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GEOGRAPHICAL SYNOPSIS

AFRICA

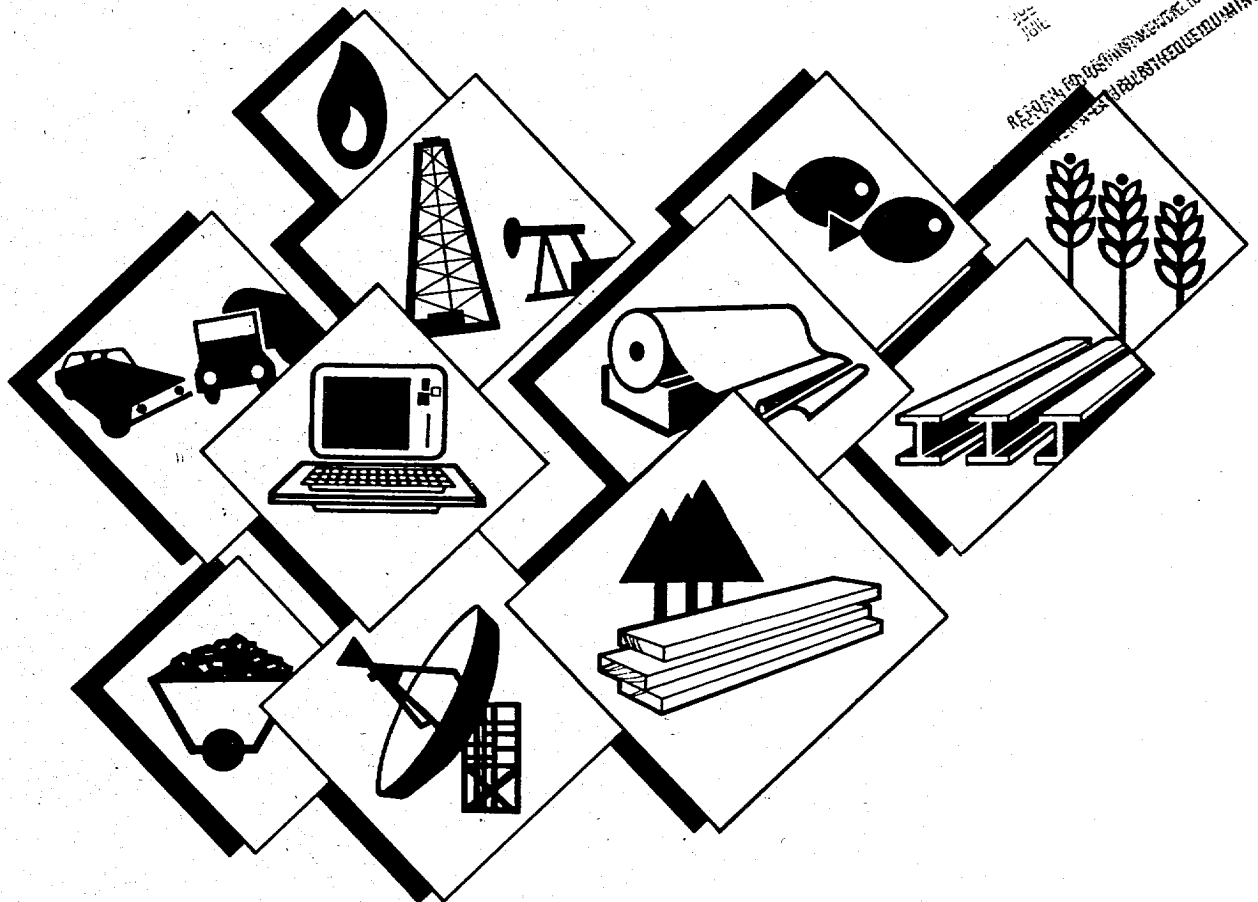
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1989-90 EXPORT AND INVESTMENT PROMOTION OPERATIONAL PLAN

Dept. of External Affairs
Min. des Affaires extérieures
OTTAWA

JUN 15 1989

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**GEOGRAPHIC SYNOPSIS OF
EXPORT PROMOTION PROGRAM PLANS
OF CANADIAN MISSIONS ABROAD
FY 1989/90**

FOREWORD

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 1989/90 commencing April 1, 1989.

The format of this synopsis is designed to provide Canadians involved in the process of export and investment promotion the means to identify quickly the key components of the trade program of External Affairs missions and access conveniently those features 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:

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

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 sectorial priorities for each market, profiles of important or interesting sectors as well as approved 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 to facilitate the assembly of vast amounts of detailed information on world markets from some 100 missions abroad. It is programmed to make this information available to the private sector, the Provinces and other departments of government in a format which would enable specific data on sectors or geographic regions to be accessed conveniently.

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 expressed concern at the decline of Canada's share of world exports. To meet this challenge, First Ministers endorsed the need to generate widespread support for a 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 focussed 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 of External Affairs

The purpose of this synopsis is to provide those engaged in the process of promoting exports from Canada the means to obtain condensed market data and 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. Where markets or sectors in these synopses stimulate interest on the part of exporters, they are invited to seek out more detailed information and further background direct from the post, the geographic and sectoral bureaux of the Department of External Affairs or the International Trade Centres located within the provincial offices of Industry, Science and Technology Canada (formerly DRIE) throughout Canada.

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 discussions 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
1989/90 Geographic Synopsis
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RPT81

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: ABIDJAN

Country: IVORY COAST

LE MOT "CRISE" EST SUR TOUTES LES LEVRES. CRISE DE L'ACTIVITE ECONOMIQUE D'ABORD PUISQUE LES MESURES D'AUSTERITE DU GOUVERNEMENT POUR REDUIRE LES DEPENSES PUBLIQUES ET CONTROLER LES INVESTISSEMENTS NON-PRODUCTIFS ONT PRODUIT UNE CONTRACTION SUBSTANTIELLE DES REVENUS ET DE LA CONSOMMATION DES MENAGES. EN TERMES REELS LE REVENU DE L'IVOIRIEN MOYEN A MARQUE UN NET RECU DEPUIS 2 ANS. LE PIB A BAISSÉ DE 2.7% EN 1987, CONFIRMANT UNE TENDANCE DON'T L'EFFET CUMULATIF INQUIETE. CRISE FINANCIERE AUSSI, MARQUEE PAR LA CHUTE DES PRIX MONDIAUX DU CACAO, CAFE ET AUTRES PRODUITS TROPICAUX. LES ECHANGES COMMERCIAUX SE SONT LARGEMENT REDUITS (-45% POUR LES EXPORTATIONS ET -21% POUR LES IMPORTATIONS EN 87) ALORS QUE LE SERVICE DE LA DETTE EXTERIEURE (ESTIMEE A 75% DU PIB) ACCENTUE LA FRAGILITE FINANCIERE DU PAYS. LES BANQUES ONT EPUISE LEUR LIQUIDITE INTERIEURE ET REDUIT LEURS POSSIBILITES DE TIRAGE A L'EXTERIEUR, SI BIEN QUE LE CREDIT BANCAIRE DEVIENT RARE. ON ANTICIPE DES PROBLEMES DE TRESORERIE POUVANT COMPROMETTRE LA CAMPAGNE EN COURS D'ACHAT DU CACAO. ON CRAINT AUSSI LES EFFETS PERVERS DE LA POLITIQUE DE STOCKAGE DU CACAO, MISE EN OEUVRE L'ETE DERNIER DANS L'ESPOIR D'INFLUENCER A LA HAUSSE LE COURS DES PRIX MONDIAUX. ENTRE-TEMPS, LES INSTITUTIONS FINANCIERES INTERNATIONALES ACCORDENT DES PRETS D'AJUSTEMENT STRUCTUREL, OBLIGEANT A DES REFORMES SEVERES DE GESTION. ON DOUTE QUE LA CI PUISSE HONORER LES NOUVELLES ECHANCES FIXEES PAR LES CLUBS DE LONDRES, PARIS ET CEE. DANS CE CONTEXTE, ON POURRAIT ASSISTER A UN RETRAIT EN CHAINE DES BAILLEURS DE FONDS.

LE GOUVERNEMENT A REAGI EN FAVORISANT UNE CERTAINE PRIVATISATION (BIEN MODESTE CAR LES INVESTISSEURS SONT ENCORE TROP PRUDENTS) VISANT UN ROLE ACCRU DU SECTEUR PRIVE DANS DIVERS SECTEURS DE L'ACTIVITE ECONOMIQUE. IL A AUSSI MISE SUR L'AGRICULTURE, SECTEUR FORT DE L'ECONOMIE, PAR LA MISE EN OEUVRE D'UNE POLITIQUE DE RETOUR A LA TERRE FONDÉE SUR L'INSTALLATION DES JEUNES EN MILIEUX RURAUX ET L'AMORCE CONSEQUENTE D'UNE REFORME DU SYSTEME DE PROPRIETE FONCIERE. L'ENJEU EST DE TAILLE PUISQUE LA C.I. CONNAIT UN TAUX DE CROISSANCE DEMOGRAPHIQUE DE 3.6%, UN DES PLUS ELEVE D'AFRIQUE, CAUSE PARTIELLEMENT PAR UNE FORTE MIGRATION (0.5%) DES PAYS DU SAHEL. LA COTE D'IVOIRE EXERCE MALGRE TOUT UN POUVOIR DOMINANT SUR LA REGION. ELLE S'OFFRE COMME UN POLE DE DVLPMNT ECONOMIQUE POUVANT NOUS PERMETTRE DE SE POSITIONNER PR LES ANNEES A VENIR DS DES SECTEURS OU, DS LA REGION, NOS COMPETENCES DEVIENNENT DE PLUS EN PLUS RECONNUES. L'APPROCHE TRADITIONNELLE DE "MKTG NORD-AMERICAIN" S'APPLIQUE MAL DS TOUTE ECONOMIE TIERS-MUNDISTE OU L'OFFRE DE FINANCEMENT COMPETITIF REVET AUTANT D'IMPORTANCE QUE LA MISE EN VALEUR DE TOUTES LES QUALITES DU PRODUIT. OR LES CONDITIONS PRESENTES DE L'ECONOMIE DE LA CI RENDENT DIFFICILE UNE REVISION DE LA POLITIQUE DES CREDITS A L'EXPRTN DE LA SEE. A COURT ET MOYEN TERME NOS EXPRTNS RESULTERONT DONC ESSENTIELLEMENT DU FINANCEMENT DES IFI, DE LA LDC, DE LA BOAD OU DES INVSTMTS PRIVES. DEPUIS 1986, NOS ECHANGES COMMERCIAUX (ENVIRON \$23.5 M CHAQUE ANNEE) ONT ETE LEGEREMENT FAVORABLES A LA C.I. LA NATURE ET L'IMPORTANCE DE NOS EXPRTNS ONT RELIEES A LA REALISA'N DE PROJUS SPECIFIQUES RESULTANT D'ARRANGEMENTS FINANCIERS PONCTUELS. NOS

RPT81

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: ABIDJAN

Country: IVORY COAST

STATISTIQUES A L'EXPRTN DOIVENT DONC TOUJOURS TENIR COMPTE D'UN CERTAIN DECALAGE PAR RAPPORT AUX DECISIONS D'ORDRE FINANCIER. DS UN TEL CON- TEXTE, NS COMPTONS SUSCITER/ENCOURAGER L'ETABLISSEMENT DE PARTENARIATS EN "J.V." DS DES PROJS PRIORITAIRES RETENUS DS LES GRANDES AXES DE DVLPMT SECTION D'AIDE ET DE MAINTENIR UNE LIAISON QUOTIDIENNE AVEC LA BAD AFIN D'ORIENTER LES EFFORTS DE MKTG. DE NOS FIRMES, NS ALLONS DEVELOPPER DES PROG. D'ACTIVITES PROMO'LES EN : (1)INFORMATIQUE (USINE D'ASSEMBLAGE/PROD'N DE LOGICIELS REPODANT AUX BESOINS DE GESTIUN MUNICIPALE, SCOLAIRE/SANTE INCLUANT GESTION DES INVENTAIRES/FOURNITURES MEDICALES);(2)TELEPHONIE RURALE; (3)DVLPMT ENERGETIQUE (GENERA'N/DISTRIBU'N/FORMA'N/GESTION D'EQUI- PE D'ENTRETIEN Y INCLUS FOURNITURE D'EQPT DE MAINTENANCE);(4)FOURNITURE D'EQPT FORESTIER & MINIER;(5)TRANSPORT EN COMMUN FERRUVIAIRE ET ROUTIER (I.E. EN GESTION/FORMA'N/ENTRETIEN/EQPT). NS FAVORISERONS AUSSI LA PART'N CDNE AU DVLPMT DE COOPERATIVES FINANCIERES VISANT A GENERER L'EPARGNE ET L'INVTMT LOCAL NECESSAIRE PR FAVORISER UNE PLUS GRANDE PART'N DU SECTEUR PRIVE DS LE DVLPMT DE L'ECONOMIE. LES ECONOMIES DES 5 AUTRES PAYS DE NOTRE TERRITOIRE RESTENT FAIBLES ET NE JUSTIFIENT DE NOTRE PART QU'UN ROLE REACTIF OU DES INTERVENTIONS PONCTUELLES. LES POSSIBILITES OFFERTES SE LIMITENT A PEU PRES UNIQUEMENT AUX PROJS FINANCES PAR LES ORGANISMES MUL- TILATERAUX OU A LA FOURNITURE DE SERVICES ET EQPTS A TRAVERS LES LIGNES DE CREDIT DE L'ACDI. COMME CE FUT LE CAS AU COURS DES QUELQUES DERNIERES ANNEES, LA BANQUE AFRICAINE DE DVLPMT (BAFD) CONTINUE DE CONNAITRE UNE CROISSANCE REMARQUABLE TANT AU NIVEAU DU NOMBRE DE PROJETS QU'ELLE FINANCE QU'AU NIVEAU DE LA VALEUR DE CES PROJETS. LE POTENTIEL QUE REPRESENTENT LES PROJETS AINSI FINANCES POUR LES EXPORTATEURS CANADIENS EST ENCORE MAL EXPLOITE. LES RESULTATS PRELIMINAIRES PORTANT SUR LES DECAISSEMENTS PAR PAYS D'ORIGINE INDIQUENT QU'EN 1987 LA PERFORMANCE CANADIENNE FUT SEMBLA- BLE A CELLE DE 1986. COMME PAR LE PASSE, LA BAFD DEMEURE POUR NS UN SEC- TEUR D'ACTIVITES PRIORITAIRE AUQUEL SERA CONSACRE 90% DU TEMPS D'UN DES AGENTS COMMERCIAUX CANADIENS. DES EFFORTS ORIENTES SPECIFIQUEMENT POUR ENCOURAGER ET APPUYER LES ENTREPRENEURS ET FOURNISSEURS D'EQPT SERONT MAINTENUS. GRACE A L'INSTALLATION DU SYSTEME WIN ET A LA CREATION D'UN SYSTEME DE SUIVI INFORMATISE DES PROJETS DE LA BAFD, NS COMPTONS PLUS QUE JAMAIS DIFFUSER AUX COMPAGNIE CDNES LES RENSEIGNEMENTS SUR LES OCCASIONS DE SOUMISSIIONNER QUE SE PRESENTENT. ENFIN, EN RAISON DU SORT ENCORE INCER- TAIN RESERVE AU FONDS CDN D'ASSIST. TECH. A PARTIR DE '88, IL CONVIENT DE NS PENCHER SUR LES AUTRES MOYENS A NOTRE DISPOS'N PR PENETRER CERTAINS MAR- CHES AFRICAINS/POSITTUNNER LES FIRMES CDNES FACE A DES CONCURRENTS SOUVENT MIEUX ETABLIS.

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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. ADVANCED TECH. PROD. & SERV
EFFORT DE MKTG DEJA BIEN ENTREPRIS EN INFORMATIQUE, APPUYER PERCEE/
RECONNAISSANCE GRANDISSANTE DE NOTRE EXPERTISE DS DOMAINES DE GESTION/
PROD'N DE LOGICIELS (MUNICIPALE, SCOLAIRE/SANTE) & PAR EFFET D'ENTRAI-
NEMENT FOURNITURE D'EQPT RELIE A CES SECTEURS; SATISFAIRE BESOINS LOC-
AUX JUGES PRIORITAIRES PAR GOUV. (C.I. EST LE + INFORM. D'AFRIQUES, 1.2%
2. FOREST PRODUCTS, EQUIP, SERVICES
SECTEUR PRIVILEGIE DU PROG. APD, CONSOLIDA'N/SUIVI DE RECENTS ACHATS DE
MACHINERIE AGRICOLE S'IMPOSE, PRIORITE DU GOUV. A DEVELOPPER COOP.; DE
FOREST./ACTIVITES AGRICOLES + RECONNAISSANCE DE NOS REALISA'NS/EXPER-
TISE DS DOMAINE PEUVENT PERMETTRE OPPORTUNITE PR SRVCS DE CONSULTANTS
+ FOURNITURE DE PETIT EQPT FORESTIER/SCIERIE (UNITE MOBILE).
3. POWER & ENERGY EQUIP. & SERV.
IDENTIFIER CRENEAUX OFFERTS PAR PROG. DVLPMT ENERGETIQUE PR COMPLETER/
CONSOLIDER DISTRIBU'N/ELECTRIFICA'N RURALE EN COURS + PAR RESULTATS DE
PROG. D'ASSIST. FINANCIERE MULTILATERALE "AJUSTEMENT STRUCTUREL" RE:
REHABILITA'N, ENTRETIEN + FORMA'N A EECI) & BILATERALE (RE: PLAN NAT'L DE
L'ENERGIE) DU COOP. IND. (RE: REACTUALISATION D'ETUDE SUR BARRAGE SOUBRE).
4. MINE, METAL, MINERAL PROD & SRV
DVLPMT MINIER IMMINENT PAR INTERET CDN + ENGUEMENT RECENT DE PROSPEC-
TEURS MINIERES CDNS & INTERET DU GOUV. PR SECTEUR QUI Y VOIT SOURCE DE
"SECOND SOUFFLE" PR CONTINUER DEVELOPPEMENT ECONOMIQUE DU PAYS EN EX-
PLOITANT RICHESSES MINERALES PAR INVESTISSEMENTS PRIVES EN CO-ENTRE-
PRISES, CE QUI PERMETTRE FOURN. D'EQPT/MACHIN./SRVCS CONNEXES MINIERES.

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

1. ADVANCED TECH. PROD. & SERV
2. INDUSTRIAL MACHIN, PLANTS, SERV.
3. ADVANCED TECH. PROD. & SERV
4. INDUSTRIAL MACHIN, PLANTS, SERV.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ABIDJAN

Market: IVORY COAST

Sector : ADVANCED TECH. PRD. & SERV

Sub-Sector: TELECOM, DATACOM, SAT, SPACECOM

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	0.00 \$M	0.00 \$M	5.00 \$M	10.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.00 \$M	1.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	1.00 %

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

Major Competing Countries	Market Share
FRANCE	100.00 %

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

Products/services for which there are good market prospects:

1. STATIONS POUR RADIO DE TELEPHONIE RURALE PAR TRANS
2. CENTRAL TELE PIECES DE RECHANGE/FORMATION
3. UNITE MOBILE DE RADIO-TELEPHONE

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Import duties are low
- Aggressive marketing
- PEMO support
- Provincial export promotion
- CIDA programs
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- Competitive Canadian financing

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RPTCL

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
- IMPORTANCE DE CHOISIR REP. LOCAL
- RECONNU DANS LE MILIEU.

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

Activity: OBTENIR PLUS D'INFO SUR PLAN DIRECTEUR NATIONAL DES TELECOM
Expected Results: IDENTIFICATION DES BESOINS EN EQPT INDICATION DU CALENDRIER
PREVU POUR INSTALLATION DES SYSTEMES.

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

Activity: FAIRE INVENTAIRE DES BESOINS EN EQPT DE TELE RURALE DANS
Expected Results: ALERTER INDUSTRIE DU CLAENDRIER POSSIBLE DES AGI

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ABIDJAN

Market: IVORY COAST

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

SOUMISSION POUR RADIOS-
TELEPHONES

Approximate Value: 40 M\$
Financing Source : OTHER
IBRD - World Bank
Contact : AMBASSADE DU CANADA

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ABIDJAN

Market: IVORY COAST

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: COMPUTERS HARD/SOFTWARE & COMP

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	11.40 \$M	12.00 \$M	13.00 \$M	15.00 \$M
Canadian Exports	0.20 \$M	0.00 \$M	0.10 \$M	0.30 \$M
Canadian Share of Market	1.80 %	0.00 %	0.80 %	2.00 %

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

Major Competing Countries Market Share

UNITED STATES OF AMERICA	35.00 %
FRANCE	25.00 %
JAPAN	0.00 %
ITALY	0.00 %

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

Products/services for which there are good market prospects:

1. LOGICIELS
2. MICRO-ORDINATEURS
3. SERVICE DE GESTION/FORMATION EN INFORMATIQUE DANS

Factors contributing to current successful Canadian exports:

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

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ABIDJAN

Market: IVORY COAST

Factors for Canadian exports not reaching market potential:

- Restrictive standards
- Non-competitive pricing
- Lack of promotion and advertising
- Non-competitive financing
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored
- NECESSITE DE
- TRJPCALISER TOUS
- PRESENCE LOCALE PERMANENTE EN J.v.
- DE PREFERENCE POUR MIEUX COMPRENDRE

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

Activity: OBTENIR PLUS D'INFO SUR PLAN DIRECTEUR NATIONAL D'INFORMATIO
Expected Results: I.D. DES SECTEURS PRIORITAIRES PREVUS, MEILLEUR APPUI/
INTRODUCTION A DONNER AUX FOURNISSEURS CDNS.

Activity: I.D. DES PRENEURS DE DECISION DANS SECTEURS RETENUS COMME

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

Activity: PARTICIPATION AUX 6 IEME JOURNEES AFRICAINES DE L'INFO.
Expected Results: PROMOTION DE NOTRE EXPERISE AUPRES DECIDEURS AFRICAINS &
RENFORCER NOTRE INFLUENCE DANS SECTEUR

Activity: PARTICIPATION D'ACHETEURS/UTILISATEURS IVOIRIENS AU SIIM
Expected Results: FAMILIARISATION AVEC NOS PRODUITS & EXPERTISE

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DEPARTMENT OF EXTERNAL AFFAIRS

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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: APPUYER PROPOSITION DE STAGE AU SGI D'EXPERTS/PERSUNNES
Expected Results: MIEUX NOUS POSITIONNER POUR MIEUX APPECIER DEVELOPMENTS
FUTURS

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

INFORMATISATION SCOLAIRE
NATIONALE

Approximate Value: 80 M\$
Financing Source : DOM - Domestically funded
Contact : AMBASSADE DU CANADA

INFORMATISATION DES GESTIONS
DES MUNICIPALITES/COMMUNES

Approximate Value: 0 M\$
Financing Source : DOM - Domestically funded
Contact : AMBASSADE DU CANADA

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ABIDJAN

Market: IVORY COAST

Sector : POWER & ENERGY EQUIP. & SERV.

Sub-Sector: TRANSMISSION

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	113.00 \$M	120.00 \$M	120.00 \$M	130.00 \$M
Canadian Exports	4.00 \$M	4.00 \$M	2.20 \$M	4.00 \$M
Canadian Share of Market	3.50 %	3.30 %	1.80 %	3.00 %

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 %

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

Products/services for which there are good market prospects:

1. EQPT DE TRANS/DISTRIB/CONVERTISSEURS DE PHASE/EQPT
2. SERVICES DE CONSULTANT EN FORMATION/INFO EN GESTIO
3. MIEUX NOUS POSITIONNER SI MISE EN CHANTIER DU BARR
4. SYSTEME A COUPLAGE CAPACITIF (SCC)

Factors contributing to current successful Canadian exports:

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

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ABIDJAN

Market: IVORY COAST

Factors for Canadian exports not reaching market potential:

- Restrictive standards
- Non-competitive pricing
- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored
- DIFFERENTS PLUS BASE
- SUR CEUX ACCEPTES EN
- LENTEUR BUREAUCRATIQUE LOCALE &
- CONFLIT ENTRE AGENCES DE DECISION

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

Activity: FINANCEMENT DIT "PRET STRUCTUREL" DE RESTRUCTURATION DE GEST
Expected Results: PRESTATION DE SERVICE DE CONSULTANT EN GESTION/INFORMATIQUE
POURRAIT AIDER A MIEUX NOUS POSITIONNER POUR VENTES FUTURES

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

Activity: MISE EN EXECUTION DE SECTEURS DU PLAN ENERGETIQUE GLOBAL
Expected Results: PRESTATION DES SERVICES DE CONSULTANT FINANCEE PAR ACDI
VA NOUS AIDER A MIEUX NOUS POSIT POUR LES DEV FUTURS QUE

Activity: REVISION DES ETUDES D'AVANT PROJET & DOCUMENTS D'APPEL

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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 still in the planning stage which provide opportunities for Canadian suppliers:

SUITE AUX ENGAGEMENTS DES IFI	Approximate Value:	300 M\$
A DONNER SUR 5 ANS DES (PASE)	Financing Source :	OTHER
	Contact	: AMBASSADE DU CANADA

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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 (Estimated)	Next Year (Projected)
Market Size	0.00 \$M	3.20 \$M	3.00 \$M	3.50 \$M
Canadian Exports	0.00 \$M	0.20 \$M	0.20 \$M	0.30 \$M
Canadian Share of Market	0.00 %	6.80 %	6.60 %	8.50 %

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

Major Competing Countries Market Share

BRAZIL	25.00 %
ITALY	20.00 %
FRANCE	12.00 %
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. EQPT FORESTIER
2. UNITE MOBILE DE SCIERIE
3. SERVICE DE CONSULTANT POUR FORMATION & GESTION EN
4. EXPERTISE & TRANSFER DE TECH POUR CREATION/APPUI

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Import duties are moderate
- PEMU support
- Provincial export promotion
- CIDA programs
- Strong sectoral capability in Canada

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ABIDJAN

Market: IVORY COAST

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
- Performance of local agent or representative
- CHOIX JUDICIEUX DE REP. LOCAL PEUT
- DEVENIR DETER POUR EVOLUTION FUTURE

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 CREAT.
Expected Results: IDENTIFICATION DES BESOINS CIBLAGE POUR CIES CDNES.

Activity: RECHERCHE DU CALENDRIER D'EXECUTION DE PROJ/REPRDD DES SEMIS
Expected Results: IDENTIFICATION DES BESOINS CIBLAGE POUR CIES CDNES.

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

Activity: MISSION EXPLORATOIRE DE PROD DE PETIT EQPT D'EXPLOITATION
Expected Results: IDENTIFICATION DE REP. LOCAL/DISTRIBUTEURS POTENTIELS & PRISE DE CONTACT AVEC DECIDEURS LOCAUX.

Activity: FOIRE AGRICOLE INTERNATIONAL D'ABIDJAN
Expected Results: PROMOTION D'EXPERTISE CDNE DANS DOMAINE (AGRICOLE/FORESTERIE).

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 PROGRAMME APD DANS LE DOMAINE
Expected Results: EXPLDITER SOURCE DE FINANCEMENT RECOMMANDER PARTENARIAT POSSIBLE.

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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 still in the planning stage which provide opportunities for Canadian suppliers:

PRET SECTORIEL FORESTIER
(COMPRENANT ETUDES & ACHATS

Approximate Value: 135 M\$
Financing Source : IBRD - world Bank
Contact : AMBASSADE DU CANADA

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ABIDJAN

Market: IVORY COAST

Sector : MINE, METAL, MINERAL PRD & SKV

Sub-sector: EQUIPMENT AND MACHINERY

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	0.00 \$M	0.00 \$M	4.00 \$M	6.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.20 \$M	2.00 \$M
Canadian Share of Market	0.00 %	0.00 %	5.00 %	33.00 %

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

Major Competing Countries

Market Share

EUROPEAN COMMON MARKET C

50.00 %

UNITED STATES OF AMERICA

40.00 %

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

Products/services for which there are good market prospects:

1. EQPT D'EXPLOITATION
2. EQPT D'EXPLORATION
3. SERVICE D'ASSISTANCE TECHNIQUE

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Non-competitive financing
- Market prospects have not been adequately explored

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RPTC1

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: SUIVI DES RECENTS ACHATS D'EQPT D'EXPLO & ANALYSE EN LAB
Expected Results: IDENTIFICATION DE BESOINS FUTURS EN PERSONNES-RESSOURCES ET EQPT.

Activity: SUIVI SUR PROJET DE CO-ENTREPRISE CDD-IVOIRIEN POUR EXPLOITE
Expected Results: IDENTIFICATION DE BESOINS FUTURS EN PERSONNES-RESSOURCES ET EQPT.

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

Activity: ETANT DONNE IMPORTANCE DU SECTEUR EN DEV MISSION DE PROD
Expected Results: MEILLEURE IDENTIFICATION DES BESOINS FUTURES RE-AFFERMISSEMENT DES CONTACTS ETABLIS.

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ABIDJAN

Market: IVORY COAST

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

ASSISTANCE TECHNIQUE &
FOURNITURE D'EQPT.

Approximate Value: 1 MS
Financing Source : OTHER
Contact : AMBASSADE DU CANADA

Post : ABIDJAN

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Post/Contact</u>
89/06/07	MISSION FROM AFRICA TO SIM, MONTREAL MISSION IN. TO FAIR	ADVANCED TECH. PROD. & SERV T. GERVAIS
90/02/00	6E JOURNEES AFRICAINES INFO ABIDJAN INFO SOUTH. WITH GROUP	ADVANCED TECH. PROD. & SERV

RPTBI

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: ADDIS ABABA

Country: ETHIOPIA

ETHIOPIA'S ECONOMIC POTENTIAL CONTINUES TO BE HINDERED BY A NUMBER OF FACTORS: INTERNAL STRIFE, INSTITUTIONAL AND POLICY DEFICIENCIES, DROUGHT AND ECOLOGICAL VAGARIES. THE ANNUAL POPULATION GROWTH RATE AVERAGED 2.9% WITH A POPULATION OF ABOUT 46 MILLION IN 1987; ETHIOPIA IS THE THIRD MOST POPULOUS AFRICAN COUNTRY. IT IS WITH A PER CAPITA INCOME OF ABOUT 93 US\$, THE WORLD'S POOREST COUNTRY.

AGRICULTURE IS THE DOMINANT SECTOR OF THE ETHIOPIAN ECONOMY CONTRIBUTING ABOUT HALF OF GDP, 90% OF EXPORT AND 80% OF EMPLOYMENT. DESPITE EVIDENCE OF SECULAR STAGNATION AND THE TRAGIC 1984 AND 1987 DROUGHT AND FAMINE THERE IS A SUBSTANTIAL POTENTIAL FOR DEVELOPMENT OF AGRICULTURE, TO INCREASE FOOD PRODUCTION, IMPROVE AGRICULTURAL EXPORTS AND PROVIDE AGRICULTURAL RAW MATERIALS FOR DOMESTIC INDUSTRY. THESE OBJECTIVES ARE SET FORTH IN THE TEN YEAR PLAN. (THE 1.3 MILLION MT OF COMMERCIAL IMPORTS AND FOOD AID OF THE INTERNATIONAL COMMUNITY COMPENSATED FOR THE FOOD DEFICIT OF 1987-88).

THE INDUSTRIAL SECTOR, WHICH ACCOUNTED FOR ABOUT 17.3% OF GDP, IS MAINLY DEPENDENT ON LARGE SCALE OR MEDIUM SIZE STATE-OWNED ENTERPRISES WHICH DEPEND HEAVILY ON AGRICULTURAL RAW MATERIALS. THIS SECTOR IS ALSO HAMPERED BY LOW INVESTMENT, HEAVY IMPORTATION COSTS AND LACK OF SKILLED MANPOWER. THE OVERALL ECONOMY IS PRESENTLY STAGNATING. THE ONLY MAJOR IMPROVEMENT CAN COME FROM A DIVERSION OF HUMAN AND MATERIAL RESOURCES FROM THE WAR FRONT. STILL, THE ETHIOPIAN GOVERNMENT HAS DECIDED TO IMPLEMENT NEW MEASURES IN THE AGRICULTURAL SECTOR WHICH ARE SUPPOSED TO IMPROVE PRICING AND MARKETING FOR AGRICULTURAL PRODUCTS. IT IS ALSO REPORTED THAT ADDITIONAL REFORMS ARE EXPECTED WHICH WOULD EASE TRADE AND INDUSTRIAL RESTRICTIONS WITH THE HOPE OF SECURING MUCH NEEDED INVESTMENTS.

THE SHENGO APPROVED THE COUNTRY'S DEVELOPMENT PLAN AND THE NATIONAL BUDGET OF 6,043 MILLION BIRR (ONE U.S. DOLLAR EQUALS 2.07 BIRR) FOR THE 1981 ETHIOPIAN FISCAL YEAR (JULY 1988-JUNE 1989).

THE NEW BUDGET SHOWS AN INCREASE OF 1,443 MILLION BIRR OVER THE PREVIOUS TOTAL OF 4,600 MILLION BIRR.

ETHIOPIA'S DEVELOPMENT PLAN FOR 1988-89 ENVISAGES AS ITS MAIN OBJECTIVE THE RAISING OF THE GROSS DOMESTIC PRODUCT (GDP) BY 4 PER CENT, THE PRODUCTIVITY OF THE INDUSTRIAL SECTOR BY 8.5 PER CENT AND THAT OF THE SERVICES SECTOR BY 5.1 PER CENT.

