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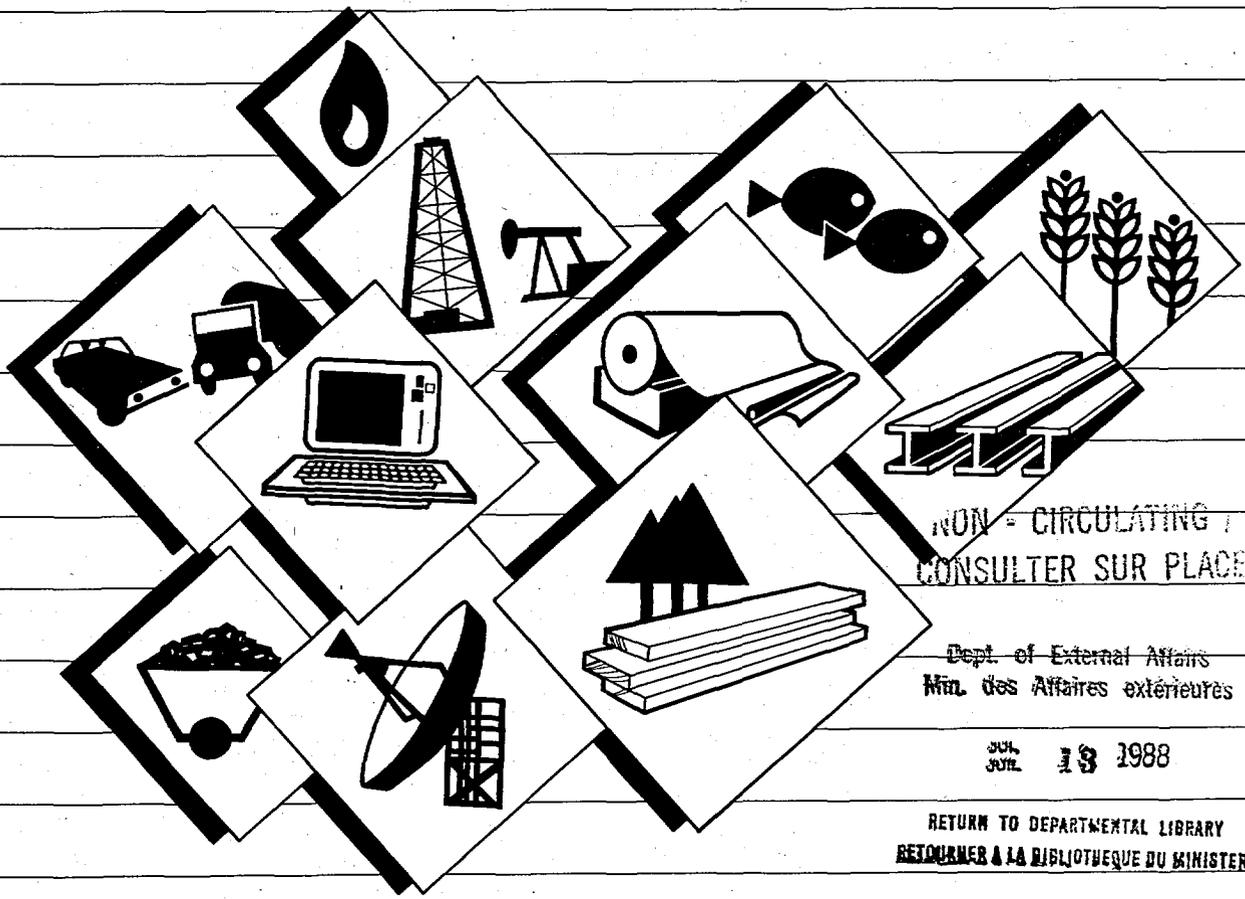
External Affairs
Canada

Affaires extérieures
Canada

DRAFT
GEOGRAPHICAL SYNOPSIS
FOR CONSULTATION PURPOSES ONLY

MIDDLE EAST

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



NON - CIRCULATING /
CONSULTER SUR PLACE

Dept. of External Affairs
Min. des Affaires extérieures

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

REPT: SYN-GEO 88/89 List of missions/market covered in the following report

MISSIONS

DAMASCUS
AMMAN
CAIRO
TEL AVIV
BAGHDAD
RIYADH
KUWAIT

MARKETS

SYRIA
JORDAN
ARAB REPUBLIC OF EGYPT
ISRAEL
IRAQ
SAUDI ARABIA
KUWAIT

Export and Investment Promotion Planning System

88/89 Trade and Economic Overview

Mission: 319 DAMASCUS

Country: 325 SYRIA

COMMERCIAL COVERAGE OF THE SYRIAN & LEBANESE MARKETS WILL FOCUS LARGELY ON IMPROVED MARKET PENETRATION PROSPECTS FOR CDN EXPORTERS IN INCREASINGLY MORE DIFFICULT TRADING ENVIRONMENTS. WHILE VISITS TO SYRIA BY AMMAN-BASED COMMERCIAL STAFF WILL CONTINUE ON A REGULAR BASIS ECONOMIC CIRCUMSTANCES IN SYRIA REMAIN DIFFICULT & NEW PROMOTIONAL INITIATIVES WILL REQUIRE EXTENSIVE RESEARCH & BACKGROUND WORK IN ORDER THAT VIABLE PROSPECTS BE IDENTIFIED. IN THE CASE OF LEBANON IMPROVED EXPORT PERFORMANCE BY CDN FIRMS WARRANTS RENEWED PROMOTIONAL EFFORTS ON THE PART OF COMMERCIAL REPRESENTATIVES. NO ACTIVE PROMOTIONAL EFFORTS HAVE BEEN UNDERTAKEN SINCE THE CLOSURE OF THE EMBASSY IN BEIRUT IN 85 & WE WOULD PROPOSE TO INITIATE A LIMITED PROGRAM OF MARKET CONTACTS & VISITS WITHIN FY 88/89. DESPITE DIFFICULT ECONOMIC CIRCUMSTANCES THE SYRIAN MARKET CONTINUES TO HOLD SUBSTANTIAL LONG TERM POTENTIAL FOR CDN GOODS & SERVICES. THE PAUCITY OF HARD-CURRENCY MAKES CASH SALES AN UNREALISTIC POSSIBILITY OVER THE SHORT TERM WITH MAJOR CAPITAL PROJECTS REQUIRING EXTERNAL FINANCING IN ORDER THAT THEY MAY BE DEVELOPED. THE ABSENCE OF EDC CORPORATE ACCOUNT COVERAGE IN SYRIA WILL BE A DEPRESSING FACTOR IN POTENTIAL SALES BY CDN FIRMS. IT IS HOPED THAT A RELAXATION OF IMPORT RESTRICTIONS UPON PRIVATE SECTOR BUYERS; A RETURN TO ESTABLISHED QUOTA PRACTICES AT THE DAMASCUS FAIR & POSSIBLE NEW CREDITS FROM ULTILATERAL FINANCING AGENCIES (EG IBRD) WILL RESULT IN AN IMPROVED IMPORT ENVIRONMENT FOR FOREIGN GOODS & SERVICES. IN TERMS OF SECTORAL CONCENTRATION EFFORTS WILL CONTINUE TO FOCUS ON THE FOLLOWING AREAS OF CANADIAN EXPERTISE: AGRICULTURE & FOOD PRODUCTS OIL & GAS DEVELOPMENT TELECOMMUNICATIONS & INFORMATICS PULP & PAPER & NON-LUXURY CONSUMER PRODUCTS SUCH AS TEXTILES & PHARMACEUTICALS. WE EXPECT THAT OVER THE LONGER TERM THE COMPUTER & INFORMATICS SECTOR WILL SEE SUBSTANTIAL GROWTH IN SYRIA BASED UPON THE REQUIREMENTS FOR DATA NETWORK TECHNOLOGY IN BOTH THE PUBLIC & PRIVATE SECTOR. SYRIAN DEVELOPMENT OF HYDROCARBON RESOURCES PARTICULARLY NATURAL GAS OFFERS LARGE SCOPE FOR CANADIAN PRODUCTS & SERVICES WITH MUCH HANGING UPON A FAVOURABLE RESOLUTION IN RESPECT OF CANADIAN PARTICIPATION IN THE THAYYEM GAS TREATMENT PROJECT. SHOULD THIS MOVE AHEAD WITH A CDN CONTRACTOR SUBSTANTIVE CDN PARTICIPATION IN SYRIAN GAS DEVELOPMENT WILL RESULT. IMPROVED ECONOMIC CIRCUMSTANCES & CREDIT WORTHINESS FOR SYRIA COULD ALSO SIGNAL POTENTIAL SALES OF CDN WHEAT & CEREAL GRAINS TO THE MARKET WHICH WERE A MAINSTAY OF BILATERAL TRADE IN THE PERIOD PRECEEDING THE MID-80S. PROCUREMENT BY SYRIAN STATE ENTERPRISES OF ESSENTIAL RAW MATERIALS SUCH AS FOOD PRODUCTS (INCLUDING OILSEEDS) CHEMICALS PAPER PRODUCTS & CONSTRUCTION MATERIALS WILL CONTINUE TO ATTRACT INTEREST FROM CDN TRADING ESTABLISHMENTS & THESE EFFORTS WILL BE SUPPORTED TO THE GREATEST EXTENT POSSIBLE BY POST PERSONNEL. THE DAMASCUS INT'L FAIR WILL

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 319 DAMASCUS

Market: 325 SYRIA

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

1. 011 OIL & GAS EQUIPMENT, SERVICES

REASONS: EXTENT OF SYRIAN NATURAL GAS RESERVES & REQUIREMENT FOR EFFECTIVE TECHNOLOGICAL SOLUTIONS TO BRING FIELDS INTO PRODUCTION OVER AS SHORT A TERM AS POSSIBLE OFFER ATTRACTIVE MARKET PROSPECTS FOR CDN FIRMS.

2. 001 AGRI & FOOD PRODUCTS & SERVICE

REASONS: EMERGENCE OF MIXED PUBLIC/PRIVATE SECTOR AG FIRMS OFFER PROSPECTS FOR FARM MANAGEMENT OF JOINT VENTURE AGREEMENTS WITH CDN COUNTERPARTS. EMPHASIS UPON CEREAL GRAINS PROD. & CATTLE BREEDING FIT WELL WITH CDN

3. 005 COMM. & INFORM. EQP. & SERV

REASONS: EXPANSION & IMPROVEMENT OF TELECOM AND DATACOM SERVICE WITHIN BOTH GOV'T & PRIV. SECTOR ARE AN INCREASING PRIORITY IN SYRIA'S LONGER TERM DEVELOPMENT. THIS WILL BE HIGH GROWTH SECTOR ONCE OVERALL ECONOMIC

4. 009 FOREST PRODUCTS, EQUIP, SERVICES

REASONS: CONTINUED EXTERNAL PROCUREMENT BY SYRIA OF NEWSPRINT & FINE PAPER REQUIREMENTS OFFERS SCOPE FOR ENHANCED CDN EXPORTS TO MKT. PULP MILLS IN SYRIA OFFER LONG TERM POTEN. FOR EQUIP. & SPEC. SERVICES IF EXTERNAL

5. 013 CONSUMER PRODUCTS

REASONS: REQUIREMENT FOR CONTINUED PROCUREMENT OF BASIC COMMODITIES SUCH AS FOOD PRODUCTS PHARMACEUTICALS VETERINARY PRODUCTS CHEMICALS & OTHER RAW MATERIALS WILL CONTINUE TO DRAW ATTENTION OF LOCAL AGENTS OF CDN

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

1. 001 AGRI & FOOD PRODUCTS & SERVICE
2. 011 OIL & GAS EQUIPMENT, SERVICES
3. 005 COMM. & INFORM. EQP. & SERV
4. 009 FOREST PRODUCTS, EQUIP, SERVICES
5. 013 CONSUMER PRODUCTS

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 319 DAMASCUS

Market: 325 SYRIA

Sector: 001 AGRI & FOOD PRODUCTS & SERVICE

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	200.00M	\$ 200.00M	\$ 250.00M	\$ 400.00M
Canadian Exports \$	5.00M	\$ 2.00M	\$ 6.60M	\$ 20.00M
Canadian Share of Import Market	4.00%	1.00%	3.00%	5.00%

Major Competing Countries

Market Share

i) 620 EUROPE	060 %
ii) 611 MIDDLE EAST OR NEAR EAST	030 %

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

Current status of Canadian exports: Market share declining

Products/services for which there are
good market prospects

Current Total Imports

i) AGRIC EQUIPMENT AND SERVICES	In Canadian \$	\$ 2.00 M
ii) FOOD PRODUCTS	\$	50.00 M
iii) INCLUDES GRAINS AND OILSEEDS.	\$	0.00 M

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

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

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- non competitive financing from Canada
- other factor(s) described by the Trade Office as follows:

HIGH TRANSPORTATION COSTS FOR CDN PRODUCTS VIS-A-VIS EUROPEAN SUPPLIERS HAVE BEEN MITIGATING CIRCUMSTANCE IN MARKET PENETRATION EFFORTS. SUBSIDIZATION POLICIES & LACK OF AVAILABLE FINANCING MECHANISMS HAVE FURTHER REDUCED MARKET PROSPECTS FOR CDN PRODUCTS.

Export and Investment Promotion Planning System

MISSION: 319 DAMASCUS

COUNTRY: 325 SYRIA

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

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

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

Activity: ENHANCED PROMOTIONAL EFFORTS WITH GOVT REGISTERED "MIXED AGRICULTURAL COMPANIES" TO EXPLORE POSSIBLE INTEREST IN CDN PRODUCTS AND SERVICES FOR FARM DEVELOPMENT PROJECTS.

Results Expected: INITIAL CONSULTANCY CONTRACT BY CDN FIRM FOR FARM MANAGEMENT; POSSIBLE IMPORTS OF CDN DAIRY CATTLE BY ONE FIRM.

Activity: FOLLOW-UP TO SYRIAN PARTICIPATION AT WESTERN CANADA FARM PROGRESS SHOW IN JUNE 87. ASSESSMENT OF TRIALS PROGRAM FOR CDN FARM IMPLEMENTS WITH GEN ORG. FOR AGRIC MERCHANIZATION.

Results Expected: POSSIBLE CONSIGNMENT OF CDN ROCKPICKERS OR OTHER SPECIALIZED IMPLEMENTS FOR TRIALS PROGRAM WITH G. O. A. M.

Activity: SUPPORT EFFORTS OF LOCAL AGENTS FOR CDN FOOD PRODUCTS EXPORTERS IN ANTICIPATION OF EASING OF IMPORT RESTRICTIONS PLACED UPON PRIVATE SECTOR SYRIAN IMPORTERS.

Results Expected: RETURN TO PREVIOUS SALES LEVEL (EG 500K TO \$1M) OF CDN FOLLD PRODUCTS IN MARKET.

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

Activity: POTENTIAL INTRODUCTION OF CDN SEED POTATO VARIETIES WITH THE GENERAL ORGANIZATION FOR SEED MULTIPLICATION (GOMS) IN ALEPPO.

Results Expected: AFTER TRIALS PROGRAM, INCLUSION OF CDN VARIETIES IN GOSM CALLS FOR TENDER BY FOREIGN SEED POTATO SUPPLIERS. BASIS FOR PENETRATION OF "DUTCH" MARKET.

Export and Investment Promotion Planning System

MISSION: 319 DAMASCUS

COUNTRY: 325 SYRIA

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

Activity: FOCUS FOOD PRODUCTS PROMOTIONAL EFFORTS ON STATE PURCHASING AGENCIES SUCH AS GEZA WITH EMPHASIS ON RAW MATERIALS, OILSEED PRODUCTS (CANOLA) AND CEREAL GRAINS.

Results Expected: INITIAL TRIAL ORDERS FOR CDN PRODUCTS BY GEZA THROUGH SUCCESSFUL TENDER PARTICIPATION BY CDN EXPORTERS.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 319 DAMASCUS

Market: 325 SYRIA

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

Subsector: 053 TELECOMMUNICATIONS (INC SPACE)

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	15.00M	\$ 15.00M	\$ 5.00M	\$ 4.00M
Canadian Exports \$	300.00M	\$ 150.00M	\$ 250.00M	\$ 350.00M
Canadian Share of Import Market	3.00%	1.20%	5.00%	8.70%

Major Competing Countries

Market Share

- i) 605 ASIA OR FAR EAST
- ii) 608 WEST EUROPE

025 %
040 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

- i) SWITCHING PRODUCTS
- ii) PERIPHERALS AND OTHER HARDWARE
- iii) TELEPHONE EQUIPMENT

In Canadian \$
\$ 5.00 M
\$ 1.00 M
\$ 1.00 M

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

- there are import restrictions which can present significant problems
- exports of certain products or services to this country are subject to Canadian export controls
- the degree of import duty protection of local industry tends to be low

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

- non competitive financing from Canada
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- difficulties in obtaining credit facilities in Canada
- other factor(s) described by the Trade Office as follows:

PAUCITY OF FOREIGN EXCHANGE AND EXTERNAL FINANCING IN SECTOR DOMINATED BY GOVERNMENT PROCEDUREMENT HAS BEEN POSTPONEMENT OF MAJOR TELECOM PROJECTS. COMPUTER USE CONFINED TO WEALTHY FOR TIME-BEING , WITH FEW COMMERCIAL PROSPECTS, IMPROVED ECONOMIC CONDITIONS/

Export and Investment Promotion Planning System

MISSION: 319 DAMASCUS

COUNTRY: 325 SYRIA

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

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

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

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

Activity: DECISION BY SYRIAN TELECOMMUNICATIONS ESTABLISHMENT (STE) REGARDING PROCUREMENT OF SWITCHING AND PABX TECHNOLOGY DUE TO UNAVAILABILITY OF EXTERNAL FINANCING.

Results Expected: POTENTIAL CONTRACT AWARD FOR TWO PROJECTS TO NORTHERN TELECOM IF FINANCING COULDBE PUT IN PLACE.

Activity: ON GOING ASSISTANCE TO CDN FIRMS SUCH AS MARMAH MICROSYSTEMS, ALIS AND GANDALF IN MARKETING EFFORTS TO KEY PUBLIC SECTOR AGENCIES IN SYRIA.

Results Expected: ENHANCED MARKET PENETRATION BY CDN SUPPLIERS OF COMPUTER HARDWARE AND SOFTWARE SYSTEMS.

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

Activity: ASSESSEMENT OF PRIVATE SECTOR CAPABILITY IN COMPUTER FIELD (PRESENTLY CONFINED TO ENTERTAINEMENT APPLICATIONS) IN ORDER TO IDENTIFY POTENTIAL LOCAL AGENTS FOR CDN SUPPLIERS.

Results Expected: POTENTIAL BASIS FOR RECRUITEMENT OF PARTICIPANTS FOR INCOMING COMPUTER TECH MISSION TO CDA.

Export and Investment Promotion Planning System

MISSION: 319 DAMASCUS

COUNTRY: 325 SYRIA

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

Activity: TO WORK CLOSELY WITH NORTHERN TELECOMM TO UNDERTAKE VISIT TO CDA BY DIRECTOR GENERAL OF STE FOR DISCUSSIONS WITH INDUSTRY AND GOVT CONCERNING SWITCHING AND PABX PROJECTS.

Results Expected: POTENTIAL AVAILABILITY OF CREDIT FACILITIES TO STE IN ORDER THAT INITIAL EQUIP PROCUREME-NT CAN BE UNDERTAKEN.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 319 DAMASCUS

Market: 325 SYRIA

Sector: 009 FOREST PRODUCTS, EQUIP, SERVICES

Subsector: 094 PULP AND PAPER PRODUCTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	20.00M	\$ 20.00M	\$ 20.00M	\$ 30.00M
Canadian Exports \$	750.00M	\$ 500.00M	\$ 150.00M	\$10000.00M
Canadian Share of Import Market	3.00%	2.50%	7.00%	0.00%

Major Competing Countries

Market Share

i) 608 WEST EUROPE

060 %

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

5-15 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are
good market prospects

Current Total Imports

i) FINE PAPER
ii) CONSULTING SERVICES
iii) ENVIRONMENTAL CONTROL EQUIPMENT AND SERVICE

In Canadian \$
\$ 1.00 M
\$ 0.00 M
\$ 0.00 M

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

- there are import restrictions which can present significant problems

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

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

STATE CONTROL OF PROCUREMENT OF PAPER; PULP PRODUCTION AND FORESTRY MANAGEMENT HAS SEEN SECTOR DETERIORATE SUBSTANTIALLY IN THE RECENT ECONOMIC DECLINE IN SYRIA. COUNTRY HAS SIGNIFICANT POTENTIAL IN THIS SECTOR, WHERE CDN EXPERTISE IS WELL KNOWN & REPUTABLE

Export and Investment Promotion Planning System

MISSION: 319 DAMASCUS

COUNTRY: 325 SYRIA

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

- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- strong sectoral capability in Canada

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

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

Activity: INTRODUCTION OF CDN EXPERTISE TO SYRIAN AUTHORITIES IN CONTROL OF EFFLUENTS FROM PULP PRODUCTION FACILITIES.

Results Expected: POTENTIAL CONSULTANCY CONTRACT FOR CDN FIRM IF FINANCING CAN BE FOUND.

Activity: ASSESSMENT OF SYRIAN PROCUREMENT FOR FINE PAPER AND NEWSPRINT FOR LOCAL INDUSTRIES.

Results Expected: CONTINUED PENETRATION BY EXPORTERS SUCH AS UNI-PAPER AND IBMC IN MONTREAL N GEZA TENDERS

Activity: ASSESSEMENT OF LONGER TERM REQUIREMENTS BY SYRIAN PULP PRODUCTION FACILITIES FOR UPGRADING OR EXPANSION OF EXISTING FACILITIES.

Results Expected: IDENTIFICATION OF LONGER TERM PROJECT OPPORTUNITIES FOR CDN PULP AND PAPER EQUIP AND EXPERTISE. EXTERNAL FINANCING REQUIRED.

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

Activity: VISITS TO EXISTING PULP FACILITIES IN NORTH OF SYRIA IN ORDER TO DETERMINE LONG TERM PRIORITIES.

Results Expected: ESTABLISHMENT OF CONTACT WITH PROCUREMENT OFFICIALS OF STATE ENTERPRISES FOR PULP AND PAPER PRODUCTION.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 319 DAMASCUS

Market: 325 SYRIA

Sector: 011 OIL & GAS EQUIPMENT, SERVICES

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	50.00M	\$ 50.00M	\$ 20.00M	\$ 38.00M
Canadian Exports \$	5.00M	\$ 20.00M	\$ 370.00M	\$ 350.00M
Canadian Share of Import Market	10.00%	30.00%	0.02%	0.09%

Major Competing Countries

Market Share

i) 607 COMECON	040 %
ii) 577 UNITED STATES OF AMERICA	015 %
iii) 608 WEST EUROPE	015 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) GAS EXPLORATION AND PRODUCTION EQUIPMENT.	\$ 20.00 M
ii) DRILLING EQUIPMENT	\$ 5.00 M
iii) CONSULTING SERVICES	\$ 0.00 M

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

i) Project Name: TRIASSIC GAS DEVELOPMENT PROJECT:
PHASE II AND III

Approximate Value: \$ 40 M
Financing Source: 024 BC
For further info. please contact:
COMM. DIV. CDN EMB. TLX: 23080 CANAD JO

ii) Project Name: DEVELOPMENT OF SOUKHNEH, BISHRHI
AND NAJEEB GAS FIELD.

Approximate Value: \$ 200 M
Financing Source: 024 BC
For further info. please contact:
MIDDLE EAST TRADE DEV. DIV. (GMT) DEPT EXT. AFF. OTTAWA

Export and Investment Promotion Planning System

MISSION: 319 DAMASCUS

COUNTRY: 325 SYRIA

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

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

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

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters
- other factor(s) described by the Trade Office as follows:

LACK OF AVAILABLE EXTERNAL FINANCING HAS FORCED SUSPENSION OF NUMBER OF PROJECTS. PAYMENT DIFFICULTIES IN PROJECTS UNDER EXECUTION MAKES NEW FIRMS HESITANT OF MARKET INVOLVEMENT. NEW REG'S REDUCING FOREIGN CURRENCY COMPONENTS OF MAJOR PROJECTS IS FUTURE DETEREENT

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

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

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

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

Activity: FINALIZATION OF CONTRACT WARD TO CDN FIRM FOR GAS TREATMENT PLANT REQUIRED FOR THAYEM GAS FIELD IN NORTHEAST OF SYRIA.

Results Expected: CDN PARTICIPATION IN THAYEM PROJECT SHOULD TRIGGER EXTENSIVE MARKET PENETRATION BY CDN FIRMS IN THIS SECTOR.

Activity: CONFIRMATION OF CANADIAN OCCIDENTAL PETROLEUM EXPLORATION ACTIVITY IN MARKET. BLOCK UNDER CONSIDERATION IN THE SOUTH OF SYRIA NEAR THE JORDAN BORDER.

Results Expected: MARKET PRESENCE BY CDN EXPLORATION FIRM SHOULD RESULT IN COMMERCIAL SPINOFF FOR CDN SERVICE FIRMS IN SEISMIC AND DRILLING ACTIVITIES.

Export and Investment Promotion Planning System

MISSION: 319 DAMASCUS

COUNTRY: 325 SYRIA

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

Activity: RENEWED VISITS TO MARKETS BY REPS OF CDN OILFIELD EQUIPMENT MANUFACTURERS AND SOLIDIFICATION OF RELATIONSHIPS WITH LOCAL AGENTS.

Results Expected: ENHANCED PARTICIPATION BY CDN FIRMS IN ON-GOING EQUIPMENT TENDERS ISSUED BY SPC AND AL-FURAT CO.

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

Activity: ASSESSEMENT OF NEW SYRIAN GAS FIELDS WHICH ARE EXPECTED TO BE BROUGHT INTO PRODUCTION IN THE 1988-90 PERIOD.

Results Expected: EXPANDED SCOPE OF FOR PROCUREMENT OF CDN PRODUCTS AND TECHNOLOGY TO BRING GAS WELLS INTO ACTIVE USE.

Activity: ANALYSIS OF REQUIREMENTS OF HOMS AND BANIAS REINERIES IN TERMS OF UPGRADING AND/OR EXPANSION OF EXISTING FACILITIES.

Results Expected: IDENTIFICATION OF LONGER TERM PROJECTS IN DOWNSTREAM OIL AND GAS ACTIVITIES. EXTERNAL FINANCING WILL BE ESSENTIAL.

Activity: PARTICIPATION BY SYRIAN OFFICIALS IN 1988 NPS IN CALGARY.

Results Expected: IDENTIFICATION OF NEW AREAS IN OIL AND GAS SECTOR WHERE CDN EXPERTISE MAY BE APPROPRIATE (EG. OIL SHALE).

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 319 DAMASCUS

Market: 325 SYRIA

Sector: 013 CONSUMER PRODUCTS

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	20.00M	\$ 20.00M	\$ 60.00M	\$ 97.00M
Canadian Exports \$	100.00M	\$ 100.00M	\$ 180.00M	\$ 500.00M
Canadian Share of Import Market	0.50%	0.40%	0.30%	0.50%

Major Competing Countries

Market Share

i) 620 EUROPE	030 %
ii) 607 COMECON	020 %
iii) 605 ASIA OR FAR EAST	015 %
iv) 227 CYPRUS	005 %

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

Current status of Canadian exports: Market share declining

Products/services for which there are good market prospects

Current Total Imports In Canadian \$

i) TEXTILES	\$ 750.00 M
ii) TOOLS AND HARDWARE	\$ 250.00 M
iii) MEDICAL PRODUCTS	\$ 10.00 M

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

- there are import restrictions which can present significant problems
- approval of technical standards can present problems in the case of some imported products

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

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- high tariffs
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters
- other factor(s) described by the Trade Office as follows:

CONSTRUCTION OF PRIVATE SECTOR IMPORTS THROUGH PROHIBITION OR REDUCTION IN QUOTA ALLOCATIONS HAVE IMPACTED SEVERAL IN CDN SALES IN MARKET. LACK OF HARD CURRENCY AND DECLINING DOMESTIC SALES PROSPECTS HAVE FURTHER DENIED PROCUREMENT OF PRODUCTS FROM ABROAD

Export and Investment Promotion Planning System

MISSION: 319 DAMASCUS

COUNTRY: 325 SYRIA

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

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

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

Activity: ON-GOING PROMOTION OF CDN CONSUMER PRODUCTS (WITH FOCUS UPON TEXTILES AND HARDWARE) AT DAMASCUS INTERNATIONAL FAIRS.

Results Expected: RELAXATION OF IMPORT QUOTA RESTRICTIONS TO PRIVATE SECTOR BUYERS; IMPROVED SALES OF TRADITIONAL CDN CONSUMER PRODUCTS EXPORTS TO THE MARKET.

Activity: CERTIFICATION BY SYRIAN STATE ENTERPRISES RESPONSIBLE FOR PROCUREMENT OF PHARMACEUTICAL AND BIOLOGICAL PRODUCTS OF CDN MANUFACTURED VACCINATION AND ANIMAL PHARMACEUTICAL PRODUCTS.

Results Expected: EXPANDED MARKET POTENTIAL FOR CDN FIRMS SUCH AS PVU AND CONNAUGHT LABS IN TENDERS ISSUED BY PHARMEX.

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

Activity: ASSISTANCE TO MAYSIA IMPORT-EXPORT OF MONTREAL IN EFFORTS TO INTEREST GOVERNMENT TEXTILE MILLS IN SYRIA TO ASSESS CDN PRODUCED CLOTH.

Results Expected: POTENTIAL PUBLIC SECTOR SALES BY MAYSIA OF PRODUCTS WHICH THEY REPRESENT IN THE REGION.

