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External Affairs and
International Trade Canada

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Commerce extérieur Canada

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DRAFT
GEOGRAPHICAL SYNOPSIS
FOR CONSULTATION PURPOSES ONLY

WESTERN EUROPE

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



JANUARY 1990

**GEOGRAPHIC SYNOPSIS OF
EXPORT PROMOTION PROGRAM PLANS
OF CANADIAN MISSIONS ABROAD
FY 1990/91**FEB 7 1990
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This report contains a summary of the highlights of the proposed work plans of the export and investment promotion program of Canadian diplomatic missions in Western Europe for fiscal year 1990/91 commencing April 1, 1990.

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

This synopsis is generally organized alphabetically by mission except where more than one mission exists in a particular country, in this latter instance multi-mission configurations have been grouped together in the same general area of this synopsis with the Embassy or High Commission appearing first. For example Rome is followed by Milan as both missions are located in Italy. A similar geographic synopsis is also available for the following geographic regions:

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

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

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

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

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data on sectors or geographic regions to be accessed conveniently.

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

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

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

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

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

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

DEPARTMENT OF EXTERNAL AFFAIRS
AND INTERNATIONAL TRADE CANADA
EXPORT AND INVESTMENT PROMOTION PLANNING SYSTEM
1990/91 GEOGRAPHIC SYNOPSIS
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RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: ANKARA

Country: TURKEY

The trade and economic picture of Turkey into the 1990s will likely be variable in the face of continuing high inflation and slow growth. This notwithstanding, Turkey had a GNP of US \$70 billion in 1988, making it the largest and most diversified industrial economy in the Eastern Mediterranean and Middle East regions. The manufacturing sector has sustained an average growth rate of 7.5% since 1965, but overall growth is estimated to be approximately 1.0% in 1989.

Textiles and clothing remain the predominant manufacturing activities but the food and agro-sectors, iron and steel industries and motor vehicles and parts are important too. Turkey is heavily dependent on its export sector and whose performance has slipped badly in 1989. This has resulted in a programme of reduced imports. New measures introduced to help stimulate the convertibility of the lira and to increase the competitiveness of Turkish industry will have a known effort only in 1990 and beyond. Government measures to stimulate the economy brought rises in the GNP and export sector but at the cost of high inflation. In 1988, the rate was over 75% and by end-1989 will likely be 73%. To control the growth in the rate of inflation government expenditure has been reduced and public investment has declined by 14% in real terms. This has led to the slowdown in the real growth rate.

The Build-Operate-Transfer (BOT) model exploited by the Turkish Government for its capital projects has had mixed results largely due to the uncertainty in financial markets regarding risk assumption. The Canadian Ankara Metro project, currently underway, is a leader in BOT type of projects. Overall, public projects which have committed national funding or external financing will continue implementation. But public projects requiring funding in 1990/1991 will join a long queue for limited funds.

Despite this short term slowdown in growth, Turkey remains a market with great potential. The country is Western orientated, and the economy is adopting market-driven principles. Strategically located between Europe and Asia, Turkey has tentacles throughout the region; this coupled with the export orientation of the economy ensures that Turkey is a market worth investigation, not only in its own right but also for third country potential.

With the active privatisation programme of state owned industries and other investment opportunities, the legal framework also encourages the free movement of capital in and out of Turkey. The trend is towards enhanced involvement of the private sector in economic affairs, and this is where many Canadian firms should direct their activities. In the short to medium term opportunities for Canadian firms lie more with the private business community, rather than with large public sector projects.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 EXPORT PROMOTION PRIORITIES

Mission: ANKARA

Country: TURKEY

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

1. DEFENCE PROGRAMS, PRODUCTS, SERV

Within the next five years, Turkey will be procuring a wide variety of new defence equipment, much of which could be supplied from Canada. Among the largest of these are a new low level air defence systems and maritime patrol aircraft.

2. ADVANCED TECH. PROD. & SERV

Turkey is just beginning to introduce automated systems into banking, business, education and government. There is a diminished, but still very strong, demand for new telecommunications equipment of all types. Canada is well known in Turkey in this sector as a reliable supplier of superior goods and services.

3. POWER & ENERGY EQUIP. & SERV.

Turkey has one of the most comprehensive electric power development programs in the world, with over 100 thermal and hydro-electric stations planned. These, plus upgrading of the power grid, provide opportunities for many Canadian suppliers.

4. TRANSPORT SYS, EQUIP, COMP, SERV.

Canada has established a preeminent position in urban transit in Turkey by being selected to build the Ankara Metro. Almost all of Turkey's major cities will also require mass transit systems. Transportation (including road, rail and air) has been assigned a high priority by the State Planning Organization.

5. MINE, METAL, MINERAL PROD & SRV

Foreign firms are being encouraged to apply for exploration permits for gold, silver and other minerals. Turkey's hard coal mines, lead-zinc and aluminum smelters are being modernized. There remains a strong demand for base metals, thermal and coking coal.

6. OIL & GAS EQUIPMENT, SERVICES

The completion of the gas pipeline from the Bulgarian border to Ankara has opened up many opportunities for Canadian suppliers of both goods and services. A new LNG port is also planned. Turkish State Petroleum (TPAO) is eager to enter into joint ventures with Canadian firms.

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

1. ADVANCED TECH. PROD. & SERV
2. ADVANCED TECH. PROD. & SERV
3. FOREST PRODUCTS, EQUIP, SERVICES

4. TRANSPORT SYS, EQUIP, COMP, SERV.
5. MINE, METAL, MINERAL PROD & SRV
6. †

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ANKARA

Market: TURKEY

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	2000.00 \$M	1500.00 \$M	1500.00 \$M	2500.00 \$M
Canadian Exports	0.43 \$M	6.50 \$M	15.00 \$M	150.00 \$M
Canadian Share of Market	0.02 %	0.43 %	1.00 %	65.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	50.00 %
GERMANY WEST	20.00 %
UNITED KINGDOM	5.00 %
ITALY	5.00 %
NETHERLANDS	5.00 %
FRANCE	5.00 %

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

Products/services for which there are good market prospects:

1. Low level air defence system
2. F-5 aircraft overhaul services/supply of parts
3. Test facilities for J 79-85 engines
4. ASW/Coastal patrol aircraft
5. Mobile radar co-production
6. Turkish Armed Forces integrated communications sys
7. Supply of fast attack/mine hunter vessels
8. Shipboard electronics systems
9. Ordnance/guns/Howitzer modernization programme
10. Tracker overhaul programme
11. Multi-role helicopter co-production programme
12. Aircraft/helicopter simulators

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ANKARA

Market: TURKEY

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Competitive pricing
- Strong sectoral capability in Canada
- Good local agents - under
- standing of local market
- conditions

Factors for Canadian exports not reaching market potential:

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

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

Activity: Visit to Canada by Turkish Minister of Defence

Expected Results: Promote Cdn capability in defence field-ADATS, Dash 8, C1

Activity: Organization of a Canadian defence products mission

Expected Results: Increased familiarity of Turkish Armed Forces w/Cdn defence

Activity: Present a briefing by DeHavilland to Turkish Military/Air Forces

Expected Results: Promote ASW variant of DASH-8

Activity: Start of negotiations between Cdn firm and Turkish Air Force
s on J 79/85 engine test facilities modernization project

Expected Results: Securing of a contract

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ANKARA

Market: TURKEY

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

Activity: Organization of Cdn defence projects mission and present a briefing by Msn members to Turkish military

Expected Results: Promote Cdn industrial capability in defence field.

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

Activity: Visit to Canada by Turkish Minister of Defence

Expected Results: Promote Canadian defence capability

Activity: Encourage Canadian firms engaged in defence sector to consider opportunities in Turkish market

Expected Results: Participation of Cdn firms in MOD's tenders

Activity: Assisting Canadian firms in preparation of an attractive proposal for F-5 modernization project

Expected Results: Contract award to Canadian firm

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ANKARA

Market: TURKEY

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

Supply & co-production in Turkey of mine hunter ships	Approximate Value: 300 M\$ Financing Source : EDC - Export Dev Corporation DOM - Domestically funded Contact : D.B. Collins, Cdn Embassy, An- kara, Turkey, Phone 136-1275
Supply of coastal/patrol ASW role aircraft	Approximate Value: 300 M\$ Financing Source : EDC - Export Dev Corporation DOM - Domestically funded Contact : Can Ozguc, Cdn Embassy, Ankara Turkey, Phone 136-1275
Supply and co-production of mobile radars	Approximate Value: 160 M\$ Financing Source : EDC - Export Dev Corporation OTHER Contact : D. B. Collins/Can Ozguc
Turkish Armed Forces Integra- ted Communications System	Approximate Value: 100 M\$ Financing Source : EDC - Export Dev Corporation OTHER Contact : D. B. Collins/Can Ozguc

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ANKARA

Market: TURKEY

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	800.00 \$M	700.00 \$M	600.00 \$M	600.00 \$M
Canadian Exports	140.00 \$M	100.00 \$M	80.00 \$M	80.00 \$M
Canadian Share of Market	17.50 %	14.30 %	13.30 %	13.30 %

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

Major Competing Countries

Market Share

GERMANY WEST	25.00 %
JAPAN	15.00 %
BELGIUM	10.00 %
ITALY	5.00 %
UNITED STATES OF AMERICA	5.00 %

Current Status of Canadian

exports in this sector/subsector: Well established and growing

Products/services for which there are good market prospects:

1. Digital Telephone Exchanges
2. Rural Telecommunications Equipment
3. Satellite Earth Stations
4. Broadcasting Equipment
5. Airport Equipment
6. Remote Sensing
7. Spectrum Management
8. Vessel Traffic Management

Factors contributing to current successful Canadian exports:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ANKARA

Market: TURKEY

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
 - Lack of promotion and advertising
 - Non-competitive financing
 - Market prospects have not been adequately explored
 - Market is becoming self sufficient
 -
-

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

Activity: Communications 90
Expected Results: Exposure for Canadian companies

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ANKARA

Market: TURKEY

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

South Anatolian Development Project	Approximate Value:	100 M\$
	Financing Source :	
	Contact	: M. Wondergem/A. Kosetorunu 011-90-4-136-1277
Free Zones Telecommunications Project	Approximate Value:	20 M\$
	Financing Source :	
	Contact	: M. Wondergem/A. Kosetorunu 011-90-4-136-1277

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ANKARA

Market: TURKEY

Sector : POWER & ENERGY EQUIP. & SERV.

Sub-Sector: HYDRO

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

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

Factors for Canadian exports not reaching market potential:

- _____
- _____

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

- Activity: Thermal plants
Expected Results: Contract award for implementation work on thermal upgrade
- Activity: Encourage Canadian firms for participation in TEK's turnkey power transmission line projects
Expected Results: Participation of a Cdn firm in tendering process for proj.
- Activity: Encouragement of AECL to consider BOT model for implementation of nuclear power plant project
Expected Results: Acceptance of BOT formula and start of negotiations

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ANKARA

Market: TURKEY

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

Ilisu Dam & HEPP (120 MW) GAP Region
Approximate Value: 700 M\$
Financing Source : EDC - Export Dev Corporation
OTHER
Contact : D. B. Collins/C. Ozguc
Phone: (90)-4-136-1277

Kayseri Yamula/Bayramhacili Dam & HEPP Projects (270 MW)
Approximate Value: 350 M\$
Financing Source : EDC - Export Dev Corporation
OTHER
Contact : D. B. Collins/C. Ozguc
Phone: (90)-4-136-1277

Karkamis Dam & HEPP (180 MW) AP Region
Approximate Value: 200 M\$
Financing Source : EDC - Export Dev Corporation
Contact :

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ANKARA

Market: TURKEY

Sector : TRANSPORT SYS, EQUIP, COMP, SERV.

Sub-Sector: RAIL

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

Factors for Canadian exports not reaching market potential:

- _____
- _____

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

Activity: Preparation of a turnkey proposal for Bursa light rail project
Expected Results: Securing of contract

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

Activity: Preparation of a trun-key proposal for Istambul and Izmir Heavy Rail Transit Project
Expected Results: An attr pack w/concessional finc may result in contract

Activity: Canadian firm to accept local manufacturing of rolling stock in Turkey
Expected Results: J.V. to manufacture rolling stock in Turkey

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ANKARA

Market: TURKEY

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

Ist. Heavy Rail Transit Proj. Approximate Value: 1000 M\$
Financing Source : EDC - Export Dev Corporation
DOM - Domestically funded
Contact : D.B. Collins/ Can Oztug
Phone 136-1277

Izmir Light Metro Project Approximate Value: 300 M\$
Financing Source : EDC - Export Dev Corporation
DOM - Domestically funded
Contact : D.B. Collins/Can Oztug
Phone: 136-1277

Bursa Light Rail Project Approximate Value: 150 M\$
Financing Source : EDC - Export Dev Corporation
DOM - Domestically funded
Contact : D.B. Collins/Can Oztug
Phone 136-1277

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ANKARA

Market: TURKEY

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: AEROSPACE

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

Factors for Canadian exports not reaching market potential:

- _____
- _____

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ANKARA

Market: TURKEY

Sector : MINE, METAL, MINERAL PROD & SRV

Sub-Sector: ALL SUB-SECTORS

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

Factors for Canadian exports not reaching market potential:

- _____
- _____

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

Activity: Promote Canadian magnetic geological mapping technology
 Expected Results: Securing of a contract f/State Mineral Research Institute

Activity: Participation of Canadian firm in Turkish Hard Coal Board'
 methane gas extraction project
 Expected Results: Contract award to Canadian firm

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ANKARA

Market: TURKEY

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

Supply of wide variety of
matas

Approximate Value: 150 M\$
Financing Source : DOM - Domestically funded
OTHER
Contact : D.B. Collins/C. Ozguc
Phone: (90)-4-136-1277

Supply of mining/metals for
Cdn supp:Gas Pipeline Extens.

Approximate Value: 0 M\$
Financing Source : OTHER
Contact : M. Wondergem/A. Kosetorunu
Phone: (90)-4-136-1277

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ANKARA

Market: TURKEY

Sector : OIL & GAS EQUIPMENT, SERVICES

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	300.00 \$M	225.00 \$M	250.00 \$M	250.00 \$M
Canadian Exports	5.00 \$M	1.50 \$M	1.50 \$M	5.00 \$M
Canadian Share of Market	0.02 %	0.01 %	0.01 %	0.02 %

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

Major Competing Countries Market Share

UNITED STATES OF AMERICA	20.00 %
UNITED KINGDOM	15.00 %
FRANCE	12.00 %
ITALY	10.00 %
JAPAN	10.00 %

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

Factors for Canadian exports not reaching market potential:

- _____
- _____

DEPARTMENT OF EXTERNAL AFFAIRS

PEMD - Proposed Government Promotional Activities 1990/91

Proposals As Of December 23/89

Post: Ankara

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Contact</u>
90/04/04	Medecine 90 Istanbul, Turkey Info Booth, Only	Education, Medical, Health Products
90/10/00	Canada Fair '90 Istanbul, Turkey Fair, Solo	Advanced Tech. Products & Services
90/10/31	Communications 90 Istanbul Info Booth, Only	Advanced Tech. Products & Services
90/11/00	Dairy Cattle And Genetic Materials Mission To Turkey Mission Out. Industry	Agri & Food Products & Services
91/02/06	Packaging 91 Istanbul, Turkey Info Booth, Only	Industrial Machine, Plants & Services
00/00/00	Turkish Ministry Of Health Visit To Canada Mission In, To Industry	Education, Medical, Health & Services
00/00/00	Turkish Ministry Of Agriculture To Winterfair, Toronto Mission In, To Fair	Agri & Food Products & Services

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: ATHENS

Country: GREECE

OVERVIEW: During '88 GNP grew by 3.5% to about US\$ 50 billion and is expected to increase at the slower rate of 2.9% for 1989. Greece has a small industrial base with manufacturing representing only 20% of the GNP. The agricultural sector represents 17% of the GNP while the heart of the economy remains the service sector which represents over 56% of the GNP. Economic policy has remained constant throughout 1988 and 1989 although some reforms and liberalizations in the financial system were introduced.

The major worrying factor in the economy is the size of the budget deficit of Cdn \$14 billion, not including a Cdn \$4 billion deficit of the crown corporations. This deficit is 22% of the GNP and has added to the national debt which is now 105% of the GNP.

Inflation decreased slightly to 14% in 1988 but the outlook for 1989 is to see it increase to 17% due to large spending during the pre June 1989 election period. This inflation rate is about 3 times higher than the average rate within the EEC and is one of the worrying factors concerning the long-term competitiveness of Greek goods within the EEC. Unemployment remains stable at about 7.4% which is lower than the EC average. Foreign debt at the end of 1988 was about US\$21.0 billion and is expected to grow to US\$23 billion for 1989. About three quarters of the debts are loans to the government sector. Foreign exchange reserves reached record levels of US\$4.6 billion at the end of 1988 but are expected to decrease by about 10% for 1989. The current account deficit remained stagnant in 1988 at the US\$ 1.3 billion level but it is expected to increase slightly to the US\$1.5 billion level for 1989 - basically due to a 20% decrease in receipts from tourism. On the other hand receipts from the EEC are expected to increase by about 40%.

OUTLOOK: The outlook continues to be generally favourable provided some decisive economic decisions are taken in the short term regarding the deficit and inflation. GNP is expected to remain near the 1989 level with slight increases in the secondary and tertiary sectors of the economy while agricultural output is expected to remain constant.

Mergers and acquisitions especially in the food and consumer goods sectors occurred at record levels in the last 18 months and are likely to continue for the next few years as the Greek economy realigns itself in preparation for the increased competition that will flow from the liberalized Internal Market of post 1992. This could provide opportunities for Canadian companies looking for an entre to the European market.

OPPORTUNITIES: The government will likely introduce austerity measures to cope with the government deficit which will limit the amount of opportunities in the public sector, but will not affect growing opportunities in the private sector. There will likely be a small increase in investment in industrial equipment. Also the large level of military spending, about Cdn. \$2.5 billion (10% of budget and 5% of GNP) represents good market opportunities, provided financing is offered. In the longer term, both the energy and forestry sector appear to offer good potential for Canadian products. More traditional sectors such as agricultural and food products (fish, seed potatoes, beans, skins and fur cuttings) offer a stable annual trade base of about \$25-30 million. Some opportunities also exist for technology and tourist inflows to Canada.

The major difficulties for Canadian exporters are still the duty free

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RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: ATHENS

Country: GREECE

EEC competition, requests for countertrade and offsets, and other NTB's such as tenders in Greek, payment in local currency, and bureaucracy. The volume of trade should increase modestly due to generally good economic conditions and new spot opportunities in the industrial, defence and forestry sectors.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 EXPORT PROMOTION PRIORITIES

Mission: ATHENS

Country: GREECE

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

1. DEFENCE PROGRAMS, PRODUCTS, SERV

Greece is spending approx. 5% of its GNP on defence (about \$2 billion annually) which represents a wide range of opportunities for Canadian companies. Greece also has several NATO financed military projects.

2. FOREST PRODUCTS, EQUIP, SERVICES

Greece does not have sufficient forests to meet its requirements for cellulose including construction grade timber. Also considerable interest has been developed over past few years by Emb in timber frame construction which should lead to sales of plywood and other forest products. Also good opportunities for pulp and paper.

3. OIL & GAS EQUIPMENT, SERVICES

All the oil produced in Greece (20,000 BPD) is by a Canadian controlled consortium. This should give us a preferred access to this co. with better than average chances to introduce Canadian goods and services. Greece is also introducing a billion dollar natural gas P.L. and LNG project.

4. ADVANCED TECH. PROD. & SERV.

Hellenic telecommunications organization program includes the creation of a packet switching data processing and distribution system, as well as the development of its telecom. system including rural, telecommunications. Good opps exist. Also for software. Also opps to participate in future digital telephone switching expansion of \$50 mill/yr next 5 yrs.

5. TRANSPORT SYS, EQUIP, COMP, SERV.

Olympic Aviation still requires the renewal of its fleet. Govt is expected to proceed with next phase Athens metro (24Km). Canada's interest is in aircraft, rolling stock, and equipment such as locos, rails and a new major overhaul. Maintenance shop for the railways.

6.

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

1. FOREST PRODUCTS, EQUIP, SERVICES
2. CONSUMER PRODUCTS & SERVICES
3. FISHERIES, SEA PRODUCTS & SERV.

4. AGRI & FOOD PRODUCTS & SERVICE
5. TRANSPORT SYS, EQUIP, COMP, SERV.
- 6.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ATHENS

Market: GREECE

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	3000.00 \$M	2500.00 \$M	2500.00 \$M	3000.00 \$M
Canadian Exports	15.00 \$M	0.00 \$M	0.00 \$M	60.00 \$M
Canadian Share of Market	0.50 %	0.00 %	0.00 %	2.00 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	35.00 %
GERMANY WEST	30.00 %
FRANCE	20.00 %
UNITED KINGDOM	15.00 %
ITALY	10.00 %

Products/services for which there are good market prospects:

1. Dash -8-300
2. CL-215
3. Radars
4. VDS-Sonar
5. CRV-7 Rocket

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Fairs and Missions support
- Trade Fair activity
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- Competitive Canadian financing
- Willingness of exporters to invest/joint venture in territory

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ATHENS

Market: GREECE

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- _____
- _____

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

Activity: Follow up on procedures to award naval radars to CMC.
Expected Results: Sale of 6 Radar Systems.

Activity: Attempt to have 2 Canadian companies included in shortlist for ASW aircraft.

Expected Results: Get one Canadian company specified for ASW aircraft.

Activity: Promote VD Sonars to hell. Navy
Expected Results: Get Fathom specified for VDS Sonars.

Activity: Promote Indal for helicopter support systems for new frigates.

Expected Results: Get Indal specified for helicopter support systems.

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

Activity: Arrange for demo DASH-8-300.

Expected Results: Prove to navy that aircraft can fulfill specifications.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ATHENS

Market: GREECE

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	250.00 \$M	250.00 \$M	250.00 \$M	250.00 \$M
Canadian Exports	1.00 \$M	0.00 \$M	1.00 \$M	2.50 \$M
Canadian Share of Market	0.40 %	0.00 %	0.40 %	1.00 %

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

Major Competing Countries

Market Share

GERMANY WEST	15.00 %
SWEDEN	5.00 %
FRANCE	1.50 %
UNITED KINGDOM	1.50 %
JAPAN	50.00 %
EAST GERMANY	5.00 %

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

Products/services for which there are good market prospects:

1. Computers and software
2. Telecommunications
3. Electronics
4. Data Distr. Equipment

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Non-competitive financing

-

-

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ATHENS

Market: GREECE

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

Activity: Assist rural telecom and other cdn cos by alerting them on upcoming tenders and monitoring evaluation.

Expected Results: Obtain 5% of wards in communication equipment.

Activity: Monitor development of data processing system.

Expected Results: Inclusion of Cdn cos/supply of data network packet switching

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

Activity: Greek Govt has recently started to introduce satellite TV. Post is monitoring.

Expected Results: Inclusion of Cdn cos in supply of equipment.

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

Activity: Satellite TV

Expected Results: Inclusion of Cdn cos in supply of equipment

Activity: Data processing.

Expected Results: Inclusion of Cdn cos in supply of equipment.

Activity: Informatics.

Expected Results: Inclusion of Cdn cos in supply of equipment.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ATHENS

Market: GREECE

Sector : TRANSPORT SYS, EQUIP, COMP, SERV.

Sub-Sector: URBAN TRANSIT

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	50.00 \$M	50.00 \$M	50.00 \$M	50.00 \$M
Canadian Exports	1.00 \$M	1.00 \$M	1.00 \$M	30.00 \$M
Canadian Share of Market	2.00 %	2.00 %	2.00 %	2.00 %

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

Major Competing Countries

Market Share

UNITED KINGDOM	20.00 %
FRANCE	20.00 %
GERMANY WEST	20.00 %
EUROPEAN COMMON MARKET C	20.00 %
UNITED STATES OF AMERICA	20.00 %

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

Products/services for which there are good market prospects:

1. Locomotives
2. R.R. maintenance shop
3. Syst. equipment

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Limited Canadian capabilities
- Market prospects have not been adequately explored
- Purchases are made through Govt.
- tenders only-competition strong

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ATHENS

Market: GREECE

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

Activity: Follow up on procedures to ensure contract for 10 locos goes to GM Canada or Bombardier.
Expected Results: Sale of 10 locos (\$30 million).

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

Activity: Assist Canadian company who is pursuing major overhaul R.R. repair - maintenance shop
Expected Results: Get Canadian company on short list.

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

Activity: Rail electrification project
Expected Results: \$5 million over longer period.

Activity: Rails - Tender
Expected Results: 5% chance of winning Govt tender.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ATHENS

Market: GREECE

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: AEROSPACE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	400.00 \$M	50.00 \$M	5.00 \$M	150.00 \$M
Canadian Exports	5.00 \$M	2.00 \$M	1.00 \$M	50.00 \$M
Canadian Share of Market	1.00 %	4.00 %	2.00 %	30.00 %

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

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

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

Products/services for which there are good market prospects:

1. CL-215 and CL-215 T
2. Canadair's challenger.
3. DHC's Dash-8 300

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- _____
- _____

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ATHENS

Market: GREECE

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

Activity: Follow up on Govt's intentions to purchase VIP aircraft and ensure that Canadair is included in shorlist for bidding.
Expected Results: Obtain RFQ for submission of offer.