A TOTAL OF 2,680 MILLION BIRR INVESTMENT IS NEEDED FOR THE IMPLEMENTATION OF THE VARIOUS ECONOMIC SECTORS OF THE DEVELOPMENT PLAN. OVER ONE-FIFTH OF THE INVESTMENT CAPITAL, OR 21.5 PER CENT, WAS ALLOCATED FOR NATURAL RESOURCES DEVELOPMENT, 13.4 PER CENT FOR INDUSTRY, 13 PER CENT FOR MINING, 11 PER CENT FOR TRANSPORT AND COMMUNICATIONS AND 10.2 PER CENT FOR ENERGY. IN PRACTICE, HOWEVER, MUCH OF THE TOTAL ALLOCATION HAS BEEN REDIRECTED TO MILITARY PURPOSES (45%).

THE TOTAL INCOME OF THE CENTRAL GOVERNMENT FOR THE FISCAL YEAR IS SET AT 4,328 MILLION BIRR, OF WHICH 3,050 MILLION BIRR IS TO BE DERIVED FROM REGULAR SOURCES OF INCOME, 309 MILLION BIRR FROM FOREIGN AID AND 972

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: ADDIS ABABA

Country: ETHIOPIA

MILLION BIRR FROM FOREIGN LOANS.

RPTBL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: ADDIS ABABA

Country: DJIBOUTI

THE COUNTRY'S ECONOMY, WITH LACK OF STATISTICAL DATA, IS VERY DIFFICULT TO INTERPRET. HOWEVER, ACCORDING TO AFDB REPORTS, DURING THE 1982-86 PERIOD, THE COUNTRY EXPERIENCED A NEGATIVE REAL GROWTH RATE OF AROUND 1.10% PER ANNUM. OVER THE SAME PERIOD AGRICULTURE AND INDUSTRY WITNESSED A SLIGHT REVIVAL OF ACTIVITY. THESE SECTORS CONTRIBUTED 5% AND 10% RESPECTIVELY TO GDP FORMATION, WHILE SERVICES CONTRIBUTED 70%. THE FRENCH MILITARY PRESENCE REMAINS AN IMPORTANT SOURCE OF FOREIGN EXCHANGE.

THE TRADE BALANCES INDICATED A GROWING DEFICIT THROUGHOUT THE 1981-85 PERIOD. THE IMPORT-EXPORT RESERVE RATIO DROPPED STEADILY FROM 61% IN 1981 TO 43% IN 1985. THIS DEFICIT IS STRUCTURAL, SINCE THE COUNTRY IMPORTS MOST OF THE COMMODITIES NEEDED FOR LOCAL CONSUMPTION. MAJOR EXPORTS CONTAIN RE-EXPORTED COMMODITIES, (LIVE ANIMALS, HIDES AND SKINS, COFFEE AND FOOD ITEMS).

PRINCIPAL IMPORTS ARE FOOD STUFFS, MACHINERY AND TRANSPORT EQUIPMENT. MAJOR TRADE PARTNERS AND BENEFICIARIES OF THE PORT ARE FRANCE, ETHIOPIA, MEDITERRANEAN COUNTRIES AND OTHER NEIGHBOURING STATES. TRADE RELATIONS WITH CANADA ARE MAINLY ATTRIBUTED TO CIDA AID PROGRAMS.

AT PRESENT, DJIBOUTI IS HEAVILY DEPENDENT ON FOOD IMPORTS, WHICH IT PAYS FOR OUT OF ITS MEAGRE RESOURCES TO MEET THE NUTRITIONAL REQUIREMENTS OF THE PEOPLE. DOMESTIC PRODUCTION HARDLY COVERS 10% OF REQUIREMENTS. WITH REGARD TO FISCAL POLICY, GOVERNMENT HAS ADOPTED A PRAGMATIC STRATEGY, MATCHING EXPENDITURES TO RESOURCES. THE AUSTERITY MEASURES TAKEN HAVE LED TO AN IMPROVED FISCAL BALANCE, DESPITE THE STRICT LIMITS AND CONSTRAINTS IMPOSED BY THE RELIEF AND CLIMATE OF THE COUNTRY.

RPT82

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 EXPORT PROMOTION PRIORITIES

Mission: ADDIS ABABA

Country: ETHIOPIA

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

1. POWER & ENERGY EQUIP. & SERV.
IN VIEW OF SOURCE OF FINANCING AND ETHIOPIAN AND NEIGHBOURING COUNTRIES PRIORITY AND CDA'S CAPABILITY IN SECTOR.
2. TRANSPORT SYS, EQUIP, COMP, SERV.
CDA HAS MAJOR SHARE IN SUPPLY OF EQPT & SERVICES TO ETHI AIRLINES WHICH HAS LONG TERM PLAN TO EXPAND ITS SERVICES TO EAST, CENTRAL AND WEST AFRICA IN MARKET DECLINING SERVICES RENDERED BY OTHER AFRICAN AIRLINES.
3. CONSTRUCTION INDUSTRY
IN VIEW OF SOURCE OF FINANCING AND CDA'S CAPABILITY IN SECTOR.
4. AGRI & FOOD PRODUCTS & SERVICE
IN VIEW OF CDA'S CAPABILITY, CIDA'S COMMITMENT AND COUNTRY'S PRIORITY.
5. ADVANCED TECH. PROD. & SERV
FOR REASONS OF SOURCE OF FINANCING AND CDA CAPABILITY IN SECTOR.

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

- | | |
|--------------------------------------|-----------------------------------|
| 1. POWER & ENERGY EQUIP. & SERV. | 4. AGRI & FOOD PRODUCTS & SERVICE |
| 2. TRANSPORT SYS, EQUIP, COMP, SERV. | 5. CONSTRUCTION INDUSTRY |
| 3. ADVANCED TECH. PROD. & SERV | |

RPTCL TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM
 89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ADDIS ABABA

Market: ETHIOPIA

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: SERVICES INCLUDING CONSULTING

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	0.00 \$M	239.00 \$M	179.00 \$M	58.40 \$M
Canadian Exports	0.00 \$M	82.00 \$M	52.00 \$M	20.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	0.00 %

Major Competing Countries

Market Share

SWEDEN	0.00 %
AUSTRALIA	0.00 %
UNITED STATES OF AMERICA	0.00 %
UNITED KINGDOM	0.00 %
FINLAND	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. FORESTRY DEVT.
2. CONSULTANCY SERVICES
3. AGRICULTURAL EQPT
4. IRRIGATION

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Non-competitive financing
- Market prospects have not been adequately explored

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ADDIS ABABA

Market: ETHIOPIA

Sector : ADVANCED TECH. PRDD. & SERV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	151.00 \$M	256.50 \$M	0.00 \$M	0.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.00 \$M	0.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	0.00 %

Major Competing Countries

Market Share

JAPAN	0.00 %
AUSTRALIA	0.00 %
SWEDEN	0.00 %
FINLAND	0.00 %
UNITED KINGDOM	0.00 %
UNITED STATES OF AMERICA	0.00 %

Products/services for which there are good market prospects:

1. TELECOM EQPT
2. SOLAR POWER GENERATOR
3. RADIO EQPT

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Non-competitive financing
- Market prospects have not been adequately explored

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ADDIS ABABA

Market: ETHIOPIA

Sector : POWER & ENERGY EQUIP. & SERV.

Sub-Sector: HYDRO

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	0.00 \$M	62.00 \$M	77.00 \$M	120.00 \$M
Canadian Exports	0.00 \$M	1.60 \$M	6.00 \$M	19.80 \$M
Canadian Share of Market	0.00 %	2.50 %	7.79 %	16.50 %

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

Major Competing Countries	Market Share
ITALY	50.00 %
JAPAN	20.00 %
UNITED KINGDOM	5.00 %
FINLAND	15.00 %
UNION OF SOVIET SOC REP	7.50 %

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

Products/services for which there are good market prospects:

1. ENGINEERING SERVICES
2. POWER GENERATING EQPT
3. POWER TRANSMISSION EQPT
4. CONSULTANCY SERVICES
5. TRAINING

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Non-competitive financing
- Market prospects have not been adequately explored

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ADDIS ABABA

Market: ETHIOPIA

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

Activity: POWER TRANSMISSION
Expected Results: CDN FIRMS PREQUALIFIED

Activity: HYDRO STUDY
Expected Results: RESPONSE FM CDN FIRM AWAITED

Activity: CONSULTING AND OTHER SERVICES
Expected Results: CDN FIRMS WORKING ON PROJECT

RPTCI TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM
89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ADDIS ABABA

Market: ETHIOPIA

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: AERUSPACE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	149.00 \$M	100.00 \$M	49.00 \$M	0.00 \$M
Canadian Exports	0.00 \$M	19.00 \$M	20.00 \$M	0.00 \$M
Canadian Share of Market	0.00 %	19.00 %	0.40 %	0.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	0.00 %
GERMANY WEST	0.00 %
ITALY	0.00 %

Current Status of Canadian
exports in this sector/subsector: Market share declining

Products/services for which there are good market prospects:

1. AIRCRAFT SALES
2. PARTS SALES & SERVICES

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Non-competitive financing
- Limited appreciation/understanding of distribution system

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ADDIS ABABA

Market: ETHIOPIA

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

- Activity: AIRCRAFT ASSEMBLY
- Activity: HANGAR MAINTENANCE
- Activity: AIRCRAFT SALES & PARTS
- Activity: OTHER MAINTENANCE SERVICES

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ADDIS ABABA

Market: ETHIOPIA

Sector : CONSTRUCTION INDUSTRY

Sub-Sector: ARCHITECT, CONS, CONSUL, SERV

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	0.00 \$M	200.00 \$M	95.00 \$M	105.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	2.10 \$M	0.50 \$M
Canadian Share of Market	0.00 %	0.00 %	2.21 %	0.47 %

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

Major Competing Countries

Market Share

ITALY	0.00 %
GERMANY WEST	0.00 %
JAPAN	0.00 %
UNITED KINGDOM	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. ROAD CONSTRUCTION MACHINERY
2. SOIL COMPACTORS

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Non-competitive financing
- Market prospects have not been adequately explored

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ADDIS ABABA

Market: ETHIOPIA

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

Activity: SALES OF MACHINERY
Expected Results: UNDER NEGOTIATION

Activity: SPARE PARTS
Expected Results: UNDER NEGOTIATION

RPT81

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: ALGIERS

Country: ALGERIA

L'ALGERIE A ETE CONTRAINTE DEPUIS 1986 A REVISER ET RESTRUCTURER SES PLANS D'INVESTISSEMENTS ET D'IMPORTATIONS EN FONCTION DE LA BAISSSE DES PRIX INTERNATIONAUX DE SES EXPORTATIONS PRINCIPALES, LES HYDROCARBURES ET LEURS DERIVES. LA REVISION A PORTE ESSENTIELLEMENT SUR UNE RATIONALISATION DES BESOINS COURANTS PLUTOT QU'UN COUP DE BARRE MAJEUR AUX GRANDES LIGNES DU PLAN DES INVESTISSEMENTS ET DU DEVELOPPEMENT ECONOMIQUE. CES CHANGEMENTS SE SONT FAITS, PREMIEREMENT PAR DES PROJETS REEVALUES, VOIRE REDUITS, PLUS MODESTES, OU REECHELONNES DANS LE TEMPS; DEUXIEMEMENT PAR UNE INTEGRATION PLUS PUSSEE DES CAPACITES D'INGENIERIE ET DE FABRICATION DOMESTIQUES EXISTANTES (DONC PLUS DE PROJETS CLEF-EN-MAIN, ET RECHERCHE CONSTANTE D'APPORTS TECHNOLOGIQUES); TROISIEMEMENT, PAR UN GRAND EFFORT VERS L'AUGMENTATION DE LA GAMME ET DE LA QUALITE DES PRODUITS D'EXPORTATION POUR DIVERSIFIER LES SOURCES DE DEVISSES; ET ENFIN, PAR LE RECOURS ACCRU AUX SOURCES DE FINANCEMENT MULTILATERALES (BM, BAFD, ETC..).

LE GOUVERNEMENT A EGALEMENT ACCELERE, DES 1986, LA MISE EN PLACE DE REFORMES STRUCTURELLES ECONOMIQUES ET COMMERCIALES SIGNIFICATIVES PROMETTANT UN CHANGEMENT PROFOND A PLUS LONG TERME DANS L'APPROCHE ECONOMIQUE COMMERCIALE ET VISANT ENTRE AUTRES L'AUTONOMIE DES ENTREPRISES ET DES BANQUES, LA LIMITATION DU MONOPOLE D'ETAT SUR LE COMMERCE EXTERIEUR, ET L'ACCEPTATION DANS CERTAINS CAS DES INTERMEDIAIRES, ETC.

CES REVISIONS IMPLIQUENT POUR LES EXPORTATEURS CANADIENS UNE REORIENTATION D'APPROCHE FACE AU MARCHE, NECESSITANT POUR REUSSIR UN ELARGISSEMENT DES APPORTS EN COOPERATION INDUSTRIELLE, EN TRANSFERTS DE TECHNOLOGIE, ET EN FORMATION, CES VOLETS POUVANT ETRE SOUVENT APPUYES PAR LES PROGRAMMES AUTANT DE L'ACDI QUE DE LA SEE.

IL Y A EU EGALEMENT, DEPUIS DEUX ANS, UNE FORTE CROISSANCE DANS L'ACTIVITE DE LA BANQUE MONDIALE ET DE LA BANQUE AFRICAINE DE DEVELOPPEMENT, OFFRANT AUJOURD'HUI AUX SOCIETES CANADIENNES UN "PIPELINE" INTERESSANT DE PROJETS APPROUVES OU EN VOIE DE L'ETRE DANS DE MULTIPLES DOMAINES.

PAR AILLEURS, LES CINQS PAYS DU GRAND MAGHREB: ALGERIE, LIBYE, MAROC, MAURITANIE ET TUNISIE, ONT MIS EN DEUVRE UNE ACTIVITE VISANT UNE COOPERATION ECONOMIQUE PROGRESSIVE. BIEN QUE CES DISCUSSIONS DEMEURENT ENCORE AU NIVEAU MACRO-ECONOMIQUE, ON PEUT SE PERMETTRE D'ANTICIPER, A MOYEN TERME, UNE CERTAINE COORDINATION DES POLITIQUES SECTORIELLES D'INVESTISSEMENT ET UNE INTERACTION ECONOMIQUE PAN-MAGHREBINE DONT L'EXPORTATEUR AVERTI POURRA SANS DOUTE TIRER PROFIT.

LA MISSION IDENTIFIE ACTUELLEMENT SIX SECTEURS PRIORITAIRES POUR LE DEVELOPPEMENT DU MARCHE ALGERIEN: TRANSPORTS (AVIATION CIVILE/FERROVIAIRE), AGRICULTURE ET PRODUITS VETERINAIRES, EDUCATION ET SANTE, TELECOMMUNICATIONS ET INFORMATIQUE, PETROLE ET GAZ; ET EQUIPEMENT MINIER. CES PRIORITES N'EXCLUENT PAS LES POSSIBILITES DE VENTE DANS D'AUTRES SECTEURS, MAIS SIGNALENT UNE APPROCHE PLUS INTEGREE ET CONCENTREE DE NOS EFFORTS VISANT CES SECTEURS PAR LE BIAIS D'ACTIVITES D'ENSEMBLE, EG: MISSIONS COMMERCIALES ET SEMINAIRES TECHNIQUES, ET/OU COORDINATION AVEC D'AUTRES PROGRAMMES DES GOUVERNEMENTS FEDERAL (E.G. ACDI) ET PROVINCIAUX.

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RPTBL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: ALGIERS

Country: ALGERIA

CEPENDANT, UN ELEMENT D'INCERTITUDE PERSISTE AU MOMENT D'ECRIRE CET APERCU ECONOMIQUE (27-10-88) CONCERNANT LES FUTURES LIGNES DIRECTRICES DE L'ECONOMIE ET DES PLANS D'INVESTISSEMENT. DES REFORMES POLITIQUES IMPORTANTES SONT PROPOSEES ACTUELLEMENT PAR LE GOUVERNEMENT TOUCHANT ENTRE AUTRES LA CONSTITUTION, LE ROLE DU PARTI ET LA DIVERSIFICATION DE L'EXECUTIF. RESTE A SAVOIR DANS QUELLE MESURE CECI AFFECTERA LES LIGNES DIRECTRICES DU PLAN ET LES ECHEANCIERS DES REFORMES ECONOMIQUES DEJA EN COURS.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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. AGRI & FOOD PRODUCTS & SERVICE
 AGRICULTURE ET VETERINAIRE: SECTEUR DEVENU STRATEGIQUE DEPUIS BAISSSE DES PRIX DU PETROLE. ALGERIE IMPORTE PLUS DE 60% DE SES BESOINS ALIMENTAIRES. LE CDA BIEN PLACE COTE QUALITE, PRIX ET FINANCEMENT (SEE ASSURANCE ET GARANTIE). STRATEGIE CDM NECESSAIRE PR COMBATTRE SUBVEN'S CEE ET ETATS-UNIS DS DEUX OU TROIS PRODUITS IMPORTANTS POUR LE CANADA.
2. ADVANCED TECH. PROD. & SERV
 COMMUNICA'NS: ALGERIE ENVISAGE DE MODERNISER SES SYST. DE TELECOM. ET LE POTENTIEL DEMEURE INTERESSANT PR LES SOC. CDNES DONT LES FORTES CAPACITES SONT BIEN CONNUES. SECTEUR TRES ACTIF PR LE CDA OU LES CONTACTS SONT EXCELLENTS. INFO.: SECTEUR EN PLEINE CROISSANCE ET OUVRIRA NOUVELLES AVENUES AUX SOCIETES PERSEVERANTES.
3. TRANSPORT SYS, EQUIP, COMP, SERV.
 TRANSPORTS: DEUX SOUS-SECTEURS STRATEGIQUES. AERONAUTIQUE: SUITE A PLUSIEURS ACTIVITES DE PROMOTION, CAPACITES CDNNES SONT TRES CONNUES ET APPRECIEES. FERROVIAIRE: LES AUTORITES ALGRNES ONT RECEMMENT MIS UNE PRIORITE A LA RENTABILISATION ET L'EFFICACITE DU CHEMIN DE FER. LE CDA EST BIEN PLACE PR REPONDRE AUX BESOINS SPECIF. ALGRNS DS LES 2 DOMAINES
4. EDUCATION, MEDICAL, HEALTH PROD
 EDUCA'N, MEDICINE & SANTE: 2 DOMAINES IMPORTANTS DU CROISSANCE RAPIDE DE LA POPULA'N. L'EDUCA'N DEMEURE PRIORITAIRE A TOUS LES NIVEAUX SANS OUBLIER NOTRE CAPACITE A OFFRIR DES SRVCS EN FRANCAIS. SANTE EST EGALLEMENT SECTEUR TRES IMPORTANT PR RAISONS SOCIALES & LE CDA A LES COMPE'TENCES DS DOMAINE D'EDPTS & PROD. PHARMA. PR PERCER CE MARCHÉ.
5. OIL & GAS EQUIPMENT, SERVICES
 PETROLE/GAZ: 97% DES REVENUS ALGERIENS PROVIENNENT TOUJOURS DE CE SECTEUR. AUSSI, LA DEMANDE ALGERIENNE EN EQUIPEMENTS, PIECES, ETC SE MAINTIENDRA A L'AVENIR. PAR AILLEURS, LES ENTREPRISES NATIONALES DEUVRANT DANS CE SECTEUR SONT PLUS RENTABLES ET ONT SOUVENT PLUS FACILEMENT ACCES AUX SOURCES DE FINANCEMENT MISE A LEUR DISPOSITION.
6. MINE, METAL, MINERAL PROD & SRV
 MINIER: LE CANADA CONTINUE DEPUIS PLUSIEURS ANNEES A ETRE PRESENT DANS SECTEUR DE SERVICES ET EQUIPEMENTS MINIER. L'ALGERIE VEUT DIVERSIFIER SES REVENUS HORS HYDROCARBURES ET CE SECTEUR EST TRES IMPORTANT.

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

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ALGIERS

Market: ALGERIA

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	610.00 \$M	595.00 \$M	580.00 \$M	566.00 \$M
Canadian Exports	64.00 \$M	25.00 \$M	40.00 \$M	50.00 \$M
Canadian Share of Market	10.00 %	4.00 %	7.00 %	9.00 %

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

Major Competing Countries Market Share

UNITED STATES OF AMERICA	30.00 %
FRANCE	25.00 %
BELGIUM	20.00 %
GERMANY WEST	10.00 %
UNITED KINGDOM	13.00 %
SWITZERLAND	2.00 %

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

Products/services for which there are good market prospects:

1. PEAUX ET CUIRS
2. LAIT
3. POIS, LENTILLES, HARICOTS BLANCS
4. HUILE DE COLZA
5. PRODUITS VETERINAIRES
6. SUIF
7. POMME DE TERRE
8. OEUF DE POISSONS ET DINDONS
9. VACHES LAITIERES
10. MACHINERIE AGRICOLE
11. IRRADIATEUR

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ALGIERS

Market: ALGERIA

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- PEMU support
- Fairs and Missions support
- Provincial export promotion
- CIDA programs
- Competitive pricing
- 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
- LE CDA FAIT FACE A
- LA COMPETI'N SUBVEN.
- LE CDA FAIT FACE A LA COMPETITION
- DIRECTEMENT SUBVENT. PAR LES PAYS

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

Activity: CONTINUER LES CONSULTATIONS AVEC LES EXPORTATEURS.
Expected Results: OBTENIR DE NOUVEAUX MARCHES.

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

Activity: FOIRE AGRICOLE AVEC SEMINAIRE DE POMME DE TERRE DE SEMENCE
Expected Results: PENETRER LE MARCHÉ.

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RPTCL

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 AGRICOLE ET BETAAIL (BOVIN LAITIER)
Expected Results: PENETRATION DU MARCHE

Activity: REVOIR PROGRAMME POUR LA QUALITE DES OEUFs DE POUSSINS
Expected Results: PENETRATION DU MARCHE, VOIR NIVEAU D'ECLOSION ET DE FERTILITE

Activity: MISSION-ET SEMINAIRE TECHNIQUE POMME DE TERRE.

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

SELON LES A.D.I.

Approximate Value: 0 M\$

Financing Source :

Contact : D. J. KANE/A. ZEHANI

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ALGIERS

Market: ALGERIA

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	500.00 \$M	500.00 \$M	450.00 \$M	400.00 \$M
Canadian Exports	10.00 \$M	10.00 \$M	8.00 \$M	20.00 \$M
Canadian Share of Market	2.00 %	2.00 %	1.70 %	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 %
UNITED STATES OF AMERICA	15.00 %
SWEDEN	15.00 %
GERMANY WEST	10.00 %
FRANCE	10.00 %

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

Products/services for which there are good market prospects:

1. TELEPHONIE RURALE
2. PABX
3. LIGNES TELEPHONIQUES
4. TELEPHONES
5. BUREAUTIQUE
6. INFORMATIQUE (EQUIPEMENT ET SERVICES)
7. INFORMATISATION DE SYSTEMES
8. TRANSMISSION DE DONNEES
9. INFORMATISATION ARABE/LATIN
10. SERVICES/FORMATION

RPTCL

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
- PEMU support
- Fairs and Missions support
- CIDA programs
- Strong sectoral capability in Canada
- Competitive Canadian financing
- Willingness of exporters to invest/joint venture in territory

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- LA CONNAISSANCE ET L'USAGE DU
- FRANCAIS SONT FORTEMENT RECOMMANDES

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

Activity: FOIRE
 Expected Results: MAINTIEN DE PRESENCE CANADIENNE

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

Activity: VISITES AU CANADA DES PRENEURS DE DECISIONS ALGERIENS.
 Expected Results: MAINTENIR RELATIONS. NEGOCIATION DE CONTRACTS. VENTES EVENTUELLES.

Activity: VISITE ALGERIENNE AU CANADA A HAUT NIVEAU
 Expected Results: FAMILIARISATION - COOPERATION PLUS INTENSE

Activity: VISITE CANADIENNE EN ALGERIE A HAUT NIVEAU
 Expected Results: SOUTIEN DES ACTIVITES. PROMOTION GENERALE

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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 still in the planning stage which provide opportunities for Canadian suppliers:

SELDN LES A.D.I.

Aporoximate Value: 0 M\$
Financing Source :
Contact : J.H. DESJARDINS

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RPTC1 TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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 (Estimated)	Next Year (Projected)
Market Size	100.00 \$M	125.00 \$M	120.00 \$M	431.00 \$M
Canadian Exports	1.50 \$M	1.50 \$M	2.00 \$M	40.00 \$M
Canadian Share of Market	2.00 %	2.00 %	2.00 %	9.00 %

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

Major Competing Countries	Market Share
AUSTRIA	40.00 %
FRANCE	40.00 %
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. LOCOMOTIVES
2. VOIE
3. SIGNALISATION
4. TELECOMMUNICATIONS ET INFORMATIQUE
5. FORMATION

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

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ALGIERS

Market: ALGERIA

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: MISSION FERROVIAIRE
Expected Results: PERSUADER ALGNS DE LA COMPETENCE ET COMPETITIVITE DES CANADIENS

Activity: CONTINUER PROMOTION SECTEUR FERROVIAIRE (LOCOMOTIVES ET SER)
Expected Results: VENTES EN 1989

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

Activity: PREVOIR MISSION TECHNIQUE, FERROVIAIRE AU CANADA
Expected Results: AUGMENTATION ET DIVERSIFICATION DES VENTES CONNES DANS CE SECTEUR

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

Activity: JOURNEE TECHNIQUE EN ALGERIE SECTEUR FERROVIAIRE
Expected Results: DEMONTRER QUALITE DES PRODUITS ET SERVICES CANADIENS

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ALGIERS

Market: ALGERIA

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

SELDN LES A.D.I.

Approximate Value: 0 M\$

Financing Source :

Contact : R. F. TURCOTTE/D. J. KANE

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ALGIERS

Market: ALGERIA

Sector : TRANSPORT SYS,EQUIP,COMP,SEKV.

Sub-Sector: AEROSPACE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	250.00 \$M	280.00 \$M	250.00 \$M	200.00 \$M
Canadian Exports	5.00 \$M	10.00 \$M	10.00 \$M	10.00 \$M
Canadian Share of Market	2.00 %	3.60 %	4.00 %	5.00 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	30.00 %
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. AERONEFS
2. ENTRETIEN/MAINTENANCE
3. EQUIPMENTS DE CONTROLE D'AEROPORT DE SURVOL
4. SERVICES/FORMATION
5. VEHICULES D'ENTRETIEN ET MAINTENANCE
6. INFORMATIQUE
7. ELECTRONIQUE

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
- Strong sectoral capability in Canada
- Competitive Canadian financing
- willingness of exporters to invest/joint venture in territory

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RPTCL

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
- LA CONNAISSANCE ET L'USAGE DU
- FRANCAIS SONT FORTEMENT RECOMMANDES

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

Activity: FOIRE
Expected Results: MAINTIEN DE PRESENCE CANADIENNE

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

Activity: SEMINAIRE UN JOUR: AERONEFS
Expected Results: ATTEINDRE TOUS LES CLIENTS POTENTIELS VENTES EVENTUELLES

Activity: VISITE FORCES AERIENNES: AERONEFS
Expected Results: ETABLISSEMENT D'UN CLIMAT DE CONFIANCE. VENTES EVENTUELLES

Activity: DEMONSTRATIONS DE PRODUITS
Expected Results: FAMILIARISATION - ETABLISSEMENT D'UN CLIMAT DE CONFIANCE - VENTES

Activity: VISITES D'ALGERIENS AU CANADA
Expected Results: FAMILIARISATION - ETABLISSEMENT D'UN CLIMAT DE CONFIANCE - COOPERATION

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ALGIERS

Market: ALGERIA

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

SELON LES A.O.I.

Approximate Value: 0 M\$

Financing Source :

Contact : J.H. DESJARDINS

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ALGIERS

Market: ALGERIA

Sector : MINE, METAL, MINERAL PROD & SRV

Sub-Sector: EQUIPMENT AND MACHINERY

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	50.00 \$M	35.00 \$M	20.00 \$M	30.00 \$M
Canadian Exports	1.50 \$M	3.00 \$M	2.30 \$M	5.00 \$M
Canadian Share of Market	3.00 %	9.00 %	12.00 %	17.00 %

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

Major Competing Countries

Market Share

EUROPEAN COMMON MARKET C	45.00 %
OTHER COUNTRIES	25.00 %
JAPAN	20.00 %
BRAZIL	8.00 %
INDIA	2.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. SERVICES - INGENIEURS ET FORMATION
2. CONSTRUCTEURS D'USINES
3. EQUIPEMENT DE MINES

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
- Competitive Canadian financing
- willingness of exporters to invest/joint venture in territory

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ALGIERS

Market: ALGERIA

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Market prospects have not been adequately explored
- Performance of local agent or representative
- L'ALGERIE N'A PAS DEVELOPPE LE
- SECTEUR MINIER.

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

Activity: LE CDA FAIT PLUSIEURS ETUDES AFIN DE PENETRER LE MARCHÉ
Expected Results: DEFINIR LE MARCHÉ ET LES PROJETS

Activity: SUIVI MISSION ALBERTA 1987 POUR LE SECTEUR.
Expected Results: CONTINUER A FAIRE CONNAITRE LES SOCIETES ET EXPERTS CONS
DANS LE DOMAINE

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

Activity: MISSION OFFICIELLE PAR LE GOV'T FEDERAL ET QUEBEC OU ALTA.
Expected Results: OBTENIR CONTRATS ENG. ET DE FORMATION, D'EXPLORATION DANS
DOMAINES PLOMB, ZINC OU UR

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

Activity: JOURNEE TECHNIQUE DANS LE DOMAINE DES SERVICES ENGINEERING
Expected Results: DEMONTRER COMPETENCE ET QUALITE DES SERVICES ET EQUIPEMENTS
CANADIENS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ALGIEKS

Market: ALGERIA

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

SELON LES A.D.I.

Approximate Value: 0 M\$

Financing Source :

Contact : D. J. KANE/A. ZEHANI

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ALGIERS

Market: ALGERIA

Sector : OIL & GAS EQUIPMENT, SERVICES

Sub-Sector: MACHINERY AND EQUIPMENT

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	250.00 \$M	200.00 \$M	150.00 \$M	150.00 \$M
Canadian Exports	5.00 \$M	10.00 \$M	7.00 \$M	10.00 \$M
Canadian Share of Market	2.00 %	5.00 %	4.70 %	7.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	40.00 %
JAPAN	30.00 %
FRANCE	15.00 %
ITALY	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. OIL-WELL SERVICING EQUIPMENT
2. OIL-WELL EQUIPMENT
3. DRILLING EQUIPMENT
4. PARTS: TRUCKS (KENWORTH, CLARK)
5. PIPELINE EQUIPMENT
6. PIPELINE SERVICING EQUIPMENT
7. TRUCKS AND CRANES
8. GENERATORS
9. SEPARATORS
10. VALVES

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RPTCL

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

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
- BIEN QUE NUN ESSENTIELS, LA
- CONN. ET L'USAGE DU FRANCAIS

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

Activity: CERI CONFERENCE

Expected Results: RAPPROCHEMENT CDA/ALGERIE SECTEUR GAZ

Activity: PARTICIPATION AU NPS

Expected Results: FAMILIARISATION AVEC CAPACITES CONNES CONTRATS EVENTUELS

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

Activity: FOIRE

Expected Results: RELATIONS GENERALES

Activity: PARTICIPATION AU NPS

Expected Results: FAMILIARISATION AVEC CAPACITES CONNES CONTRATS EVENTUELS

Activity: PARTICIPATION A INTERCAN

Expected Results: FAMILIARISATION AVEC CAPACITES CONNES CONTRATS EVENTUELS

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RPTCL

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: JOURNEES TECHNIQUES

Expected Results: PLAN D'ACTION POUR SOCIETES CONES Y COMPRIS TRANSFERT TECHNOLOGIQUE

Activity: OUVERTURE D'UN BUREAU DE LIAISON

Expected Results: MEILLEUR SUIVI DES DOSSIERS ET DES OPPORTUNITES. PRESENCE LOCALE

Activity: VISITE ALGNE DU CANADA A HAUT NIVEAU

Expected Results: FAMILIARISATION COOPERATION PLUS INTENSE

Activity: VISITE AU NIVEAU DES GOUVERNEMENTS PROVINCIAUX

expected Results: FAMILIARISATION AVEC POTENTIEL DU MARCHE.

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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 still in the planning stage which provide opportunities for Canadian suppliers:

SELON LES A.U.I.

Approximate Value: 0 M\$

Financing Source :

Contact : J. H. DESJARDINS/A. ZEHANI

KPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ALGIERS

Market: ALGERIA

Sector : EDUCATION, MEDICAL, HEALTH PROD

Sub-sector: PHARMACEUTICALS, BIOTECHNOLOGY

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	250.00 \$M	300.00 \$M	400.00 \$M	425.00 \$M
Canadian Exports	0.50 \$M	0.20 \$M	0.20 \$M	6.00 \$M
Canadian Share of Market	0.20 %	0.06 %	0.05 %	2.00 %

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

Major Competing Countries	Market Share
FRANCE	40.00 %
GERMANY WEST	20.00 %
UNITED STATES OF AMERICA	10.00 %
JAPAN	5.00 %
OTHER COUNTRIES	10.00 %

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

Products/services for which there are good market prospects:

1. MEDECINE NUCLEAIRE, BOMBES AU COBALT
2. MATERIEL DE TRAITEMENT
3. MATERIEL D'ECHOGRAPHIE
4. VALVES CARDIAQUES
5. PRODUITS PHARMACEUTIQUES ET DERIVES

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
- EQUIVALENCE DE PRODUITS
- PHARMACEUTIQUES TRES
- CHERE

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ALGIERS

Market: ALGERIA

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising

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

Activity: ACTIVITES DE VENTES D'EQUIPEMENT
Expected Results: VENTES D'EQUIPEMENT EN 1988/89

Activity: PRODUITS PHARMACEUTIQUES
Expected results: VENTES DE PRODUITS PHARACEUTIQUES

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

Activity: PRODUITS PHARMACEUTIQUES ET EQUIPEMENT. MISSION AU CANADA
Expected Results: FAIRE CONNAITRE L'INDUSTRIE CANNE AUX ALGERIENS.