Activity: IF QUOTA RESTRICTIONS LIFTED, RENEWED PROMOTIONAL EFFORTS ON BEHALF OF CDN TRADING HOUSES INTERESTED IN EXPORTS OF MAJOR APPLIANCES AND FURNITURE.

Results Expected: RENEWED PROCUREMENT BY SYRIAN PRIVATE SECTOR BUYERS OF TRADITIONAL CDN CONSUMER PRODUCTS SUCH AS KITCHEN APPLIANCES AND AIR CONDITIONING UNITS.

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional Projects approved and planned for the coming fiscal year.		
Mission: 319 DAMASCUS		
Sector: 001 AGRI & FOOD PRODUCTS & SERVICE		
020 MISSION OUTGOING		
AGRICULTURAL EQUIPMENT MISSION	DAMASCUS	0389
DAIRY SEMINARS (AG CANADA)	DAMASCUS	1088
Sector: 011 OIL & GAS EQUIPMENT, SERVICES		
024 MISSION INCOMING		
INCOMING OIL & GAS MISSION		1188
Sector: 999 MULTIPLE SECTORS		
010 FAIRS		
35TH DAMASCUS INT'L FAIR	DAMASCUS	0888
Type of Event	Location	Date

Promotional projects proposed for the two following fiscal years.

Mission: 319 DAMASCUS		
Sector: 001 AGRI & FOOD PRODUCTS & SERVICE		
020 MISSION OUTGOING		
FOOD PROCESSING TECHNOLOGY MISSION	DAMASCUS	0689
Sector: 005 COMM. & INFORM. EQP. & SERV		
024 MISSION INCOMING		
INCOMING COMPUTER TECHNOLOGY MISSION		0090
Sector: 999 MULTIPLE SECTORS		
010 FAIRS		
37TH DAMASCUS INTERNATIONAL FAIR	DAMASCUS	0890
36TH DAMASCUS INT'L FAIR	DAMASCUS	0889

Export and Investment Promotion Planning System

88/89 Trade and Economic Overview

Mission: 340 AMMAN

Country: 308 JORDAN

TRADE & INVESTMENT PROMOTION EFFORTS IN JORDAN FOR FY 88/89 WILL BE DIRECTED AT MAINTAINING MOMENTUM GENERATED BY CDN FIRMS IN PRINCIPAL SECTORS OF CONCENTRATION AS WELL AS BUILDING UPON COMMERCIAL SPINOFFS RESULTING FROM CDA'S BILATERAL DEVELOPMENT ASSISTANCE & PCIAAC PROGRAMS IN THE KINGDOM. AS IN PREVIOUS YEARS COMMERCIAL DIV. EFFORTS WILL BE DIVIDED INTO TWO PARTS: PUBLIC SECTOR OPPORTUNITIES & SALES TO PRIV. SECTOR ENTERPRISES. IN BOTH INSTANCES CDN MKT PENETRATION EFFORTS WILL REQUIRE ACTIVE SUPPORT OF EXPORT FINANCING MECHANISMS IN ORDER THAT PURCHASES FROM CDA BE FACILITATED & THIS WILL INCREASINGLY REQUIRE CONCESSIONARY FINANCING IN LIGHT OF COMPETITOR ACTIVITY IN THE MKT. PRICE SENSITIVITY WILL CONTINUE TO BE THE PROVINCIAL CRITERION APPLIED BY JORDANIAN BUYERS TO FOREIGN PURCHASING DECISIONS WHICH ARE CHARACTERISTIC OF THE HIGHLY COMPETITIVE NATURE OF THE LOCAL MARKET. MAJOR CAPITAL PROJECT OPPORTUNITIES WILL LIKELY BE REDUCED AS A RESULT OF GOV'T BUDGET ADJUSTMENTS TO THE 5-YR DEVELOPMENT PLAN (86-90). SECTORS WHERE CDN FIRMS ARE PRESENTLY PROVIDING FRONT-END PROJECT DEVELOPMENT EXPERTISE OR CONSULTING SERVICES MAY HAVE BROAD SCOPE FOR MEDIUM TERM IMPLEMENTATION IF CDN FINANCING SUPPORT CAN BE ASSURED FOR SUCH PROJECTS THROUGH THE EXPORT DEV. CORP. (EDC) AND/OR CIDA. THE POST WILL CONTINUE TO DIRECT EXPORTERS TO THE INDUSTRIAL COOPERATION PROGRAM (INC) OF CIDA IN RESPECT OF LOCAL REQUIREMENTS FOR FEASIBILITY & ASSESSMENT OF POTENTIAL HIGH TECHNOLOGY APPLICATIONS IN THE KINGDOM. JOINT VENTURES AND/OR TECHNOLOGY TRANSFERS FROM ABROAD WILL CONTINUE TO BE A HIGH PRIORITY OF THE JORDANIAN GOV'T AND ARE AN ESSENTIAL FOLLOW-UP ELEMENT BY THE POST TO THE COMMITMENTS MADE BY CDA DURING THE VISIT OF PRINCE HASSAN TO OTT. THE PROPOSED HIGH-LEVEL TECHNOLOGY & INVESTMENT MISSION FROM CDA TO JORDAN IN APR. 88 WILL BE THE CENTREPIECE OF THIS STRATEGY. TRADE DEVELOPMENT & PROMOTIONAL ACTIVITIES WILL CONTINUE TO BE DIRECTED AT 5 PRINCIPAL SECTORS OF CONCENTRATION: OIL & GAS TELECOMMUNICATIONS AGRICULTURE & FOOD PRODUCTS POWER & ENERGY & TRANSPORTATION. THESE SECTORS PARALLEL THE MAJOR THRUST OF CDA'S BILATERAL DEV. PROGRAM IN THE KINGDOM WITH THE HOPE THAT VIABLE COM. SPINOFFS WILL RESULT FROM INITIAL AID PROJECTS. SPECIAL EMPHASIS WILL BE GIVEN IN THE COMING FY TO THE TELECOMMUNICATIONS SECTOR WHERE PARTIAL PRIVATIZATION OF THE TCC & WORLD BANK-FUNDED PROCUREMENT OFFER EXTENSIVE SCOPE TO CDN EXPORTERS. THE DISCOVERY OF COMMERCIALY VIABLE RESERVES OF NATURAL GAS SHOULD RESULT IN ADDITIONAL CANADIAN EXPERTISE & PRODUCTS BEING SOURCED BY JORDANIAN AGENCIES TASKED WITH EXPLOITATION OF THIS RESOURCE & ADDITIONAL OPPORTUNITIES SHOULD ALSO EMERGE IN OTHER INDIGENOUS HYDROCARBON FUELS SUCH AS OIL SHALE & TAR SANDS. IN VIEW OF CDAS INCREASINGLY IMPORTANT ROLE IN JORDANS HYDROCARBON EXPLORATION ACTIVITIES WE WILL BE EXAMINING THE PROSPECTS FOR INVITING THE MIN. OF ENERGY TO VISIT CDA EARLY IN THE

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 340 AMMAN

Market: 308 JORDAN

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

1. 011 OIL & GAS EQUIPMENT, SERVICES

REASONS: JORDAN'S COMMITMENT TO EXPLOITATION OF INDIGENOUS HYDROCARBON RESOURCES IS HIGH PRIORITY IN NATIONAL DEVELOPMENT. ENTRY INTO MARKET OF PCIAAC & WESTBURNE DRILLING HAVE ESTABLISHED SOLID CDN PROFILE IN THIS

2. 005 COMM. & INFORM. EQP. & SERV

REASONS: SUCCESSFUL INTRO OF CDN TELECOM EXPERTISE BY NORTHERN TELECOM SHOULD AFFORD OPPORTUNITY FOR EXPANDED PRESENCE BY CANADIAN FIRMS IN MKT. ANTICIPATED PARTIAL PRIVATIZATION OF TCC & PROCUREMENT OF SWITCHING

3. 003 GRAINS AND OILSEEDS

REASONS: INCREASING MKT INTEREST IN RAPESEED OIL (CANOLA) OFFERS EXCELLENT SCOPE FOR INCREMENTAL SALES IN MKT. ONGOING PROCUREMENT BY JORDAN OF BARLEY WHEAT FLOUR & CANARY SEED SHOULD EXPAND THE MARKET SHARE OF

4. 007 POWER & ENERGY EQUIP. & SERV.

REASONS: BUILDING UPON THE INTRODUCTION OF CDN PRODUCTS & EXPERTISE THROUGH OUR AID PROGRAM CDN SUPPLIERS OF HV TRANSMISSION & MAINTENANCE EQUIPMENT SHOULD SEE EXPANDED MARKET POTENTIAL. THE USE OF INDIGENOUS FUELS

5. 014 EDUCATION, MEDICAL, HEALTH PROD

REASONS: STEADY GROWTH IN SALES BY CDN SUPPLIERS OF MEDICAL EQUIPMENT & PHARMACEUTICAL PRODUCTS SHOULD CONTINUE OVER THE SHORT TERM. PRESENCE IN AMMAN OF REGIONAL EDUCATIONAL SERVICES OFFIE (ACCC) SHOULD AFFORD

6. 001 AGRI & FOOD PRODUCTS & SERVICE

REASONS: RENEWED SEED POTATO MARKETING EFFORTS & POTENTIAL SUPPLY OF FROZEN FOOD & SPECIALTY PRODUCTS TO LOCAL SUPERMARKET OPERATIONS HOLD EXCELLENT POTENTIAL FOR CDN EXPORTERS. TT/JV PROSPECTS IN FARM MECHANIZATION

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

1. 003 GRAINS AND OILSEEDS
2. 012 PETROCHEM & CHEM PROD, EQP, SERV
3. 011 OIL & GAS EQUIPMENT, SERVICES
4. 013 CONSUMER PRODUCTS
5. 014 EDUCATION, MEDICAL, HEALTH PROD
6. 005 COMM. & INFORM. EQP. & SERV

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 340 AMMAN

Market: 308 JORDAN

Sector: 001 AGRI & FOOD PRODUCTS & SERVICE

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	300.00M	\$ 300.00M	\$ 325.00M	\$ 800.00M
Canadian Exports \$	2.00M	\$ 1.00M	\$40000.00M	\$ 200.00M
Canadian Share of Import Market	0.90%	0.30%	0.12%	0.02%

Major Competing Countries

Market Share

i) 611 MIDDLE EAST OR NEAR EAST	040 %
ii) 620 EUROPE	035 %
iii) 577 UNITED STATES OF AMERICA	010 %
iv) 605 ASIA OR FAR EAST	010 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports
In Canadian \$

i) BASIC FOOD PRODUCTS	\$ 200.00 M
ii) AGRICULTURAL EQUIP	\$ 1.00 M
iii) CONSULTING SERVICES	\$ 1.00 M

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

i) Project Name: HAMAD BASIN RURAL INTEGRATION AND AGRICULTURAL DEVELOPMENT PROJECT.

Approximate Value: \$ 10 M

Financing Source: 024 BC

For further info. please contact:

COMM. DIV. CDN EMBASSY TLX:23080 CANAD JD.

Export and Investment Promotion Planning System

MISSION: 340 AMMAN

COUNTRY: 308 JORDAN

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

- there are import restrictions which can present significant problems

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

- non competitive pricing
- other factor(s) described by the Trade Office as follows:
HIGH TRANSPORTATION COSTS VIS-A-VIS EUROPEAN SOURCES OF SUPPLY CONTINUE TO BE MITIGATING FACTOR IN SUCCESSFUL MARKET PENETRATION BY CDN FOOD PRODUCTS; ESTABLISHED RELATIONSHIPS WITH EUROPEAN SUPPLIERS OF AGRIC IMPLEMENTS & EQUIP PRESENT FORMIDABLE OBSTACLES.

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

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

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

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

Activity: FINALIZATION OF FARM MANAGEMENT AGREEMENTS BY CDN CONSULTANTS FOR MAJOR CEREAL GRAINS FARM DEVELOPMENT PROJECTS IN THE SOUTH EAST JORDAN.

Results Expected: ESTABLISHMENT OF LOCAL OFFICES BY AT LEAST TWO CDN FIRMS WHO WILL MANGE PRIVATE SECTOR FARMS IN SE. ADDITIONAL WORK IN MARKET WILL LIKELY RESULT.

Activity: RETURN TO COMMERCIAL SUPPLY/SHIPMENT BY CDN SEED POTATO EXPORTERS TO JORDANIAN PRIVATE SECTOR BUYERS; POSSIBLE PENETRATION OF JORDAN COOPERATIVES FOR CDN SEED.

Results Expected: SALES OF BETWEEN 250-600MY OF CDN SEED POTATOES TO JORDAN BY CDN EXPORTERS IN 1988/89 PERIOD.

Export and Investment Promotion Planning System

MISSION: 340 AMMAN

COUNTRY: 308 JORDAN

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

Activity: ADDITIONAL PROMOTION OF CDN SUPPLIERS TO JORDANIAN IMPORTERS AND RETAIL DISTRIBUTORS OF FOOD PRODUCTS, INCL MAJOR SUPERMARKET OPERATORS.

Results Expected: SALES OF CDN FOOD PRODUCTS TO BUYERS SUCH AS SAFEWAY JORDAN, BARG AND OTHER SUPERMARKET OPERATIONS.

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

Activity: FOLLOW-UP TO MARCH 87 AGRICULTURAL EQUIPMENT MISSION TO JORDAN AND POTENTIAL PILOT PROJECT FOR MECHANIZATION OF LENTILS HARVESTING.

Results Expected: INTRODUCTION OF CDN TILLAGE, SEEDING & HARVESTING EQUIPMENT TO JORDAN COOPERATIVES AND PRIVATE SECTOR AGENCIES.

Activity: VISITS TO CANADA BY JORDANIAN IMPORTERS OF LIVESTOCKS' DAIRY SEMINARS IN JORDAN FOR PUBLIC AND PRIVATE SECTOR IMPORTERS.

Results Expected: INTRODUCTION OF CDN BRED GOATS AND DAIRY CATTLE TO JORDANIAN BREEDERS.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 340 AMMAN

Market: 308 JORDAN

Sector: 003 GRAINS AND OILSEEDS

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	200.00M	\$ 200.00M	\$ 250.00M	\$ 250.00M
Canadian Exports \$	10.00M	\$ 5.00M	\$ 1.20M	\$ 250.00M
Canadian Share of Import Market	5.00%	3.00%	0.50%	0.10%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	040 %
ii) 608 WEST EUROPE	030 %
iii) 611 MIDDLE EAST OR NEAR EAST	010 %
iv) 605 ASIA OR FAR EAST	005 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

- i) CEREAL GRAINS & FLOUR
- ii) OILSEED BASE PRODUCTS

In Canadian \$
\$ 150.00 M
\$ 25.00 M

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

- i) Project Name: MINISTRY OF INDUSTRY AND SUPPLY TENDERS
FOR CEREAL GRAINS.

Approximate Value: \$ 150 M

Financing Source: 024 BC 025 OTHER

For further info. please contact:

THE COMM. DIV. CDN EMB. TLX: 23080 CANAD JD

Export and Investment Promotion Planning System

MISSION: 340 AMMAN

COUNTRY: 308 JORDAN

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

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

- non competitive pricing
- non competitive financing from Canada
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- other factor(s) described by the Trade Office as follows:
EXPORT SUBSIDIES BY MAJOR OR EUROPEAN AND US COMPETITORS MAKE SALES PROSPECTS FOR CEREAL GRAINS DIFFICULT. LACK OF CONSUMER KNOWLEDGE OF ALTERNATIVE OILSEED PRODUCTS SUCH AS CANOLA OIL REQUIRE EXTENSIVE MARKET EDUCATION BY CDN EXPORTERS.

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

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

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

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

Activity: FINALIZATION OF ASSESSMENTS BY LOCAL IMPORTERS OF CANOLA SAMPLES PROVIDED BY CDN EXPORTERS.

Results Expected: SUBSTANTIAL MARKET PENETRATION BY CANOLA OIL ONCE IMPORTERS AND CONSUMERS VIEW PRODUCTS AS VIABLE PRICE ALTERNATIVE TO TRADITIONAL SOYA AND CORN OILS.

Activity: ASSESSEMENT OF PARTICIPATION BY JORDANIAN CANDIDATES IN CIGI INTERNATIONAL GRAINS COURSE AT WINNIPEG IN 1988/89.

Results Expected: INTRODUCTION OF CDN TECHNOLOGY TO JORDANIAN MILLERS AND GOVT CONTROLLED BAKERIES FROM WHICH MARKET PROMOTION EFFORTS FOR GRAINS AND FLOUR CAN BE FOCUSED.

Export and Investment Promotion Planning System

MISSION: 340 AMMAN

COUNTRY: 308 JORDAN

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

Activity: SEMINAR PROGRAM IN JORDAN BY CANOLA COUNCIL OF CANADA AS PART OF REGIONAL INITIATIVE PROPOSED BY THE EMBASSY IN IRAQ.

Results Expected: EXTENSIVE PUBLIC EDUCATION REGARDING CDN CANOLA PRODUCTS AND EXPERTISE WHICH WILL IMPACT ON BUYING DECISIONS OF LOCAL IMPORTERS.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 340 AMMAN

Market: 308 JORDAN

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

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	40.00M	\$ 25.00M	\$ 30.00M	\$ 35.00M
Canadian Exports \$	5.00M	\$ 1.00M	\$ 275.00M	\$ 475.00M
Canadian Share of Import Market	15.00%	3.00%	0.90%	1.30%

Major Competing Countries

Market Share

i) 620 EUROPE	040 %
ii) 265 JAPAN	030 %
iii) 577 UNITED STATES OF AMERICA	010 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) TELECOMM EQUIPMENT	\$ 10.00 M
ii) COMPUTERS AND PERIPHERALS	\$ 5.00 M
iii) TRAINING SERVICES	\$ 5.00 M

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

i) Project Name: PARTIAL PRIVATIZATION OF THE TELECOMMUNICATIONS CORP. (TCC)

Approximate Value: \$ M

Financing Source: 025 OTHER

For further info. please contact:

COMM. DIV. CDN EMBASSY TLX: 23080 CANAD JO - OR

ii) Project Name: TENDERS FOR PROCUREMENT OF RURAL TELEPHONE EQUIPMENT (1988/89)

Approximate Value: \$ 10 M

Financing Source: 001 IBRD

For further info. please contact:

MIDDLE EAST TRADE DEVP. DIV. (GMT) EXT. AFF. OTTAWA.

Export and Investment Promotion Planning System

MISSION: 340 AMMAN

COUNTRY: 308 JORDAN

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

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

- non competitive pricing
- non competitive financing from Canada
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters
- other factor(s) described by the Trade Office as follows:
ENTRENCHED COMPETITION, SUPPORTED BY CONCESSIONARY FINANCING, MAKE MARKET PENETRATION IN TELECOM DIFFICULT AT OFFICIAL LEVEL. BURGEOINING OFFICE AUTOMATION AND SOFTWARE MARKET HAS YET TO BE ADDRESS BY CDN EXPORTERS. WILL BE FOCAL POINT OF POST EFFORTS IN FY88/

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

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

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

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

Activity: PENDING DECISION ON PART OF TELECOMMUNICATIONS CORP. (TCC) TO PROCEED WITH PARTIAL PRIVATIZATION PROGRAM AND PROCUREMENT OF THIRD FAMILY OF SWITCHING PRODUCTS.

Results Expected: IDENTIFICATION OF CONSULTING AND EQUIPMENT SUPPLY OPPORTUNITIES FOR CDN FIRMS.

Activity: WORLD-BANK FUNDED PROCUREMENT OF RURAL TELEPHONE EQUIPMENT TO LINK OUTLYING TOWNS AND VILLAGES WITH NATIONAL TELEPHONE GRID.

Results Expected: AWARD OF TENDERS TO CDN SUPPLIERS BASED UPON TIMELY ADVICE OF INTERNATIONAL BID OPPORTUNITIES.

Export and Investment Promotion Planning System

MISSION: 340 AMMAN

COUNTRY: 308 JORDAN

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

Activity: PRIVATE SECTOR INITIATED SEMINAR PROGRAMS IN JORDAN FOR LOCAL COMPUTER USERS/CUSTOMERS IN DATA NETWORKING TECHNOLOGY AND PRODUCTS FROM CDA.

Results Expected: GREATLY ENHANCED MARKET PRESENCE BY CDN SUPPLIERS BASED ON EFFECTIVE MARKETING AND SUPPORT PROGRAMS TO LOCAL USERS/CUSTOMERS.

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

Activity: POTENTIAL ESTABLISHMENT OF ASSEMBLY/PARTIAL MANUFACTURING FACILITY IN JORDAN BY LEADING CDN TELECOMM EQUIPMENT.

Results Expected: CDN COMMITMENT TO JV/TT IN SECTOR WILL BE MANIFESTED TO AUTHORITIES AND ASSIST IN OVERALL SECTORAL EFFORTS IN KINGDOM.

Activity: INTRODUCTION OF SELECTED CDN EQUIPMENT IN RURAL TELEPHONY TO TCC WITHIN CONTEXT OF BILATERAL DEVELOPMENT ASSISTANCE PROGRAM.

Results Expected: ADDITIONAL PROCUREMENT OF CDN PRODUCTS AFTER SUCCESSFUL INTRODUCTION UNDER AID PROGRAM.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 340 AMMAN

Market: 308 JORDAN

Sector: 007 POWER & ENERGY EQUIP. & SERV.

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size (import) \$	150.00M	\$ 90.00M	\$ 100.00M	\$ 120.00M
Canadian Exports \$	1.00M	\$ 650.00M	\$ 300.00M	\$ 0.00M
Canadian Share of Import Market	0.70%	0.60%	0.30%	0.00%

Major Competing Countries	Market Share
i) 620 EUROPE	045 %
ii) 605 ASIA OR FAR EAST	025 %
iii) 577 UNITED STATES OF AMERICA	015 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) ELEC TRANSMISSION EQUIP	\$ 10.00 M
ii) MAINTENANCE EQUIPMENT	\$ 5.00 M
iii) GENERATION EQUIP	\$ 15.00 M
iv) TRAINING SERVICE	\$ 5.00 M

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

i) Project Name: RISHA-AMMAN HV TRANSMISSION LINE PROJECT
Approximate Value: \$ 10 M
Financing Source: 024 BC
For further info. please contact:
THE COMM. DIV. CDN EMB. TLX: 23080 CANAD JO

ii) Project Name: INTERCONNECT PROJECT WITH NEIGHBOURING COUNTRIES
Approximate Value: \$ M
Financing Source: 024 BC
For further info. please contact:
TLX: 23080 CANAD JO OR

Export and Investment Promotion Planning System

MISSION: 340 AMMAN

COUNTRY: 308 JORDAN

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

iii) Project Name: JEA TENDERS FOR PROCUREMENT OF MAINTENANCE & OTHER EQUIPMENT.

Approximate Value: \$ 10 M

Financing Source: 024 BC

For further info. please contact:

DEPT. EXT. AFF. MIDDLE EAST TRDE DEV. DIV. (GMT) OTTAWA

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

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

- non competitive pricing
- non competitive financing from Canada
- other factor(s) described by the Trade Office as follows:
ABSENCE OF CONCESSIONARY FINANCING FOR PROCUREMENT OF EQUIPMENT & SERVICES IS CRITICAL IN THIS SECTOR WHERE HISTORICALLY IT HAS HAD A LARGE EFFECT. INTRODUCTION OF CDN PRODUCTS AND EXPERTISE THROUGH THE BILATERAL DEVELOPMENT ASSISTANCE PROGRAM SHOULD GREATLY/

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

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- the presence of CIDA programs which have opened the market to Canadian companies
- competitive export pricing for this market
- strong sectoral capability in Canada

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

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

Activity: AWARD OF CONTRACT WITH THE JORDAN ELEC AUTHORITY(JEA)FOR THE AGABA II THERMAL POWER STATION & NUMBER OF TRANSMISSION AND POWER GENERATION FEASIBILITY STIDIES.

Results Expected: SIGNIFICANT CDN PARTICIPATION IN CONSULTING ENGINEERING REQUIREMENTS OF JEA PLANNING;
SLIM HOPES FOR AGABA II PROJECT.

Export and Investment Promotion Planning System

MISSION: 340 AMMAN

COUNTRY: 308 JORDAN

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

Activity: AWARD OF CONTRACT FOR PROCUREMENT OF TRANSDUCERS, INSULATOR WASHING, STRINGING EQUIPMENT AND OTHER MAINTENANCE EQUIPMENT REQUIREMENTS OF JEA.

Results Expected: SUCCESSFUL MARKET PENETRATION BY AT LEAST ONE OF CDN FIRMS WHO PARTICIPATED IN RECENTLY ISSUED TENDERS.

Activity: DEFINITION OF JEA LONG TERM PLANNING FOR UTILIZATION OF INDIGENOUS HYDROCARBON FUELS FOR FEEDSTOCKS IN ELECTRICAL POWER GENERATION SECTOR.

Results Expected: OPPORTUNITY FOR CDN EXPERTISE IN ELECTRICAL ASPECTS OF HYDROCARBON DEVELOPMENT INCLUDING POWER LINES AND ASSOCIATED EQUIPMENT.

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

Activity: ASSESSMENT OF POTENTIAL ELECTRICAL EQUIPMENT REQUIREMENTS IN TERM INTERCONNECT PROJECTS FOR JORDAN WITH SYRIA, EGYPT, AND SAUDI ARABIA.

Results Expected: TIMELY ADVICE OF POTENTIAL SUPPLY OPPORTUNITIES TO CDN CONSULTANTS AND EXPORTERS.

Activity: ASSESSMENT OF TRANSMISSION LINE REQUIREMENTS FOR EXPECTED RISHA-AMMAN GRID CONNECTION.

Results Expected: POSSIBLE CDN PARTICIPATION IN ENGINEERING AND /OR EQUIPMENT PROCUREMENT ASPECTS OF RISHA-AMMAN PROJECT.

Activity: ASSESSMENT OF ELECTRICAL TRANSMISSION REQUIREMENTS OF PROPOSED SULTANI DEVELOPMENT UTILIZING SHALE OIL AS FEEDSTOCK FOR POWER GENERATION.

Results Expected: PROVISION OF EARLY DATA CDN INDUSTRY ON PROJECT AND ANTICIPATED REQUIREMENTS.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 340 AMMAN

Market: 308 JORDAN

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

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	200.00M	\$ 200.00M	\$ 250.00M	\$ 300.00M
Canadian Exports \$	2.00M	\$ 150.00M	\$75000.00M	\$ 240.00M
Canadian Share of Import Market	0.80%	0.06%	0.03%	0.80%

Major Competing Countries

Market Share

i) 620 EUROPE	040 %
ii) 605 ASIA OR FAR EAST	030 %
iii) 577 UNITED STATES OF AMERICA	015 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are
good market prospects

Current Total Imports

In Canadian \$

i) AEROSPACE EQUIP AND SERVICES	\$ 100.00 M
ii) ROLLING STOCK (RR)	\$ 1.00 M
iii) PORT FACILITIES (SERVICES)	\$ 1.00 M

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

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

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

CONCESSIONARY FINANCING FROM MAJOR COMPETITORS HAVE RESULTED IN
ENTRENCHED POSITIONS IN MARKET WHICH ARE DIFFICULT TO COMBAT. INT-
TRODUCTION OF CDN EXPERTISE IN PORTS SECTOR THROUGH OUR AID PROGR-
AM SHOULD PRESENT PORTS CORP WITH VIABLE ALTERNATIVE TO BRITISH/

Export and Investment Promotion Planning System

MISSION: 340 AMMAN

COUNTRY: 308 JORDAN

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

- aggressive marketing on the part of Canadian Exporters
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- the presence of CIDA programs which have opened the market to Canadian companies
- competitive export pricing for this market
- strong sectoral capability in Canada

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

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

Activity: COMPLETION OF DESIGN FOR AGABA MULTI-PURPOSE JETTY PROJECT BY CIDA-FUNDED CANADIAN CONSULTING ENGINEERING FIRM.

Results Expected: ESTABLISHMENT OF CDN DESIGN EXPERTISE IN PORTS SECTOR AS CLEAR ALTERNATIVE TO TRADITIONAL EUROPEAN SOURCES FOR SIMILAR SERVICES.

Activity: FINAL DECISION BY MINISTRY OF TRANSPORT CONCERNING NARROW VS. SINGLE GAUGE TRACK RAILWAY FOR THE DEVELOPMENT OF THE ESHADIYA PHOSPHATE MINING COMPLEX.

Results Expected: POTENTIAL CAN SUPPLY THROUGH INTL TENDERS FOR RAIL REQUIREMENTS OF SHADIYA PROJECT.

Activity: INTRODUCTION OF CDN TRAINING EXPERTISE AND PROGRAM TO AGABA RAILWAY CORP (ARC) UNDER AEGIS OF CIDA BILATERAL DEVELOPMENT ASSISTANCE PROGRAM.

Results Expected: ESTABLISHMENT OF CDA AS CLEAR ALTERNATIVE TO RITES/INDIA AS PURVEYOR OF TRAINING AND ADMIN/MANAGEMENT SERVICES TO ARC.

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

Activity: INTRODUCTION OF CDN EXPERTISE IN ROADS SECTOR THROUGH CIDA INDUSTRIAL COOPERATION PROGRAM (CPPF).