Activity: Follow up on Govt's intentions to purchase 5 CL-215 AC.
Expected Results: Sale of 5 aircraft.

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

Activity: DASH-8-300 demo
Expected Results: Increased awareness of aircrafts capabilities.

Activity: Challenger demo.
Expected Results: Increased awareness of aircrafts capabilities.

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

Activity: Olympic Aviation fleet renewal/increase.
Expected Results: Supply of aircraft from Canada.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ATHENS

Market: GREECE

Sector : FOREST PRODUCTS, EQUIP, SERVICES

Sub-Sector: WOOD AND WOOD PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	179.00 \$M	160.00 \$M	160.00 \$M	160.00 \$M
Canadian Exports	1.40 \$M	1.20 \$M	1.20 \$M	1.20 \$M
Canadian Share of Market	0.80 %	0.80 %	0.80 %	0.80 %

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

Major Competing Countries

Market Share

SWEDEN	13.00 %
UNITED STATES OF AMERICA	5.00 %
ROMANIA	5.00 %
FINLAND	13.00 %
UNION OF SOVIET SOC REP	4.00 %
HUNGARY	5.00 %

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

Products/services for which there are good market prospects:

1. Lumber
2. Plywood
3. Timber frame housing
4. Pulp and Paper

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Provincial export promotion
- Competitive pricing

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Market prospects have not been adequately explored
- Performance of local agent or representative

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ATHENS

Market: GREECE

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

- Activity: Follow up on timber frame construc'n sem. & get local dvlprs in contact w/Cdn suppliers bldg TFC houses
Expected Results: Publish in Greek the TFC tech. & design specs rqrd. by arch.
- Activity: Continue distribution of TFC manual to engineers/architects and institutions.
Expected Results: Greater awareness of Canadian timber frame housing.
- Activity: Find corporate or assotion financing to organize an incoming buyers mission.
Expected Results: Further promotion of lumber exports.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ATHENS

Market: GREECE

Sector : OIL & GAS EQUIPMENT, SERVICES

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	50.00 \$M	50.00 \$M	50.00 \$M	100.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.00 \$M	0.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.05 %	1.50 %

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

Major Competing Countries

Market Share

UNION OF SOVIET SOC REP	25.00 %
UNITED STATES OF AMERICA	5.00 %
UNITED KINGDOM	10.00 %
FRANCE	10.00 %
GERMANY WEST	20.00 %
ITALY	5.00 %

Current Status of Canadian

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

Products/services for which there are good market prospects:

1. Project management for P.L.
2. CNG equipment
3. Oil & gas exploration equipment

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Fairs and Missions support
- Provincial export promotion
- Canada is one of few sources of supply
- Strong sectoral capability in Canada

Factors for Canadian exports not reaching market potential:

- _____
- _____

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ATHENS

Market: GREECE

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

Activity: Assist Canadian companies to participate in construction of gas P.L. and Management of network.

Expected Results: Inclusion of Canadian companies in RFPS to be issued.

Activity: Introduce Canadian CNG Technologies to combat pollution problems.

Expected Results: Introduce technology to Greece.

Activity: Assist Canadian companies to be registered with NAPC.

Expected Results: Get 10% of business of oil & gas consumables/exploit'n work

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

Activity: Natl gas and distribution network

Expected Results: Participation of Canadian companies in engineering/mngmt

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: ATHENS

Country: GREECE

The mission reports that the approximate flows to all countries of investment from its country/territory in Canadian \$ is as follows: (including portfolio flows if a primary focus)

	Total (\$ Million)	Canadian Share	Major Competitor Share
Two years ago	200.00	0.00	90.00
One year ago	200.00	0.00	90.00
Current year	200.00	0.00	90.00

The mission is of the opinion that Canada can reasonably expect to attract the following amount of foreign investment from its territory/country next year:

\$ 5 million.

Canada's major competitors for investment from this territory/country are:

- E.C. - U.K. - Italy - W. Germany
- U.S.A.

The following types of activities are currently being undertaken by Canada's major competitors to attract investment from this territory/country:

- Greece has exchange control/loosening up for EC countries. Greeks do have capital outside the country/target clientele.
- U.S.A. states (N.Y.) sponsored last year/invsmt forum/Athens

IDP Partners and related program activities:

Provinces

- Distribute Brochures.

Municipalities

- Distribute Brochures

Banks

- Visit market

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: ATHENS

Country: GREECE

IDP Partners and related activities cont d:

Investment Canada
- Info Assistance

Compared to major competitive destinations, Canada is perceived to have

the following advantages:

- F.T.A.
- Good image.
- Large Greek immigrant pop.

the following constraints:

- Far away
- Not well known.
- F.T.A.

The mission indicates the following potential for various types of investment from within its territory/country:

Type of Investment	Potential
Portfolio	LOW
Acquisition	LOW
Greenfield	LOW
Joint Venture	MEDIUM
Strategic Partnering	MEDIUM
Technology Licensing	MEDIUM

The mission believes that the following sectors are of greatest interest to investors in its territory/country and assigned ranking A = High B = Medium C = Low

Sector	Ranking
Agriculture/Food/Fish	A
Resource Processing	C
Machinery and Equipment	C
Transportation	C
Consumer Products	A
Commercial Service	C
Computer and Communications	C
Health Care Products/Medical	C
Aerospace and Defence	C
Strategic Technologies	C

DEPARTMENT OF EXTERNAL AFFAIRS

PEMD - Proposed Government Promotional Activities 1990/91

Proposals As Of December 23/89

Post: Athens

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Contact</u>
90/10/02	Defendory'90-Defence Industry Show, Athens (Piraeus) Greece Fair, National Stand	Defence Programs, Products & Services D. Adams

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: BERNE

Country: SWITZERLAND

La croissance de l'économie helvétique qui dure de façon ininterrompue depuis 1983 se poursuivra en 1990. Le produit intérieur brut devrait augmenter, tout comme en 1989, de 3.2% se situant ainsi au dessus des hausses des trois dernières années (2.1% en 1988). Le dynamisme des exportations de biens et de services (5.4% en 1988 et 1989, 4.1% en 1990) et celles des investissements (7.0% en 1988, 5.4% en 1989 et 3.4% en 1990) expliquent ce rendement de l'économie suisse. Les autres composantes de la demande intérieure contribueront également à cette progression bien qu'à un degré moindre, puisque le taux de croissance de la consommation privée (2.1%) et publique (3.0%) seront moindre que celui de l'augmentation générale de 1990. Le taux de chômage et le surplus budgétaire de l'Etat Fédéral, continuent de faire l'envie de plusieurs pays: il se situent respectivement à 0.7% (1988 et 1989) et à 476 millions de Francs Suisses. Le seul point noir à cette prestation économique reste l'inflation qui bien qu'elle devrait reculer de 4.3% en 1988 à 3.0% en 1989, n'en demeure pas moins élevée pour la Suisse. La Banque Centrale a donc fait de la stabilité des prix sa priorité première.

Le débat relié à la grande question de la position helvétique face à l'Europe de 1992 aura, au cours de 1989, et continuera probablement pendant encore un certain temps, à retenir l'attention d'une bonne partie de la population suisse et de ses dirigeants. Le gouvernement vient de créer un groupe de travail, sous la direction des Secrétaires d'Etat des Affaires Economiques Extérieures et du Département Fédéral des Affaires Etrangères, qui se chargera, après consultation auprès des autres ministères concernés, de présenter la position suisse tant au sein de l'AELE que de la CEE. Les deux dossiers épineux demeurent celui de la neutralité et de la démocratie directe.

Les exportations totales de la Suisse sont passées de 67 à 74 milliards de FS alors que les importations se sont accrues de 75 à 82 milliards laissant la Confédération avec un déficit de 8 milliards. Plus de 70% des importations provenaient de la CEE (RFA: 34%, FRANCE et ITALIE: 10%) alors que 56% des ventes suisses s'effectuaient vers ces trois pays (RFA: 21%, FRANCE: 9%, ITALIE: 8%)

Le commerce bilatéral canado-suisse a atteint un niveau record de 1.383 milliards de dollars avec des exportations de 682 millions et des importations de 701 millions. Les données des premiers 6 mois de 1989 laissent penser que le Canada pourrait, mais que difficilement, maintenir le niveau de ses ventes alors que les importations en provenance de la Suisse pourraient chuter de façon non négligeable.

La Suisse se classe toujours au septième rang comme investisseur au Canada. La majorité de ces investissements se sont concentrés, pendant la période 1986 jusqu'en août 1989, dans le secteur des services et de la machinerie.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 EXPORT PROMOTION PRIORITIES

Mission: BERNE

Country: SWITZERLAND

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

1. ADVANCED TECH. PROD. & SERV
Strong growth sector.
Specialized domestic manufacturing base.
Interest in North American Technology.
2. CONSUMER PRODUCTS & SERVICES
Swiss enjoy highest per capita income;
Superb test market for Western Europe.
3. FOREST PRODUCTS, EQUIP, SERVICES
Swiss continue to look for diversified competitive sources of supply
4. FISHERIES, SEA PRODUCTS & SERV.
High Standard of living has opened market to luxury items like salmon and lobster.
- 5.
- 6.

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

- | | |
|-------------------------------------|------------------------------------|
| 1. MINE, METAL, MINERAL PROD & SRV | 4. FISHERIES, SEA PRODUCTS & SERV. |
| 2. FOREST PRODUCTS, EQUIP, SERVICES | 5. |
| 3. CONSUMER PRODUCTS & SERVICES | 6. |

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BERNE

Market: SWITZERLAND

Sector : FISHERIES, SEA PRODUCTS & SERV.

Sub-Sector: FISH & SHELLFISH & OTHER PROD

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	238.00 \$M	289.00 \$M	228.00 \$M	230.00 \$M
Canadian Exports	22.30 \$M	33.60 \$M	32.00 \$M	33.00 \$M
Canadian Share of Market	9.30 %	11.60 %	14.50 %	14.30 %

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

Major Competing Countries

Market Share

DENMARK	21.00 %
FRANCE	14.00 %
NETHERLANDS	10.00 %
NORWAY	8.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. Frozen yellow perch fillets.
2. Fresh yellow perch fillets.
3. Salmon.
4. Shrimp.

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Fairs and Missions support
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- Imports are duty free.

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Polyphosphate not allowed as preservative for frozen fish.

21/12/89

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BERNE

Market: SWITZERLAND

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

Activity: Survey of medium sized fish and seafood importers.
Expected Results: Up-date analysis for distribution to Canadian suppliers.

Activity: Participation at IGEHO in November 89.

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

Activity: Lobster promotion in hotels/restaurants.
Expected Results: Increase awareness of Canadian products.

Activity: Prepare analysis on preferences of Swiss salmon smokers.
Expected Results: Maintain and increase sales level of Cdn fresh salmon pdcts

Activity: Promote lesser known freshwater fish species.
Expected Results: Increase Canadian market share.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BERNE

Market: SWITZERLAND

Sector : FISHERIES, SEA PRODUCTS & SERV.

Sub-Sector: PROCESSED FISH & SHELLFISH

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	166.00 \$M	220.00 \$M	190.00 \$M	200.00 \$M
Canadian Exports	8.20 \$M	7.80 \$M	7.00 \$M	7.10 \$M
Canadian Share of Market	5.00 %	3.50 %	3.60 %	3.50 %

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

Major Competing Countries

Market Share

DENMARK	18.00 %
SPAIN	7.00 %
NORWAY	6.00 %

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

Products/services for which there are good market prospects:

1. Shrimps (canned)
2. Salmon (smoked, canned)
3. Breaded seafish

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- Fairs and Missions support
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- Imports are duty free

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Non-competitive pricing
- New health regulat.
- for processed fish
- Label on package in three languages
- new health regulations (certif.)

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BERNE

Market: SWITZERLAND

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

Activity: Survey of medium sized fish and seafood importers.
Expected Results: Up-date analysis for distribution to Cdn suppliers.

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

Activity: Promote exports of Cdn processed and frozen fish products.
Expected Results: Increase penetration in this growing market.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BERNE

Market: SWITZERLAND

Sector : FISHERIES, SEA PRODUCTS & SERV.

Sub-Sector: SERVICES INCLUDING CONSULTING

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

Factors for Canadian exports not reaching market potential:

- _____
- _____

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BERNE

Market: SWITZERLAND

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	0.00 \$M	600.00 \$M	500.00 \$M	500.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.00 \$M	0.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	0.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	70.00 %
GERMANY WEST	15.00 %
AUSTRIA	5.00 %
FRANCE	5.00 %
SWEDEN	0.00 %

Current Status of Canadian

exports in this sector/subsector: Mature with little growth

Products/services for which there are good market prospects:

1. Aircraft Maintenance parts
2. N B C material
3. F-18 Fighter & Equipment

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- Competitive pricing

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Limited Canadian capabilities
- local purchase req.
- Manufac. under license or JV in CH.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BERNE

Market: SWITZERLAND

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

Activity: Purchase of chemical Litmus paper delayed in 1988. Product requires remarketing for 1990 purchase. Our contacts are key
Expected Results: Purchase order in 1990 of around \$ 2 m.

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

Activity: Follow F-18 acquisition program (should Swiss government approves procurement) for Cdn opportunities.
Expected Results: Keep Ottawa informed of progress.

Activity: Report on Swiss defence procurement.
Expected Results: Report in Fall 1990.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BERNE

Market: SWITZERLAND

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: TELECOM, DATACOM, SAT, SPACECOM

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1372.00 \$M	1923.00 \$M	1600.00 \$M	1700.00 \$M
Canadian Exports	5.00 \$M	2.60 \$M	2.80 \$M	3.00 \$M
Canadian Share of Market	0.50 %	0.14 %	0.17 %	0.18 %

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

Major Competing Countries

Market Share

GERMANY WEST	33.00 %
SWEDEN	7.00 %
UNITED KINGDOM	6.40 %
UNITED STATES OF AMERICA	4.30 %

Products/services for which there are good market prospects:

1. Switching equipment.
2. Radio communication.
3. TV receivers + parts.
4. Security and controlling communication equipment.

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Trade Fair activity
- Provincial export promotion
- Competitive pricing
- Strong sectoral capability in Canada
- Willingness of exporters to invest/joint venture in territory
- Good relation with established Swiss agents
- Having contacts with PTT

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BERNE

Market: SWITZERLAND

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Non-competitive pricing
- Lack of promotion and advertising
- PTT approval required for equipment.
- PTT supports local mfs first who can be reps for foreign products

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

Activity: Monitor new PTT deregulation legislation.

Expected Results: Better inform Cdn exporters of mkt changes due to deregulation.

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

Activity: Telecom 91

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

Activity: Develop PTT contacts due to reorganization based on pending deregulation legislation.

Expected Results: Establish contacts for Cdn exporters needing PTT approval.

Activity: Promote Radarsat to Swiss market.

Expected Results: Increase awareness of Cdn exporters.

Activity: Follow-up contacts made at ITU COM 89 to develop database on telecom firms in Switzerland.

Expected Results: Increase awareness of Cdn products & sces in telecom sector.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BERNE

Market: SWITZERLAND

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: COMPUTERS HARD/SOFTWARE & COMP

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	3120.00 \$M	3212.00 \$M	2850.00 \$M	2900.00 \$M
Canadian Exports	6.90 \$M	14.50 \$M	15.00 \$M	15.50 \$M
Canadian Share of Market	0.22 %	0.45 %	0.53 %	0.53 %

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

Major Competing Countries

Market Share

GERMANY WEST	23.00 %
UNITED STATES OF AMERICA	19.20 %
UNITED KINGDOM	14.80 %
NETHERLANDS	10.00 %
FRANCE	7.00 %
JAPAN	5.50 %

Products/services for which there are good market prospects:

1. Peripherals
2. Components, components parts.
3. Digital processors
4. Memory units.
5. Automatic dataprocessors.
6. Portable computers.
7. LAN
8. Magnetic tapes.

Factors contributing to current successful Canadian exports:

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BERNE

Market: SWITZERLAND

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Duty free Imports from EFTA & EC

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

Activity: Follow-up informatics mission (Feb. 89) results
Expected Results: Determine commercial arrangements made.

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

Activity: Swiss Data, Basel 4-8 Sept 90 (info booth)
Expected Results: Participation by 5 Canadian firms.

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

Activity: Develop data base of major Swiss firms in computer sector.
Expected Results: Provide Cdn exporters with more complete information.

Activity: Up-date report on Swiss computer market.
Expected Results: Provide Cdn exporters with more complete information.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BERNE

Market: SWITZERLAND

Sector : TRANSPORT SYS, EQUIP, COMP, SERV.

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	7600.00 \$M	8506.00 \$M	7198.00 \$M	7917.00 \$M
Canadian Exports	9.20 \$M	15.90 \$M	13.40 \$M	16.00 \$M
Canadian Share of Market	0.10 %	0.19 %	0.19 %	0.20 %

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

Major Competing Countries

Market Share

GERMANY WEST	39.80 %
JAPAN	17.80 %
FRANCE	9.20 %
UNITED STATES OF AMERICA	7.70 %
ITALY	7.40 %
BELGIUM	4.30 %

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

Products/services for which there are good market prospects:

1. Aircraft engines + parts
2. Automotive parts

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- Competitive pricing

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Restrictive standards
- Non-competitive pricing
- Unsuitable product

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BERNE

Market: SWITZERLAND

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

- Activity: SITEV 90: 15-18 May 1990 (Geneva)
Support firms participating. Ontario tentively booked space.
Expected Results: Increase market penetration.
- Activity: Maintain contact with Swiss regional airlines procuring
commuter aircraft.
Expected Results: Convince Swiss firms to increase their procurement in Cda.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BERNE

Market: SWITZERLAND

Sector : FOREST PRODUCTS, EQUIP, SERVICES

Sub-Sector: WOOD AND WOOD PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1000.00 \$M	1037.00 \$M	837.70 \$M	879.60 \$M
Canadian Exports	15.30 \$M	14.50 \$M	12.30 \$M	13.50 \$M
Canadian Share of Market	1.53 %	1.40 %	1.47 %	1.53 %

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

Major Competing Countries

Market Share

GERMANY WEST	38.20 %
AUSTRIA	23.60 %
FRANCE	11.60 %
ITALY	8.00 %
FINLAND	4.20 %
SWEDEN	2.60 %

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

Products/services for which there are good market prospects:

1. Sawn timber (spruce, fir)
2. Plywood

Factors contributing to current successful Canadian exports:

- Import duties are moderate
- Aggressive marketing
- Competitive pricing
- Strong sectoral capability in Canada

Factors for Canadian exports not reaching market potential:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BERNE

Market: SWITZERLAND

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

Activity: Support key importer's claims for customs reclassification to become eligible for lower import duty.

Expected Results: To obtain equal treatment for Canadian exporters.

Activity: Pursue program of greater awareness for use of Cdn wood products.

Expected Results: Increase penetration of Cdn wood in Swiss construction ind.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BERNE

Market: SWITZERLAND

Sector : FOREST PRODUCTS, EQUIP, SERVICES

Sub-Sector: PULP AND PAPER PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1690.00 \$M	1921.00 \$M	1699.00 \$M	1953.00 \$M
Canadian Exports	39.50 \$M	54.80 \$M	48.50 \$M	55.70 \$M
Canadian Share of Market	2.30 %	2.85 %	2.85 %	2.85 %

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

Major Competing Countries

Market Share

GERMANY WEST	32.80 %
SWEDEN	14.80 %
FINLAND	11.50 %
AUSTRIA	11.00 %
FRANCE	6.50 %
BENELUX COUNTRIES	3.50 %

Current Status of Canadian

exports in this sector/subsector: Well established and growing

Products/services for which there are good market prospects:

1. Wood pulp (sulphit cell.)
2. Wood chips
3. Paperboard

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- Competitive pricing
- Strong sectoral capability in Canada

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Import duties are high
- Non-competitive pricing
- fluctuating exchange rate and EFTA
- preferences.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BERNE

Market: SWITZERLAND

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

Activity: Visit to top ten firms.

Expected Results: Provide further support/info to Canadian exporters.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BERNE

Market: SWITZERLAND

Sector : MINE, METAL, MINERAL PROD & SRV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	7954.00 \$M	8910.00 \$M	7196.00 \$M	7556.00 \$M
Canadian Exports	11.20 \$M	242.00 \$M	187.00 \$M	196.00 \$M
Canadian Share of Market	0.14 %	2.71 %	2.59 %	2.59 %

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

Major Competing Countries

Market Share

GERMANY WEST	20.50 %
UNITED KINGDOM	14.00 %
FRANCE	7.60 %
ITALY	6.90 %
UNITED STATES OF AMERICA	5.90 %
BENELUX COUNTRIES	4.80 %

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

Products/services for which there are good market prospects:

1. Gold, gold coins

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- _____
- _____

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BERNE

Market: SWITZERLAND

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

Activity: Prepare small report, pending satisfactory reply to our questionnaire, about 10 key gold importing establishments.

Expected Results: Complete knowledge about this nbr 1 sector of Cdn exp to CH.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BERNE

Market: SWITZERLAND

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: APPAREL (CLOTH, FUR, SHOES) TEXT

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	213.90 \$M	194.70 \$M	154.00 \$M	161.00 \$M
Canadian Exports	52.10 \$M	45.40 \$M	48.50 \$M	50.80 \$M
Canadian Share of Market	24.40 %	23.30 %	31.50 %	31.60 %

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

Major Competing Countries

Market Share

GERMANY WEST	22.00 %
ITALY	12.40 %
GREECE	10.00 %
FRANCE	6.40 %
DENMARK	6.40 %
UNITED KINGDOM	6.10 %

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

Products/services for which there are good market prospects:

1. Fur apparel

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- _____
- _____

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BERNE

Market: SWITZERLAND

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

Activity: Complete report on market for fur goods.

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

Activity: Recruiting of buyers for IFF Montreal May 1990.

Expected Results: Select 2-3 buyers to attend fair.

Activity: Calls on Swiss fur industry.

Expected Results: Compile report on interviews & alert Cdn export. to requirem.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BERNE

Market: SWITZERLAND

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: LEISURE PROD. TOOLS HARDWARE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	197.00 \$M	191.10 \$M	157.50 \$M	164.50 \$M
Canadian Exports	2.20 \$M	2.50 \$M	2.90 \$M	3.10 \$M
Canadian Share of Market	1.10 %	1.30 %	1.80 %	1.90 %

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

Major Competing Countries

Market Share

GERMANY WEST	24.00 %
AUSTRIA	23.30 %
FRANCE	18.10 %
TAIWAN	7.90 %
ITALY	6.00 %
UNITED STATES OF AMERICA	5.90 %

Current Status of Canadian

exports in this sector/subsector: Well established and growing

Products/services for which there are good market prospects:

1. Ice hockey equipment
2. Curling equipment
3. Surf and snowboards

Factors contributing to current successful Canadian exports:

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BERNE

Market: SWITZERLAND

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- _____
- _____

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

Activity: Promote CSGA fair, Mtl. Feb. 90 and recruit buyers.
Expected Results: 2-3 new agencies + 3-4 new buying connections.

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

Activity: Prefair mailing ISPO Munich Sept. 90 + Feb. 91.
Expected Results: Alert 25-35 new companies to Cdn participation in ISPO.

Activity: Visit to Swisspo Trade Fair Zurich 91.
Expected Results: Identify 8-10 new outlets.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BERNE

Market: SWITZERLAND

Sector : EDUCATION, MEDICAL, HEALTH PROD

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

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	741.00 \$M	550.00 \$M	434.40 \$M	440.00 \$M
Canadian Exports	3.50 \$M	3.20 \$M	4.50 \$M	5.60 \$M
Canadian Share of Market	0.47 %	0.58 %	1.03 %	1.30 %

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

Major Competing Countries

Market Share

GERMANY WEST	50.00 %
UNITED STATES OF AMERICA	17.00 %
FRANCE	0.80 %
AUSTRIA	0.50 %
NETHERLANDS	0.50 %
UNITED KINGDOM	0.50 %

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

Products/services for which there are good market prospects:

1. Orthopaedic appliances, aids.
2. Artificial parts for the body.

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Trade Fair activity

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- _____
- _____

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BERNE

Market: SWITZERLAND

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

Activity: Participation with infobooth and catalogue at IFAS '90.
Expected Results: Identify 30-50 agents or specific products needs.

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

Activity: Prepare report on market medic/hospit. equipment.
Expected Results: Distrib. to Cdn exporters. Increased interest in Swiss Market

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BERNE

Market: SWITZERLAND

Sector : INDUSTRIAL MACHIN, PLANTS, SERV.

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	8717.00 \$M	9875.00 \$M	8735.00 \$M	9609.00 \$M
Canadian Exports	38.40 \$M	28.30 \$M	26.00 \$M	30.00 \$M
Canadian Share of Market	0.44 %	0.28 %	0.30 %	0.31 %

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

Major Competing Countries

Market Share

GERMANY WEST	43.60 %
ITALY	10.20 %
UNITED STATES OF AMERICA	9.00 %
FRANCE	7.50 %
UNITED KINGDOM	6.60 %
JAPAN	5.10 %

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

Products/services for which there are good market prospects:

1. Motors
2. Woodworking machinery
3. Forgings, Castings

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- _____
- _____

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BERNE

Market: SWITZERLAND

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

- Activity: Identify niches for special machinery by processing and following-up on positive answers (67 out 572) received
Expected Results: Greater penetration of Canadian products into this very
- Activity: from the Swiss Association of Machinery Manufacturers in reply to a questionnaire sent out in Aug. 89, supported by
Expected Results: specialized Swiss industrial sector through identification
- Activity: regular trade visits.
Expected Results: of niches.