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

Activity: JOURNEE TECHNIQUE EN ALGERIE SECTEUR EQUIPEMENT
Expected Results: AUGMENTER CONSIDERABLEMENT NOTRE CHIFFRE D'AFFAIRES

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ALGIERIS

Market: ALGERIA

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

SELON LES A.O.I.

Approximate Value: 0 MS

Financing Source :

Contact : D. KANE/A. ZEHANI

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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 (Estimated)	Next Year (Projected)
Market Size	0.00 \$M	0.00 \$M	200.00 \$M	200.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	10.00 \$M	20.00 \$M
Canadian Share of Market	0.00 %	0.00 %	5.00 %	10.00 %

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

Major Competing Countries

Market Share

FRANCE	60.00 %
BELGIUM	20.00 %
EUROPEAN COMMON MARKET C	15.00 %

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

Products/services for which there are good market prospects:

1. EQUIPEMENTS DE LABORATOIRE
2. EQUIPEMENTS D'APPRENTISSAGE
3. SERVICES/FORMATION

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Provincial export promotion
- Competitive pricing
- Canada is one of few sources of supply
- Competitive Canadian financing

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Market prospects have not been adequately explored
- LA CONNAISSANCE ET L'USAGE DU
- FRANCAIS SONT ESSENTIELS.

Post : ALGIERS

Start Date	Event Name, Location & Type	Sector/Post/Contact
89/05/15	3E SALON DES PETITS ELEVAGES BOUMERDES ALGERIE INFO BOOTH, ONLY	AGRI & FOOD PRODUCTS & SERVICE
89/05/00	MISSION FROM AFRICA TO INTERCAN 89 MISSION IN, TO FAIR	OIL & GAS EQUIPMENT, SERVICES
89/05/06	ALGIERS INTL TRADE FAIR, ALGIERS, ALGERIA FAIR, NATIONAL STAND	GENERAL OR UNASSIGNED ISB T.GERVAIS
00/00/00	RAILWAY SYSTEM MISSION FROM ALGERIA MISSION IN, TO INDUSTRY	TRANSPORT SYS, EQUIP, COMP, SERV.

RPT81

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: HARARE

Country: ZIMBABWE

ANGOLA: THE ANGOLAN ECONOMIC INFRASTRUCTURE, WITH THE EXCEPTION OF THE PETROLEUM INDUSTRY, HAS BEEN VIRTUALLY DESTROYED BY MORE THAN FIFTEEN YEARS OF WAR. EDC SIGNED A LINE OF CREDIT FOR \$31 MILLION WITH CHEVRON AND THE ANGOLAN STATE OIL COMPANY FOR THE SUPPLY OF OILFIELD AND RELATED EQUIPMENT IN 1987. DUE TO PROBLEMS OF DISTANCE AND COMMUNICATION, POST EFFORTS IN ANGOLA WILL BE LIMITED TO SUPPORTING EXPORTERS SELLING TO THE PETROLEUM INDUSTRY. CANADIAN EXPORTS IN 1987: \$4.7M (TALLOW, ASBESTOS).

BOTSWANA: THIS LARGE, SPARSELY POPULATED (ONE 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 EXPORTERS ARE LIMITED NOT ONLY BY THE MINISCULE SIZE OF THE MARKET BUT ALSO BECAUSE CHANNELS OF DISTRIBUTION ARE ALMOST EXCLUSIVELY THROUGH RSA. THERE ARE A NUMBER OF CIDA AND MULTILATERAL PROJECTS WHICH THE POST PURSUES. THERE ARE ALSO CURRENT OPPORTUNITIES FOR LOCOMOTIVES AND TELECOMMUNICATIONS EQUIPMENT.

MALAWI: CANADIAN EXPORTS TO MALAWI WERE \$3.7 MILLION IN 1987, PRIMARILY FERTILIZER AND PHARMACEUTICALS. AN INFUX OF REFUGEES HAS DESTABILIZED THIS FRAGILE, LARGELY AGRARIAN ECONOMY. THE POST PURSUES OPPORTUNITIES IN A NUMBER OF MULTILATERAL PROJECTS IN HEALTH, EDUCATION AND ROADS.

MOZAMBIQUE: ANOTHER VICTIM OF INTERNAL CONFLICT AND REGIONAL DESTABILIZATION, MOZAMBIQUE'S ECONOMY IS IN RUINS. CANADIAN EXPORTS IN 1987 TOTALLED \$18.4 MILLION, MOSTLY CIDA FUNDED RAILWAY EQUIPMENT. AS THE CIDA PROGRAM EXPANDS, SO WILL OPPORTUNITIES FOR CANADIAN EXPORTS.

ZAMBIA: NOT EVEN IMPROVED COPPER PRICES HAVE HELPED THIS FOUNDERING ECONOMY. ZAMBIA HAS NOT YET RE-ESTABLISHED RELATIONS WITH THE IMF (BROKEN OFF IN 1987) AND AID FLOWS, INCLUDING THE CIDA PROGRAM, HAVE DECLINED SIGNIFICANTLY. CANADIAN EXPORTS WERE \$18.9 MILLION IN 1987, MOSTLY AID RELATED, (TELECOMMUNICATIONS, WHEAT). WHEN THE CIDA PROGRAM (INCLUDING A PRIVATE SECTOR LINE OF CREDIT) IS REINSTATED, OPPORTUNITIES FOR CANADIAN PRODUCTS WILL IMPROVE.

ZIMBABWE: THE PREDOMINANT ECONOMY IN OUR TERRITORY, ZIMBABWE IS ENJOYING A YEAR OF RECOVERY BASED ON IMPROVEMENT IN AGRICULTURAL OUTPUT AND STRONG PRICES FOR ITS MINERAL EXPORTS. FOREIGN EXCHANGE REMAINS TIGHTLY CONTROLLED HOWEVER AND OPPORTUNITIES FOR NEW SUPPLIERS ARE LIMITED. POST EFFORTS WILL CONTINUE TO FOCUS ON THE CIDA AND MULTILATERAL PROJECTS: PULP AND PAPER, URBAN TRANSIT, POWER DEVELOPMENTS AND TRANSPORTATION INDUSTRIES. CONSIDERABLE EFFORT WILL CONTINUE TO BE DEVOTED TO THE EFFICIENT USE OF THE CIDA GENERAL LINE OF CREDIT (GLOC). THE GLOC PROVIDES THE BEST OPPORTUNITY TO INTRODUCE CANADIAN PRODUCTS TO THIS MARKET. CANADIAN EXPORTS IN 1987 WERE \$ 8.8 MILLION (WHEAT, RESINS, AIRCRAFT ENGINES).

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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 reasons:

1. TRANSPORT SYS,EQUIP,COMP,SERV.
ZIMBABWE RAILWAYS HAVE IDENTIFIED IMMEDIATE REQUIREMENT FOR 10 LOCOMOTIVES PLUS OTHER OVER A FIVE YEAR PERIOD. THERE ARE REQUIREMENTS FOR LOCOMOTIVES BY BOTSWANA RAILWAYS CIDA HAS ALSO PLEDGED FUNDS FOR REHABILITATION OF LIMPOPO RAIL SYSTEM IN MOZAMBIQUE. NEGOTIATIONS STILL CONT. RE SALE DASH 8 TO AIR ZIMBABWE AND CHITUNGWIZA URBAN TRANSPORT.
2. ADVANCED TECH. PROD. & SERV
THERE ARE A NUMBER OF PROPOSED PROJECTS IN BOTSWANA, MALAWI AND ZIMBABWE FOR EXTENSION RURAL COMMUNICATIONS. ANGOLA ALSO PLANNING EXTENSION OF AND REHABILITATION OF TELECOMMUNICATIONS SYSTEMS. EDC AND CIDA FUNDING SOUGHT.
3. POWER & ENERGY EQUIP. & SERV.
MALAWI AND ZIMBABWE EXAMINING MEANS OF INCREASING ELECTRICITY GENERATING CAPACITY. MALAWI LOOKING AT MINI HYDRO WHILE ZIMBABWE STILL TO IDENTIFY SOURCE OF INCREASED POWER REQUIREMENT, HYDRO OR THERMAL. FINANCING WILL BE MAJOR REQUIREMENT.
4. OIL & GAS EQUIPMENT,SERVICES
ANGOLA HAS MADE USE OF CANADIAN COMPANIES UTILISING EDC CREDIT LINE FOR EQUIPMENT REQUIREMENTS. ZIMBABWE LOOKING FOR CONSTRUCTION NEW OIL STORAGE FACILITIES AND 175KM FUEL PIPELINE. ANTICIPATE CANADA WILL ACHIEVE SHARE OF PROJECTS IF FINANCING AVAILABLE.
5. EDUCATION,MEDICAL,HEALTH PROD
ANGOLA, MALAWI, MOZAMBIQUE AND ZAMBIA ARE BIG IMPORTERS OF PHARMACEUTICAL PRODUCTS, SERUMS AND VACCINES CIDA FINANCING HAS PROVIDED ACCESS TO MALAWI AND ZAMBIA MARKETS WHILE AGGRESSIVE MARKETING HAS ACHIEVED LARGER SHARE ZIMBABWE, BOTSWANA AND ANGOLA MARKETS.

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

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: HAPARE

Market: ANGOLA

Sector : OIL & GAS EQUIPMENT, SERVICES

Sub-Sector: MACHINERY AND EQUIPMENT

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	9.00 \$M	10.00 \$M	12.00 \$M	14.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	1.20 \$M	2.00 \$M
Canadian Share of Market	0.00 %	0.00 %	10.00 %	14.20 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	55.00 %
FRANCE	32.00 %
JAPAN	8.00 %
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:

- EQUIPMENT OFFSHORE OIL RIGS

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- Fairs and Missions support
- 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
- Non-competitive financing
- Market prospects have not been adequately explored
- LACK OF FOREIGN
- EXCHANGE.

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: HARARE

Market: ANGOLA

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

Activity: EDC LINE OF CREDIT TO ANGOLAN OIL INDUSTRY TO BE UTILISED
Expected Results: INCREASED SHARE OF MARKET.

Activity: ZIMBABWE NEW OIL STORAGE FAC & MAJOR PIPE LINE BEING PURSUED
Expected Results: INCREASED SHARE OF MARKET.

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: HARARE

Market: ZIMBABWE

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: TELECOMMUNICATIONS (INC SPACE)

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	59.00 \$M	40.00 \$M	58.00 \$M	63.00 \$M
Canadian Exports	0.10 \$M	0.50 \$M	1.80 \$M	2.20 \$M
Canadian Share of Market	0.17 %	1.25 %	3.10 %	3.40 %

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

Major Competing Countries	Market Share
UNITED KINGDOM	31.00 %
SOUTH AFRICA	22.00 %
GERMANY WEST	19.00 %
JAPAN	16.00 %
FRANCE	14.00 %

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

Factors contributing to current successful Canadian exports:

- Strong sectoral capability in Canada.
- Bilateral economic trade agreement
- Competitive Canadian financing

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector

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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: EXPANDED RURAL COMM SERVICES WITH CIDA FINANCING
Expected Results: INCREASED SHARE OF MARKET.\

Activity: MISSION TO KEEP CANADIAN EXPORTERS ADVISED ON OPPORTUNITIES
Expected Results: INCREASED SHARE OF MARKET.

Activity: CONT CONTACT W/TELECOMM UTILITIES RE OPPORT FOR CON PRODUCTS
Expected Results: INCREASED SHARE OF MARKET.

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

Activity: EXHIBITING AT ZIMBABWE INTNL TRADE FAIR BULAWAYO MAY 1989
Expected Results: INCREASED EXPOSURE TO MARKET.

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: HARARE

Market: ZIMBABWE

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

ZIMBABWE POSTS & TELECOMM DEPT
REQUIREMENTS 5 YEAR PLAN

Approximate Value:	5 M\$
Financing Source :	
Contact	: COUNSELLER (COMM) CHC HARARE TELEX: 4465 TEL: 733881

MALAWI POST & TELECOMM RURAL
TELECOMM & NEW EXCHANGES

Approximate Value:	3 M\$
Financing Source :	
Contact	: COUNSELLER (COMM) CHC HARARE TELEX: 4465 TEL: 733881

ANGOLAN TELECOMM DEPT.
CONNECTION OF ALL COASTAL TOWN

Approximate Value:	8 M\$
Financing Source :	
Contact	: COUNSELLER (COMM) CHC HARARE TELEX: 4465 TEL: 733881

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: HARARE

Market: ZIMBABWE

Sector : POWER & ENERGY EQUIP. & SERV.

Sub-Sector: HYDRO

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	50.00 \$M	50.00 \$M	60.00 \$M	60.00 \$M
Canadian Exports	0.20 \$M	0.05 \$M	0.80 \$M	1.60 \$M
Canadian Share of Market	0.40 %	1.00 %	1.30 %	2.60 %

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

Major Competing Countries	Market Share
SOUTH AFRICA	32.00 %
UNITED KINGDOM	28.00 %
GERMANY WEST	25.00 %
UNITED STATES OF AMERICA	25.00 %

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

Products/services for which there are good market prospects:

1. CONSULTANCY SERVICES TO UTILITIES
2. HYDRO OR THERMAL EQUIPMENT
3. POWERLINE REHABILITATION

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:

- Non-competitive financing

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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: STILL AWAITING ZIM GOZ DECISION RE SOURCE OF INCREASED POWER
Expected Results: INCREASED CANADIAN PARTICIPATION.

Activity: WORLD BANK II POWER REHAB PROGRAMME. AWAITING PUBLISHING
Expected Results: INCREASED CANADIAN PARTICIPATION.

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

Activity: CEA ENERGY MISSION TO ZIMBABWE, MALAWI AND BOTSWANA
Expected Results: IMPROVED KNOWLEDGE OPPORTUNITIES IN REGION.

Activity: ZIMBABWE INTERNATIONAL TRADE FAIR MAY 1989
Expected Results: CANADIAN PRODUCTS RECEIVING INCREASED EXPOSURE TO MARKET AREA.

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: HARARE

Market: ZIMBABWE

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

HYDRO OR THERMAL EXP ZIMBABWE Approximate Value: 170 M\$
STILL TO BE ANNOUNCED. Financing Source :
Contact : COUNSELLOR (COMM) CDN HIGH COM
HARARE TEL 733881 TLX 4465ZW

POWERLINE REHABILITATION Approximate Value: 50 M\$
PROJECTS Financing Source :
Contact : COUNSELLOR (COMM) CDN HIGH COM
HARARE TEL 733881 TLX 4465ZW

SUPPLY OF THERMAL OR HYDRO EQP Approximate Value: 10 M\$
TENDERS TO BE PUBLISHED Financing Source :
Contact : COUNSELLOR (COMM) CDN HIGH COM
HARARE TEL 733881 TLX 4465ZW

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: HARARE

Market: ZIMBABWE

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: RAIL

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	34.00 \$M	51.00 \$M	60.00 \$M	64.00 \$M
Canadian Exports	0.30 \$M	0.60 \$M	0.90 \$M	1.10 \$M
Canadian Share of Market	0.91 %	1.20 %	2.20 %	2.80 %

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

Major Competing Countries	Market Share
SOUTH AFRICA	44.00 %
UNITED KINGDOM	20.00 %
GERMANY WEST	18.00 %
FRANCE	18.00 %

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

Products/services for which there are good market prospects:

1. RAILWAYS VEHICLE SPARES

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- CIDA programs
- Competitive pricing
- Bilateral economic trade agreement
- Competitive Canadian financing

Factors for Canadian exports not reaching market potential:

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

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RPTCL

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: CONTINUED CONTACT WITH RAILWAYS
Expected Results: SALE OF GM LOCOS AND DASH 8.

Activity: CONTINUED CIDA PRIVATE SECTOR LINE OF CREDIT 89/90
Expected Results: INCREASE SALES AIRCRAFT SPARES.

Activity: CONTINUED CONTACT WITH MINISTRIES RE CHITUNGWIZA
Expected Results: CONTRACT TO BE AWARDED TO CANADIAN COMPANY.

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

NATIONAL RAILWAYS OF ZIMBABWE	Aproximate Value:	20 M\$
NEW LOCOS - RE ENGINEERING	Financing Source :	OTHER
	Contact :	COUNSELLOR (COMM) CHC
		TELEX: 4465 ZW TEL: 733881

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: HARARE

Market: ZIMBABWE

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: AEROSPACE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	20.00 \$M	40.00 \$M	40.00 \$M	50.00 \$M
Canadian Exports	0.10 \$M	0.30 \$M	0.30 \$M	8.00 \$M
Canadian Share of Market	0.50 %	0.70 %	0.70 %	4.00 %

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

Major Competing Countries	Market Share
UNITED KINGDOM	40.00 %
UNITED STATES OF AMERICA	40.00 %
FRANCE	20.00 %

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

Products/services for which there are good market prospects:

1. AIRCRAFT
2. SPARES

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- CIDA programs
- Competitive pricing

Factors for Canadian exports not reaching market potential:

- Non-competitive financing

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: HARARE

Market: ZIMBABWE

Sector : OIL & GAS EQUIPMENT, SERVICES

Sub-Sector: MACHINERY AND EQUIPMENT

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	0.50 \$M	0.50 \$M	0.50 \$M	2.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.00 \$M	5.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	25.00 %

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

Major Competing Countries Market Share

UNITED STATES OF AMERICA	60.00 %
SOUTH AFRICA	20.00 %
PORTUGAL	20.00 %

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

Products/services for which there are good market prospects:

1. EQUIPMENT AND PLANT

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- CIDA programs
- Competitive pricing

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: HARARE

Market: ZIMBABWE

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

Activity: LOOKING AT INVOLVEMENT PROPOSED 175KM PIPE LINE MUTARE-HARARE
Expected Results: CANADIAN INVOLVEMENT.

Activity: MAINTAINING CONTACT W/MIN OFF RE PROPOSED NEW WHITE FUELS
Expected Results: CANADIAN INVOLVEMENT.

Activity: KEEPING ABREAST WITH DEV RELATING TO PROPOSED OIL REFINERY
Expected Results: CANADIAN INVOLVEMENT.

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

FUEL PIPELINE MUTARE TO
HARARE

Approximate Value: 5 M\$
Financing Source :
Contact : COUNSELLOR (COMM) CDN HIGH COM
 HARARE TELEX: 4465 ZW

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: HARARE

Market: ZIMBABWE

Sector : EDUCATION, MEDICAL, HEALTH PROD

Sub-Sector: PHARMACEUTICALS, BIOTECHNOLOGY

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	30.00 \$M	32.00 \$M	35.00 \$M	37.00 \$M
Canadian Exports	1.00 \$M	2.00 \$M	2.00 \$M	3.20 \$M
Canadian Share of Market	3.30 %	6.50 %	8.20 %	8.60 %

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

Major Competing Countries Market Share

FRANCE	28.00 %
UNITED KINGDOM	23.00 %
SOUTH AFRICA	21.00 %
UNITED STATES OF AMERICA	16.00 %
GERMANY WEST	12.00 %

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

Products/services for which there are good market prospects:

1. PHARMACEUTICALS
2. SERUMS AND VACCINES

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- PEMD support
- CIDA programs
- Competitive pricing
- 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
- Market prospects have not been adequately explored
- LACK OF FOREIGN
- EXCHANGE.

29/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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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: CONTACT ESTABLISHED W/MAJOR IMPORTERS IN TERR. CDN EXP ADVIS
Expected Results: INCREASED SHARE MARKET.

Activity: TENDER DOCUMENTS FOR GOVT REQ CONTINUE TO BE OBTAINED & FORW
Expected Results: INCREASED SHARE MARKET.

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

GOVT TENDER REQ. ANGOLA, MOZAMB Approximate Value: 10 M\$
IQUE, MALAWI, BOTSWANA, ZIMBABWE Financing Source: OTHER
Contact : COUNSELLOR (COMM) CDN HIGH COMM
HARARE BOX 1430, TEL 733881.

Post : HARARE

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Post/Contact</u>
89/04/01	MINING MISSION TO SADCC ZIMBABWE, BOTSWANA, ZAMBIA, ANGOLA MISSION OUT, INDUSTRY	MINE, METAL, MINERAL PROD & SRV
89/04/30	ZIMBABWE INTL TRADE FAIR (ZITF) BULAWAYO INFO BOOTH, ONLY	INDUSTRIAL MACHIN, PLANTS, SERV A. AUBIN
89/06/00	CUA-ZIMBABWE JOINT ECONOMIC COMMISSION MEETING	GENERAL OR UNASSIGNED ISB
89/06/03	MINISTERIAL MISSION FROM ANGOLA MISSION IN, TO INDUSTRY	GENERAL OR UNASSIGNED ISB A. AUBIN
90/02/00	SADCC BUSINESS FORUM SEMINAR, ABOARD	GENERAL OR UNASSIGNED ISB

RPTBI

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: KINSHASA

Country: ZAIRE

PEUPLE DE 35 MILLIONS D'HABITANTS, LE ZAIRE DISPOSE D'UN ENSEMBLE DE RES-
SOURCES NATURELLES ET DE BESOINS QUI PRESENTENT DES SIMILARITES FRAPPANTES
AVEC CE QUE L'ON TROUVE AU CANADA. C'EST LE PAYS LE PLUS INDUSTRIALISE
D'AFRIQUE NOIRE. CES RESSEMBLANCES SONT A L'AVANTAGE DES SOCIETES CANA-
DIENNES QUI ONT DEJA L'EXPERTISE ET LES EQUIPEMENTS NECESSAIRES AU DEVE-
LOPPEMENT DE SECTEURS INDUSTRIELS TELS QUE: LES MINES, LE TRANSPORT D'ENER-
GIE ELECTRIQUE, L'INDUSTRIE FORESTIERE, LA PRODUCTION INDUSTRIELLE DE PRO-
DUITS DE BASE, L'AGRO-PASTORAL ET L'AGRO-ALIMENTAIRE. EN DEBIT D'UNE SITUA-
TION ECONOMIQUE DES PLUS DIFFICILES ET D'UN NIVEAU D'INFLATION SANS PRECE-
DENT, LES AUTORITES ZAIRUISES ONT CHOSI LA VOIE DE L'AUTOSUFISANCE. LES
ZAIROIS SOUHAITENT DIVERSIFIER LEURS ECHANGES INTERNATIONAUX. IL EST DONC
IMPURTANT QUE LES SOCIETES CANADIENNES SOIENT ATTENTIVES ET PERSEVERENT
DANS LEURS EFFORTS DE PENETRER CE MARCHE. PLUSIEURS GRANDS PROJETS FINAN-
CES PAR LA BANQUE MONDIALE, LE PNUD ET LA BANQUE AFRICAINE DE DEVELOPPEMENT
SONT A L'ETUDE OU DEJA EN MARCHE. POUR LA REHABILITATION DE LA GECAMINE, ON
ANTICIPE DES INVESTISSEMENTS DE US \$ 1,5 MILLIARD. D'AUTRES SOCIETES MI-
NIERES PREVOIENT EGLEMENT DES INVESTISSEMENTS SIGNIFICATIFS. PAR LE BIAIS
DES PROGRAMMES D'AIDE ALIMENTAIRE ET DE LIGNE DE CREDIT MULTISECTORIELLE
DE L'ACDI, DES POSSIBILITES EXISTENT POUR DES PRODUITS OU LA DEMANDE EST
PARTICULIEREMENT FORTE: PRODUITS DE POLYMERISATION, PAPIER ET CARTON, IN-
TRANTS INDUSTRIELS. PARMIS LES 25 SOCIETES MIXTES ZAIROISES, CERTAINES (OONT
L'ONATRA, L'OFFICE DES ROUTES, LA SNCZ, L'ONPTZ, ET L'OKIMO; PROJET D'EX-
TRACTION D'OR DE KILOMOTO) ONT DES PROJETS INTERESSANTS POUR LES SOCIETES
CANADIENNES. LA SNEL A EN AUTRE, DE NOMBREUX PROJETS D'ELECTRIFICATION. LE
POTENTIEL HYDROELECTRIQUE EST D'UN MILLION DE MW. NOTONS QUE LE TOTAL DES
IMPORTATIONS DU ZAIRE S'ELEVE A US \$ 1 MILLIARD ANNUELLEMENT. IL SERAIT
SOUHAITABLE QUE LE SEE OUVRE UNE LIGNE DE CREDIT A LA GECAMINE.

CONGO, RWANDA, BURUNDI: CES TROIS PETITS PAYS, CHACUN AVEC UNE POPULATION
NE DEPASSANT PAS 5 MILLIONS D'HABITANTS OFFRENT DES POSSIBILITES LIMITEES
QUI TOUCHENT PRINCIPALEMENT L'ENERGIE, LE TRANSPORT, LES COMMUNICATIONS ET
LA FORET. SUITE A UN ENVIRONNEMENT ECONOMIQUE DIFFICILE CARACTERISE PAR
UNE INFLATION SOUTENUE, CES TROIS PAYS ONT COMME OBJECTIF PREMIER DE RE-
DUIRE PROGRESSIVEMENT LE DEFICIT ALIMENTAIRE AFIN DE PARVENIR A L'AUTOSU-
FISANCE. NOUS PENSONS QUE NOTRE ACTION DEMEURERA LIMITEE AUX INTERVENTIONS
RENDUES POSSIBLES PAR LES PROJETS BM, BAD ETC...

AU CONGO, IL Y A UN PROJET BM DE DEVELOPPEMENT FORESTIER DE 100 M. US \$
REPARTIS SUR PLUSIEURS ANNEES EN DISCUSSION. L'ETAT VEUT EGLEMENT INVE-
TIR DANS LE SECTEUR MINIER. MAIS, VU LA CONJONCTURE ECONOMIQUE ACTUELLE
PEU FAVORABLE, LES PERSPECTIVES IMMEDIATES DEMEURENT LIMITEES. UN PROJET
DE TELEPHONIE CELLULAIRE EST EN DISCUSSION. NOUS ACCENTUERONS NOS EFFORTS
SURTOUT VERS LE SECTEUR PRIVE.

RPTBL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: KINSHASA

Country: BUKUNDI

PEUPLE DE 35 MILLIONS D'HABITANTS, LE ZAIRE DISPOSE D'UN ENSEMBLE DE RESOURCES NATURELLES ET DE BESOINS QUI PRESENTENT DES SIMILARITES FRAPPANTES AVEC CE QUE L'ON TROUVE AU CANADA. C'EST LE PAYS LE PLUS INDUSTRIALISE D'AFRIQUE NOIRE. CES RESSEMBLANCES SONT A L'AVANTAGE DES SOCIETES CANADIENNES QUI ONT DEJA L'EXPERTISE ET LES EQUIPEMENTS NECESSAIRES AU DEVELOPPEMENT DE SECTEURS INDUSTRIELS TELS QUE: LES MINES, LE TRANSPORT D'ENERGIE ELECTRIQUE, L'INDUSTRIE FORESTIERE, LA PRODUCTION INDUSTRIELLE DE PRODUITS DE BASE, L'AGRO-PASTORAL ET L'AGRO-ALIMENTAIRE. EN DEBIT D'UNE SITUATION ECONOMIQUE DES PLUS DIFFICILES ET D'UN NIVEAU D'INFLATION SANS PRECEDENT, LES AUTORITES ZAIRDISES ONT CHOISI LA VOIE DE L'AUTOSUFISANCE. LES ZAIRDIS SOUHAITENT DIVERSIFIER LEURS ECHANGES INTERNATIONAUX. IL EST DONC IMPORTANT QUE LES SOCIETES CANADIENNES SOIENT ATTENTIVES ET PERSEVERENT DANS LEURS EFFORTS DE PENETRER CE MARCHE. PLUSIEURS GRANDS PROJETS FINANCES PAR LA BANQUE MONDIALE, LE PNUD ET LA BANQUE AFRICAINE DE DEVELOPPEMENT SONT A L'ETUDE OU DEJA EN MARCHE. POUR LA REHABILITATION DE LA GECAMINE, ON ANTICIPE DES INVESTISSEMENTS DE US \$ 1,5 MILLIARD. D'AUTRES SOCIETES MINIERES PREVOIENT EGALEMENT DES INVESTISSEMENTS SIGNIFICATIFS. PAR LE BIAIS DES PROGRAMMES D'AIDE ALIMENTAIRE ET DE LIGNE DE CREDIT MULTISECTORIELLE DE L'ACDI, DES POSSIBILITES EXISTENT POUR DES PRODUITS OU LA DEMANDE EST PARTICULIEREMENT FORTE: PRODUITS DE POLYMERISATION, PAPIER ET CARTON, INTRANTS INDUSTRIELS. PARMI LES 25 SOCIETES MIXTES ZAIRDISES, CERTAINES (DONT L'ONATRA, L'OFFICE DES ROUTES, LA SNCZ, L'ONPTZ, ET L'OKIMO, PROJET D'EXTRACTION D'OR DE KILUMOTO) ONT DES PROJETS INTERESSANTS POUR LES SOCIETES CANADIENNES. LA SNEL A EN AUTRE, DE NOMBREUX PROJETS D'ELECTRIFICATION. LE POTENTIEL HYDROELECTRIQUE EST D'UN MILLION DE MW. NOTONS QUE LE TOTAL DES IMPORTATIONS DU ZAIRE S'ELEVE A US \$ 1 MILLIARD ANNUELLEMENT. IL SERAIT SOUHAITABLE QUE LE SEE OUVRE UNE LIGNE DE CREDIT A LA GECAMINE.

CONGO, RWANDA, BUKUNDI: CES TROIS PETITS PAYS, CHACUN AVEC UNE POPULATION NE DEPASSANT PAS 5 MILLIONS D'HABITANTS OFFRENT DES POSSIBILITES LIMITEES QUI TOUCHENT PRINCIPALEMENT L'ENERGIE, LE TRANSPORT, LES COMMUNICATIONS ET LA FORFT. SUITE A UN ENVIRONNEMENT ECONOMIQUE DIFFICILE CARACTERISE PAR UNE INFLATION SOUFENUE, CES TROIS PAYS ONT COMME OBJECTIF PREMIER DE REDUIRE PROGRESSIVEMENT LE DEFICIT ALIMENTAIRE AFIN DE PARVENIR A L'AUTOSUFISANCE. NOUS PENSONS QUE NOTRE ACTION DEMEURERA LIMITEE AUX INTERVENTIONS RENDUES POSSIBLES PAR LES PROJETS BM, BAD ETC...

AU CONGO, IL Y A UN PROJET BM DE DEVELOPPEMENT FORESTIER DE 100 M. US \$ REPARTIS SUR PLUSIEURS ANNEES EN DISCUSSION. L'ETAT VEUT EGALEMENT INVESTIR DANS LE SECTEUR MINIER. MAIS, VU LA CONJONCTURE ECONOMIQUE ACTUELLE PEU FAVORABLE, LES PERSPECTIVES DEMEURENT LIMITEES. UN PROJET DE TELEPHONE CELLULAIRE EST EN DISCUSSION. NOUS ACCENTUERONS NOS EFFORTS SURTOUT VERS LE SECTEUR PRIVE.

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: KINSHASA

Country: RWANDA

PEUPLE DE 35 MILLIONS D'HABITANTS, LE ZAIRE DISPOSE D'UN ENSEMBLE DE RES-
SOURCES NATURELLES ET DE BESOINS QUI PRESENTENT DES SIMILARITES FRAPPANTES
AVEC CE QUE L'ON TROUVE AU CANADA. C'EST LE PAYS LE PLUS INDUSTRIALISE
D'AFRIQUE NOIRE. CES RESSEMBLANCES SONT A L'AVANTAGE DES SOCIETES CANA-
DIENNES QUI ONT DEJA L'EXPERTISE ET LES EQUIPEMENTS NECESSAIRES AU DEVE-
LOPPMENT DE SECTEURS INDUSTRIELS TELS QUE: LES MINES, LE TRANSPORT D'ENER-
GIE ELECTRIQUE, L'INDUSTRIE FORESTIERE, LA PRODUCTION INDUSTRIELLE DE PRO-
DUITS DE BASE, L'AGRO-PASTORAL ET L'AGRO-ALIMENTAIRE. EN DEBIT D'UNE SI-
TUATION ECONOMIQUE DES PLUS DIFFICILES ET D'UN NIVEAU D'INFLATION SANS
PRECEDENT, LES AUTORITES ZAIROISES ONT CHOISI LA VOIE DE L'AUTOSUFISANCE.
LES ZAIROIS SOUHAITENT DIVERSIFIER LEURS ECHANGES INTERNATIONAUX. IL EST
DONC IMPORTANT QUE LES SOCIETES CANADIENNES SOIENT ATTENTIVES ET PERSEVE-
RENT DANS LEURS EFFORTS DE PENETRER CE MARCHE. PLUSIEURS GRANDS PROJETS
FINANCES PAR LA BANQUE MONDIALE, LE PNUD ET LA BANQUE AFRICAINE DE DEVE-
LOPPMENT SONT A L'ETUDE OU DEJA EN MARCHÉ. POUR LA REHABILITATION DE LA
GECAMINE, ON ANTICIPE DES INVESTISSEMENTS DE US \$ 1,5 MILLIARD. D'AUTRES
SOCIETES MINIERES PREVIOIENT EGALLEMENT DES INVESTISSEMENTS SIGNIFICATIFS.
PAR LE BIAIS DES PROGRAMMES D'AIDE ALIMENTAIRE ET DE LIGNE DE CREDIT MUL-
TISECTORIELLE DE L'ACDI, DES POSSIBILITES EXISTENT POUR DES PRODUITS OU LA
DEMANDE EST PARTICULIEREMENT FORTE: PRODUITS DE POLYMERISATION, PAPIER ET
CARTON, INTRANTS INDUSTRIELS. PARMI LES 25 SOCIETES MIXTES ZAIROISES, CER-
TAINES (DONT L'ONATRA, L'OFFICE DES ROUTES, LA SNCZ, L'ONPTZ, ET L'OKIMO
PROJET D'EXTRACTION D'OR DE KILUMOTU) ONT DES PROJETS INTERESSANTS POUR
LES SOCIETES CANADIENNES. LA SNEL A EN AUTRE, DE NOMBREUX PROJETS D'ELEC-
TRIFICATION. LE POTENTIEL HYDROELECTRIQUE EST D'UN MILLION DE MW. NOTONS
QUE LE TOTAL DES IMPORTATIONS DU ZAIRE S'ELEVE A US \$ 1 MILLIARD ANNUELLE-
MENT. IL SERAIT SOUHAITABLE QUE LE SEE DOUVRE UNE LIGNE DE CREDIT A LA
GECAMINE.