Results Expected: INITIAL CDN PARTICIPATION IN CONSULTING ENGINEERING ELEMENTS OF MAJOR ROAD CONSTRUCTION PROJECTS IN KINGDOM.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 340 AMMAN

Market: 308 JORDAN

Sector: 011 OIL & GAS EQUIPMENT, SERVICES

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	40.00M	\$ 30.00M	\$ 30.00M	\$ 25.00M
Canadian Exports \$	5.00M	\$ 1.00M	\$ 300.00M	\$ 100.00M
Canadian Share of Import Market	10.00%	3.00%	1.00%	0.40%

Major Competing Countries

Market Share

i) 608 WEST EUROPE	035 %
ii) 577 UNITED STATES OF AMERICA	025 %
iii) 605 ASIA OR FAR EAST	020 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) DRILLING EQUIPMENT AND RELATED SERVICES	\$ 5.00 M
ii) NATURAL GAS PRODUCTION EQUIPMENT	\$ 0.00 M
iii) OTHER INDIGENOUS HYDRO CARBON EXPLORATION ACTIVITY	\$ 0.00 M

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

i) Project Name: RISHA NATURAL GAS FIELD PROJECT
(GAS TREATMENT & TRANSMISSION)

Approximate Value: \$ 15 M

Financing Source: 014 FAO

For further info. please contact:

COMM. DIV. CDN. EMBASSY. AMMAN JORDAN TLX: 23080CANDAJO

ii) Project Name: SULTANI SHALE-BURNING DEMONSTRATION

Approximate Value: \$ 40 M

Financing Source: 024 BC

For further info. please contact:

DEPT. EXT. AFF. MIDDLE E. TRADE DEVELOPMENT.

Export and Investment Promotion Planning System

MISSION: 340 AMMAN

COUNTRY: 308 JORDAN

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

iii) Project Name: WADI ISAAL TAR SANDS DEVELOPMENT

Approximate Value: \$ M

Financing Source: 024 BC

For further info. please contact:

(GMT) OTTAWA, ONT.

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

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

- non competitive pricing
- non competitive financing from Canada
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters
- other factor(s) described by the Trade Office as follows:
ACCELERATED EXPLORATION AND EXPLOITATION OF INDEGENOUS HYDROCARBON POTENTIAL IN KINGDOM OFFERS EXTENSIVE SCOPE TO CDN INDUSTRY. PRESENCE IN MARKET OF PETROCANADA AND WESTBURNE DRILLING SHOULD PROVIDE BASIS FOR ACTIVE PURSUIT OF MARKET OPPORTUNITIES BY OTHE/

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

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- the presence of CIDA programs which have opened the market to Canadian companies
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada

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

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

Activity: IMPLEMENTATION OF PCIAC/NRA TECHNICAL SERVICES AGREEMENT FOR EXPLORATION, SEISMIC AND TECHNICAL EXPERTISE IN LOCAL HYDROCARBON DEVELOPMENT.

Results Expected: PERMANENT CDN PRESENCE FOR MINIMUM TWO YEAR PERIOD IN LOCAL OIL AND GAS DEVELOPMENT. ADDITIONAL PRIVATE SECTOR ACTIVITY IS HIGHLY LIKELY.

Export and Investment Promotion Planning System

MISSION: 340 AMMAN

COUNTRY: 308 JORDAN

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

Activity: FINALIZATION OF ASSESSMENT OF NATURAL GAS RESERVES RECENTLY DISCOVERED IN THE KINGDOM NEAR IRAQI BORDER.

Results Expected: POTENTIAL CDN PARTICIPATION IN DEVELOPING OF JORDANIAN GAS DEPOSIT IF FINANCING PACKAGE CAN BE PUT IN PLACE.

Activity: FINALIZATION OF POTENTIAL CDN PARTICIPATION IN THE ANALYSIS OF JORDANIAN OIL SHALE AND TAR SAND DEPOSITS IN ORDER TO EVALUATE POTENTIAL AS INDEPENDENT HYDROCARBON FUELS.

Results Expected: PARTICIPATION BY CDN CONSULTANTS IN THE INITIAL ASSESSMENT OF SHALE AND TAR SANDS RESERVES.

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

Activity: PURSUIT OF POTENTIAL IMPLEMENTATION OF SHALE OIL AND TAR SANDS FACILITIES FOR EXTRACTION OF OIL AND/OR UTILIZATION AS FUEL FEED-STOCK.

Results Expected: AWARD OF CONTRACTS TO CDN FIRMS FOR DEVELOPMENT OF SULTANI SHALE AND WADI ISAAL TAR SANDS DEPOSITS.

Activity: PURSUIT OF CDN PARTICIPATION IN ENGINEERING, PROCUREMENT AND CONTRACTING FOR DEVELOPMENT OF RISHA GAS FIELDS.

Results Expected: AWARD CONTRACT TO CDN FIRMS FOR ENGINEERING AND EQUIP PROCUREMENT ASSOCIATED WITH RISHA DEVELOPMENT.

Activity: PURSUIT OF POTENTIAL CDN PARTICIPATION IN LONG TERM PIPELINE AND STORAGE FACILITIES TO BE REQUIRED BY JORDAN FOR PETROLEUM AND NATURAL GAS.

Results Expected: ENSURE CDN PARTICIPATION IN FINANCING AND PROCUREMENT REQUIREMENTS FOR NATURAL OIL AND GAS PIPELINE PROJECTS.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 340 AMMAN

Market: 308 JORDAN

Sector: 014 EDUCATION, MEDICAL, HEALTH PROD

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	50.00M	\$ 50.00M	\$ 65.00M	\$ 65.00M
Canadian Exports \$	1.00M	\$ 1.00M	\$ 400.00M	\$ 0.00M
Canadian Share of Import Market	2.50%	2.50%	0.60%	0.00%

Major Competing Countries

Market Share

- | | |
|----------------------------------|-------|
| i) 620 EUROPE | 060 % |
| ii) 577 UNITED STATES OF AMERICA | 025 % |

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects.

Current Total Imports In Canadian \$
i) MEDICAL EQUIPMENT \$ 25.00 M
ii) PHARMACEUTICALS \$ 20.00 M

- i) MEDICAL EQUIPMENT
- ii) PHARMACEUTICALS

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

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

- non competitive pricing
- non competitive financing from Canada
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- other factor(s) described by the Trade Office as follows:

IN MEDICAL SECTOR, DISTANCE FROM CDA IS MITIGATING FACTOR FOR EQUIPMENT SUPPLY OPPORTUNITIES. IN EDUCATIONAL FIELD, LACK OF FINANCING SUPPORT TO CDN FIRMS SPECIALIZING IN SERVICES IS PROBLEMATIC VIS-A-VIS ENTRENCHED COMPETITION.

Export and Investment Promotion Planning System

MISSION: 340 AMMAN

COUNTRY: 308 JORDAN

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

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

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

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

Activity: IMPLEMENTATION OF UNIV OF TORONTO/PALESTINE HOSPITAL NEUROLOGICAL CENTRE PROJECT.

Results Expected: POTENTIAL EQUIPMENT SUPPLY AND SPECIALIZED SERVICE OPPORTUNITY IN PROJECT WITH READILY VISIBLE CDN ORIENTATION.

Activity: DETAILED MARKET ASSESSMENT OF POTENTIAL OPPORTUNITIES IN THE SUPPLY OF MEDICAL PHARMACEUTICALS, BIOLOGICAL REAGENTS AND OTHER SIMILAR PRODUCTS.

Results Expected: SUCCESSFUL MARKET PENETRATION BY INCREASING NUMBER OF FIRMS MANUF BIOLOGICAL PRODUCTS INCDA FOR EXPORT.

Activity: INITIATION OF CDN-SPONSORED ACTIVITIES IN RESPECT OF CURRICULUM DEVELOPMENT FOR THE AL-GUDS OPEN UNIVERSITY PROJECT; COORDINATED BY ACCC REGIONAL OFFICE IN AMMAN.

Results Expected: PARTICIPATION IN AQOU PROJECT BY THREE CDN AGENCIES FOCUSING UPON CURRICULUM DEVELOPMENT IN DISTANCE EDUCATION FIELD.

Export and Investment Promotion Planning System

MISSION: 340 AMMAN

COUNTRY: 308 JORDAN

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

Activity: FOLLOW-UP TO JAN. 88 EDUCATIONAL SERVICES AND TRAINING MISSION TO JORDAN.

Results Expected: DEFINITION OF SALES/PROJECT OPPORTUNITIES FOR FFIRMS PARTICIPATING ON MISSION FOR IMPLEMENTATION BY END-1988.

Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: AFRICA-MIDDLE-EAST

Mission: 340 AMMAN

Country: 308 JORDAN

Highlights of Investment Environment

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

\$ 450.00 M

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

\$ 15.00 M

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

1. 577 UNITED STATES OF AMERICA	\$ 300.00 M
2. 608 WEST EUROPE	\$ 150.00 M
3. 616 OTHER COUNTRIES	\$ 50.00 M
4.	\$ M

1. Corporations	: 0.00 %
2. Institutional	: 20.00 %
3. Entrepreneurs	: 70.00 %
4. Immigrant Entr.	: 80.00 %

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

- Capital Flight Associated With Political Uncertainty
- Capital Flight Associated With Economic Uncertainty
- Emigration
- Large Capital Pools Seeking Investment Outlets Abroad (e.g. Oil States)

Equity Propensity Of Key Sources Of Investment From This Territory

Corporations	:
Institutional	:
Entrepreneurs	: Partial Ownership Of Existing Corporate Facilities With Direct Involvement In Day-to-Day Operations
Immigrant Entr.	: Partial Ownership Of Existing Corporate Facilities With Direct Involvement In Day-to-Day Operations

Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: AFRICA-MIDDLE-EAST

Mission: 340 AMMAN

Country: 308 JORDAN

Sector Preferences By Type Of Key Investors

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

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

Sector : 017 SERVICE INDUSTRIES
Subsector: 172 SERVICES NOT ELSEWHERE SPECIF.

Reason(s):

PRIVATE SECTOR COMMERCIAL ACTIVITY IN THE KINGDOM LARGELY FOCUSES ON ABOVE AREAS OF ACTIVITY. LARGE SCALE INDUSTRIES & PRODUCTION FACILITIES ARE PRIMARILY GOV'T OWNED & OPERATED.

Program Plans:

ENCOURAGE POTENTIAL INVESTORS ACTIVE IN THESE INDUSTRIAL SECTORS TO UNDERTAKE RECONNAISSANCE VISITS TO CDA FOR "FIRSTHAND" VIEW OF OPPORTUNITIES IN CDA.

Anticipated Results: IDENTIFICATION OF 6-10 POTENTIAL INVESTOR CANDIDATES WHO WILL UNDERTAKE SUCH VISITS IN 88/89 PERIOD.

Sector : 015 CONSTRUCTION INDUSTRY
Subsector: 151 BUILDING PRODUCTS

Reason(s):

POST EXPERIENCE IN INVESTMENT PROMOTION ACTIVITIES HAS SHOWN MOST ENTREPRENEURS & IMMIGRANT INVESTORS ENGAGED IN SOME TYPE OF ABOVE ACTIVITY WITHIN THE KINGDOM.

Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: AFRICA-MIDDLE-EAST

Mission: 340 AMMAN

Country: 308 JORDAN

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

Sector : 015 CONSTRUCTION INDUSTRY
Subsector: 151 BUILDING PRODUCTS

Program Plans:

PROMOTION OF OPPORTUNITIES CDA CONF. TO LOCAL INDUSTRIALISTS AS
MECHANISM FOR ASSESSING CDA AS DESTINATION FOR FOREIGN INVESTMENT
LOCATION OF REGIONAL OFFICES I. A.

Anticipated Results: PARTICIPATION BY AT LEAST 6-10 JORDANIAN
DELEGATES AT MARCH 89 CONFERENCE.

Sector : 013 CONSUMER PRODUCTS
Subsector: 135 FURNITURE & APPLIANCES

Program Plans:

ACTIVE PROMOTION OF CANADA AS INVESTMENT LOCATION TO JORDANIAN BANKS
FINANCIAL INSTITUTIONS & BUSINESS ORGANIZATIONS.

Anticipated Results: COORDINATION OF EXTERNAL VISITS BY THESE
ORGANIZATIONS TO INCLUDE CDA AS POTENTIAL
SITE FOR INDIVIDUAL AND/OR COOPERATE
INVESTMENT.

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

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

DATE: 88/01/25

DEPARTMENT OF EXTERNAL AFFAIRS

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: AFRICA-MIDDLE-EAST

Mission: 340 AMMAN

Country: 308 JORDAN

Other Investment Program Plans

Activity(ies):

CONTINUING LIAISON WITH OFFICIALS OF CDN BANKS ACTIVE IN REGION IN TERMS OF PRIVATELY ADMINISTERED INVESTMENT SYNDICATES & OTHER OFFSHORE BANKING MECHANISMS WHICH MIGHT HAVE ATTRACTION TO JORDANIAN INVESTORS.

Anticipated Results: RECRUITMENT OF 2-5 SYNDICATE MEMBERS WHICH WILL SERVE TO ENCOURAGE ADDITIONAL LOCAL MARKETING EFFORTS BY CDN BANKS.

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional Projects approved and planned for the coming fiscal year.		
Mission: 340 AMMAN		
Sector: 001 AGRI & FOOD PRODUCTS & SERVICE		
020 MISSION OUTGOING		
OUTGOING AGRICULTURAL EQUIPMENT MISSION		0389
DAIRY SEMINARS (AG CANADA)		1088
Sector: 005 COMM. & INFORM. EQP. & SERV		
020 MISSION OUTGOING		
TELECOMMUNICATIONS PRODUCTS & SERVICES MISSION	AMMAN	0588
OUTGOING COMPUTER TECHNOLOGY MISSION	AMMAN	1188
Sector: 008 TRANSPORT SYS, EQUIP, COMP, SERV.		
020 MISSION OUTGOING		
URBAN TRANSIT: EQUIPMENT & SERVICES MISSION	AMMAN	0988
Sector: 011 OIL & GAS EQUIPMENT, SERVICES		
024 MISSION INCOMING		
INCOMING OIL & GAS MISSION (FROM JORDAN/SYRIA)		0389
Sector: 999 MULTIPLE SECTORS		
020 MISSION OUTGOING		
HIGH LEVEL TECH & INVESTMENT MIS. TO JORDAN	AMMAN	0488
Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 340 AMMAN		
Sector: 001 AGRI & FOOD PRODUCTS & SERVICE		
020 MISSION OUTGOING		
FOOD PROCESSING TECHNOLOGY MISSION		0689
Sector: 005 COMM. & INFORM. EQP. & SERV		
024 MISSION INCOMING		
INCOMING TELECOMMUNICATIONS MISSION		1189
INCOMING COMPUTER TECHNOLOGY MISS. (JORDAN/SYRIA)		0090
Sector: 006 ELECTRONICS EQUIP. & SERV		
020 MISSION OUTGOING		
ADVANCED TECHNOLOGY MISSION TO JORDAN		0090

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 340 AMMAN		
Sector: 007 POWER & ENERGY EQUIP. & SERV.		
020 MISSION OUTGOING ELECTRICAL SECTOR TRAINING SERVICES MISSION		0989

Export and Investment Promotion Planning System

88/89 Trade and Economic Overview

Mission: 341 CAIRO

Country: 564 ARAB REPUBLIC OF EGYPT

IN THE FIRST THREE QUARTERS OF 1987, THE EGYPTIAN ECONOMY SLOWED NOTICEABLY. CDN FIRMS SIGNED CONTRACTS WORTH OVER \$100 MILLION IN THE PAST YEAR, BUT THE LEVEL OF NEW CONSTRUCTION ACTIVITY HAS DECLINED MARKEDLY FROM A YEAR AGO. TOURISM HOWEVER HAS REBOUNDED STRONGLY, AND PETROLEUM EXPLORATION AND INVESTMENT CONTINUE FIRM. OVERALL IMPORTS HAVE DECLINED BY 25% IN THE PAST THREE YEARS AND THIS DECLINE SEEMS TO BE CONTINUING AS OF LATE 1987. CDN EXPORTS TO EGYPT HAVE FALLEN EVEN MORE DRAMATICALLY AND WILL BE UNDER \$100 MILLION IN 1987. AN IMPORTANT EVENT OF 1987 WAS THE CONCLUSION OF A PARIS CLUB AGREEMENT IN MAY FOLLOWED BY NEGOTIATIONS WITH CREDITOR COUNTRIES TOWARDS THE SIGNATURE OF BILATERAL DEBT RESCHEDULING AGREEMENTS BY YEAR END. ANOTHER IMPORTANT MEASURE WAS A NEW FOREIGN CURRENCY EXCHANGE SYSTEM, DESIGNED AS A FIRST STEP TOWARDS A SINGLE UNIFIED EXCHANGE RATE SYSTEM. IMPORTERS WISHING TO OPEN LETTERS OF CREDIT ARE NOW REQUIRED TO DEPOSIT 35% OF THE VALUE UPON APPLICATION. IN THE FIRST MONTHS OF THE NEW SYSTEM, MANY IMPORTERS WERE SUCCESSFUL IF GETTING L/C'S OPENED WITHIN A MONTH OF APPLICATION, WHILE OTHERS WERE ABLE TO SECURE FOREIGN EXCHANGE BY OTHER LEGAL MEANS AT A SLIGHT PREMIUM. THE NEW FIVE-YEAR PLAN HAS BEEN PUBLISHED COVERING THE PERIOD JULY 1, 1987 TO JUNE 30, 1992. THE PLAN EMPHASIZES THE COMPLETION AND FULLER UTILIZATION OF INVESTMENT PROJECTS ALREADY UNDERTAKEN, AND ENVISIONS FEWER NEW PUBLIC SECTOR PROJECTS THAN THE PREVIOUS PLAN. A MUCH HIGHER PROPORTION OF NEW INVESTMENT IN THE NEW PLAN IS TO BE UNDERTAKEN BY THE PRIVATE SECTOR, ESPECIALLY IN THE MANUFACTURING INDUSTRY. THE NEW PLAN THEREFORE REFLECTS THE AUSTERITY THAT THE PUBLIC SECTOR MUST CONFRONT FOR THE NEXT FEW YEARS AS ITS ECONOMIC RESTRUCTURING PROGRAM TAKES EFFECT. NONETHELESS THERE REMAIN WORTHWHILE OPPORTUNITIES FOR CDN BIDDERS ON CAPITAL PROJECTS, ESPECIALLY IN NATURAL GAS, WHERE THE PLAN CALLS FOR DOUBLING OF PRODUCTION IN FIVE YEARS; IN ELECTRIC POWER, WHERE A NUMBER OF COMBINED CYCLE UNITS WILL CONTINUE THE TREND TO GAS AND COAL AS FUELS; AND IN SELECTED PROJECTS IN INDUSTRY AND TOURISM. AN IMPORTANT FACTOR IN CDN COMPETITIVENESS ON SUCH PROJECTS WILL BE THE AVAILABILITY OF EXPORT CREDIT, WHICH WILL BE DETERMINED ONLY AFTER THE SIGNATURE OF THE CDA-EGYPT BILATERAL DEBT RESCHEDULING. IN THE FIELD OF ESSENTIAL STAPLE PRODUCTS, SUCH AS WHEAT, TALLOW, FISH, EDIBLE OILS, NEWSPRINT, LUMBER, SEED POTATO, AND TOBACCO, OPPORTUNITIES FOR CDN EXPORTERS REMAIN STRONG, AND WILL CONTINUE TO DEPEND PRIMARILY ON CDN PRICE COMPETITIVENESS AND SUPPLY CAPABILITIES. OVER THE PAST YEAR, CDN LUMBER EXPORTERS HAVE WON AN INCREASED MARKET SHARE, THERE WAS A MAJOR TOBACCO SALE, AND NEW OPPORTUNITIES ARE BEING EXPLORED FOR FISH, COAL AND CANOLA OIL. OPPORTUNITIES ALSO EXIST FOR THE SALE OF EGPT AND SUPPLIES TO THE GROWING EGYPTIAN PRIVATE SECTOR. THESE OPPORTUNITIES ARE MORE DIFFICULT TO QUANTIFY, AS PRIVATE

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 341 CAIRO

Market: 564 ARAB REPUBLIC OF EGYPT

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

1. 003 GRAINS AND OILSEEDS

REASONS: EGYPT'S IMPORTS OF EDIBLE OIL ARE 600,000 TONNES PER YEAR AND GROWING, AND WILL BE OPEN TO CANOLA ONCE APPROVAL FOR HUMAN CONSUMPTION IS RE-INSTATED (TARGET 1988). ALSO IF WHEAT AGREEMENTS ARE FULFILLED, 750,000

2. 007 POWER & ENERGY EQUIP. & SERV.

REASONS: SEVERAL CDN SUPPLIERS HAVE ESTABLISHED THEMSELVES IN EGYPT (PARTLY VIA CIDA PROJECTS) AND ARE READY TO PURSUE IFI FUNDED PROJECTS. CANDU SYSTEM MAY BE GIVEN GREEN LIGHT IN 1988.

3. 011 OIL & GAS EQUIPMENT, SERVICES

REASONS: EGYPT PLANS TO MAINTAIN PRODUCTION AT 870,000 BPD OF CRUDE OVER NEXT FIVE YEARS WHILE CONCENTRATING ON DOUBLING NATURAL GAS PRODUCTION. KEY SECTOR WHICH EARNS OWN FOREIGN EXCHANGE.

4. 009 FOREST PRODUCTS, EQUIP, SERVICES

REASONS: LACKING FORESTS, EGYPT IMPORTS 1 MILLION CU. FT PER YEAR OF LUMBER. CDN COMPETITIVENESS DEMONSTRATED IN 1987 IS EXPECTED TO CONTINUE IN 1988.

5. 005 COMM. & INFORM. EQP. & SERV

REASONS: EGYPT HAS NO MAJOR MANUFACTURERS AND HAS FOUND SOME CANADIAN EQUIPMENT ESPECIALLY SUITED TO EGYPTIAN NEEDS.

6. 010 MINE, METAL, MINERAL PROD & SRV

REASONS: EGYPT HAS FEW MINERAL RESOURCES, AND MUST IMPORT ASBESTOS, SULPHUR, COAL & STEEL. CIDA COMMODITY AID IS INTRODUCING CDN COAL IN '87 AND COMMERCIAL SALES MAY FOLLOW. MAJOR STEEL CONTRACT IS BEING NEGOTIATED.

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

1. 003 GRAINS AND OILSEEDS
2. 009 FOREST PRODUCTS, EQUIP, SERVICES
3. 007 POWER & ENERGY EQUIP. & SERV.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 341 CAIRO

Market: 564 ARAB REPUBLIC OF EGYPT

Sector: 001 AGRI & FOOD PRODUCTS & SERVICE

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	3.00M	\$ 3.50M	\$ 3.65M	\$ 3.50M
Canadian Exports \$	0.00M NA	\$ 3.50M	\$ 0.00M NA	\$ 0.00M
Canadian Share of Import Market	0.00% NA	1.00%	0.00% NA	0.00%

Major Competing Countries

Market Share

- | | |
|----------------------------------|-------|
| i) 609 EUROPEAN COMMON MARKET C | 060 % |
| ii) 577 UNITED STATES OF AMERICA | 020 % |

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) ANIMAL & POULTRY BREEDING STOCK	\$ 0.10 M
ii) SEEDS & SPECIAL CROPS	\$ 20.00 M
iii) FOOD HANDLING AND PROCESSING EQUIPMENT	\$ 0.10 M
iv) AGRICULTURAL EQUIPMENT	\$ 0.10 M
v) SEED, FERTILIZERS, VET. PRODUCTS	\$ 0.09 M

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

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

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

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

Export and Investment Promotion Planning System

MISSION: 341 CAIRO

COUNTRY: 564 ARAB REPUBLIC OF EGYPT

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

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

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

- product/service information from Canadian companies

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

Activity: PREPARE AND UPDATE SECTORIAL REPORT.

Results Expected: RECOMMENDATION FOR TRADE PROMOTION STRATEGY.

Activity: VISIT NEW ISLAMIC INVESTMENT COS IN ORDER TO BLEND CANADIAN DRY LAND FARMING KNOW-HOW WITH ISLAMIC INVESTMENT COS' CAPABILITIES IN FARMING PROJECTS.

Results Expected: CANADIAN MANAGEMENT OR JOINT VENTURE OF AT LEAST ONE LARGE SCALE MODERN FARM PROJECT.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 341 CAIRO

Market: 564 ARAB REPUBLIC OF EGYPT

Sector: 002 FISHERIES, SEA PRODUCTS & SERV.

Subsector: 021 FISH & SHELLFISH & OTHER PROD

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	92.00M	\$ 90.00M	\$ 93.00M	\$ 0.00M NA
Canadian Exports \$	0.00M	\$ 0.00M	\$ 0.00M	\$ 0.00M
Canadian Share of Import Market	0.00%	0.00%	0.00%	0.00%

Major Competing Countries

Market Share

i) 553 UNION OF SOVIET SOC REP	000 %
ii) 268 KOREA	000 %

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

Current status of Canadian exports: No Export results to date

Products/services for which there are good market prospects

Current Total Imports
In Canadian \$
\$ 0.00 M

i) FROZEN FISH

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

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

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

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters
- other factor(s) described by the Trade Office as follows:
CANADIAN SUPPLIERS HAVE NOT YET MET EGYPTIAN IMPORTERS TO WORK OUT SUPPLY/OFFER AND IF NECESSARY CUSTOM FISHING PLAN.

Export and Investment Promotion Planning System

MISSION: 341 CAIRO

COUNTRY: 564 ARAB REPUBLIC OF EGYPT

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

- competitive export pricing for this market

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

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

Activity: VISIT IMPORT AGENTS AND PUBLIC SECTOR AUTHORITIES TO GATHER INFORMATION.

Results Expected:

Activity: COMPILE SECTORIAL REPORT AND RECOMMENDATION.

Results Expected: RECOMMENDATION FOR TRADE PROMOTIONAL STRATEGY.

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

Activity: VISIT BY FISH BUYERS TO CANADA.

Results Expected: ORDER FOR FROZEN FISH WORTH AT LEAST \$1 MILLION.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 341 CAIRO

Market: 564 ARAB REPUBLIC OF EGYPT

Sector: 003 GRAINS AND OILSEEDS

Subsector: 032 OILSEEDS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	300.00M	\$ 360.00M	\$ 360.00M	\$ 300.00M
Canadian Exports \$	0.00M	\$ 0.00M	\$ 0.00M	\$ 0.00M
Canadian Share of Import Market	10.00%	0.00%	0.00%	0.00%

Major Competing Countries

Market Share

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

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

Current status of Canadian exports:

Products/services for which there are good market prospects
i) CANDLA

Current Total Imports
In Canadian \$
\$ 0.00 M

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

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

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

- non competitive pricing
- non-tariff protectionist measures which are difficult to overcome
- difficulties in obtaining credit facilities in Canada
- other factor(s) described by the Trade Office as follows:

MEDICAL STANDARDS

Export and Investment Promotion Planning System

MISSION: 341 CAIRO

COUNTRY: 564 ARAB REPUBLIC OF EGYPT

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

- No factors reported by mission

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

Activity: GAIN APPROVAL FOR CANOLA TO BE IMPORTED.

Results Expected: CANOLA APPROVED.

Activity: IDENTIFY POTENTIAL IMPORTERS/PROCESSORS.

Results Expected: CANOLA IMPORTED: \$3 MIL SALES.

Export and Investment Promotion Planning System

BB/87 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: MIDDLE EAST

Mission: 341 CAIRO

Market: 564 ARAB REPUBLIC OF EGYPT

Sector: 005 COMM. & INFORM. EGP. & SERV

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	0.00M	\$ 5.00M	\$ 10.00M	\$ 0.00M
Canadian Exports \$	0.00M	\$ 0.60M	\$ 0.90M	\$ 0.50M
Canadian Share of Import Market	0.00%	10.00%	9.00%	5.00%

Major Competing Countries

Market Share

i) 265 JAPAN	025 %
ii) 237 ITALY	020 %
iii) 112 FRANCE	020 %
iv) 577 UNITED STATES OF AMERICA	015 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) PBX & COMPONENTS TELEPHONE SWITCHES	\$ 5.00 M
ii) MICROWAVES AND RELATED PRODUCTS	\$ 0.00 M
iii) WORKPLACE AUTOMATION	\$ 0.00 M
iv) COMPUTERS & INFORMATICS	\$ 0.00 M
v) NAVIGATIONAL AIDS FOR CIVIL AVIATION	\$ 5.00 M
vi) REMOTE SENSING	\$ 0.00 M

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

i) Project Name: IMAGE SATELLITE RECEPTION GROUND STATION
Approximate Value: \$ 40 M
Financing Source:
For further info. please contact:
CANADIAN EMBASSY

ii) Project Name: DEVELOPMENT & UPGRADING OF NAVIGATION
EGP & COMMERCIAL EGP FOR CIVIL AVIATION
Approximate Value: \$ 5 M
Financing Source:
For further info. please contact:
CANADIAN EMBASSY

Export and Investment Promotion Planning System

MISSION: 341 CAIRO

COUNTRY: 564 ARAB REPUBLIC OF EGYPT

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

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

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

- non competitive financing from Canada
- difficulties in obtaining credit facilities in Canada

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

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

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

Activity: ANALYSIS OF NEW 5-YEAR PLAN

Results Expected: SHORTLIST OF GOVERNMENT INVESTMENT PROJECTS OF INTEREST.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 341 CAIRO

Market: 564 ARAB REPUBLIC OF EGYPT

Sector: 007 POWER & ENERGY EQUIP. & SERV.

