10.00 % |
| GERMANY WEST             | 10.00 % |
| SPAIN                    | 5.00 %  |

## Current Status of Canadian

exports in this sector/subsector: Small but expanding

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

1. Equipements de transport terrestre
2. Equipement aerien
3. Barraques

## Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Trade Fair activity
- Competitive pricing
- Competitive Canadian financing
- Willingness of exporters to invest/joint venture in territory

## Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
  - Unsuitable product
  - Limited Canadian capabilities
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## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: YAOUNDE

Market: REPUBLIC OF CAMEROON

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

- Activity: Finaliser le contrat de vente de deux hélicoptères a la Sécurité intérieure.  
Expected Results: Mise en place du financement et livraison des appareils
- Activity: Suivi et représentation dans le cadre d'un projet de camp militaire mobile (barragues) à Sangmelina.  
Expected Results: Octroi d'un contrat de fournitures et de réalisation.
- Activity: Négociations de contrat d'entretien des avions  
Expected Results: Octroi d'un contrat

For the next fiscal year, the mission will carry out the following approved fairs and missions:

- Activity: Contacts ponctuels auprès du Ministère de la Défense  
Expected Results: Formation au Canada d'officiers locaux



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## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: YAOUNDE

Market: REPUBLIC OF CAMEROON

Projects or portions of major projects within this sector/sub-sector s  
in the planning stage which provide opportunities for Canadian suppliers:

Fourniture de camions à  
incendie

Approximate Value: 2 M\$  
Financing Source : B.C. - Buyer Credits required  
Contact : Section commerciale Tlx 8209  
KN DOMCAN YUNDE

Approvisionnement en pièces de  
rechange (aérien)

Approximate Value: 5 M\$  
Financing Source : B.C. - Buyer Credits required  
DOM - Domestically funded  
Contact : Section commerciale Tlx 8209  
KN DOMCAN YUNDE

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## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: YAOUNDE

Market: REPUBLIC OF CAMEROON

Sector : POWER &amp; ENERGY EQUIP. &amp; SERV.

Sub-Sector: ALL SUB-SECTORS

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 200.00 \$M  | 220.00 \$M | 235.00 \$M                  | 200.00 \$M               |
| Canadian Exports            | 18.00 \$M   | 18.00 \$M  | 14.00 \$M                   | 12.00 \$M                |
| Canadian Share<br>of Market | 9.00 %      | 8.00 %     | 6.00 %                      | 6.30 %                   |

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

## Major Competing Countries

## Market Share

|                          |         |
|--------------------------|---------|
| FRANCE                   | 40.00 % |
| UNITED STATES OF AMERICA | 22.00 % |
| GERMANY WEST             | 15.00 % |
| ITALY                    | 10.00 % |

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

1. Infrastructures gazières et hydro-électriques
2. Services Conseils
3. Matériel électrique

## Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- CIDA programs
- Strong sectoral capability in Canada
- Bilateral economic trade agreement
- Competitive Canadian financing

## Factors for Canadian exports not reaching market potential:

- Performance of local agent or representative
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## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: YAOUNDE

Market: REPUBLIC OF CAMEROON

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

- Activity: Appuyer le consortium canadien poursuivant la réalisation d'un projet de distribution de gaz GPL.
- Activity: Suivre l'évolution du dossier auprès des autorités locales en appui au consortium canadien poursuivant le proj. barrage
- Expected Results: Prépa'n d'étude complémentaire/finalisa'n du montage financ.
- Activity: Poursuivre le démarchage auprès de la SONEL en vue de faire connaître les fournisseurs cdns de Matériel électrique.
- Expected Results: Augment'n des fournitures cdnes de mat. élect./autres fourn

For the next fiscal year, the mission will carry out the following approved fairs and missions:

- Activity: Etude de marché pour les équipements et fournitures.
- Expected Results: Mettre en contact certains fournisseurs cdns auprès SONEL
- Activity: Suivre l'évolution du prjet pipeline Limbe-Douala.
- Expected Results: Octroi d'un contrat.