CONGO, RWANDA, BURUNDI: CES TROIS PETITS PAYS, CHACUN AVEC UNE POPULATION
NE DEPASSANT PAS 5 MILLIONS D'HABITANTS OFFRENT DES POSSIBILITES LIMITEES
QUI TOUCHENT PRINCIPALEMENT L'ENERGIE, LE TRANSPORT, LES COMMUNICATIONS ET
LA FORET. SUITE A UN ENVIRONNEMENT ECONOMIQUE DIFFICILE CARACTERISE PAR
UNE INFLATION SOUTENUE, CES TROIS PAYS ONT COMME OBJECTIF PREMIER DE RE-
DUIRE PROGRESSIVEMENT LE DEFICIT ALIMENTAIRE AFIN DE PARVENIR A L'AUTOSU-
FISANCE. NOUS PENSONS QUE NUTRE ACTION DEMEURERA LIMITEE AUX INTERVENTIONS
RENDUES POSSIBLES PAR LES PROJETS BM, BAD ETC...

AU CONGO, IL Y A UN PROJET BM DE DEVELOPPEMENT FORESTIER DE 100 M. US \$
REPARTIS SUR PLUSIEURS ANNEES EN DISCUSSION. L'ETAT VEUT EGALLEMENT INVE-
STIT DANS LE SECTEUR MINIER. MAIS, VU LA CONJONCTURE ECONOMIQUE ACTUELLE
PEU FAVORABLE, LES PERSPECTIVES IMMEDIATES DEMEURENT LIMITEES. UN PROJET
DE TELEPHONIE CELLULAIRE EST EN DISCUSSION. NOUS ACCENTUERONS NOS EFFORTS
SURTOUT VERS LE SECTEUR PRIVE.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: KINSHASA

Market: ZAIRE

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: TELECOM, DATACOM, SAT, SPACECOM

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	10.00 \$M	10.00 \$M	12.00 \$M	15.00 \$M
Canadian Exports	0.00 \$M	1.00 \$M	2.00 \$M	3.00 \$M
Canadian Share of Market	0.00 %	10.00 %	17.00 %	20.00 %

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

Major Competing Countries	Market Share
GERMANY WEST	30.00 %
FRANCE	30.00 %
ITALY	20.00 %
UNITED STATES OF AMERICA	10.00 %
JAPAN	10.00 %

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

Products/services for which there are good market prospects:

1. CENTRALES TELEPHONIQUES
2. FAISCEAUX HERTZIENS
3. LIAISON MICRO-ONDE
4. STANDARD TELEX
5. EQUIPEMENT RADIO H.F.
6. MULTIPLEX
7. RADIO TRANSMISSION POUR AERODROME
8. TELEPHONIE CELLULAIRE STATION TERRESTRE & PERIPHER
9. SYSTEMES ILS POUR AERODROME

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Import duties are low
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Competitive pricing
- Strong sectoral capability in Canada

29/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: KINSHASA

Market: ZAIRE

Factors for Canadian exports not reaching market potential:

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

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

Activity: VISITE DE LIAISON

Expected Results: EVALUATION PROJET DE LA GECAMINE

Activity: MISSION AU CDA P.D.G. DE L'ONPTZ

Expected Results: FAIRE CONNAITRE ET VENDRE TECHNOLOGIE CDNE

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: KINSHASA

Market: ZAIRE

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

REHABILITATION TELECOM KINSHA- SA	Approximate Value: 70 M\$ Financing Source : OTHER Contact : AFF EXT,AFRIQUE FRANCOPH. AMB DU CANADA A KINSHASA
LIAISON TELECOM SNCZ-GCM- ZAMBIE	Approximate Value: 5 M\$ Financing Source : OTHER Contact : AFF,EXT,AFRIQUE FRANCOPH. AMB. DU CANADA A KINSHASA
RADIO CELLULAIRE CONGO/ZAIRE	Approximate Value: 30 M\$ Financing Source : OTHER Contact : AFF EXT,AFRIQUE FRANCOPH. AMB. DU CANADA A KINSHASA
INFRASTRUCTURE AEROPORTUAIRE LOUBOMU(CONGO)N'DJILI (ZAIRE)	Approximate Value: 10 M\$ Financing Source : OTHER Contact : AFF EXT,AFRIQUE FRANCOPH. AMB. DU CANADA A KINSHASA

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: KINSHASA

Market: ZAIRE

Sector : POWER & ENERGY EQUIP. & SERV.

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	150.00 \$M	150.00 \$M	150.00 \$M	143.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.00 \$M	2.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	0.01 %

Major Competing Countries

Market Share

BELGIUM	20.00 %
ITALY	15.00 %
UNITED STATES OF AMERICA	10.00 %
FRANCE	5.00 %

Products/services for which there are good market prospects:

1. CONSTRUCTION LIGNE HAUTE-TENSION INGA-KINSHASA
2. CONSTRUCTION LIGNE HAUTE-TENSION KULWEZI-KANANGA
3. MISE EN PLACE DES RESEAUX DE DISTRIB EQUI DE CONTR

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Import duties are low
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- CIAA programs
- Competitive pricing
- Strong sectoral capability in Canada

Factors for Canadian exports not reaching market potential:

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

29/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: KINSHASA

Market: ZAIRE

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

Activity: MISSIONS AU ZAIRE
Expected Results: VENTE DE MATERIELS

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

PROJET RESEAU BASSE TENSION UTEXCO	Approximate Value: 4 M\$ Financing Source : Contact : AMBASSADE DU CANADA
CONSTRUCTION DE LA 2EME LIGNE INGA-KINSHASA	Approximate Value: 40 M\$ Financing Source : OTHER Contact : AMBASSADE DU CANADA
CONSTRUCTION LIGNE HAUTE TEN- SION KOLWEZI-KANANGA & SERVICE	Approximate Value: 91 M\$ Financing Source : OTHER Contact : AMBASSADE DU CANADA
PROJET HYDRO-ELECTRIQUE KANGU- NIZI AU BURUNDI, ETUDES FAISAB.	Approximate Value: 20 M\$ Financing Source : OTHER Contact : AMBASSADE DU CANADA

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: KINSHASA

Market: ZAIRE

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	85.00 \$M	95.00 \$M	110.00 \$M	130.00 \$M
Canadian Exports	0.55 \$M	0.65 \$M	18.00 \$M	15.00 \$M
Canadian Share of Market	0.00 %	0.50 %	16.00 %	12.00 %

Major Competing Countries

Market Share

GERMANY WEST	35.00 %
FRANCE	30.00 %
JAPAN	25.00 %
ENGLAND	20.00 %

Products/services for which there are good market prospects:

1. MATERIEL D'ENTRETIEN ROUTIER
2. LOCOMOTIVES 2400 CV ET LOCOMOTIVES DE MANOEUVRES
3. RAILS DE CHEMIN DE FER
4. CAMION CLASSE B
5. REMORQUES
6. TURBO PROP.
7. TRANSPORTS AERIEN ET FERROVIAIRES,SERV.ASSIST.TECH
8. WAGONS 48 T.,SYSTEMES CONTROL GARE
9. BOURRAGE 500 T.
10. REMORQUES 1000 CV
11. ASSISTANCE TECHNIQUE ET FORMATION
12. BOUREUSES, REGALEUSES

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Import duties are low
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Competitive pricing
- Strong sectoral capability in Canada

29/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: KINSHASA

Market: ZAIRE

Factors for Canadian exports not reaching market potential:

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

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

Activity: VISITE DE LIAISON AU CONGO, RWANDA ET BURUNDI
Expected Results: EVALUE LE MARCHE

29/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: KINSHASA

Market: ZAIRE

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

PROJET REHABILITATION DES CHEMINS DE FER	Approximate Value: 153 M\$ Financing Source : OTHER Contact : AMBASSADE DU CANADA
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REHABILITATION & RENOVATION DES INFRASTR.& EQUIP DES PORTS	Approximate Value: 0 M\$ Financing Source : Contact : AMBASSADE DU CANADA
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REHABILITATION DES EQUIP DE CHANTIER NAVAL (ONATRA)	Approximate Value: 100 M\$ Financing Source : Contact : AMBASSADE DU CANADA
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CONTENEURNISATION DE LA VOIE NATIONALE	Approximate Value: 0 M\$ Financing Source : Contact : AMBASSADE DU CANADA
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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: KINSHASA

Market: ZAIRE

Sector : MINE, METAL, MINERAL PROD & SRV

Sub-Sector: EQUIPMENT AND MACHINERY

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	250.00 \$M	250.00 \$M	300.00 \$M	400.00 \$M
Canadian Exports	2.50 \$M	2.50 \$M	3.50 \$M	7.00 \$M
Canadian Share of Market	0.01 %	0.01 %	0.01 %	2.00 %

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

Major Competing Countries	Market Share
SOUTH AFRICA	35.00 %
GERMANY WEST	25.00 %
BELGIUM	20.00 %
SWEDEN	10.00 %
UNITED STATES OF AMERICA	10.00 %
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. AFFINAGE DU CUIVRE, EQUIPEMENT
2. CONCENTRATEURS, EQUIPEMENTS MINIERES
3. MATERIEL DE CHEMIN DE FER
4. VEHICULES MINIERES
5. SYSTEMES CONCASSEURS
6. SYSTEMES CONVOYEURS
7. PIECES DE RECHANGES
8. EQUIPEMENTS D'EXTRACTIONS
9. SERVICE ENGINEERING
10. ASSISTANCE TECHNIQUE

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: KINSHASA

Market: ZAIRE

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Import duties are low
- Aggressive marketing
- PEMU support
- Fairs and Missions support
- Competitive pricing
- Strong sectoral capability in Canada

Factors for Canadian exports not reaching market potential:

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

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

Activity: MISSION AU ZAIRE
Expected Results: VENTE DE MATERIEL 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: ASSISTANCE A GECAMINE POUR PROSPECTION AU CDA
Expected Results: OUVERTURE D'UN BUREAU D'ACHAT AU CDA

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: LAGOS

Country: NIGERIA

WHILE THE WORLD BANK ENDORSED 2 YEAR STRUCTURAL ADJUSTMENT PROGRAMME (SAP) WAS TO END IN JULY 1988, IT IS RECOGNIZED THAT, DESPITE PROGRESS MADE, ADJUSTMENT MUST EXTEND TO THE END OF THE DECADE. THE POLITICAL COSTS MOUNT AND DEMONSTRATIONS RESULTED FROM DROPS IN STANDARD OF LIVING, PRICE INCREASES, LOWERING OF SUBSIDIES, AND "STRUCTURAL ADJUSTMENT FATIGUE". NEVERTHELESS, THERE IS CONFIDENCE THAT MILITARY GOVERNMENT WILL PERSEVERE WITH ITS REFORM POLICIES WHILE PAVING THE WAY FOR A CIVILIAN DEMOCRACY IN 1992. CRITICAL PROBLEMS FACING NIGERIA INCLUDE THE CURRENT ACCOUNT DEFICIT AND ACCESS TO FOREIGN EXCHANGE. THE CENTRAL BANK OF NIGERIA (CBN) HAS HAD DIFFICULTY FUNDING THE US\$120 MILLION FORTNIGHTLY FOREIGN EXCHANGE MARKET (FEM) AUCTIONS. THIS IS LARGELY DUE TO DROP IN OIL PRICES, LOW RETURNS ON NON-OIL EXPORTS, AND SHORTFALLS IN EXTERNAL FINANCING. DEMAND FOR FOREIGN EXCHANGE HAS INCREASED AS MINISTRIES AND PARASTATALS NO LONGER HAVE GUARANTEED ACCESS TO HARD CURRENCY. INCREASED PRESSURE ON THE PARALLEL AUTONOMOUS MARKET HAS DRIVEN DOWN THE VALUE OF THE NAIRA. WHEREAS, EARLIER, THE FEM AND AUTONOMOUS RATES WERE IN LINE, BY MARCH THEY WIDENED TO 4.8 AND 6.9 / US\$ RESPECTIVELY. THIS TRIGGERED FOREIGN EXCHANGE ARBITRAGING AND UNDERMINED EFFORTS TO STIMULATE INVESTMENT. INDICATIONS POINT TO THE ABOLITION OF THE FEM FOR A MARKET DRIVEN AUTONOMOUS INTERBANK RATE. THIS SHOULD URGE THE RATE TO A MORE REALISTIC 6.0/US\$ AND LIMIT OVERVALUATION BY THE CBN. EDC HAS SIGNED ITS BILATERAL RESCHEDULING OF OUTSTANDING DEBT; HOWEVER, IT CONTINUES TO REMAIN OFF-COVER FOR BOTH EXPORT FINANCING AND INSURANCE. THERE IS NO CIDA BILATERAL FUNDING AVAILABLE, HOWEVER MULTILATERAL AND BILATERAL AID FLOWS IN GENERAL ARE INCREASING, PARTICULARLY IN LIGHT OF NIGERIA'S IDA ELIGIBILITY AND INCREASING OECD DONOR COORDINATION. BY YEAR END ALL PARIS CLUB RESCHEDULINGS SHOULD BE SIGNED, ENABLING MEMBER COUNTRIES TO RESUME EXPORT CREDIT COVER AS THE US AND W.GERMANY HAVE ALREADY DONE. DEMAND FOR EXPORT CREDITS IS HEAVY, AND LACK OF SUCH CREDIT HAS IMPEDED CANADIAN EFFORTS TO PENETRATE THIS MARKET. THERE WILL BE LITTLE "NEW MONEY" AVAILABLE FOR CANADIAN EXPORTERS OTHER THAN THAT CHANNELLED THROUGH WORLD BANK PROJECTS. DESPITE FINANCIAL PROBLEMS, THERE ARE STILL OPPORTUNITIES FOR TRADE AND INVESTMENT. THE GDN HAS BEGUN LIBERALIZING THE ECONOMY AND ATTRACTING INVESTMENT. THERE IS ENHANCED ENTHUSIASM FOR INVESTMENT AS A RESULT OF THE NEW DEBT-EQUITY CONVERSION PROGRAMME AND THE PRIVATIZATION OR COMMERCIALIZATION OF APPROXIMATELY 30 STATE HELD ENTERPRISES. IMPORT REGULATIONS HAVE BEEN REVISED AND THE NIGERIAN ENTERPRISES PROMOTION DECREE HAS BEEN AMENDED TO RAISE THE MAXIMUM LIMIT FOR FOREIGN OWNERSHIP IN A COMPANY FROM 60% TO 80% IN SUCH AREAS AS AGRICULTURE, DISTILLING, CHEMICALS AND PLASTICS, AND MACHINERY MANUFACTURING. OPPORTUNITIES CONTINUE TO PRESENT THEMSELVES; HOWEVER, CANADIAN COMPANIES NEED TO VIEW THE MARKET FIRST HAND AND ESTABLISH PERSONAL CONTACT WITH THE NIGERIAN PRIVATE SECTOR. NIGERIA IS STILL SEEN AS ONE OF AFRICA'S MOST PROMISING MARKETS AND BUSINESS PROSPECTS HERE MUST BE SEEN IN THE MEDIUM TO LONG TERM.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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 reasons:

1. TRANSPORT SYS, EQUIP, COMP, SERV.
KEY FOCUS OF STRUCTURAL ADJUSTMENT RECEIVING HIGH PRIORITY FROM GOV'T AND MULTILATERAL AGENCIES. PRELIMINARY IBRD RAIL SECTOR STUDY INDICATES SIGNIFICANT NEED FOR NEW MOTIVE POWER, REHABILITATION AND CONSULTING SERVICES. CANADA CURRENTLY IN STRONG POSITION FOR ALL THESE.
2. POWER & ENERGY EQUIP. & SERV.
CRITICAL TO STRUCTURAL ADJUSTMENT AND INFRASTRUCTURE DEVELOPMENT. WILL RECEIVE SIGNIFICANT AMOUNT OF IFI FUNDING. FUTURE OPPORTUNITIES FOR EQUIPMENT, SPARES, AND CONSULTING SERVICES.
3. ADVANCED TECH. PROD. & SERV
COMMUNICATIONS CRITICAL TO DEVELOPMENT AND LIKELY TO RECEIVE MULTI AND BILATERAL SUPPORT FOR BOTH URBAN AND RURAL SYSTEMS. GROWTH OF OPPORTUNITIES ESPECIALLY AMONG LARGE COMPANIES FOR COMPUTING AND INFORMATION TECHNOLOGIES AND FOR CONSULTING SERVICES.
4. OIL & GAS EQUIPMENT, SERVICES
CONTINUED IMPORTANCE OF PETROLEUM SECTOR TO ECONOMY AND ANTICIPATED COMMENCEMENT OF MAJOR PROJECTS (CONDENSATE, LNG AND PETROCHEMICALS), PLUS RENEWED EXPLORATION SIGNIFY OPPORTUNITIES FOR CANADA.
5. AGRI & FOOD PRODUCTS & SERVICE
IDENTIFIED AS PRIORITY FOR STRUCTURAL ADJUSTMENT AND DEVELOPMENT OF NON-OIL SECTOR. HIGH DEGREE OF GOV'T AND MULTILATERAL SUPPORT PLUS SECURE IFI FINANCING. OPPORTUNITIES IN; STORAGE SYSTEMS/TECHNOLOGY; IRRIGATION AND WATER SYSTEMS; FOOD PRODUCTS (INCL. FISH) AND PROCESSING.

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

- | | |
|-------------------------------------|--------------------------------------|
| 1. CHEM PROD & PETROCHEM, EQP, SERV | 4. GRAINS AND OILSEEDS |
| 2. INDUSTRIAL MACHIN, PLANTS, SERV. | 5. ADVANCED TECH. PROD. & SERV |
| 3. ADVANCED TECH. PROD. & SERV | 6. TRANSPORT SYS, EQUIP, COMP, SERV. |

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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 (Estimated)	Next Year (Projected)
Market Size	0.00 \$M	0.00 \$M	20.00 \$M	20.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	10.00 \$M	10.00 \$M
Canadian Share of Market	0.00 %	0.00 %	50.00 %	50.00 %

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

Major Competing Countries Market Share

FRANCE	10.00 %
UNITED STATES OF AMERICA	30.00 %
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
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada

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

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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: ENCOURAGE CDN COMP. TO REGISTER W/GHANA NAT PROCUREMENT AGEN
Expected Results: COMPANIES WILL RECEIVE TENDERS, BID AND SECURE EXPORT SALES

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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 (Estimated)	Next Year (Projected)
Market Size	0.00 \$M	15.00 \$M	35.00 \$M	40.00 \$M
Canadian Exports	0.00 \$M	0.75 \$M	2.60 \$M	3.00 \$M
Canadian Share of Market	0.00 %	5.00 %	7.50 %	7.50 %

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

Major Competing Countries Market Share

UNITED KINGDOM	60.00 %
UNITED STATES OF AMERICA	12.00 %
JAPAN	15.00 %
OTHER COUNTRIES	6.00 %

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. SAWMILLING EQUIPMENT
3. SPARE PARTS
4. CONSULTING SERVICES

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Limited appreciation/understanding of distribution system

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LAGOS

Market: GHANA

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

Activity: FORESTRY SECTOR STUDY TO DET. OPPORT. FOR CAN GOODS & SERVICE
Expected Results: DEVELOP MARKET PENETRATION STRATEGY AND INTRODUCE 3 NEW
CANADIAN FIRMS.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LAGOS

Market: GHANA

Sector : MINE, METAL, MINERAL PROD & SRV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	0.00 \$M	0.00 \$M	40.00 \$M	60.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	5.00 \$M	10.00 \$M
Canadian Share of Market	0.00 %	0.00 %	12.50 %	16.60 %

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

Major Competing Countries Market Share

UNITED KINGDOM	70.00 %
FRANCE	2.50 %
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. DRILLING CONSUMABLES
2. CONVEY OR DRIVES
3. UNDERGROUND LOCUS
4. RAISE BORING CONSUMABLES
5. DRILLING EQUIPMENT
6. ROCKER SHUVELS
7. MOBILE CRANES
8. COMPRESSORS
9. DIESEL GENERATORS
10. MINE HOISTS
11. PROFESSIONAL SERVICES

Factors contributing to current successful Canadian exports:

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

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LAGOS

Market: GHANA

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Non-competitive financing
- PROBLEM OF ADAPT OF MKT TECH TO MKT
- BY CDN EXPORT EXECUTIVES.

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

REHABILITATION PROGRAMME FOR
MINING SECTOR

Approximate Value: 140 M\$

Financing Source : IBRD - World Bank
OTHER

Contact : CANADIAN HIGH COMMISSION

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LAGOS

Market: NIGERIA

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	244.00 \$M	179.06 \$M	200.00 \$M	250.00 \$M
Canadian Exports	7.70 \$M	0.54 \$M	0.80 \$M	1.50 \$M
Canadian Share of Market	2.33 %	0.30 %	0.40 %	0.60 %

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

Major Competing Countries Market Share

ROMANIA	16.00 %
GERMANY WEST	8.00 %
AUSTRIA	3.00 %
UNITED KINGDOM	15.00 %
ITALY	5.00 %

Products/services for which there are good market prospects:

1. IRRIGATION/WATER EQUIP'T & SERVICES
2. GRAINS STORAGE EQUIPMENT SERVICES
3. CONSULTING SERVICES
4. MILK (POWDER/CANNED)

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

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

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LAGOS

Market: NIGERIA

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

Activity: HOWE INT'L CONSULTANCY ON NAT'L STRATEGIC GRAINS RESERVE
Expected Results: SUCCESSFUL IN PLACING CDA IN GOOD POSITION FOR PHASE II CONTRACTS.

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

Activity: SUPPORT HOWE INT'L PROPOSAL FOR A MAINT. FOR NAT'L STRATEGIC
Expected Results: PROPOSAL APPROVAL AND HIGHER PROFILE FOR CDA IN GRAINS STORAGE.

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LAGOS

Market: NIGERIA

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

SECOND MULTISTATE AGRICULTURAL DEVELOPMENT PROJECTS	Approximate Value:	85 M\$
	Financing Source :	IBRD - World Bank
	Contact :	POST

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LAGOS

Market: NIGERIA

Sector : ADVANCED TECH. PRODD. & SERV

Sub-Sector: TELECOM, DATACOM, SAT, SPACECOM

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	27.10 \$M	39.30 \$M	42.00 \$M	50.00 \$M
Canadian Exports	1.30 \$M	1.50 \$M	2.00 \$M	3.00 \$M
Canadian Share of Market	5.20 %	3.80 %	4.80 %	6.00 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	20.00 %
SWEDEN	14.00 %
JAPAN	9.00 %
UNITED KINGDOM	7.00 %
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 SYSTEMS
2. CONSULTING SERVICES
3. DATA COMMUNICATIONS SYSTEMS
4. EARTH STATIONS
5. SWITCHES, EXCHANGES, PABX
6. HANDSETS
7. SPARES AND PARTS

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LAGDS

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
- LENGTHY PROJ APPROVAL, CONTRACT
- NEGOTIATION, FUNDING & PROCUREMENT PROCESS

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

Activity: ASSISTANCE TO SPAR IN PURSUIT OF REHAB OF 2 EXISTING INTNL
Expected Results: SPAR WILL BE SUCCESSFUL BIDDER

Activity: ASSIST TO SPAR IN BID FOR REHAB OF DOMSAT EARTH STATION
Expected Results: SPAR WILL BE SUCCESSFUL BIDDER

Activity: ASSESS OF W/BIRD COMMISSIONED STUDIES OF SECTOR TO DET. OPPORT
Expected Results: INTRODUCTION OF NEW CANADIAN FIRMS TO MARKET.

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

Activity: TELECOMMUNICATIONS MISSION 05/88
Expected Results: DEFERRED TO 1989. SUCCESSFUL PROMOTION OF CANADIAN TECHNOLOGY.

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

Activity: SEMINAR PROGRAMME TO COINCIDE WITH MISSION
Expected Results: ENHANCE CANADA'S IMAGE AS ALTERNATIVE SUPPLIER.

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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 still in the planning stage which provide opportunities for Canadian suppliers:

COMMUNICATIONS SECTOR LOAN

Approximate Value: 0 M\$
Financing Source : IBRD - World Bank
Contact :

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LAGOS

Market: NIGERIA

Sector : POWER & ENERGY EQUIP. & SERV.

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	118.00 \$M	138.00 \$M	200.00 \$M	300.00 \$M
Canadian Exports	0.06 \$M	0.06 \$M	1.40 \$M	10.00 \$M
Canadian Share of Market	0.05 %	0.04 %	0.70 %	3.00 %

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

Major Competing Countries	Market Share
UNITED KINGDOM	19.33 %
GERMANY WEST	12.67 %
UNITED STATES OF AMERICA	10.33 %
JAPAN	15.23 %
BULGARIA	12.19 %

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

Products/services for which there are good market prospects:

1. SPARE PARTS
2. TRANSFORMERS
3. GENERATORS
4. TRANSMISSION LINES/TOWERS
5. TURBINES
6. SWITCH GEAR

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 financing
- LACK EDC AND CIDA SUPPORT

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LAGOS

Market: NIGERIA

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

Activity: SUPPORT FED. PIONEER & MARKHAM ELEC. IN NEG. ON 132 TRANS LI
Expected Results: CANADIAN WILL BE SUCCESSFUL IN BEING AWARDED PART OF TOTAL PROJECT.

Activity: SUPPORT FED. PIONEER & LOCAL REP IN DEV. A PROPOSAL FOR REP
Expected Results: PROPOSAL APPROVAL PENDING FINANCING.

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

Activity: SUPPORT ONT. HYDRO IN THEIR BID TO LINK NEPA ON IBRD FUNDED
Expected Results: ONTARIO HYDRO WILL RE-ESTABLISH A STRONG CDN PRESENCE IN SECTOR.

Activity: SUPPORT CGE & ACRES ON CDN\$70M AKOSOMBO DAM REHAB. PROJ.
Expected Results: SALE OF UP TO CDN \$ 32M IN EQUIPMENT & SERVICES.

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LAGOS

Market: NIGERIA

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

IBRD POWER VII LOAN TO COVER
EQUIPMENT & SERVICES

Approximate Value: 800 M\$
Financing Source : IBRD - world Bank
Contact : POST

330KV TRANSMISSION, RURAL
ELECTRIFICATION PROJECT.

Approximate Value: 270 M\$
Financing Source : OTHER
IBRD - world Bank
AFDB - African Devlpmt Bank
Contact : POST

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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 (Estimated)	Next Year (Projected)
Market Size	6.00 \$M	259.40 \$M	270.00 \$M	350.00 \$M
Canadian Exports	0.07 \$M	0.06 \$M	2.00 \$M	10.00 \$M
Canadian Share of Market	1.13 %	0.20 %	0.74 %	3.00 %

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

Major Competing Countries Market Share

FRANCE	21.00 %
UNITED KINGDOM	10.00 %
GERMANY WEST	7.00 %
JAPAN	12.00 %
UNITED STATES OF AMERICA	8.00 %

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

Products/services for which there are good market prospects:

1. LOCOMOTIVES
2. SPARES
3. CONSULTING SERVICES
4. RAILWAY COMMUNICATIONS AND SIGNALLING EQUIPMENT

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

Factors for Canadian exports not reaching market potential:

- Non-competitive financing

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LAGOS

Market: NIGERIA

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

Activity: FINALIZE EDC FINANCING PKG FOR CONTRACT AWARDED TO BOMBARDIE
Expected Results: CONCLUDE SALE OF \$110M IN EQUIPT, ESTABLISH LONG TERM
CDN PRESENCE.

Activity: CONTINUE TO SUPPORT CANAC IN WORLD BANK FUNDED SPARE PARTS
Expected Results: CONCLUDE SALE UP TO \$10M IN EQUIPT & SERVICES.

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 DEBATE ON MASS TRANSIT IMPLM. PLAN WHICH MAY PROVIDE
Expected Results: ALERT CANADIAN COMPANIES TO ANY OPPORTUNITIES PRESENTED.

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LAGOS

Market: NIGERIA

Sector : OIL & GAS EQUIPMENT, SERVICES

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	11.40 \$M	21.90 \$M	31.30 \$M	41.70 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.40 \$M	1.50 \$M
Canadian Share of Market	0.00 %	0.00 %	1.30 %	3.60 %

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

Major Competing Countries	Market Share
UNITED KINGDOM	30.00 %
GERMANY WEST	21.00 %
UNITED STATES OF AMERICA	17.00 %
NETHERLANDS	7.00 %
FRANCE	5.00 %

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

Products/services for which there are good market prospects:

1. EXPLORATION EQUIPMENT & SERVICES
2. DRILLING TOOLS
3. CONSUMABLES
4. PIPELINE EQUIPMENT
5. CLEAN-UP EQUIPMENT
6. CONSULTING SERVICES

Factors contributing to current successful Canadian exports:

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

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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: ASSISTANCE TO SITE OIL AS FOLLOW UP TO NPS 88
Expected Results: VISIT TO NIGERIA FOR DEMONSTRATION AND SUBSEQUENT SALE OF EQUIPMENT.

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 THE DEV. ON PHASE II OF IBRD FUND PETROCHEMICAL
Expected Results: ALERT CANADIAN COMPANIES OF PROJECTS AND BIDS FOR BOTH PROPOSALS.

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LAGOS

Market: NIGERIA

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

OSO CONDENSATE DEV. PROJECT	Approximate Value: 900 M\$
	Financing Source : IBRD - World Bank
	OTHER
	Contact : POST
LNG PLANT	Approximate Value: 0 M\$
	Financing Source : IBRD - World Bank
	OTHER
	Contact : POST
ELEME PETROCHEMICALS PLANT	Approximate Value: 0 M\$
	Financing Source : OTHER
	Contact : POST
NNPC GAS PIPELINES (556.5 KM)	Approximate Value: 0 M\$
	Financing Source : OTHER
	Contact : POST

89/06/12 RP-ALU PEMD - Government Initiated Activities 1989

109A)

Post : LAGOS

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Post/Contact</u>
89/06/10	VISIT OF CHIEF ARTHUR MBANEFO OF NIGERIA MISSION IN, TO INDUSTRY	GENERAL OR UNASSIGNED ISB

RPTBL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: ACCRA

Country: GHANA

IN 1988 THE PNDC GOVERNMENT CONTINUED TO RECEIVE STRONG DONOR SUPPORT FOR THE SECOND PHASE OF ITS AMBITIOUS ECONOMIC RECOVERY PROGRAMME (ERP). IT AIMED AT INTRODUCING DEEPER STRUCTURAL REFORMS INTO THE GHANAIAN ECONOMY. PARTICULAR ATTENTION IS BEING PAID TO THE FINANCIAL, AGRICULTURAL, EDUCATION, HEALTH AND INDUSTRIAL SECTORS IN ORDER TO ENHANCE CONDITIONS FOR GROWTH. WHILE THE ERP HAS REGISTERED IMPRESSIVE GAINS IN SOME SECTORS CONCERNS HAVE BEEN EXPRESSED RECENTLY, BY GOVERNMENT AND DONORS ALIKE, THAT THE GOVERNMENT IS INCREASINGLY UNABLE TO COPE WITH THE LARGE AMOUNT OF FOREIGN ASSISTANCE (AND CONDITIONS) FROM A RANGE OF DONORS AND THAT, DESPITE THE INFLOW OF MILLIONS OF DOLLARS SINCE 1983, FEW TANGIBLE BENEFITS ARE YET EVIDENT AT THE GRASS-ROOTS LEVEL. THE LACK OF PRIVATE INVESTMENT IS ALSO CAUSE FOR SERIOUS CONCERN. THERE IS GROWING EVIDENCE TO SUGGEST THAT THE GOVERNMENT IS RE-EXAMINING ITS ECONOMIC POLICY, PARTICULARLY WITH REGARD TO WAGES AND THE EDUCATION, HOUSING, HEALTH AND TRANSPORTATION SECTORS. INCREASED CONCERN HAS BEEN EXPRESSED OVER THE COUNTRY'S LARGE FOREIGN DEBT, HOWEVER, THERE ARE NO INDICATIONS THAT THE PNDC IS PREPARED TO RETREAT FROM THE IMF LED ERP. WITH THE POOR PRICE PERFORMANCE OF COCOA, THE MAJOR TRADITIONAL EXPORT, IT SEEMS MOST UNLIKELY THAT THE 5 PERCENT GDP GROWTH TARGET WILL BE ACHIEVED, ALTHOUGH A STRONG GROWTH WAS REGISTERED IN THE GOLD AND TIMBER SECTORS. GOOD POTENTIAL FOR THE EXPORT OF CANADIAN GOODS AND SERVICES EXIST IN THESE SECTORS. GOOD RAINS THROUGHOUT MOST OF THE COUNTRY HAVE LED TO IMPROVED CROP CONDITIONS. NEVERTHELESS, OPPORTUNITIES FOR THE SALE OF WHEAT, EDIBLE OILS AND FISH CONTINUE. THE GOVERNMENT WILL CONTINUE TO PLACE HIGH EMPHASIS ON AGRICULTURAL DEVELOPMENT AND, APART FROM THE SALE OF FERTILIZERS, THERE WILL BE A MARKET FOR SELECTED GOODS AND SERVICES. WHILE THE FOCUS WILL BE ON PROMOTING CANADIAN INVOLVEMENT IN THE MINING, FORESTRY AND AGRICULTURE SECTORS, ADDITIONAL OPPORTUNITIES WILL EXIST IN THE PETROLEUM SECTOR, THROUGH THE INVOLVEMENT OF PCIAC AND IN THE REHABILITATION OF THE AKOSOMBO DAM BY THE VOLTA RIVER AUTHORITY. IN TOGO AND BENIN CANADA REPRESENTS A VIABLE ALTERNATIVE TO THE DOMINANCE OF FRENCH BY OFFERING NORTH AMERICAN TECHNOLOGY AND SKILLS IN ENGLISH AND FRENCH.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 EXPORT PROMOTION PRIORITIES

Mission: ACCRA

Country: GHANA

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

1. GRAINS AND OILSEEDS
BREAD IS BECOMING A STABLE FOOD AND THE COUNTRY DOES NOT GROW WHEAT. CANADIAN WHEAT IS MUCH APPRECIATED. PEOPLE HAVE CULTIVATED TASTE FOR CANOLA OIL.
2. MINE, METAL, MINERAL PROD & SRV
THERE IS AN INTERNATIONAL FUNDING OF US\$120 MILLION TOWARDS REHABILITATION AND ALREADY CANADA HAS SENT A MINING MISSION TO ASSESS POTENTIAL.
3. FOREST PRODUCTS, EQUIP, SERVICES
GOVERNMENT NOW PLACES MUCH EMPHASIS ON EXPORT OF VALUE ADDED FOREST PRODUCTS, THUS CREATING NEED FOR SUPPLY AND REHABILITATION OF SAW-MILLS, DRYING KILNS, MOULDING EQUIPMENT, ETC.