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	656.00M	\$ 469.00M	\$ 0.00M	\$ 0.00M
Canadian Exports \$	39.00M	\$ 0.50M	\$ 1.70M	\$ 7.00M
Canadian Share of Import Market	6.00%	0.00%	0.00%	0.00%

Major Competing Countries

Market Share

i) 112 FRANCE	000 %
ii) 051 UNITED KINGDOM	000 %
iii) 237 ITALY	000 %
iv) 507 SWEDEN	000 %

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

60-100 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are
good market prospects

Current Total Imports

	In Canadian \$
i) NUCLEAR REACTOR	\$ 0.00 M
ii) THERMAL BOILERS	\$ 0.00 M
iii) WIRE & CABLE	\$ 0.00 M

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

i) Project Name: EGYPT POWER IV
Approximate Value: \$ 600 M
Financing Source: 001 IBRD
For further info. please contact:
T.D. GREENWOOD

Export and Investment Promotion Planning System

MISSION: 341 CAIRO

COUNTRY: 564 ARAB REPUBLIC OF EGYPT

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

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

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

- non competitive financing from Canada
- difficulties in obtaining credit facilities in Canada

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

- aggressive marketing on the part of Canadian Exporters
- the presence of CIDA programs which have opened the market to Canadian companies
- competitive export pricing for this market

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

Activity: SUPPORT OF AECL FOR CANDU SALE.

Results Expected: CONTRACT FOR REACTOR 1991.

Activity: ANALYSE 5-YEAR PLAN AND IFI PIPELINE TO SELECT BEST CANDIDATE PROJECTS FOR CANADIAN SALES EXPORTS.

Results Expected: SHORTLIST OF 5 PROJECTS FOR CANADIAN SUPPLIERS.

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

Activity: COMPLETE SIGNATURE AND FINANCING AGREEMENT FOR \$24 MILLION METRO-SEPTIA PROJECT.

Results Expected: CONTRACT IN FORCE.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 341 CAIRO

Market: 564 ARAB REPUBLIC OF EGYPT

Sector: 009 FOREST PRODUCTS, EQUIP, SERVICES

Subsector: 092 WOOD AND WOOD PRODUCTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	170.00M	\$ 150.00M	\$ 155.00M	\$ 0.00M NA
Canadian Exports \$	35.00M	\$ 20.00M	\$ 10.00M	\$ 0.00M NA
Canadian Share of Import Market	21.00%	14.00%	5.46%	0.00%

Major Competing Countries	Market Share
i) 504 FINLAND	000 %
ii) 068 CHILE	000 %
iii) 035 ROMANIA	000 %
iv) 553 UNION OF SOVIET SOC REP	000 %

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

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) WHITEWOOD SPF	\$ 0.00 M

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

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

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

- a lack of interest in the market on the part of Canadian exporters
- difficulties in obtaining credit facilities in Canada

Export and Investment Promotion Planning System

MISSION: 341 CAIRO

COUNTRY: 564 ARAB REPUBLIC OF EGYPT

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

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

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

- product/service information from Canadian companies

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

Activity: KEEP IN CONTACT WITH LUMBER IMPORTERS TO SEEK OPPORTUNITIES AND UPDATE REPORTS ON LUMBER MARKET SITUATION FOR FOLLOW-UP BY CANADIAN EXPORTERS.

Results Expected: \$35 MILLION EXPORTS IN 1988/89.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 341 CAIRO

Market: 564 ARAB REPUBLIC OF EGYPT

Sector: 010 MINE, METAL, MINERAL PRODD & SRV

Subsector: 102 MINERALS AND MINERAL PRODUCTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	255.00M	\$ 250.00M	\$ 235.00M	\$ 0.00M NA
Canadian Exports \$	30.00M	\$ 25.00M	\$ 20.00M	\$ 0.00M NA
Canadian Share of Import Market	12.00%	10.00%	8.50%	0.00%

Major Competing Countries

Market Share

i) 553 UNION OF SOVIET SOC REP	000 %
ii) 011 AUSTRALIA	000 %
iii) 128 GERMANY WEST	000 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

i) COAL	In Canadian \$	\$ 0.00 M
ii) SULPHUR		\$ 0.00 M

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

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

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

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

Export and Investment Promotion Planning System

MISSION: 341 CAIRO

COUNTRY: 564 ARAB REPUBLIC OF EGYPT

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

- aggressive marketing on the part of Canadian Exporters
- the presence of CIDA programs which have opened the market to Canadian companies

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

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

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

Activity: THE CIDA COMMODITY AID TENDER TO INTRODUCE CANADIAN SPEC COKING COAL IN 1988 AND SULPHUR IN 1989.

Results Expected: 1) INITIAL SALE OF 40,000 TONNE COAL.
2) ACCEPTANCE OF CANADIAN SPEC FOR MINING WITH OTHERS.

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

Activity: STUDY OF EGYPTIAN MARKETS FOR CANADIAN MINERAL EXPORTS.

Results Expected: SECTOR STRATEGY AND PROMOTIONAL PLAN.

Activity: FOLLOW-UP SUCCESS IN USE OF INTRODUCTORY CANADIAN AID COAL SHIPMENTS AND SEEK ADAPTATION OF EGYPTIAN SPECS TO PERMIT CANADIAN QUOTES.

Results Expected: FIRST COMMERCIAL SHIPMENT OF CANADIAN COAL.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 341 CAIRO

Market: 564 ARAB REPUBLIC OF EGYPT

Sector: 011 OIL & GAS EQUIPMENT, SERVICES

Subsector: 116 MACHINERY AND EQUIPMENT

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

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	060 %
ii) 237 ITALY	010 %
iii) 112 FRANCE	020 %
iv) 265 JAPAN	010 %

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

30-60 \$M

Current status of Canadian exports:

Products/services for which there are
good market prospects

Current Total Imports

	In Canadian \$
i) EXPLORATION/DRILLING EQUIPMENT	\$ 0.00 M
ii) GAS TREATMENT EQUIPMENT/SERVICES	\$ 0.00 M
iii) FIELD PROCESSOR UNITS	\$ 0.00 M
iv) CORROSION PREVENTION/PROTECTION	\$ 0.00 M

Projects or portion of projects which are still in the planning
stage and for which Canadian companies might have reasonable prospects.i) Project Name: MANY SMALLER GAS TREATMENT & PIPELINE
PROJECTS

Approximate Value: \$ M

Financing Source:

For further info. please contact:
EMBASSY

Export and Investment Promotion Planning System

MISSION: 341 CAIRO

COUNTRY: 564 ARAB REPUBLIC OF EGYPT

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

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

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

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- other factor(s) described by the Trade Office as follows:

PREQUALIFICATION REQUIRED FOR SALE OF EQUIPMENT AND SERVICES FOR EXPLORATION AND DRILLING

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

- strong sectoral capability in Canada

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

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

Activity: VISITS TO AGENTS, PUBLIC SECTOR OFFICIALS, AND JV OPERATORS TO GATHER INFO, PREPARE REPORT.

Results Expected: SECTOR PROMOTIONAL STRATEGY.

Export and Investment Promotion Planning System

88/89 Trade and Economic Overview

Mission: 342 TEL AVIV

Country: 232 ISRAEL

THE ECONOMIC RECOVERY THAT BEGAN IN THE 2ND HALF OF 86 CONTINUED DURING THE 1ST EIGHT MONTHS OF 87. ONE EFFECT OF THE DRASTIC MEASURES INTRODUCED TO STABILIZE THE ECONOMY HAS BEEN A CONCENTRATION OF GROWTH IN THE PRIVATE RATHER THAN THE PUBLIC SECTOR. ANOTHER HAS BEEN THE MAINTENANCE OF RELATIVE PRICE STABILITY - INFLATION HAS BEEN HELD TO A RANGE OF 15-20% SINCE THE BEGINNING OF 86. ECONOMIC STABILIZATION HAS BEEN ACCOMPANIED BY INDUSTRIAL GROWTH OF ABOUT 4% DURING THE CURRENT YEAR WHILE DOMESTIC INVESTMENT ROSE 7% & UNEMPLOYMENT FELL 1 POINT TO 6%. TOURISM DURING THE 1ST HALF OF 87 WAS 25% ABOVE THE CORRESPONDING PERIOD OF 86 WIDENING THE TRADE DEFICIT TO US\$1.6 BIL. FOR THE FIRST 6 MONTHS OF THE YEAR. THIS WORRISOME TREND IS MITIGATED SOMEWHAT BY A RECENT UPTICK IN EXPORTS. MEASURES IMPOSED AS PART OF THE ECONOMIC STABILIZATION PLAN INCLUDE ROLLBACKS OF COST OF LIVING LINKED WAGE INCREASES CUTS IN NATIONAL INSURANCE COSTS TO EMPLOYERS REDUCTIONS IN SUBSIDIES A GRADUAL DISMANTLING OF PRICE CONTROLS TAX CUTS AND LIBERALIZATION OF MONEY MARKETS. SO FAR THE PROGRAM HAS SUCCEEDED. A GROWING CLAMOUR FOR DEVALUATION ON THE PART OF MANUFACTURERS WHO SEE THEIR EXPORT PROFITABILITY BEING ERODED POSES A POTENTIAL DANGER TO PRICE STABILITY BUT HAS SO FAR BEEN RESISTED BY THE MIN. OF FINANCE. THE BENEFITS OF THE LAST DEVALUATION EARLY IN 87 WAS ERASED BY PRICE AND WAGE INCREASES WITHIN A FEW MONTHS. WHILE ISRAELI IMPORTS INCREASED BY SOME 23% DURING THE 1ST HALF OF 87 IMPORTS FROM CDA INCREASED BY 37%. SULPHUR BARLEY AND WOOD PULP WERE OUR LARGEST EXPORT ITEMS BUT SIGNIFICANT SALES OF BABY FOODS MOTOR VEHICLES VALVES AIRCRAFT ENGINES AND WOVEN FABRICS INDICATE THAT THE ISRAELI MARKET IS SUSCEPTIBLE TO A WIDE RANGE OF MARKETING EFFORT. ISRAEL IS NOW CDA'S 2ND LARGEST MARKET IN THE REGION UP FROM 4TH PLACE IN 84. ISRAEL IS ALSO A CENTRE OF EXCELLENCE IN VARIOUS FIELDS OF HIGH TECHNOLOGY NOTABLY MEDICAL DEVICES AGRICULTURAL EQUIPMENT BIOTECHNOLOGY AND FOOD PROCESSING. AN INCREASING NUMBER OF CDN FIRMS ARE SEEKING TECHNOLOGY FROM ISRAEL UNDER THE TECHNOLOGY INFLOW PROGRAM. CYPRUS OFFERS NUMEROUS ADVANTAGES TO CDN FIRMS WISHING TO ESTABLISH A BASE FOR OPERATIONS THROUGHOUT THE AREA AND IS ITSELF A MARKET OF GROWING INTEREST. AN INCREASING NUMBER OF CAPITAL PROJECTS PRESENT OPPORTUNITIES FOR CDN SUPPLIERS AND EDC FINANCING IS GENERALLY AVAILABLE.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 342 TEL AVIV

Market: 232 ISRAEL

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

1. 014 EDUCATION, MEDICAL, HEALTH PROD

REASONS: IMPORTS OF SPECIALIZED COST-CUTTING HEALTHCARE DEVICES IS GROWING RAPIDLY. CDA PARTICIPATING IN MEDAX MAY88. ISRAELI FIRMS WANT TO IMPORT TECHNOLOGY COMPONENTS FOR RE-EXPORT TO EC UNDER ISRAEL/EC TA.

2. 007 POWER & ENERGY EQUIP. & SERV.

REASONS: CDA SUPPLIED MAJOR COMPONENTS TO 3 CONSECUTIVE NEW THERMAL STATIONS DURING THE PAST 2 DECADES. AN OPPORTUNITY TO BID SOME CDN\$6.5M AUXILIARY EQUIP. WILL ARISE DURING 88/89. IN PAST YRS POST PROMOTIONAL

3. 003 GRAINS AND OILSEEDS

REASONS: PREVIOUS WORK HAS LED ISRAELI CRUSHERS TO POINT OF SWITCHING AWAY FROM SOY IN FAVOUR OF CANOLA. WE PLAN INCOMING MISSION IN 88.

4. 016 INDUSTRIAL MACHIN, PLANTS, SERV.

REASONS: LITTLE OR NO PROMOTION UNDERTAKEN IN PAST. POST WILL ATTEMPT TO INTRODUCE CANADIAN MACHINERY TO MARKET. FAIR PARTICIPATION PROPOSED.

5. 001 AGRI & FOOD PRODUCTS & SERVICE

REASONS: RAPID MECHANIZATION IN AG SECTOR LEADING TO RISING IMPORTS. DRYLAND TECHNIQUES SIMILAR TO PRAIRIES EMPLOYED. POST EMBARKING ON PROMOTION IN THIS SECTOR PROPOSING BUYING MISSION TO CDA IN 89.

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

1. 010 MINE, METAL, MINERAL PROD & SRV
2. 003 GRAINS AND OILSEEDS
3. 008 TRANSPORT SYS, EQUIP, COMP, SERV.
4. 009 FOREST PRODUCTS, EQUIP, SERVICES

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 342 TEL AVIV

Market: 232 ISRAEL

Sector: 001 AGRI & FOOD PRODUCTS & SERVICE

Subsector: 016 AGRICULTURE MACH, EQUIP, TOOLS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	90.00M	\$ 74.00M	\$ 58.00M	\$ 0.00M
Canadian Exports \$	0.40M	\$ 0.30M	\$ 0.20M	\$ 0.00M
Canadian Share of Import Market	0.40%	0.40%	0.30%	0.00%

Major Competing Countries

Market Share

- i) 609 EUROPEAN COMMON MARKET C
- ii) 577 UNITED STATES OF AMERICA

060 %
040 %

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

0-1 \$M

Current status of Canadian exports: Mature with little growth

Products/services for which there are
good market prospects

- i) FARM IMPLEMENTS
- ii) FARM STORAGE EQUIPMENT

Current Total Imports In Canadian \$
\$ 0.20 M
\$ 0.00 M

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

- a lack of interest in the market on the part of Canadian exporters
- high tariffs

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

- strong sectoral capability in Canada

Export and Investment Promotion Planning System

MISSION: 342 TEL AVIV

COUNTRY: 232 ISRAEL

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

Activity: STUDY MARKET CHANNELS.

Results Expected: IDENTIFICATION OF BEST OPPORTUNITIES

Activity: SOURCING STUDY.

Results Expected: SELECTION OF EXHIBITORS AT AGRITECH.

Activity: INVENTORY OF TECHNOLOGY AVAILABLE IN ISRAEL FOR TIP.

Results Expected: PREPARE FOR INCOMING MISSION.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 342 TEL AVIV

Market: 232 ISRAEL

Sector: 003 GRAINS AND OILSEEDS

Subsector: 031 CEREAL GRAINS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	240.00M	\$ 238.60M	\$ 258.40M	\$ 0.00M
Canadian Exports \$	22.00M	\$ 21.60M	\$ 26.60M	\$ 0.00M
Canadian Share of Import Market	11.00%	9.00%	10.20%	0.00%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	080 %
ii) 609 EUROPEAN COMMON MARKET C	020 %
iii) 288 SOUTH AFRICA	000 %

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

Current status of Canadian exports: No Export results to date

Products/services for which there are good market prospects

Current Total Imports
In Canadian \$

i) OILSEEDS/CANOLA	\$ 0.00 M
ii) BARLEY	\$ 15.20 M
iii) WHEAT	\$ 6.40 M

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

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

- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- non-tariff protectionist measures which are difficult to overcome
- difficulties in obtaining credit facilities in Canada
- other factor(s) described by the Trade Office as follows:

DEMAND FOR OFFSETS AGAINST BARLEY SALES: WHEAT SUPPLIED UNDER US AID PACKAGE.

Export and Investment Promotion Planning System

MISSION: 342 TEL AVIV

COUNTRY: 232 ISRAEL

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

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

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

Activity: FOLLOW-UP ON OUTGOING CANOLA MISSION (MARCH 87) AND PREPARE INCOMING FOR 88/89.

Results Expected: INITIALE SALE OF CANOLA (SEEDS AND MEAL) ON TRIAL BASIS.

Activity: CONTINUED REPRESENTATIONS WITH GOVERNMENT TRADE ADMINISTRATION AND INDUSTRIAL COOPERATION AUTHORITY.

Results Expected: PREVENT RECURRENCE OF BARTER ISSUE.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 342 TEL AVIV

Market: 232 ISRAEL

Sector: 007 POWER & ENERGY EQUIP. & SERV.

Subsector: 072 THERMAL

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	10.00M	\$ 0.00M	\$ 0.00M	\$ 0.00M
Canadian Exports \$	6.00M	\$ 0.00M	\$ 0.00M	\$ 0.00M
Canadian Share of Import Market	60.00%	0.00%	0.00%	0.00%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	000 %
ii) 128 GERMANY WEST	000 %
iii) 051 UNITED KINGDOM	000 %
iv) 112 FRANCE	000 %
v) 512 SWITZERLAND	000 %

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

Current status of Canadian exports: No Export results to date

Products/services for which there are good market prospects

Current Total Imports In Canadian \$

i) POWER STA AUX EQUIPMENT.

\$ 0.00 M

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

i) Project Name: AUXILIARY EQUIPMENT FOR NEW POWER STATION (SEE 7-8)

Approximate Value: \$ 65 M

Financing Source: 023 EDC

For further info. please contact:

POST - C. FYNNE BUREAU C. DABRUS (GMT)

Export and Investment Promotion Planning System

MISSION: 342 TEL AVIV

COUNTRY: 232 ISRAEL

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

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

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

- non competitive pricing
- non competitive financing from Canada

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

- aggressive marketing on the part of Canadian Exporters
- the availability of competitive Canadian financing

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

Activity: ASCERTAIN WHICH OF 76 COMPANIES SUBMITTED AS SUPPLIERS OF 30 PRODUCT GROUPS WILL BE INVITED TO BID ON ESTIMATED CA\$65M AUXILIARY EQUIPMENT FOR NEW POWER STATION.

Results Expected: ENEBLES POST TO ALERT COMPANIES, PROVIDE INFORMATION ON UTILITY PROCUREMENT PRACTICES, MONITOR RESPONSES AND REACTIONS OF CLIENT.

Activity: UTILITY WILL SOLICIT US\$50M LOAN FROM EDC IN SEGMENTS AS BIDDING PROGRESSES. POST WILL PROVIDE FREQUENT UPDATE TO EDC ON WIN/LOSE CRITERIA WHEN AVAILABLE.

Results Expected: ENABLE OPTIMUM FLEXIBILITY IN LOAN CONDITIONS DURING THE PROCUREMENT PHASE.

Activity: WORK WITH KEY AGENTS/UTILITY PERSONNEL TO IDENTIFY ADDITIONAL OPPORTUNITIES FOR CANADA. CURRENT 30 PRODUCTS BASED ON PREVIOUS CANADIAN SUPPLY. THERE ARE SOME 500 ITEMS TO BE PURCHASED.

Results Expected: EXPAND PARAMETERS OF PROJECT.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 342 TEL AVIV

Market: 232 ISRAEL

Sector: 014 EDUCATION, MEDICAL, HEALTH PROD

Subsector: 141 PHARMACEUTICALS, BIOTECHNOLOGY

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	260.00M	\$ 195.00M	\$ 0.00M	\$ 0.00M
Canadian Exports \$	0.75M	\$ 0.50M	\$ 0.00M	\$ 0.00M
Canadian Share of Import Market	0.20%	0.20%	0.00%	0.00%

Major Competing Countries

Market Share

- | | |
|----------------------------------|-------|
| i) 609 EUROPEAN COMMON MARKET C | 060 % |
| ii) 577 UNITED STATES OF AMERICA | 040 % |

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) MEDICAL DEVICES	\$ 0.21 M
ii) PHARMACEUTICALS	\$ 0.16 M
iii) DISPOSABLES	\$ 0.00 M
iv) LABORATORY INSTRUMENTATION	\$ 0.00 M
v) RAW MATERIALS	\$ 0.00 M
vi) SPECIALITY CHEMICALS	\$ 0.00 M

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

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

- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

Export and Investment Promotion Planning System

MISSION: 342 TEL AVIV

COUNTRY: 232 ISRAEL

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

- No factors reported by mission

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

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

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

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

Activity: IDENTIFY MAIN IMPORT/DISTRIBUTION CHANNELS FOR HEALTH CARE PRODUCTS.

Results Expected: COMPILE AGENTS/DISTRIBUTORS LIST AND PRIORITIZE PRODUCTS ACCORDING TO MARKET AND NEEDS.

Activity: IDENTIFY CANADIAN SOURCES—PREPARATION FOR AND FOLLOW-UP OF MAJOR TRADE SHOW (MEDAX).

Results Expected: AGENCY AGREEMENTS, EXPORT SALES.

Activity: COMPLETE INVENTORY OF ISRAELI CAPABILITIES IN THIS SECTOR AND PROMOTE AND MATCH UP WITH CANADIAN EWQUESTS FOR TECHNOLOGY.

Results Expected: JOINT VENTURES/LICENSING ARRANGEMENTS.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 342 TEL AVIV

Market: 232 ISRAEL

Sector: 016 INDUSTRIAL MACHIN, PLANTS, SERV.

Subsector: 161 MANUFACT & MATERIAL PLANT, EGP.

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	500.00M	\$ 700.00M	\$ 400.00M	\$ 315.00M
Canadian Exports \$	5.00M	\$ 4.00M	\$ 4.50M	\$ 7.00M
Canadian Share of Import Market	1.00%	0.50%	1.00%	2.00%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	038 %
ii) 128 GERMANY WEST	028 %
iii) 237 ITALY	013 %
iv) 051 UNITED KINGDOM	010 %
v) 112 FRANCE	006 %
vi) 265 JAPAN	005 %

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

Current status of Canadian exports: Market share declining

Products/services for which there are
good market prospects

Current Total Imports

	In Canadian \$
i) IND. BOILERS/PARTS	\$ 2.00 M
ii) AUX. PLANT FOR IND. BLRS	\$ 0.50 M
iii) PUMPS	\$ 20.00 M
iv) FANS/BLOWERS	\$ 7.00 M
v) AIR COMPRESSORS	\$ 30.00 M
vi) FURNACE BURNERS	\$ 3.00 M
vii) REFRIGERATION EQUIPMENT	\$ 30.00 M
viii) TEMP. CHANGE EQUIPMENT.	\$ 8.00 M
ix) FILTERING MACHINERY	\$ 10.00 M
x) MATERIALS HANDLING EQUIPMENT.	\$ 30.00 M

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

i) Project Name: C
Approximate Value: \$ M
Financing Source:
For further info. please contact:

Export and Investment Promotion Planning System

MISSION: 342 TEL AVIV

COUNTRY: 232 ISRAEL

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

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

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

- the apparent limited sectoral capability in Canada compared to other competing export countries
- other factor(s) described by the Trade Office as follows:

ALTHOUGH LIMITED, SUB-SECTOR CAPABILITY HAS NOT BEEN FULLY CONSIDERED PRIMARILY BECAUSE OF LONG STANDING IMAGE OF CANADA AS SUPPLIERS OF RAW MATERIALS, PRODUCTION INPUTS.

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

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- competitive export pricing for this market
- the availability of competitive Canadian financing

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

Activity: ANALYZE TOTAL IMPORTS THIS SUBSECTOR INTERMS OF CANADIAN CAPABILITY.

Results Expected: ESTABLISHED PRODUCT/SUPPLIER LIST.

Activity: CONTACT POTENTIAL SUPPLIERS - ADVISE CURRENT MARKET VOLUME FOR THEIR PRODUCTS. SOLICIT INTEREST IN THIS MARKET. REQUEST CATALOGUES, BROCHURES, VCR TAPES, OTHER MARKETING AIDS.

Results Expected: BASIS FOR IN-DEPTH MARKET PROMOTIONAL ACTIVITY.

Activity: CONTACT HEAD BUYERS, POTENTIAL AGENTS/DISTRIBUTORS - IDENTIFY CANADIAN SOURCEAS FOR SPECIFIC REQUIREMENTS. EVALUATE POTENTIAL REPS AND REPORT TO CANADIAN COMPANIES.

Results Expected: GREATER AWARENESS OF CANADIAN POTENTIAL NEW TRADE LINKS.

Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: AFRICA-MIDDLE-EAST

Mission: 342 TEL AVIV

Country: 232 ISRAEL

Highlights of Investment Environment

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

\$ 1 500.00 M

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

\$ 100.00 M

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

1. 577 UNITED STATES OF AMERICA	\$ 500.00 M	1. Corporations : 40.00 %
2. 609 EUROPEAN COMMON MARKET C	\$ 500.00 M	2. Institutional : 0.00 %
3.	\$. M	3. Entrepreneurs : 35.00 %
4.	\$. M	4. Immigrant Entr.: 25.00 %

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

- Emigration
- Corporate Search For Cheaper Production And/Or Operating Costs
Outside The Country
- Local Tax And Investment Climate Tends To Discourage Domestic Investment
- Corporate Expansion To Seek New Markets

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

-SECTOR(S)-

1. 013 CONSUMER PRODUCTS
2. 013 CONSUMER PRODUCTS
3. 012 PETROCHEM & CHEM PROD, EQP, SERV

-SUBSECTOR(S)-

- 132 JEWELERY & GIFTWARE
- 131 APPAREL (CLOTH, FUR, SHOES) TEXT
- 123 PLASTICS PRODUCTS, EQUIP, SERVIC

Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: AFRICA-MIDDLE-EAST

Mission: 342 TEL AVIV

Country: 232 ISRAEL

Equity Propensity Of Key Sources Of Investment From This Territory

Corporations : 100% Ownership Of Existing Corporate Facility
Institutional :
Entrepreneurs : Start-up Investment To Create New Enterprise (On A Joint Basis)
Immigrant Entr.: Start-up Investment To Create New Enterprise (100% Ownership)

Sector Preferences By Type Of Key Investors

Corporations : Manufacturing Industries
Institutional :
Entrepreneurs : Real-Estate
Immigrant Entr.: Manufacturing Industries

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

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

Reason(s):

IN ALL OF ABOVE FIELDS ISRAEL HAS 1ST CLASS TECHNOLOGY WHICH FIRMS WISH TO CONTRIBUTE IN RETURN FOR EQUITY IN NA JV SET UP TO PRODUCE & MARKET I.E. INVESTMENT BASED ON TECHNOLOGY TRANSFER.

Program Plans:

THIS PROGRAM IS SERVED BY OUR TECHNOLOGY INFLOW ACTIVITY WHICH IS LARGELY DEMAND DRIVE.

Anticipated Results: TWO JV'S

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

DATE: 88/01/25

DEPARTMENT OF EXTERNAL AFFAIRS

PAGE: 68c

Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: AFRICA-MIDDLE-EAST

Mission: 342 TEL AVIV

Country: 232 ISRAEL

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

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

Program Plans:
ASSISTANCE TO ENTREPRENEURIAL IMMIGRANTS.