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: BERNE

Country: SWITZERLAND

The mission reports that the approximate flows to all countries of investment from its country/territory in Canadian \$ is as follows: (including portfolio flows if a primary focus)

	Total (\$ Million)	Canadian Share	Major Competitor Share
Two years ago	4.30	1.50	20.00
One year ago	3.63	2.00	20.00
Current year	4.50	1.50	25.00

The mission is of the opinion that Canada can reasonably expect to attract the following amount of foreign investment from its territory/country next year:

35 million \$

Canada's major competitors for investment from this territory/country are:

- F R G
- U S A
- U K
- N L
- FRANCE

The following types of activities are currently being undertaken by Canada's major competitors to attract investment from this territory/country:

1. Mostly company to company promotion of "climate"
2. Visits by state organizations, involving use of private companies and hard sell on specific opportunities.
3. Chamber of Commerce promotion, distribution of promo news letter, visits by regional Ind. Development Officers.

IDP Partners and related program activities:

Canadian Swiss Association

- Provide respected venue for keynote speakers.

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: BERNE

Country: SWITZERLAND

IDP Partners and related activities cont d:

Royal Bank/CIBC/Dominion Securities/Royal Trust Bank, etc CH
 - Assist in making contacts at senior levels.

World Economic Forum
 - DAVOS Symposium 1990

O S E C (Swiss Association for Trade Development)
 - Publish Investment Opportunities

Provincial Government of Ontario, Quebec, BC, NB, Sask, Alta
 - Coordination of Federal/Provincial Activity

Compared to major competitive destinations, Canada is perceived to have
 the following advantages:

- More European than USA in business methods
- Good place to live

the following constraints:

- Small and widely spread market
- Wage rates are high
- Lack of skilled craftsmen
- Extent of government imposed requirements
- FTA with USA

The mission indicates the following potential for various types
 of investment from within its territory/country:

Type of Investment	Potential
Portfolio	MEDIUM
Acquisition	MEDIUM
Greenfield	LOW
Joint Venture	MEDIUM
Strategic Partnering	LOW
Technology Licensing	MEDIUM

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RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: BERNE

Country: SWITZERLAND

The mission believes that the following sectors are of greatest interest to investors in its territory/country an assigned ranking A = High B = Medium C = Low

Sector	Ranking
Agriculture/Food/Fish	A
Resource Processing	B
Machinery and Equipment	A
Transportation	B
Consumer Products	B
Commercial Service	B
Computer and Communications	C
Health Care Products/Medical	A
Aerospace and Defence	A
Strategic Technologies	C

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: BERNE

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

Seq #	Date
Type: MISSION OUT, MINISTERIAL	
4	05/90
Event Description: Ministerial Presentation	
City : Zurich, Geneva	
Country : SWITZERLAND	
Investment Nature: Portfolio	
Investment Sector: AREOSPACE/DEFENCE	
Event Cooperants :	
C S A (Canadian Swiss Association)	
Estimated Budget : \$2,000.00	
Type: DIRECT MAIL CAMPAIGN	
3	05/90
Event Description: Direct Mailing	
City :	
Country : SWITZERLAND	
Investment Nature: Portfolio	
Joint-venture	
Partnership	
Investment Sector: AREOSPACE/DEFENCE	
Event Cooperants :	
Estimated Budget : \$2,000.00	
Type: OUTCALL PROGRAM	
1	01/91
Event Description: DAVOS SYMPOSIUM	
City : Davos	
Country : SWITZERLAND	
Investment Nature: various	
Investment Sector: STRATEGIC TECHNOLOGIES	
Event Cooperants :	
WEF/INV. CDA	
Estimated Budget : \$22,000.00	

Total estimated budget for all proposals: \$26,000.00

DEPARTMENT OF EXTERNAL AFFAIRS

PEMD - Proposed Government Promotional Activities 1990/91

Proposals As Of December 23/89

Post: Berne

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Contact</u>
90/05/02	European Buyers To The CDN. Int'l Fur Fair, Montreal Mission In, To Fair	Consumer Products
90/08/16	European Buyers To Food Pacific, Vancouver, B.C. Mission In, To Fair	Agri & Food Products & Services
90/09/04	Swiss Data '90 Basel, Switzerland Info Booth, Only	Advanced Tech. Products & Services
90/11/06	IFAS(Int'l Fair For Hospital & Medical Eqpt), Zurich, Switz. Info Booth, Only	Education, Medical, Health Products
91/02/00	European Buyers To CSGA (CDN Sporting Goods Assoc). Montreal Mission In, To Industry	Consumer Products

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: BONN

Country: GERMANY WEST

The FRG is the economic powerhouse of Western Europe and, after the USA and Japan, the strongest economy in the world. Its GNP in 1988 amounted to approximately Cdn \$ 1,400 billion (Canada: \$580 billion). The economy has grown uninterrupted since 1982, and in the past two years has enjoyed a remarkable boom. GNP rose 3.6% in real terms in 1988, will rise approximately 4% in 1989 and is forecast to rise 3% in 1990. Economic growth continues to be driven mainly by export demand and investment. However, domestic consumer demand, already increasing, will become still stronger in 1990, partly as a result of new tax cuts. Unemployment has been declining slowly and is now at 7.5%.

The German economy is dominated by the manufacturing sector, and the FRG is a world leader in production of machinery, motor vehicles and chemicals. On the other hand, some sectors, notably agriculture, transport, coal, shipbuilding, and communications are protected by heavy government subsidies and an exceptionally high degree of regulations. There is an outstanding infrastructure of communications and transportation networks and an educational and occupational training system that is the envy of the FRG's economic competitors.

Like Canada, the FRG economy is exceptionally trade oriented, with exports accounting for more than one quarter of GNP. It is the largest exporter in the world, and by the same token is a major net exporter of capital. It is also the world's second largest importer. By and large German markets are relatively open and economic policy strongly favours trade liberalization through the GATT and the Uruguay Round (an important exception is agriculture). The FRG is a force behind European economic integration and the move towards the 1992 Single Market.

Against this background of a large and strong technologically advanced economy, a mainly open-doors trade policy, continuing major capital exports and growing imports, the prospects should be outstanding for improved Canadian exports, increased investment in Canada and enhanced technology flows.

The achievement of these objectives however will still require great efforts. Trade policy impediments created through EC's Common Agricultural Policy, various technical barriers to trade (e.g. standards) and protective government subsidies and regulations in some sectors will demand sustained pressure on the German government (and in coordination with BREEC and other posts, on the EC as a whole) as well as a close following of market evolution to identify niches. On the investment side, knowledge of Canada is growing with our active IDP and there have been some substantial deals and favourable investment decisions made, especially since the FTA, but we still have not broken into the front ranks as a host for FRG foreign direct investment (with the USA and other EC countries). Similarly the considerable potential for increased technology flows and joint S&T could be more fully realized with greater use of the TIP program, and improved support (e.g. through seed funding for travel of Canadian scientists and technical experts).

Most of all, however, what is needed is determination on the part of Canadians, especially in the private sector, to take advantage of the economic opportunities offered by the FRG.

In short, the main obstacles to expanding economic relations are on

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RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: BONN

Country: GERMANY WEST

the Canadian side.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 EXPORT PROMOTION PRIORITIES

Mission: BONN

Country: GERMANY WEST

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

1. DEFENCE PROGRAMS, PRODUCTS, SERV

FRG defence spending coupled with bilateral research development production agreement offer excellent opportunities. There is also a rapidly growing market for security systems and components.

2. ADVANCED TECH. PROD. & SERV

New opportunities in the telecommunications sector are arising as the result of the deregulation of the communications sector in the FRG. Environmental technology is also emerging as a new sector of opportunity.

3. MULTIPLE SECTORS

With the approach of EC-92 new opportunities are emerging in the FRG on a multi sector basis. This post will focus its efforts on new opportunities in Hessen, Rheinland-Pfalz and Saarland.

4.

5.

6.

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

1. FOREST PRODUCTS, EQUIP, SERVICES
2. MINE, METAL, MINERAL PROD & SRV
3. GRAINS AND OILSEEDS

4. FISHERIES, SEA PRODUCTS & SERV.
5. DEFENCE PROGRAMS, PRODUCTS, SERV
6. TRANSPORT SYS, EQUIP, COMP, SERV.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BONN

Market: GERMANY WEST

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: MARINE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1050.00 \$M	1100.00 \$M	1150.00 \$M	1200.00 \$M
Canadian Exports	3.00 \$M	4.00 \$M	4.50 \$M	5.00 \$M
Canadian Share of Market	0.28 %	0.36 %	0.43 %	0.45 %

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

Major Competing Countries

Market Share

GERMANY WEST	85.00 %
UNITED STATES OF AMERICA	5.00 %
UNITED KINGDOM	2.00 %
FRANCE	2.00 %
NETHERLANDS	1.00 %
SWEDEN	1.00 %

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

Products/services for which there are good market prospects:

1. Helicopter recovery systems
2. On-board helicopter hangars
3. Anti-submarine electronics
4. Radar electronics
5. Mine countermeasures
6. Shipborne surveillance systems

Factors contributing to current successful Canadian exports:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BONN

Market: GERMANY WEST

Factors for Canadian exports not reaching market potential:

- Limited appreciation/understanding of distribution system

-

-

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

Activity: Anti-submarine warfare mission to FRG.
Expected Results: Identify new areas of cooperation.

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

Activity: Defence trade mission to Canada 1990.
Expected Results: Identify new areas of cooperation.

Activity: International shipping and marine show Hamburg 1990.
Expected Results: Introduce new Cdn companies to market.

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

Activity: Report on potential opportunities presented by NFR-90 program.
Expected Results: Identification of new market opportunities.

Activity: Presentation of Cdn capabilities to NFR-90 team.
Expected Results: Greater awareness of Cdn capabilities.

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BONN

Market: GERMANY WEST

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

NFR-90 Nato frigate

Approximate Value: 0 M\$

Financing Source :

Contact : External Affairs, Ottawa (TAD)

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BONN

Market: GERMANY WEST

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: SECURITY PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	4.75 \$M	5.10 \$M	5.46 \$M	5.75 \$M
Canadian Exports	0.20 \$M	0.20 \$M	0.20 \$M	0.25 \$M
Canadian Share of Market	4.20 %	3.90 %	3.60 %	4.30 %

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

Major Competing Countries

Market Share

GERMANY WEST	70.00 %
UNITED STATES OF AMERICA	10.00 %
UNITED KINGDOM	10.00 %
NETHERLANDS	5.00 %
FRANCE	5.00 %

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

Products/services for which there are good market prospects:

1. Intrusion detection equipment.
2. Access control equipment.
3. Tempest approved equipment.
4. Alarm systems & components.

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- Fairs and Missions support
- Trade Fair activity
- Provincial export promotion
- Strong sectoral capability in Canada

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BONN

Market: GERMANY WEST

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
 - Restrictive standards
 - Limited appreciation/understanding of distribution system
 - Market prospects have not been adequately explored
 - Government procure-
 - ment.
-
-

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

Activity: Call on potential distributors in preparation for Security 90.

Expected Results: Develop better understanding of developments & opportunities

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

Activity: Security 90 Nov 20-23, 1990.

Expected Results: Introduce Canadian companies to FRG.

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

Activity: Market study on specific opportunities in this sector.

Expected Results: Greater awareness in Canada of opportunities in FRG.

Activity: Develop profiles on major distributors of security equipment

Expected Results: Arrange direct contacts with Canadian firms.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BONN

Market: GERMANY WEST

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	38500.00 \$M	38500.00 \$M	40000.00 \$M	40000.00 \$M
Canadian Exports	120.00 \$M	200.00 \$M	150.00 \$M	150.00 \$M
Canadian Share of Market	0.31 %	0.51 %	0.31 %	0.40 %

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

Major Competing Countries	Market Share
GERMANY WEST	80.00 %
UNITED STATES OF AMERICA	10.00 %
FRANCE	2.00 %
UNITED KINGDOM	1.00 %
ITALY	1.00 %

Products/services for which there are good market prospects:

1. Armaments
2. Aircraft
3. Avionics
4. Electronics
5. Simulators
6. Ordnance
7. Vehicles

Factors contributing to current successful Canadian exports:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BONN

Market: GERMANY WEST

Factors for Canadian exports not reaching market potential:

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

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

Activity: Follow-up to RDP meeting in June 1989.
Expected Results: Develop greater understanding in FRG of Cdn offset policy.

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

Activity: Defence Trade Mission to Canada 1990.
Expected Results: New cooperative agreements.

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

Activity: Market report on opportunities in FRG defence sector.
Expected Results: Greater awareness of FRG opportunities by Canadian firms.

Activity: Quarterly call on BWB.
Expected Results: To explore new bidding opportunities introduce new Cdn firms

Activity: Research development and planning meeting October '90.
Expected Results: New opportunities for Canadian firms.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BONN

Market: GERMANY WEST

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: TELECOM, DATACOM, SAT, SPACECOM

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1800.00 \$M	1700.00 \$M	1900.00 \$M	1900.00 \$M
Canadian Exports	31.00 \$M	33.00 \$M	35.00 \$M	35.00 \$M
Canadian Share of Market	1.70 %	1.90 %	1.80 %	1.80 %

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

Major Competing Countries

Market Share

JAPAN	0.00 %
UNITED STATES OF AMERICA	0.00 %
FRANCE	0.00 %
NETHERLANDS	0.00 %
UNITED KINGDOM	0.00 %
ITALY	0.00 %

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

Products/services for which there are good market prospects:

1. Data Telecommunications
2. Mobile Telephone
3. ISDN Products
4. Fibre Optical Equipment

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- Fairs and Missions support
- Trade Fair activity
- Provincial export promotion
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BONN

Market: GERMANY WEST

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
 - Restrictive standards
 - Lack of promotion and advertising
 - Limited appreciation/understanding of distribution system
 - Performance of local agent or representative
 - Complexity of standards.
-

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

Activity: Support two Canadian companies in bid to operate new German private cellular telephone network.
Expected Results: 1 of 2 cos bidding in different consort./awarded licence.

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

Activity: CEBIT 1991 (Hannover).
Expected Results: Identify new market opportunities.

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

Activity: Attend Telematics Trade Fair Sept. 1990 (Stuttgart)
Expected Results: Identify new market opportunities.

Activity: Report effects of deregulation of communication industry on potential Canadian exports.
Expected Results: Identify new market opportunities.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BONN

Market: GERMANY WEST

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: INSTRUMENT & PROCESS CONTROLS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	5900.00 \$M	5400.00 \$M	5400.00 \$M	0.00 \$M
Canadian Exports	11.00 \$M	8.00 \$M	9.00 \$M	0.00 \$M
Canadian Share of Market	0.18 %	0.15 %	0.16 %	0.00 %

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

Major Competing Countries

Market Share

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

Products/services for which there are good market prospects:

1. Sewage/water treatment equipment
2. Air/emissions purification
3. Consulting services
4. Recycling equipment

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Limited Canadian capabilities
- Market prospects have not been adequately explored
- Performance of local agent or representative

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BONN

Market: GERMANY WEST

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

Activity: Oil spill combating equipment seminar - Bremerhaven Dec. 89.
Expected Results: Identify German need for Canadian equipment/technology.

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

Activity: Calls on local environment cos/business associations.
Expected Results: Update intelligence on local needs in sector.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BONN

Market: GERMANY WEST

Sector : MULTIPLE SECTORS

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	65000.00 \$M	66000.00 \$M	67000.00 \$M	68000.00 \$M
Canadian Exports	100.00 \$M	105.00 \$M	106.00 \$M	110.00 \$M
Canadian Share of Market	0.15 %	0.16 %	0.16 %	0.17 %

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

Major Competing Countries

Market Share

GERMANY WEST	65.00 %
EUROPEAN COMMON MARKET C	20.00 %
UNITED STATES OF AMERICA	10.00 %
JAPAN	5.00 %

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

Products/services for which there are good market prospects:

1. Electronics equipment.
2. Telecommunications equipment.
3. Machinery.
4. Service industries.

Factors contributing to current successful Canadian exports:

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BONN

Market: GERMANY WEST

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored
- _____
- _____

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

Activity: Frankfurt Book Fair.
Expected Results: \$ 1 million in sales.

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

Activity: Market report on Hessen, Rheinland-Pfalz and Saarland
Expected Results: Identification of market potential.

Activity: Solo High Technology Canada Trade Show, Mainz.
Expected Results: Raise level of Cdn exposure in German market.

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: BONN

Country: GERMANY WEST

The mission reports that the approximate flows to all countries of investment from its country/territory in Canadian \$ is as follows: (including porfolio flows if a primary focus)

	Total (\$ Million)	Canadian Share	Major Competitor Share
Two years ago	10150.00	2.40	51.20
One year ago	11406.00	1.70	44.50
Current year	11000.00	2.50	43.00

The mission is of the opinion that Canada can reasonably expect to attract the following amount of foreign investment from its territory/country next year:

\$ 450 million

Canada s major competitors for investment from this territory/country are:

- U.S.
- U.K.
- Belgium/Luxembourg
- Italy
- Switzerland
- Netherlands

The following types of activities are currently being undertaken by Canada s major competitors to attract investment from this territory/country:

- National advertizing campaigns
- Seminars
- National presentations at fairs
- Direct mail cpngns, outcalls by nat'l, prov'l, munic'l prmtrs
- Visits of outgoing missions. Visits of incoming missions.

IDP Partners and related program activities:

- German auditing firms.
- Seminars, referrals for prospecting.

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: BONN

Country: GERMANY WEST

IDP Partners and related activities cont d:

Canadian provincial investment promoters.
- Seminars, outcalls.

Canadian municipal promoters.
- Seminars, outcalls.

German banks.
- Outcalls, referrals for prospecting.

German associations.
- Outcalls, referrals for prospecting.

German law firms.
- Outcalls, referrals for prospecting.

German Chambers of Commerce.
- Seminars.

Canadian airlines.
- Writers' visits to Canada.

German entrepreneurs.
- Referrals for prospecting.

German tax advisors.
- Referrals for prospecting.

Compared to major competitive destinations, Canada is perceived to have the following advantages:

- F.T.A.
- Law and order perception.
- European atmosphere perception.
- Political stability.
- Secure raw material base.

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: BONN

Country: GERMANY WEST

the following constraints:

- Strong image of U.S.A.
- Preference for EEC countries.
- Perception of Canada's cold climate.
- Perception of Canada's small market size.
- Absence of news on Canada.

The mission indicates the following potential for various types of investment from within its territory/country:

Type of Investment	Potential
Portfolio	MEDIUM
Acquisition	HIGH
Greenfield	HIGH
Joint Venture	HIGH
Strategic Partnering	HIGH
Technology Licensing	MEDIUM

The mission believes that the following sectors are of greatest interest to investors in its territory/country an assigned ranking A = High B = Medium C = Low

Sector	Ranking
Agriculture/Food/Fish	C
Resource Processing	B
Machinery and Equipment	A
Transportation	A
Consumer Products	C
Commercial Service	C
Computer and Communications	A
Health Care Products/Medical	A
Aerospace and Defence	A
Strategic Technologies	B

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: BONN

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

Seq #	Date
Type: MISSION OUT, INDUSTRY	
4	06/90
Event Description: Mission to City of Hamburg.	
City :	
Country :GERMANY WEST	
Investment Nature:JV	
SP	
Greenfield	
Investment Sector:MULTIPLE INVESTMENT SECTORS	
Event Cooperants :	
City of Vancouver	
Estimated Budget : \$15,000.00	

Type: SEMINAR, ABROAD

1	01/91
Event Description: Seminar	
City :	
Country :GERMANY WEST	
Investment Nature:JV	
Greenfield	
Investment Sector:MULTIPLE INVESTMENT SECTORS	
Event Cooperants :	
ACOA	
Estimated Budget : \$26,000.00	
8	02/91
Event Description: Seminar for prospecting.	
City :Freiburg	
Country :GERMANY WEST	
Investment Nature:JV	
SP	
Greenfield	
Investment Sector:MULTIPLE INVESTMENT SECTORS	
Event Cooperants :	
Estimated Budget : \$3,000.00	

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: BONN

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

Seq #	Date
Type: SEMINAR, ABROAD	
9	03/91
Event Description: Seminar for prospecting.	
City :Berlin	
Country :GERMANY WEST	
Investment Nature:JV	
SP	
Greenfield	
Investment Sector: MULTIPLE INVESTMENT SECTORS	
Event Cooperants :	
Estimated Budget : \$3,000.00	
7	01/91
Event Description: Seminar for prospecting	
City :Kiel	
Country :GERMANY WEST	
Investment Nature:JV	
SP	
Greenfield	
Investment Sector: MULTIPLE INVESTMENT SECTORS	
Event Cooperants :	
Estimated Budget : \$3,000.00	
Type: MISSION IN, TO INDUSTRY	
3	09/90
Event Description: Second investors mission	
City :	
Country :CANADA	
Investment Nature:JV	
Greenfield	
SP*	
Investment Sector: MULTIPLE INVESTMENT SECTORS	
Event Cooperants :	
Estimated Budget : \$40,000.00	

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: BONN

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

Seq #	Date
-------	------

Type: OTHER PROMOTION

- | | |
|---|--|
| <p>2 Event Description: 05/90
 Investment part of Canada Solo Show.
 City :
 Country :GERMANY WEST
 Investment Nature:JV
 Greenfield
 Investment Sector: MULTIPLE INVESTMENT SECTORS
 Event Cooperants :
 Canadian Embassy
 Estimated Budget : \$15,000.00</p> | |
| <p>5 Event Description: 12/90
 Introduce advantages of FTA
 City :
 Country :GERMANY WEST
 Investment Nature:Greenfield
 Investment Sector: MULTIPLE INVESTMENT SECTORS
 Event Cooperants :

 Estimated Budget : \$200,000.00</p> | |
| <p>6 Event Description: 06/90
 Expand computer inventory of German firms.
 City :
 Country :GERMANY WEST
 Investment Nature:
 Investment Sector: MULTIPLE INVESTMENT SECTORS
 Event Cooperants :

 Estimated Budget : \$3,000.00</p> | |

Total estimated budget for all proposals: \$308,000.00

DEPARTMENT OF EXTERNAL AFFAIRS

PEMD - Proposed Government Promotional Activities 1990/91

Proposals As Of December 23/89

Post: Bonn

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Contact</u>
90/04/02	Tube & Wire 90 Dusseldorf, Frg. Info Booth, Only	Mine, Metal, Mineral Products & Service
90/09/04	ISPO Fall 90 (Sports Equip. Fair), Munich, Frg. Fair, National Stand	Consumer Products
90/09/11	Automechanika 90, Frankfurt, Frg. Fair, National Stand	Transport System, Equip, Comp, Services W. Heslop
90/10/03	Frankfurt Book Fair 90 Frankfurt, Frg. Fair, National Stand	Consumer Products
90/11/20	Security 90 Essen, Frg. Info Booth, Only	Defence Programs, Products & Services
90/11/21	Medica 90 Munich, Frg. Info Booth, With Group	Education, Medical, Health, Products
91/01/16	Bau'91 (Building Material, Systems & Renovation) Munich Info Booth, With Group	Forest Products, Equip, & Services
91/02/19	Domotechnika 91 Cologne, Frg. Info Booth, With Group	Consumer Products
91/02/21	ISPO (Spring) 91 (Sports Equipment), Munich, Frg. Fair, National Stand	Consumer Products

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: DUSSELDORF

Country: GERMANY WEST

The FRG is the economic powerhouse of Western Europe and, after the USA and Japan, the strongest economy in the world. It's GNP in 1988 amounted to approximately Cdn \$1,400 billion (Canada: \$580 billion). The economy has grown uninterruptedly since 1982, and in the past two years has enjoyed a remarkable boom. GNP rose 3.6% in real terms in 1988, will rise approximately 4% in 1989 and is forecast to rise 3% in 1990. Economic growth continues to be driven mainly by export demand and investment. However, domestic consumer demand, already increasing, will become still stronger in 1990, partly as a result of new tax cuts. Unemployment has been declining slowly and is now at 7.5%.

The planned Trade and Industrial Development activities of the Dusseldorf post reflect the increased trade opportunities from this buoyant German economic situation. The German housing market is booming and our lumber suppliers have excellent chances to increase sales, with traditional soft-wood shipments being supplemented by aggressive marketing of Eastern Canadian hardwoods. Our trade fair and mission program for 1990-91 reflects our dedication to this sub-sector.

Germany remain's the EEC'S top consumer of paper products (191 kg per capita), and Canada holds its position as leading supplier of market pulp (1988-737,300 tonnes or 26.5 % of total imports-bleached, sulphate). The market out-look remains positive with some attention paid to environmental concerns. We will report on these developments as well as recommend to the industry a promotion for customers.

Fish consumption has attained its pre-nematode-scare level and Canadian exporters of quality fish and seafood products should build on the \$50 million level of 1988. Our modest food exports should be increased through the exposure at Anuga '89 and, more directly, through the Tengelmann Canada Promotion in Oct 1990.

German Capital goods manufacturers and project contractors are working near capacity limits. Canadian engineering companies and manufacturers have additional opportunities to increase their participation as project sub-suppliers and consortium partners across a range of sub-sectors. Germany remains a high-cost manufacturer and companies are willing to consider foreign sub-contractors with financing, as an alternative to local expansion.