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

1. GRAINS AND OILSEEDS
2. FOREST PRODUCTS, EQUIP, SERVICES
3. MULTIPLE SECTORS

RPT81

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: LIBREVILLE

Country: GUINEA

LA FORTE BAISSSE DU PRODUIT INTERIEUR BRUT (PIB) ENREGISTREE EN 1986 (-29%) ET POURSUIVIE EN 1987 (-14%) DEVRAIT S'ATTENUER EN 1988(+5%). CETTE LEGERE REPRISE DE LA CROISSANCE ECONOMIQUE EST ESSENTIELLEMENT SOUTENUE PAR UN ACCROISSEMENT IMPORTANT DES INVESTISSEMENTS PETROLIERS ET PAR LA FORTE AUGMENTATION EN VOLUME DE LA PRODUCTION DE PETROLE EN 1989. EN EFFET, LA PRODUCTION DE PETROLE DU GISEMENT ON-SHORE DE RABI-KOUNGA (SUD DU GABON) COMMENCERA EN JANVIER 1989, SOIT 5 MOIS AVANT LES DELAIS PREVUS. LA PRODUCTION PASSERA DE 15 A 20.000 BARILS/JOUR PROGRESSIVEMENT EN AOUT A 80.000 BARILS/JOUR JUSQU'A UNE CAPACITE MAXIMALE DE 120.000 BARILS/JOUR EN 1990. CE RYTHME DE 6 MILLIONS DE TONNES PAR AN REPRESENTE UNE AUGMENTATION DE 75% DE LA PRODUCTION PREVUE EN 1988. APRES 2 ANNEES CONSECUTIVES, 1986 ET 1987, MARQUEES PAR DES DESEQUILIBRES FINANCIERS IMPORTANTS SUITE A L'EFFONDREMENT DES COURS DE PETROLE ET DU DOLLAR, LA POLITIQUE BUDGETAIRE EN 1988 ET EN 1989 VISE AU RETOUR DE L'EQUILIBRE DES FINANCES PUBLIQUES. LES RECETTES PROPRES DU PAYS QUI ETAIENT DE 632 MILLIARDS DE FCFA EN 1985 VONT CONTINUER DE DIMINUER EN 1988 A 265 MILLIARDS FCFA. L'EQUILIBRE BUDGETAIRE SERA ATTEINT PAR DES EMPRUNTS DE 155,8 MILLIARDS DE FCFA EN 1988 COMPARATIVEMENT A 197,5 MILLIARDS DE FCFA EN 1987. LES EMPRUNTS EN 1989 S'ETABLIRONT A 120,0 MILLIARDS FCFA. LES DEPENSES PUBLIQUES SONT REQUISES EN 1988 DE 43 MILLIARDS. ELLES SERONT DE 420,8 MILLIARDS EN 1988 ET 405,0 MILLIARDS EN 1989. LES DEPENSES DE FONCTIONNEMENT SONT MAINTENUES AU NIVEAU DE 182,0 MILLIARDS EN 1988 ET 1989, EN DIMINUTION DE 16,0 MILLIARDS PAR RAPPORT A 1987. LES DEPENSES D'INVESTISSEMENT PASSENT DE 91,8 A 83,0 MILLIARDS DE FCFA EN 1988. LE MEME NIVEAU EST MAINTENU EN 1989. LES INVESTISSEMENTS ETAIENT DE 403,5 ET 324,7 MILLIARDS DE FCFA EN 1985 ET 1986 RESPECTIVEMENT. LA DIFFERENCE DE 155,8 MILLIARDS REPRESENTE LE SERVICE DE LA DETTE EN 1988. LES PRETS D'AJUSTEMENT STRUCTUREL OBTENUS DE LA BANQUE MONDIALE ET DE LA BANQUE AFRICAINE DE DEVELOPPEMENT NE SONT PAS RELIES A DE NOUVEAUX PROJETS MAIS ONT POUR BUT DE COMBLER LE DEFICIT DU BUDGET DE L'ETAT. CES PRETS SONT ASSORTIS DE CONDITIONS, DONT LA REALISATION D'ETUDES DANS LES DOMAINES DE L'AGRICULTURE ET DE LA FORESTERIE. CES BANQUES, SEMBLE-T-IL, AURAIENT DES FONDS DE 600 MILLIONS DE DOLLAR U.S.A CONSACRER AU PAYS DANS LES PROCHAINES ANNEES, INCLUANT DES PRETS SUBSEQUENTS D'AJUSTEMENT STRUCTUREL. AUCUN NOUVEAU PROJET D'INVESTISSEMENT PUBLIC NE SERA ENTREPRIIS AU GABON AVANT LA FIN DE 1989, SAUF LE PROJET D'ENTRETIEN ROUTIER (3150 A 200 MILLIONS) DONT LE PRINCIPAL BAILLEUR DE FONDS SERA LA BANQUE MONDIALE. LE PAYS PREVOIT TOUTEFOIS CONSACRER MOINS DE RESSOURCES POUR LE TRANSGABONAIS, EN 1990, ET POURRAIT AINSI ETRE EN MESURE DE FINANCER DE NOUVEAUX PROJETS. LES ANNEES 1988 ET 1989 APPARAISSENT DONC COMME UNE PHASE DE CONSOLIDATION DES EFFORTS ENGAGES EN VUE DE RETABLIR LES GRANDS EQUILIBRES DE L'ECONOMIE GABONAISE ET DE PROCEDER AUX AJUSTEMENTS STRUCTURELS JUGES NECESSAIRES. LES EFFETS ESCOMPTEES DES MESURES QUI, CONJOINTEMENT A CET ASSAINISSEMENT DE LA SITUATION, DEVRAIENT PERMETTRE LE RETOUR A UNE CROISSANCE DURABLE ET PROMOUVOIR LA DIVERSIFICATION DE L'ECONOMIE, NE PRODUIRONT DES RESULTATS, DANS LE MEILLEUR CAS, QU'A MOYEN TERME. LA CRISE ECO-

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RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: LIBREVILLE

Country: GUINEA

NOMIQUE QUE VIT LE GABON DEPUIS 1986 AURA EU DES EFFETS BENEFIQUES POUR LE PAYS. PARMIS LES MESURES PROMETTEUSES QUI ONT ETE INSPIREES PAR LA CRISE FIGURENT LA PRIORITE DESORMAIS RECONNUE A L'AGRICULTURE (FORESTERIE, PECHE-RIES), LA PROMOTION DE PETITES ET MOYENNES ENTREPRISES, LA RESTRUCTURATION DONT LA COMPETENCE EST LE GARANT DES ENJEUX FUTURES. OUTRE LES ACTIVITES DEJA EN COURS ET CE QUI POURRAIT S'ENSUIVRE, CE SONT LA, AVEC LE SECTEUR ROUTIER, LES DOMAINES D'INTERET PREPONDERANT POUR LA COOPERATION COMMERCIALE CANADIENNE DANS LES QUELQUES ANNEES A VENIR. SAO TOME/PRINCIPE ET LA GUINEE EQUATORIALE, LES DEUX AUTRES PAYS D'ACCREDITATION SONT DESORMAIS TOURNES VERS UNE ECONOMIE DE MARCHÉ. EN DEBIT DE LA PAUVRETE EXTREME DE CES PAYS, LE CANADA N'Y A PAS DE PROGRAMME D'AIDE BILATERALE. IL EXISTE NEANMOINS DES POSSIBILITES DE RETOMBEES COMMERCIALES INTERESSANTES POUR LES SOCIETES CANADIENNES, SOIT A TRAVERS LES FINANCEMENTS DES IFIS, SOIT COMME SUITE A DES ACTIVITES SOUTENUES PAR LA COOPERATION INDUSTRIELLE DE L'ACDI.

RPT81

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: LIBREVILLE

Country: GABON

LA FORTE BAISSSE DU PRODUIT INTERIEUR BRUT (PIB) ENREGISTREE EN 1986 (-29%) ET POURSUIVIE EN 1987 (-14%) DEVRAIT S'ATTENUER EN 1988 (+5%). CETTE LEGERE REPRISE DE LA CROISSANCE ECONOMIQUE EST ESSENTIELLEMENT SOUTENUE PAR UN ACCROISSEMENT IMPORTANT DES INVESTISSEMENT PETROLIER ET PAR LA FORTE AUGMENTATION EN VOLUME DE LA PRODUCTION DE PETROLE EN 1989. EN EFFET, LA PRODUCTION DE PETROLE DU GISEMENT ON-SHORE DE KABI-KOUNGA (SUD DU GABON) COMMENCERA EN JANVIER 1989, SOIT 5 MOIS AVANT LES DELAIS PREVUS. LA PRODUCTION PASSERA DE 15 A 20.000 BARILS/JOUR PROGRESSIVEMENT EN ADUT A 80.000 BARILS /JOUR JUSQU'A UNE CAPACITE MAXIMALE DE 120.000 BARILS/JOUR EN 1990. CE RYTHME DE 6 MILLIONS DE TONNES PAR AN REPRESENTE UNE AUGMENTATION DE 75% DE LA PRODUCTION PREVUE EN 1988. APRES 2 ANNEES CONSECUTIVES, 1986 ET 1987, MARQUEES PAR DES DESEQUILIBRES FINANCIERS IMPORTANTS SUITE A L'EFFONDREMENT DES COURS DE PETROLE ET DU DOLLAR, LA POLITIQUE BUDGETAIRE EN 1988 ET EN 1989 VISE AU RETOUR DE L'EQUILIBRE DES FINANCES PUBLIQUES. LES RECETTES PROPRES DU PAYS QUI ETAIENT DE 632 MILLIARDS DE FCFA EN 1985 VONT CONTINUER DE DIMINUER EN 1988 A 265 MILLIARDS FCFA. L'EQUILIBRE BUDGETAIRE SERA ATTEINT PAR DES EMPRUNTS DE 155,8 MILLIARDS DE FCFA EN 1988 COMPARATIVEMENT A 197,5 MILLIARDS DE FCFA EN 1987. LES EMPRUNTS EN 1989 S'ETABLIRONT A 120,0 MILLIARDS FCFA. LES DEPENSES PUBLIQUES SONT REDUITES EN 1988 DE 43 MILLIARDS. ELLES SERONT DE 420,8 MILLIARDS EN 1988 ET 405,0 MILLIARDS EN 1989. LES DEPENSES DE FONCTIONNEMENT SONT MAINTENUES AU NIVEAU DE 182,0 MILLIARDS EN 1988 ET 1989, EN DIMINUTION DE 16,0 MILLIARDS PAR RAPPORT A 1987. LES DEPENSES D'INVESTISSEMENT PASSENT DE 91,8 A 83,0 MILLIARDS DE FCFA EN 1988. LE MEME NIVEAU EST MAINTENU EN 1989. LES INVESTISSEMENT ETAIENT DE 403,5 ET 324,7 MILLIARDS DE FCFA EN 1985 ET 1986 RESPECTIVEMENT. LA DIFFERENCE DE 155,8 MILLIARDS REPRESENTE LE SERVICE DE LA DETTE EN 1988. LES PRETS D'AJUSTEMENT STRUCTUREL OBTENUS DE LA BANQUE MONDIALE ET DE LA BANQUE AFRICAINE DE DEVELOPPEMENT NE SONT PAS RELIES A DE NOUVEAUX PROJETS MAIS ONT POUR BUT DE COMBLER LE DEFICIT DU BUDGET DE L'ETAT. CES PRETS SONT ASSORTIS DE CONDITIONS, DONT LA REALISATION D'ETUDES DANS LES DOMAINES DE L'AGRICULTURE ET DE LA FORESTERIE. CES BANQUES, SEMBLE-T-IL, AURAIENT DES FONDS DE 600 MILLIONS DE DOLLARS U.S. A CONSACRER AU PAYS DANS LES PROCHAINES ANNEES, INCLUANT DES PRETS SUBSEQUENTS D'AJUSTEMENT STRUCTUREL. AUCUN NOUVEAU PROJET D'INVESTISSEMENT PUBLIC NE SERA ENTREPRIS AU GABON AVANT LA FIN DE 1989, SAUF LE PROJET D'ENTRETIEN ROUTIER (\$150 A 200 MILLIONS) DONT LE PRINCIPAL BAILLEUR DE FONDS SERA LA BANQUE MONDIALE. LE PAYS PREVOIT TOUTEFOIS CONSACRER MOINS DE RESSOURCES POUR LE TRANSGABONNAIS, EN 1990, ET POURRAIT AINSI ETRE EN MESURE DE FINANCER DE NOUVEAUX PROJETS. LES ANNEES 1988 ET 1989 APPARAISSENT DONC COMME UNE PHASE DE CONSOLIDATION DES EFFORTS ENGAGES EN VUE DE RETABLIR LES GRANDS EQUILIBRES DE L'ECONOMIE GABONAISE ET DE PROCEDER AUX AJUSTEMENTS STRUCTURELS JUGES NECESSAIRES. LES EFFETS ESCOMPTES DES MESURES QUI, CONJOINTEMENT A CET ASSAINISSEMENT DE LA SITUATION, DEVRAIENT PERMETTRE LE RETOUR A UNE CROISSANCE DURABLE ET PROMUVOIR LA DIVERSIFICATION DE L'ECONOMIE, NE PRODUIRONT DES RESULTATS, DANS LE MEILLEUR CAS, QU'A MOYEN TERME. LA CRISE ECONOMIQUE QUE

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: LIBREVILLE

Country: GABON

VIT LE GABON DEPUIS 1986 AURA EU DES EFFETS BENEFIOUES POUR LE PAYS. PARMILLES MESURES PROMETTEUSES QUI ONT ETE INSPIREES PAR LA CRISE FIGURENT LA PRIORITE DESORMAIS RECONNUE A L'AGRICULTURE (FORESTERIE, PECHERIES), LA PROMOTION DE PETITES ET MOYENNES ENTREPRISES, LA RESTRUCTURATION DU SECTEUR PETENCE EST LE GARANT DES ENJEUX FUTURS. OUTRE LES ACTIVITES DEJA EN COURS ET CE QUI POURRAIT S'ENSUIVRE, CE SONT LA, AVEC LE SECTEUR ROUTIER, LES DOMAINES D'INTERET PREPONDERANT POUR LA COOPERATION COMMERCIALE CANADIENNE DANS LES QUELQUES ANNEES A VENIR. SAO TOME/PRINCIPE ET LA GUINEE EQUATORIALE, LES 2 AUTRES PAYS D'ACCREDITATION SONT DESORMAIS TOURNES VERS UNE ECONOMIE DE MARCHÉ. EN DEBIT DE LA PAUVRETE EXTREME DE CES PAYS, LE CANADA N'Y A PAS DE PROGRAMME D'AIDE BILATERALE. IL EXISTE NEANMOINS DES POSSIBILITES DE RETOMBÉES COMMERCIALES INTERESSANTES POUR LES SOCIETES CANADIENNES, SOIT A TRAVERS LES FINANCEMENTS DES IFIS, SOIT COMME SUITE A DES ACTIVITES SOUTENUES PAR LA COOPERATION INDUSTRIELLE DE L'ACDI.

RPT82

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 EXPORT PROMOTION PRIORITIES

Mission: LIBREVILLE

Country: GABON

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.

LE GABON CONSACRERA PLUS DE \$150 MILLIONS(DONT \$40.0 MILLIONS SOUS FINANCEMENT BANQUE MONDIALE)A LA REHABILITATION DES ROUTES. DES SPECIALISTES CDN ONT ETE ASSOC.AUX ETUDES DE PREINVESTISSEMENT. LES SOC.CDN SONT DONC BIEN PLACEES POUR LA POURSUITE DES MARCHES FINANCES PAR LA BANQUE MONDIALE.

2. OIL & GAS EQUIPMENT,SERVICES

DEJA DES CADRES ONT RECU UNE FORMATION AU CANADA(H.E.C. MONTREAL ET PETRO-CANADA A CALGARY). DE PLUS DES MCPP ONT ETE ACCORDES PAR LA COOPERATION ACDI POUR DES ETUDES DANS LE SECTEUR PETROLIER.

3. POWER & ENERGY EQUIP. & SERV.

UN 1ER CONTRAT EST EN VOIE D'EXECUTION. LA IIE PHASE DEVRIT SE POURSUIVRE AVEC LE CANADA. DE PLUS LA BAD A DEJA APPROUVE QUELQUES \$35.0 MILLIONS POUR AMELIORER L'ELECTRIFICATION RURALE.

4. OTHER SERVICES

UN PROJET DE BANQUE MONDIALE/PNUD D'ASSISTANCE TECHNIQUE AU MINISTERE DU PLAN ET DES PME DEBUTERA EN 1989. LES SOCIETES CANADIENNES ONT DES CHANCES. ELLES SE RAPPROCHERONT AINSI DU SECTEUR PRIVE GABONAIS CONSIDERE COMME L'AVENIR DU GABON.

5. FOREST PRODUCTS,EQUIP,SERVICES

POUR LA 1ER FOIS,UNE SOCIETE CANADIENNE BIEN CONNUE AU GABON TRAVAILLE DANS LE SECTEUR FORET AVEC UN SOUTIEN MCPP ET L'ACDI. LE GABON VEUT UNE AIDE CANADIENNE DANS LE SECTEUR FORESTIER COMME AU ZAIRE ET AU CAMEROUN. LA MISSION SECTORIELLE"FORETS"DE LA BM COMPORTAIT UN EXPERT CANADIEN.

6. MULTIPLE SECTORS

CE DERNIER SECTEUR OFFRIRA DES POSSIBILITES A LA CONDITION QUE LE FINANCEMENT DE CES EXPORTATIONS SE FASSE PAR LE BIAIS D'UNE LIGNE DE CREDIT/ACDI ACCORDEE SOUS FORME DE DONS, AVEC CONSTITUTION D'UN FONDS DE CONTREPARTIE.

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

1. OTHER SERVICES

2. INDUSTRIAL MACHIN,PLANTS,SERV.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LIBREVILLE

Market: GABON

Sector : POWER & ENERGY EQUIP. & SERV.

Sub-Sector: CONTROL SYSTEMS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	0.00 \$M	0.00 \$M	0.00 \$M	12.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.00 \$M	9.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	75.00 %

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

Major Competing Countries Market Share

FRANCE 0.00 %

Products/services for which there are good market prospects:

1. MATERIEL POUR ELECTRIFICATION
2. MATERIEL POUR ADDUCTION D'EAU
3. EQUIP. POUR MICRO-CENTRALES HYDROELECTRIQUES

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

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LIBREVILLE

Market: GABON

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

Activity: REUNIONS PERIODIQUES AVEC LE CONS.TECH CDN AU MIN ENERGIE
Expected Results: IDENTIFIER LES OCCASIONS EN TEMPS OPPORTUN

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LIBREVILLE

Market: GABON

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	0.00 \$M	0.00 \$M	0.00 \$M	150.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	6.00 \$M	15.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	10.00 %

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

Major Competing Countries

Market Share

FRANCE
ITALY

50.00 %
20.00 %

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

Products/services for which there are good market prospects:

1. SERV.POUR CONSULT.POUR SURVEILLANTS DES TRAVAUX
2. NIVELEUSES

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- CIDA programs
- Competitive Canadian financing

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LIBREVILLE

Market: GABON

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

- Activity: CONFIRMER L'INTERET DE MIN. DES TRANP. DU GABON POUR EQUIP CON
- Activity: VERIFIER LA DISPONIBILITE D'UN FINANCEMENT SEE/ACDI
- Activity: CONCERTATION AVEC LA B. MONDIALE & CONSULTANT CON PRESENTI

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

PROJET ENTRETIEN ROUTIER

Approximate Value: 65 M\$
Financing Source : OTHER
Contact : J. NADEAU, LBRVE

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LIBREVILLE

Market: GABON

Sector : OIL & GAS EQUIPMENT, SERVICES

Sub-Sector: MACHINERY AND EQUIPMENT

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	0.00 \$M	0.00 \$M	0.00 \$M	120.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	1.20 \$M	40.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	33.00 %

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

Major Competing Countries Market Share

FRANCE	0.00 %
UNITED STATES OF AMERICA	0.00 %

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

Products/services for which there are good market prospects:

1. ETUDES INGENIERIE
2. CONSTRUCTION PIPELINE

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LIBREVILLE

Market: GABON

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

Activity: SOUMISSION DES RAPPORTS D'ETUDES MCPP, BASSIN SEDIM, PIPELINE
Expected Results: SOUTENIR L'INTERET DU GABON POUR UNE INTERVENTION CANADIENNE

Activity: RENCONTRE A LA DIRECTION GENERALE DES HYDROCARBURES
Expected Results: OBTENTION D'UNE LETTRE D'INTENTION

Activity: RENCONTRE A LA PRESIDENCE
Expected Results: OBTENIR UN ACCORD DE PRINCIPE

Activity: TERMINER LA FORMATION DES STAGIAIRES DU GABON AUX HEC
Expected Results: RAFFERMIR NOS APPUIS A LA DGH

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

Activity: EXPOSITION INTERCAN (EDMONTON) JUIN 1989
Expected Results: EXPOSER ACHETEURS GABONAIS A L'EQUIPEMENT PETROLIER DU CANADA

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

Activity: ELABORATION DU CODE PETROLIER (MCPP/ACDI)
Expected Results: CONSOLIDER LA PLACE DU CANADA DANS LE SECTEUR

Activity: APPEL D'OFFRES POUR LA SYNTHESE DU BASSIN SEDIMENTAIRE

Activity: POURSUITE DES INITIATIVES SUR LE PIPELINE
Expected Results: SCENARIO DE FINANCEMENT PRECISE

Post : LIBREVILLE

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Post/Contact</u>
89/09/00	MISSION OIL/GAS MINING SECTOR (LIBREVILLE) MISSION IN, TO INDUSTRY	OIL & GAS EQUIPMENT,SERVICES
00/00/00	URBAN AND RAIL SYSTEMS MISS -ION FROM GABON MISSION IN, TO INDUSTRY	TRANSPORT SYS,EQUIP,COMP,SERV.

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: NAIROBI

Country: KENYA

WHILE A BALANCE OF PAYMENTS DEFICIT SITUATION WILL CONTINUE, THERE IS SOME RECOVERY IN TEA AND COFFEE PRICES AND DECLINE IN OIL PRICES. SOME INCREASE IN EXPORTS OF MANUFACTURED GOODS AND HORTICULTURAL PRODUCTS AS WELL AS IN TOURIST REVENUE MAY BE OFFSET BY CONTINUED DECLINE IN VALUE OF KENYAN SHILLING. FOREIGN EXCHANGE SHORTAGE CONTINUES WHICH ALONG WITH INCREASED SPENDING BY GOVERNMENT RESTRICTS ACCESS TO FUNDS BY PRIVATE SECTOR FOR IMPORTATION AND INVESTMENT. NEW INCENTIVES FOR INVESTMENT AND EXPORT SUCH AS MANUFACTURING UNDER BOND MAY OPEN NEW OPPORTUNITIES TO CANADIANS.

PLACEMENT BY CIDA OF DEVELOPMENT LINE OF CREDIT IN 1989/90 UNLIKELY. HOWEVER, EVENTUAL FACILITY WOULD BE WELL-RECEIVED BY PRIVATE SECTOR IMPORTERS FROM WHOM WE CONTINUE TO RECEIVE ENQUIRIES FOR IMPORTATION OF CANADIAN PRODUCTS NEEDING FOREIGN EXCHANGE SUPPORT. EDC IS INVESTIGATING PLACING LINES OF CREDIT WITH COMMERCIAL BANKS IN KENYA. EFFORTS TO EXPAND CANADIAN EXPOSURE WILL INCLUDE CONTINUATION OF SECTORAL ADVERTISEMENTS AND ARTICLES IN LEADING KENYAN PUBLICATIONS, COMMENCED IN 1988 AND OF INVESTIGATION WITH LOCAL ENTREPRENEURS AND FINANCIAL ORGANIZATIONS, OF INITIATIVES SUCH AS MISSIONS TO CANADA PAID FOR BY THE INDIVIDUALS AND ORGANIZED BY GAT, FOR PURPOSE OF INCREASING BILATERAL RELATIONS BETWEEN PRIVATE SECTORS.

TRANSPORTATION, POWER AND ENERGY, OIL AND GAS, COMMUNICATIONS, DEFENCE AND AGRICULTURE, (INCLUDING CONSULTANCY AND MANAGEMENT SERVICES) WILL BE OUR PRIORITY SECTORS FOR KENYA. WHILE THESE PRIMARILY REPRESENT OPPORTUNITIES FOR SALES TO THE KENYAN GOVERNMENT THROUGH WORLD BANK, AFDB, AND EDC FINANCING (OFTEN WITH A CONCESSIONAL ELEMENT), WE WILL ALSO BE SEEKING OPPORTUNITIES THROUGH THE PRIVATE SECTOR.

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: NAIROBI

Country: UGANDA

ALTHOUGH MEASURES TAKEN BY GOU UNDER IMF/W.B. PROGRAM FOR ECONOMIC REHABILITATION ARE STILL RELATIVELY ON TARGET, DONORS' PLEDGES ARE NOT BEING REMITTED AS SCHEDULED. CONSEQUENTLY, DESPITE RESTRAINT IN GOV'T SPENDING (EXCEPT MILITARY), AND INCREASED ACTIVITY IN PRIVATE TRADING SECTOR, THERE HAVE BEEN SIGNS THAT SEVERE REVENUE SHORTFALL THREATENS GOU ABILITY TO MEET EXISTING AND NEW COMMITMENTS TO IMF/W.B. OR ITS OWN URGENT NEEDS SUCH AS FOR FUEL, AND MILITARY EQUIPMENT REQUIRED TO ESTABLISH FULL POLITICAL CONTROL IN UGANDA. ADDITIONAL DONOR COMMITMENTS OF \$550 MILLION FOR 1989 PLEDGED AT OCTOBER/88 PARIS MEETING, AND ACCOMPANYING WORLD BANK FORECAST OF OVER 5%/YEAR GROWTH IN MEDIUM TERM SHOULD HELP EASE SEVERE DEFICIT AND URGENT FOREIGN EXCHANGE NEEDS. BRIGHT SPOT MAY BE BUMPER COFFEE CROP EXPECTED THIS YEAR. GOU HOPES TO BARTER LARGE SURPLUS IN EXCESS OF UGANDA'S QUOTA WITHOUT FURTHER DEPRESSING COFFEE PRICES.

PRESIDENT CONSIDERS TRANSPORTATION AND AGRICULTURE (EXAMPLE TRACTORS) AMONG UGANDA'S HIGHEST PRIORITIES. WHILE POST ALSO IDENTIFIES POWER AND ENERGY (E.G. WORLD BANK POWER III PROJECT) AND TELECOMMUNICATIONS AS ACTIVE SECTORS AND WILL CAREFULLY MONITOR DEVELOPMENTS, ONLY TRANSPORTATION WARRANTS INCLUSION IN SECTION 5 AND COMPLETION OF SECTION 7. MAIN OPPORTUNITIES REMAIN THROUGH MULTILATERALLY-FINANCED PROGRAMS IN VARIOUS SECTORS INCLUDING TRANSPORTATION.

RPTBI

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: NAIROBI

Country: TANZANIA

SPURRED BY IMF - STIMULATED ECONOMIC RECOVERY PROGRAMME COMMENCED IN 1986 TANZANIA HAS MADE PROGRESS. AT TIME OF PREPARATION OF THIS REPORT DISSENT BY GOT OVER QUANTUM OF FURTHER DEVALUATION (IMF WANTED DEVALUATION FROM 98 TSH/DOLLAR TO 150 TSH/DOLLAR) WAS RESOLVED AND NEW AGREEMENT REACHED WITH IMF, INCLUDING US\$63 MILLION SAF, THAT SHOULD RELEASE SEVERAL HUNDRED \$ MILLION OF FROZEN WESTERN DONOR AID.

GOT TRADE LIBERALIZATION POLICY COMMENCED IN 1984 HAS LED TO INCREASING QUANTITIES AND WIDER RANGE OF GOODS IMPORTED BY LOCAL BUSINESSMEN HAVING FOREIGN EXCHANGE. ALSO PROMISING ARE RECENT FORMATION OF A NATIONAL CHAMBER OF COMMERCE, AND PLANS TO DRAFT AN INVESTMENT CODE.

WHILE AVENUES SHOULD SLOWLY DEVELOP FOR EXPORTERS TO SELL TO A GRADUALLY RE-EMERGING PRIVATE SECTOR, AND TO INPUT GOODS AND SERVICES FOR TANZANIA'S INDUSTRIAL DEVELOPMENT, COMMERCIAL OPPORTUNITIES FOR CANADA FOR SOME TIME WILL REMAIN FOCUSSED ON WORLD BANK AND OTHER MULTILATERALLY FINANCED PROGRAMMES, PRIMARILY FOR REHABILITATION AND MAINTENANCE OF INFRASTRUCTURE, AGRICULTURE AND INDUSTRY.

OUR PRIORITY EXPORT SECTORS FOR 1988/89 REMAIN OIL & GAS, TRANSPORTATION, POWER AND ENERGY. RECENT FLURRY OF ACTIVITY BY SEVERAL CDN COS AND OTHERS IN MINING SECTOR, PARTICULARLY GOLD, SIGNALS LIKELY SIGNIFICANT NEW CDN INVESTMENT IN TANZANIA. HOWEVER IN ABSENCE OF FIRMER INDICATIONS THAT THIS WILL OPEN UP SUBSTANTIAL EXPORT POTENTIAL, THIS SECTOR HAS NOT BEEN PRIORIZED UNDER SECTIONS 5-1 AND 7.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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. TRANSPORT SYS,EQUIP,COMP,SERV.
MULTILATERAL FINANCING (WB & AFD) IS EXPECTED TO BE AVAILABLE FOR RAILWAY, PORTS, AIRPORTS (BAGGAGE HANDLING & OTHER) & URBAN TRANSIT DEVELOPMENT. KENYA SEEKS DIVERSIFICATION OF SOURCES. THIS COULD MEAN MORE OPPORTUNITIES FOR CANADIAN GOODS AND SERVICES, WHICH ARE HIGHLY REGARDED.
2. POWER & ENERGY EQUIP. & SERV.
CANADA ACTIVE THROUGH CIDA AND PCIAC. PROVEN EXPERTISE IN BOTH GOODS & SERVICES SHOULD HELP CHANCES FOR PARTICIPATION IN PLANNED & POSSIBLE PROJECTS, MAINLY WITH MULTILATERAL FINANCING, FOR HYDROELECTRIC GENERATING PLANTS, GEOTHERMAL DEVELOPMENT, POWERCABLE & OTHER POWER TRANSMISSION SUPPLIES. ALSO SEE SECTION 7 RE; WEST KENYA CEMENT PLANT
3. OIL & GAS EQUIPMENT,SERVICES
EXPLORATION BY AMOC, TOTAL & OTHER SHOW PROMISE FOR OIL RESERVES IN NORTH OF COUNTRY. PCIAC'S PAST ACTIVITIES & CURRENT ADVISOR TO NAT. OIL CORP., PLUS BAWDEN DRILLING CONTRACTS WITH MULTINATIONALS FORM BASIS FOR ADDT. CDN INPUTS INTO DOWNSTREAM DEVELOPMENTS - LAVALIN ACTIVELY PURSUING WEST KENYA OIL PIPELINE & OTHER PROJECTS.
4. ADVANCED TECH. PROD. & SERV
CDN COMPANIES CONTINUE PURSUIT OF MAJOR CONTRACTS WITH TELECOMMUNICATIONS AUTHORITY FOR RURAL TELEPHONE AND FOR TELEX SWITCHING EQUIP. ANTICIPATED DEVELOPMENT PLANS BEING ELABORATED (POSSIBLY W.B.-FINANCED) SHOULD BE OF STRONG INTEREST TO CANADIAN CONSULTANTS & EQUIPMENT SUPPLIERS.
5. DEFENCE PROGRAMS,PRODUCTS,SERV
KENYAN DEFENCE PERSONNEL ARE FAMILIAR AND IMPRESSED WITH CANADIAN EQUIPMENT INCLUDING AIRCRAFT WHICH GIVES CANADA OPPORTUNITIES FOR PARTICIPATION IN PROCUREMENT PROGRAM.
6. AGRI & FOOD PRODUCTS & SERVICE
POSSIBILITIES FOR CANADA EXIST FOR SUPPLY OF LIVESTOCK WITH CANADIAN EQUIPMENT INCLUDING MACHINERY AND EQUIPMENT SINCE IMPROVEMENT IN AGRICULTURAL PRODUCTION IS A HIGH PRIORITY OBJECTIVE OF GOK.