Anticipated Results: 10 NEW SET-UPS

Sector : 001 AGRI & FOOD PRODUCTS & SERVICE
Subsector: 016 AGRICULTURE MACH, EQUIP, TOOLS

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

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 342 TEL AVIV		
Sector: 001 AGRI & FOOD PRODUCTS & SERVICE		
010 FAIRS AGRITECH	TEL AVIV	0989
024 MISSION INCOMING FARM EQUIPMENT MISSION	REGINA	0689
Sector: 014 EDUCATION, MEDICAL, HEALTH PROD		
010 FAIRS MEDAX	JERUSALEM	0590
Sector: 016 INDUSTRIAL MACHIN. PLANTS, SERV.		
010 FAIRS TECHNOLOGY '89	TEL AVIV	0589

Export and Investment Promotion Planning System

88/89 Trade and Economic Overview

Mission: 346 BAGHDAD

Country: 305 IRAQ

ALTHOUGH IRAQ CONTINUES TO WAGE THE SEVEN YEAR WAR WITH IRAN, ECONOMIC CONDITIONS IN IRAQ HAVE SHOWN A CONSIDERABLE IMPROVEMENT IN THE PAST YEAR, AND THE PROSPECTS FOR ADD'L RECOVERY & GROWTH APPEAR MUCH BETTER THAN IN '86. HOWEVER, THE MODEST RECOVERY EXPERIENCED BY THE IRAQI ECONOMY HAS NOT YET FULLY BEEN FELT IN THE TRADE SECTOR. IRAQ'S MAIN SOURCE OF FOREIGN REVENUE IS ITS EXPORT OF CRUDE PETROLEUM AND PRODS. IN '87 IRAQ HAS BEEN ABLE TO INCREASE ITS PROD'N CAPACITY BY WELL OVER 1 MN BARRELS PER DAY. CURRENTLY, IRAQ IS PRODUCING AT LEAST 2.7 MN BARRELS PER DAY OF WHICH ONLY 400,000 BARRELS PER DAY ARE CONSUMED LOCALLY. THIS INCREASE IN PROD'N COMBINED WITH A FIRING OF THE PRICE OF OIL TO AROUND US\$ 18 PER BARRELL HAS SIGNIFICANTLY IMPROVED IRAQ'S FOREIGN EXCHANGE EARNINGS. IN ADD'N TO INCREASED FOREIGN EXCHANGE EARNINGS, IRAQ HAS EFFECTIVELY REDUCED IMPORTS TO A LEVEL OF BETWEEN US\$7 TO 8 BN. THIS CONTRASTS WITH IRAQI IMPORTS OF OVER \$20 BN IN '81. DOMESTIC INFLATION COMBINED WITH A SCARCITY OF IMPORTED GOODS HAS DRASTICALLY AFFECTED THE STANDARD OF LIVING IN IRAQ, YET THROUGH A REDUCTION OF IMPORTS, IRAQ HAS BEEN ABLE TO IMPROVE ITS CURRENT ACCOUNT POSITION TO THE POINT WHERE IT MAY BE BALANCED BY EARLY '88. DURING '87 IRAQ HAS IMPROVED ITS PAYMENTS RECORDS. THIS HAS BEEN DONE IN A NUMBER OF AD HOC AND FORMAL WAYS. RESCHEDULING AGREEMENTS HAVE BEEN REACHED WITH MOST OF IRAQ'S MAJOR CREDITORS INCLUDING FRANCE AND ITALY. SMALLER AMOUNTS OWED ON UNPAID L/CS AND VARIOUS FINAL PAYMENTS OUTSTANDING FM CIVIL CONSTRUCTION & CAPITAL PROJECTS IN THE EARLY PART OF THE WAR HAVE BEEN SYSTEMATICALLY RESCHEDULED & CONSIDERABLE AMOUNTS HAVE BEEN PAID TO MANY COUNTRIES INCLUDING CDA. DESPITE THE MARGINAL IMPROVEMENT IN IRAQ'S RECORD, GIVEN THAT THE CONSIDERABLE GROSS NATIONAL DEBT IS STILL IN EXCESS OF US\$55 BN, IT IS NOT LIKELY THAT IRAQ WILL QUICKLY EMERGE FROM ITS DIFFICULTIES EXPERIENCED DURING THE CONDUCT OF THE WAR. AS AN EXAMPLE OF THIS, IRAQ CONTINUES TO INSIST ON DEFERRED TERMS FINANCING OF AT LEAST TWO YEARS. FOR PROJECT WORK, TERMS OF BETWEEN 5-10 YEARS ARE THE NORM. IT IS HOWEVER SIGNIFICANT THAT IRAQ HAS BEEN ABLE TO ATTRACT NEW CREDIT FROM MAJOR SUPPLIERS, THE MOST NOTABLE OF WHICH IS THE U.S. AT THE END OF '87, THE U.S. HAS ANNOUNCED APPROX. US\$940 MN WORTH OF CREDIT FOR SALES OF US AGRICULTURAL FOOD AND INDUSTRIAL COMMODITIES TO IRAQ. THIS CREDIT WAS MADE AVAILABLE IN PART AS A RECOGNITION OF IRAQ'S IMPROVED ECONOMIC PERFORMANCE. FOR CDA, '88 MAY PROVIDE UNIQUE OPPORTUNITIES. SOME FORM OF CANADIAN GOVERNMENT FINANCING WILL BE NECESSARY IN ORDER TO SECURE A SIGNIFICANT MARKET POSITION FOR CANADIAN EXPORTERS IN SECTORS OF LONG-TERM INTEREST TO CANADA E.G.: AUTOMOTIVE, TELECOMMUNICATIONS, OIL AND GAS EQUIPMENT, AND SERVICES.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 346 BAGHDAD

Market: 305 IRAQ

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

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

REASONS: INCREASED ACTIVITY OF CDN FIRMS SUCH AS SNVI & GMMD IN IRAQ COMBINED WITH IMPROVED PROSPECTS FOR FINANCING SALES BODES WELL FOR ALL CDN FIRMS. -ADD'L HARD CURRENCY EARNINGS BY IRAQ IN 88/89 & GOVT CONTINUED

2. 009 FOREST PRODUCTS, EQUIP, SERVICES

REASONS: IRAQI DEMAND FOR NEWSPRINT IS PARTICULARLY FIRM DURING WARTIME AT ABOUT 25,000 M. T./ANNUM. DUE TO HIGH INT'L DEMAND & TIGHT SUPPLIES, IRAQIS ARE FORCED TO PAY CASH - THIS WILL IMPROVE PROSPECTS FOR CDN.

3. 005 COMM. & INFORM. EQP. & SERV

REASONS: IRAQ'S PLANS STILL CALL FOR IMPLMTN OF AMBITIOUS \$2BN PUBLIC SWITCHING TELE. NETWORK BY YEAR 2000; IMPROVED STATE OF IRAQI ECONOMY MAY ALLOW SOME ADD'L SPENDING IN THIS SECTOR DURING COMING YEAR. -IMMINENT

4. 003 GRAINS AND OILSEEDS

REASONS: DEMAND FOR CEREALS IN IRAQ WILL REMAIN HIGH UNTIL SUCH TIME AS DOMESTIC PROD'N EFFICIENCY IMPROVES MARKEDLY. -DUE TO OUR LTA (ENTERING 3RD YEAR) CDA WILL REMAIN MAJOR SUPPLIER, HOWEVER IRAQIS WILL APPLY

5. 011 OIL & GAS EQUIPMENT, SERVICES

REASONS: WITH SIGNING OF US\$1.45 BN IPSA II PIPELINE CONTRACT, CDN OIL PIPELINE EQPT & SRVCS EXPRTS SHLD BE IN A GOOD POSITION TO WORK WITH MAJOR CONTRACTORS. -IN EXPLORATION FIELD, IRAQIS CONTINUING EXPLORATION APACE

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

1. 003 GRAINS AND OILSEEDS
2. 008 TRANSPORT SYS, EQUIP, COMP, SERV.
3. 009 FOREST PRODUCTS, EQUIP, SERVICES
4. 010 MINE, METAL, MINERAL PROD & SRV

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 346 BAGHDAD

Market: 305 IRAQ

Sector: 003 GRAINS AND OILSEEDS

Subsector: 031 CEREAL GRAINS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	280.00M	\$ 280.00M	\$ 300.00M	\$ 320.00M
Canadian Exports \$	80.00M	\$ 80.00M	\$ 93.00M	\$ 50.00M
Canadian Share of Import Market	29.00%	29.00%	31.00%	15.00%

Major Competing Countries

Market Share

- | | |
|----------------------------------|-------|
| i) 011 AUSTRALIA | 038 % |
| ii) 577 UNITED STATES OF AMERICA | 030 % |

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

Current status of Canadian exports: Mature with little growth

Products/services for which there are good market prospects

Current Total Imports In Canadian \$

i) RED SPRING WHEAT	\$ 190.00 M
ii) FLOUR	\$ 50.00 M
iii) MALTING BARLEY	\$ 50.00 M

- i) RED SPRING WHEAT
- ii) FLOUR
- iii) MALTING BARLEY

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

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

- non competitive financing from Canada
- other factor(s) described by the Trade Office as follows:
IRAGIS HAVE RECEIVED TRANSPORTATION CREDITS FROM USA & AUSTRALIA FOR GRAINS THEY BUY FROM THOSE COUNTRIES. THERE IS INCREASING PRESSURE FOR CANADA TO FOLLOW SUIT. IF IT CANNOT, CANADIAN SALES TO IRAG WILL BE HURT.

Export and Investment Promotion Planning System

MISSION: 346 BAGHDAD

COUNTRY: 305 IRAQ

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

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

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

Activity: ASSIST CANADIAN WHEAT BOARD IN ITS RELATIONS WITH IRAQI GRAIN BOARD IN THIRD YEAR OF CANADA-IRAQ LONG TERM AGREEMENT.

Results Expected: ENSURE SMOOTH RUNNING OF LTA AND ASSIST WHEN PAYMENTS TO CWB ARE DELAYED.

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

Activity: MONITOR STATUS OF TRANSPORTATION CREDITS GRANTED BY USA AND AUSTRALIA AND ADVISE CWB ABOUT RECOMMENDED CANADIAN POLICY.

Results Expected: HELP TO PROTECT SIZEABLE CANADIAN MARKET SHARE OF IRAQI GRAIN IMPORTS.

Activity: CO-ORDINATE NEW TRAINING ACTIVITIES OF CANADIAN INTERNATIONAL GRAINS INSTITUTE FOR IRAQI SPECIALISTS.

Results Expected: ENHANCE REPUTATION OF CANADA AS TECHNOLOGICALLY ADVANCED SUPPLIER OF HIGHEST QUALITY MILLING WHEAT.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 346 BAGHDAD

Market: 305 IRAQ

Sector: 003 GRAINS AND OILSEEDS

Subsector: 032 OILSEEDS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	250.00M	\$ 250.00M	\$ 230.00M	\$ 230.00M
Canadian Exports \$	0.00M	\$ 0.00M	\$ 0.00M	\$ 0.00M
Canadian Share of Import Market	0.00%	0.00%	0.00%	0.00%

Major Competing Countries

Market Share

- | | |
|---------------------|-------|
| i) 344 MALAYSIA | 000 % |
| ii) 431 PHILIPPINES | 000 % |
| iii) 206 INDIA | 000 % |

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

Current status of Canadian exports: No Export results to date

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) CANOLA SEED	\$ 0.00 M
ii) CANOLA OIL	\$ 0.00 M
iii) CANOLA MEAL	\$ 0.00 M

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

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

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- non competitive financing from Canada
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- difficulties in obtaining credit facilities in Canada
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters
- other factor(s) described by the Trade Office as follows:

POST HAS BEEN ADVISED BY CDN INDUSTRY THAT IRAQ & ARAB COUNTRIES ARE NOT PRIORITY MARKETS FOR CDN CANOLA BECAUSE PREVAILING FEAR IS THAT EUROPEAN RAPESEED PRODUCERS COULD DRASTICALLY CUT PRICES TO KEEP CANOLA OUT OF MARKET.

Export and Investment Promotion Planning System

MISSION: 346 BAGHDAD

COUNTRY: 305 IRAQ

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

- strong sectoral capability in Canada

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

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

Activity: CANOLA TECHNICAL AWARENESS SEMINARS (ORIGINALLY SCHEDULED FOR 1987/88 TO BE RESCHEDULED) CANADIAN INDUSTRY MUST BE CONVINCED OF ATTRACTIVENESS OF IRAQI AND ARAB MARKET.

Results Expected: IMPROVE ARAB AWARENESS OF TECHNICAL, NUTRITIONAL AND AGRICULTURAL MERITS OF GROWING AND CONSUMING CANADIAN CANOLA.

Activity: CONTINUE WORK WITH APPLIED AGRICULTURAL RESEARCH CENTRE AND COLLEGE OF AGRICULTURE, UNIVERSITY OF BAGHDAD, TO EXPAND FIELD TRIALS OF CANADIAN CANOLA CULTIVATED IN IRAQ.

Results Expected: PRELIMINARY RESULTS HAVE BEEN OUTSTANDING; IF EXPERIENCE CONTINUES, LARGE MARKET FOR CANOLA SEED COULD BE CREATED.

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

Activity: WORK WITH ARAB FEDERATION FOR FOOD INDUSTRIES TO INCREASE EXPOSURE TO CANADIAN TECHNOLOGY AND EXPERIENCE IN OILSEEDS AND OTHER FOOD AREAS.

Results Expected: WITH GREATER EXPOSURE, ARAB (AND IRAQI) FOOD INDUSTRIES ARE MORE LIKELY TO SEEK OUT CDN SOURCES OF SUPPLY.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 346 BAGHDAD

Market: 305 IRAQ

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

Subsector: 053 TELECOMMUNICATIONS (INC SPACE)

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	300.00M	\$ 300.00M	\$ 200.00M	\$ 200.00M
Canadian Exports \$	60.00M	\$ 1.60M	\$ 0.50M	\$ 0.10M
Canadian Share of Import Market	20.00%	0.01%	0.00%	0.00%

Major Competing Countries

Market Share

i) 128 GERMANY WEST	020 %
ii) 112 FRANCE	015 %
iii) 237 ITALY	015 %
iv) 265 JAPAN	015 %
v) 507 SWEDEN	010 %
vi) 032 HUNGARY	008 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) PUBLIC DIGITAL EXCHANGES	\$ 0.00 M
ii) PRIVATE DIGITAL EXCHANGES	\$ 0.00 M
iii) TELEPHONE EQUIPMENT	\$ 0.00 M
iv) CONVENTIONAL AND FIBRE OPTIC CABLES	\$ 0.00 M

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

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

Export and Investment Promotion Planning System

MISSION: 346 BAGHDAD

COUNTRY: 305 IRAQ

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

- non competitive financing from Canada
- difficulties in obtaining credit facilities in Canada
- other factor(s) described by the Trade Office as follows:

LACK OF CREDIT LINE/EXPORT INSURANCE COVER FOR IRAQ HAS HURT CANADIAN EXPORTS.

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

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

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

Activity: RENDER ASSISTANCE TO BELL CANADA INT'L IN FINAL STAGES OF CONTRACT NEGOTIATIONS FOR APPROX \$60 MILLION DEAL WITH IRAQI MINISTRY OF DEFENCE.

Results Expected: SUCCESSFUL CONCLUSION OF THIS DEAL WILL ALLOW BCI TO REOPEN LOCAL OFFICE AND PROVIDE NEEDED REVENUES TO REMAIN IN IRAQI MARKET.

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

Activity: SUPPORT ON-GOING ACTIVITIES OF BCI AFTER RE-ESTABLISHMENT OF LOCAL OFFICE IN LIAISON WITH M. O. D. AND PTT.

Results Expected: PROMOTE ADDITIONAL IRAQI INTEREST IN CANADIAN GOODS AND SERVICES.

Activity: ASSUMING BCI IS SUCCESSFUL IN OBTAINING SECTION 31 FINANCING, POST WILL COMMENCE MORE ACTIVE PROMOTION OF OTHER CANADIAN COMMUNICATIONS PRODUCTS IN IRAQ.

Results Expected: DEVELOP NEW PROJECTS/SUPPLY CONTRACTS WORTHY OF CANADIAN GOVERNMENT FINANCING.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 346 BAGHDAD

Market: 305 IRAQ

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

Subsector: 081 AUTOMOTIVE

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	600.00M	\$ 500.00M	\$ 500.00M	\$ 600.00M
Canadian Exports \$	45.00M	\$ 5.00M	\$ 7.00M	\$ 7.00M
Canadian Share of Import Market	7.50%	0.01%	0.01%	0.01%

Major Competing Countries

Market Share

i) 047 BRAZIL	025 %
ii) 265 JAPAN	020 %
iii) 128 GERMANY WEST	018 %
iv) 507 SWEDEN	015 %
v) 112 FRANCE	010 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are
good market prospects

Current Total Imports

	In Canadian \$
i) LIGHT TRUCKS	\$ 0.00 M
ii) SPARE PARTS	\$ 0.00 M
iii) AMBULANCES	\$ 0.00 M
iv) PASSENGER AUTOS	\$ 0.00 M
v) ACCESSORIES	\$ 0.00 M

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

i) Project Name: VARIOUS, PERIODIC CIRCULARS (TENDERS) FOR
VEHICLES AND SPARE PARTS.

Approximate Value: \$ 300 M

Financing Source: 012 DDM

For further info. please contact:
EMBASSY

Export and Investment Promotion Planning System

MISSION: 346 BAGHDAD

COUNTRY: 305 IRAQ

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

- there are import restrictions which can present significant problems
- exports of certain products or services to this country are subject to Canadian export controls

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

- non competitive financing from Canada
- difficulties in obtaining credit facilities in Canada
- other factor(s) described by the Trade Office as follows:

AVAILABILITY OF FINANCING IS KEY ISSUE IN THIS SECTOR. IF GENERAL MOTORS M.D. OF CANADA IS SUCCESSFUL IN ITS NEGOTIATIONS OVER FINANCING & BARTER, SALES WILL IMPROVE. OVERALL SUCCESS OF CDN EXPORTERS WILL ALSO DEPEND ON EXTENT OF IRAQI PRIVATIZATION & HARD

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

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

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

Activity: ASSISTANCE TO GENERAL MOTORS MARKET DEV. OF CDA LTD. IN THEIR DISCUSSIONS WITH IRAQI MINISTRY OF TRADE ON UMBRELLA AGREEMENT FOR FINANCING OF NEW SALES TO IRAQ INCLUDING OIL BARTER AS A FORM OF PAYMENT.

Results Expected: DEVELOP NEW SALES WHICH COULD REACH HUNDREDS OF MILLIONS OF DOLLARS.

Activity: ASSIST GMMD TO RECOVER APPROXIMATELY DLRS 8 MILLION STILL OWED TO ITS BANKERS FOR PREVIOUS SALES TO IRAQ.

Results Expected: BY RECOVERING OVERDUE PAYMENTS. HELP TO ENCOURAGE NEW FINANCING FOR GMMD SALES TO IRAQ BY PRIVATE COMMERCIAL INSTITUTIONS.

Activity: SUPPORT SNVI'S ACTIVITIES IN IRAQ & THEIR REQUEST FOR GOVERNMENT FINANCING FROM CANADA FOR THEIR CURRENT AND FUTURE SALES OF AMBULANCES.

Results Expected: COMPLETE CURRENT CONTRACT & ENHANCE PROSPECTS FOR ADDITIONAL SALE OF MORE THAN 500 AMBULANCES.

Export and Investment Promotion Planning System

MISSION: 346 BAGHDAD

COUNTRY: 305 IRAQ

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

Activity: WORK WITH PRIVATE IRAQI IMPORTERS OF AUTOMOTIVE PARTS TO HELP THEM SOURCE PRODUCTS IN CANADA AS THEIR RESPONSIBILITY FOR IMPORTS INCREASES AND ACCESS TO HARD CURRENCY IMPROVES.

Results Expected: SECURE A PLACE FOR CANADIAN EXPORTERS IN RAPIDLY EXPANDING IRAQI PRIVATE SECTOR FOR AUTOMOTIVE PARTS.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 346 BAGHDAD

Market: 305 IRAQ

Sector: 009 FOREST PRODUCTS, EQUIP, SERVICES

Subsector: 094 PULP AND PAPER PRODUCTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	40.00M	\$ 35.00M	\$ 35.00M	\$ 30.00M
Canadian Exports \$	25.00M	\$ 18.00M	\$ 4.70M	\$ 8.00M
Canadian Share of Import Market	62.50%	51.10%	13.40%	26.60%

Major Competing Countries

Market Share

i) 504 FINLAND	025 %
ii) 265 JAPAN	015 %
iii) 051 UNITED KINGDOM	010 %

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

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) NEWSPRINT	\$ 15.00 M
ii) PULP	\$ 0.00 M
iii) FINE PAPERS	\$ 10.00 M

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

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

- a lack of interest in the market on the part of Canadian exporters
- non competitive financing from Canada
- difficulties in obtaining credit facilities in Canada
- other factor(s) described by the Trade Office as follows:

FIRM DEMAND FM TRADITIONAL NORTH AMERICAN, EUROPEAN & ASIAN CUSTOMERS, COMBINED WITH HIGH PRICES & 98% PRODUCTION LEVELS HAVE MADE CDN NEWSPRINT PRODUCERS UNWILLING TO SEEK OUT NEW (AND WHAT THEY SEE AS) UNPREDICTABLE MARKETS SUCH AS IRAQ.

Export and Investment Promotion Planning System

MISSION: 346 BAGHDAD

COUNTRY: 305 IRAQ

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

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

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

Activity: ENSURE COMPLETE FULFILLMENT OF CONTRACT TO SUPPLY 22,000 M. T. OF NEWSPRINT BY INTERNATIONAL BOARD OF MARKETING ASSOCIATES(MONTREAL

Results Expected: IF CONTRACT IS SATISFACTORILY CONCLUDED, PROSPECTS FOR ADDITIONAL SALES FROM CANADA WILL BE EXCELLENT.

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

Activity: RECRUIT MAJOR CANADIAN NEWSPRINT PRODUCERS TO BID ON IRAQI 1988-89 REQUIREMENTS.

Results Expected: TOTAL IRAQI MARKET CAN BE SECURED FOR CDN PRODUCERS IF ONE OR MORE EXPORTERS WILLING TO SUPPLY IRAQ.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 346 BAGHDAD

Market: 305 IRAQ

Sector: 010 MINE, METAL, MINERAL PROD & SRV

Subsector: 102 MINERALS AND MINERAL PRODUCTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	150.00M	\$ 125.00M	\$ 100.00M	\$ 100.00M
Canadian Exports \$	12.00M	\$ 2.00M	\$ 1.50M	\$ 0.03M
Canadian Share of Import Market	0.08%	0.02%	1.50%	0.00%

Major Competing Countries

Market Share

i) 553 UNION OF SOVIET SOC REP	060 %
ii) 206 INDIA	025 %
iii) 192 PEOPLE'S REP OF CHINA	010 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

i) ASBESTOS FIBRES

In Canadian \$
\$ 15.00 M

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

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

- non competitive financing from Canada
- difficulties in obtaining credit facilities in Canada
- other factor(s) described by the Trade Office as follows:

IRAQ HAS TRADITIONALLY LOOKED TO THE USSR FOR ITS SUPPLY OF ASBESTOS. IT IS NOW READY TO PURCHASE INCREASING AMOUNTS FROM CANADA.

Export and Investment Promotion Planning System

MISSION: 346 BAGHDAD

COUNTRY: 305 IRAQ

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

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

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

Activity: ASSIST CANADIAN FIRM INTRAFINA OF MONTREAL TO OBTAIN NECESSARY PAYMENT TERMS (AND TO ENSURE FOLLOW-THROUGH) FOR ASBESTOS SALES.

Results Expected: EASE TRANSACTIONS AS QUANTITY OF ASBESTOS PURCHASED FROM CANADA INCREASES.

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

Activity: WORK WITH IRAQI OCCUPATIONAL HEALTH AUTHORITIES TO INCREASE KNOWLEDGE OF ASBESTOS HEALTH HAZARDS. IMPROVE HANDLING PROCEDURES

Results Expected: SAFER HANDLING OF ASBESTOS IN IRAQ WILL PRESERVE IRAQI MARKET WHILE OTHER INTERNATIONAL MARKETS FOR ASBESTOS DISAPPEAR.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 346 BAGHDAD

Market: 305 IRAQ

Sector: 011 OIL & GAS EQUIPMENT, SERVICES

Subsector: 116 MACHINERY AND EQUIPMENT

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1000.00M	\$ 350.00M	\$ 200.00M	\$ 150.00M
Canadian Exports \$	25.00M	\$ 0.50M	\$ 0.50M	\$ 0.00M
Canadian Share of Import Market	0.03%	0.00%	0.00%	0.00%

Major Competing Countries

Market Share

i) 237 ITALY	000 %
ii) 265 JAPAN	000 %
iii) 128 GERMANY WEST	000 %
iv) 577 UNITED STATES OF AMERICA	000 %
v) 112 FRANCE	000 %

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

Current status of Canadian exports: No Export results to date

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) EXPLORATION EQUIPMENT	\$ 0.00 M
ii) OIL WELL SERVICE EQ'T.	\$ 0.00 M
iii) PIPELINE EQUIPMENT	\$ 0.00 M
iv) NATURAL GAS RELATED EQ'T.	\$ 0.00 M

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

i) Project Name: IPSA II - IRAQI PIPELINE ACROSS SAUDI ARABIA

Approximate Value: \$ 2000 M

Financing Source: 012 DDM

For further info. please contact:

EMBASSY

Export and Investment Promotion Planning System

MISSION: 346 BAGHDAD

COUNTRY: 305 IRAQ

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

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

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

- a lack of interest in the market on the part of Canadian exporters
- non competitive financing from Canada
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- difficulties in obtaining credit facilities in Canada
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters
- other factor(s) described by the Trade Office as follows:

IRAQI MARKET FOR OIL & GAS EQUIP. HAS TRADITIONALLY BEEN DOMINATED BY FIRMS FROM COUNTRIES MENTIONED IN POINT 7-2; CANADIAN FIRMS HAVE NOT SERIOUSLY ATTEMPTED TO COMPETE OR TO SEEK OUT JOINT VENTURE PARTNERS.

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

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

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

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

Activity: AFTER RADICAL RESTRUCTURING OF IRAQI OIL MINISTRY AND AFFILIATED STATE COMPANIES, CONTINUE TO INVESTIGATE IMPORT REQUIREMENTS, AND PROMOTE CANADIAN CAPABILITY.

Results Expected: INCREASE INTEREST ON PART OF IRAQI IMPORTERS IN CDN PRODUCTS AS ALTERNATIVE TO GOODS TRADITIONALLY PURCHASED.

Activity: CONTINUE TO SUPPORT ACTIVITIES OF FIRMS SUCH AS CANUSA COATING SYSTEMS AND NOVACORP TO HELP THEM EXPAND PRODUCTIVE RELATIONSHIP WITH MAJOR CONTRACTORS AND SUPPLIERS IN FIELD.

Results Expected: ALLOW CANADIAN FIRMS TO IMPROVE THEIR CHANCES OF RECEIVING PAYMENT BY SELLING TO IRAQ VIA ESTABLISHED SUPPLIERS.

Export and Investment Promotion Planning System

MISSION: 346 BAGHDAD

COUNTRY: 305 IRAQ

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

Activity: INCREASE LIAISON WITH LOCAL OFFICES OF MAJOR FIRMS (I. E. SAIPEM, HYUNDAI, ENI, ETC) RECENTLY AWARDED IPSA II PIPELINE CONSTRUCTION PROJECT CONTRACT.

Results Expected: ENCOURAGE PRIME CONTRACTORS TO INCLUDE CDN GOODS AND SERVICES WHERE TECHNICALLY SUITABLE AND COMPETITIVE.

Export and Investment Promotion Planning System

88/89 Trade and Economic Overview

Mission: 347 RIYADH

Country: 322 SAUDI ARABIA

FOLLOWING 4 YEARS OF RECESSION, THERE ARE SIGNS THAT THE WORST IS OVER & THE SAUDI ECONOMY IS ABOUT TO TURN THE CORNER. AFTER A 10 MONTH HIATUS, THE GOVT PRODUCED A BUDGET IN LATE DEC. 1986 WHICH PROJECTED EXPENDITURES AT CDN \$60 BILLION, APPROXIMATELY THE SAME LEVEL AS THE PRECEDING YEAR. ALTHOUGH NO MAJOR NEW CAPITAL PROJ. WERE ANNOUNCED, CDN \$18 BILLION HAS BEEN EARMARKED FOR ONGOING PROJ & THE REPAYMENT OF OVERDUE ACCOUNTS. GROWING BUSINESS OPTIMISM IS EVIDENCED BY RENEWED ACTIVITY IN THE LOCAL STOCK MKT & THE NUMBER OF NEW APPLICATIONS SUBMITTED FOR INDUSTRIAL LICENCES. INVENTORIES HAVE BEEN REDUCED & CO ARE STARTING TO RESTOCK. THE PIVOTAL DEVELOPMENT IS THAT OIL PRICES HAVE STABILIZED AROUND US \$18 WITH THE PROSPECT OF FUTURE INCREASES. THIS IS CRITICAL SINCE OIL REVENUES DIRECTLY OR INDIRECTLY ACCOUNT FOR 60% OF GDP. REDUCING THE ECONOMY'S DEPENDENCE ON CRUDE OIL EXPORTS HAS BEEN ONE OF THE GOVT'S PRINCIPAL GOALS IN IMPLEMENTING ITS 4-5-YEAR DEVELOPMENT PLANS (1970-90). A SECOND MAJOR OBJECTIVE IS STRENGTHENING THE ROLE OF THE PRIVATE SECTOR. OVER THE PAST 15 YEARS, MASSIVE AMOUNTS OF MONEY HAVE BEEN SPENT INSTALLING THE INFRASTRUCTURE NEEDED TO ACCOMPLISH THESE GOALS. IMPRESSIVE RESULTS HAVE BEEN ACHIEVED. DURING THE 3-5-YEAR PLANS SPANNING THE PERIOD 1970-85, THE NON-OIL SECTOR GREW AT AN AVERAGE ANNUAL RATE OF 11%. 13 WORLD SCALE PETROCHEMICAL PLANTS HAVE COME ON STREAM & BY THE END OF THE 3RD PLAN, PRIVATE SECTOR OF GDP HAD GROWN TO 37%. SINCE 1982, HOWEVER, THE PRECIPITOUS DROP IN OIL REVENUE & THE COMPLETION OF MOST MAJOR INFRASTRUCTURE PROJ HAVE CAUSED A SHARP CONTRACTION IN THE ECONOMY, UNDERMINING BUSINESS CONFIDENCE & STALLING FURTHER DEVELOP. THE GOVT HAS TAKEN SEVERAL INITIATIVES TO REINVIGORATE THE ECONOMY. SPECIAL ATTENTION HAS BEEN FOCUSSED ON THE BANKING SECTOR TO MOBILIZE INVESTMENT CAPITAL & REMOVE IMPEDIMENTS TO DOMESTIC LENDING. NEW NON-OIL INVESTMENT IS BEING ENCOURAGED TO REPLACE IMPORTS & EXPAND EXPORTS OF DOWNSTREAM PETROCHEMICALS. FOREIGN PARTNERS ARE UNDER PRESSURE TO OFFSET MAJOR CONTRACT AWARDS WITH JOINT VENTURE INVESTMENTS IN HI-TECH INDUSTRIES. OIL REMAINS THE KEY. IF THE PRICE RECOVERY CONTINUES & PETROLEUM REVENUES INCREASE, THE ECONOMY WILL RESUME POSITIVE GROWTH, PROBABLY IN 1988. THE EXTRAVAGANCES OF THE BOOM YEARS ARE GONE FOREVER BUT MANY OBSERVERS SPEAK OF A BOOMLET EARLY IN THE NEXT DECADE. THE ADDITIONAL INCOME WILL BE USED TO BALANCE THE BUDGET, STRENGTHEN DEFENCE & SECURITY, & COMPLETE THE GOALS OF THE 4TH DEVELOP. PLAN (1985/90). OPPORTUNITIES FOR CDN EXPORTERS OF GOODS & SERVICES ARE BRIGHTEST IN THE FIELDS OF EDUCATION, HEALTHCARE, DEFENCE PROD., SPECIALIZED O&M, TELECOM, TRANSPORT., AGRIFOOD & SELECTED CONSUMER ITEMS. INVESTOR INTEREST IN CDA IS ALSO GROWING, SPARKED BY THE CDN ECONOMY'S RECENT PERFORMANCE & THE GOVERNMENT'S WELCOMING ATTITUDE.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 347 RIYADH

Market: 322 SAUDI ARABIA

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

1. 004 DEFENCE PROGRAMS, PRODUCTS, SERV

REASONS: DEFENCE SPENDING WILL REMAIN A TOP PRIORITY WORTH APPROXIMATELY \$15 BILLION ANNUALLY.