Environmental industries are well-established in Germany and the market is growing (current market size - DM 32.5 bln per year). Individual quality Canadian companies (esp. engineering) should find niche opportunities. Germany remains a reservoir for industrial coop., technology transfer. Through Globe 90 and individual company initiatives we expect to generate a number of business arrangements.

Germany remains a large if competitive market for quality consumer products. Whether fashion, furniture or recreational products, Canadian companies, introduced through trade fairs and tailor made programs, will discover market development opportunities. We will be probing these opportunities in a more dedicated way with BOAT 89 + 90, the Cologne Furniture show, the IGEDO fashion event, and the Cologne recreational goods show, SPOGA.

Our program activities reveal diverse and extensive Canadian export opportunities. A major challenge remains the increased involvement of leading

04/12/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: DUSSELDORF

Country: GERMANY WEST

Canadian companies in the exploitation of these opportunities.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 EXPORT PROMOTION PRIORITIES

Mission: DUSSELDORF

Country: GERMANY WEST

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

1. INDUSTRIAL MACHIN, PLANTS, SERV.
 strength of German marketing and support of EDC financing (for third country)
 pricing and exchange rates not a disadvantage
 large domestic German market for specialized, high quality machinery
 first-class industrial trade fairs of international marketing importance
2. FOREST PRODUCTS, EQUIP, SERVICES
 price competitiveness
 large market for building materials and paper products.
 special qualities of hemlock and cedar
 launch of equipment and engineering exports for Eastern Europe market
3. FISHERIES, SEA PRODUCTS & SERV.
 diversify markets for Cdn. seafood products
 large market has recovered and good distribution network exists - new direct buying by retailers
 Germany as source of product-enhancing technology (i.e. processing)
4. AGRI & FOOD PRODUCTS & SERVICE
 large domestic market with good distribution network
 competitive pricing in Cdn \$
5. CONSUMER PRODUCTS & SERVICES
 Sial in Paris (Oct 1990) together with the promotion through the Tenegelman retail chain.

6.

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

- | | |
|-------------------------------------|--------------------------------------|
| 1. FOREST PRODUCTS, EQUIP, SERVICES | 4. FISHERIES, SEA PRODUCTS & SERV. |
| 2. MINE, METAL, MINERAL PROD & SRV | 5. DEFENCE PROGRAMS, PRODUCTS, SERV |
| 3. GRAINS AND OILSEEDS | 6. TRANSPORT SYS, EQUIP, COMP, SERV. |

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DUSSELDORF

Market: GERMANY WEST

Sector : MINE,METAL,MINERAL PROD & SRV

Sub-Sector: MINERALS AND MINERAL PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1220.00 \$M	1450.00 \$M	1550.00 \$M	1550.00 \$M
Canadian Exports	84.00 \$M	115.00 \$M	125.00 \$M	125.00 \$M
Canadian Share of Market	6.80 %	7.90 %	8.10 %	8.10 %

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

Major Competing Countries

Market Share

EUROPEAN COMMON MARKET C	20.00 %
EUROPE	15.00 %
SOUTH AFRICA	10.00 %
UNITED STATES OF AMERICA	10.00 %
OTHER COUNTRIES	5.00 %
AUSTRIA	5.00 %

Products/services for which there are good market prospects:

1. Zinc
2. Lead
3. Copper
4. Molybdenum
5. Coal

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- _____
- _____

04/12/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DUSSELDORF

Market: GERMANY WEST

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

Activity: Canadian export business this sector well-established or limited by coal import quotas.

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

Activity: Occasional reporting on German coal situ.
Expected Results: Cdn. coal exporters can evaluate marketing strategy.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DUSSELDORF

Market: GERMANY WEST

Sector : INDUSTRIAL MACHIN, PLANTS, SERV.

Sub-Sector: OTHER EQUIP, MACH NOT ELS SPE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	0.00 \$M	4700.00 \$M	5100.00 \$M	5500.00 \$M
Canadian Exports	0.00 \$M	5.00 \$M	7.00 \$M	10.00 \$M
Canadian Share of Market	0.00 %	21.00 %	21.00 %	21.00 %

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

Major Competing Countries

Market Share

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

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

Products/services for which there are good market prospects:

1. Water Purification
2. Toxix waste handling
3. Air purification

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Competitive pricing

Factors for Canadian exports not reaching market potential:

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

04/12/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DUSSELDORF

Market: GERMANY WEST

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

Activity: Environmental equipment and services Matchmaker Nov. 10/89.
Expected Results: New bus. connect'ns. Represent'n agreements. Techn transfer.

Activity: Non-funded mission to Globe 90, March 1990.
Expected Results: Introd'n to Cdn ind'l capab. Techn. transfer & investment.

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

Activity: Structured calls on environmental cos.
Expected Results: Co. profiles as ref. for HQ + Cdn cos. -ident.ind.coop.opps.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DUSSELDORF

Market: GERMANY WEST

Sector : INDUSTRIAL MACHIN, PLANTS, SERV.

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	11688.00 \$M	13750.00 \$M	15625.00 \$M	16875.00 \$M
Canadian Exports	100.00 \$M	70.00 \$M	80.00 \$M	110.00 \$M
Canadian Share of Market	0.90 %	0.50 %	0.50 %	0.70 %

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

Major Competing Countries	Market Share
FRANCE	0.00 %
ITALY	0.00 %
UNITED KINGDOM	0.00 %

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

Products/services for which there are good market prospects:

1. Engineering Services
2. Forest Products Equipment
3. Power + Energy Equipment
4. Oil + Gas Products

Factors contributing to current successful Canadian exports:

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DUSSELDORF

Market: GERMANY WEST

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Limited Canadian capabilities
- Market prospects have not been adequately explored
- _____
- _____

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

Activity: Liaison calls on 5 major contracting firms.
Expected Results: -introduction of cdn supply capab./fin. -buying connections.

Activity: Meetings with three major countertrade organizations.
Expected Results: -report on current developments this trading practice.

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

Activity: Promotion of German visitors to National Petroleum Show in Calgary.

Expected Results: New buying connections for mid-east and USSR projects.

Activity: Calls on German participants to World Energy Conference in Montreal, September 1989.

Expected Results: Report on any new bus. activity. sub-supply Cdn power gene'n

Activity: Alert Cdn capital goods and services exporters to project opportunities in cooperation with German contractors.

Expected Results: Individual co. meetings in FRG. 3-4 new buying connections.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DUSSELDORF

Market: GERMANY WEST

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

Oil field developments in Iraq with Mannesmann
Approximate Value: 800 M\$
Financing Source : NFR - No external fnding req'd
Contact : Consulate General Dusseldorf

East-west pipeline in Saudi-Arabia with Mannesmann
Approximate Value: 500 M\$
Financing Source : NFR - No external fnding req'd
Contact : Consulate General Dusseldorf

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: DUSSELDORF

Country: GERMANY WEST

The mission reports that the approximate flows to all countries of investment from its country/territory in Canadian \$ is as follows: (including portfolio flows if a primary focus)

	Total (\$ Million)	Canadian Share	Major Competitor Share
Two years ago	10150.00	2.40	51.20
One year ago	11406.00	1.70	44.50
Current year	11000.00	2.50	43.00

The mission is of the opinion that Canada can reasonably expect to attract the following amount of foreign investment from its territory/country next year:

\$450 million.

Canada's major competitors for investment from this territory/country are:

- U.S.
- U.K.
- Belgium/Luxemburg
- Italy
- Switzerland
- Netherlands

The following types of activities are currently being undertaken by Canada's major competitors to attract investment from this territory/country:

- National advertising campaigns. Seminars
- National presentations at fairs. Direct mail campaigns, outcalls by national provincial, municipal promoters.
- Visits of outgoing missions.
- Visits of incoming missions.

IDP Partners and related program activities:

- German auditing firms.
- Seminars, referrals for prospecting.

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: DUSSELDORF

Country: GERMANY WEST

IDP Partners and related activities cont d:

Canadian provincial investment promoters.

- Seminars, outcalls.

Canadian municipal promoters.

- Seminars, outcalls

German banks

- Outcalls, referrals for prospecting.

German associations.

- Outcalls, referrals for prospecting.

German law firms.

- Outcalls, referrals for prospecting.

German Chambers of Commerce

- Seminars

Canadian airlines

- Writers' visits to Canada.

German entrepreneurs

- Referrals for prospecting.

German tax advisors

- Referrals for prospecting.

Compared to major competitive destinations, Canada is perceived to have

the following advantages:

- F.T.A.
- Law and order perception.
- European atmosphere perception.
- Political stability.
- Secure raw material base.

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: DUSSELDORF

Country: GERMANY WEST

the following constraints:

- Strong image of U.S.A.
- Preference for EEC countries.
- Perception of Canada's cold climate.
- Perception of Canada's small market size.
- Absence of news on Canada.

The mission indicates the following potential for various types of investment from within its territory/country:

Type of Investment	Potential
Portfolio	MEDIUM
Acquisition	HIGH
Greenfield	HIGH
Joint Venture	HIGH
Strategic Partnering	HIGH
Technology Licensing	MEDIUM

The mission believes that the following sectors are of greatest interest to investors in its territory/country an assigned ranking A = High B = Medium C = Low

Sector	Ranking
Agriculture/Food/Fish	C
Resource Processing	B
Machinery and Equipment	A
Transportation	A
Consumer Products	C
Commercial Service	C
Computer and Communications	A
Health Care Products/Medical	A
Aerospace and Defence	A
Strategic Technologies	B

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: DUSSELDORF

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

Seq #	Date
Type: MISSION OUT, INDUSTRY	
4	06/90
Event Description: Mission to City of Hamburg	
City :	
Country :GERMANY WEST	
Investment Nature:JV	
SP	
Greenfield	
Investment Sector:MULTIPLE INVESTMENT SECTORS	
Event Cooperants :	
City of Vancouver	
Estimated Budget : \$15,000.00	
Type: SEMINAR, ABROAD	
1	01/91
Event Description: Seminar	
City :	
Country :GERMANY WEST	
Investment Nature:JV	
Greenfield	
Investment Sector:MULTIPLE INVESTMENT SECTORS	
Event Cooperants :	
ACOA	
Estimated Budget : \$26,000.00	
8	02/91
Event Description: Seminar for prospecting	
City :Freiburg	
Country :GERMANY WEST	
Investment Nature:JV	
SP	
Greenfield	
Investment Sector:MULTIPLE INVESTMENT SECTORS	
Event Cooperants :	
Estimated Budget : \$3,000.00	

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: DUSSELDORF

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

Seq #	Date
-------	------

Type: SEMINAR, ABROAD

7	Event Description: Seminar for prospecting City :Kiel Country :GERMANY WEST Investment Nature:JV SP Greenfield Investment Sector: MULTIPLE INVESTMENT SECTORS Event Cooperants : Estimated Budget : \$3,000.00	01/91
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9	Event Description: Seminar for prospecting City :Berlin Country :GERMANY WEST Investment Nature:JV SP Greenfield Investment Sector: MULTIPLE INVESTMENT SECTORS Event Cooperants : Estimated Budget : \$3,000.00	03/91
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Type: MISSION IN, TO INDUSTRY

3	Event Description: Second investors mission City : Country :CANADA Investment Nature:JV Greenfield SP Investment Sector: MULTIPLE INVESTMENT SECTORS Event Cooperants : Estimated Budget : \$40,000.00	09/90
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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: DUSSELDORF

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

Seq #	Date
Type: OTHER PROMOTION	
2	05/90
Event Description: Investment part of Canada Solo Show	
City :	
Country :GERMANY WEST	
Investment Nature:JV	
Greenfield	
Investment Sector:MULTIPLE INVESTMENT SECTORS	
Event Cooperants :	
Canadian Embassy	
Estimated Budget : \$15,000.00	
5	12/90
Event Description: Introduce advantages of FTA	
City :	
Country :GERMANY WEST	
Investment Nature:Greenfield	
Investment Sector:MULTIPLE INVESTMENT SECTORS	
Event Cooperants :	
Estimated Budget : \$200,000.00	
6	06/90
Event Description: Expand computer inventory of German firms	
City :	
Country :GERMANY WEST	
Investment Nature:	
Investment Sector:MULTIPLE INVESTMENT SECTORS	
Event Cooperants :	
Estimated Budget : \$3,000.00	

Total estimated budget for all proposals: \$308,000.00

DEPARTMENT OF EXTERNAL AFFAIRS

PEMD - Proposed Government Promotional Activities 1990/91

Proposals As Of December 23/89

Post: Dusseldorf

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Contact</u>
90/04/00	German Retailers For Sports-wear Fashions To Montreal Mission In, To Industry	Consumer Products
90/04/27	Drupa'90 - Dusseldorf, Frg. Fair, National Stand	Industrial Machine, Plants & Services H. Schroeter
90/05/22	I.F.A.T. 90 (Int'l Trade Fair For Waste Disposal) Munich, Frg. Info Booth, Only	Industrial Machine, Plants & Services
90/05/22	Water Treatment Mission To I.F.A.T. 90, Munich, Frg. Mission Out, Industry	Industrial Machine, Plants & Services
90/06/07	Interpack'90 (Packaging Machinery) Dusseldorf, Frg. Fair, National Stand	Industrial Machine, Plants & Services H. Schroeter
90/06/14	Holzbau & Ausbau Munich, Frg. Info Booth, Only	Construction Industry
90/09/00	Fish & Seafood Processors From Germany Mission In, To Industry	Fisheries, Sea Products & Services
90/09/25	SM' 90 (Shipping & Marine Technology Market), Hamburg, Frg. Info Booth, Only	Oil & Gass Equip, Services
90/10/00	Defence Trade Mission From Germany To Montreal & Toronto Mission In, To Industry	Defence Programs, Products & Services
90/10/09	Metav 90 Dusseldorf, Frg. Info Booth, Only	Industrial Machine, Plants & Services
90/10/22	Systec 90 Munich, Frg. Info Booth, With Group	Advanced Tech. Products & Services

90/11/06	Electronica '90, Munich, Frg. Fair, National Stand	Advanced Tech.Products & Services G.Cote/S.Waterfall
91/01/19	Boot 91 Dusseldorf, Frg. Info Booth, With Group	Consumer Products
91/03/03	International Hardware Fair Cologne, Frg. Fair, National Stand	Consumer Products
91/03/13	Cebit 91 Hannover, Frg. Fair, National Stand	Advanced Tech.Products & Services

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: MUNICH

Country: GERMANY WEST

The FRG is the economic powerhouse of Western Europe and, after the USA and Japan, the strongest economy in the world. Its GNP in 1988 amounted to approximately Cdn. \$1,400 billion (Canada: \$580 billion). The economy has grown uninterrupted since 1982, and in the past two years has enjoyed a remarkable boom. GNP rose 3.6% in real terms in 1988, will rise approx. 4% in 1989 and is forecast to rise 3% in 1990. Economic growth continues to be driven mainly by export demand and investment. However, domestic consumer demand, already increasing, will become still stronger in 1990, partly as a result of new tax cuts. Unemployment has been declining slowly and is now at 7.5%.

The German economy is dominated by the manufacturing sector, and the FRG is a world leader in production of machinery, motor vehicles and chemicals. On the other hand, some sectors, notably agriculture, transport, coal, shipbuilding, and communications are protected by heavy government subsidies and an exceptionally high degree of regulations. There is an outstanding infrastructure of communications and transportation networks and an educational and occupational training system that is the envy of the FRG's economic competitors.

By and large German markets are relatively open and economic policy strongly favours trade liberalization through the GATT and the Uruguay Round (an important exception is agriculture). The FRG is a force behind European economic integration and the move towards the 1992 Single Market. Against this background of a large and strong technologically advanced economy, a mainly open-doors trade policy, continuing major capital exports and growing imports, the prospects for Munich's priority sectors i.e. automotive, aerospace, telecommunications, computers and software and leisure products, are mixed.

The world and European automotive industry continues to restructure and move to new materials and new technologies putting ever greater demands on suppliers. Product development horizons of 2 to 3 years and the pressing need for investment in development capabilities in Canada will continue to guide our efforts in this sector where we will work to attract investment to Canada and to position existing Canadian suppliers in the new model programs of Volkswagen and Daimler Benz. In the aerospace sector the scarcity of major new projects and the rationalization of the industry through the aggressive Daimler-Benz acquisition program will guide our behaviour. Our objective will be to work with the newly formed company Deutsche Aerospace (DASA) to maximize possible Canadian content on the Messerschmidt-Boelkow-Blohm (MBB) MPC-75 project including the possible cooperative development of the aircraft itself between Messerschmidt-Boelkow-Blohm and Canadair.

In the telecommunications/datacommunications sector the continued liberalization of the market and the push by foreign firms for the acceptance of new communications technology in Germany will increase the possibility of success for Canadian firms in this market (including informatics). Our goal will be to aggressively pursue opportunities in the enhanced services area (particularly in the area of mobile communications) via the direct introduction of Canadian firms and products using missions, trade fairs and a mini show. The affluence and "greying"

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: MUNICH**Country: GERMANY WEST**

of German society is bringing about changes in the demand for leisure products. In sporting goods the demand is for stylish, quality products. We think we can take advantage of this by helping Canadian suppliers move upscale through aggressive trade fair participation and strong local representation. The German drive to keep its manufacturing sector competitive has opened wide opportunities for Canadian software, instrumentation and process control products. Firms in these fields are highly specialized and so we will assist them individually in our effort to establish a collective reputation for Canadian capability in these fields.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 EXPORT PROMOTION PRIORITIES

Mission: MUNICH

Country: GERMANY WEST

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

1. TRANSPORT SYS, EQUIP, COMP, SERV.
Duty remission MOU's with Daimler Benz, VW and BMW. Strong market demand. Establ. Canadian presence in market.
2. ADVANCED TECH. PROD. & SERV
German Post Office liberalizing market, Cdn firms strong in this sector, market looking for new technology.
German aerospace industry needs partners to undertake new project.
Strong demand for civ. pass. aircraft.
Affluent market upscale with niche opportunities.
3. MULTIPLE SECTORS
4. CONSUMER PRODUCTS & SERVICES
- 5.
- 6.

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

- | | |
|--------------------------------------|---------------------|
| 1. TRANSPORT SYS, EQUIP, COMP, SERV. | 4. MULTIPLE SECTORS |
| 2. ADVANCED TECH. PROD. & SERV | 5. |
| 3. CONSUMER PRODUCTS & SERVICES | 6. |

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MUNICH

Market: GERMANY WEST

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: TELECOM, DATACOM, SAT, SPACECOM

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	7700.00 \$M	8500.00 \$M	7800.00 \$M	8100.00 \$M
Canadian Exports	31.00 \$M	32.00 \$M	40.00 \$M	46.00 \$M
Canadian Share of Market	0.40 %	0.40 %	0.51 %	0.57 %

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

Major Competing Countries Market Share

GERMANY WEST	78.00 %
JAPAN	4.00 %
UNITED STATES OF AMERICA	2.00 %
FRANCE	1.60 %
NETHERLANDS	1.00 %
UNITED KINGDOM	0.60 %

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

Products/services for which there are good market prospects:

1. Data Telecommunications
2. Digital Communications Products
3. Mobile Radio

Factors contributing to current successful Canadian exports:

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

22/12/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MUNICH

Market: GERMANY WEST

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
 - Limited appreciation/understanding of distribution system
 - Market prospects have not been adequately explored
 - Performance of local agent or representative
 - Local standards, compliance reqits.
 -
-

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

Activity: Cebit 91
Expected Results: Introduction of 4 new Cdn firms to the FRG market

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

Activity: May 90 Mini Solo Show on mobile radio
Expected Results: Introduction of 6 new companies to the FRG market

Activity: Mission on satellite and space communication
Expected Results: Introduction of 5 new companies to the FRG market

Activity: Telecommunication Mission to CEBIT 91
Expected Results: Introduction of 4 new companies

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MUNICH

Market: GERMANY WEST

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: COMPUTERS HARD/SOFTWARE & COMP

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	2660.00 \$M	3090.00 \$M	3010.00 \$M	3330.00 \$M
Canadian Exports	28.00 \$M	33.00 \$M	38.00 \$M	44.00 \$M
Canadian Share of Market	0.10 %	0.10 %	0.12 %	0.13 %

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

Major Competing Countries

Market Share

GERMANY WEST	35.00 %
UNITED STATES OF AMERICA	16.00 %
FRANCE	10.00 %
JAPAN	9.00 %
ITALY	6.00 %
UNITED KINGDOM	4.00 %

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

Products/services for which there are good market prospects:

1. Software
2. CAD/CAM
3. PC-Networking Products
4. PC-ADD-On Products
5. Office Automation

Factors contributing to current successful Canadian exports:

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MUNICH

Market: GERMANY WEST

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored
- Performance of local agent or representative

- _____
 - _____

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

Activity: SYSTEC 90, Munich
 Expected Results: Introduction of 6 CAD/CAM firms to FRG market

Activity: CEBIT 91, Hannover
 Expected Results: Introduction of 5 new companies to the FRG market

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

Activity: Software Mission to SYSTEC 90
 Expected Results: Introduction of 6 new companies to the FRG market

Activity: Software Mission to CEBIT 91
 Expected Results: Introduction of 5 new companies to the FRG market

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MUNICH

Market: GERMANY WEST

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: INSTRUMENT & PROCESS CONTROLS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	0.00 \$M	8201.00 \$M	12000.00 \$M	0.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.00 \$M	0.00 \$M
Canadian Share of Market	0.00 %	0.10 %	0.01 %	0.00 %

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

Major Competing Countries	Market Share
JAPAN	23.00 %
UNITED STATES OF AMERICA	16.00 %
AUSTRIA	15.00 %
ITALY	13.00 %
UNITED KINGDOM	10.00 %
FRANCE	7.00 %

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

Products/services for which there are good market prospects:

1. Measuring/Testing Equipment
2. Sensors
3. Process Controls

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Provincial export promotion
- Competitive pricing
- Strong sectoral capability in Canada

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MUNICH

Market: GERMANY WEST

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Restrictive standards
- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- No product support
- _____
- _____

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

Activity: Assisting firms in direct response to requests

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

Activity: Mission/Seminar Munich, Stuttgart
Expected Results: Introduce 10 Canadian companies to the FRG market

Activity: Report on opportunities for Canadian companies in the
Electronic Instrumentation Sector
Expected Results: Provide Canadian companies with guide on market potential

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MUNICH

Market: GERMANY WEST

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: AUTOMOTIVE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	4760.00 \$M	5120.00 \$M	5510.00 \$M	5700.00 \$M
Canadian Exports	128.00 \$M	160.00 \$M	190.00 \$M	205.00 \$M
Canadian Share of Market	2.68 %	3.12 %	3.44 %	3.59 %

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

Major Competing Countries	Market Share
GERMANY WEST	65.00 %
FRANCE	28.00 %
ITALY	13.00 %
UNITED KINGDOM	13.00 %
UNITED STATES OF AMERICA	8.00 %
AUSTRIA	7.00 %

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

Products/services for which there are good market prospects:

1. Catalytic converters
2. Electric motors
3. Aluminum wheels
4. Clutches
5. Seat belts
6. Glass (windshields)
7. Small stamped parts
8. Electronics in general
9. Complete rubber sealing systems
10. New products with technological advantages
- 11.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MUNICH

Market: GERMANY WEST

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Trade Fair activity
- Competitive pricing
- Strong sectoral capability in Canada
- Bilateral economic trade agreement

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- Limited Canadian capabilities
- High German technical standards
- lack of proximity to assem. plants

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

Activity: Report on the European Automotive Industry after 1992.
Time frame: September 1990

Expected Results: Provide information on Automotive Industry 1992.