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

- | | |
|-----------------------------------|-----------------------------------|
| 1. DEFENCE PROGRAMS,PRODUCTS,SERV | 4. INDUSTRIAL MACHIN,PLANTS,SERV. |
| 2. POWER & ENERGY EQUIP. & SERV. | |
| 3. TRANSPORT SYS,EQUIP,COMP,SERV. | |

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RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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. TRANSPORT SYS,EQUIP,COMP,SERV.

TRANSPORTATION IS HIGH PRIORITY SECTOR FOR GOV. WORLD BANK SEEMS PREPARED TO FINANCE SIGNIFICANT PORTIONS OF ACTIVITIES. ALSO POSSIBLE AFDB PARTICIPATION. CDA'S STRONG REPUTATION IN SECTOR IN REGION BODES WELL FOR INITIAL CONTRACTS IN UGANDA, UNDER IFI FINANCING.

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

1. AGRI & FOOD PRODUCTS & SERVICE
2. INDUSTRIAL MACHIN,PLANTS,SERV.
3. CHEM PROD & PETROCHEM,EQP,SERV

RPT82

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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. OIL & GAS EQUIPMENT, SERVICES
OIL AND GAS EXPLORATION AND DEVELOPMENT CONTINUES TO A MAJOR PRIORITY OF TANZANIAN GOVERNMENT AND SHOULD EVENTUALLY PRESENT GOOD OPPORTUNITIES FOR CANADIAN SUPPLIERS OF GOODS AND SERVICES.
2. TRANSPORT SYS, EQUIP, COMP, SERV.
REHABILITATION & EXPANSION OF INFRASTRUCTURE, MNGMT IMPROVEMENT (RAILWAY, ROADS, PORTS, AIRPORTS, AIRLINE) ARE PRIORITY AGENDA ITEMS OF GOT. AIDED BY REPUTATION BUILT UP IN SECTRO THROUGH CIDA ASSISTANCE CDN'S SHOULD BE WELL-PLACED TO WIN CONSULTANCY & EQUIP. CONTRACTS. CPCS & ND LEA RECENTLY WON W.B. SERVICES CONTRACTS FOR RAILWAY & ROAD WORK.
3. POWER & ENERGY EQUIP. & SERV.
REHABILITATION OF POWER INFRASTRUCTURE AND ADDING TO IT REMAINS A HIGH GOT PRIORITY. THROUGH CIDA FUNDING CD'N FIRMS HAVE GIVEN CDA A FAVOURABLE EXPOSURE IN TANZANIA AND A GOOD CHANCE OF PLACING CONSULTANCY SERVICES AND EQUIPMENT THERE.

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

1. INDUSTRIAL MACHIN, PLANTS, SERV.
2. TRANSPORT SYS, EQUIP, COMP, SERV.
3. AGRI & FOOD PRODUCTS & SERVICE
4. GRAINS AND OILSEEDS

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: NAIROBI

Market: KENYA

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: ANIMAL, POULTRY BREEDING STOCK

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	55.00 \$M	60.00 \$M	90.00 \$M	100.00 \$M
Canadian Exports	0.15 \$M	1.00 \$M	1.50 \$M	3.00 \$M
Canadian Share of Market	0.27 %	1.70 %	1.70 %	3.00 %

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

Major Competing Countries	Market Share
UNITED KINGDOM	20.00 %
GERMANY WEST	18.00 %
ISRAEL	12.00 %
SWEDEN	10.00 %
JAPAN	10.00 %
UNITED STATES OF AMERICA	10.00 %

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

Products/services for which there are good market prospects:

1. BOVINE DAIRY BREEDING STOCK SEMEN & EMBRYOS
2. AGRIC. MACHINERY & EQUIPMENT
3. CONSULTING AND OTHER SERVICES
4. VETERINARY PHARMACEUTICALS

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

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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: POST INTRO CDN SUPPLIERS OF BOVINE DAIRY SEMEN & EMBRYO
Expected Results: WE ARE OPTIMISTIC SALES OF AT LEAST \$1 M WILL RESULT IN 89/90 AND FOLLOW-ON SALES IN ENSUING YEARS.

Activity: CDN FIRMS, SEMEX, DISCUSS W/KENYAN PRI SECTOR EXTAB A.I.
Expected Results: IF NEGDTIATIONS SUCCESSFUL, SEMEX WILL PROVIDE TECH ASSIST & TRAINING, SEMEN & LIVE BREEDING STUCK & VET PRODUCTS.

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

Activity: POST WILL EXPLORE AD HOC VISITS, TO OBTAIN ENTRY INFO AGRIC
Expected Results: INITIAL SMALL SALES OF MACHINERY AND EQUIPMENT

Activity: JAPAN/OECF RECENTLY EXTENDED UNTIED SOFT LOAN, ADMIN BY WORL
Expected Results: SOME CDN EXPORT OF FARM INPUTS.

Activity: POST WORKING ON ARRANGE TO HAVE VIDEO CASSETTE PRESENTATION
Expected Results: ENHANCE IMAGE & KNOWLEDGE IN KENYA OF QUALITY OF CDN DAIRY INDUSTRY.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: NAIRDHI

Market: KENYA

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: AEROSPACE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1000.00 \$M	500.00 \$M	500.00 \$M	800.00 \$M
Canadian Exports	47.00 \$M	4.00 \$M	4.00 \$M	50.00 \$M
Canadian Share of Market	4.70 %	0.80 %	0.80 %	6.25 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	40.00 %
UNITED KINGDOM	15.00 %
EUROPEAN COMMON MARKET C	15.00 %

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

Products/services for which there are good market prospects:

1. TRANSPORT AIRCRAFT
2. AIRCRAFT PARTS

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: BOEING/DE HAVILLAND CDA NEGOT W/MOD COULD RUN INTO 1989/90
Expected Results: CONTRACT FOR SUPPLY OF 3 DASH.8 VALUED AT APPROX. US\$ 40 MILLION.

Activity: ASSIST SALES PROMOTION BY CDN COS OF REPLAC PARTS & ASSEMBL
Expected Results: CONTRACTS TOTALLING C\$ 4 MILLION.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: NAIROBI

Market: KENYA

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: TELECOM, DATACOM, SAT, SPACECOM

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	55.00 \$M	60.00 \$M	60.00 \$M	150.00 \$M
Canadian Exports	0.18 \$M	0.02 \$M	0.02 \$M	30.00 \$M
Canadian Share of Market	0.33 %	0.03 %	0.03 %	20.00 %

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

Major Competing Countries	Market Share
ITALY	21.00 %
JAPAN	18.00 %
FRANCE	15.00 %
UNITED KINGDOM	12.00 %
GERMANY WEST	10.00 %
SWEDEN	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. RURAL TELECOMM. EQUIPMENT
2. AUTO TELEX SWITCHING EQUIPMENT
3. MESSAGE SWITCHING COMPUTER EQUIPMENT
4. COPPER CABLE
5. DIGITAL SWITCHING EQUIPMENT

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

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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: CONTINUE ASSISTING CDN MARCONI TO OBTAIN AUTO TELEX SWITCHIN
Expected Results: CONTRACTS WORTH C\$7.4 MILLION (C\$5.6 MILLION PLUS C\$1.8 MILLION ADD-ON TO FOLLOW).

Activity: CONTINUE TO ASSIST SK TELECOM TO OBTAIN CONTRACT W/KPTC
Expected Results: IF SUCCESSFUL, SALE OF 60 SYSTEMS VALUED AT OVER US\$20 MILLION.

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

Activity: FOLLOW ELABORATION OF PLANS FOR FUTURE ACQUISITIONS KPTC
Expected Results: SALES OF CDN GOODS & SERVICES UNPREDICTABLE UNTIL DETAILS OF PROPOSED ACQUISITIONS & FINANCING DETERMINED.

Activity: BICC OF U.K. HAS CONTRACT FOR COPPER TELEPHONE CABLE TO KPTC
Expected Results: CONTRACTS TOTALLING SEVERAL MILLION DOLLARS POSSIBLE IN 1989/90 WITH FOLLOW ON SALES.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NAIROBI

Market: KENYA

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

IBRD-FIN KPTC BID CALLED FALL/ Approximate Value: 4 M\$
88 FOR MESSAGE SWITCHING COMPU Financing Source : IBRD - World Bank
Contact : CDN HIGH COMMISSION, NAIROBI.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: NAIROBI

Market: KENYA

Sector : POWER & ENERGY EQUIP. & SERV.

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	57.00 \$M	65.00 \$M	60.00 \$M	70.00 \$M
Canadian Exports	1.10 \$M	0.90 \$M	4.00 \$M	2.00 \$M
Canadian Share of Market	1.90 %	1.40 %	6.70 %	2.90 %

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

Major Competing Countries

Market Share

JAPAN	20.00 %
UNITED KINGDOM	15.00 %
FRANCE	12.00 %
SWEDEN	10.00 %
ITALY	8.00 %
YUGOSLAVIA	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. HYDROELECTRIC AND GEOTHERMAL PLANT EQUIPMENT
2. CONSULTING SERVICES
3. EQUIPMENT & MATERIALS FOR PROPOSED W.KENYA CEMENT

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
- willingness of exporters to invest/joint venture in territory

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising

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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: LAVALIN AWARDED CPPF FOR FEASIB STUDY FOR WEST KENYA CEMENT
Expected Results: IF STUDIES POSITIVE & GOK PROCEEDS, CDN CONSULTANTS & EQUIP SUPPLIERS WILL BE IN GOOD POS FOR CONTR WORTH OVER \$C 50 M

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

Activity: NEW GEOTHERMAL EXPLORATORY ACTIV ANTIC. BRITISH AWARDED STUD
Expected Results: DEPENDING ON SOURCES OF FINANCING, OPPORTUNITIES FOR BIDS BY CDN CONSULTANTS, CONTRACTORS, SUPPLIERS.

Activity: SONDU HYDROELECTRIC PROJ RUMORED TO BE TIED-UP BY JAPANESE
Expected Results: CHANCES DO NOT APPEAR STRONG AT PRESENT SO RESULTS CANNOT BE PREDICTED AT THIS POINT.

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: NAIROBI

Market: KENYA

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	160.00 \$M	165.00 \$M	190.00 \$M	200.00 \$M
Canadian Exports	1.00 \$M	2.00 \$M	4.00 \$M	7.00 \$M
Canadian Share of Market	0.60 %	1.20 %	2.10 %	3.50 %

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

Major Competing Countries

Market Share

UNITED KINGDOM	25.00 %
JAPAN	20.00 %
FRANCE	15.00 %
UNITED STATES OF AMERICA	10.00 %
ITALY	5.00 %
NETHERLANDS	3.00 %

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

Products/services for which there are good market prospects:

1. CONSULTING AND MANAGEMENT SERVICES
2. RAILWAY EQUIPMENT (EXCLUDING LOCOMOTIVES)
3. URBAN TRANSIT EQUIPMENT
4. AIRPORT BAGGAGE HANDLING AND NAVAID EQUIPMENT
5. LIGHT AIRCRAFT (MAINLY USED)
6. PORT HANDLING EQUIPMENT
7. AIRCRAFT PARTS AND 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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NAIROBI

Market: KENYA

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- 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: GOV STILL WORKING ON MEDIUM & LONG TERM SOLUTIONS TO URBAN
 Expected Results: POSSIBLE SALES OF CANADIAN SERVICES AND EQUIPMENT. AMOUNTS NOT PREDICTABLE AT THIS STAGE.

Activity: "NEEDS ASSESS" OF KENYA AIRWAYS IN86/87 BY CDN CONSULTANT
 Expected Results: PLACEMENT OF CANADIAN CONSULTING SERVICES CONCEIVABLE IN PERIOD UNDER REVIEW.

Activity: PORTS AUTH PLANS CONSTRUCT CONT FREIGHT STATION ADJ MOMBASA
 Expected Results: IMPOSSIBLE TO KNOW WHETHER OR WHAT OPPORTUNITIES FOR CDN'S. CAUTIONS OPTIMISM MERITED.

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

Activity: INTER AIRPORT AT MOMBASA PLANS INSTALL NEW BAGGAGE HANDLING
 Expected Results: CONTRACT FOR THE TWO SYSTEMS TOTALLING ABOUT \$ 3M. MAY LEAD TO SYSTEMS IN SMALLER REGIONAL AIRPORTS.

Activity: KENYA RAILWAYS PLANS REHAB NAKURU TO KISUMU LINE W/W.B.,
 Expected Results: FEASIBILITY STUDY BY TECSULT UNDER CPPF - \$500,000. FOLLOW ON SUPPLY OF EQUIP AND RAIL FOR RELAYING LINE.

Activity: FURTHER SALES OF USED LIGHT AIRCRAFT AFTER INIT. SALES 2 USE

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NAIROBI

Market: KENYA

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

NAVIGATION AIDS (DME & VOR EQU Approximate Value: 10 Ms
IP) FOR AIRPORTS FOR CIVIL AVI Financing Source : EDC - Export Dev Corporation
Contact : NAVCOM GROUP/B. HUGHES, CHAIR
PO BOX 30782, NAIROBI TLX:25723

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: NAIROBI

Market: KENYA

Sector : OIL & GAS EQUIPMENT, SERVICES

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	400.00 \$M	410.00 \$M	425.00 \$M	500.00 \$M
Canadian Exports	20.00 \$M	3.00 \$M	3.00 \$M	28.00 \$M
Canadian Share of Market	5.00 %	0.73 %	0.71 %	5.60 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	20.00 %
UNITED KINGDOM	20.00 %
FRANCE	20.00 %
JAPAN	0.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. EQUIPMENT AND SERVICES FOR PIPELINE
2. HYDROCARBON DRILLING EXPLOR AEROMAGNETIC & SEISMIC
3. WILDFIELD EQUIPMENT AND SERVICES

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- 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:

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

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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: CAN (LAVALIN IN CONSORTIUM W/SOGEA OF FRANCE) HAS BID IN COM
Expected Results: CHANCES FOR LAVALIN SERVICES & CDN EQUIP SUPPL CONTRACTS
WORTH UP TO C\$ 72 IN OVER 3 YR PERIOD W/INITIAL BUS IN 88/89

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

Activity: EXPLORATION ALREADY CARRIED OUT W/PROMISING RESULTS IN BLOCK
Expected Results: SEVERAL CONT W/MULTI OIL CO (AMOCO, TOTAL) FOR SUPPLY OF
DRILLING, AEROMAGNETIC & SEISMIC SURVEYS.

Activity: POST WILL MONITOR RESULTS OF HYDROCARBON EXPLO PROGRAM
Expected Results: CDA CAN ANTICIPATE BEING EVENTUAL SOURCE OF SOME OILFIELD
EQUIPMENT AND SERVICES.

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: NAIROBI

Market: UGANDA

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	45.00 \$M	60.00 \$M	60.00 \$M	100.00 \$M
Canadian Exports	0.00 \$M	0.50 \$M	5.00 \$M	3.00 \$M
Canadian Share of Market	0.00 %	0.80 %	0.80 %	3.00 %

Major Competing Countries

Market Share

GERMANY WEST	30.00 %
ITALY	15.00 %
FRANCE	10.00 %
EUROPEAN COMMON MARKET C	15.00 %
PEOPLE'S REP OF CHINA	10.00 %
ZIMBABWE	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. CONSULTING SERVICES
2. RAILWAY EQUIPMENT/MATERIALS
3. AIRPORT EQUIPMENT
4. AIRCRAFT

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:

- 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: LAVALIN PRESENTED TO GOU FINAL CPPF STUDY ON REHAB. OF ENTEB
Expected Results: EVENTUAL ADDITIONAL CDN CONSULTANCY CONTRACTS, AND EQUIPMENT CONTRACTS AT IMPLEMENTATION STAGES.

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

Activity: W.B.(IDA) EXPECTS TO FORMALIZE US\$7 M PROJ FOR REHAB OF KAM
Expected Results: BIDS BY CDN CONSULTANTS AND EQUIPMENT SUPPLIERS.

Activity: GOU REQUESTED CDN SOURCES OF USED RAIL & LOCOMOT IMPLING PAY
Expected Results: DETERMINE GOU PRIORIZATION AND BASIS OF PAYMENT, THEN COS TO ENTER INTO NEGOTIATIONS WITH GOU.

Activity: LAVALIN APPLIED FOR CPPF ASSIS FOR STUDY REORG, MNGMT UGANDA
Expected results: DOWNSTREAM CONSULTANCY CONTRACTS. IDENTIFY POSSIBILITY AIRCRAFT SALE.

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: NAIROBI

Market: TANZANIA

Sector : POWER & ENERGY EQUIP. & SERV.

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	20.00 \$M	25.00 \$M	30.00 \$M	40.00 \$M
Canadian Exports	0.50 \$M	0.50 \$M	1.00 \$M	2.00 \$M
Canadian Share of Market	2.50 %	2.00 %	3.30 %	5.00 %

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

Major Competing Countries

Market Share

NETHERLANDS	20.00 %
JAPAN	15.00 %
ITALY	10.00 %
GERMANY WEST	10.00 %
UNITED KINGDOM	10.00 %
PEOPLE'S REP OF CHINA	10.00 %

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. POWER PLANT EQUIPMENT
3. 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

Factors for Canadian exports not reaching market potential:

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

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RPTCL

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: FOR AFDB FINANCED PANGANI FALLS HYDROELECTRIC POWER DEV STUD
Expected Results: REMOTE CHANCE ACRES MIGHT WIN AWARD IN WHICH CASE OPPORT
BETTER FOR CDN SUPPLIERS WHEN IMPLEMENTED.

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

Activity: SUPPORT MONENCO'S EFFORTS TO BE COMMISSIONED-ENERGY MINISTRY
Expected Results: STUDY WILL ENHANCE CANADAS IMAGE IN SECTOR. BUSINESS FOR
CDN SUPPLIERS IF EVENTUALLY IMPLEMENTED.

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NAIROBI

Market: TANZANIA

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

MASIGIRA HYDROELEC POWER PROJ Approximate Value: 0 M\$
(RUHURU RIVER BASIN) NEXT/LINE Financing Source : IDA - World Bank
Contact : CHC IN NAIROBI OR DAR ES
SALAAM

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: NAIROBI

Market: TANZANIA

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	110.00 \$M	100.00 \$M	120.00 \$M	130.00 \$M
Canadian Exports	5.00 \$M	5.00 \$M	8.00 \$M	10.00 \$M
Canadian Share of Market	4.50 %	5.00 %	6.60 %	7.70 %

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

Major Competing Countries Market Share

EUROPEAN COMMON MARKET C	45.00 %
NETHERLANDS	15.00 %
UNITED STATES OF AMERICA	15.00 %
PEOPLE'S REP OF CHINA	10.00 %

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

Products/services for which there are good market prospects:

1. CONSULTING AND MANAGEMENT SERVICES
2. RAILWAY EQUIPMENT
3. HIGHWAY MAINTENANCE EQUIPMENT
4. AIRPORT EQUIPMENT

Factors contributing to current successful Canadian exports:

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

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: TANZANIA

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

Activity: CPCS RECENTLY AWARDED LONG-TERM W.B. STUDY ON MNGMT & REHAB
Expected Results: SEVERAL OPPORTUNITIES FOR CDN COS FOR CONSULTANCY WORK, POSSIBLY EQUIPMENT.

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

Activity: 6TH HGWY PROJ, CONCENTRATING ON RURAL & TRUNK RD REHAB & MTC
Expected Results: SHORTLISTING OF SEVERAL CDN COS.

Activity: SEEK MORE DETAILS OF GOT PLANS TO REHABILITATE BUKOBA, MBEYA
Expected Results: DEFINE SCOPE FOR CDN PARTICIPATION.

Activity: IRISH REPORTED TO BE COMPLETING STUDY RE: MNGMT & INVST REQ
Expected Results: DEPENDING ON RECOMMENDATIONS AND IMPLEMENTATION PROCESS THERE MAY BE SCOPE FOR CDN INVOLVEMENT.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: NAIRUBI

Market: TANZANIA

Sector : OIL & GAS EQUIPMENT, SERVICES

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	120.00 \$M	150.00 \$M	180.00 \$M	250.00 \$M
Canadian Exports	2.00 \$M	2.00 \$M	3.00 \$M	10.00 \$M
Canadian Share of Market	1.70 %	1.30 %	1.70 %	4.00 %

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

Major Competing Countries Market Share

ITALY	20.00 %
UNITED STATES OF AMERICA	15.00 %
FRANCE	15.00 %
NETHERLANDS	10.00 %
NORWAY	5.00 %
UNITED KINGDOM	5.00 %

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

Products/services for which there are good market prospects:

1. DRILLING EXPLORATION
2. CONSULTANCY SERVICES
3. EQUIPMENT

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

Factors for Canadian exports not reaching market potential:

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

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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: PCIAC-SPONSORED SEISMIC HYDROCARBON EXPLORATION ACTIVITIES
Expected Results: SEISMIC AND DRILLING WORK FOR CDN COS, RESULTANT EXPLOITABLE DISCOVERIES WITH POTENTIAL SALE OF CDN SERVICES & EQUIPMENT.

Activity: HAKDY BBT STARTING CPPF STUDY FOR TPDC ON FEASIBILITY GAS PI
Expected Results: IF PROJ PROVED FEASIBLE & FINANCING FOUND, IMPLEMENTATION COULD PROVIDE LUCRATIVE CONTRACTS FOR SALE OF CDN SERVICES

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

Activity: WORLD BAN (IDA) HAS RECD BIDS FROM CDN COS FOR 2 PROJECTS
Expected Results: IF CDN FIRMS WIN COMPETITIONS FURTHER CONTRACTS COULD RESULT FOR THEM AND OTHER CDNS.

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NAIROBI

Market: TANZANIA

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

UNDER W.B.(IDA) FUNDING A USA Approximate Value: 85 M\$
CO STUDY IDENTIFIED BOTTLENECK Financing Source : IDA - World Bank
Contact : CHC'S IN NAIROBI OR DAR
ES SALAAM

Post : NAIROBI

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Post/Contact</u>
89/04/00	MINING EQUIPMENT MISSION FROM NAIROBI MISSION IN, TO INDUSTRY	MINE, METAL, MINERAL PROD & SRV
89/06/21	AG MISS. FM KENYA TO WEST. COA FARM PROGRESS SHOW MISSION IN, TO FAIR	AGRI & FOOD PRODUCTS & SERVICE A.AUBIN
89/11/00	BUYERS FROM NAIROBI, TUNIS, ALG., RABAT TO ROYAL WINTER F. MISSION IN, TO INDUSTRY	AGRI & FOOD PRODUCTS & SERVICE

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: RABAT

Country: MOROCCO

IN 1987, MOROCCO BECAME CANADA'S MOST IMPORTANT MARKET IN AFRICA, WITH EXPORT TOTALLING \$204 MILLION. IN 1988, EXPORTS TOTALLED \$278 MILLION. THIS FIGURE SHOULD INCREASE IN 1989, AS SULPHUR SHIPMENTS WILL REMAIN HIGH AND NEW EXPORT PRODUCTS WILL BE ADDED. MOST NOTABLY, COMMUNICATIONS EQUIPMENT FROM NORTHERN TELECOM WILL ADD SUBSTANTIALLY TO THE VALUE OF EXPORTS. THE FIRST DELIVERY, OF A TOTAL \$80 MILLION, WAS MADE IN OCTOBER 1988 AND SHIPMENTS WILL CONTINUE IN 1989. FURTHERMORE, CONTRACTS SIGNED IN MID-1988 (REYNOLDS CABLES, WESTINGHOUSE, SYSCO) WILL SWELL THE 1989 FIGURES.

IN ADDITION TO THE RAPID GROWTH OF EXPORTS, ADDITIONAL ACTIVITY IS GENERATED BY THE FACT THAT MOROCCAN AUTHORITIES ARE INCREASINGLY AWARE OF CANADA AS A SIGNIFICANT ECONOMIC PARTNER. ACCESSION OF PORTUGAL AND SPAIN TO THE E.C. AND DIFFICULTIES IN MAINTAINING TRADITIONAL COMMERCIAL RELATIONS IN EUROPE HAVE FORCED MOROCCANS TO LOOK ELSEWHERE. INCREASINGLY, THEY ARE AWARE THAT CANADA CAN SUPPLY NORTH AMERICAN EXPERTISE IN FRENCH. INDEED, THE ARRIVAL OF 80 BELL CANADA EMPLOYEES BY EARLY 1989 WILL SERVE TO STRENGTHEN THIS PERCEPTION IN MOROCCO. IN SHORT, CONDITIONS ARE VERY FAVOURABLE TO INCREASED COMMERCIAL ACTIVITY IN THE NEXT YEAR.

IN 1989-90, THE POST WILL ATTEMPT TO DIVERSIFY CANADIAN EXPORTS AWAY FROM THE HEAVY DEPENDANCE ON SULPHUR. SIGNIFICANT PROGRESS HAS ALREADY BEEN MADE IN THIS REGARD. MARKET INITIATIVES WILL BE TAKEN IN THE AREAS OF TELECOMMUNICATIONS (TO EXPAND ON THE RECENT SUCCESS OF B.C.I.), ENERGY (ELECTRIC), TRANSPORT (RAIL AND AIR), AGRICULTURE (LIVESTOCK), EDUCATION AND TRAINING (IFI FINANCING) AND VARIOUS CONSULTING SERVICES (WATER, ENERGY, FORESTRY). NEW SECTORS OF INTEREST WILL BE FISHERIES AND OCEAN INDUSTRIES (A PRIORITY SECTOR FOR MOROCCAN DEVELOPMENT) AND DEFENCE (SUBJECT TO DEVELOPMENTS IN THE SAHARA AND AVAILABILITY OF EXPORT PERMITS) MAJOR CUSTOMERS WILL REMAIN THE STATE COMPANIES. FINANCING REMAINS A PROBLEM IN MOROCCO, AND THE B.C.I. PROJECT HAS CONSUMED A GREAT DEAL OF AVAILABLE E.D.C. AND CIDA FUNDING. IT IS CLEAR THAT FUTURE CONTRACTS WILL DEPEND HEAVILY UPON THE AVAILABILITY OF COMPETITIVE FINANCING. (RECENT PARIS CLUB AGREEMENTS SHOULD GIVE MOROCCO ADDITIONAL FLEXIBILITY IN FINANCING IMPORTS). THE POST WILL ATTEMPT TO WORK WITH MOROCCAN INSTITUTIONS TO FIND ALTERNATIVE SOURCES OF FINANCING, INCLUDING MIDDLE EASTERN BANKS. TRADITIONAL IFI PROJECTS WILL ALSO BE FOLLOWED. IN 1987, THE MOROCCAN ECONOMY PRODUCED GENERALLY GOOD RESULTS (INFLATION RATE WAS 2.6%) ALTHOUGH THE GROWTH RATE WAS ONLY 1.5% DUE TO A DROUGHT. WITH AN EXCELLENT CROP IN 1988, COMPARABLE TO THE RECORD YEAR OF 1986, THE GROWTH RATE OF THE ECONOMY REACHED 6%. THE POLICY OF PRIVATIZATION AND LIBERALIZATION OF THE ECONOMY (PARTICULARLY IN FOREIGN TRADE) AND REESTABLISHING FUNDAMENTAL EQUILIBRIUM WILL BE MAINTAINED. THE CURRENT ACCOUNT DEFICIT WAS NEGLIGIBLE IN 1987 (IN THE ORDER OF \$ 27 MILLION) AND DISAPPEARED IN 1988. THE EXPORTS-TO-IMPORTS RATIO FOR 1988 WAS 71%, COMPARED TO 66.3% IN 1987 AND 64% IN 1986. THIS RATIO HAS IMPROVED BY 20% SINCE THE LAST OIL SHOCK. TOURISM INCOME OF MORE THAN

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: RABAT

Country: MOROCCO

\$1 BILLION AND REMITTANCES OF MOROCCAN WORKERS ABROAD WHICH REMAINED STABLE IN 1987, ARE INCREASING IN 1988 AND WILL ASSIST THE BALANCE OF PAYMENTS. FOREIGN EXCHANGE RESERVES ARE BEING ACCUMULATED AND PARIS CLUB RESCHEDULINGS IN OCTOBER 1988 SHOULD BE THE LAST. THE FOREIGN DEBT OF POLICY IS SOUND AND SHOULD HELP THE ECONOMIC SITUATION. JOB CREATION IS NOT SUFFICIENT TO MEET DEMANDS.

RPT82

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 EXPORT PROMOTION PRIORITIES

Mission: RABAT

Country: MOROCCO

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.
L'INDUSTRIE CANADIENNE EST DEJA BIEN CONNUE AVEC CONTRAT DE BELL CANADA INTL. ET SEMINAIRE TECHNIQUE EN DECEMBRE 1988. UN SECTEUR OU IL Y AURA BEAUCOUP D'INVESTISSEMENTS PUBLICS ET PRIVES, ET PAR IFI'S.
2. POWER & ENERGY EQUIP. & SERV.
SECTEUR OU L'INDUSTRIE CANADIENNE EST BIEN CONNUE ET COMPETITIVE. WESTINGHOUSE ET REYNOLDS ONT VENDU ALTERNATEURS ET CABLES, ET HYDRO-QUEBEC INTL. EST ACTIVE AVEC OFFICE NATIONAL D'ELECTRICITE IFI FONDS DISPONIBLE.
3. TRANSPORT SYS, EQUIP, COMP, SERV.
SYSCO (RAILS) ET G.M. (LOCOMOTIVES) SONT ACTIF AVEC OFFICE NATIONAL DES CHEMINS DE FER. IL EST FORTEMENT POSSIBLE QUE MDS PEUT VENDRE UNE FACILITE POUR EXAMINER DES REACTEURS DE RAM. METRO DE CASA EST AUSSI INTERESSANT.
4. FISHERIES, SEA PRODUCTS & SERV.
SECTEUR D'IMPORTANCE POUR LE MAROC, ET UN SECTEUR DE COMPETENCE CANADIENNE. POSSIBILITE D'EXISTENCE DE VENTE DE BATEAUX, EQUIPEMENT ET COMMUNICATIONS.
5. GRAINS AND OILSEEDS
UN GRAND MARCHE POUR BLE ET HUILES VEGETALES. AMBASSADE VA DETERMINER S'IL EXISTE POSSIBILITE DE VENTE CONTRE COMPETITION DES E.U. ET DE LA C.E.

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

1. MINE, METAL, MINERAL PROD & SRV
2. ADVANCED TECH. PROD. & SERV
3. TRANSPORT SYS, EQUIP, COMP, SERV.
4. GRAINS AND OILSEEDS

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: RABAT

Market: MOROCCO

Sector : FISHERIES, SEA PRODUCTS & SERV.

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	22.00 \$M	37.00 \$M	74.00 \$M	95.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.00 \$M	0.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	0.00 %

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

Major Competing Countries

Market Share

FRANCE	35.00 %
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. SERVICES DE CONSULTATION
2. EQUIPEMENT DE TRANSFORMATION DE POISSONS
3. BATEAUX DE PECHE

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

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

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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: INFORMER LES COMPAGNIES CDN DU LANCEMENT DES DIFFERENTS PROJ
Expected Results: PERMETTRE AUX SOCIETES CDN DE PRENDRE UNE PART ACTIVE DANS
LE DEVELOP. DE CE SECTEUR AU MAROC & PAR VOIE DE CONSEQUENCE

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

PROJETS ONTEGRES DE PECHE [DAKLA]	Approximate Value: 260 M\$ Financing Source : Contact : AMBASSADE
PROJET INTGRE DE PECHE [TAN TAN]	Approximate Value: 105 M\$ Financing Source : Contact : AMBASSADE

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: RABAT

Market: MOROCCO

Sector : GRAINS AND OILSEEDS

Suo-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	415.00 \$M	339.00 \$M	400.00 \$M	410.00 \$M
Canadian Exports	4.90 \$M	8.00 \$M	10.00 \$M	20.00 \$M
Canadian Share of Market	1.20 %	2.30 %	2.50 %	4.80 %

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

Major Competing Countries Market Share

UNITED STATES OF AMERICA	80.00 %
FRANCE	10.00 %
SPAIN	5.00 %
BRAZIL	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. BLE
2. HUILE VEGETALE
3. EQUIPMENTS
4. MAIS

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
- Competitive Canadian financing
- LES NOI A 1300ERNE LES
- CAS D'UNE FIRME CDNNE
- D'EQUIPMENT - A.O.I.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: KABAT

Market: MOROCCO

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Non-competitive financing
- LES AMERICAINS ET LES FRANCAIS SUB-
- VENTIONNENT LE BLE ET L'HUILE VEG.

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

Activity: CONTINUER SUIVI ET ASSISTANCE & EN PHASE FINALE DE NEGOCIAT.
Expected Results: REMPORER LE CONTRAT DE 8 MILLIONS DES SILOS DE SAFI

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 DE PRES TOUT A.O.I. EN EQUIPEMENT DE STOCKAGES
Expected Results: ASSURER LA PREQUALIFICATION DE SOCIETES CONNES ET REMPORER AU MOINS UN CONTRAT.