2. 005 COMM. & INFORM. EQP. & SERV

REASONS: NEWLY INSTALLED TELECOM INFRASTRUCTURE MUST BE MAINTAINED & EXPANDED INTO RURAL AREAS. INCREASED COMPUTERIZATION WILL UPGRADE SAUDI SKILLS AND DECREASE NEED FOR FOREIGN WORKERS.

3. 008 TRANSPORT SYS, EQUIP, COMP, SERV.

REASONS: NEW SAFETY STANDARDS AND SLOWER TURNOVER OF VEHICLES CREATES MARKET FOR SPARE PARTS SALES AND JOINT VENTURE MANUFACTURING.

4. 014 EDUCATION, MEDICAL, HEALTH PROD

REASONS: FOURTH DEVELOPMENT PLAN STRESSES HEALTH CARE SERVICES, TECHNICAL AND PROFESSIONAL TRAINING.

5. 001 AGRI & FOOD PRODUCTS & SERVICE

REASONS: DESPITE EFFORTS TO INCREASE SELF-SUFFICIENCY IMPORTS OF AGRICULTURE & FOOD PRODUCTS WILL CONTINUE IN THE MULTI-BILLION DOLLAR RANGE.

6. 011 OIL & GAS EQUIPMENT, SERVICES

REASONS: WITH OIL AND GAS INFRASTRUCTURE NOW COMPLETE, EMPHASIS IS ON MORE EFFICIENT OPERATIONS AND MAINTENANCE.

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

1. 005 COMM. & INFORM. EQP. & SERV
2. 003 GRAINS AND OILSEEDS
3. 008 TRANSPORT SYS, EQUIP, COMP, SERV.
4. 007 POWER & ENERGY EQUIP. & SERV.
5. 009 FOREST PRODUCTS, EQUIP, SERVICES
6. 012 PETROCHEM & CHEM PROD, EQP, SERV

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 347 RIYADH

Market: 322 SAUDI ARABIA

Sector: 001 AGRI & FOOD PRODUCTS & SERVICE

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	2500.00M	\$ 3500.00M	\$ 4259.00M	\$ 6205.00M
Canadian Exports \$	70.00M	\$ 83.00M	\$ 92.00M	\$ 105.00M
Canadian Share of Import Market	2.80%	2.30%	2.10%	1.70%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	035 %
ii) 354 NETHERLANDS	020 %
iii) 051 UNITED KINGDOM	015 %
iv) 112 FRANCE	012 %
v) 011 AUSTRALIA	010 %
vi) 128 GERMANY WEST	008 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) IMPLEMENTS	\$ 10.00 M
ii) SPARES	\$ 10.00 M
iii) FOOD	\$ 10.00 M
iv) SEMEN	\$ 1.00 M
v) FARM MANAGEMENT	\$ 2.00 M
vi) GREEN HOUSE TECH	\$ 5.00 M

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

i) Project Name: SPARE PARTS AND AGRI EQUIPMENT

Approximate Value: \$ 1 M

Financing Source: 012 DOM

For further info. please contact:

E. SALAMEH PHONE: 488-2288 TLX: 404893 DOMCAN SJ

Export and Investment Promotion Planning System

MISSION: 347 RIYADH

COUNTRY: 322 SAUDI ARABIA

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

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

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

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

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

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

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

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

- the adequacy of exporter information in Canadian Directories
- product/service information from Canadian companies

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

Activity: VISIT ON A REGULAR BASIS (TWICE PER YEAR) AGRICULTURAL AREAS (HA'IL, TABUK, GASSIM AND AL KHARJ).

Results Expected: RAISE AWARENESS AMONG MAJOR FARMS OF CANADIAN TECH. AND OBTAIN RFQS.

Activity: EXPLORE POTENTIAL FOR FAB A BEAN CANNING PLANT

Results Expected: JOINT VENTURE CARRING PLANT IN CANADA FOR EXPORT TO KINGDOM OF SAUDI ARABIA.

Export and Investment Promotion Planning System

MISSION: 347 RIYADH

COUNTRY: 322 SAUDI ARABIA

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

Activity: DEVELOP PROGRAMME OF SEMINARS WITH MINISTRY OF AGRICULTURE IN AREAS OF POTATOES ETC.

Results Expected: RAISE CANADIAN PROFILE IN MINISTRY.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 347 RIYADH

Market: 322 SAUDI ARABIA

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Subsector: 041 AEROSPACE & MARINE

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	2000.00M	\$ 2000.00M	\$ 4000.00M	\$ 500.00M
Canadian Exports \$	10.00M	\$ 6.00M	\$ 2.00M	\$ 3.50M
Canadian Share of Import Market	1.00%	1.00%	0.00%	1.00%

Major Competing Countries

Market Share

i) 051 UNITED KINGDOM	000 %
ii) 112 FRANCE	000 %
iii) 577 UNITED STATES OF AMERICA	000 %
iv) 354 NETHERLANDS	000 %
v) 128 GERMANY WEST	000 %

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

Current status of Canadian exports: No Export results to date

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) STOL AIRCRAFT	\$ 0.00 M
ii) REMOTE RECONNAISSANCE VEHICLE	\$ 0.00 M
iii) PILOT TRAINING	\$ 5.00 M
iv) WATER BOMBER	\$ 0.00 M
v) OVERHAUL OF RSAF ENGINES	\$ 5.00 M

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

i) Project Name: INVOLVE P&W CANADA IN MAINTENANCE AND OVERHAUL OF PT6 ON PILATUS

Approximate Value: \$ 2 M

Financing Source: 012 DOM

For further info. please contact:

J. P. MCLACHLAN TLX 404893 DOMCAN SJ FAX 488-0137

Export and Investment Promotion Planning System

MISSION: 347 RIYADH

COUNTRY: 322 SAUDI ARABIA

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

ii) Project Name: EXPLORE POSSIBILITIES FOR CANADIAN SUB-
CONTRACT WORK ON SUBMARINE PURCHASE CONT

Approximate Value: \$ M

Financing Source: 012 DOM

For further info. please contact:

J. P. MCLACHLAN TLX 404893 DOMCAN SJ FAX 488-0137

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

- exports of certain products or services to this country are subject to Canadian export controls
- the degree of import duty protection of local industry tends to be low

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

- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- other factor(s) described by the Trade Office as follows:
AEROSPACE AND NAVAL PURCHASES MADE ON SYSTEMS APPROACH. NEED TO LINK COMMERCIAL AND POLITICAL CONTACTS.

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

- No factors reported by mission

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

Activity: ENGINE OVERHAUL WORK FOR C-130 AND PILATUS (PT6)

Results Expected: PLACE CANADIAN SHOPS ON SECOND SOURCE LIST.

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

Activity: PURSUIT OF CANADIAN INVOLVEMENT IN AIRSTRIPS PROJECT.

Results Expected: SALE OF STOL AIRCRAFT AND AVIONICS.

Activity: ESTABLISH PROMOTION PROGRAM FOR CL1227

Results Expected: HAVE KSA DELEGATION VIEW DEMO IN CANADA.
ESTABLISH APPROPRIATE AGENT.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 347 RIYADH

Market: 322 SAUDI ARABIA

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Subsector: 042 ARMAMENTS & VEHICLES

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	750.00M	\$ 500.00M	\$ 100.00M	\$ 250.00M
Canadian Exports \$	50.00M	\$ 50.00M	\$ 0.00M	\$ 0.00M
Canadian Share of Import Market	6.00%	10.00%	0.00%	0.00%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	000 %
ii) 112 FRANCE	000 %
iii) 051 UNITED KINGDOM	000 %
iv) 047 BRAZIL	000 %
v) 026 AUSTRIA	000 %
vi) 499 SPAIN	000 %

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

Current status of Canadian exports: No Export results to date

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) ARMoured VEHICLES	\$ 0.00 M
ii) SPECIAL SERVICES VEHICLES	\$ 50.00 M

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

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

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

- the apparent limited sectoral capability in Canada compared to other competing export countries
- other factor(s) described by the Trade Office as follows:

THERE IS NEED FOR SENIOR HIGH LEVEL POLITICAL INVOLVEMENT FOR MAJOR SALES.

Export and Investment Promotion Planning System

MISSION: 347 RIYADH

COUNTRY: 322 SAUDI ARABIA

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

- No factors reported by mission

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

Activity: FINALIZE SALE OF PIRANHAS TO MINISTRY OF DEFENCE

Results Expected: \$50M COMPONENT FOR CANADA

Activity: KEEP MOWAG PROPOSAL ALIVE WITH NATIONAL GUARD PENDING BUDGET ALLOCATION

Results Expected: OBTAIN INVITATION FOR PRICING DISCUSSIONS

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

Activity: OBTAIN CANADIAN PARTICIPATION IN PROPOSAL TO RE-ENGINE ARMoured VEHICLES.

Results Expected: CANADIAN GROUP TO BID ON REFIT PROGRAM

Activity: RE-INTRODUCE ILITIS FOR NEW FORCES BEING ESTABLISHED.

Results Expected: HAVE ILITIS INVITED TO DEMONSTRATE.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 347 RIYADH

Market: 322 SAUDI ARABIA

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Subsector: 043 ELECTRICAL & ELECTRONIC

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	400.00M	\$ 300.00M	\$ 400.00M	\$ 500.00M
Canadian Exports \$	50.00M	\$ 10.00M	\$ 10.00M	\$ 0.00M
Canadian Share of Import Market	12.00%	3.00%	2.00%	0.00%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	000 %
ii) 112 FRANCE	000 %
iii) 051 UNITED KINGDOM	000 %
iv) 128 GERMANY WEST	000 %
v) 265 JAPAN	000 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) MILITARY COMMUNICATION NETWORKS	\$ 150.00 M
ii) NAVIGATION AIDS	\$ 20.00 M
iii) ATC TOWERS	\$ 5.00 M
iv) SARSAT - LUT	\$ 0.00 M
v) CRASH INDICATORS	\$ 0.00 M
vi) MICROWAVE LANDING SYSTEM	\$ 0.00 M
vii) STRATEGIC INSTALATION SECURITY SYSTEMS	\$ 400.00 M
viii) MAINTENANCE OF NAV AIDS	\$ 50.00 M

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

i) Project Name: KING FADH INT'L AIRPORT AIR TRAFFIC CONTROL SYSTEM

Approximate Value: \$ 200 M

Financing Source: 012 DOM

For further info. please contact:

J. P. MCLACHLAN TLX 404893 DOMCAN SJ FAX 488-0137

Export and Investment Promotion Planning System

MISSION: 347 RIYADH

COUNTRY: 322 SAUDI ARABIA

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

ii) Project Name: AL KHARJ AIRFORCE BASE NAV AIDS

Approximate Value: \$ 100 M

Financing Source: 012 DOM

For further info. please contact:

J. P. MCLACHLAN TLX 404893 DOMCAN SJ FAX 488-0137

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

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

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

- the apparent limited sectoral capability in Canada compared to other competing export countries
- other factor(s) described by the Trade Office as follows:
MAJOR SALES MUST BE POLITICALLY LINKED. SMALLER ITEMS NEED TO OBTAIN BLESSING OF EXPATRIATE ADVISORS WHO MAY FAVOUR OTHER COUNTRIES.

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

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

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

Activity: SUPPORT CANADIAN FIRMS REGISTERED AS SUB-SUPPLIERS TO ARMY AVIATION BASE.

Results Expected: \$10-20 MILLION SALES.

Activity: ENCOURAGE MDA TO DEMONSTRATE AIRBOURNE SAR.

Results Expected: OBTAIN INVITATION TO QUOTE A SYSTEM

Export and Investment Promotion Planning System

MISSION: 347 RIYADH

COUNTRY: 322 SAUDI ARABIA

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

Activity: PURSUE CANADIAN BIDDER FOR TAIF SECURITY SYSTEMS. INVOLVE CCC IF NECESSARY.

Results Expected: PERSUADE CANADIAN FIRM TO MAKE QUOTATION.

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

Activity: DETERMINE MARKET FOR ELECTRONIC WARFARE SIMULATION TRAINING.

Results Expected: PREPARE REPORT ON SIZE OF MARKET AND ENTRY POSSIBILITIES.

Activity: ENCOURAGE MID-SIZE CANADIAN FIRMS TO PARTICIPATE IN SMALLER SECURITY JOBS.

Results Expected: J-V BID BY ONE OF SEVERAL QUALIFIED CANADIAN GROUPS.

Activity: SUPPORT CANADIAN FIRMS TO MOVE INTO MAINTENANCE SECTOR FOR NAV AIDS.

Results Expected: J-V PARTICIPATION IN O&M CONTRACT AT AIRPORT.

Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights

Submitted by Posts by Region

Region: MIDDLE EAST

Mission: 347 RIYADH

Market: 322 SAUDI ARABIA

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

Subsector: 051 REMOTE SENSING

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	10.00M	\$ 50.00M	\$ 20.00M	\$ 10.00M
Canadian Exports \$	0.50M	\$ 2.00M	\$ 1.00M	\$ 0.00M
Canadian Share of Import Market	5.00%	4.00%	5.00%	0.00%

Major Competing Countries

Market Share

- i) 577 UNITED STATES OF AMERICA
- ii) 112 FRANCE

000 %
000 %

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

3-5 \$M

Current status of Canadian exports:

Mature with little growth

Products/services for which there are good market prospects

- i) ENHANCEMENT EQUIPMENT
- ii) TRAINING

Current Total Imports

In Canadian \$
\$ 20.00 M
\$ 2.00 M

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

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

- other factor(s) described by the Trade Office as follows:
PURCHASES MADE ON TRUNKEY BASIS. NO CANADIAN FIRMS OFFER FULL PACKAGE.

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

- No factors reported by mission

Export and Investment Promotion Planning System

MISSION: 347 RIYADH

COUNTRY: 322 SAUDI ARABIA

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

Activity: CONTINUE DISCUSSIONS WITH KACST REGARDING CANADIAN TRAINING OF TECHNICIANS AND MAPPERS.

Results Expected: TRAINEE PLACEMENTS IN CANADA

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

Activity: PROMOTE NEW ENHANCEMENTS ONCE MAJOR FACILITY COMPLETE AT KACST.

Results Expected: GENERATE REQUESTS FOR BUDGETARY PROPOSALS.

Activity: PURSUE WITH MEPA USE OF CANADIAN EQUIPMENT FOR POLLUTION MONITORING.

Results Expected: OBTAIN INVITATION FOR PROPOSAL.

Activity: MEET WITH DIRECTORS TO DETERMINE WHETHER THERE IS SUPPORT FOR SYNTHETIC APETURE RADAR CAPABILITY.

Results Expected: ESTABLISH WHETHER THIS WILL BE NEW AREA OF KACST ACTIVITY.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 347 RIYADH

Market: 322 SAUDI ARABIA

Sector: 005 COMM. & INFORM. EGP. & SERV

Subsector: 053 TELECOMMUNICATIONS (INC SPACE)

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	500.00M	\$ 500.00M	\$ 600.00M	\$ 700.00M
Canadian Exports \$	150.00M	\$ 200.00M	\$ 270.00M	\$ 270.00M
Canadian Share of Import Market	30.00%	40.00%	45.00%	39.00%

Major Competing Countries

Market Share

i) 507 SWEDEN	000 %
ii) 265 JAPAN	000 %
iii) 354 NETHERLANDS	000 %
iv) 577 UNITED STATES OF AMERICA	000 %

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

Current status of Canadian exports: Mature with little growth

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) PACKET SWITCHING EQUIP.	\$ 0.00 M
ii) TEST EQUIPMENT	\$ 30.00 M
iii) PABX	\$ 70.00 M
iv) RURAL SUBSCRIBER RADIO	\$ 20.00 M
v) MODEMS	\$ 10.00 M
vi) COMMUNICATIONS TOWERS	\$ 10.00 M

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

i) Project Name: TELEX O&M CONTRACT

Approximate Value: \$ 100 M

Financing Source: 012 DOM

For further info. please contact:

J. P. MCLACHLAN TLX 404893 DOMCAN SJ FAX 488-0137

Export and Investment Promotion Planning System

MISSION: 347 RIYADH

COUNTRY: 322 SAUDI ARABIA

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

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

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

- a lack of interest in the market on the part of Canadian exporters
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters
- other factor(s) described by the Trade Office as follows:
NOT ALL CANADIAN PRODUCTS CONFORM TO CCITT SPECIFICATIONS.

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

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

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

Activity: SUPPORT EFFORTS BY BELL CANADA INTERNATIONAL TO RENEW ADVISORY CONTRACT TO SAUDI TELECOM.

Results Expected: SIGNING OF CONTRACT.

Activity: SUPPORT SR TELECOM PROPOSALS FOR RURAL RADIO SYSTEM.

Results Expected: SALE OF FIRST SRT SYSTEM TO PTT.

Activity: CONTINUE SUPPORT FOR SPECTRUM MANAGEMENT PROPOSAL AT PTT.

Results Expected: OBTAIN CONTRACT.

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

Activity: ESTABLISH STRONG AGENTS FOR PAQUET SWITCH MANUFACTURER.

Results Expected: SALES IN 1989 WHEN SERVICE INTRODUCED.

Export and Investment Promotion Planning System

MISSION: 347 RIYADH

COUNTRY: 322 SAUDI ARABIA

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

Activity: INTRODUCE CANADIAN TEST EQUIPMENT.

Results Expected: ESTABLISH LOCAL AGENTS.

Activity: ESTABLISH DEMO SYSTEM FOR CANADIAN SATELLITE COMMUNICATIONS.

Results Expected: OBTAIN REQUEST TO BID PROPOSED MFA LINK.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 347 RIYADH

Market: 322 SAUDI ARABIA

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

Subsector: 054 COMPUTERS, SOFTWARE & SYSTEMS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	300.00M	\$ 300.00M	\$ 250.00M	\$ 200.00M
Canadian Exports \$	10.00M	\$ 10.00M	\$ 5.00M	\$ 5.00M
Canadian Share of Import Market	3.00%	3.00%	2.00%	3.00%

Major Competing Countries	Market Share
i) 577 UNITED STATES OF AMERICA	000 %
ii) 265 JAPAN	000 %
iii) 189 HONG KONG	000 %
iv) 434 TAIWAN	000 %
v) 112 FRANCE	000 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) ENGLISH/ARABIC SOFTWARE	\$ 5.00 M
ii) PERSONNEL SERVICES	\$ 20.00 M
iii) THRU J-V FACILITIES MANAGEMENT	\$ 20.00 M
iv) ENGLISH ARABIC HARDWARE	\$ 50.00 M

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

i) Project Name: SAUDI ARABIAN MONETARY AUTHORITY -
COMPUTER PROJECT

Approximate Value: \$ 25 M

Financing Source: 012 DOM

For further info. please contact:

J. P. MCLACHLAN TLX 404893 DOMCAN SJ FAX 488-0137

ii) Project Name: AL RADJI BANK COMPUTER PROJECT

Approximate Value: \$ 25 M

Financing Source: 012 DOM

For further info. please contact:

J. P. MCLACHLAN TLX 404893 DOMCAN SJ FAX 488-0137

Export and Investment Promotion Planning System

MISSION: 347 RIYADH

COUNTRY: 322 SAUDI ARABIA

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

iii) Project Name: STORAGE OF ARCHIVE MATERIAL MINISTRY OF FINANCE

Approximate Value: \$ 10 M

Financing Source:

For further info. please contact:

J. P. MCLACHLAN TLX 404893 DOMCAN SJ FAX 488-0137

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

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

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

- other factor(s) described by the Trade Office as follows:
ASIAN PRICING OF HARDWARE PRECLUDES ANYTHING OTHER THAN SPECIALITY EQUIPMENT. CONSULTING SERVICES MUST BE OFFERED ON J-V BASIS.

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

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

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

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

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

Activity: SUPPORT BCI OFFER ON MACHINE READABLE PASSPORTS.

Results Expected: RECEIVE INVITATION FOR FINANCIAL PROPOSAL.

Activity: SUPPORT SUPPLEMENTAL SALES OF BILINGUAL TERMINALS TO NATIONAL INFORMATION CENTRE.

Results Expected: FURTHER SALE HUNDRED UNITS.

Export and Investment Promotion Planning System

MISSION: 347 RIYADH

COUNTRY: 322 SAUDI ARABIA

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

Activity: INTRODUCE CANADIAN SOFTWARE MANAGEMENT FIRMS TO MARKET.

Results Expected: ESTABLISH CANADIAN-SAUDI JOINT VENTURE.

Activity: ORGANIZE CANADIAN COMPUTER SPECIALISTS GROUP IN KINGDOM.

Results Expected: IMPROVE INTELLIGENCE ON AND RESPONSE TO UPCOMING COMPUTER PROJECTS.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 347 RIYADH

Market: 322 SAUDI ARABIA

Sector: 007 POWER & ENERGY EQUIP. & SERV.

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1596.00M	\$ 1463.00M	\$ 1330.00M	\$ 1850.00M
Canadian Exports \$	28.00M	\$ 25.00M	\$ 23.00M	\$ 15.00M
Canadian Share of Import Market	1.80%	1.70%	1.70%	0.80%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	025 %
ii) 265 JAPAN	020 %
iii) 128 GERMANY WEST	015 %
iv) 052 ENGLAND	014 %
v) 112 FRANCE	010 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are
good market prospects

Current Total Imports

	In Canadian \$
i) SWITCH GEAR	\$ 40.00 M
ii) CONTROL SYSTEMS	\$ 30.00 M
iii) MANAGEMENT SERVICES	\$ 15.00 M
iv) LIGHTING	\$ 10.00 M
v) TRAINING	\$ 5.00 M

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

- i) Project Name: SCECO CENTRAL CONTROL CENTER
Approximate Value: \$ 30 M
Financing Source: 025 OTHER
For further info. please contact:
A. GRIFFITH PHONE: 488-2288 TLX: 404893 DOMCAN
- ii) Project Name: GCC POWER GRID PROJECT MANAGEMENT
Approximate Value: \$ 20 M
Financing Source: 025 OTHER
For further info. please contact:
A. GRIFFITH PHONE: 488-2288 TLX: 404893 DOMCAN

Export and Investment Promotion Planning System

MISSION: 347 RIYADH

COUNTRY: 322 SAUDI ARABIA

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

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

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

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

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

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

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

Activity: DEVELOP SCECO CENTRAL TRAINING PROGRAMS WITH ONTARIO HYDRO.

Results Expected: PLACE SAUDIS IN CANADA FOR TECHNICAL AND MANAGEMENT TRAINING.

Activity: DEVELOP CONTACTS AT OTHER ELECTRICAL UTILITIES.

Results Expected: PLACE SAUDIS IN CANADA FOR TECHNICAL AND MANAGEMENT TRAINING.

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

Activity: TOUR NORTHERN ELECTRICAL UTILITIES.

Results Expected: RAISE INTEREST IN CANADIAN PRODUCTS AND SERVICES. INTEREST REGIONAL UTILITIES IN TRAINING.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 347 RIYADH

Market: 322 SAUDI ARABIA

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

Subsector: 081 AUTOMOTIVE

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1428.00M	\$ 1714.00M	\$ 2142.00M	\$ 3200.00M
Canadian Exports \$	9.00M	\$ 11.00M	\$ 21.00M	\$ 52.00M
Canadian Share of Import Market	0.60%	0.60%	1.00%	1.60%

Major Competing Countries

Market Share

i) 265 JAPAN	042 %
ii) 577 UNITED STATES OF AMERICA	023 %
iii) 128 GERMANY WEST	020 %
iv) 616 OTHER COUNTRIES	014 %
v) 075 CANADA	001 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) TIRES	\$ 3.60 M
ii) AUTOMOTIVE PARTS	\$ 2.80 M
iii) BATTERIES	\$ 1.90 M

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

i) Project Name: HEAVY DUTY TRUCKS/PARTS

Approximate Value: \$ 25 M

Financing Source:

For further info. please contact:

JOE FAKHRI TEL: 488-2288 CDN EMB., RIYADH TLX: 404893

ii) Project Name: UTILITY TRUCKS/EQUIPMENT

Approximate Value: \$ 10 M

Financing Source:

For further info. please contact:

JOE FAKHRI TEL: 488-2288 CDN EMB., RIYADH TLX: 404893

Export and Investment Promotion Planning System

MISSION: 347 RIYADH

COUNTRY: 322 SAUDI ARABIA

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

iii) Project Name: GARAGE/SERVICE EQUIPMENT

Approximate Value: \$ 5 M

Financing Source:

For further info. please contact:

JOE FAKHRI TEL: 488-2288 CDN EMB., RIYADH TLX: 404893

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

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

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

- a lack of interest in the market on the part of Canadian exporters
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

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

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

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

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

Activity: ESTABLISHMENT OF CANADIAN/SAUDI AUTO PARTS DISTRIBUTION CENTER.

Results Expected: CDN AUTO PARTS SALES OF \$20-\$30 MILLION.

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

Activity: ASSIST IN ESTABLISHING CDN/SAUDI AUTOPARTS MANUFACTURING JOINT VENTURE; INVOLVING SEVERAL SAUDI/CDN COMPANIES.

Results Expected: ESTABLISHMENT OF CDN/SAUDI JOINT VENTURE.

Export and Investment Promotion Planning System

MISSION: 347 RIYADH

COUNTRY: 322 SAUDI ARABIA

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

Activity: PROMOTE CDN GARAGE/SERVICE EQUIPMENT. MEET SENIOR MANAGERS TO INTEREST THEM IN CANADIAN PRODUCT AND INVITE THEM TO ATTEND THE AIA SHOW IN MONTREAL 1988.

Results Expected: ESTABLISH 3 NEW AGENCIES/DISTRIBUTOR-SHIPS

Activity: INTRODUCE CDN UTILITY TRUCKS TO MAJOR SAUDI DISTRIBUTORS. IDENTIFY MAJOR PROJECTS IN COMING F/Y AND ADVISE CDN COMPANIES OF PROJECTS

Results Expected: INCREASE THE ASSOCIATION OF CDN/SAUDI FIRMS FOR JOINT BIDS.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 347 RIYADH

Market: 322 SAUDI ARABIA

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

Subsector: 085 AEROSPACE

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	70.00M	\$ 70.00M	\$ 100.00M	\$ 1000.00M
Canadian Exports \$	15.00M	\$ 5.00M	\$ 3.60M	\$ 4.00M
Canadian Share of Import Market	0.00%	0.00%	0.00%	0.00%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	000 %
ii) 112 FRANCE	000 %
iii) 051 UNITED KINGDOM	000 %
iv) 499 SPAIN	000 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) COMMUTER AIRCRAFT	\$ 0.00 M
ii) PRIVATE AIRCRAFT	\$ 100.00 M
iii) AIRCRAFT REFINITS	\$ 50.00 M
iv) FLYING SERVICES	\$ 10.00 M

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

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

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

POOR AGENT SELECTION INITIALLY SET BACK PROMOTION

Export and Investment Promotion Planning System

MISSION: 347 RIYADH

COUNTRY: 322 SAUDI ARABIA

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

- No factors reported by mission

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

Activity: PURSUE DISCUSSIONS BETWEEN AVELEX AND ARABASCO FOR AGENCY AGREEMENT.

Results Expected: FLOW THROUGH ENGINE COMPONENT WORK FOR AVELEX

Activity: PRESS FOR FORMAL SUBMISSION TO SAUDI OF DASH 8 AIRCRAFT FOR REGIONAL SERVICE.

Results Expected: RECEIVE REQUEST FOR FINANCIAL PROPOSAL

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

Activity: PURSUE WITH AGRICULTURAL CORPORATIONS USE OF LIGHT AIRCRAFT FOR CROP SPRAYING.

Results Expected: LIGHT AIRCRAFT DEMONSTRATION

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 347 RIYADH

Market: 322 SAUDI ARABIA

Sector: 010 MINE, METAL, MINERAL PROD & SRV

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	290.00M	\$ 265.00M	\$ 320.00M	\$ 600.00M
Canadian Exports \$	3.00M	\$ 2.00M	\$ 2.00M	\$ 4.00M
Canadian Share of Import Market	1.00%	0.70%	0.60%	0.70%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	025 %
ii) 265 JAPAN	015 %
iii) 128 GERMANY WEST	009 %
iv) 112 FRANCE	008 %
v) 237 ITALY	006 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) MINING SERVICES	\$ 100.00 M
ii) ASBESTOS	\$ 3.00 M
iii) SPECIAL STEEL	\$ 20.00 M

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

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

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

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

Export and Investment Promotion Planning System

MISSION: 347 RIYADH

COUNTRY: 322 SAUDI ARABIA

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

- support provided by the PEMD program
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada

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

Activity: FOLLOW UP MEETING OF JEC TECHNICAL SUBCOMMITTEE TO IDENTIFY SPECIFIC OPPORTUNITIES FOR COOPERATION IN THE MINING SECTOR.

Results Expected: IDENTIFY OPPORTUNITIES FOR PLACEMENT OF PUBLIC AND/OR PRIVATE SECTOR EXPERTS WITH DGMR.

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

Activity: DEVELOP LIST OF POTENTIAL JV PARTNERS FOR MINING PROJECTS.

Results Expected: FACILITATE CANADIAN INVESTMENT IN MINING SECTOR.

Activity: WORK WITH MINERAL RESOURCES DIRECTORATE TO IDENTIFY AND FACILITATE RECRUITMENT OF CANADIAN CONSULTANTS TO ASSIST REORGANIZATION OF DGMR.