Activity: Report on how the German vehicle manufacturers' purchasing activities are organized

Expected Results: Facilitation of approach to FRG market by Cdn companies

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

Activity: Automechanica show in Frankfurt - September 1990
Expected Results: Promote Cdn Aftermarket Part Industry (20 companies total)

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MUNICH

Market: GERMANY WEST

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

- Activity: Organise an automotive trade seminar in Canada with speakers from Europe
Expected Results: Inform and educate Cdn auto ind. how to approach Europe 1992
- Activity: Organise outgoing sellers mission to Germany to major wholesalers and aftermarket parts buying associations.
Expected Results: Direct sales, agency agreements etc. Time frame: Oct/Sep 90
- Activity: Organise missions for Cdn companies with "market niche products". May - July 1990 or Nov. - Dec. 1990.
Expected Results: Introduction of 10 new companies to the market.
- Activity: Continue to lobby VW for further transfer of small parts manufacturing to Canada
Expected Results: Annual volume of VW Canada exports to FRG of 20-25 Mio \$

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MUNICH

Market: GERMANY WEST

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: AEROSPACE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	5800.00 \$M	6000.00 \$M	7000.00 \$M	7800.00 \$M
Canadian Exports	30.00 \$M	60.00 \$M	75.00 \$M	86.00 \$M
Canadian Share of Market	0.50 %	1.00 %	1.07 %	1.10 %

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

Major Competing Countries	Market Share
GERMANY WEST	50.00 %
FRANCE	23.00 %
UNITED STATES OF AMERICA	13.00 %
UNITED KINGDOM	8.00 %
ITALY	1.50 %
NETHERLANDS	1.50 %

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

Products/services for which there are good market prospects:

1. Airplanes
2. Engines
3. Systems and sub-systems
4. Components and Equipment

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Trade Fair activity
- Provincial export promotion
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MUNICH

Market: GERMANY WEST

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored
- Little/no gvt./comp part. in
- aircraft/space dev. projects

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

Activity: Mission of CDN Aerospace companies to ILA 90, Hannover
Expected Results: Introduction of 5 Cdn companies to the FRG market

Activity: Seminar and Mini-event involving CDN Aerospace suppliers,
Sept. 90

Expected Results: Introduction of 6 CDN companies to the FRG aerospace market

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MUNICH

Market: GERMANY WEST

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: LEISURE PROD. TOOLS HARDWARE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	2120.00 \$M	2250.00 \$M	2410.00 \$M	2600.00 \$M
Canadian Exports	4.10 \$M	5.20 \$M	6.10 \$M	6.90 \$M
Canadian Share of Market	0.19 %	0.23 %	0.26 %	0.27 %

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

Major Competing Countries

Market Share

GERMANY WEST	35.00 %
ITALY	24.00 %
TAIWAN	9.00 %
AUSTRIA	8.00 %
FRANCE	6.50 %
HONG KONG	4.50 %

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

Products/services for which there are good market prospects:

1. Winter sport equipment
2. Fitness equipment
3. Outdoor camping equipment
4. Golf equipment
5. Trecking equipment
6. Water sport equipment

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- PEMD support
- Fairs and Missions support
- Trade Fair activity
- Competitive pricing
- Strong sectoral capability in Canada
- skat./hockey eqpt strong

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MUNICH

Market: GERMANY WEST

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- poor follow up after trade fairs
- delivery problems

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

- Activity: Organize buyers mission to visit Cdn companies and CSGA show in Montreal
Expected Results: At least 50 buying connec., draw buyers attn. to Cdn prod.
- Activity: Lobby the Nurnberg Toy Fair Authorities to accept Canadian exhibitors from private industry.
Expected Results: Give at least 2 Cdn comp. opportunity to exhibit at the fair

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

- Activity: ISPO (Spring)
Expected Results: Intro. of 5 new comp. plus signing of new buying connections
- Activity: ISPO (Fall)
Expected Results: Introduction of 3 new companies to European market

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

- Activity: Organize a Canadian info booth at Fibo fair (Fitness Eqpt)
Time frame May 1990
Expected Results: Introduction of 4-5 comp. to market, new buy./agency conn.
- Activity: Participation at the "C.D.H. Einkaufstage" Show - April 1990
Expected Results: Identification of potential agents for wide range of Cdn co.
- Activity: Update 1990 of the Sporting Goods Report
Expected Results: Up to date info for Cdn industry on FRG market

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: MUNICH

Country: GERMANY WEST

The mission reports that the approximate flows to all countries of investment from its country/territory in Canadian \$ is as follows: (including portfolio flows if a primary focus)

	Total (\$ Million)	Canadian Share	Major Competitor Share
Two years ago	10.15	2.40	51.20
One year ago	11.40	1.70	44.50
Current year	11.00	2.50	43.00

The mission is of the opinion that Canada can reasonably expect to attract the following amount of foreign investment from its territory/country next year:

\$ 450 million

Canada's major competitors for investment from this territory/country are:

- United States of America
- United Kingdom
- Belgium/Luxemburg
- Italy
- Switzerland
- Netherlands

The following types of activities are currently being undertaken by Canada's major competitors to attract investment from this territory/country:

- National advertising campaigns - Seminars - National presentation at fairs - Direct mail campaigns, outcalls by national, provincial, municipal promoters - Visits of outgoing missions - Visits of incoming missions

IDP Partners and related program activities:

- German auditing firms
 - Seminars, referrals for prospecting

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: MUNICH

Country: GERMANY WEST

IDP Partners and related activities cont d:

Canadian provincial investment promoters
- Seminars, outcalls

Canadian municipal promoters
- Seminars, outcalls

German banks
- Outcalls, referrals for prospecting

German associations
- Outcalls, referrals for prospecting

German law firms
- Outcalls, referrals for prospecting

German Chamber of Commerce
- Seminars

Canadian airlines
- Writer's visits to Canada

German entrepreneurs
- Referrals for prospecting

German tax advisors
- Referrals for prospecting

Compared to major competitive destinations, Canada is perceived to have

the following advantages:

- F.T.A.
- Law and order perception
- European atmosphere perception
- Political stability
- Secure raw material base

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: MUNICH

Country: GERMANY WEST

the following constraints:

- Strong image of U.S.A.
- Preference for EEC countries
- Perception of Canada's cold climate
- Perception of Canada's small market size
- Absence of news on Canada

The mission indicates the following potential for various types of investment from within its territory/country:

Type of Investment	Potential
Portfolio	MEDIUM
Acquisition	HIGH
Greenfield	HIGH
Joint Venture	HIGH
Strategic Partnering	HIGH
Technology Licensing	MEDIUM

The mission believes that the following sectors are of greatest interest to investors in its territory/country an assigned ranking A = High B = Medium C = Low

Sector	Ranking
Agriculture/Food/Fish	C
Resource Processing	B
Machinery and Equipment	A
Transportation	A
Consumer Products	C
Commercial Service	C
Computer and Communications	A
Health Care Products/Medical	A
Aerospace and Defence	A
Strategic Technologies	B

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: MUNICH

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

Seq #	Date
Type: MISSION OUT, INDUSTRY	
2	06/90
Event Description: Opto electronics project sponsored by Investment Canada.	
City :Various	
Country :GERMANY WEST	
Investment Nature:J.V. Strategic Part Tech Licen ce (4,5)	
Investment Sector:STRATEGIC TECHNOLOGIES	
Event Cooperants : Individual German Companies	
Estimated Budget : \$5,000.00	
6	06/90
Event Description: Opto electronics project sponsored by Investment Canada	
City :Various	
Country :GERMANY WEST	
Investment Nature:J.V.Strat.Part. Tech.Licence (4,5)	
Investment Sector:STRATEGIC TECHNOLOGIES	
Event Cooperants : Individual German Companies	
Estimated Budget : \$5,000.00	
11	06/90
Event Description: Opto electronics project sponsored by Investment Canada	
City :Various	
Country :GERMANY WEST	
Investment Nature:J.V.Strat.Part. Tech.Licence (4,5)	
Investment Sector:STRATEGIC TECHNOLOGIES	
Event Cooperants : Individual German Companies	
Estimated Budget : \$5,000.00	

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: MUNICH

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

Seq #	Date
Type: SEMINAR, ABROAD	
1	04/90
Event Description: Automotive Sector	
City :Various	
Country :GERMANY WEST	
Investment Nature:Greenfield J.V. (3,4)	
Investment Sector:TRANSPORTATION	
Event Cooperants : Daimler-Benz/Volkswagen/BMW	
Estimated Budget : \$10,000.00	
5	05/90
Event Description: General Environmental Event.	
City :Munich	
Country :GERMANY WEST	
Investment Nature:Greenfield, J.V. . Strat.Part (3 ,4,5)	
Investment Sector:AREOSPACE/DEFENCE	
Event Cooperants : Chamber of Commerce	
Estimated Budget : \$3,000.00	
10	05/90
Event Description: General Environmental Event	
City :Munich	
Country :GERMANY WEST	
Investment Nature:Greenfield J.V. Strat.Part. (3,4,5)	
Investment Sector:STRATEGIC TECHNOLOGIES	
Event Cooperants : Chamber of Commerce	
Estimated Budget : \$3,000.00	

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: MUNICH

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

Seq #	Date
Type: SEMINAR, ABROAD	
9	04/90
Event Description: Automotive Sector	
City :Various	
Country :GERMANY WEST	
Investment Nature:Greenfield J.V. (3,4)	
Investment Sector:TRANSPORTATION	
Event Cooperants :	
Daimler Benz/Volkswagen/BMW	
Estimated Budget : \$10,000.00	
Type: OUTCALL PROGRAM	
4	09/90
Event Description: Small Size Agricultural Equipment for Eastern Provinces	
City :Various	
Country :GERMANY WEST	
Investment Nature:Greenfield, J.V. (3,4)	
Investment Sector:MACHINERY/EQUIPMENT	
Event Cooperants :	
Individual Companies	
Estimated Budget : \$6,000.00	
8	09/90
Event Description: Small Size Agricultural Equipment for Eastern Provinces	
City :Various	
Country :GERMANY WEST	
Investment Nature:Greenfield J.V. Strat.Part. (3,4)	
Investment Sector:AGRICULTURE/FOOD/FISH	
Event Cooperants :	
Individual Companies	
Estimated Budget : \$6,000.00	

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: MUNICH

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

Seq #	Date
Type: OUTCALL PROGRAM	
3	10/90
Event Description: Instrumentation and Sensing Equipment	
City : Various	
Country : GERMANY WEST	
Investment Nature: J.V. Strategic Part (4,5)	
Investment Sector: STRATEGIC TECHNOLOGIES	
Event Cooperants : Individual Companies	
Estimated Budget : \$12,000.00	
7	10/90
Event Description: Instrumentation and Sensing Equipment	
City : Various	
Country : GERMANY WEST	
Investment Nature: J.V. Strategic Part (4,5)	
Investment Sector: STRATEGIC TECHNOLOGIES	
Event Cooperants : Individual Companies	
Estimated Budget : \$120,000.00	
Total estimated budget for all proposals: \$185,000.00	

DEPARTMENT OF EXTERNAL AFFAIRS

PEMD - Proposed Government Promotional Activities 1990/91

Proposals As Of December 23/89

Post: Munich

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Contact</u>
90/05/08	Analytica, Munich Frg. Info Booth, With Group	Advanced Tech.Products & Services
90/05/10	FIBO '90-Sporting Goods Equip. Cologne, Frg. Info Booth, With Group	Consumer Products M.Samson

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: BRUSSELS

Country: BELGIUM

Confounding many forecasters, the Belgian economy turned in a near record performance in 1988 (GNP growth 3.6 %) and is well on the way to repeating this result in 89 (GNP growth 3.1 % est.). Rather than running out of steam after six years of expansion, capital investment, especially in the construction sector, kept the economy moving ahead. Inflation was 1.2 % and the continued growth brought unemployment down to 10 % of the labour force. Belgium also benefitted from the upturn in its most important trading partners (W. Germany, Netherlands, France) by increasing exports 9.5 %

Investment intentions for 1989 are still buoyant, up 25 % led by chemicals metal working and food sectors. Some pressure on inflation is expected to 3 % but although a significant increase, this is still below the EEC average. Only Public finances are out of step. The deficit was 7.8 % of GNP in 88 and will reduce to 7.3 % in 89 as result of a "package" that still increases charges rather than making fundamental cutbacks. The prospects for the Belgian economy are very satisfactory, nevertheless certain question marks, particularly international, could spoil this rosy picture. The nature of the economy, lack of natural resources and high dependence on foreign trade (70 % of GNP), make Belgium vulnerable to changes in the value of the US dollar or oil price increases.

Belgium's International Trade has benefitted from the upturn in the economic situation of its trade partners. With the need to increase production capacities, demand turned toward semi-finished products (iron and steel, chemicals, metallurgy) which represent 40 % of Belgium's exports. As a result, in 1988, Belgium increased exports of goods and services by 9.5 %. Imports were up nearly 9 % and the surplus in the current account improved (BF 110 billion). Foreign trade in 89 is slowing somewhat. Growth in both exports and imports will be closer to 6 % in 89 and forecast at 5 % in 90.

Belgium's sales to Canada (steel products, machinery, transport equipment, pharmaceuticals, diamonds) were less than Cdn \$ 600 million in 88, reflecting the alternative of nearby markets and less emphasis given to promoting Canadian trade. Belgium is in the top 10 of Canada's export destinations, providing a market worth nearly Cdn \$ 1.2 billion in 88, but the composition of our shipments remains mainly minerals, forest products and foodstuffs and does not reflect Canadian capabilities. The dynamic of our business relations has shifted to investment, technology cooperation and business collaboration as both Canadians and Belgians position themselves for the new economic environments expected in North America and Western Europe.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 EXPORT PROMOTION PRIORITIES

Mission: BRUSSELS

Country: BELGIUM

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

1. FOREST PRODUCTS, EQUIP, SERVICES
Belgium major lumber importing centre for Europe

2. EDUCATION, MEDICAL, HEALTH PROD
Specific sub-sectors identified as offering good prospects.
Will benefit from concentrated promotion.

3. ADVANCED TECH. PROD. & SERV
Fast growth / high import sector.
Excellent scope for Canadian High Technology products/services.

4. INDUSTRIAL MACHIN, PLANTS, SERV.
Strong sector for JV and cooperation Fabrimetal mission.

5. CONSUMER PRODUCTS & SERVICES
Sub-sector for sports clothing will be emphasised.

6. DEFENCE PROGRAMS, PRODUCTS, SERV
MOU in defence industrial cooperation has created new opportunities

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

- | | |
|-------------------------------------|----|
| 1. FOREST PRODUCTS, EQUIP, SERVICES | 4. |
| 2. MINE, METAL, MINERAL PROD & SRV | 5. |
| 3. | 6. |

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BRUSSELS

Market: BELGIUM

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: ARMAMENTS & VEHICLES

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	0.00 \$M	2.00 \$M	1.78 \$M	1.40 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.00 \$M	0.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	0.00 %

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

Major Competing Countries

Market Share

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

Products/services for which there are good market prospects:

1. Composants pour systemes electroniques d'armement
2. Projets et produits developpes/entente bilaterale
3. Appels d'offre publique (OTAN)

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- Bilateral economic trade agreement
- Willingness of exporters to invest/joint venture in territory

Factors for Canadian exports not reaching market potential:

- Vive concurrence des industries
- "europeennes" d'armements

06/12/89

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BRUSSELS

Market: BELGIUM

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

Activity: suivi mission belge de Mai 1989

Expected Results: Augmenter coop. ind. pour faciliter obtention contrats

Activity: Participation Hitech 1990

Expected Results: Informer ind. cdns sur caractéristiques du march belge

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BRUSSELS

Market: BELGIUM

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: COMPUTERS HARD/SOFTWARE & COMP

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1.60 \$M	1.90 \$M	2.00 \$M	2.30 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.00 \$M	0.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	0.00 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	0.00 %
NETHERLANDS	0.00 %
GERMANY WEST	0.00 %
UNITED KINGDOM	0.00 %
JAPAN	0.00 %
FRANCE	0.00 %

Products/services for which there are good market prospects:

1. Software / Bureautics
2. Software / Industrial
3. Hardware

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- _____
- _____

06/12/89

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BRUSSELS

Market: BELGIUM

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

Activity: FLANDERS TECHNOLOGY INTERNATIONAL 1991
Expected Results: Transfer of technology

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

Activity: Continue promotion by attending seminars, trade shows, etc.
Expected Results: Greater publicity for Canadian products

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BRUSSELS

Market: BELGIUM

Sector : FOREST PRODUCTS, EQUIP, SERVICES

Sub-Sector: WOOD AND WOOD PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	640.00 \$M	617.50 \$M	598.30 \$M	605.80 \$M
Canadian Exports	63.70 \$M	48.80 \$M	47.60 \$M	53.40 \$M
Canadian Share of Market	9.90 %	7.90 %	7.90 %	9.00 %

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

Major Competing Countries

Market Share

EUROPEAN COMMON MARKET C	0.00 %
SWEDEN	0.00 %
FINLAND	0.00 %
UNION OF SOVIET SOC REP	0.00 %

Current Status of Canadian

exports in this sector/subsector: Well established and growing

Products/services for which there are good market prospects:

1. Softwood lumber
2. Hardwood lumber
3. Plywood
4. Shingles and shakes
5. Hardwood veneers
6. other wood products

Factors contributing to current successful Canadian exports:

- Import duties are moderate
- Aggressive marketing
- Trade Fair activity
- Competitive pricing
- Strong sectoral capability in Canada

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Varies from product to product
- High prod. = concentrated efforts

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BRUSSELS

Market: BELGIUM

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

Activity: Review of potential for introducing further manufactured products in flooring and solid wood panelling
Expected Results: To determine possibility to change customer tastes

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

Activity: Continued promotion via video/technical literature of TFC construction and related building products
Expected Results: Increase market/consumer awareness

Activity: Continue promotion of less well known Canadian species (esp. hardwoods)
Expected Results: Increased awareness and demand for Canadian products

Activity: If funding available, pursue recommended demo housing project and related activities

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BRUSSELS

Market: BELGIUM

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: APPAREL (CLOTH, FUR, SHOES) TEXT

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1.80 \$M	1.70 \$M	1.70 \$M	1.90 \$M
Canadian Exports	250.00 \$M	250.00 \$M	230.00 \$M	400.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	0.00 %

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

Products/services for which there are good market prospects:

1. Winterwear
2. Children's wear
3. Active sportswear
4. Fur

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector

Factors for Canadian exports not reaching market potential:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BRUSSELS

Market: BELGIUM

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

- Activity: Continue market analysis in sub-sectors to define specific opportunities. Report and publicize finding to Cdn industry
- Expected Results: Better appreciation in Cda of market as basis for export eff
- Activity: Sending major buyers to Cda during trade shows and/or propos Cdn mfrers visit Brussels in groups of related clothing line
- Expected Results: Coordinated penetration of Belgian marke
- Activity: Canadian fashion campaign

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BRUSSELS

Market: BELGIUM

Sector : EDUCATION, MEDICAL, HEALTH PROD

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

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	75.00 \$M	90.00 \$M	87.00 \$M	87.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.00 \$M	0.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.30 %	0.30 %

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

Major Competing Countries	Market Share
GERMANY WEST	35.00 %
UNITED STATES OF AMERICA	20.00 %
FRANCE	15.00 %
UNITED KINGDOM	10.00 %
NETHERLANDS	7.00 %

Products/services for which there are good market prospects:

1. Produits de diagnostiques
2. Appareils medicaux
3. Chimie clinique
4. Immunochimie

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Limited Canadian capabilities
- Market prospects have not been adequately explored

- _____

- _____

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BRUSSELS

Market: BELGIUM

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

Activity: EXPOMED 90, Bruxelles -Mai 1990
Expected Results: Faire connaitre expertise canadienne dans ce secteur

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

Activity: Encourager les missions commerciales canadiennes a passer par la Belgique
Expected Results: Accroitre notre penetration du marche

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BRUSSELS

Market: BELGIUM

Sector : INDUSTRIAL MACHIN, PLANTS, SERV.

Sub-Sector: MANUFACT & MATERIAL PLANT, EQP.

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	0.00 \$M	140.00 \$M	85.00 \$M	60.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.00 \$M	0.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	0.00 %

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

Major Competing Countries

Market Share

FRANCE	0.00 %
GERMANY WEST	0.00 %
NETHERLANDS	0.00 %

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

Products/services for which there are good market prospects:

1. Traitement des eaux usees
2. Traitement des dechets domesti ues/industriels
3. Traitement des dechets nucleaires
4. Pollution de l'air

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector

Factors for Canadian exports not reaching market potential:

- Limited appreciation/understanding of distribution system
- Limited Canadian capabilities
- Market prospects have not been adequately explored
- Besoins enormes/budgets restreints

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BRUSSELS

Market: BELGIUM

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

Activity: Mission ECOTECH (Ontario) - Oct 198
Expected Results: Se familiariser avec ce secteur

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

Activity: IFEST 89 (Oct. 89)
Expected Results: Visiter ce salon afin de developper de nouveaux contacts

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: BRUSSELS

Country: BELGIUM

The mission reports that the approximate flows to all countries of investment from its country/territory in Canadian \$ is as follows: (including portfolio flows if a primary focus)

	Total (\$ Million)	Canadian Share	Major Competitor Share
Two years ago	5800.00	5.00	15.00
One year ago	6000.00	6.00	15.00
Current year	6000.00	5.00	15.00

The mission is of the opinion that Canada can reasonably expect to attract the following amount of foreign investment from its territory/country next year:

Cdn \$ 300 million (GLAVERBEL, CBR, PETROFINA, UCB
REAL ESTATE, PORTFOLIO)

Canada's major competitors for investment from this territory/country are:

- FRANCE
- NETHERLANDS
- W. GERMANY
- SPAIN

The following types of activities are currently being undertaken by Canada's major competitors to attract investment from this territory/country:

- Semi-permanent exhibitions (Nord-Pas-de-Calais)
- Participation trade fairs
- Trade/Investment mission
- Local investment counsellors
- Regional incentive programs

IDP Partners and related program activities:

- BANQUE BRUXELLES-LAMBERT
- SEMINAR

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: BRUSSELS

Country: BELGIUM

IDP Partners and related activities cont d:

KREDIETBANK
- SEMINAR

GENERALE DE BANQUE
- SEMINAR / NEWSLETTER

LOCAL CANADIAN LAWYERS
- ROUNDTABLE MEETINGS

CHAMBER OF COMMERCE
- LUNCHEONS / INTRODUCTIONS

FEDERATION DES ENTREPRISES BELGES
- INTRODUCTIONS

ONTARIO/QUEBEC OFFICES
- INVEST PROMOTIONS

Compared to major competitive destinations, Canada is perceived to have the following advantages:

- Access to N.A. market
- More "comfortable" business environment
- Easier for small/medium sized firms
- Less tax/social costs
- French language

the following constraints:

- Lack of familiarity
- Competition with Europe 92
- Business style
- Transfer personnel
- Distance

The mission indicates the following potential for various types of investment from within its territory/country:

Type of Investment	Potential
Portfolio	HIGH
Acquisition	MEDIUM
Greenfield	MEDIUM
Joint Venture	HIGH
Strategic Partnering	MEDIUM

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: BRUSSELS

Country: BELGIUM

The mission believes that the following sectors are of greatest interest to investors in its territory/country an assigned ranking A = High B = Medium C = Low

Sector	Ranking
Agriculture/Food/Fish	B
Resource Processing	A
Machinery and Equipment	A
Transportation	B
Consumer Products	C
Commercial Service	C
Computer and Communications	C
Health Care Products/Medical	B
Aerospace and Defence	C
Strategic Technologies	A

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: BRUSSELS

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

Seq #	Date
Type: MISSION IN, ACCESS	
2	04/90
Event Description: Association canvass aim JV's member - Also for sector 3 (Machinery...) - Cost is : Cdn \$ 10,000.- City : Quebec / Ontario Country : CANADA Investment Nature: Joint venture Partnering Technology Investment Sector: RESOURCE PROCESSING Event Cooperants : Provinces / Fabrimetal Estimated Budget : \$10,000.00	
Type: OTHER PROMOTION	
4	10/90
Event Description: Contact Canada - Also for sectors 3 (Machinery...) and 10 (Strategic Technologies) - Cost : Cdn \$ 3,000.- City : Ghent Country : BELGIUM Investment Nature: Acquisition Greenfield Joint venture Investment Sector: RESOURCE PROCESSING Event Cooperants : Brussels based Canadian companies Estimated Budget : \$3,000.00	
5	02/91
Event Description: Contact Canada - Also for sectors 3 (Machinery...) and 10 (Strategic Technologies) - Cost : Cdn \$ 3,000.- City : Mons Country : BELGIUM Investment Nature: Acquisition Greenfield Joint venture Investment Sector: RESOURCE PROCESSING Event Cooperants : Brussels based Canadian companies Estimated Budget : \$3,000.00	

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: BRUSSELS

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

Seq #

Date

Type: OTHER PROMOTION

3 Event Description:

05/90

Contact Canada - Also for sector 3 (Machinery...) and
10 (Strategic Technologies) - Cost is Cdn \$ 3,000.-

City :Antwerp

Country :BELGIUM

Investment Nature:Acquisition

Greenfield

Joint venture

Investment Sector:RESOURCE PROCESSING

Event Cooperants :

Brussels based Canadian companies

Estimated Budget : \$3,000.00

Total estimated budget for all proposals:

\$19,000.00

DEPARTMENT OF EXTERNAL AFFAIRS

PEMD - Proposed Government Promotional Activities 1990/91

Proposals As Of December 23/89

Post: Brussels

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Contact</u>
90/05/09	Expomed Brussels, Belgium Info Booth, Only	Education, Medical, Health Products
91/03/00	Batibouw '91 Brussels, Belgium Info Booth, With Group	Construction Industry

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: BRUSSELS, NAC

Country: BELGIUM

GENERAL: The Delegation TID programme continues to be specialized. Only two sectors, Defence Products and Communications and Electronics, are involved and given the multilateral NATO framework, TID staff concentrate, as previously reported, on trade promotion/market access, defence systems development projects and bid opportunities.

TRADE PROMOTION/MARKET ACCESS: Three major developments over the past year will have a dominant influence on TID trade promotion/market access in the coming year: The April 89 reductions in the DND budget; the single European Act of 1992 together with the European Commission's (EC) proposal for a defence products tariff regime; and NATO planning for conventional forces restructuring as a likely consequence of an arms reduction agreement. With the reduced DND funding profile, Canadian government resources to support industrial involvement in systems development projects will have to be very selectively applied. The EC tariff proposal could lead to a North American/European confrontation on defence trade. Every avenue will continue to be explored to produce a compromise solution. The prospect of restructured NATO conventional forces has the potential for significant industrial impact. TID staff will also follow closely and report on major defence industrial restructuring in Europe and important developments in the programmes and policies of the Independent European Programmes Group (IEPG).

SYSTEMS DEVELOPMENT PROJECTS: The centrepiece for NATO development projects will be the NATO Conventional Armaments Planning System (CAPS). TID staff will assist Departments and Canadian industry through our industrialists in the NATO Industrial Advisory Group (NIAG) in their assessments of opportunities in this long-term R&D initiative.