Activity: ENQUETE SUR LA SITUATION DE BLE, DES CEREALES ET DES OLEAGI.
Expected Results: MISE A JOUR DES POSSIBILITES EXPORTS. OBTENTION INFOS SUR FINANCEMENT CONCURRENTS

Activity: ETUDE DE MARCHE SUR LES EQUIPEMENTS RELATIFS A LA MANUTENTIO
Expected Results: PRODUCTION D'UN RAPPORT

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: RABAT

Market: MOROCCO

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: TELECOM, DATACOM, SAT, SPACECOM

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	80.00 \$M	104.00 \$M	174.00 \$M	205.00 \$M
Canadian Exports	0.20 \$M	0.20 \$M	16.00 \$M	100.00 \$M
Canadian Share of Market	0.25 %	0.19 %	9.20 %	48.80 %

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

Major Competing Countries

Market Share

FRANCE	50.00 %
SWEDEN	10.00 %
JAPAN	5.00 %
GERMANY WEST	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. LIGNES TELEPHUNIQUES
2. ASSISTANCE TECHNIQUE
3. TELEPHONIE RURALE
4. TRANSMISSION DE DONNEES
5. TELECOM MARITIME STATION MF-VHF
6. EMETTEURS TV
7. CONSULTATION-INFORMATIQUE

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
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- Competitive Canadian financing

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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
- LA CONCURRENCE FRANCAISE EST TRÈS
- IMPORTANTE ET TRÈS PRÉSENTE SUR LE

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

Activity: APPUI INTENSIF A DONNER A LA SOCIETE QUI A DEJA GAGNE
Expected Results: REMPORTE LA 2EME PARTIE DU CONTRAT.

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

Activity: NEGOCIATION POUR LA SIGNATURE D'UN ACCORD DE COOPERATION
Expected Results: SIGNATURE DE L'ACCORD

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

Activity: POURSUIVRE ASSIDUMENT TOUS LES A.O.I. LANCES PAR L'ONPT
Expected Results: OBTENIR 1 OU 2 MARCHES

Activity: APPUI A SOCIETE CANADIENNE POUR PREQUALIFICATION POUR PROJET
Expected Results: BIEN POSITIONNER SOCIETE CANADIENNE

Activity: ELABORER ET METTRE EN PLACE STRATEGIE AVEC SOCIETE CANADIENNE
Expected Results: ASSURER PRESENCE CANADIENNE AUX A.O.I. ET POSITIONNER FAVORABLEMENT FIRME CANADIENNE.

Activity: SUIVRE DE PRES LE MARCHÉ DE L'INFO. DES GRANDS SERVICES PUBLICS
Expected Results: SI A.O.I., AMENER SOCIETE CANADIENNE A PARTICIPER ET A SE POSITIONNER

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DEPARTMENT OF EXTERNAL AFFAIRS

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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 still in the planning stage which provide opportunities for Canadian suppliers:

TELEPHONIE RURALE

Approximate Value: 22 M\$
Financing Source : IBRD - World Bank.
Contact : AMBASSADE DU CANADA

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: RABAT

Market: MOROCCO

Sector : POWER & ENERGY EQUIP. & SERV.

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	95.00 \$M	108.00 \$M	130.00 \$M	160.00 \$M
Canadian Exports	1.00 \$M	1.00 \$M	0.00 \$M	10.00 \$M
Canadian Share of Market	1.00 %	0.09 %	0.00 %	0.60 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	43.00 %
FRANCE	35.00 %
ITALY	6.00 %
GERMANY WEST	5.50 %
SPAIN	3.00 %

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

Products/services for which there are good market prospects:

1. ENERGIE SOLAIRE ET AUTRES SYSTEMES PASSIFS
2. SYSTEME DE CONTROLE
3. INGENIEURS CONSEILS ET AUTRES SERVICES
4. MACHINES ET SYSTEMES ELECTRIQUES
5. ENERGIE NUCLEAIRE

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
- LIGNE DE CREDIT ACDI-SEE
- ET FINANCEMENT ACDI DE
- PRODUITS DE BASE

29/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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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

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 DE COMPAGNIES CANADIENNES AU MAROC
Expected Results: PREPARER DEUXIEME PHASE CENTRALE THERMIQUE JDRF LASFAR 1993-95 EVALUER POTENTIEL ET SE POSITIONNER POUR PRJET M^oJAARA.

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: KABAT

Market: MOROCCO

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

DEUXIEME PHASE JORF LASFAR	Approximate Value:	700 M\$
	Financing Source :	
	Contact :	AMBASSADE

PROJECT HYDROELECTRIQUE M ^e JAARA	Approximate Value:	115 M\$
	Financing Source :	
	Contact :	AMBASSADE

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: KABAT

Market: MOROCCO

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	180.00 \$M	170.00 \$M	185.00 \$M	209.00 \$M
Canadian Exports	0.77 \$M	0.51 \$M	18.00 \$M	64.00 \$M
Canadian Share of Market	0.40 %	0.30 %	9.70 %	30.00 %

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

Major Competing Countries

Market Share

FRANCE	33.00 %
SPAIN	22.00 %
DENMARK	7.00 %
SINGAPORE	0.00 %

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

Products/services for which there are good market prospects:

1. LOCOMOTIVES
2. RAILS
3. BANC D'ESSAI POUR REACTEURS D'AVION
4. BATEAUX DE PECHE
5. AMBULANCES
6. TRANSIT URBAIN

Factors contributing to current successful Canadian exports:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: RABAT

Market: MOROCCO

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: EXPLORER LA FAISABILITE DE PARTICIPATION CDNNE SUR LE PROJ.
Expected Results: FORMATION D'UN CONSORTIUM

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

Activity: ETUDE DE MARCHE POUR EQUIPMENTS FERROVIAIRES
Expected Results: IDENTIFIER MARCHE

Activity: ETUDE DE MARCHE POUR BATEAUX DE PECHE
Expected Results: IDENTIFIER MARCHE

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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 still in the planning stage which provide opportunities for Canadian suppliers:

ACHAT DE BATEAUX DE PECHE

Approximate Value: 300 M\$

Financing Source : OTHER

Contact : AMBASSADE DU CANADA

METRO DE CASABLANCA

Approximate Value: 0 M\$

Financing Source : OTHER

Contact : AMBASSADE DU CANADA

Post : RABAT

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Post/Contact</u>
89/06/15	CASABLANCA HANDICRAFTS SHOW, CASABLANCA, MOROCCO INFO BOOTH, ONLY	CONSUMER PRODUCTS A.AUBIN
89/09/00	WATER MISSION TO MOROCCO MISSION OUT, INDUSTRY	INDUSTRIAL MACHIN, PLANTS, SERV
89/10/10	4TH COMPUTER SHOW, CASABLANCA MOROCCO. INFO BOOTH, WITH GROUP	ADVANCED TECH. PROD. & SERV A.AUBIN

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: TUNIS

Country: TUNISIA

POUR LE GOUVERNEMENT TUNISIEN, L'ANEE 1988 ETAIT APPELEE A CONSOLIDER LE REDRESSEMENT FINANCIER ENREGISTRE EN 1987 ET A ASSURER LA RELANCE DE L'INVESTISSEMENT. CETTE ORIENTATION GOUVERNEMENTALE A ETE FREINEE PAR UNE VAGUE DE SECHERESSE ET UNE INVASION DE CRIQUETS QUI SE REPETERA PROBABLEMENT EN 1989. ELLES ONT ENTRAINE UNE BAISSSE IMPORTANTE DANS CERTAINS SECTEURS AGRICOLES. LES MESURES PRISES PAR LE PRESIDENT BEN ALI ET SON GOUVERNEMENT DEPUIS LE CHANGEMENT A LA PRESIDENCE DU 7 NOVEMBRE 1987 VISENT A INTRODUIRE UN CERTAIN DYNAMISME DANS L'ACTIVITE ECONOMIQUE DU PAYS ET A RESTAURER LA CONFIANCE CHEZ LES INVESTISSEURS. LE NOUVEAU GOUVERNEMENT S'EST EMPLOYE A ENCOURAGER LE SECTEUR AGRICOLE, PROMOUVOIR LE TOURISME, LIBERALISER LE COMMERCE ET DEVELOPPER LES REGIONS DU SUD. AU PLAN PRATIQUE, LE GOUVERNEMENT BEN ALI (COMPOSE EN MAJORITE D'UNE NOUVELLE GENERATION DE JEUNES ET DE TECHNOCRATES) A PRIS D'URGENCE LES DISPOSITIONS SUIVANTES: (1) L'AMELIORATION DE L'ENVIRONNEMENT ECONOMIQUE EN RENFORCANT CERTAINS SECTEURS JUGES SENSIBLES (ENERGIE, AGRICULTURE ET TELECOMMUNICATIONS); (2) LE SOUTIEN A L'INVESTISSEMENT EN INSTAURANT DES CREDITS A MOYEN TERME ET EN ADOPTANT UN NOUVEAU CODE DES INVESTISSEMENTS POUR LES SECTEURS INDUSTRIEL ET AGRICOLE; (3) LE SOUTIEN AUX EXPORTATIONS; (4) LA LIBERALISATION DES IMPORTATIONS EN ENLEVANT LES RESTRICTIONS SUR LA QUASI-TOTALITE DES MATIERES PREMIERES, L'ENSEMBLE DES PIECES DETACHEES, LES PRODUITS SEMI-FINIS ET LES BIENS D'EQUIPEMENT; (5) LES AVANTAGES AUX HOMMES D'AFFAIRES EN AUGMENTANT L'ALLOCATION DESTINEE AUX VOYAGES D'AFFAIRES POUR LES EXPORTATEURS ET PRESTATAIRES DE SERVICES. IMPACT DES NOUVELLES MESURES: LA LIBERALISATION PROGRESSIVE DES IMPORTATIONS A ENTRAINE UN ACCROISSEMENT DE PRES DE 28% DU DEFICIT DE LA BALANCE DES MATIERES PREMIERES ET DES DEMIS PRODUITS. CEPENDANT, APRES UN RECU DE 1.6% EN 1986, LE PIB A PROGRESSE DE 5.8% EN 1987, LES EXPORTATIONS (HORS ENERGIE ET AGRICULTURE) ENREGISTRANT UNE FORTE PERCEE ET LA CONSOMMATION RESTANT SOUS CONTROLE. LA NORMALISATION DES RELATIONS DE LA TUNISIE AVEC LA LIBYE ET DES PERFORMANCES RECORD SUR LE PLAN DU TOURISME ONT BEAUCOUP CONTRIBUE A LA RELANCE ECONOMIQUE DU PAYS ET SURTOUT AU DYNAMISME DU SUD. L'ECONOMIE TUNISIENNE A DONC ENREGISTRE EN 1987/88 CERTAINS RESULTATS PERFORMANTS.

CONCLUSION: LA TUNISIE A VECU AVEC SUCCES UN CHANGEMENT HISTORIQUE DE SON EXISTENCE ET CONTINUE DE LUTTER CONTRE DES FLEAUX NATURELS QUI RISQUENT DE L'ENTRAINER DANS UNE CRISE ECONOMIQUE. CONTRAIREMENT A SON VOISIN L'ALGERIE, LE PAYS CONSERVE SON EQUILIBRE ECONOMIQUE ET SOCIAL COMME EN TEMOIGNENT LE RETOUR DE CERTAINS INVESTISSEURS ETRANGERS ET LA REPRISSE DE CERTAINS GRANDS PROJETS. LA TUNISIE, QUI GERE BIEN SON ECONOMIE ET DONT LE PLAN EST CHAJEMENT APPROUVE PAR LES INSTANCES INTERNATIONALES, VA S'EFFORCER DE RESTRUCTURER ET D'ASSAINIR LE SECTEUR INDUSTRIEL ET PROCEDER DANS LA MESURE DU POSSIBLE A LA PRIVATISATION DES ENTREPRISES PUBLIQUES. SON EFFORT DE RATIONALISATION ECONOMIQUE S'ETENDRA AUX SUBSIDES QUI CONTINUERONT D'ETRE GRADUELLEMENT ELIMINES. A MOYEN TERME, IL EST DE PLUS EN PLUS QUESTION D'INSTAURER LA CONVERTIBILITE DU DINAR.

29/05/89

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RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: TUNIS

Country: TUNISIA

DANS L'IMMEDIAT, LE GOUVERNEMENT SE CONCENTRERA SUR DES SECTEURS IMPORTANTS POUR SON AVENIR ECONOMIQUE A SAVOIR L'AGRICULTURE, LE TOURISME, ET LES DOMAINES D'EXPORTATION GENERATEURS DE DEVISES, QUI VONT PROBABLEMENT CONTINUER A S'AGRANDIR. LES SERVICES RELIES A L'EXPANSION DE A BENEFICIER D'UNE ATTENTION PARTICULIERE DE LA PART DU GOUVERNEMENT. PARMI LES SECTEURS PRIORITAIRES DE DEVELOPPEMENT ECONOMIQUE POUR LA TUNISIE, CERTAINS CORRESPONDENT CLAIREMENT AUX DOMAINES DE COMPETENCE DU CANADA ET NOUS SONT D'UN INTEREST PARTICULIER, A SAVOIR LES PRESTATIONS DE SERVICES D'INGENIEURS CONSEILS, L'AGRICULTURE, LES TELECOMMUNICATIONS, LES MINES ET L'ENERGIE, LE BOIS ET LES DERIVES.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 EXPORT PROMOTION PRIORITIES

Mission: TUNIS

Country: TUNISIA

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
LES PTT CONTINUENT LA MODERNISATION DE LEURS INSTALL.; REMPLACEMENT DES SYSTEMES/EQUIPEMENTS DE TELEDIFFUSION; -INSTALLATION D'UN SYSTEME DE COMMUTATION EN PAQUET; - INSTALLATION D'UN RESEAU DE TELEPHONIE RURALE - ELARGISSEMENTS DU PARC TELEX; -DEVELOPPEMENT D'UN SYSTEME DE GESTION DU SPECTRE;-CREATION D'UN RESEAU CABLE POUR LA TELEVISION.
2. OTHER SERVICES
L'EXPERTISE ET L'EXPERIENCE CANADIENNES SONT TRES CONNUES DANS PLUSIEURS SECTEURS TELS QUE LES AUDITES ENERGETIQUES, L'INFORMATIQUE, LE GENIE CIVIL, LE DEVELOPPEMENT URBAIN, ELECTRIQUE ET TOURISTIQUE.
3. AGRI & FOOD PRODUCTS & SERVICE
DEVELOPPEMENT ET EXPLOITATION DE PLUSIEURS SYSTEMES D'IRRIGATION; -DEVELOPPEMENT DE L'INDUSTRIE DE TRANSFORMATION DES PRODUITS ALIMENTAIRES; -AMELIORATION DE LA RACE LOCALE DES VACHES; -INTRODUCTION DE L'ACQUACULTURE ET TRANSFORMATION DU POISSON.

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

1. MINE, METAL, MINERAL PROD & SRV
2. OTHER SERVICES

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: TUNIS

Market: TUNISIA

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: ANIMAL, POULTRY BREEDING STOCK

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1.70 \$M	15.00 \$M	20.00 \$M	25.00 \$M
Canadian Exports	0.00 \$M	0.13 \$M	0.00 \$M	3.00 \$M
Canadian Share of Market	0.00 %	0.09 %	0.00 %	12.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	50.00 %
NETHERLANDS	35.00 %
GERMANY WEST	10.00 %
OTHER COUNTRIES	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. GENISSES
2. SEMENCES HOLSTEIN
3. TRANSF. TECHN. DANS DUMAINE INSEMINATION ARTIFICIEL.
4. TRANSPLANTATION EMBRYONNAISE
5. RECHERCHES VETERINAIRES

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
- Market prospects have not been adequately explored
- CONDITIONS SANITAI-
- RES
- IL S'AGIT D'UN PROB. D'ORDRE SANI-
- TAIRE (VACCIN IBRI. SOLUTION RESIDE

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: TUNIS

Market: TUNISIA

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

Activity: MAINTENIR PRESSIUN POUR REUNIR LE COMITE DE VIGILANCE(MIN.AG
Expected Results: SIGNATURE D'UNE NOUVELLE CONVENTION SANITAIRE BILATERAL AVEC
LE CDA.

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

Activity: PREPARER MISSION AGRICOLE AU CANADA (6-89)
Expected Results: OPPORTUNITE IDEALE POUR FAIRE CONNAITRE L'EXPERTISE CONNE
DANS PLUSIEURS DOMAINES Y COMPRIS L'ELEVAGE.

Activity: PREPARER PARTICIPATION CONNE A LA FOIRE AGRICOLE SIAMAT
Expected Results: AMELIORER LE PROFIL DE L'INDUSTRIE CONNE ET PREPARER LE
TERRAIN POUR LES VENTES.

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.A LA SOC.SEMEX CDA DANS LEURS EFFORTS DE PENETRATION
Expected Results: SOUMISSIUN A DES AUI ET OBTENTION D'UN CONTRAT.

Activity: ENCOUR.MEME SOC.A POUSSER SES DISC.AVEC AUTOR.LOCALES POUR
Expected Results: REALISATION D'UN PROJET MIXTE ET AUGMENTATION DES VENTES.

Activity: IDENTIFICATION DE QUELQUES AGENTS LOCAUX POUR APPUYER INT.CO
Expected Results: MEILLEUR SUIVI DES DEMARCHES AUPRES DES AUTORITES LOCALES.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: TUNIS

Market: TUNISIA

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

ACQUISITION DE GENISSES (Y COM- Approximate Value: 15 M\$
PRIS GENISSES PLEINES) Financing Source : DOM - Domestically funded
Contact : LASSAAD BOURGUIBA, TUNIS, TLX
15324, EXTOTT/GAT/AUBIN/9908134

ACQUISITION DE SEMENCES CONGE- Approximate Value: 1 M\$
LEES DE TAUREAUX Financing Source : DOM - Domestically funded
Contact : LASSAAD BOURGUIDA, TUNIS, TLX
15324, EXTOTT/GAT/AUBIN/9908134

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: TUNIS

Market: TUNISIA

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: SEEDS & SPECIAL CROPS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	38.00 \$M	45.00 \$M	30.00 \$M	35.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.00 \$M	1.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	3.00 %

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

Major Competing Countries

Market Share

FRANCE	35.00 %
AUSTRIA	30.00 %
NETHERLANDS	30.00 %
OTHER COUNTRIES	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. SEMENCES DE POMMES DE TERRE
2. CONSTR.D'ENTREPOT FRIGORIFIQUE DE POMME DE TERRE
3. COOP.EN MAT.D'ANALYSE & EXPERIMENT.DES VARIETES

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Performance of local agent or representative
- CONDITIONS SANITAI-
- RES
- LES TUNIS.REFUSENT LES VAR.CDNNES
- POUR DES RAISONS SANITAIRES(MALADIE

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: TUNIS

Market: TUNISIA

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

Activity: CONTINUER LES DISC.AVEC RESPON.S.TUNIS.A PROPOS DES PROB.SAN.
Expected Results: SIGNATURE D'UNE CONVENTION BILATERALE REGLANT LES QUESTIONS TECHNIQUES.

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

Activity: MISSION AGRICOLE AU CANADA (6-89)
Expected Results: OCCASION IDEALE POUR MONTRER SUR PLACE LES CAPACITES DE L'INDUSTRIE CANADIENNE.

Activity: FOIRE SIAMAT (TUNIS 10-89)
Expected Results: FAIRE MIEUX CONNAITRE LES VARIETES CANADIENNES

Activity: SEMINAIRE SUR LA TECHNOLOGIE DES SEMENCES DE POMMES DE TERRE
Expected Results: ELIMINER LES OBSTACLES ET LES DOUTES CONCERNANT L'EXISTENCE DE MALADIES AU CDA

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

Activity: ASSISTANCES A POTATOES CANADA DANS SES EFFORTS
Expected Results: IMPORTATIONS DE QUELQUES QUANTITES DE VARIETES DEJA RECONNUES.

Activity: SENSIBILISER LES UTILISATEURS LOCAUX SUR LA BONNE QUALITE
Expected Results: MEILLEURE COMPREHENSION ET AMELIORATION DU PROFIL DE L'INDUSTRIE CANADIENNE

Activity: AIDER A DEV.UN PROJ.DE FORMATION ENTRE 3 MIN.D'AGRICULTURE
Expected Results: TUNISIE POURRA FAIRE DES CONTROLES LOCAUX INDEPENDANTS Y INCLUS LES SEMENCES CONNES.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: TUNIS

Market: TUNISIA

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

VENTE COMMERCIALE DE VARIETE	Approximate Value:	1 M\$
KENNEBEC	Financing Source :	DOM - Domestically funded
	Contact	: L.BOURGUIBA, TUNIS, TLX 15324
		POTATDES CDA(B.OUELLETTE)

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: TUNIS

Market: TUNISIA

Sector : FISHERIES, SEA PRODUCTS & SERV.

Sub-Sector: MARINE HARV, PROD MACH & EQUIP

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	40.00 \$M	60.00 \$M	70.00 \$M	95.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.04 \$M	3.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.05 %	3.00 %

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

Major Competing Countries

Market Share

FRANCE	35.00 %
ITALY	25.00 %
NETHERLANDS	20.00 %
JAPAN	15.00 %
OTHER COUNTRIES	5.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. CHALUTIERS
2. UNITES DE TRANSPORT FRIDORIFIQUE
3. MOTEURS MARINS
4. CHAINES DE CONGELATION
5. UNITES DE TRANSFORMATION
6. CONSTRUCTION PORTUAIRE
7. EMBALLAGE METALLIQUE

Factors contributing to current successful Canadian exports:

- Import duties are moderate
- PEMD support
- Strong sectoral capability in Canada

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Market prospects have not been adequately explored

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: TUNIS

Market: TUNISIA

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

Activity: CONT.ASSIST.AUX COS QUI ONT DEJA EU DES RAPP.AVEC MARCH.LOC.
Expected Results: OBTENTION D'UN CONTRAT PAR AU MOINS UNE FIRME CANADIENNE.

Activity: ASSIST.A LA SOC.HIKE METAL DANS SES EFF.DE PENETR.DU MARCHÉ.
Expected Results: VENTE DE QUELQUES UNITES DE PECHE (CHALUTIERS)

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

Activity: ,MISSION AGRICOLE AU CANADA (CANADA 9-89)
Expected Results: FAIRE CONNAISSANCE DES CAPACITES CONNES DANS LE DOMAINE DE LA PECHE.

Activity: SALON INT'L DE LA PECHE & L'AGRICULTURE SIPAT(TUNIS 9-90)
Expected Results: MONTRER SUR PLACE LES AVANTAGES DE TECHNOLOGIE CONNE ET AMELIORER LE PROFIL DE NOTRE INDUSTRIE.

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

Activity: ENCOUR.SOC.MEDELPECHE DE POUSSER LES DISC.AVEC PART.LOCAL
Expected Results: SIGNATURE D'UN CONTRAT POUR UN PROJET MIXTE.

Activity: ASSIST.A LA SOC.MARLIN DETROIT DIESEL DANS SES DEMARCH.COMM.
Expected Results: VENTE DE QUELQUES UNITES DE MOTEURS MARINS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: TUNIS

Market: TUNISIA

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

VENTE DE CHALUTIERS

Approximate Value: 35 M\$

Financing Source : DOM - Domestically funded
EDC - Export Dev Corporation
CIDA - Cdn Int'l Dev Agency

Contact : TUNIS - L.BOURGUIBA TLX:15324
(DOMCAN TN)

VENTE EQUIPEMENT (MOTEUR)

Approximate Value: 5 M\$

Financing Source : DOM - Domestically funded
EDC - Export Dev Corporation
CIDA - Cdn Int'l Dev Agency

Contact : TUNIS - L.BOURGUIBA TLX:15324
(DOMCAN TN)

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: TUNIS

Market: TUNISIA

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: TELECOM, DATACOM, SAT, SPACECOM

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	55.00 \$M	25.00 \$M	26.00 \$M	52.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.00 \$M	14.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	26.00 %

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

Major Competing Countries

Market Share

FRANCE	45.00 %
SWEDEN	30.00 %
GERMANY WEST	8.00 %
JAPAN	7.00 %
ITALY	7.00 %
SPAIN	3.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. SYSTEME DE TELEPHONIE RURALE
2. TRANSMISSION DES DONNEES EN PAQUET
3. TERMINAUX DE TELEX

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored
- FORTE CONCURRENCE TRADITIONNELLE
- DES FRANCAIS ET DES SUEDOIS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: TUNIS

Market: TUNISIA

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

Activity: DEPENDANT DE L'ACCORD DE L'ACDI/SEL, PREP. D'UNE ETUDE DE FAIS
Expected Results: DEVELOPPEMENT D'UN CAHIER DES CHARGES AVEC SPECIFICATIONS CANADIENNES.

Activity: ASSISTER NORTHERN TELECOM DANS LEUR NEGOC. POUR LE PROJ. TRANS
Expected Results: SELECTION DE NORTHERN TELECOM ET OCTROI DE CONTRAT

Activity: ASSISTER SR TELECOM DANS LEURS NEGOC. POUR LE PROJ. DE TEL. RUR
Expected Results: SELECTION DU SR TELECOM ET OCTROI DE CONTRAT

Activity: ORG. PARTIC. CDNNE A LA FOIRE DE TELECOM 88 & JOURNEES TECHN.
Expected Results: AMELIORER LE PROFIL CDN DANS CE SECTEUR COMME LEADER MONDIAL ET APPUYER SOUMISSIONS CDNNE EN COURS D'EVALUATION

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

Activity: PREP. D'UNE MISS. AU CDA DES RESP. TUNISIENS DE TELECOM.
Expected Results: INFLUENCER DECISIONS TUNISIENNES EN FAVEUR DES SOUMISSIONS CDNNE AUX AOI

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

Activity: ENCOURAGER PART. TUNIS. AU PROG. DE FORMATION DU TEMIC
Expected Results: MEILLEURE COMPREHENSION DES SYSTEMES DE TELECOMMUNICATIONS CANADIENS.

Activity: PROMOUVOIR L'EXPERTISE CDNNE EN MAT DE LA GESTION DU SPECTRE
Expected Results: SOUMISSION A UN AOI PAR AU MOINS UN GROUPE CDN.

Activity: IDENT UN PART LOCAL POUR UN SPOUMIS CDN CONC AOI TERM TELEX
Expected Results: SOUMISSION CONJOINTE PAR UNE FIRME CANADIENNE

Activity: ORG UNE VIS AU CDA DU DGT POUR CONNAITRE LES EXPLOIT. DU RES.
Expected results: CONCRETISER LE CONTRAT EN FAVEUR DU CDA & NORTHERN TELECOM AVEC POSSIBILITE DE CREATION D'UN NOUVEAU JV EN TUNISIE

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: TUNIS

Market: TUNISIA

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

ACHAT DE TERMINAUX DE TELEX

Approximate Value: 9 Ms
Financing Source : B.C. - Buyer Credits required
Contact : P.FURESZ, TUNIS, TLX:15324 DOC
OTT/DMS (PATRICK JULIEN)

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: TUNIS

Market: TUNISIA

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: BROADCASTING, INC. CABLE TV

Market Data	2. Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1.70 \$M	1.70 \$M	4.00 \$M	5.40 \$M
Canadian Exports	0.00 \$M	0.00 \$M	1.00 \$M	3.00 \$M
Canadian Share of Market	0.00 %	0.00 %	25.00 %	0.55 %

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

Major Competing Countries

Market Share

FRANCE	45.00 %
GERMANY WEST	40.00 %
TUNISIA	8.00 %
OTHER COUNTRIES	7.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. EMETTEURS TV
2. EMETTEURS RADIO
3. SYSTEMES RESEAU CABLE
4. ETUDE - RENOVATION DE STATION RADIO JEDAIDA
5. ETUDE RENOUVELLEMENT DU RESEAU FAISCEAUX HERTZIENS

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Fairs and Missions support
- CIDA programs

Factors for Canadian exports not reaching market potential:

- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored
- FORTE CONCURRENCE FRANCAISE

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: TUNIS

Market: TUNISIA

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

Activity: ASSIST. CCC & LR TELECOM DANS LEUR NEG. POUR LA POURS. DU PROJ.
Expected Results: OCTROI DU CONTRAT POUR LE CANADA

Activity: DEPENDANT DA L'ACCORD D'ACDI/SEL, PREP. D'UNE ETUDE DE FAISIB.
Expected Results: DEVELOPPEMENT D'UN CAHIER DES CHARGES AVEC SPECIFICATIONS CANADIENNES.

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

Activity: PREPARATION D'UNE MISSION AU CDA DES RESP. TUNIS. DE TELEDIF.
Expected Results: PART. CONNE AUX AOI POUR EMETTEURS RADIO/TV & A LA CREATION D'UNE SOC. MIXTE POUR EXPLOITER LE PROJ. PILOTE RESEAU CABLE.

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

Activity: SENSIBILISER LES PARTENAIRES CDNS & TUNIS. POUR POURSUIVRE EN
Expected Results: SOUMISSION A L'ACDI PAR UN GROUPE TUNISO-CANADIEN

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: TUNIS

Market: TUNISIA

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

EMETTEURS TV POUR ZONES D'OM- Approximate Value: 1 M\$
BRE Financing Source : EDC - Export Dev Corporation
CIDA - Cdn Int'l Dev Agency
Contact : PETER FURESZ, AMB. DU CANADA,
TLX 15324,DOCOTT/DMS(P.JULIEN)

ETUDE - RENOVATION DE STATION Approximate Value: 0 M\$
RADIO DE JEDAIDA Financing Source : CIDA - Cdn Int'l Dev Agency
DOM - Domestically funded
Contact : PETER FURESZ, AMB. DU CANADA,
TLX 15324,DOCOTT/DMS(P.JULIEN)

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: TUNIS

Market: TUNISIA

Sector : FOREST PRODUCTS, EQUIP, SERVICES

Sub-Sector: WOOD AND WOOD PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	50.00 \$M	65.00 \$M	62.00 \$M	70.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	4.20 \$M	5.00 \$M
Canadian Share of Market	0.00 %	0.00 %	6.80 %	7.10 %

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

Major Competing Countries	Market Share
UNION OF SOVIET SDC REP	36.00 %
SCANDINAVIA	22.00 %
ROMANIA	18.00 %
POLAND	12.00 %
YUGOSLAVIA	7.00 %
CHILE	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 SPF
2. BOIS DE L'OUEST - HEMLOCK
3. BOIS BLANC - DOUGLAS FIR

Factors contributing to current successful Canadian exports:

- Import duties are moderate
- Aggressive marketing
- Provincial export promotion
- CIDA programs
- Competitive pricing
- Bilateral economic trade agreement
- Competitive Canadian financing
- L'UTILISATION DE LA LIGNE
- DE CREDIT DE PRODUITS DE
- BASE DE L'ACDI;

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: TUNIS

Market: TUNISIA

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Restrictive standards
- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- COUTS DE TRANSPORT ELEVES

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

Activity: COORD.EFFORTS ENTRE GROUP.DU BOIS & AUT.CDNNES POUR CONCLURE
Expected Results: LIVRAISON DE 20.000 M3 DE SPF EN TUNISIE

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

Activity: PREPARER MISS.D'EXPORTATEUR DE BOIS CANADIENS EN TUNISIE
Expected Results: SENSIBILISER UTILISATEURS TUNISIENS SUR LE BOIS CANADIEN ET ACHAT DE NOS PRODUITS

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

Activity: ENCOURAGER DES EXPORT.DU BOIS DE L'O.A VISITER DE NOUV.DIFF.
Expected Results: MEILLEURE COMPREHENSION DES BESOINS TUNISIENS ET POSSIBILITE DE PLACER DES .COMMANDES

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: TUNIS

Market: TUNISIA

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

SPF	Approximate Value:	4 M\$
	Financing Source :	
	Contact :	
HEMLOCK	Approximate Value:	3 M\$
	Financing Source :	
	Contact :	
PIN D'OREGON	Approximate Value:	5000 M\$
	Financing Source :	
	Contact :	

-RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: TUNIS

Market: TUNISIA

Sector : FOREST PRODUCTS, EQUIP, SERVICES

Sub-Sector: PULP AND PAPER PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	20.00 \$M	35.00 \$M	25.00 \$M	30.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.00 \$M	3.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	10.00 %

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

Major Competing Countries	Market Share
NORWAY	60.00 %
AUSTRIA	15.00 %
FRANCE	15.00 %
DENMARK	5.00 %
OTHER COUNTRIES	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. PAPIER JOURNAL
2. PAPIER KRAFT
3. PATE A PAPIER

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Import duties are high
- Market prospects have not been adequately explored

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: TUNIS

Market: TUNISIA

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

Activity: CONT.ASSIST.AUX COS AYANT MANIF.UN INT.POUR LE MARCH.TUNIS.
Expected Results: OBTENTION DE QUELQUES CONTRATS SURTOUT POUR PAPIER JOURNAL.

Activity: APPUI & ASSIST.A LA SDC.COURREY INTLICHARGE DE PROM.DE LIGNE
Expected Results: GARANTIR UNE MEILLEURE COMPETITIVITE DES OFFRES CONNES DES
AOI (GRACE A LCPB)

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

Activity: MISSION BOIS ET DERIVES (TUNIS/SFAX 04-90)
Expected Results: AMELIORER PROFIL DE L'INDUSTRIE CONNE (QUALITE,PRIX) ET
MIEUX CONNAITRE LE MARCHÉ LOCAL.