Results Expected: RECRUITMENT OF CANADIAN CONSULTANTS TO WORK IN DGMR.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 347 RIYADH

Market: 322 SAUDI ARABIA

Sector: 011 OIL & GAS EQUIPMENT, SERVICES

Subsector: 116 MACHINERY AND EQUIPMENT

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1200.00M	\$ 1267.00M	\$ 1497.00M	\$ 2124.00M
Canadian Exports \$	20.00M	\$ 17.00M	\$ 15.00M	\$ 13.00M
Canadian Share of Import Market	1.70%	1.30%	1.00%	0.60%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	030 %
ii) 265 JAPAN	020 %
iii) 051 UNITED KINGDOM	010 %
iv) 128 GERMANY WEST	010 %
v) 112 FRANCE	005 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) MAINTENANCE SERVICES	\$ 50.00 M
ii) SCADA SYSTEMS	\$ 50.00 M
iii) EXPLORATION SOFTWARE	\$ 10.00 M
iv) SUNDRY SUPPLIES	\$ 30.00 M

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

i) Project Name: IPSA II PIPELINE (IRAQ-SAUDI LINE)
Approximate Value: \$ 1000 M
Financing Source: 020 IFED
For further info. please contact:
BAGHDAD PHONE: 542-1459 TLX: 212486

ii) Project Name: COMPLETION OF GAS COLLECTION SYSTEM.
(FLUOR SUB-CONTRACT)
Approximate Value: \$ 100 M
Financing Source: 025 OTHER
For further info. please contact:
A. GRIFFITH PHONE: 488-2288 TLX: 404893 DOMCAN SJ

Export and Investment Promotion Planning System

MISSION: 347 RIYADH

COUNTRY: 322 SAUDI ARABIA

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

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

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

- a lack of interest in the market on the part of Canadian exporters
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- non-tariff protectionist measures which are difficult to overcome

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

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

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

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

Activity: URGE ALBERTA GOVERNMENT TO INVITE AGENTS TO TRADE SHOWS IN CANADA

Results Expected: DEVELOP DIRECT CONTACTS BETWEEN CANADIAN AND SAUDI FIRMS.

Activity: CONVINCE CANADIAN PIPELINE TECHNICAL COMPANIES TO BE MORE AGRES-SIVE.

Results Expected: SALE OF SCADA AND OTHER PIPELINE TECHNOLOGIES

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

Activity: DELEGATION OF AGENTS TO NPC IN CALGARY, JUNE 88.

Results Expected: IDENTIFY AND SEND SAUDI REPS TO NPC '88.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 347 RIYADH

Market: 322 SAUDI ARABIA

Sector: 014 EDUCATION, MEDICAL, HEALTH PROD

Subsector: 142 HOSP. & MEDICAL EQUIP, INSTRUM.

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	265.00M	\$ 275.00M	\$ 280.00M	\$ 279.30M
Canadian Exports \$	2.00M	\$ 1.50M	\$ 0.50M	\$ 0.30M
Canadian Share of Import Market	0.70%	0.50%	0.10%	0.10%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	040 %
ii) 128 GERMANY WEST	020 %
iii) 434 TAIWAN	010 %
iv) 237 ITALY	007 %
v) 265 JAPAN	008 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) MEDICAL DISPOSABLES	\$ 48.10 M
ii) PORTABLE EQUIPMENT	\$ 20.20 M
iii) HOSPITAL FURNITURE	\$ 19.10 M
iv) LABORATORY EQUIPMENT	\$ 10.00 M

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

i) Project Name: KING FAHAD MEDICAL CITY, RIYADH

Approximate Value: \$ 150 M

Financing Source: 012 DOM

For further info. please contact:

L. J. FRECHETTE TEL: 488-2288 CDN EMB. RYADH404893

ii) Project Name: KING FAISAL UNIVERSITY HOSPITAL JEDDAH

Approximate Value: \$ 100 M

Financing Source: 012 DOM

For further info. please contact:

L. J. FRECHETTE TEL: 4882288 CDN EMB. RIYADH404893

Export and Investment Promotion Planning System

MISSION: 347 RIYADH

COUNTRY: 322 SAUDI ARABIA

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

iii) Project Name: PROJECT JOINT VENTURE WITH MAJOR OXYGEN MANUFACTURER IN DHAHRAN

Approximate Value: \$ 25 M

Financing Source: O12 DOM

For further info. please contact:

L. J. FRECHETTE TEL: 4882288 CDN EMB. RIYADH404893

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

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

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

- a lack of interest in the market on the part of Canadian exporters
- the apparent limited sectoral capability in Canada compared to other competing export countries

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

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

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

Activity: BUILD ON RECENTLY CONCLUDED AGENCY AGREEMENTS TO INTRODUCE FURTHER CANADIAN EXPERTISE IN SAUDI.

Results Expected: 2 - 3 NEW AGENCY AGREEMENTS.

Activity: ARRANGE FOR CANADIAN COMPANIES TO BE INVITED TO PARTICIPATE IN GOVERNMENT AND PRIVATE HOSPITAL TENDERS FOR MEDICAL EQUIPMENT (KING FAISAL UNIV. JEDDAH).

Results Expected: 2 -3 AGENCY AGREEMENTS WITH SAUDI COMPANIES.

Export and Investment Promotion Planning System

MISSION: 347 RIYADH

COUNTRY: 322 SAUDI ARABIA

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

Activity: INTRODUCE CANADIAN EXPERTISE TO AUTHORITIES RESPONSIBLE FOR THE SETTING UP OF KING FAHAD MEDICAL CITY IN RIYADH.

Results Expected: ALLOW CDN COMPANIES TO PARTICIPATE TO THE UPCOMING TENDERS.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 347 RIYADH

Market: 322 SAUDI ARABIA

Sector: 014 EDUCATION, MEDICAL, HEALTH PROD

Subsector: 143 EDUCATIONAL SERVICES, EQUIPMENT

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	290.00M	\$ 280.00M	\$ 320.00M	\$ 360.00M
Canadian Exports \$	0.90M	\$ 0.80M	\$ 0.70M	\$ 0.40M
Canadian Share of Import Market	0.30%	0.20%	0.20%	0.10%

Major Competing Countries

Market Share

i) 051 UNITED KINGDOM	039 %
ii) 577 UNITED STATES OF AMERICA	025 %
iii) 112 FRANCE	006 %
iv) 128 GERMANY WEST	006 %
v) 512 SWITZERLAND	005 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) TRNG OF SAUDIS IN CDA	\$ 1.00 M
ii) SET UP TRNG INSTITUTION	\$ 15.00 M
iii) LAB EQUIPMENT	\$ 85.00 M
iv) TEXT BOOKS	\$ 18.00 M
v) TEACHING AIDS	\$ 18.00 M

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

i) Project Name: JUBAIL POLYTECHNICAL INSTITUTE

Approximate Value: \$ 25 M

Financing Source: 012 DOM

For further info. please contact:

L. J. FRECHETTE-TEL: 488-2288 TLX: 404893 DOMCAN SJ

ii) Project Name: VOCATIONAL TRAINING IN CANADA

Approximate Value: \$ 2 M

Financing Source: 012 DOM

For further info. please contact:

L. J. FRECHETTE-TEL: 488-2288 TLX: 404893 DOMCAN SJ

Export and Investment Promotion Planning System

MISSION: 347 RIYADH

COUNTRY: 322 SAUDI ARABIA

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

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

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

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- the apparent limited sectoral capability in Canada compared to other competing export countries
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

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

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

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

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

Activity: BUILD UPON CURRENT TRAINING MEDICAL STAFF IN CANADA

Results Expected: INCREASE AMOUNT OF TRAINEES UP TO 1,000 BY 1990

Activity: ARRANGE VISIT OF RYERSON TO PURSUE FURTHER POLYTECHNICAL INSTITUTE PLANNED BY ROYAL COMMISSION JUBAIL AND YANBU

Results Expected: ESTABLISHMENT OF POLYTECHNICAL INSTITUTE UNDER RYERSON SUPERVISION

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

Activity: INTRODUCE CANADIAN MANAGEMENT CAPABILITIES TO SAUDI HEALTH AUTHORITIES.

Results Expected: TO ENABLE CDN COS TO BID ON MOH AND OTHER PUBLIC AND PRIVATE HOSPITALS.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 347 RIYADH

Market: 322 SAUDI ARABIA

Sector: 014 EDUCATION, MEDICAL, HEALTH PROD

Subsector: 144 SERVICES INCLUDING CONSULTING

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	500.00M	\$ 582.00M	\$ 648.00M	\$ 720.00M
Canadian Exports \$	9.00M	\$ 9.00M	\$ 5.00M	\$ 0.00M
Canadian Share of Import Market	1.80%	1.50%	0.77%	0.00%

Major Competing Countries

Market Share

- | | |
|---------------------------------|-------|
| i) 577 UNITED STATES OF AMERICA | 030 % |
| ii) 051 UNITED KINGDOM | 020 % |
| iii) 026 AUSTRIA | 010 % |

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

- | | In Canadian \$ |
|-------------------------------|----------------|
| i) HOSPITAL MANAGEMENT | \$ 400.00 M |
| ii) LABORATORY MANAGEMENT | \$ 28.00 M |
| iii) O & M. FOR MEDICAL EQPT. | \$ 20.00 M |

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

- i) Project Name: FEASIBILITY STUDY FOR SAUDI AIRLINE HOSPITALS

Approximate Value: \$ 150 M

Financing Source: 012 DOM

For further info. please contact:

L. J. FRECHETTE TEL: 488-2288 TLX: 404893 DOMCAN

- ii) Project Name: TURNKEY PROJECT FOR 3 HOSPITALS IN JEDDAH KING FAISAL UNIT

Approximate Value: \$ 250 M

Financing Source: 012 DOM

For further info. please contact:

L. J. FRECHETTE TEL: 488-2288

Export and Investment Promotion Planning System

MISSION: 347 RIYADH

COUNTRY: 322 SAUDI ARABIA

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

iii) Project Name: SET UP 31 TRAINING INSTITUTES FOR MEDICAL STAFF

Approximate Value: \$ 31 M

Financing Source: 012 DOM

For further info. please contact:

L. J. FRECHETTE TEL: 488-2288

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

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

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

- a lack of interest in the market on the part of Canadian exporters
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

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

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

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

Activity: PROMOTE CANADIAN EXPERTISE IN O. & M. OF MEDICAL EQUIPMENT IN KSA

Results Expected: OBTAIN FROM MOH HOSPITAL MANAGEMENT AN O. & M CONTRACT IN KINGDOM IN ASSOCIATION WITH LOCAL CO.

Activity: LOBBY KSA AUTHORITIES TO INVITE CDN COMPANIES TO PARTICIPATE IN MEDICAL TRAINING PROJECTS OF MOH.

Results Expected: TWO INVITATIONS TO BID.

Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: AFRICA-MIDDLE-EAST

Mission: 347 RIYADH

Country: 322 SAUDI ARABIA

Highlights of Investment Environment

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

\$ 800.00 M

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

\$ 1 000.00 M

Country Destinations Of Direct Equity Investment From Post Territory	Estm. Value \$ CDN	% Of Annual Direct Equity Investment Outflows By Category Of Investors
1. 577 UNITED STATES OF AMERICA	\$ 10 000.00 M	1. Corporations : 10.00 %
2. 051 UNITED KINGDOM	\$ 3 000.00 M	2. Institutional : 25.00 %
3. 265 JAPAN	\$ 2 000.00 M	3. Entrepreneurs : 50.00 %
4. 609 EUROPEAN COMMON MARKET C	\$ 2 000.00 M	4. Immigrant Entr.: 15.00 %

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

- Capital Flight Associated With Political Uncertainty
- Capital Flight Associated With Economic Uncertainty
- Emigration
- Large Capital Pools Seeking Investment Outlets Abroad (e.g. Oil States)

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

-SECTOR(S)-

-SUBSECTOR(S)-

1. 011 OIL & GAS EQUIPMENT, SERVICES
2. 010 MINE, METAL, MINERAL PROD & SRV
3. 005 COMM. & INFORM. EQP. & SERV

Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: AFRICA-MIDDLE-EAST

Mission: 347 RIYADH

Country: 322 SAUDI ARABIA

Equity Propensity Of Key Sources Of Investment From This Territory

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

Sector Preferences By Type Of Key Investors

Corporations : Services
Institutional : Portfolio Investment
Entrepreneurs : Real-Estate
Immigrant Entr.: Portfolio Investment

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

Sector : 010 MINE, METAL, MINERAL PROD & SRV
Subsector: 102 MINERALS AND MINERAL PRODUCTS

Reason(s):

RECENT ACTIVITY IN LOCAL MINING SECTOR HAS STIMULATED INTEREST IN MINING INVESTMENT INSIDE KINGDOM AND ABROAD.

Program Plans:

PUT SAUDI COMPANIES IN TOUCH WITH POTENTIAL CANADIAN PARTNERS IN MINING SECTOR.

Anticipated Results: SAUDI DIRECT INVESTMENT IN CANADIAN MINING COMPANIES AND JOINT VENTURE COOPERATION ABROAD.

Sector : 005 COMM. & INFORM. EGP. & SERV
Subsector: 999 ALL SUB-SECTORS

Reason(s):

STRONG INVESTOR INTEREST IN HI-TECH CAN BE CHANNELLED INTO VENTURE CAPITAL INVESTMENTS.

DATE: 88/01/25

DEPARTMENT OF EXTERNAL AFFAIRS

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: AFRICA-MIDDLE-EAST

Mission: 347 RIYADH

Country: 322 SAUDI ARABIA

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

Sector : 005 COMM. & INFORM. EGP. & SERV

Subsector: 999 ALL SUB-SECTORS

Program Plans:

CIRCULATE INFORMATION TO POTENTIAL INVESTORS ON EMERGING GROWTH COMPANIES IN HI-TECH FIELDS.

Anticipated Results: INCREASED SAUDI VENTURE CAPITAL INVOLVEMENT IN HI-TECH COMPANIES.

Sector : 017 SERVICE INDUSTRIES

Subsector: 172 SERVICES NOT ELSEWHERE SPECIF.

Reason(s):

INTEREST EXPRESSED BY SEVERAL LARGE SAUDI COMPANIES TO OPEN CANADIAN OFFICES FOR INVESTMENT IN REAL ESTATE, TRADING AND FINANCIAL SERVICES.

Program Plans:

MAINTAIN & EXPAND CONTACTS WITH SENIOR BANKERS SPECIALIZING IN PERSONAL BANKING TO PUBLICIZE SPECIFIC INVESTMENT OPPORTUNITIES AMONG THEIR CLIENTS.

Anticipated Results: FIND SAUDI FINANCING FOR SPECIFIC CANADIAN INVESTMENT PROPOSALS.

DATE: 88/01/25

DEPARTMENT OF EXTERNAL AFFAIRS

PAGE: 124d

Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: AFRICA-MIDDLE-EAST

Mission: 347 RIYADH

Country: 322 SAUDI ARABIA

Other Investment Program Plans

Activity(ies):

PURSUE PERSONAL CONTACTS WITH CORE GROUP OF 150 LEADING SAUDI BUSINESSMEN TO PROMOTE INVESTMENT OPPORTUNITIES IN CANADA.

Anticipated Results: EXPAND INTEREST IN CANADA AS AN INVESTMENT DESTINATION AND INCREASE VISITS TO CANADA BY POTENTIAL INVESTORS.

Activity(ies):

INCLUDE INVESTMENT COMPONENT IN PROGRAM FOR HIGH LEVEL BUSINESS DELEGATIONS TO CANADA.

Anticipated Results: INCREASED INTEREST IN REAL ESTATE & OTHER CANADIAN INVESTMENTS.

Activity(ies):

PROMOTE BUSINESS IMMIGRANT PROGRAM AMONG LARGE COMMUNITY OF AFFLUENT EXPATRIATE BUSINESSMEN CONSIDERING EMIGRATION.

Anticipated Results: FURTHER INCREASE NUMBER OF INVESTOR IMMIGRANTS TO CANADA.

DATE: 88/01/25

DEPARTMENT OF EXTERNAL AFFAIRS

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: AFRICA-MIDDLE-EAST

Mission: 347 RIYADH

Country: 322 SAUDI ARABIA

Investment Promotion Activities Proposals

Type Of Event: 040 DIRECT MAIL CAMPAIGN

Description: DISTR. MAT. ON INVT. CLIMATE IN CDA TO 150 LEAD. BUSI
Priority: 1 Date: 00/00
Sector: 999 MULTIPLE SECTORS
Sub-Sector: 999 ALL SUB-SECTORS
Location: KINSHASA

Type Of Event: 070 OTHER PROMOTIONAL EVENTS

Description: MOUNT LOW KEY PUBLIC. CAMP. IN LOCAL MEDIA TO RAISE
Priority: 2 Date: 00/00
Sector: 999 MULTIPLE SECTORS
Sub-Sector: 999 ALL SUB-SECTORS
Location: KINSHASA

Description: CONTINUE PERSONAL CONTACTS WITH SELECTED SEN. BUSIN
Priority: 5 Date: 00/00
Sector: 999 MULTIPLE SECTORS
Sub-Sector: 999 ALL SUB-SECTORS
Location: KINSHASA

Type Of Event: 071 INCOMING MISSION

Description: ARRANGE KSA PROGRAM FOR WOOD GUNDY & SENIOR BANK.
Priority: 3 Date: 00/00
Sector: 999 MULTIPLE SECTORS
Sub-Sector: 999 ALL SUB-SECTORS
Location: KSA

Type Of Event: 090 ENTREPRENEURIAL IMMIGRATION

Description: DRG. SMALL SEM. TO PUBLICIZE BUSINESS IMM. PROG.
Priority: 6 Date: 00/00
Sector: 999 MULTIPLE SECTORS
Sub-Sector: 999 ALL SUB-SECTORS
Location: KINSHASA

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 347 RIYADH		
Sector: 001 AGRI & FOOD PRODUCTS & SERVICE		
010 FAIRS		
SAUDI AGRICULTURE	RIYADH	0390
SAUDI FOOD FAIR	JEDDAH	0290
SAUDI FOOD	RIYADH	0391
024 MISSION INCOMING		
AGRICULTURAL DEALERS		0689
FOOD PRODUCTS		0690
Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV		
020 MISSION OUTGOING		
SECURITY PRODUCTS		0191
Sector: 005 COMM. & INFORM. EGP. & SERV		
010 FAIRS		
SAUDI COMMUNICATIONS/COMPUTER	RIYADH	0190
Sector: 006 ELECTRONICS EQUIP. & SERV		
020 MISSION OUTGOING		
INSTRUMENTATION		1289
Sector: 008 TRANSPORT SYS, EQUIP, COMP, SERV.		
020 MISSION OUTGOING		
TRANSPORTATION EQUIPEMENT AND SERVICES		0489
Sector: 010 MINE, METAL, MINERAL PROD & SRV		
020 MISSION OUTGOING		
MINING PRODUCTS AND SERVICES		1290
Sector: 011 OIL & GAS EQUIPMENT, SERVICES		
024 MISSION INCOMING		
NATIONAL PETROLEUM SHOW (MINI MISSION)		0690
OIL AND GAS		0590
Sector: 013 CONSUMER PRODUCTS		
024 MISSION INCOMING		
CONSUMER PRODUCTS		0689

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 347 RIYADH		
Sector: 014 EDUCATION, MEDICAL, HEALTH PROD		
020 MISSION OUTGOING		
HEALTH CARE		1189
EDUCATION AND MANPOWER TRAINING		0291
024 MISSION INCOMING		
EDUCATION AND MANPOWER TRAINING		0590
Sector: 016 INDUSTRIAL MACHIN, PLANTS, SERV.		
024 MISSION INCOMING		
ENVIRONMENT & POLLUTION CONTROL EQUIPMENT		0489
Sector: 999 MULTIPLE SECTORS		
010 FAIRS		
ARAB PROTECH		1089
SAUDI ELENEX	RIYADH	0291
SAUDI EDUCATION/COMPUTER	RIYADH	0291
SAUDI BUSINESS TRAVEL & TOURISM FAIR (SAFAR)	JEDDAH	0390
SAUDI INDUSTRIAL TRADE FAIR	RIYADH	0290
020 MISSION OUTGOING		
CANADA ARAB BUSINESS COUNCIL MISSION		0190
024 MISSION INCOMING		
JOINT ECONOMIC COMMISSION & BUSINESS DELEGATION		1090
ELECTRICAL DISTRIBUTORS		1089
SAUDI BUSINESS MISSION		0989

Export and Investment Promotion Planning System

88/89 Trade and Economic Overview

Mission: 348 KUWAIT

Country: 311 KUWAIT

KUWAIT UNLIKE MOST OIL DEPENDENT STATES SUFFERED LESS FROM THE SLUMP IN OIL PRICES DUE TO THE SIGNIFICANT REVENUES GENERATED BY THE GOV'TS 2 PRINCIPAL RESERVE FUNDS, THE GENERAL RESERVE & THE FUND FOR FUTURE GENERATIONS. IN 86, INCOME FROM INVESTMENTS EXCEEDED OIL REVENUES FOR THE 1ST TIME (\$7.7 BIL US VERSUS \$5.5 BIL US). AS A RESULT OF THE RELATIVE STABILITY OF OIL PRICES OVER THE LAST YR, THE KUWAITI GOV'T ANNOUNCED A MIDLY EXPANSIONARY BUDGET FOR 87/88. WITH AN INCREASE IN GOV'T EXPENDITURES OF 3% TO \$15 BIL CDN. THE MAJOR RECIPIENTS ARE THE MINISTRIES OF HEALTH EDUCATION, PUBLIC WORKS, DEFENCE & ELECTRICITY & WATER. WHILE THE PERIOD OF MEGAPROFJECTS MAY BE OVER & MANY SMALLER PLANNED PRO-JECTS ARE BEING REASSESSED, KUWAIT REMAINS AN ACCESSIBLE CASH MARKET OFFERING SIGNIFICANT POTENTIAL FOR ALL TYPES OF GOODS & SERVICES PARTICULARLY WELL SUITED TO CDA'S CAPABILITIES. KUWAIT'S IMPORTS WERE APPROX. \$8.5 BIL CDN IN 86. THE AREAS OFFERING THE GREATEST POTENTIAL ARE OIL & GAS OPERATIONS & MAINTENANCE EQPT, THE EDUCATION, MEDICAL & HEALTHCARE AREAS, FOOD PRODUCTS, AGRICUL-TURAL & LIVESTOCK DEVELOPMENT & TELECOMMUNICATIONS AND SPECIAL-IZED SECURITY EQUIPMENT. THE RISING YEN & MARK HAVE HELPED FOCUS ATTENTION ON NEW SOURCES OF SUPPLY, WITH CDA BEING LOOKED AT AS A PRODUCER OF SOPHISTICATED, QUALITY PRODUCTS. WHILE IMPORTS FROM EUROPE & JAPAN DROPPED BY ABOUT 5% IN 86, IMPORTS FROM NORTH AMER. SHOWED AN INCREASE OF MORE THAN 10%. THE MARKET DOES NOT HOWEVER GO BEGGING: THE EXPORTER WHO WISHES TO SUCCEED MUST VISIT THE MARKET FREQUENTLY IN ORDER TO ESTABLISH A PERSONAL RELATIONSHIP WITH THE CLIENT. DOING BUSINESS IS CLOSELY RELATED TO KNOWING & TRUSTING THE COMPANY & INDIVIDUAL WITH WHOM YOU ARE DEALING. I GENERAL, CDN EXPORTERS HAVE NOT IN THE PAST RESPONDED WELL TO IN-QUIRIES & IDENTIFIED OPPORTUNITIES IN OUR TERRITORY. THIS HAS CREATED A CERTAIN AMOUNT OF BAD WILL TOWARDS THE CDN EXPORT COMMUNITY COMPENSATED FOR IN PART BY A CORE OF COMMITTED CDN EXPORTEES WHO HAVE HAD CONSIDERABLE SUCCESS. A MAJOR EMPHASIS WILL BE PUT ON MAKING EXPORTERS MORE AWARE OF THE SUBSTANTIAL OPPOR. IN THE MKT THROUGH MISSIONS, FAIRS, SECTORAL REPORTS, & FOLLOWUP ON REQUESTS FROM AGENTS & CLIENTS. THE MKT FOR INVESTMENT FROM KUWAIT CAN BE SEGMENTED INTO 3 TARGET GROUPS: A) GOV'T PRIVATE & SEMI-PRIVATE INSTITUTIONS, B) INDIVIDUAL KUWAITIS & C) EXPATRIATES. THE FIRST 2 GROUPS ARE HIGHLY KNOWLEDGEABLE ABOUT INVESTMENT OPPORTUNITIES THROUGHOUT THE WORLD & ARE INCREASINGLY TURNING THEIR ATTENTION TO CDA. THE POST HAS EXPENDED CONSIDERABLE EFFORT IN MAKING THEM AWARE OF CDA & THE REWARDS IT OFFERS. AS IS THE CASE FOR SELLING A PRODUCT OR SERVICE, A SOLID RELATIONSHIP MUST BE ESTABLISHED IN ORDER TO ATTRACT INVESTMENT. IN THE CASE OF EX-PATRIATES, THE MAJOR INTEREST IN CDA LIES IN ENTREPRENURIAL/INVEST IMMIGRATION. AS IT IS EXTREMELY RARE FOR NON-NAT'LS TO BE GRANTED CITIZENSHIP MANY ARE RE-EVAL. THEIR FUTURES & SEEKING OPPOR. AB.

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 348 KUWAIT

Market: 311 KUWAIT

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

1. 011 OIL & GAS EQUIPMENT, SERVICES

REASONS: KUWAIT MUST OPERATE & MAINTAIN LARGEST OIL & GAS PRODUCTION/REFINING COMPLEX IN GULF. AS WELL AS HUGE ONGOING PURCHASES, KUWAIT OIL & GAS COMPANIES ALSO HAVE SEVERAL LARGE PROJECTS IN PLANNING STAGES.

2. 014 EDUCATION, MEDICAL, HEALTH PROD

REASONS: EDUCATION & HEALTHCARE CONTINUES TO BE HIGH PRIORITIES OF GOV'T. FURTHER EXPANSION & REFINEMENT OF HEALTHCARE SYSTEMS UNDERWAY. EXISTING CAMPUSES WILL BE UPGRADED & NEW MASSIVE CAMPUS TO BE BUILT.

3. 001 AGRI & FOOD PRODUCTS & SERVICE

REASONS: ALSO PRIORITY OF GOV'T FOR BEAUTIFICATION ("GREENIFICATION")/HORTICULTURAL SCHEMES PLUS AGRICULTURAL DEVELOPMENT FOR ECONOMIC DIVERSIFICATION. ALL FOOD IS IMPORTED & ANNUAL IMPORTS OF FOOD LARGEST SINGLE \

4. 007 POWER & ENERGY EQUIP. & SERV.

REASONS: POST RECEIVES LARGE NO. OF SOURCING REQUESTS. MANY INFRASTRUCTURE PROJECTS BEING IMPLEMENTED INCLUDING \$2.0 BIL SABIYA POWER STATION. O&M OF EXISTING PLANTS HOLD GREAT POTENTIAL.

5. 004 DEFENCE PROGRAMS, PRODUCTS, SERV

REASONS: KUWAIT BECOMING INCREASINGLY SECURITY CONSCIOUS. LARGEST PORTION OF ANNUAL BUDGET ALLOCATED TO DEFENCE MINISTRIES PLUS INTERIOR (SECURITY) MINISTRY SEVERAL PROJECTS UNDERWAY.