BID OPPORTUNITIES: Canadian firms are now experiencing increasing success in winning NATO contracts. Two prominent examples are Systemhouse entry into the AMS Consortium for the Air Command and Control (ACCS) programme and Lavelin success in a joint venture, following advice to the company at the 1988 Hi-Tech Conference, for construction of the new SHAPE Command Centre. TID staff will seek further Canadian participation in the two major ACCS Consortia and will seek to develop, with concerned Departments, a NATO ACCS Production Sharing Policy. We will also continue to monitor opportunities in the NATO Maintenance and Supply Agency (NAMSA) and have recently set up through TDP a visit to Canada by the NAMSA Competition Advocate. The NATO AEW Programme should yield major industrial benefits in the future mainly through the Electronic Support Measures (ESM) contract being implemented by UTL through UTL Canada. As in past years, company presentations to NATO expert groups and NATO agencies will be encouraged and arranged. Canadian firms' interests in Infrastructure projects will be protected in coordination with the Delegation Finance Section to ensure a fair application of NATO bidding rules.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 EXPORT PROMOTION PRIORITIES

Mission: BRUSSELS, NAC

Country: BELGIUM

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

1. DEFENCE PROGRAMS, PRODUCTS, SERV

Major NATO systems development projects have resulted in important R&D contracts to Canadian industry. As discussed in the Overview rapidly changing circumstances in budgets and force structures will need continuous analysis to select projects which will have a production payoff.

2. ADVANCED TECH. PROD. & SERV

The areas of systems development projects and bid opportunities include a wide variety of advanced, dual-use systems particularly in communications, electronics and software ideally suited to Canadian industrial capabilities.

3.

4.

5.

6.

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

1. DEFENCE PROGRAMS, PRODUCTS, SERV

2. ADVANCED TECH. PROD. & SERV

3.

4.

5.

6.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BRUSSELS, NAC

Market: BELGIUM

Sector : MULTIPLE SECTORS

Sub-Sector: ALL SUB-SECTORS

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

Products/services for which there are good market prospects:

1. Naval Systems
2. Software
3. Communications
4. Electronic Support Measures
5. Security Systems
6. Project integration

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Competitive pricing
- Strong sectoral capability in Canada
- Willingness of exporters to invest/joint venture in territory
- Company skill in identi-
- opps in major NATO projs.
- fying sub-contracting

Factors for Canadian exports not reaching market potential:

- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored
- Hot and cold interest by company
- marketing reps.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BRUSSELS, NAC

Market: BELGIUM

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

- Activity: Direct contact with newly established Brussels offices of -Northern Telecom and DMR.
- Expected Results: Increased direct contact between companies and NATO agencies

- Activity: Working with local Lavalin rep and SHL rep to ACCS program.
- Expected Results: Increased direct contact between companies and NATO agencies

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: COPENHAGEN

Country: DENMARK

Austerity continues to be the Danish Government's course including reductions in the public sector, continued high taxation (highest in the EC), tight control on wage increases, incentives to exports. These measures are aimed principally at reduction of the foreign debt, BOPs deficit preventing Danish production costs from rising faster than abroad and dampening domestic demand. In addition to Danish adjustment to Europe 1992, the principal economic problem remains foreign debt, which at 40% of GDP on a per capita basis is the highest among OECD countries.

The economy, however, is reviving, buoyed by a sustained improvement in Danish export performance. Productivity is improving and the BOPs has recovered slightly due to austerity. The latter has fallen from Dkr-36 bn in 1986 to Dkr-12 in 1988 with a projected level of Dkr-10.1 for 1989 - still approximately 2% of GDP. GDP which has not increased since 1986, is forecast to register a real growth of 1% in 1989 and 1.5% in 1990. Inflation has remained stable in the range of 4 to 5% for several years although the underlying causes have changed. While further budget cuts and tax reductions will be implemented for 1990 there has been serious disagreement among the political parties as to the composition. Any lessening of the tax burden will be intended for the stimulation of savings, not consumer spending.

From a Cdn perspective these economic developments might appear to limit our export opportunities. However, Dk represents an attractive market for Cdn exporters in view of its high per capita income, membership in the EC, being one of the Nordic countries, similarity of business practices (incl. widespread English language capability) and clear distribution channels. Although the market is demanding and the coming EC internal market process may increase competition to some extent, Cdn exports continue to be successful in both traditional & new product areas.

Last year our exports grew to CAD 131.3 mm from 110 in 1987 (Stats Cda figures) including fish, ag and food products, coal, chemical products high tech products, machinery and wood products. Danish exports to Canada totalled CAD 259.3 mm, up slightly from 1987 and are mainly foodstuffs, machinery, tools & parts, furniture, consumer goods and medical products. It should be noted that Cdn statistics undercount our exports to Denmark by nearly 20% due to the entrepot problem (i.e. many goods are shipped via other ports). Using Danish statistics our exports last year were CAD 150 mm. We see good potential for the Cdn Advanced Technology Sector including communication/informatics products, sophisticated office equipment, specialized machining/process control equipment, high design consumer goods, biomedical equipment, waste water treatment machinery/knowhow, and also specialty food products, new types of seafood and defence products.

As Denmark moves toward 1992 it will encounter serious challenges in its attempts to harmonize its tax structure etc. with other member states. At the same time, as we enter the European market era, there will also be growing opportunities for technology transfer, joint ventures and strategic partnering agreements between Cdn and Danish firms. Many small, niche-oriented and a number of large industries in Denmark have developed a sophisticated level of design and technical excellence offering the potential for Cdn industry to take advantage in such sectors as advanced technology, agriculture and food products, fisheries, light manufacturing.

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: COPENHAGEN

Country: DENMARK

With the addition last year of a Technology Development Officer, the Embassy now has the capacity to undertake a three-pronged approach when working with Danish industry - export, tech transfer and investment.

GREENLAND - After 10 years of Home Rule, Greenland is still heavily dependent financially upon Denmark (approx. 45% of Greenlands total revenue). Greenland is a heavy importer of goods/products of all descriptions (per capita imports approx CAD 11,000) with 80% coming from Denmark. 50% of exports also go to Denmark. Apart from exports of shrimp (64% of total), fish (15%), and metallic ores/concentrates, Greenland presently has no other substantive form of foreign exchange earnings. However, potential exists for exploration/exploitation of oil/mineral resources - Canadian firms would be welcome.

Notwithstanding the tradition of supply from Denmark and in some cases an inherent resistance to change, opportunities exist for a wide range of goods/products from Canada, including produce/food items, building supplies, boats and accessories, winter outerwear, etc. However, any realization of potential is predicated upon continuation and improvement of tran-

sportation services is predicated upon continuation and improvement of transportation services (presently four ships/year from St John, NB to Nuuk and First Air flights from Ikaluit). Canada Days held in Nuuk Sept 29 to Oct 1, 89 provided a focus on Canada, the potential for closer relations between Greenland and Canada and the need for these transportation links as the key to developing the trade potential. Canadian exports have grown from CAD 3.1 mm in 1985 to 4.2 mm (excl contractors eqpt to be returned to CDA) in 1988.

FAROE ISLANDS - With an industry almost totally dependent upon fisheries, the Faroes have been encountering substantial trade and BOPs deficits in recent years. As a result, austerity measures such as reduced public investment and downsizing of the fishing fleet and others are likely to be implemented. Its small, widely dispersed population and proximity to Denmark are limiting factors in exports from Canada. However, the Embassy will reassess the export potential in the light of current economic conditions in the Faroes and the Islands Market Studies of the Moncton Int'l Trade Centre.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 EXPORT PROMOTION PRIORITIES

Mission: COPENHAGEN

Country: DENMARK

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

1. ADVANCED TECH. PROD. & SERV

Denmark has the highest computer processing capacity per capita in Europe. English software is accepted and the market for all types of hardware/software is growing quickly. Cdn companies have had important successes here with potential for more. Environmental technologies are also a priority.

2. MULTIPLE SECTORS

GREENLAND - A small but potentially lucrative market of 57,000 offers potential for a variety of Canadian products. Canada Days in September 89 greatly increased Canadian profile and established momentum which we must follow up.

3. FISHERIES, SEA PRODUCTS & SERV.

Although a mature market this sector still offers opportunities for new product penetration as well as significant technology exchange. There is also an ongoing need for reporting and trade policy work in this sector.

4. DEFENCE PROGRAMS, PRODUCTS, SERV

Post is actively involved in both product promotion and policy issues (mainly offsets) with Danish Defence.

5. AGRI & FOOD PRODUCTS & SERVICE

This sector accounts for major portion of our responsive workload - both enquiries from Canada and Denmark. It also offers significant tech transfer opportunities.

6. MINE, METAL, MINERAL PROD & SRV

SUB-SECTOR MINERALS AND MINERAL PRODUCTS.

Denmark is an important market for Canadian thermal coal - we will maintain a watching brief. Greenland offers significant potential for Canadian expertise and investment in resources exploration/exploitation.

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

1. FISHERIES, SEA PRODUCTS & SERV.
2. MINE, METAL, MINERAL PROD & SRV
3. AGRI & FOOD PRODUCTS & SERVICE

4. CHEM PROD & PETROCHEM, EQP, SERV
5. FOREST PRODUCTS, EQUIP, SERVICES
6. ADVANCED TECH. PROD. & SERV

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: COPENHAGEN

Market: DENMARK

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	4180.00 \$M	6169.00 \$M	6000.00 \$M	6000.00 \$M
Canadian Exports	12.20 \$M	19.00 \$M	21.00 \$M	23.00 \$M
Canadian Share of Market	0.50 %	0.30 %	0.35 %	0.40 %

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

Major Competing Countries Market Share

GERMANY WEST	18.00 %
NETHERLANDS	10.00 %
FRANCE	6.00 %
UNITED STATES OF AMERICA	4.00 %

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

Products/services for which there are good market prospects:

1. Breeding stock / semen / embryos
2. Seeds for sewing
3. Turkey poults
4. Maple sugar (for tobacco production)
5. Honey
6. Special crops
7. Vegetable/Fruit frozen/canned
8. Corn IQF and cob
9. Fur skins
10. Additives/slaughterhouse waste
11. Tobacco

Factors contributing to current successful Canadian exports:

- Fairs and Missions support

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: COPENHAGEN

Market: DENMARK

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Lack of promotion and advertising
- EC - CAP
- Insuff interest on part of many exp
- -orders to service such a small mkt

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

Activity: Continued promotion of Cdn cattle breeding stock in Jutland - begin to include turkey poults
Expected Results: Increased Cdn profile and sales in Jutland

Activity: Continuing analysis of N American imports into Denmark to alert Cdns to new opportunities.
Expected Results: Increased Cdn market share/sales

Activity: Continue to assist the many Cdn companies interested in Danish agri/food processing technology
Expected Results: Market maintenance with some possibility of expansion

Activity: Respond to high volume of Cdn and Danish enquiries re export to Cda and two-way technology transfer.
Expected Results: Additional sales/new products

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

Activity: Preparation and participation in Ungskuet Fair, Herning, Jutland, June 90
Expected Results: Augment Cdn profile/image especially for Hereford

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: COPENHAGEN

Market: DENMARK

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

Activity: Investigate potential for supply of Cdn turkey poults
Expected Results: Introduce Cdn breeders to market

Activity: Establish award at Herning Fair for Hereford of Cdn
blood line
Expected Results: Enhance profile/image of Cdn Hereford

Activity: Investigate potential for biotechnology market and opportu-
nities for cooperation in R&D
Expected Results: Develop foothold in EC

Activity: Pursue entry facilitation and supply of Cdn hormone free
beef
Expected Results: Renewed exports for Cdn beef

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: COPENHAGEN

Market: DENMARK

Sector : FISHERIES, SEA PRODUCTS & SERV.

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	947.00 \$M	939.00 \$M	950.00 \$M	975.00 \$M
Canadian Exports	33.00 \$M	52.00 \$M	55.00 \$M	60.00 \$M
Canadian Share of Market	3.50 %	5.50 %	5.80 %	6.20 %

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

Major Competing Countries

Market Share

GREENLAND	35.00 %
NORWAY	16.00 %
FAROE ISLANDS	14.00 %
SWEDEN	5.00 %
ICELAND	4.00 %

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

Products/services for which there are good market prospects:

1. Shrimp
2. Salmon
3. Lumpfish roe
4. Lobster
5. Cod
6. Eel
7. Other speciality types

Factors contributing to current successful Canadian exports:

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: COPENHAGEN

Market: DENMARK

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Lack of promotion and advertising
- EC - CAP
- Cdn suppliers of new prods/species
- are not aware/have not pursued mkt.

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

- Activity: Supply updated market intelligence on Danish domestic fisheries and Danish intl. market (as competitor to Cda)
Expected Results: Incrsd awareness of wrld mkt conditns by Cdn authty/supplrs
- Activity: Responding to large number of requests for assistance fm Cdn suppliers and Danish importers
Expected Results: Maintain market share/increased sales

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

- Activity: Lobster promotion
Expected Results: Maintenance of market
- Activity: Promotion of new speciality species
Expected Results: Relieve unused plant capacity in Cda/increased exports
- Activity: Assist Cdn firms to upgrade production facilities with Danish equipment
Expected Results: Improve productivity/competitiveness
- Activity: Investigate joint ventures/Cdn investment possibilities in Faroe Island Fisheries
Expected Results: Increase supply of fish to Cdn industry

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: COPENHAGEN

Market: DENMARK

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	270.00 \$M	270.00 \$M	280.00 \$M	250.00 \$M
Canadian Exports	12.00 \$M	10.00 \$M	10.00 \$M	12.00 \$M
Canadian Share of Market	4.50 %	3.70 %	3.60 %	4.80 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	50.00 %
GERMANY WEST	15.00 %
FRANCE	10.00 %
UNITED KINGDOM	10.00 %

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

Products/services for which there are good market prospects:

1. Sonar
2. Sonar Imaging
3. Ammunition
4. Gas Masks
5. Radar Skills Training
6. Radar Enhancing Ammunition
7. Tank Transmission Replacement

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Limited appreciation/understanding of distribution system
- Cdn supplrs shld cntact Emb for guidance in dealing with DK military.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: COPENHAGEN

Market: DENMARK

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

Activity: Continue to work with DK govt/industry officials to minimise impact of offsets issues

Expected Results: Continued sales possibilities

Activity: Continue program of regular calls on key decision makers in defence and at political level when appropriate

Expected Results: To maintain/increase Cdn mkt share in period of austerity

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

Activity: Explore areas of potential supply to Danish Airforce

Expected Results: Make first inroads for Cdn suppliers

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: COPENHAGEN

Market: DENMARK

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	3100.00 \$M	2800.00 \$M	3000.00 \$M	3000.00 \$M
Canadian Exports	30.00 \$M	30.00 \$M	30.00 \$M	32.00 \$M
Canadian Share of Market	1.00 %	1.10 %	1.00 %	1.10 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	40.00 %
GERMANY WEST	20.00 %
JAPAN	18.00 %
UNITED KINGDOM	10.00 %
SWEDEN	5.00 %

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

Products/services for which there are good market prospects:

1. Telephone related products
2. Datacommunication
3. Software/Computer equipment
4. Electronic Instrumentation
5. Environment Equipment
6. Components
7. Process Control

Factors contributing to current successful Canadian exports:

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: COPENHAGEN

Market: DENMARK

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Unsuitable product
- Limited appreciation/understanding of distribution system
- Performance of local agent or representative
- Cos have ltd resources for tech/mkt
- g support for Euro distributors.

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

Activity: Ongoing assistance to Cdn electronic sector suppliers in consolidating business in rapidly evolving environment.
Expected Results: Maintain and increase sales volume

Activity: Follow up results of Nordic Initiatives Mission Oct89.
Expected Results: Maximise effect of mission & sales capabilities.

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

Activity: Outgoing Advanced Technology Mission, Fall 1990
Expected Results: Enhanced profile/awareness of Cdn capabilities

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

Activity: Monitor Telecoms deregulation and report to Cdn suppliers
Expected Results: New market opportunities

Activity: Sector report on computers/software
Expected Results: Increase awareness/preparedness of Cdn Supplrs to meet opps

Activity: Identify and visit additional companies in Jutland
Expected Results: Enhanced awareness of Cdn capabilities & opps for supply.

Activity: Analyse long-term computer/telecom market trends, R&D
Expected Results: Identify niches for Cdn suppliers in future.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: COPENHAGEN

Market: DENMARK

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

Deregulation of Danish Telcom
Market up to Fall 1990

Approximate Value:

0 M\$

Financing Source :

Contact

: David Horup, Cdn Emb, Copen, DK
tel 33122299, tlx 27036 dmcnc

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: COPENHAGEN

Market: DENMARK

Sector : MINE, METAL, MINERAL PROD & SRV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	582.00 \$M	428.00 \$M	450.00 \$M	450.00 \$M
Canadian Exports	15.00 \$M	12.20 \$M	35.00 \$M	30.00 \$M
Canadian Share of Market	2.70 %	2.60 %	7.60 %	6.60 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	34.40 %
COLOMBIA	20.40 %
POLAND	12.50 %
AUSTRALIA	11.40 %
UNION OF SOVIET SOC REP	7.30 %
UNITED KINGDOM	5.50 %

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

Products/services for which there are good market prospects:

1. Thermal Coal

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- DK spreads purchases over many
- mines & countries of supply

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: COPENHAGEN

Market: DENMARK

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

Activity: Continue to maintain good relationships and open door with 2 purchasing utilities

Expected Results: Maintain and increase market share

Activity: Encourage sourcing from new Cdn mines to expand available types of coal

Expected Results: Potential for 50% increase of imports from Cda

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: COPENHAGEN

Market: DENMARK

Sector : MULTIPLE SECTORS

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	600.00 \$M	570.00 \$M	550.00 \$M	550.00 \$M
Canadian Exports	3.10 \$M	4.20 \$M	6.00 \$M	7.00 \$M
Canadian Share of Market	0.50 %	0.70 %	1.10 %	1.30 %

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

Major Competing Countries

Market Share

DENMARK

80.00 %

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

Products/services for which there are good market prospects:

1. GREENLAND - produce/food items
2. Paper products including newsprint
3. Building supplies
4. Cement
5. Boats and accessories
6. Winter Outerwear

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Traditional supply fm DK - resis-
- tance to changes; Transportn factrs

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: COPENHAGEN

Market: DENMARK

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

Activity: Follow up to Cda Days in Nuuk Greenland Sep 89

Expected Results: Growing market share

Activity: Ongoing liaison with Royal Greenland Trading (KN)

Expected Results: Ensure enhanced frequency of ships & increased purchases from Cda

Activity: Regular communication with key Greenland importers

Expected Results: Increased Canadian market share

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

Activity: Visit to Cda of Greenland Premier Jonatham Motzfeldt,
April 90

Expected Results: New doors opened for Cda to Greenland

Activity: Self-financed Incoming Construction Mission from Greenland
April 90

Expected Results: Adoption of Canadian cold climate building methods

Activity: Inform/exchange Canadian mining companies to explore/exploit
it Greenland

Expected Results: Develop Greenland mineral resources with Canadian expertise/equipment

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: COPENHAGEN

Country: DENMARK

The mission reports that the approximate flows to all countries of investment from its country/territory in Canadian \$ is as follows: (including portfolio flows if a primary focus)

	Total (\$ Million)	Canadian Share	Major Competitor Share
Two years ago	1000.00	0.25	27.00
One year ago	950.00	1.50	30.00
Current year	915.00	0.85	30.00

Canada's major competitors for investment from this territory/country are:

- U.K.
- U.S.A.
- F.R.G.
- Spain

The following types of activities are currently being undertaken by Canada's major competitors to attract investment from this territory/country:

- U.K. has been most active holding British Investment Weeks in various regions with participation of U.K. based industrial development officers/experts. Has also conducted an active media campaign highlighting advantages of lower U.K. tax/labour costs placed in context of EC market integration.

IDP Partners and related program activities:

Province of Ontario

- Jointly sponsored Business Contact Canada Workshop(s) - ongoing cooperation with MITT/TRNTO

Province of Quebec

- Jointly sponsored Business Contact Canada Workshop(s) - ongoing cooperation with MICT/MONTL & Bureau de Que STKHM

Province of New Brunswick

- Jointly sponsored Business Contact Canada Workshop(s) - ongoing cooperation with Dept of Comm & Tech FRCTN

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: COPENHAGEN

Country: DENMARK

IDP Partners and related activities cont d:

Province of British Columbia

- Jointly sponsored Business Contact Canada Workshop(s) - ongoing cooperation with B.C. House LDN

Province of Alberta

- Jointly sponsored Business Contact Canada Workshop(s) - ongoing cooperation with Alberta House LDN

Province of Nova Scotia

- Jointly sponsored Business Contact Canada Workshop(s) - ongoing cooperation with Nova Scotia House LDN

Province of Saskatchewan

- Jointly sponsored Business Contact Canada Workshop(s) - ongoing cooperation with Govt of Sask Office in Zurich Switz

Compared to major competitive destinations, Canada is perceived to have the following advantages:

- Canadian attitudes/approaches/ethics are closer to Danish than Americans
- Canadian market is less overpowering than the American for newcomers/smaller Danish firms
- Access to U.S. market under F.T.A.
- Canadian lifestyle
- Canadian labour, product liability insurance, etc costs are lower than in the U.S.

the following constraints:

- For Quebec, language is perceived as a barrier
- Firms which established in FIRA era are still wary of "red tape"
- U.S. regarded as the real "North American Market"

The mission indicates the following potential for various types of investment from within its territory/country:

Type of Investment	Potential
Portfolio	HIGH
Acquisition	MEDIUM
Greenfield	MEDIUM
Joint Venture	HIGH
Strategic Partnering	MEDIUM
Technology Licensing	HIGH

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: COPENHAGEN

Country: DENMARK

The mission believes that the following sectors are of greatest interest to investors in its territory/country an assigned ranking A = High B = Medium C = Low

Sector	Ranking
Agriculture/Food/Fish	A
Resource Processing	C
Machinery and Equipment	B
Transportation	C
Consumer Products	A
Commercial Service	C
Computer and Communications	C
Health Care Products/Medical	B
Aerospace and Defence	C
Strategic Technologies	A

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: COPENHAGEN

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

Seq #	Date
Type: DIRECT MAIL CAMPAIGN	
4	03/91
Event Description: Ongoing program of providing industry specific news on Canada. Includes periodic newsletter.	
City :Copenhagen	
Country :DENMARK	
Investment Nature:Greenfield Strategic Partn Tech. Licensing	
Investment Sector:STRATEGIC TECHNOLOGIES	
Event Cooperants : None	
Estimated Budget : \$3,000.00	
Type: OUTCALL PROGRAM	
5	11/90
Event Description: Luncheon for senior business leaders hosted by HOM	
City :Copenhagen	
Country :DENMARK	
Investment Nature:Greenfield Strategic Parnt Tech. Licensing	
Investment Sector:AGRICULTURE/FOOD/FISH	
Event Cooperants : None	
Estimated Budget : \$700.00	
6	05/90
Event Description: Luncheon for senior business leaders hosted by HOM	
City :Copenhagen	
Country :DENMARK	
Investment Nature:Greenfield Strategic Partn Tech. Licensing	
Investment Sector:MACHINERY/EQUIPMENT	
Event Cooperants : None	
Estimated Budget : \$600.00	

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: COPENHAGEN

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

Seq #

Date

Type: OUTCALL PROGRAM

- | | | |
|-----------------------|--|-------|
| 7 | Event Description:
Follow up calls on leads identified by Business Contact
Canada
City :
Country : DENMARK
Investment Nature: Greenfield
Strategic Parnt
Tech. Licensing
Investment Sector: STRATEGIC TECHNOLOGIES
Event Cooperants :
None
Estimated Budget : \$2,000.00 | 03/91 |
| 3 | Event Description:
Luncheon for senior business leaders hosted by HOM
City : Copenhagen
Country : DENMARK
Investment Nature: Greenfield
Stragetic Partn
Tech. Licensing
Investment Sector: HEALTH CARE PRODUCTS/MEDICAL
Event Cooperants :
None
Estimated Budget : \$700.00 | 09/90 |
| Type: OTHER PROMOTION | | |
| 1 | Event Description:
Establish contact with Danish firms which have a vague inter
est in expanding into N Am - focus on Cda as location
City : Aarhus/Aalborg
Country : DENMARK
Investment Nature: Strategic Partn
Greenfield
Tech. Licensing
Investment Sector: STRATEGIC TECHNOLOGIES
Event Cooperants :
Business Contact Canada - Joint Workshop with
Provs of BC, Alta, Sask, Ont, Que, NB, NS & other orgs
Estimated Budget : \$4,000.00 | 06/90 |

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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: COPENHAGEN

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

Seq #

Date

Type: OTHER PROMOTION

2 Event Description:

11/90

Establish contact with Danish firms which have a vague interest in expanding into N Am - focus on Cda as location

City :Copenhagen

Country :DENMARK

Investment Nature:Greenfield

Strategic Partn

Tech. Licensing

Investment Sector:STRATEGIC TECHNOLOGIES

Event Cooperants :

Business Contact Canada - Joint Workshop with Provs of BC, Alta, Sask, Ont, Que, NB, NS & other orgs

Estimated Budget : \$4,000.00

Total estimated budget for all proposals:

\$15,000.00

DEPARTMENT OF EXTERNAL AFFAIRS

PEMD - Proposed Government Promotional Activities 1990/91

Proposals As Of December 23/89

Post: Copenhagen

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Contact</u>
90/06/27	Ungskuet, Herning, Denmark Info Booth, Only	Agri & Food Products & Services
90/10/00	Advanced Technology Mission To Nordics Mission Out, Industry	Advanced Tech.Products & Services

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: DUBLIN

Country: IRELAND

1988 was a good year for the Irish economy. The GNP increased by 1.7% to Pnd 18.7 billion, interest rates fell and the inflation rate reached only 2.5%. Industrial production rose by 9% and agricultural output 1.3%. The value of goods (pnds 12.1 billion) and services (pnds 1.4 billion) exported rose by 13% and exceeded imports by pnds 2.1% billion. The balance of payments registered a surplus of pnds 0.6 billion.