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

Activity: CONTINUER A SENS.IMPORT.LOCAUX SUR QUAL./PRIX DU PAPIER JOUR
Expected Results: SIGNATURE D'UN CONTRAT A LONG TERME

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: TUNIS

Market: TUNISIA

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

PAPIER JOURNAL

Approximate Value: 5 M\$
Financing Source : OTHER
Contact : L.BOURGUIBA, AMB DU CDA-TUNIS
COUREY INTL.(M.S.COUREY)

ACQUISITION PAR UNE FIRME PRI-
VEE DE PAPIER KRAFT

Approximate Value: 1 M\$
Financing Source : DOM - Domestically funded
Contact : L.BOURGUIBA, AMB DU CDA-TUNIS
COUREY INTL.(M.S.COUREY)

PATE A PAPIER POUR SNCPA

Approximate Value: 10 M\$
Financing Source : DOM - Domestically funded
Contact : L.BOURGUIBA, AMB DU CDA-TUNIS
COUREY INTL.(M.S.COUREY)

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: TUNIS

Market: TUNISIA

Sector : OTHER SERVICES

Sub-Sector: CONSUL & SERVS NOT ELSE SPECI

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	360.00 \$M	300.00 \$M	250.00 \$M	250.00 \$M
Canadian Exports	6.00 \$M	6.00 \$M	4.50 \$M	7.00 \$M
Canadian Share of Market	1.50 %	2.00 %	1.80 %	2.80 %

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

Major Competing Countries	Market Share
FRANCE	20.00 %
ITALY	18.00 %
GERMANY WEST	15.00 %
EUROPE	30.00 %
OTHER COUNTRIES	12.00 %
TUNISIA	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. BARRAGES/ASSAINISSEMENT
2. AUDITES ENERGETIQUES
3. AGRICULTURE -ENTREPTS FRIGORIFIQUES -AQUACULTURE
4. CADASTRE ET CARTOGRAPHIE
5. INFORMATIQUE -INFORMATISATIONS DES ORGANES PUBLIQ.

Factors contributing to current successful Canadian exports:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: TUNIS

Market: TUNISIA

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Market prospects have not been adequately explored
- FORTE CONCURRENCE EUROPEENNE

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

Activity: APPUYER LE CONSORTIUM TRIAD/CPCS DANS LEUR POURSUITE DU PROJ
Expected Results: SELECTION DU GROUPE CANADIEN ET OCTROI DU CONTRAT.

Activity: APP.LES 3 FIRM.CDNNES DANS LEUR POURSUITE DU PROJ.DES ETUDES
Expected Results: SELCTION D'UNE FIRME CDNNE ET OCTROI DU CONTRAT

Activity: AIDER SNC DANS LA PREPARATION DE LEUR OFFRE FINANCIERE POUR
Expected Results: PREPARATION DU CAHIER DES CHARGES PAR LE CANADA ET EVENTUEL-
LE SOUMISSION PAR FIRME CANADIENNE.

Activity: ASSISTER LA FIRME AGROVET DANS SES DEMARCHES DEJA ENTREP.
Expected Results: OBTENTION D'UN OU DE DEUX 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: ASSISTER CONSORTIUM DIRIGE PAR LA SNC DANS LA PREP.DE SOUMIS
Expected Results: SELECTION DU GROUPE CANADA ET NEGOCIATION DU CONTRAT.

Activity: ORGAN.DES MINI-SEM.SPEC.AU SEIN DE LA STEG SUR L'EXPERT.CDNN
Expected Results: MEILLEURE COMPREHENSION DU PROFILE DE L'INDUSTRIE CANADIENNE

Post : TUNIS

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Post/Contact</u>
89/05/06	INTERCAN '89 EDMONTON / ALGIER TUNIS, NAIROBI, HARARE, ANGOLA MISSION IN, TO INDUSTRY	OIL & GAS EQUIPMENT, SERVICES A. AUBIN
89/09/00	TELECOMMUNICATIONS MISSION FROM MAGHREB MISSION IN, TO INDUSTRY	ADVANCED TECH. PROD. & SERV

RPT81

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: YAOUNDE

Country: REPUBLIC OF CAMEROON

AU COURS DE L'ANNEE, LE CAMEROUN A TENTE UN RAPPROCHEMENT AVEC LES BAILLEURS DE FONDS TRADITIONNELS AFIN DE BENEFICIER D'APPORTS BUDGETAIRES DIRECTS, ET DANS CERTAINS CAS, DE REECHELONNEMENT DE DETTE. CES DISCUSSIONS ESSENTIELLEMENT BILATERALES N'ONT RECU QUE TRES PEU D'ECHOS FAVORABLES DANS LA MESURE OU LES BAILLEURS DE FONDS S'EN SONT TENUS A LA POSITION DU CLUB DE PARIS PRECONISANT UNE ENTENTE PREALABLE GLOBALE AVEC LE FMI. AVANT D'ENTAMER SES NEGOCIATIONS AVEC LE FMI ET DANS UN EFFORT D'AUTO-AJUSTEMENT LE GOUV BIYA A MIS SUR PIED UNE CELLULE DE CRISE DANS LE BUT D'APPLIQUER DES COUPURES BUDGETAIRES DANS LES DEPENSES D'OPERATIONS ET EN NOMMANT UN MINISTRE RESPONSABLE DU PLAN DE STABILISATION DONT LE PRINCIPAL OBJECTIF EST DE REFORMER ET DE RATIONNALISER L'APPAREIL ETATIQUE. AU COURS DE L'ANNEE QUI S'ACHEVE, LES MESURES SUIVANTES FURENT ENTREPRISES: REVISION DU CODE DES INVESTISSEMENTS, DIAGNOSTIQUE OPERATIONNEL ET AUDIT FINANCIER DE PRES DE 150 SOC.D'ETAT DONT CERTAINES SERONT LIQUIDEES, DEMANTELEES OU PRIVATISEES AU COURS DE 1989, MISE SUR PIED D'UNE DIRECTION DE LA PME/PMI AU MINDIC, AUGMENTATION DES TAUX DE DOUANES SUR LES PROD. DE LUXE, REECHELONNEMENT DES IMPAYES DE L'ETAT AUPRES DU SECTEUR PRIVE. DE PLUS, L'ETAT A REDUIT SON BUDGET NAT'L DE 650 A 600 MILLIARDS FCFA, PURTANT L'EDUCATION, LA SANTE & LA DEFENSE EN LEGERE HAUSSE DU BUDGET. CES DIVERSES ACTIONS ONT EU POUR EFFET DE SENSIBILISER LE PEUPLE CAMEROUNAIS A L'URGENCE DE LA SITUATION & A INTENSIFIER LE BESOIN DES DISCUSSIONS AVEC LE FMI. DESIREUX DE NE PAS ETRE MIS AU RANG DES AUTRES ETATS EN DIFFICULTE DE LA REGION, PAR LA COMMUNAUTE INT'L & PAR LE FMI, LE CAMEROUN A MIS LONGTEMPS A ACCEPTER ET A EXPLIQUER A SA POPULATION LES TERMES DES NEGOCIATIONS DEVENUS INEVITABLES. LES DISCUSSIONS, SUIVIES PLUS TARD, AU COURS DE L'ANNEE, DE MISSIONS LOURDES D'EXPERTS DE LA BANQUE MONDIALE ET DE D'AUTRES BAILLEURS DE FONDS MULTILATERAUX (BAD) EURENT POUR EFFET DE METTRE EN PLACE UN CADRE DE REFORME INSTITUTIONNELLES QUI DEVRAIT ETRE MIS EN OPERATION AU PRINTEMPS 1989. ENTRETEMPS, LE CAMEROUN SIGNAIT LE 19 SEPT. DERNIER, UN ACCORD CADRE AVEC LE FMI, QUIA A PERMIS EN OUTRE D'INJECTER DES RESSOURCES FINANCIERES NOUVELLES, QUOIQUE LIMITEES, POUVANT SUFFIRE A RASSURER TEMPORAIREMENT LES BAILLEURS DE FONDS DONT LES ARRERAGES SE GONFLAIENT MENSUELLEMENT ET SANS ARRET DEPUIS LES 12 DERNIERS MOIS. AU DEBUT NOV., L'ETAT RECEVAIT APPROXIMATIVEMENT 42 MILLIONS DE FCFA DE LA BANQUE MONDIALE A L'INTENTION DU PROJET D'URBANISATION ET D'ASSAINISSEMENT DE DOUALA & DE YAOUNDE, AINSI QUE 20 MILLIARDS FCFA DE LA FRANCE POUR LA REHABILITATION DES ENTREPRISES ET POUR COUVRIR LES IMPAYES DUS AUX SOCIETES FRANCAISES. CES INJECTIONS DE FONDS SONT TOUJOURS INSUFFISANTES AU EGARD, NOTAMMENT, A L'IMPORTANCE DES IMPAYES EXISTANTS. NOUS CROYONS QUE LE CAMEROUN DEVRA, A COURT TERME, DEMANDER UN NOUVEAU FINANCEMENT ET OU UN REECHELONNEMENT DE SA DETTE PUBLIQUE, MALGRE LES COUPURES MAJEURES DEJA EFFECTUEES, DES DECISIONS IMPORTANTES DE NATURE BUDGETAIRE SE PRENNENT REGULIEREMENT ET AFFECTENT A LA HAUSSE LE NIVEAU DE LA DETTE PUBLIQUE DE CE PAYS. L'ATTRIBUTION DES CONTRATS DE CONSTRUCTION DE L'AEROPORT YAOUNDE II (INVESTISSEMENT REDIMENSIONNE DE 350 A 100 MILLIONS DE DOLLARS SOUS LA PRESSION DU FMI), L'ATTRIBUTION DU CONTRAT DES CENTRAUX

RPT81

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: YAOUNDE

Country: REPUBLIC OF CAMEROON

TELEPHONIQUE REMPORTEE PAR SIEMENS AINSI QUE L'INTENTION DES ESPAGNOLS DE CONSTRUIRE 5 LYCEES EN OUTRE DES 6 LYCEES TECHNIQUES DU PROJET SOFATI SONT QUELQUES EXEMPLES CHOISIS PARMI D'AUTRES. L'IMPORTANCE NOUS APPARAIT AUJOURD'HUI PLUS EVIDENTE QUE PAR LE PASSE D'OFFRIR UN FINANCEMENT A 100% JOUK VOIR LA PORTION CONCESSIONNELLE DE LA DETTE ETRE EFFACEE. LA COMPLEXITE DES PROBLEMES FINANCIERS DU CAMEROUN ENTRAINERA, AU COURS DES PROCHAINES ANNEES, UN REMUE-MENAGE BANCAIRE IMPORTANT DANS CE PAYS. DEJA QUELQUES BANQUES ETRANGERES A L'EXCEPTION DES QUELQUES-UNES I.E. BCC, BICIC SERONT DANS L'OBLIGATION DE REDUIRE TEMPORAIREMENT LEURS OPERATIONS TANDIS QUE D'AUTRES, A DEFAUT D'ETRE RENFLOUEES PAR L'ETAT, DEVRONT FERMER ETANT VIRTUELLEMENT EN FAILLITE (CAMEROUN BANK). CE SECTEUR D'ACTIVITES INSTITUTIONNELLES FERA PARTIE DE NOS ETUDES PONCTUELLES AU COURS DE LA PROCHAINE ANNEE. EN CONCLUSION, IL APPARAIT CLAIR QUE LA POSSIBILITE POUR LE CANADA DE DECROCHER DES CONTRAT COMMERCIAUX D'IMPORTANCE AU CAMEROUN SERA INTIMEMENT LIEE A NOTRE APTITUDE A OFFRIR DES MECANISMES DE FINANCEMENT ALLECHANTS. DE PLUS, IL S'AVERERA IMPERATIF DE CONCENTRER NOTRE ATTENTION SUR DES PROJETS DONT LE DEGRE DE PRIORITE EST DEMONTRE. D'AUTRE PART, NOUS NOUS APPLIQUERONS A SUIVRE L'EVOLUTION DES PROGRAMMES D'AJUSTEMENTS STRUCTURELS ET SECTORIELS DANS LE BUT D'OPTIMISER LES OPPORTUNITES D'AFFAIRES AU EGARD NOTAMMENT AUX FINANCEMENTS MULTILATERAUX (BANQUE MONDIALE, BAD) A ETRE MIS EN PLACE. NOTRE STRATEGIE COMMERCIALE S'APPLIQUERA DE MEME A RENFORCER NOS LIENS D'AFFAIRES AVEC LE SECTEUR PRIVE CAMEROUNAIS A TRAVERS, NOTAMMENT, NOTRE PROGRAMME DE COOPERATION INDUSTRIELLE. ENFIN, NOUS VEILLERONS DE PRES AU SUIVI DE LA REALISATION DE NOS PROJETS DEJA EN COURS D'EXECUTION.

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 EXPORT PROMOTION PRIORITIES

Mission: YAOUNDE

Country: REPUBLIC OF CAMEROON

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

1. CONSTRUCTION INDUSTRY

DANS LE CADRE D'UN FINANCEMENT CDN, NOS FIRMES SONT DEJA ASSOC A LA PHASE FINALE DES TRAVAUX DU PROJ D'ADDUCTION D'EAU DE YAOUNDE. UN CONSORTIUM DE SOC S'EST POSITIONNE EN VUE DE LA REALISATION DU PROJET D'ADDUCTION D'EAU DE DOUALA ALORS QUE LE CONTROLE ET LA SUPERVISION DU-DI PROJET EST FINANCE PAR LE CANADA.

2. TRANSPORT SYS, EQUIP, COMP, SERV.

RENFORCER LA PRESENCE DES FOURNISSEURS CANADIENS D'EQUIPEMENTS ET DE SERVICES EN IDENTIFIANT DES OPPORTUNITES D'APPROVISIONNEMENT AUPRES D'ORGANISMES TELS QUE REGIFERCAM, MATGENIE, CAMAIR ET DIVERS MINISTRES UTILISATEURS.

3. POWER & ENERGY EQUIP. & SERV.

S'APPUYER SUR LA PRESENCE INSTITUTIONNELLE DU CANADA DANS LE SECTEUR POUR DEVELOPPER DE NOUVELLES OPPORTUNITES DE VENTES D'EQUIPEMENT ET DE SERVICES AUPRES DE LA SONEL. LE CAMEROUN PREVOIT DE PLUS D'AUGMENTER SA CAPACITE HYDRO-ELECTRIQUE PAR LA CONSTRUCTION DE BARRAGES.

4. DEFENCE PROGRAMS, PRODUCTS, SERV

DES BESOINS SPECIFIQUES DES FORCES ARMEES CAMEROUNAISES PEUVENT ETRE COMBLES PAR DES FOURNISSEURS CANADIENS EN PRENANT AVANTAGE DU FINANCEMENT CANADIEN DISPONIBLE.

5. FOREST PRODUCTS, EQUIP, SERVICES

LA PROGRAMMATION D'INTERVENTION CANADIENNE ET DE BAILLEURS DE FONDS MULTILATERAUX DANS CE SECTEUR OFFRE UN EVENTAIL DE PROJETS INTERESSANTS A MOYEN TERME POUR NOS EXPORTATEURS.

6. EDUCATION, MEDICAL, HEALTH PROD

L'ADJUDICATION GRE A GRE DE L'IMPORTANT PROJET DE LYCEES TECHNIQUES ET SON VOLET FORMATION COUPLEE AUX AUTRES PROJETS DANS CE SECTEUR DEVRAIENT ACCROITRE LA PRESENCE DU CANADA DANS CET AUTRE SECTEUR PRIORITAIRE.

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

- | | |
|-------------------------------------|--------------------------------------|
| 1. CONSTRUCTION INDUSTRY | 4. POWER & ENERGY EQUIP. & SERV. |
| 2. AGRI & FOOD PRODUCTS & SERVICE | 5. TRANSPORT SYS, EQUIP, COMP, SERV. |
| 3. FOREST PRODUCTS, EQUIP, SERVICES | |

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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 (Estimated)	Next Year (Projected)
Market Size	74.00 \$M	70.00 \$M	75.00 \$M	80.00 \$M
Canadian Exports	2.00 \$M	4.00 \$M	4.00 \$M	4.50 \$M
Canadian Share of Market	2.70 %	5.70 %	5.30 %	5.50 %

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. EQUIPEMENT DE TRANSPORT TERRESTRE
2. EQUIPEMENT AERIEN
3. MUNITIONS
4. EQUIPEMENT DE COMMUNICATION

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
- 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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RPTC1

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 2 HELICOPTERES A LA SECUR.
Expected Results: MISE EN PLACE DU FINANCEMENT ET LIVRAISON DES APPAREILS

Activity: RE-ACTUALISER LE CONTRAT DE FOURNITURE DE CAMIONS DE TRANSP.
Expected Results: ENTENTE ENTRE EXPORTATEURS ET FORCES ARMEES LOCALES

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

Activity: PRESENT.AUX AUTORITES LOCALES DE L'EXPERT.CDNNE DANS SECT.MI
Expected Results: QUELQUES CONTRATS DE FOURNITURES AUX FORCES ARMEES LOCALES

Activity: CONTACTS REGULIERS AUPRES DU MINISTERE DE LA DEFENSE
Expected Results: ETRE ALERTES DES POSSIBILITES DE CONTRATS DE FOURNITURE.
FORMATION AU CANADA D'OFFICIERS LOCAUX.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: YAOUNDE

Market: REPUBLIC OF CAMEROON

Sector : POWER & ENERGY EQUIP. & SERV.

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	190.00 \$M	200.00 \$M	235.00 \$M	220.00 \$M
Canadian Exports	12.00 \$M	12.00 \$M	14.00 \$M	18.00 \$M
Canadian Share of Market	6.30 %	6.30 %	6.00 %	8.00 %

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 GAZIERES ET HYDRO-ELECTRIQUES
2. SERVICES CONSEILS
3. MATERIEL ELECTRIQUE

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
- BARRIERES NON TARIFAIRES PRESENCE
- MARQUEE DE COMPETITEURS EUROPEENS

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RPTC1

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 CDN POURSUIVANT LA REALIS.D'UN PROJ.
Expected Results: ADJUDICATION GRE-A-GRE DU MANDAT D'EXECUTION SUITE A LA REALISATION DE L'AVANT-PROJET DETAILLE

Activity: POURSUIVRE NOS REPRESENTATIONS AUPRES DES AUTORITES LOCALES
Expected Results: PREPARATION DE L'AVANT-PROJET DETAILLE. FINALISATION DU MONTAGE FINANCIER

Activity: POURSUIVRE LE DEMARCHAGE AUPRES DE LA SONEL EN VUE DE FAIRE
Expected Results: AUGMENTATION DES FOURNITURES CANADIENNES DE MATERIEL ELECTRIQUE

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: YAOUNDE

Market: REPUBLIC OF CAMEROON

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	92.00 \$M	79.00 \$M	220.00 \$M	140.00 \$M
Canadian Exports	5.00 \$M	5.00 \$M	8.50 \$M	10.00 \$M
Canadian Share of Market	5.40 %	6.00 %	4.00 %	7.00 %

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

Major Competing Countries Market Share

GERMANY WEST	35.00 %
FRANCE	25.00 %
JAPAN	15.00 %
UNITED STATES OF AMERICA	10.00 %
OTHER COUNTRIES	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. EQUIPEMENTS FERROVIAIRES
2. EQUIPEMENTS PORTUAIRES
3. SERVICES CONSEILS (ROUTES)
4. NIVELLEUSES/PIECES
5. EQUIPEMENT D'AEROPORTS
6. PIECES DETACHEES AUTO

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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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: YAOUNDE

Market: REPUBLIC OF CAMEROON

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- MANQUE D'INTERET ET D'AGRESSIVITE
- DES CO CON

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

Activity: SUIVRE LE DEVELOP DU PROJ D'APPROV EN EQUIP PORTU DE L'ONPC
Expected Results: VENTES COMMERCIALES PAR FOURNISSEURS CANADIENS

Activity: SUIVRE LE PROJ DE GRANDES REVISIONS DE LOCO DE REGIFERCAM
Expected Results: OBTENTION DE SOUS-CONTRATS POUR CERTAINES SOCIETES CONNES

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 DIVERSES SOC CONNES POURSUIVANT DES CONTRATS D'INFOR
Expected Results: ADJUDICATION DE CERTAINS CONTRATS A CES SOCIETES

Activity: DEMARCHAGE ASSIDU AUPRES DE LA REGIFERCAM
Expected Results: AUGMENTER LA PRESENCE CANADIENNE DANS LE DOMAINE DES FOURNITURES FERROVIAIRES

Activity: S'ASSOC AUX BAILLEURS DE FONDS MULTIL(BM)DANS LEUR PROGRAM.
Expected Results: SUSCITER L'INTERET DE SOCIETES CANADIENNES A PARTICIPER AUX APPELS D'OFFRES A VENIR.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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 (Estimated)	Next Year (Projected)
Market Size	24.00 \$M	20.00 \$M	35.00 \$M	50.00 \$M
Canadian Exports	4.00 \$M	4.00 \$M	8.00 \$M	12.00 \$M
Canadian Share of Market	16.00 %	20.00 %	22.00 %	24.00 %

Cumulative 3 year export potential for
CDN products in this sector/subsector: 30-60 \$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. MATERIEL D'EXPLOITATION FORESTIERE ET DE SCIERIE
2. CONSULTATION
3. PHOTOCARTOGRAPHIE
4. PETIT MATERIEL 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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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: YAOUNDE

Market: REPUBLIC OF CAMEROON

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Market prospects have not been adequately explored
- SERVICE APRES-VENTE ABSENCE D'A-
- GENTS LOCAUX

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 CONJ AVEC SEE & ACDI
Expected Results: VENTE D'EQUIPEMENTS D'UNE VALEUR APPROXIMATIVE DE \$ 9 MIL-
LIONS EN 1989

Activity: SUIVRE L'EVOLUTION D'UN PROJ DE COMPLEXE FORESTIER INTEGRE
Expected Results: PARTICIPATION DE SOCIETES CANADIENNES A LA PHASE REALISATION

Activity: FINALISER L'ADJUDICATION D'UN MANDAT DE PHOTO-CARTOGRAPHIE
Expected Results: DEBUT DES TRAVAUX

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

Activity: PARTIC.AU MONT.FINANCIER D'UNE NOUV.PHASE D'INV.FORESTIER
Expected Results: OPERATIONNALISATION DE CETTE NOUVELLE PHASE EN 1989
(\$ 5 MILLIONS)

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: YAOUNDE

Market: REPUBLIC OF CAMEROON

Sector : EDUCATION, MEDICAL, HEALTH PROD

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	173.00 \$M	160.00 \$M	200.00 \$M	90.00 \$M
Canadian Exports	2.00 \$M	2.00 \$M	70.00 \$M	10.00 \$M
Canadian Share of Market	1.00 %	1.10 %	35.00 %	11.00 %

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 %
UNITED KINGDOM	8.00 %
SPAIN	5.00 %

Products/services for which there are good market prospects:

1. EQUIPEMENT TECHNIQUE DE CONSTRUCTION SCOLAIRE
2. PROGRAMMES DE FORMATION
3. EQUIPEMENTS DIDACTIQUES

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:

- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- SYSTEME EDUCATIF EST FRANCAIS

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: YAOUNDE

Market: REPUBLIC OF CAMEROON

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- BARRIERES NON TARIFAIRES

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

Activity: SUIVI PONCTUEL AUPRES DE LA PRESIDENCE RELATIVEMENT AU PROJ.
Expected Results: OCTROI GRE A GRE DES CONTRATS DE REALISATION, SURVEILLANCE ET CONTROLE.

Activity: VISITE DE REP PAR L'EXPORTATEUR CDN DANS LE PROJ DE CONSTR.
Expected Results: APPROBATION DU PROJET PAR LES AUTORITES LOCALES. ATTRIBUTION DU MARCHE.

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 DE REPRESENT DE HAUT NIVEAU VISANT A APPUYER L'OFFRE
Expected Results: OCTROI DU CONTRAT DE REALISATION

89/06/12 RP-A10 PEMD - Government Initiated Activities 1989

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Post : YAOUNDE

Start date Event Name, Location & Type Sector/Post/Contact

00/00/00	RESERVE FOR MINISTERIAL MISSION MISSION OUT, MINISTERIAL	GENERAL OR UNASSIGNED ISB
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RPTBL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: PRETORIA

Country: SOUTH AFRICA

SOUTH AFRICA: DESPITE THE FACT THAT THE MISSION DOES NOT UNDERTAKE A TRADE FUNCTION IN S.A. THE ECONOMIC SITUATION WITHIN THE COUNTRY IS CLOSELY MONITORED IN VIEW OF CANADA'S POLICY OF IMPLEMENTING TRADE SANCTIONS. FOR SOME YEARS THE ECONOMY HAS BEEN IN A DEPRESSED STATE BUT DURING THE THIRD AND FOURTH QUARTERS OF 1987 AND THE FIRST QUARTER OF 1988 THERE WERE SOME INDICATIONS OF A GENERAL IMPROVEMENT. THE INFLATION RATE AS REGISTERED BY THE CPI FELL BELOW 13% ON AN ANNUALISED BASIS AND INTEREST RATES FELL TO THE 12% LEVEL. HOWEVER, THE RECOVERY WAS SHORT LIVED AND SERVED TO ILLUSTRATE THE FRAGILITY OF THE S.A. ECONOMY. WITH ITS INABILITY TO RAISE LONG TERM FUNDING FOR DEVELOPMENT PROJECTS IN EXTERNAL MARKETS, THE NEED TO MAINTAIN A STRONG TRADE BALANCE TO MEET EXTERNAL DEBT COMMITMENTS AND ITS HEAVY RELIANCE ON GOLD SALES, THE INCREASED IMPORT DEMAND BROUGHT ABOUT BY INCREASED ECONOMIC ACTIVITY COULD NOT BE SUPPORTED. IN MID YEAR GOVERNMENT IMPOSED HEAVY IMPORT SURCHARGES TO DISCOURAGE IMPORTS AND ALLOWED THE BANK RATE TO RISE FROM 12% TO ITS CURRENT LEVEL OF 16%. BANK OVERDRAFT RATES HAVE RISEN TO 23% AND HOUSE MORTGAGES NOW STAND AT 17%. THESE MEASURES ARE COMBINING TO SLOW DOWN THE RATE OF GDP GROWTH FROM 4 TO JUST OVER 1.5%. THE S.A. RAND HAS CONTINUED TO DECLINE IN VALUE TERMS AGAINST ALL MAJOR CURRENCIES AND ACCORDING TO MONETARY OBSERVERS IT IS LIKELY THAT THIS TREND WILL CONTINUE FOR THE FORESEEABLE FUTURE. IT IS ANTICIPATED THAT GOVERNMENT WILL IMPOSE MORE STRINGENT MEASURES TO DISCOURAGE IMPORTS AND CONVERSELY ENCOURAGE EXPORTS IN THE NEAR FUTURE.

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RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: PRETORIA

Country: LESOTHO

DURING THE PAST YEAR LESOTHO HAS BENEFITTED FROM INCREASED ECONOMIC ACTIVITY OWING TO PROGRESS ON THE LESOTHO HIGHLANDS WATER SCHEME AND ON INGRESS OF LIGHT INDUSTRIES PARTICULARLY CLOTHING MANUFACTURERS FROM SOUTH AFRICA. EXPORT OF CLOTHING HAS INCREASED SIGNIFICANTLY OVER THE PAST TWELVE MONTHS WITH NEW COMPANIES TAKING ADVANTAGE OF LESOTHO'S POSITION AS A SADC MEMBER COUNTRY AND A LOME CONVENTION SIGNATORY. WITH A GROWING SECONDARY INDUSTRY SECTOR THERE MAY BE OPPORTUNITIES IN THE FUTURE FOR CANADIAN SUPPLIERS OF SMALL PRODUCTION MACHINERY TO EXPORT TO LESOTHO TEXTILES AND CLOTHING INDUSTRY AND ATTEMPT TO SECURE OPENINGS FOR CANADIAN CONSULTANTS AND PROJECT MANAGERS IN THE DEVELOPMENT SECTOR.

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RPT31

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: PRETORIA

Country: SWAZILAND

AS IN THE CASE OF LESOTHO THERE HAS BEEN A TENDENCY OVER THE PAST YEAR FOR S.A. COMPANIES TO MOVE TO SWAZILAND AND TAKE ADVANTAGE OF ITS INTERNATIONAL POSITION. WITH EXPORTS OF SUGAR, CITRUS AND WOOD PULP PERFORMING WELL AND AN EXPANDING PRIVATE SECTOR, THE ECONOMY IS COMPARATIVELY BOUYANT. IN THE COMING YEAR THE MISSION WILL CONCENTRATE ON THE MONITORING OF INDUSTRIAL DEVELOPMENTS, PROMOTE CANADIAN AIRCRAFT AND LOCOMOTIVES AND CREATE AN INFRASTRUCTURE OF AGENTS IN THE PRIVATE SECTOR. BOTH LESOTHO AND SWAZILAND HOWEVER ARE MEMBERS OF THE RAND MONETARY AREA WITH S.A. AND BECAUSE OF THE LOW VALUE OF THE RAND DUE IN PART TO THE S.A. POLITICAL SITUATION, BOTH ARE SUFFERING FROM A HIGH RATE OF INFLATION.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 EXPORT PROMOTION PRIORITIES

Mission: PRETORIA

Country: LESOTHO

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

1. AGRI & FOOD PRODUCTS & SERVICE
THE CIDA FUNDED DAIRY PROJECT WILL PRESENT OPPORTUNITIES FOR SUPPLY OF MILK TESTING KITS, LABORATORY EQUIPMENT, SEMEN AND VETERINARY MEDICINES.
2. CONSTRUCTION INDUSTRY
CONTINUING DEVELOPMENT OF LESOTHO HIGHLANDS WATER SCHEME, MASERU WATER SUPPLY SCHEME AND MASERU SEWAGE SCHEME PROVIDE ON-GOING REQUIREMENT FOR CONSULTANCY AND PROJECT MANAGEMENT SERVICES.
3. POWER & ENERGY EQUIP. & SERV.
DEVELOPMENT OF HYDRO COMPONENT OF HIGHLANDS WATER SCHEME MAY PROVIDE EXPORT OPPORTUNITIES FOR CANADIAN COMPANIES.
4. INDUSTRIAL MACHIN, PLANTS, SERV.
PRIVATE SECTOR DEVELOPMENT MAY CREATE DEMAND FOR PACKAGING MACHINERY AND THE LIKE. THIS TO BE INVESTIGATED IN DETAIL.
5. ADVANCED TECH. PROD. & SERV
LESOTHO TELECOMS CORP ARE INTENT ON INSTALLING RURAL TELEPHONE SYSTEM AND ASSOCIATED EQUIPMENT.

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

1. CONSTRUCTION INDUSTRY
2. ADVANCED TECH. PROD. & SERV

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RPT82

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 EXPORT PROMOTION PRIORITIES

Mission: PRETORIA

Country: SWAZILAND

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.
ROYAL SWAZI AIRWAYS IS CONSIDERING INCREASING ITS FLEET BY PROCURING COMMUTER AIRCRAFT. SWAZI RAILWAYS IS CONSIDERING POSSIBLE PURCHASE OF LOCOMOTIVES.
2. FOREST PRODUCTS,EQUIP,SERVICES
USJUTU FORESTS HAVE ESTABLISHED A REQUIREMENT FOR CANADIAN SKIDDERS.

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

1. FOREST PRODUCTS,EQUIP,SERVICES

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: PRETORIA

Market: LESOTHO

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: ANIMAL,POULTRY BREEDING STOCK

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:

- Market prospects have not been adequately explored

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: PRÉTORIA

Market: LESOTHO

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: TELECOM, DATACOM, SAT, SPACECOM

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	0.00 \$M	5.00 \$M	5.00 \$M	10.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.00 \$M	9.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	90.00 %

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

Major Competing Countries

Market Share

FRANCE	10.00 %
GERMANY WEST	25.00 %
JAPAN	25.00 %

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

Products/services for which there are good market prospects:

1. RURAL TELECOM SYSTEM

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:

- Market prospects have not been adequately explored

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: PRETORIA

Market: LESOTHO

Sector : POWER & ENERGY EQUIP. & SERV.

Sub-Sector: HYDRO

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

Major Competing Countries	Market Share
EUROPEAN COMMON MARKET C	50.00 %

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

Products/services for which there are good market prospects:

1. DEV.OF HYDRO COMP OF LESOTHO SCHEME IS TO PROCEED
2. SOLAR PANELS REQUIRED FOR RURAL TELEPHONE SYSTEM

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:

- 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: ENTIRE HYDRO COMPONENT HIGHLANDS WATER SCHEME

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PRETORIA

Market: LESOTHO

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 WILL CONTINUE TO EXPLORE OPPORTUNITIES IN THIS SECT.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: PRETORIA

Market: LESOTHO

Sector : CONSTRUCTION INDUSTRY

Sub-Sector: ARCHITECT, CONS, CONSUL, SERV

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	0.00 \$M	5.00 \$M	4.00 \$M	4.00 \$M
Canadian Exports	0.00 \$M	4.00 \$M	3.00 \$M	3.00 \$M
Canadian Share of Market	0.00 %	80.00 %	75.00 %	75.00 %

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

Major Competing Countries	Market Share
UNITED KINGDOM	10.00 %
FRANCE	5.00 %
GERMANY WEST	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. TECHN.ASSIST TO LESOTHO HIGHLANDS WATER AUTHORITY
2. L.H.D.A. CONSULTANCY SERVICES
3. MASERU WATER SUPPLY PROJECT MANAGEMENT
4. MASERU SEWAGE SCHEME CONSULTANCY

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

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: PRETORIA

Market: SWAZILAND

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: RAIL

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	0.00 \$M	0.00 \$M	0.00 \$M	25.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.00 \$M	0.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	100.00 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	100.00 %

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

Products/services for which there are good market prospects:

1. G.M. LOCOMOTIVES
2. RAILWAY CONSULTING

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:

- Market prospects have not been adequately explored

29/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTDR/SUB-SECTDR HIGHLIGHTS

Mission: PRETORIA

Market: SWAZILAND

Sector : FOREST PRODUCTS, EQUIP, SERVICES

Sub-Sector: EQUIPMENT AND MACHINERY

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	2.00 \$M	2.00 \$M	2.00 \$M	3.00 \$M
Canadian Exports	0.00 \$M	0.20 \$M	0.30 \$M	0.50 \$M
Canadian Share of Market	0.00 %	10.00 %	15.00 %	16.00 %

Major Competing Countries

Market Share

SOUTH AFRICA

60.00 %

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

Products/services for which there are good market prospects:

1. SKIDDERS

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:

- Import duties are high