6. 009 FOREST PRODUCTS, EQUIP, SERVICES

REASONS: ALREADY ONE OF HIGHEST EXPORT SECTORS. CDA IS WELL KNOWN AS LEADING SUPPLIER. STILL EXIST GOOD OPPORTUNITIES TO EXPAND & DIVERSIFY EXPORTS

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

1. 007 POWER & ENERGY EQUIP. & SERV.
2. 009 FOREST PRODUCTS, EQUIP, SERVICES
3. 012 PETROCHEM & CHEM PROD, EQP, SERV
4. 005 COMM. & INFORM. EQP. & SERV
5. 001 AGRI & FOOD PRODUCTS & SERVICE
6. 011 OIL & GAS EQUIPMENT, SERVICES

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 348 KUWAIT

Market: 311 KUWAIT

Sector: 001 AGRI & FOOD PRODUCTS & SERVICE

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	2800.00M	\$ 2800.00M	\$ 2700.00M	\$ 2600.00M
Canadian Exports \$	2.50M	\$ 1.80M	\$ 1.50M	\$ 1.50M
Canadian Share of Import Market	0.07%	0.06%	0.05%	0.05%

Major Competing Countries

Market Share

i) 011 AUSTRALIA	010 %
ii) 620 EUROPE	010 %
iii) 548 TURKEY	010 %
iv) 577 UNITED STATES OF AMERICA	005 %
v) 029 BULGARIA	005 %
vi) 206 INDIA	005 %

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

Current status of Canadian exports:

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) CANNED AND FROZEN FOODS	\$ 500.00 M
ii) LIVE ANIMALS	\$ 250.00 M
iii) FEEDS	\$ 100.00 M
iv) WHEAT	\$ 0.00 M
v) SEMEN	\$ 0.00 M
vi) VETERINARY EQUIPMENT	\$ 0.00 M
vii) FOOD PROCESSING & HANDLING EQUIPMENT	\$ 0.00 M
viii) AGRICULTURAL EQUIP SPRAYERS, DISCS, TRACTORS	\$ 0.00 M
ix) IRRIGATION EQUIPMENT	\$ 200.00 M

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

i) Project Name: GATAR. OMAN & UAE DAIRY PROJECTS
Approximate Value: \$ 100 M
Financing Source: 012 DOM
For further info. please contact:
EMBASSY

Export and Investment Promotion Planning System

MISSION: 348 KUWAIT

COUNTRY: 311 KUWAIT

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

ii) Project Name: KUWAIT GREENIFICATION
Approximate Value: \$ 100 M
Financing Source: 012 DOM
For further info. please contact:
EMBASSY

iii) Project Name: OMAN IRRIGATION SCHEME (INCLUDES RESER-
VOIRS)
Approximate Value: \$ 250 M
Financing Source: 012 DOM
For further info. please contact:
EMBASSY

iv) Project Name: ONGOING PURCHASES
Approximate Value: \$ M
Financing Source:
For further info. please contact:
EMBASSY

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

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

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- the apparent limited sectoral capability in Canada compared to other competing export countries
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- other factor(s) described by the Trade Office as follows:
 - LACK OF FOLLOW-UP BY EXPORTERS TO SOURCING REQUESTS AND VERY INFREQUENT MARKET VISITS
 - UNWILLINGNESS TO COMPLY WITH LOCAL PACKAGING REQUESTS AND CUSTOMS

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

- aggressive marketing on the part of Canadian Exporters
- participation in trade fairs
- use of Canadian Government export promotion activities

Export and Investment Promotion Planning System

MISSION: 348 KUWAIT

COUNTRY: 311 KUWAIT

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

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

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

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

Activity: MAINTAINING CONTACTS WITH KEY IMPORTERS OF AGRICULTURE AND FOOD PROJECTS

Results Expected: INCREASED AWARENESS

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

Activity: WORK CLOSELY WITH SELECT IMPORTERS TO DETERMINE REQUIREMENTS AND EMBASSY TO TAKE LEAD IN OBTAINING QUOTES

Results Expected: REGATE BAD WILL CREATED BY SEVERAL CANADIAN COMPANIES IN PAST. SINCE FAIL TO RESPONDE TO SOURCING INQUIRIES

Activity: BUILD UP-TO-DATE BASE OF INTERESTED EXPORTERS AND ENCOURAGE FRE-QUENT MARKET VISITS

Results Expected: BETTER RESPONSE RATE AND INCREASED SALES

Activity: CAREFULLY MONITOR PROJECT ACTIVITY AND REPORT IN TIMELY FASHION

Results Expected: INCREASE EXPORTER AWARENESS OF PROJECTS AT EARLY STAGES OF IMPLIMENTATION

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 348 KUWAIT

Market: 311 KUWAIT

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import)	\$ 5000.00M	\$ 5000.00M	\$ 4800.00M	\$ 4500.00M
Canadian Exports	\$ 0.00M	\$ 0.00M	\$ 0.00M	\$ 0.00M
Canadian Share of Import Market	0.00%	0.00%	0.00%	0.00%

Major Competing Countries

Market Share

i) 112 FRANCE	000 %
ii) 265 JAPAN	000 %
iii) 051 UNITED KINGDOM	000 %
iv) 128 GERMANY WEST	000 %
v) 577 UNITED STATES OF AMERICA	000 %
vi) 620 EUROPE	000 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) INDUSTRIAL SECURITY	\$ 0.00 M
ii) PERSONAL SECURITY	\$ 0.00 M
iii) COMMUNICATIONS	\$ 0.00 M
iv) FIREFITING EQUIPMENT	\$ 0.00 M
v) EMERGENCY RESPONSE EQUIP	\$ 0.00 M
vi) AIRCRAFT AND SPARES	\$ 0.00 M
vii) SPECIALITY FIELD EQUIP	\$ 0.00 M
viii) PERSONAL PROTECTION DEVICES	\$ 0.00 M
ix) BOMB DISPOSAL EQUIP	\$ 0.00 M
x) RADAR EQUIPMENT	\$ 0.00 M

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

- i) Project Name: VARIOUS ESPECIALLY
Approximate Value: \$ 500 M
Financing Source: 012 DOM
For further info. please contact:
EMBASSY

Export and Investment Promotion Planning System

MISSION: 348 KUWAIT

COUNTRY: 311 KUWAIT

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

ii) Project Name: INDUSTRIAL - SECURITY - EMERGENCY RESPONSE

Approximate Value: \$ M

Financing Source:

For further info. please contact:

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

- exports of certain products or services to this country are subject to Canadian export controls
- the degree of import duty protection of local industry tends to be low
- approval of technical standards can present problems in the case of some imported products

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

- a lack of interest in the market on the part of Canadian exporters
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- other factor(s) described by the Trade Office as follows:
 - COMPETITION IS INTENSE MUCH OF IT BASED ON HISTORICAL TIES.
 - DIRECT SALES ARE THE NORM REQUIRING FREQUENT VISIT AND LONG TERM COMMITMENT

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

- aggressive marketing on the part of Canadian Exporters

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

Activity: ENCOURAGE CANADIAN EXPORTERS TO VISIT MARKET

Results Expected: INCREASED SALES

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

Activity: IDENTIFY SPECIFIC OPPORTUNITIES AND REPORT IN TIMELY MANNER.

Results Expected: GREATER PROJECT PURSUIT BY CANADIAN EXPORTERS

Export and Investment Promotion Planning System

MISSION: 348 KUWAIT

COUNTRY: 311 KUWAIT

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

Activity: THROUGH CONFERENCE(SUCH AS HITEC) BETTER AQUAINT EXPORTERS WITH MARKET AND SALES TECHNIQUES

Results Expected: INCREASED SALES BY ENCOURAGING GREATER FOLLOW UP OF OPPORTUNITIES

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 348 KUWAIT

Market: 311 KUWAIT

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

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	500.00M	\$ 500.00M	\$ 600.00M	\$ 700.00M
Canadian Exports \$	10.00M	\$ 5.00M	\$ 8.00M	\$ 10.00M
Canadian Share of Import Market	2.00%	1.00%	1.20%	1.40%

Major Competing Countries

Market Share

i) 265 JAPAN	030 %
ii) 507 SWEDEN	015 %
iii) 128 GERMANY WEST	015 %
iv) 112 FRANCE	005 %
v) 577 UNITED STATES OF AMERICA	015 %
vi) 051 UNITED KINGDOM	005 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) PBX EXCHANGES	\$ 30.00 M
ii) REMOTE SENSING	\$ 45.00 M
iii) TRAINING	\$ 80.00 M
iv) SWITCHES	\$ 20.00 M
v) PERIPHERALS	\$ 25.00 M
vi) CELLULAR	\$ 40.00 M
vii) TELEPHONE O & M	\$ 70.00 M
viii) BROADCASTING	\$ 15.00 M
ix) DATA COMM	\$ 95.00 M

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

- i) Project Name: OMAN LAND INFO SYSTEM
Approximate Value: \$ 100 M
Financing Source: 012 DOM
For further info. please contact:
EMBASSY - B. POUND

Export and Investment Promotion Planning System

MISSION: 348 KUWAIT

COUNTRY: 311 KUWAIT

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

- ii) Project Name: UAE TELECOM TOWERS
Approximate Value: \$ 200 M
Financing Source: 012 DOM
For further info. please contact:
EMBASSY - M. SATTAR

- iii) Project Name: TELEPHONE SYSTEMS EXPANSION (KUWAIT)
Approximate Value: \$ 200 M
Financing Source: 012 DOM
For further info. please contact:
EMBASSY - O. MUGHRABI

- iv) Project Name: BAHRAINI BATELCO HQ AND ENGINEERING
Approximate Value: \$ 60 M
Financing Source: 012 DOM
For further info. please contact:
EMBASSY - B. POUND

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

- exports of certain products or services to this country are subject to Canadian export controls
- the degree of import duty protection of local industry tends to be low

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

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- other factor(s) described by the Trade Office as follows:
CANADIAN COMPANIES ARE ALREADY ESTABLISHED BUT FAIL TO DO SUFFICIENT MARKET ANALYSIS, FOLLOWING UP AND MARKET VISITS AGAINST THOUGH AND INTENSE COMPETITION.

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

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

Export and Investment Promotion Planning System

MISSION: 348 KUWAIT

COUNTRY: 311 KUWAIT

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

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

- the adequacy of exporter information in Canadian Directories
- product/service information from Canadian companies

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

Activity: MAJOR REPORT ON TELECOM/COMPUTERS MARKET

Results Expected: INCREASED AWARENESS OF OPPORTUNITIES

Activity: ENCOURAGE CANADIAN COMPANIES TO ESTABLISH CONTACTS AND FOLLOW-UP BY REGISTERING FOR FUTURE PROJECTS

Results Expected: INCREASED PARTICIPATION IN TENDERS AND ABILITY TO BID.

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

Activity: INCREASED CONTACTS WITH MAJOR PLANNING GROUPS AND END USERS

Results Expected: INCREASED MARKET AWARENESS

Activity: INCREASED REPORTING ON SECTOR AND SUB SECTORS

Results Expected: FAMILIARIZE CANADIAN COMPANIES WITH OPPORTUNITIES AND INCREASE MARKETING ACTIVITY

Activity: FOLLOW-UP ON INDIVIDUAL COMPANY EFFORTS BY REINFORCING CANADIAN CAPABILITIES TO CLIENTS

Results Expected: INCREASED PROMOTION AND SALES

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 348 KUWAIT

Market: 311 KUWAIT

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

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	3050.00M	\$ 3000.00M	\$ 2900.00M	\$ 2785.00M
Canadian Exports \$	5.00M	\$ 5.00M	\$ 5.50M	\$ 4.00M
Canadian Share of Import Market	0.20%	0.20%	0.20%	0.10%

Major Competing Countries

Market Share

i) 265 JAPAN	035 %
ii) 237 ITALY	005 %
iii) 128 GERMANY WEST	015 %
iv) 577 UNITED STATES OF AMERICA	020 %
v) 112 FRANCE	005 %
vi) 051 UNITED KINGDOM	005 %

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

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) AUTOMOTIVE	\$ 1000.00 M
ii) AUTO PARTS	\$ 150.00 M
iii) AEROSPACE	\$ 300.00 M
iv) MARINE EQUIPMENT	\$ 100.00 M

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

i) Project Name: ONGOING PURCHASES
Approximate Value: \$ M
Financing Source:
For further info. please contact:
EMBASSY

ii) Project Name: MARINE FISHERIES FLEET MODERNISATION
(OMAN)
Approximate Value: \$ 100 M
Financing Source: 012 DOM
For further info. please contact:
EMBASSY

Export and Investment Promotion Planning System

MISSION: 348 KUWAIT

COUNTRY: 311 KUWAIT

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

- iii) Project Name: FLEET RENEWAL/MAINTENANCE GULF AIR
Approximate Value: \$ 500 M
Financing Source: O12 DOM
For further info. please contact:
EMBASSY.

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

- exports of certain products or services to this country are subject to Canadian export controls
- the degree of import duty protection of local industry tends to be low

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

- a lack of interest in the market on the part of Canadian exporters
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- other factor(s) described by the Trade Office as follows:
 - LACK OF AWARENESS OF CANADIAN SUPPLY CAPABILITY
 - FEW MARKET VISITS BY CANADIAN EXPORTERS

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

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

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

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

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

Export and Investment Promotion Planning System

MISSION: 348 KUWAIT

COUNTRY: 311 KUWAIT

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

Activity: OBTAINING AUTOMOTIVE SOURCING GUIDES FOR PROVINCES

Results Expected: BETTER RESPONSES TO SOURCING INQUIRIES

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

Activity: VISITS TO KEY AUTOMOTIVE DEALERS BY EMBASSY OFFICERS TO AQUAINT WITH CANADIAN CAPABILITY

Results Expected: CHANGE TRADITIONAL SUPPLY PATTERNS

Activity: ENCOURAGE VISITS TO CANADIAN AUTO SHOW BY IMPORTERS

Results Expected: INCREASE AWARENESS OF CANADIAN CAPABILITIES

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 348 KUWAIT

Market: 311 KUWAIT

Sector: 009 FOREST PRODUCTS, EQUIP, SERVICES

Subsector: 094 PULP AND PAPER PRODUCTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	350.00M	\$ 300.00M	\$ 175.00M	\$ 250.00M
Canadian Exports \$	0.00M	\$ 0.00M	\$ 0.00M	\$ 0.00M
Canadian Share of Import Market	0.30%	0.30%	0.40%	0.40%

Major Competing Countries

Market Share

i) 504 FINLAND	006 %
ii) 620 EUROPE	040 %
iii) 507 SWEDEN	006 %
iv) 068 CHILE	010 %
v) 265 JAPAN	004 %
vi) 344 MALAYSIA	000 %

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

Current status of Canadian exports:

Products/services for which there are
good market prospects

Current Total Imports

	In Canadian \$
i) NEWSPRINT	\$ 20.00 M
ii) KRAFT	\$ 10.00 M
iii) SANITARY PAPERS	\$ 20.00 M
iv) CONTAINERBOARD	\$ 20.00 M
v) FINE PAPER	\$ 10.00 M
vi) BUSINESS FORMS	\$ 4.00 M
vii) BOND PAPER	\$ 15.00 M
viii) SPECIALTY PAPERS	\$ 5.00 M

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

- i) Project Name: ONGOING PURCHASES
Approximate Value: \$ M
Financing Source:
For further info. please contact:

Export and Investment Promotion Planning System

MISSION: 348 KUWAIT

COUNTRY: 311 KUWAIT

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

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

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

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- other factor(s) described by the Trade Office as follows:
 - POOR TRANSPORT FROM CANADA WHICH INCREASES PRICE
 - SMALL LOT PURCHASES DISSUADES LARGER CANADIAN EXPORTERS
 - LITTLE MARKETING EFFORTS TO DATE BY CANADIAN EXPORTERS

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

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

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

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

- the adequacy of exporter information in Canadian Directories
- product/service information from Canadian companies

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

Activity: IDENTIFYING KEY PURCHASERS IN TERRITORY AND PROMOTE OVERALL CAPABILITIES

Results Expected: GREATER AWARENESS OF CANADA IN MARKET. INCREASED SOURCING REQUESTS

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

Activity: WORK CLOSELY WITH DRIE/IRPI TO IDENTIFY CANADIAN EXPORTERS INTERESTED IN MARKET AND CANADIAN PRODUCTS AVAILABLE

Results Expected: HAVE LIST OF EXPORT READY FIRMS TO MIDDLE EAST TO RESPOND TO INQUIRIES

Export and Investment Promotion Planning System

MISSION: 348 KUWAIT

COUNTRY: 311 KUWAIT

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

Activity: COMPILE PREVIOUS SOURCING REQUESTS FROM LOCAL IMPORTER

Results Expected: IDENTIFY SPECIFIC TARGET PRODUCTS

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 348 KUWAIT

Market: 311 KUWAIT

Sector: 012 PETROCHEM & CHEM PROD, EQP, SERV

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1350.00M	\$ 1200.00M	\$ 1100.00M	\$ 1000.00M
Canadian Exports \$	2.00M	\$ 1.60M	\$ 1.60M	\$ 1.50M
Canadian Share of Import Market	0.10%	0.10%	0.20%	0.20%

Major Competing Countries

Market Share

i) 128 GERMANY WEST	032 %
ii) 577 UNITED STATES OF AMERICA	004 %
iii) 265 JAPAN	002 %
iv) 051 UNITED KINGDOM	016 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) CHEMICALS	\$ 50.00 M
ii) PLASTIC FILMS	\$ 140.00 M
iii) BULK INDUSTRIAL CHEMICALS	\$ 135.00 M
iv) RESINS	\$ 25.00 M
v) PETROCHEMICAL PLAN & EQUIPMENT	\$ 45.00 M

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

i) Project Name: BAHRAIN PETROCHEMICALS PLANT EXPANSION
Approximate Value: \$ 80 M
Financing Source: 012 DDM
For further info. please contact:
EMBASSY

ii) Project Name: LARGE ANNUAL IMPORT REQUIREMENTS -VARIED
Approximate Value: \$ M
Financing Source:
For further info. please contact:
EMBASSY

Export and Investment Promotion Planning System

MISSION: 348 KUWAIT

COUNTRY: 311 KUWAIT

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

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

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

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- other factor(s) described by the Trade Office as follows:

CANADIAN EXPORTERS SEEM UNAWARE OF POTENTIAL NOR COMPETITION AND DO NOT PRESENT COMPETITIVE QUOTES

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

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

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

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

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

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

Activity: ONGOING PROMOTION OF CANADIAN CAPABILITIES

Results Expected: INCREASED AWARENESS OF CANADIAN CAPABILITIES

Activity: THOROUGH INVESTIGATION AND FOLLOW-UP OF IDENTIFIED OPPORTUNITIES

Results Expected: INCREASED EXPORTS

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

Activity: AS IDENTIFIED IN LAST PLAN (ABU DHABI) WORK CLOSELY WITH DRIEOTT TO COMPILE BASE OF CAPABLE EXPORTERS AND PRODUCTS

Results Expected: INCREASED AWARENESS OF CANADIAN CAPABILITIES TO RESPOND TO SOURCING INQUIRIES

Export and Investment Promotion Planning System

MISSION: 348 KUWAIT

COUNTRY: 311 KUWAIT

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

Activity: IDENTIFY KEY END USERS/IMPORTERS/AGENTS AND ESTABLISH CONTACT

Results Expected: INCREASED MARKET AWARENESS AND REPORTING TO
ENCOURAGE MARKET VISITS

Activity: MAILING CAMPAIGN OF CHEMICALS DIRECTORY WHEN COMPLETED BY DRIEOTT

Results Expected: INCREASED AWARENESS OF CANADIAN CAPABILITIES
BY IMPORTERS

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 348 KUWAIT

Market: 311 KUWAIT

Sector: 014 EDUCATION, MEDICAL, HEALTH PROD

Subsector: 142 HOSP. & MEDICAL EQUIP, INSTRUM.

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	2500.00M	\$ 2000.00M	\$ 2100.00M	\$ 2000.00M
Canadian Exports \$	3.00M	\$ 2.00M	\$ 2.00M	\$ 2.00M
Canadian Share of Import Market	0.10%	0.10%	0.10%	0.10%

Major Competing Countries

Market Share

i) 051 UNITED KINGDOM	040 %
ii) 128 GERMANY WEST	015 %
iii) 577 UNITED STATES OF AMERICA	020 %
iv) 112 FRANCE	020 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are
good market prospects

Current Total Imports

	In Canadian \$
i) PHARMACEUTICALS	\$ 200.00 M
ii) DISPOSABLES	\$ 300.00 M
iii) HOSPITAL MANAGEMENT	\$ 100.00 M
iv) EDUCATION CONSULTING	\$ 0.00 M
v) TRAINING (MEDICAL)	\$ 0.00 M
vi) REUSEABLE LINENS	\$ 0.00 M

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

i) Project Name: 500 BEDS HOSPITAL AT AL AIN (ABU DHABI)
Approximate Value: \$ 150 M
Financing Source: 012 DOM
For further info. please contact:
EMBASSY

ii) Project Name: SALMIYA HOSPITAL (KUWAIT)
Approximate Value: \$ 45 M
Financing Source: 012 DOM
For further info. please contact:
EMBASSY

Export and Investment Promotion Planning System

MISSION: 348 KUWAIT

COUNTRY: 311 KUWAIT

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

iii) Project Name: PHYSIOTHERAPY & REHABILITATION HOSPITAL
(KUWAIT)

Approximate Value: \$ 125 M

Financing Source: 012 DOM

For further info. please contact:
EMBASSY

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

- there are import restrictions which can present significant problems
- exports of certain products or services to this country are subject to Canadian export controls
- the degree of import duty protection of local industry tends to be low

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

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- the apparent limited sectoral capability in Canada compared to other competing export countries
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- other factor(s) described by the Trade Office as follows:
 - FAILURE OF CANADIAN COMPANIES TO ACTIVELY PURSUE IDENTIFIED OPPORTUNITIES.
 - INFREQUENT MARKET VISITS

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

- participation in trade fairs
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities

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

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

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

Activity: FOLLOW-UP ON ONTARIO/FEDERAL PARTICIPATION IN MEDICARE '87

Results Expected: PARTICIPANTS WILL CONTINUE CORRESPONDENCE
WITH KEY CONTACTS

Export and Investment Promotion Planning System

MISSION: 348 KUWAIT

COUNTRY: 311 KUWAIT

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

Activity: SECTORAL REPORT

Results Expected: ENCOURAGE GREATER PARTICIPATION IN MARKET BY
CANADIAN COMPANIES

Activity: PROMOTE DOCTOR TRAINING IN CANADA BY REGIONAL HOSPITALS

Results Expected: LONG TERM CONTACT AND FAMILIARITY BY END
USERS

Export and Investment Promotion Planning System

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

Region: MIDDLE EAST

Mission: 348 KUWAIT

Market: 311 KUWAIT

Sector: 015 CONSTRUCTION INDUSTRY

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	500.00M	\$ 500.00M	\$ 600.00M	\$ 600.00M
Canadian Exports \$	5.00M	\$ 5.00M	\$ 5.00M	\$ 5.00M
Canadian Share of Import Market	1.00%	1.00%	0.90%	0.90%

Major Competing Countries

Market Share

i) 051 UNITED KINGDOM	030 %
ii) 112 FRANCE	010 %
iii) 577 UNITED STATES OF AMERICA	025 %
iv) 265 JAPAN	020 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are
good market prospects

Current Total Imports

	In Canadian \$
i) CONSULTING ENGINEER	\$ 0.00 M
ii) HEAVY EQUIPMENT SPARES	\$ 0.00 M
iii) CONSTRUCTION MATERIAL	\$ 0.00 M
iv) ARCHITECTURE	\$ 0.00 M

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

i) Project Name: KUWAIT UNIVERSITY
Approximate Value: \$ 100 M
Financing Source: 012 DOM
For further info. please contact:
EMBASSY

ii) Project Name: UAE - UMALCO ALUMINIUM SMELTER
Approximate Value: \$ 150 M
Financing Source: 024 BC
For further info. please contact:
EMBASSY

Export and Investment Promotion Planning System

MISSION: 348 KUWAIT

COUNTRY: 311 KUWAIT

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

iii) Project Name: BAHRAIN - GAS PLANT EXPANSION
Approximate Value: \$ 20 M
Financing Source: 012 DOM
For further info. please contact:
EMBASSY

iv) Project Name: OTHERS TOO NUMEROUS TO LIST
Approximate Value: \$ M
Financing Source:
For further info. please contact:
EMBASSY

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

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

- a lack of interest in the market on the part of Canadian exporters
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- other factor(s) described by the Trade Office as follows:
 - INTENSE COMPETITION FROM MANY COUNTRIES WELL ESTABLISHED IN GULF
 - FAILURE OF MOST CANADIAN COMPANIES TO MAKE COMMITMENT TO MARKET AND AGGRESSIVELY FOLLOW-UP
 - LACK OF AWARENESS OF MAJOR PROJECTS IN ADVANCE

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

- aggressive marketing on the part of Canadian Exporters
- use of Canadian Government export promotion activities
- strong sectoral capability in Canada

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

Activity: TIMELY REPORTING OF UPCOMING PROJECTS

Results Expected: INCREASED CANADIAN PARTICIPATION

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

Activity: FULL REPORT ON SERVICES MARKET IN GULF

Results Expected: GREATER MARKET AWARENESS

Export and Investment Promotion Planning System

MISSION: 348 KUWAIT

COUNTRY: 311 KUWAIT

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

Activity: ENCOURAGE CANADIAN COMPANIES TO REGISTER WITH PLANNING MINISTRIES

Results Expected: INCREASED INVITATIONS TO BID

Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: AFRICA-MIDDLE-EAST

Mission: 348 KUWAIT

Country: 311 KUWAIT

Highlights of Investment Environment

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

\$ 70 000.00 M

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

\$ 2 000.00 M

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

1. 577 UNITED STATES OF AMERICA	\$ 25 000.00 M	1. Corporations : 20.00 %
2. 051 UNITED KINGDOM	\$ 20 000.00 M	2. Institutional : 20.00 %
3. 512 SWITZERLAND	\$ 15 000.00 M	3. Entrepreneurs : 20.00 %
4. 620 EUROPE	\$ 10 000.00 M	4. Immigrant Entr.: 20.00 %

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

- Capital Flight Associated With Political Uncertainty
- Emigration
- Large Capital Pools Seeking Investment Outlets Abroad (e.g. Oil States)

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

-SECTOR(S)-

-SUBSECTOR(S)-

1. 012 PETROCHEM & CHEM PROD, EQP, SERV

Equity Propensity Of Key Sources Of Investment From This Territory

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

Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: AFRICA-MIDDLE-EAST

Mission: 348 KUWAIT

Country: 311 KUWAIT

Sector Preferences By Type Of Key Investors

Corporations : Resource Development
Institutional : Portfolio Investment
Entrepreneurs : Portfolio Investment
Immigrant Entr.: Services

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

Sector : 017 SERVICE INDUSTRIES
Subsector: 172 SERVICES NOT ELSEWHERE SPECIF.

Reason(s):

INVESTORS & INVESTMENT AUTHORITIES IN THE GULF ARE IN THE EMBRYONIC STAGES OF DISCOVERING CDA. THE EMB. IS FOCUSING ITS EFFORTS ON PROMOTING CDA AS A SAFE & REWARDING PLACE IN WHICH TO INVEST. FOLLOWING

Program Plans:

ENCOURAGE GULF COUNTRIES INVESTMENT AUTHORITIES TO SEND TEAMS OF REAL ESTATE & BOND EQUITY INVESTMENT OFFICIALS ON TAILORED TOURS OF CDA.

Anticipated Results: INCREASE COMMUNICATION BETWEEN CDA FIN. & REAL ESTATE INSTITUTIONS & LOCALS. INCREASE INVESTMENT BY 50%.

Other Investment Program Plans

Activity(ies):

CALLS ON LEADING WEALTHY FAMILIES IN ORDER TO INCREASE AWARENESS OF CDA.

Anticipated Results: INCREASE INVESTMENT IN CDA. CONTINUE SNOW-BALL EFFECT WHICH TAKES PLACE AFTER AN INDIVIDUAL VISITS & INVESTS IN CDA.

DATE: 88/01/25

DEPARTMENT OF EXTERNAL AFFAIRS

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: AFRICA-MIDDLE-EAST

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Other Investment Program Plans

Activity(ies):

ONE OF BEST WAYS TO ATTRACT INVESTMENT IS TO INCREASE GENERAL AWARE-
NESS OF CDA AS A COUNTRY & TOURISM DESTINATION. WE EXPECT TO COMPLETE
INCREASED MAILING CAMPAIGNS ON CDA & PROMOTE TOURISM AT MAJOR FAIRS &
WITH CHAMBERS OF COMMERCE & MAJOR TRAVEL AGENTS.

Anticipated Results: INCREASED AWARENESS & VISITS TO CDA WILL
LEAD TO INCREASED INVESTMENTS.

DATE: 88/01/25

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Report: B4 88/89 INVESTMENT ACTIVITIES IN MISSIONS ABROAD

Region: AFRICA-MIDDLE-EAST

Mission: 348 KUWAIT

Country: 311 KUWAIT

Investment Promotion Activities Proposals

Type Of Event: 050 SEMINARS

Description: HIGH QUALITY INVEST. SEMINARS IN GULF STATES IN

Priority: 1 Date: 12/88

Sector: 017 SERVICE INDUSTRIES

Sub-Sector: 172 SERVICES NOT ELSEWHERE SPECIF.

Location:

Market : MIDDLE EAST

<u>REFERENCE NO.</u>	<u>SECTOR NO.</u>	<u>EVENT NAME & LOCATION</u>	<u>DATE</u>
880690	008	MISSION TO AUTOMOTIVE IND. ASSOC. SHOW, MONTREAL	88/04/00
880687	999	MISSION TO KSA RELATED TO WORK PLANS OF JEC COMMITTEES	00/00/00
880689	001	AGRICULTURE MISSION TO GULF STATES	00/00/00
880696	999	BAGHDAD INT'L FAIR, IRAG	00/00/00

Market : MIDDLE EAST

REFERENCE NO.	SECTOR NO.	EVENT NAME & LOCATION	DATE
880064	005	MIDDLE EAST COMMUNICATIONS SHOW, BAHRAIN	89/03/00
880066	011	MIDDLE EAST OIL SHOW, BAHRAIN	89/03/00
880053	005	SAUDI COMPUTER	89/02/24
880054	007	SAUDI ELENEX	89/02/12
880036	005	TELECOMS MISSION FOLLOWING S. COMMUN'NS SHOW, KSA, JORDAN	89/01/00
880049	011	INCOMING VISITORS FROM EGYPT TO INTERCAN	89/00/00
880038	010	MINING EQUIPMENT & SERVICES MISSION TO OMAN	88/10/00
880057	014	SAUDI MEDICARE, RIYADH	88/10/00
880046	999	35TH DAMASCUS INTERNATIONAL FAIR	88/09/00
880042	001	DAMASCUS INTL' TRADE FAIR SYRIA	88/05/00
880050	014	MEDAX MEDICAL EQUIPMENT TEL AVIV	88/05/00
880692	014	EDUCATION/TRAINING MISSION FROM KSA(JEC FOLLOW UP)	88/09/00
880695	010	JORDAN VISITORS TO UNITAR/UNDP TARSANDS CONF. ED	88/08/07
880691	008	RAILWAY MISSION FROM KSA (JEC FOLLOW UP)	88/08/00
880694	005	COMPUTAX INFO BOOTH, ISRAEL	88/06/00
880693	999	OUTGOING MISSION TO JORDAN	88/05/00
880688	001	SAUDI AGRICULTURE '88, RIYADH, SAUDI ARABIA	88/04/00