General revenue buoyancy, cuts in expenditures and a tax amnesty produced a remarkable improvement in the public finances. The current budget deficit was only of pnds 317 million and the exchequer borrowing requirement of pnds 619 million was at its lowest level in 30 years. The key short-term objective of Government policy, stabilizing the debt/GNP ratio, is being achieved. The unemployment rate, however, remained at 18.5% of the workforce. The national debt is very high at pnds 24.5 billion, or 131% of the GNP: the foreign debt element is at pnds 9.5 billion.

Despite its relatively small population of 3.5 million, Ireland is one of Canada's important economic partners. Canadian direct investments in Ireland total over \$1.5 billion and Irish direct investment in Canada \$0.25 billion. With 2 firms setting up subsidiaries here last year, Canadian companies now own wholly or jointly 40 firms in Ireland.

The trade turnover between the two countries reached an all-time high of \$431 million last year. Canadian sales totalled \$218 million and Canadian purchases \$213 million. Our main exports were aircraft, computers and parts, telephone equipment and parts, softwood lumber, tobacco, artificial fibres, newsprint, peas, salmon, steel rods and bars. Imports consisted of computers and parts, medicaments, vitamins, alumina, chemical compounds, medical/dental and orthopaedic equipment, liqueurs, chocolate products, artificial yarns/fibres and hair driers. In the past few months, Boeing DeHavilland of Canada Ltd sold 43 Dash 8 valued at over \$0.50 billion to GPA Jetprop Ltd of Shannon. Delivery will take place between 1989 and 1996 and the aircraft are mostly destined for third markets.

1989 should be another successful year for the economy. The growth rate could be 4% and fixed investment should rise by 10%. The balance of payments will again register a surplus. Inflation is expected to be higher than last year but below the average of the European Monetary System countries. Government efforts to reduce the budget deficit will continue.

The outlook in the medium term is for a sustained improvement in the Irish economic performance. Ireland is in the midst of the biggest investment boom of the present decade. The psychological climate has changed and the country is seen as having an improving economic future. Canada's export trade and investments here will continue to grow in coming years if our companies take a closer look at Ireland's potential.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 EXPORT PROMOTION PRIORITIES

Mission: DUBLIN

Country: IRELAND

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

1. TRANSPORT SYS,EQUIP,COMP,SERV.
Market potential promising for DASH 8 Aircraft.

2. ADVANCED TECH. PROD. & SERV
Ireland has a well developed Hi-Tech Industry. Canadian capabilities are readily recognised in areas such as telecommunications, electronics, computer (hardware & software) and broadcasting equipment.

3. DEFENCE PROGRAMS,PRODUCTS,SERV
Canadian firms show increasing interest in selling the Irish Armed Forces. Increasing opportunities; tendering through CCC.

4. AGRI & FOOD PRODUCTS & SERVICE
The level of (Irish and Canadian) interest in possible co-operation including licensing and joint ventures following SIAL and ANUGA.

5.

6.

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

- | | |
|-----------------------------------|------------------------|
| 1. TRANSPORT SYS,EQUIP,COMP,SERV. | 4. GRAINS AND OILSEEDS |
| 2. ADVANCED TECH. PROD. & SERV | 5. |
| 3. FOREST PRODUCTS,EQUIP,SERVICES | 6. |

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DUBLIN

Market: IRELAND

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: SEMI & PROCESSED FOOD & DRINK

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	600.00 \$M	650.00 \$M	700.00 \$M	750.00 \$M
Canadian Exports	0.00 \$M	1.00 \$M	1.50 \$M	2.00 \$M
Canadian Share of Market	0.10 %	0.20 %	0.20 %	0.30 %

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

Major Competing Countries

Market Share

IRELAND	50.00 %
FRANCE	10.00 %
NETHERLANDS	3.00 %
UNITED KINGDOM	20.00 %
ITALY	5.00 %
DENMARK	2.00 %

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

Products/services for which there are good market prospects:

1. Joint Ventures/Licensing
2. Peas/Beans
3. Corn
4. Honey
5. Cake mixes
6. Other Frozen Foods

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Fairs and Missions support

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DUBLIN

Market: IRELAND

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
 - Non-competitive financing
 -
-

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

Activity: Liaison with Food Research and Bio-Technology centres in Ireland and Canada.

Expected Results: Increased Co-operation.

Activity: Strengthen links with agents and (chain store) buyers.

Expected Results: New orders \$1 m.

Activity: Develop further sales of Canadian "Green" products.

Expected Results: New orders \$1 m.

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

Activity: Home in on food products not currently manufactured in Ireland.

Expected Results: Means of locating Cdn candidates open to technology transfer

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DUBLIN

Market: IRELAND

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	5.00 \$M	20.00 \$M	30.00 \$M	25.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.00 \$M	20.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	80.00 %

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

Major Competing Countries

Market Share

UNITED KINGDOM	85.00 %
AUSTRIA	10.00 %
ISRAEL	4.00 %
GERMANY WEST	1.00 %

Current Status of Canadian

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

Products/services for which there are good market prospects:

1. Aircraft
2. Radar
3. Ammunition
4. Bomb disposal equipment
5. Software
6. Body armour

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Requirements of Irish Def. Forces
- have recently incr. considerably.

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DUBLIN

Market: IRELAND

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

Activity: Follow up contacts with Irish Armed Forces.
Expected Results: Potential sales of \$20 million.

Activity: Follow up contacts with Irish Department of Defence contracts officer.

Expected Results: Potential sales of \$20 million

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DUBLIN

Market: IRELAND

Sector : ADVANCED TECH. PROD. & SERV.

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	2100.00 \$M	1900.00 \$M	2000.00 \$M	2100.00 \$M
Canadian Exports	70.00 \$M	75.00 \$M	80.00 \$M	85.00 \$M
Canadian Share of Market	3.00 %	4.00 %	4.00 %	4.00 %

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

Major Competing Countries

Market Share

UNITED KINGDOM	30.00 %
UNITED STATES OF AMERICA	16.00 %
GERMANY WEST	5.00 %
CANADA	18.00 %
JAPAN	5.00 %
NETHERLANDS	5.00 %

Current Status of Canadian

exports in this sector/subsector: Well established and growing

Products/services for which there are good market prospects:

1. Telecom Equipment/Parts
2. Computers/Parts
3. Remote Sensing Services
4. Software
5. Instrumentation

Factors contributing to current successful Canadian exports:

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DUBLIN

Market: IRELAND

Factors for Canadian exports not reaching market potential:

- _____
- _____

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

Activity: Analyze possibilities for greater levels of Technology Transfers prior to 1992.

Expected Results: Joint ventures and/or licensing

Activity: Maintain contacts with Canadian (Hi-Tech) Branch Plants in Ireland

Expected Results: Increased Canadian imports

Activity: Facilitate development of memorandum of understanding on Remote Sensing and Geographical Information.

Expected Results: M.O.U. leading to spin-off for Canadian suppliers etc...

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

Activity: Meetings with irish software distributors and developers.

Expected Results: New representational arrangements.

Activity: Incoming and outgoing missions.

Expected Results: Export sales of \$10 m.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DUBLIN

Market: IRELAND

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: AEROSPACE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	88.00 \$M	90.00 \$M	165.00 \$M	250.00 \$M
Canadian Exports	11.00 \$M	19.00 \$M	56.00 \$M	80.00 \$M
Canadian Share of Market	12.00 %	23.00 %	32.00 %	30.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	40.00 %
UNITED KINGDOM	10.00 %
FRANCE	5.00 %
NETHERLANDS	7.00 %

Current Status of Canadian

exports in this sector/subsector: Well established and growing

Products/services for which there are good market prospects:

1. Aircraft
2. Aircraft engines
3. Aircraft parts
4. Avionics equipment

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- _____
- _____

22/12/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DUBLIN

Market: IRELAND

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

Activity: Maintain contact with GPA Jetprop Ltd.
Expected Results: Further sales of DASH 8

Activity: Maintain contact with Irish Air Corps re Triton
Expected Results: Overcome competitors.

Activity: Maintain contact with AER Lingus and Ryanair
Expected Results: Overcome competitors.

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

Activity: Liaise with Irish and Canadian authorities re possible
M.O.U. for leased aircraft air-worthiness.
Expected Results: Memorandum of understanding

Activity: Monitor modernization programs at Irish Regional Airports -
in association with Pelorus.
Expected Results: Sale of Special Radar/Navigation Equipment

Activity: Maintain links with backers of Dublin Stolport.
Expected Results: Long-term possibilities.

DEPARTMENT OF EXTERNAL AFFAIRS

PEMD - Proposed Government Promotional Activities 1990/91

Proposals As Of December 23/89

Post: Dublin

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Contact</u>
90/04/00	CDN. Food Processors Mission To Ireland Mission Out, Industry	Agri & Food Products & Services

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: HELSINKI

Country: FINLAND

Finland enjoys an active market economy exporting 25% of its GDP. In 1988 Finland's exported goods and services had grown by 3.7% from 1987 and was valued at CAD 27 billion. Major trading partners were EEC accounting for 44%, EFTA 20% and USSR for 15%.

Main economic indicators

GDP went up by 3.2% in 1988 and estimates for 1989 show slower progress at 2%. Finland remains among the ten wealthiest countries in the Western world with a per capita GDP of CAD 22,000. In 1988 growth was sustained by strong domestic demand stimulated by wage increases, tax concession, good export performance. This was achieved despite slowdowns of sales to the Soviet Union from 20% in 1986 to 15% in 1988. Global exports have been successfully compensated by progress on the Western European market to West Germany, Sweden, France, UK and Italy. This success shows the pragmatism and efficiency of Finnish exporters in securing good positions on these markets before the changes to be brought by uniformization of the EEC are in force. In 1989 the growth has led to a state overheating and the spending has surpassed saving and increased foreign debt. In 1988 the inflation rate was 6.5% and only second to Great Britain. The 1987 CAD 550 million trade surplus disappeared in 1988 and the build up of an estimated CAD 1 billion trade deficit for 1989 is evident. In addition to strong growth of imports, invisible factors such as increased borrowing and Finnish travel abroad are maintaining pressure on the current account deficit already at CAD 2.5 billion in 1988 with a forecast of CAD 4 billion for 1989. Industrial restructuring continues with takeovers of smaller firms by large conglomerates, high levels of investment abroad and low unemployment (currently 3.5%). There is also an increased emphasis on high technology, research and development and co-operation with other countries. Canada is a favoured target for Finnish investors, most of the top 20 industrial companies have operations in Canada, and a market desire for technological co-operation has become evident.

Trade with Canada

The prospects for increasing trade between Canada and Finland are excellent. Statistics Canada reports that exports to Finland increased from CAD 95.8 million in 1987 to CAD 170 million in 1988. According to Finnish statistics the figure was CAD 176 million which includes CAD 12.5 million zinc sales but not a CAD 48 million Canadian owned aircraft. Canadian exports rose considerably in 1989, Finnish statistics indicate a 47% increase for the first 9 months of 1989. This reflects opportunities flagged in our program: informatics, electronics, leisure products and specialty sea foods are being noted by Canadian exporters. Strong domestic demand for these products is expected to go on in 1990 and it is up to Canadian exporters to take advantage of it.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 EXPORT PROMOTION PRIORITIES

Mission: HELSINKI

Country: FINLAND

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

1. **ADVANCED TECH. PROD. & SERV**
Rapidly expanding market in Finland. High expertise and substantial interest on part of Canadian suppliers
2. **FISHERIES, SEA PRODUCTS & SERV.**
High per capita consumption of fish. Canada ranks fifth largest source of fish for Finland. Expanding demand for specialty sea products and fish, especially whitefish.
3. **CONSUMER PRODUCTS & SERVICES**
Frequent enquiries from Canadian exporters market. Sporting goods and hockey equipment stable. Canadian label well received.
4. **DEFENCE PROGRAMS, PRODUCTS, SERV**
Good sales prospects for major and small projects. Opportunities could be generated by airforce fighter procurement plan scheduled for 1992.
- 5.
- 6.

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

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: HELSINKI

Market: FINLAND

Sector : FISHERIES, SEA PRODUCTS & SERV.

Sub-Sector: PROCESSED FISH & SHELLFISH

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	180.00 \$M	190.00 \$M	200.00 \$M	220.00 \$M
Canadian Exports	4.10 \$M	4.50 \$M	4.60 \$M	5.20 \$M
Canadian Share of Market	2.30 %	2.30 %	2.30 %	2.30 %

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

Major Competing Countries	Market Share
FINLAND	55.00 %
NORWAY	15.00 %
THAILAND	7.00 %
SWEDEN	6.00 %
ICELAND	2.00 %

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

Products/services for which there are good market prospects:

1. Whitefish
2. Shrimps
3. Lobster

Factors contributing to current successful Canadian exports:

- Import duties are moderate
- Aggressive marketing
- Fairs and Missions support
- Trade Fair activity
- Canada is one of few sources of supply
- Currency value
- CAD
- fluctuations in favour of

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: HELSINKI

Market: FINLAND

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Restrictive quotas
- Restrictive standards
- _____
- _____

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

- Activity: The fish market in Finland update
Expected Results: Make market requirements better known to Canadian exporters
- Activity: Ongoing distributor relations development aiming to present products according to accustomed tastes and new innovations.
Expected Results: To diversify selection of Canadian seafood

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

- Activity: Speciality Canadian seafood info day to be organized with local importers
Expected Results: Raise interest of distributors & catering trade in Finland

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: HELSINKI

Market: FINLAND

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	120.00 \$M	125.00 \$M	130.00 \$M	173.00 \$M
Canadian Exports	1.50 \$M	1.50 \$M	1.00 \$M	2.50 \$M
Canadian Share of Market	1.00 %	1.20 %	1.00 %	1.80 %

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

Major Competing Countries	Market Share
UNION OF SOVIET SOC REP	30.00 %
UNITED KINGDOM	20.00 %
FRANCE	20.00 %
SWEDEN	15.00 %
UNITED STATES OF AMERICA	15.00 %

Products/services for which there are good market prospects:

1. Electrical and Electronics
2. Consulting/Training
3. Security Products

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Competitive pricing
- Strong sectoral capability in Canada
- Local agent required

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Agents are not visited often enough
- or else agents are in 3rd country

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: HELSINKI

Market: FINLAND

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

- Activity: Increase number of contacts in Finnish M.O.D.
Expected Results: Better knowledge of MOD requirements, follow staff turnover
- Activity: Continuous communications with Finnish defence industry
Expected Results: Identify projects for industrial co-operation.
- Activity: Promotion of Canadian capabilities in training/simulation.
Expected Results: Canadians to bid on at least one project.

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

- Activity: Sector Review for Hitec 90
Expected Results: Diffusion of information on Finnish market to Cdn companies.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: HELSINKI

Market: FINLAND

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: COMPUTERS HARD/SOFTWARE & COMP

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	834.00 \$M	1015.00 \$M	1250.00 \$M	1350.00 \$M
Canadian Exports	4.70 \$M	5.30 \$M	7.00 \$M	8.00 \$M
Canadian Share of Market	0.50 %	0.50 %	0.60 %	0.60 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	33.00 %
JAPAN	15.00 %
ENGLAND	12.00 %
GERMANY WEST	10.00 %

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

Products/services for which there are good market prospects:

1. Computer peripherals
2. Computer hardware systems
3. Computer software

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Trade Fair activity

Factors for Canadian exports not reaching market potential:

- Market prospects have not been adequately explored
- _____
- _____

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: HELSINKI

Market: FINLAND

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

Activity: Transfer to win and update and expand post's electronic database on agents/distributors of informatics

Expected Results: Improved access to computer business market information

Activity: Continue distributing new publications on Cdn informatics

Expected Results: Increased awareness and reputation of Cdn expertise

Activity: Complete report on Finnish computer market

Expected Results: Help Canadian firms to understand market better

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

Activity: Computer mission to Finland

Expected Results: New distribution agreements/increased sales with local firms

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: HELSINKI

Market: FINLAND

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: OTHER ELECTRONICS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	350.00 \$M	340.00 \$M	360.00 \$M	390.00 \$M
Canadian Exports	2.00 \$M	1.20 \$M	2.00 \$M	2.50 \$M
Canadian Share of Market	0.60 %	0.40 %	0.60 %	0.60 %

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

Major Competing Countries Market Share

GERMANY WEST	29.00 %
UNITED STATES OF AMERICA	17.00 %
ENGLAND	10.00 %
SWEDEN	9.00 %
JAPAN	7.00 %
SWITZERLAND	6.00 %

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

Products/services for which there are good market prospects:

1. electronic products and components

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Trade Fair activity

Factors for Canadian exports not reaching market potential:

- Market prospects have not been adequately explored
- _____
- _____

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: HELSINKI

Market: FINLAND

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

- Activity: Update and expand electronic database on local firms in sector.
Expected Results: Finding best possible contacts for Canadian firms.
- Activity: Continue regular attendance in Finnish and European trade fairs.
Expected Results: Establish&maintain contacts with local firms&Cdn suppliers
- Activity: Distribute promotional material available on sector.
Expected Results: Increase knowledge of Cdn electronics ind. & increase sales

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: HELSINKI

Market: FINLAND

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: LEISURE PROD. TOOLS HARDWARE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	44.00 \$M	52.50 \$M	55.00 \$M	57.00 \$M
Canadian Exports	1.70 \$M	2.20 \$M	2.40 \$M	2.50 \$M
Canadian Share of Market	3.80 %	4.10 %	4.30 %	4.40 %

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

Major Competing Countries Market Share

AUSTRIA	16.00 %
TAIWAN	16.00 %
FRANCE	10.00 %
GERMANY WEST	10.00 %
UNITED STATES OF AMERICA	10.00 %
ITALY	6.00 %

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

Products/services for which there are good market prospects:

1. Sporting goods

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Fairs and Missions support
- Currency value
- CAD
- fluctuation in favour of

Factors for Canadian exports not reaching market potential:

- _____
- _____

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: HELSINKI

Market: FINLAND

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

Activity: Instore promotion of Canadian sporting goods in collaboration with importers.

Expected Results: Increase awareness of Canadian origin of products.

Activity: Incite Canadian manufacturers to visit territory and participate in promotion of their products.

Expected Results: Motivate agents, stimulate demand and increase market share.

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

Activity: Explore availability of new products from Canada and their potential on the Finnish market.

Expected Results: Diversification of Canadian product line.

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: HELSINKI

Country: FINLAND

The mission reports that the approximate flows to all countries of investment from its country/territory in Canadian \$ is as follows: (including portfolio flows if a primary focus)

	Total (\$ Million)	Canadian Share	Major Competitor Share
Two years ago	1000.00	2.10	56.50
One year ago	1038.00	6.90	35.50
Current year	2179.00	1.70	68.00

The mission is of the opinion that Canada can reasonably expect to attract the following amount of foreign investment from its territory/country next year:

CAD 50 million

Canada's major competitors for investment from this territory/country are:

- Sweden
- Federal Republic of Germany
- U.S.A.
- United Kingdom

The following types of activities are currently being undertaken by Canada's major competitors to attract investment from this territory/country:

- Business Development Seminar

IDP Partners and related program activities:

Finnish Export Institute

- Exporters training institute. Assistance with seminars on Canada's investment environment

KOP Bank, Union Bank of Finland and Postipankki

- Co-sponsors for seminars

Confederation of Finnish Industries

- Support for promotion of events

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: HELSINKI

Country: FINLAND

IDP Partners and related activities cont d:

Finnish-Canadian Trade Association
- Support for promotion of events

Provincial Governments Alberta, Quebec, Ontario, BC, and others
- Support for promotion of events

Finnish Foreign Trade Association
- Support for promotion of events

Chambers of Commerce in Tampere, Lahti and Hmeenlinna
- Support for promotion of events

Woods Gordon
- Speaker support

Tory, Tory, Deslauriers and Binnington, UK
- Speaker Support

Strategic Analysis International
- Speaker Support

Compared to major competitive destinations, Canada is perceived to have the following advantages:

- Free Trade Agreement with the USA
- Positive image. Affinities.

the following constraints:

- Canada (North-America) is third after EFTA and EEC.
- Lack of takeover target

The mission indicates the following potential for various types of investment from within its territory/country:

Type of Investment	Potential
Portfolio	MEDIUM
Acquisition	HIGH
Greenfield	MEDIUM
Joint Venture	MEDIUM
Strategic Partnering	HIGH
Technology Licensing	MEDIUM

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: HELSINKI

Country: FINLAND

The mission believes that the following sectors are of greatest interest to investors in its territory/country an assigned ranking A = High B = Medium C = Low

Sector	Ranking
Agriculture/Food/Fish	C
Resource Processing	A
Machinery and Equipment	A
Transportation	C
Consumer Products	B
Commercial Service	C
Computer and Communications	B
Health Care Products/Medical	A
Aerospace and Defence	C
Strategic Technologies	A

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: HELSINKI

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

Seq #		Date
	Type: ENTREPRENURIAL SEMINAR	
2	Event Description: Investment and Business Development Seminar City :Mikkeli Country :FINLAND Investment Nature: Investment Sector:STRATEGIC TECHNOLOGIES Event Cooperants : Local Chamber of Commerce Estimated Budget : \$2,000.00	02/91
10	Event Description: Investment and Business Development Seminar City :Tampere Country :FINLAND Investment Nature: Investment Sector:STRATEGIC TECHNOLOGIES Event Cooperants : Local Chamber of Commerce Estimated Budget : \$2,000.00	06/90
13	Event Description: Investment and Business Development Seminar City :Mikkeli Country :FINLAND Investment Nature:Greenfield Joint venture Strategic partn Investment Sector:STRATEGIC TECHNOLOGIES Event Cooperants : Local Chamber of Commerce Estimated Budget : \$2,000.00	02/91
11	Event Description: Investment and Business Development Seminar City :Vaasa Country :FINLAND Investment Nature: Investment Sector:STRATEGIC TECHNOLOGIES Event Cooperants : Local Chamber of Commerce Estimated Budget : \$2,000.00	09/90

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: HELSINKI

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

Seq #		Date
	Type: COUNSELLOR TOUR	
5	Event Description: Ambassador Corporate Liaison program City :Tampere Country :FINLAND Investment Nature: Investment Sector:STRATEGIC TECHNOLOGIES Event Cooperants : Finnish corporations Estimated Budget : \$500.00	01/91
3	Event Description: Ambassador Corporate Liaison program City :Helsinki Country :FINLAND Investment Nature: Investment Sector:STRATEGIC TECHNOLOGIES Event Cooperants : Finnish corporations Estimated Budget : \$500.00	01/91
4	Event Description: Ambassador Corporate Liaison program City :Lahti Country :FINLAND Investment Nature: Investment Sector:STRATEGIC TECHNOLOGIES Event Cooperants : Finnish corporations Estimated Budget : \$500.00	01/91
	Type: DIRECT MAIL CAMPAIGN	
6	Event Description: Free Trade Agreement Analysis distribution City : Country :FINLAND Investment Nature: Investment Sector:STRATEGIC TECHNOLOGIES Event Cooperants : Estimated Budget : \$1,000.00	12/90

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: HELSINKI

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

Seq #	Date
Type: LOCAL PUBLICATION	
8	09/90
Event Description:	
One page advertising feature in Finnish Export Institute News Bulletin and mailing to all exporters	
City :	
Country : FINLAND	
Investment Nature:	
Investment Sector: STRATEGIC TECHNOLOGIES	
Event Cooperants :	
Finnish Export Institute	
Estimated Budget : \$2,000.00	
Type: OTHER PROMOTION	
9	04/90
Event Description:	
F.T.A. One Year Later Seminar	
City : Helsinki	
Country : FINLAND	
Investment Nature:	
Investment Sector: STRATEGIC TECHNOLOGIES	
Event Cooperants :	
Finnish Foreign Trade Assoc, Finnish Export Institute, U.S. Embassy, Woods Gordon	
Estimated Budget : \$3,000.00	

Total estimated budget for all proposals: \$15,500.00

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: LISBON

Country: PORTUGAL

Recent reliable estimates show that, at the end of 1989, the country's GDP will have grown by 3.8% i.e. 0.4 point below the 1988 level and 0.2 point below the government's target set in November 1988. Economic performance to April 89 was characterized by a slower rate of growth, a decrease in domestic demand pressures, and a worsening in inflation rates and in balances on current account. Forecasts for 1989 show a 5.4% increase in domestic demand (vs 8.3% in 1988); 3.5% in private consumption (6.5%); 2 in public sector consumption (4.5%); and 11% in gross fixed capital formation (16%). The import bill will grow by 9.5% (17.3%) but improvements in the balance of trade may be marginal as exports also grow more slowly.