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## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: YAOUNDE

Market: REPUBLIC OF CAMEROON

Projects or portions of major projects within this sector/sub-sector s  
in the planning stage which provide opportunities for Canadian suppliers:

|  |  |
|--|--|
| Construction du Barrage de<br>Nachtigal            | Approximate Value: 500 M\$<br>Financing Source : B.C. - Buyer Credits required<br>Contact : R. Beauchesne (613) 990-6582   |
| Pipeline de prods pétroliers<br>Limbe-Douala       | Approximate Value: 30 M\$<br>Financing Source : B.C. - Buyer Credits required<br>Contact : Section Commerciale tlx:8209<br>KN DOMCAN - Yaounde (Yunde)                               |
| Fourniture de transformateurs<br>à la SONEL        | Approximate Value: 3 M\$<br>Financing Source : B.C. - Buyer Credits required<br>CIDA - Cdn Int'l Dev Agency<br>Contact : Section Commerciale Tlx:8209<br>KN DOMCAN - Yaounde (Yunde) |
| Fourniture d'équipement élec-<br>trique à la SONEL | Approximate Value: 3 M\$<br>Financing Source : CIDA - Cdn Int'l Dev Agency<br>Contact : Section Commerciale tlx:8209<br>KN DOMCAN - Yaounde (Yunde)                                  |

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## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: YAOUNDE

Market: REPUBLIC OF CAMEROON

Sector : FOREST PRODUCTS, EQUIP, SERVICES

Sub-Sector: ALL SUB-SECTORS

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 35.00 \$M   | 50.00 \$M  | 35.00 \$M                   | 20.00 \$M                |
| Canadian Exports            | 8.00 \$M    | 12.00 \$M  | 8.00 \$M                    | 4.00 \$M                 |
| Canadian Share<br>of Market | 22.00 %     | 24.00 %    | 22.00 %                     | 20.00 %                  |

Cumulative 3 year export potential for  
CDN products in this sector/subsector: 5-15 \$M

## Major Competing Countries

## Market Share

|                          |         |
|--------------------------|---------|
| FRANCE                   | 35.00 % |
| UNITED STATES OF AMERICA | 20.00 % |
| GERMANY WEST             | 18.00 % |
| ITALY                    | 15.00 % |
| BELGIUM                  | 12.00 % |

Current Status of Canadian  
exports in this sector/subsector: Small but expanding

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

1. Matériel d'exploitation forestière et de scierie
2. Consultation
3. Camion Grumier
4. Petit matériel pour travail de bois

## Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- CIDA programs
- Competitive pricing
- Strong sectoral capability in Canada
- Competitive Canadian financing

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: YAOUNDE

Market: REPUBLIC OF CAMEROON

Factors for Canadian exports not reaching market potential:

- Limited Canadian capabilities
  - Market prospects have not been adequately explored
  -
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In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: Suivre le projet "Appui forestier" en conjonction avec la SEE et l'ACDI.

Expected Results: Vente d'équip. valeur approx. de \$2 millions en 1989.

Activity: Suivre l'évolution d'un projet de complexe forestier intégré au Sud-Cameroun

Expected Results: Participation de sociétés canadiennes à la phase réalisation

Activity: Appuyer démarches de la Société de la Foresterie camerounaise.

Expected Results: Implantation d'une série avec fort contenu canadien

For the next fiscal year, the mission will carry out the following approved fairs and missions:

Activity: Surveiller évolution projets BAD et FAO dans le secteur de la forêt.

Expected Results: Contrats pour firmes canadiennes.

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: YAOUNDE

Market: REPUBLIC OF CAMEROON

Projects or portions of major projects within this sector/sub-sector s  
in the planning stage which provide opportunities for Canadian suppliers:

Furniture d'équip. forest. au Approximate Value: 5 M\$  
proj."Promo. des PME." Financing Source : B.C. - Buyer Credits required  
CIDA - Cdn Int'l Dev Agency  
Contact : Section Commerciale, Tlx:8209  
KN DOMCAN YUNDE

Projet d'atelier de sciage Approximate Value: 2 M\$  
Financing Source : B.C. - Buyer Credits required  
CIDA - Cdn Int'l Dev Agency  
Contact : Section Commerciale, Tlx:8209  
KN DOMCAN YUNDE

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## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: YAOUNDE

Market: REPUBLIC OF CAMEROON

Sector : EDUCATION, MEDICAL, HEALTH PROD

Sub-Sector: EDUCATIONAL SERVICES, EQUIPMENT

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 120.00 \$M  | 90.00 \$M  | 200.00 \$M                  | 160.00 \$M               |
| Canadian Exports            | 30.00 \$M   | 10.00 \$M  | 70.00 \$M                   | 2.00 \$M                 |
| Canadian Share<br>of Market | 25.00 %     | 11.00 %    | 35.00 %                     | 1.10 %                   |

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

| Major Competing Countries | Market Share |
|---------------------------|--------------|
| FRANCE                    | 45.00 %      |
| UNITED STATES OF AMERICA  | 12.00 %      |
| UNITED KINGDOM            | 8.00 %       |
| SPAIN                     | 5.00 %       |

Current Status of Canadian  
exports in this sector/subsector: Well established and growing

Products/services for which there are good market prospects:

1. Equipement technique de construction scolaire
2. Cité Univer. Yaounde
3. Inst. Catholique Un.

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- CIDA programs
- Strong sectoral capability in Canada
- Competitive Canadian financing

Factors for Canadian exports not reaching market potential:

- Limited Canadian capabilities
- Performance of local agent or representative



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## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: YAOUNDE

Market: REPUBLIC OF CAMEROON

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: Construction de six lycées techniques  
Expected Results: Fin des travaux selon échéancier

Activity: Suivre l'évolution des projets d'éducation sous financement Banque Mondiale à Tchad.  
Expected Results: Ident./faire connaitre débouchés pr stes cdnes/Maheu-Noiseu

For the next fiscal year, the mission will carry out the following approved fairs and missions:

Activity: Mise en place du volet formation du projet de six lycées techniques.  
Expected Results: Volet formation opérationnel avec institutions canadiennes.

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: YAOUNDE

Market: REPUBLIC OF CAMEROON

Projects or portions of major projects within this sector/sub-sector s  
in the planning stage which provide opportunities for Canadian suppliers:

Fourniture de matériel  
didactique

Approximate Value: 2 M\$  
Financing Source : DOM - Domestically funded  
B.C. - Buyer Credits required  
Contact : Section commerciale, Tlx:8209  
KN DOMCAN YUNDE

Projet Education Phase V

Approximate Value: 30 M\$  
Financing Source : IBRD - World Bank  
Contact : EXTOTT/GAT (613)990-6582, Sect.  
Comm., Tlx 8209 KN DOMCAN YUNDE

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## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

## 90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: YAOUNDE

Market: REPUBLIC OF CAMEROON

Sector : CONSTRUCTION INDUSTRY

Sub-Sector: ALL SUB-SECTORS

| Market Data                 | 2 Years Ago | 1 Year Ago | Current Year<br>(Estimated) | Next Year<br>(Projected) |
|-----------------------------|-------------|------------|-----------------------------|--------------------------|
| Market Size                 | 450.00 \$M  | 220.00 \$M | 298.00 \$M                  | 321.00 \$M               |
| Canadian Exports            | 60.00 \$M   | 11.00 \$M  | 16.00 \$M                   | 16.00 \$M                |
| Canadian Share<br>of Market | 13.00 %     | 5.00 %     | 5.00 %                      | 5.00 %                   |

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

## Major Competing Countries

## Market Share

|              |         |
|--------------|---------|
| FRANCE       | 50.00 % |
| ITALY        | 10.00 % |
| ISRAEL       | 5.00 %  |
| GERMANY WEST | 18.00 % |
| BELGIUM      | 5.00 %  |

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

1. Adduction d'eau urbaine
2. Infrastructures Agric.
3. Etudes et controle de travaux add.eau/asst. tech.
4. Construction Cité Univ.
5. Réseau de distribution gas GPL

## Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Trade Fair activity
- Competitive Canadian financing

## Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Limited Canadian capabilities
- Performance of local agent or representative

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: YAOUNDE

Market: REPUBLIC OF CAMEROON

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: Suivi régulier du projet de contrat de la construction d'une Cité Universitaire de 3500 logements.

Expected Results: L'Accord de principe a été accordé en gré à gré frime cdnne.

Activity: Suivi et représentation dans le cadre du projet de distribution du gas GPL.

Expected Results: Création d'une société mixte de distribution nationale.

For the next fiscal year, the mission will carry out the following approved fairs and missions:

Activity: Venue d'un émissaire de haut-niveau visant à appuyer l'offre canadienne.

Expected Results: Octroi du contrat de réalisation.

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## TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: YAOUNDE

Market: REPUBLIC OF CAMEROON

Projects or portions of major projects within this sector/sub-sector s  
in the planning stage which provide opportunities for Canadian suppliers:

|                               |                    |                               |
|-------------------------------|--------------------|-------------------------------|
| Cité Universitaire            | Approximate Value: | 85 M\$                        |
|                               | Financing Source : | B.C. - Buyer Credits required |
|                               | Contact            | : Jean-Yves Dionne            |
| Construction Ferme laitière   | Approximate Value: | 15 M\$                        |
|                               | Financing Source : | B.C. - Buyer Credits required |
|                               | Contact            | : Jean-Yves Dionne            |
| Réseau distribution gas GPL   | Approximate Value: | 85 M\$                        |
|                               | Financing Source : |                               |
|                               | Contact            | : Jean-Yves Dionne            |
| Adduction d'eau des 4 centres | Approximate Value: | 60 M\$                        |
|                               | Financing Source : |                               |
|                               | Contact            | : Jean-Yves Dionne            |