The political and economic climates favours investment. It is however apparent that the government's actions to reduce balance-of-trade deficits, and avoid them in current account, will negatively affect investment growth. Increasing signs of instability in opposition parties and in the labour sector may accelerate the deterioration. Growth in industrial production has already weakened from about 6% in 1988 to a projected 3.3% in 1989. The resource industries sector is growing at a rapid pace but not enough to counter the decline of the manufacturing sector (5.5% in 1988; 1.7% in the first quarter of 1989) led by clothing (-27.9%). A positive push is however expected from the Regional Development Plan, e.g., in respect of the construction of propane gas transportation and distribution networks (about CAD 700 million). Unemployment continues to decrease - in the first quarter of 1989, about 42,500 individuals entered the labour market while the number of jobs grew by 47,500.

The worst problem continues to be inflation. Until mid-1988, the rate of growth in the CPI had been declining rather rapidly. The trend then reversed itself and, by the end of July 1989, the CPI was 13.3% above the July 1988 level, and growing at an average of 12.1% per annum. It is expected to show 12.3% for the year as a whole, or twice the rate initially forecast by the government and about 50% above its subsequently revised estimate of 8.5%.

Capital markets are showing increasing vitality which could at least in part reflect the interest shown by foreign investors and the strong presence of local institutional investors. Privatizations played no doubt a significant role as well but it is still too early to fully evaluate its current, let alone future, nature and scope. Amendments to the constitutions, which opened the way to 100% privatizations, were enacted by law only on 08 July 1989. The Lisbon Stock Exchange (LSE) responded to the demand by adding one day (Monday) to its work week. Within two months, the daily volume of operations grew from about 500 million escudos (CAD 4 million) to the 2 billion range (CAD 15 million). Several times, late in August 1989, the LSE had to extend its workday beyond 1400 hours to allow for the conclusion of numerous unfinished transactions.

The country's economic performance has been the subject of recent positive reviews, including by the World Bank and the IMF. The Fund's inclusion of Portugal in the list of industrialized countries was widely written about in the local press although it raised some major issues.

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: LISBON

Country: PORTUGAL

Among these, the Fund's call for a "firm anti-inflationary policy" would pose significant problems if reduced levels of private demand were to be attained via slower growth rates of the salaries component. In a country where salary levels are already significantly lower than in other EC member states, labour would strongly resist any such policies.

Against this background good economic performance in 1990 will largely depend on the government's ability to control demand and investment growth without increasing the potential for political and/or labour instability. These often contrary forces will be at or near center stage as the country prepares for parliamentary and presidential elections in 1991. They will thus likely lead the government to intervene and ensure that the negative effects are minimized (e.g. by limiting the buyer's ability/capacity to import goods and services) while the positive aspects are suitably publicized (e.g. foreign investment which brings in new technologies, energy savings, significant new employment and/or new export capabilities).

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 EXPORT PROMOTION PRIORITIES

Mission: LISBON

Country: PORTUGAL

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

1. FISHERIES, SEA PRODUCTS & SERV.

Cereals market will be free from govt. direct intervention. Canadian exporters will have to face strong competition, aimed at individual millers, for increased market shares. The opening of canola market to human consumption uses may create new opportunities.

2. GRAINS AND OILSEEDS

Portuguese market for imported cod will remain significant but access to it will increasingly depend on comprehensive marketing strategies. The "fisheries issues" will require continuing evaluation and reporting of actual/potential effects on Canadian export interests.

3. AGRI & FOOD PRODUCTS & SERVICE

Interest in Canadian seed potatoes will remain high as, for 1990, the need to seek derogation from EC regulations has been eliminated. Semen and animal feed sales will continue to expand. Embryo transfer market is now poised for takeoff. Interest in dairy cattle will remain high, but efforts will be required to ensure suitable supplies of animals.

4. ADVANCED TECH. PROD. & SERV

The informatization of government and business operations will continue at a rapid pace. Modernization of telecommunications and privatization of radio and TV sectors will continue to demand state-of-the-art products and services

5.

6.

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

1. FISHERIES, SEA PRODUCTS & SERV.
2. GRAINS AND OILSEEDS
3. MINE, METAL, MINERAL PROD & SRV

4. AGRI & FOOD PRODUCTS & SERVICE
5. ADVANCED TECH. PROD. & SERV
- 6.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LISBON

Market: PORTUGAL

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: ANIMAL, POULTRY BREEDING STOCK

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	0.66 \$M	1.00 \$M	1.00 \$M	1.00 \$M
Canadian Exports	0.10 \$M	0.39 \$M	0.40 \$M	0.45 \$M
Canadian Share of Market	16.00 %	39.00 %	40.00 %	45.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	45.00 %
GERMANY WEST	8.00 %
UNITED KINGDOM	3.00 %
FRANCE	2.00 %

Current Status of Canadian

exports in this sector/subsector: Well established and growing

Products/services for which there are good market prospects:

1. Semen
2. Embryo Transfer Products

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- _____
- _____

01/12/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LISBON

Market: PORTUGAL

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

Activity: Ongoing support for local agents.

Expected Results: Continued export value growth.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LISBON

Market: PORTUGAL

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: SEEDS & SPECIAL CROPS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	34.00 \$M	34.00 \$M	37.00 \$M	40.00 \$M
Canadian Exports	2.50 \$M	2.40 \$M	4.00 \$M	4.00 \$M
Canadian Share of Market	7.00 %	7.00 %	11.00 %	11.00 %

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

Major Competing Countries

Market Share

NETHERLANDS	45.00 %
UNITED KINGDOM	32.00 %
DENMARK	8.00 %

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

Products/services for which there are good market prospects:

1. Seed Potatoes

Factors contributing to current successful Canadian exports:

- Import duties are moderate
- Aggressive marketing
- Competitive pricing

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- EEC derogation requirement.
- EEC non-tariff protectionist measures.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LISBON

Market: PORTUGAL

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

Activity: Marketing calls on buyers.
Expected Results: Maintain interest in Canadian products

Activity: Regular meetings with local authorities.
Expected Results: Ensure prompt action re derogation.

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

Activity: Maintain close contact with Portuguese phytosanitary reps.
Expected Results: Facilitate a better market penetration.

Activity: Proposed incoming mission.
Expected Results: Maintain interest in Canadian product.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LISBON

Market: PORTUGAL

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: FEED, FERTILIZER & VET PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	253.00 \$M	384.00 \$M	390.00 \$M	400.00 \$M
Canadian Exports	0.00 \$M	3.80 \$M	4.00 \$M	5.00 \$M
Canadian Share of Market	0.00 %	1.00 %	1.00 %	1.20 %

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

Major Competing Countries Market Share

UNITED STATES OF AMERICA	37.00 %
THAILAND	28.00 %
BRAZIL	4.00 %
INDONESIA	4.00 %

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

Products/services for which there are good market prospects:

1. Alfalfa (Pellets/Cubes)

Factors contributing to current successful Canadian exports:

- Provincial export promotion
- Strong sectoral capability in Canada

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- _____
- _____

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LISBON

Market: PORTUGAL

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

Activity: Continuing support for local agent.
Expected Results: Maintain exports growth rate.

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

Activity: Outgoing mission on alfalfa (cubes & pellets).
Expected Results: Secure and expand market share.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LISBON

Market: PORTUGAL

Sector : FISHERIES, SEA PRODUCTS & SERV.

Sub-Sector: FISH & SHELLFISH & OTHER PROD

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	432.00 \$M	421.00 \$M	438.00 \$M	450.00 \$M
Canadian Exports	76.00 \$M	67.00 \$M	42.00 \$M	50.00 \$M
Canadian Share of Market	17.60 %	15.00 %	9.00 %	11.00 %

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

Major Competing Countries Market Share

ICELAND	35.00 %
NORWAY	21.00 %
PORTUGAL	5.00 %
SPAIN	6.00 %
DENMARK	6.00 %
GREENLAND	3.00 %

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

Products/services for which there are good market prospects:

1. Cod
2. Squid (Illex Type)
3. Hake
4. Redfish
5. Other groundfish species

Factors contributing to current successful Canadian exports:

- Import duties are moderate
- Aggressive marketing
- Strong sectoral capability in Canada
- Preference for Canadian

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LISBON

Market: PORTUGAL

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Restrictive quotas
- 13% duty on wet salt cod when EEC
- tariff quota is exhausted.

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

Activity: Ongoing program of marketing calls on major importers.
Expected Results: Reports to exporters on opportunities.

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

Activity: Closer contact with local authorities.
Expected Results: Maintain/expand access to market.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LISBON

Market: PORTUGAL

Sector : GRAINS AND OILSEEDS

Sub-Sector: CEREAL GRAINS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	655.00 \$M	661.00 \$M	850.00 \$M	690.00 \$M
Canadian Exports	38.00 \$M	15.00 \$M	38.00 \$M	42.00 \$M
Canadian Share of Market	6.00 %	2.00 %	4.00 %	6.00 %

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

Major Competing Countries

Market Share

PORTUGAL	65.00 %
UNITED STATES OF AMERICA	11.00 %
SAUDI ARABIA	5.00 %
AUSTRALIA	2.00 %
TURKEY	0.70 %
MEXICO	0.30 %

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

Products/services for which there are good market prospects:

1. Wheat
2. Feed Barley
3. Corn

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Increased levies to
be imposed in 1991.
- Cdn. wheat is facing quality/price
competition from Saudi Arabia

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LISBON

Market: PORTUGAL

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

Activity: Ongoing marketing contacts with expanded potential customer base.
Expected Results: Timely advice to exporters on trends and opportunities.

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

Activity: Calls on millers and import agents.
Expected Results: Assess competition capabilities.

Activity: Outgoing mission from Canada to Portugal.
Expected Results: Increase market share.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LISBON

Market: PORTUGAL

Sector : GRAINS AND OILSEEDS

Sub-Sector: OILSEEDS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	467.00 \$M	500.00 \$M	455.00 \$M	438.00 \$M
Canadian Exports	6.00 \$M	14.00 \$M	6.00 \$M	8.00 \$M
Canadian Share of Market	1.30 %	2.00 %	1.00 %	1.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	34.00 %
FRANCE	32.00 %
BRAZIL	15.00 %
ARGENTINA	11.00 %
URUGUAY	2.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. Soyabeans
2. Canola
3. Sunflower

Factors contributing to current successful Canadian exports:

- Import duties are moderate
- Competitive pricing
- Strong sectoral capability in Canada

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Restrictive quotas
- EEC subsidy on the
- EEC crop.
- EEC non-tariff protectionist
- measures.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LISBON

Market: PORTUGAL

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

Activity: Ongoing calls on clients and potential importers.
Expected Results: Open new sales opportunities.

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

Activity: Outgoing canola technical mission (proposal to be prepared).
Expected Results: Make all advantages of product known to oil crushers.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LISBON

Market: PORTUGAL

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: BROADCASTING, INC. CABLE TV

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	15.00 \$M	29.00 \$M	28.00 \$M	27.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.00 \$M	1.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	3.70 %

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

Major Competing Countries

Market Share

JAPAN	23.00 %
GERMANY WEST	20.00 %
FRANCE	14.00 %
UNITED KINGDOM	8.00 %
ITALY	4.00 %
SWITZERLAND	4.00 %

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

Products/services for which there are good market prospects:

1. CATV
2. Studio equipment

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- _____
- _____

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LISBON

Market: PORTUGAL

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

Activity: Marketing calls on potential buyers.
Expected Results: Open sales opportunities.

Activity: Outgoing mission on CATV.
Expected Results: Increased local awareness of Cdn. capabilities.

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

New TV broadcasting services. Approximate Value: 24 M\$
Financing Source : DOM - Domestically funded
B.C. - Buyer Credits required
Contact : Post

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LISBON

Market: PORTUGAL

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: COMPUTERS HARD/SOFTWARE & COMP

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	322.00 \$M	329.00 \$M	335.00 \$M	340.00 \$M
Canadian Exports	1.60 \$M	4.00 \$M	5.00 \$M	7.00 \$M
Canadian Share of Market	0.50 %	1.20 %	1.50 %	2.00 %

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

Major Competing Countries Market Share

UNITED KINGDOM	21.00 %
UNITED STATES OF AMERICA	19.00 %
GERMANY WEST	19.00 %
FRANCE	14.00 %
NETHERLANDS	10.00 %
BELGIUM	10.00 %

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

Products/services for which there are good market prospects:

1. Software
2. Networks
3. Consulting

Factors contributing to current successful Canadian exports:

- Provincial export promotion
- Strong sectoral capability in Canada

Factors for Canadian exports not reaching market potential:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LISBON

Market: PORTUGAL

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

Activity: Continuing support for local agents.
Expected Results: Maintain/expand growth rate in market share.

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

Activity: Expand network of contacts with potential buyers.
Expected Results: Maintain/expand growth rate in market share.

Activity: Outgoing mission on informatics.
Expected Results: Increased awareness of market potential.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LISBON

Market: PORTUGAL

Sector : TRANSPORT SYS, EQUIP, COMP, SERV.

Sub-Sector: AEROSPACE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	26.00 \$M	29.00 \$M	30.00 \$M	250.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.00 \$M	30.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	12.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	35.00 %
UNITED KINGDOM	31.00 %
GERMANY WEST	10.00 %
FRANCE	8.00 %

Current Status of Canadian

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

Products/services for which there are good market prospects:

1. CL-215
2. Dash-8

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Reluctance of authorities to
- complete transaction (CL-215).

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LISBON

Market: PORTUGAL

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

Activity: Ongoing support for local agents.
Expected Results: Sales of DASH-8 and CL-215.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LISBON

Market: PORTUGAL

Sector : FOREST PRODUCTS, EQUIP, SERVICES

Sub-Sector: PULP AND PAPER PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	34.00 \$M	53.00 \$M	52.00 \$M	55.00 \$M
Canadian Exports	1.60 \$M	0.80 \$M	3.00 \$M	3.00 \$M
Canadian Share of Market	5.00 %	1.00 %	5.00 %	5.00 %

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

Major Competing Countries

Market Share

SWEDEN	35.00 %
FINLAND	15.00 %
NORWAY	12.00 %
SOUTH AFRICA	9.00 %
SPAIN	6.00 %

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

Products/services for which there are good market prospects:

1. Newsprint

Factors contributing to current successful Canadian exports:

- Strong sectoral capability in Canada
- locally established

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Non-competitive financing
- Increased efforts by agents.

- _____
- _____

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LISBON

Market: PORTUGAL

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

Activity: Continuing calls on clients and potential buyers.
Expected Results: Maintain/expand export growth trends.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LISBON

Market: PORTUGAL

Sector : MINE, METAL, MINERAL PROD & SRV

Sub-Sector: MINERALS AND MINERAL PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	178.00 \$M	177.00 \$M	210.00 \$M	220.00 \$M
Canadian Exports	12.00 \$M	17.00 \$M	18.00 \$M	20.00 \$M
Canadian Share of Market	7.00 %	9.60 %	8.00 %	9.00 %

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

Major Competing Countries

Market Share

SOUTH AFRICA	35.00 %
UNITED STATES OF AMERICA	28.00 %
UNITED KINGDOM	3.00 %
AUSTRALIA	3.00 %
COLOMBIA	3.00 %
POLAND	2.00 %

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

Products/services for which there are good market prospects:

1. Coal

Factors contributing to current successful Canadian exports:

- Competitive pricing
- Strong sectoral capability in Canada

Factors for Canadian exports not reaching market potential:

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LISBON

Market: PORTUGAL

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

Activity: Continuing contact with clients.
Expected Results: Maintain/expand exports growth rate.

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

Activity: Incoming energy mission emphasis on thermal coal).
Expected Results: Have thermal coal introduced in country.

DEPARTMENT OF EXTERNAL AFFAIRS

PEMD - Proposed Government Promotional Activities 1990/91

Proposals As Of December 23/89

Post: Lisbon

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Contact</u>
90/06/01	Feira National Agricultura Santarem, Portugal Info Booth, Only	Agri & Food Products & Services
90/09/30	Feira ANMP (Municipal Service Exhibition), Lisbon, Portugal Info Booth, Only	Construction Industry
00/00/00	GIS Portugal Info Booth, Only	

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: LONDON

Country: UNITED KINGDOM

Canadians continue to spend more time cultivating business and personal links with the United Kingdom than with any other country except the United States. The trade and economic infrastructure of the relationship has been constructed upon thousands of individual initiatives over generations.

We forecast that a sense of increasing economic dynamism in Europe, closely associated with the propaganda and substance of the Europe 1992 initiatives will motivate an ever-increasing number of Canadian firms to closely examine and maximize potential UK commercial relationships.

Firms that can dedicate resources to more than FTA - market priorities withing North American cannot help but look carefully at the cash-paying, English-speaking regional European Community import market of some \$60 billion that the UK represents. More than 1,000 existing Canada-UK intracorporate linkages and a multitude of individual professional relationships in business, government, academia and the research community sustain the relationship. Canadian markets in the UK represent one-third of all Canada's exports to the European Community with market penetration on average four times higher than in other Western European markets.

The High Commission and six provincial offices in London plan to service and sustain the existing political/economic and trading relationships without losing the capacity to stimulate new opportunities be they exporting, investment, joint ventures, licencing, tourism or science and technology cooperation.

By the fall of 1989, a strong anti-inflation policy committment had forced UK interest rates to 15% partly to support a currency under pressure from the largest current account deficit (4% of GDP) of any major OECD country. The pound has already depreciated 6% in 1989 but high capacity utilization in a buoyant domestic economy has left little room for export-led expansion. As an economic slowdown takes affect, traditional Canadian undifferentiated commodity exports and industrial inputs can expect stagnant demand and some exporters face declining sales to a rapidly eroding housing sector market.

This slowdown however will not have the same impact on exporters who offer products and services inputs that increase UK international competitiveness or are themselves technological product leaders. Canadian business shows no signs of diminished interest in this marketplace; on the contrary, inquiries regarding new commercial opportunities to which the High Commission responds are running at a rate of over a thousand per month.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 EXPORT PROMOTION PRIORITIES

Mission: LONDON

Country: UNITED KINGDOM

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

1. FOREST PRODUCTS, EQUIP, SERVICES
Forest products exports to the UK (representing 1/3 of Canada's total) increased substantially in 1988 to C\$ 1.3 billion, but a number of trade and related technical issues place this level of exports at risk.
2. ADVANCED TECH. PROD. & SERV
-UK market is expanding rapidly.
-N America is acknowledged source of hi-tech products and services
-increased specialization, well targeted marketing strategy, and careful selection of UK partners have facilitated market entry for new Cdn exporters.
3. AGRI & FOOD PRODUCTS & SERVICE
Competitive pricing is key in this sector and currency fluctuations have for the most part favoured Cdn exporters despite the EEC Common Agricultural Policy.
4. FISHERIES, SEA PRODUCTS & SERV.
-demand is strong and consumption trends are favourable in the UK.
-high prices and shortages of frozen cod disturbed the trade in 1988.
-lobster market looks particularly promising
5. DEFENCE PROGRAMS, PRODUCTS, SERV
Industry-to-industry cooperation continues to broaden. RDP cttee annual mtg sets the stage. Procurement decisions by DND/UKMOD indicate good potential for expanded two-way trade and business cooperation. UK interest in DND procurement projects creates offset opportunities.
6. MINE, METAL, MINERAL PROD & SRV
-Currency fluctuations and price movements should facilitate Canadian access to UK market.
-export volume is significant and trade channels are well established.

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

- | | |
|-------------------------------------|-------------------------------------|
| 1. FOREST PRODUCTS, EQUIP, SERVICES | 4. FISHERIES, SEA PRODUCTS & SERV. |
| 2. MINE, METAL, MINERAL PROD & SRV | 5. CHEM PROD & PETROCHEM, EQP, SERV |
| 3. INDUSTRIAL MACHIN, PLANTS, SERV. | 6. GRAINS AND OILSEEDS |

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LONDON

Market: UNITED KINGDOM

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: SEMI & PROCESSED FOOD & DRINK

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	770.00 \$M	780.00 \$M	800.00 \$M	820.00 \$M
Canadian Exports	16.60 \$M	17.50 \$M	18.00 \$M	20.00 \$M
Canadian Share of Market	2.10 %	2.20 %	2.20 %	2.40 %

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

Major Competing Countries

Market Share

FRANCE	15.00 %
UNITED STATES OF AMERICA	10.00 %
AUSTRALIA	8.00 %
ISRAEL	5.00 %
HUNGARY	2.00 %
MEXICO	1.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. Wild rice
2. Sweet corn
3. Honey
4. Maple syrup
5. Canned vegetables
6. Canned fruit
7. Frozen vegetables (nes)
8. Frozen fruit
9. Beer
10. Wine

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- Fairs and Missions support
- Provincial export promotion
- Competitive pricing
- Canada is one of few sources of supply

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LONDON

Market: UNITED KINGDOM

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Import duties are high
- Restrictive standards
- Lack of promotion and advertising
- Market prospects have not been adequately explored
- _____
- _____

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

Activity: Assist with development of quality/grading standards for Cdn wild rice.

Expected Results: Increased sales of wild rice in UK.

Activity: Promotion of Cdn food products to London hotels.

Expected Results: Greater awareness of Cdn cuisine.

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

Activity: Food Products Mission to E. Canada

Expected Results: Increased sales of Cdn food products

Activity: Wine Mission to UK

Expected Results: Increased sales of Cdn wine.

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

Activity: Encourage Cdn frozen fruit & vegetable produces to exploit niche marketing opportunities.

Expected Results: Incr. sales of "ingredients" e.g. raspberries for jam making

Activity: Help to gain EC approval for Cdn wine appellation.

Expected Results: Greater acceptance of Cdn wines in UK.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LONDON

Market: UNITED KINGDOM

Sector : FISHERIES, SEA PRODUCTS & SERV.

Sub-Sector: FISH & SHELLFISH & OTHER PROD

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1100.00 \$M	1000.00 \$M	1000.00 \$M	1000.00 \$M
Canadian Exports	33.00 \$M	43.00 \$M	35.00 \$M	37.00 \$M
Canadian Share of Market	4.00 %	4.30 %	3.50 %	3.70 %

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

Major Competing Countries	Market Share
ICELAND	12.50 %
NORWAY	7.00 %
DENMARK	6.00 %
OTHER COUNTRIES	3.00 %
NETHERLANDS	2.00 %
INDIA	2.00 %

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

Products/services for which there are good market prospects:

1. Frozen cod
2. Frozen salmon
3. Frozen crab
4. Lobster
5. Frozen shrimp

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector

Factors for Canadian exports not reaching market potential:

- Tendancy to treat UK as residual
- market.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LONDON

Market: UNITED KINGDOM

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

Activity: Continuing liaison with UK purchasers
Expected Results: Increasing awareness of Canada's species.

Activity: Follow up on lobster conference
Expected Results: Increased sales.

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

Activity: Inward buying mission to Atlantic Canada
Expected Results: Increased sales of less common species.

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

Activity: Lobster seminar for cooks
Expected Results: Increased sales.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LONDON

Market: UNITED KINGDOM

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	16000.00 \$M	16500.00 \$M	16500.00 \$M	16500.00 \$M
Canadian Exports	25.00 \$M	30.00 \$M	40.00 \$M	60.00 \$M
Canadian Share of Market	1.00 %	1.00 %	1.00 %	1.00 %

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

Major Competing Countries	Market Share
UNITED KINGDOM	90.00 %
UNITED STATES OF AMERICA	6.00 %
FRANCE	2.00 %
GERMANY WEST	1.00 %
ITALY	1.00 %

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

Products/services for which there are good market prospects:

1. Sonobuoy processors
2. Tank Fire Control computers
3. Digital communication switches
4. ASRAAM Missile
5. Air Navigation Trainer
6. Heavy wheeled tractors
7. Tactical signal simulators
8. RPV submersibles
9. Bomb disposal suits & helmets
10. Aluminium castings
11. Maintenance simulators
12. Electronic Modules.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LONDON

Market: UNITED KINGDOM

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- Fairs and Missions support
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- Willingness of exporters to invest/joint venture in territory

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Non-competitive pricing
- Limited Canadian capabilities
- Tendency to buy natl
- _____
- _____

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

- Activity: Follow up to NBCW Mission
Expected Results: Promotion of JV's between Cdn & UK NBCW coys to pursue mkts.
- Activity: Follow up to Royal Navy Equipment Exhibition.
Expected Results: Promo'n of Cdn naval subsyst. supplies to UKMOD/UK industry.
- Activity: ASW Mission to UK Feb/March 90
Expected Results: Exposure of targetted Cdn ind. to UKMOD opera'l/procur.pers.

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

- Activity: Industry (AIAC) sponsor Farnborough International Aerospace Exhibition - Sept. 90
Expected Results: Promotion of Cdn aerospace products to UK customers/industry

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LONDON

Market: UNITED KINGDOM

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

Activity: Cda/UK RDP Steering Committee - April 90
Expected Results: Identification of coop. defence dvlpmt projs between Cda/UK

Activity: Cdn Company promotions at Canada House
Expected Results: In depth exposure UKMOD opera'l/rqrmnts personnel

Activity: Specialized Defence Products Mission to UK - Spring 91
(follow up to MCM, NBCW and ASW Missions).
Expected Results: In depth exposure UKMOD opera'l/rqrmnts personnel

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LONDON

Market: UNITED KINGDOM

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: COMPUTERS HARD/SOFTWARE & COMP

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	8750.00 \$M	9000.00 \$M	9400.00 \$M	9800.00 \$M
Canadian Exports	70.00 \$M	90.00 \$M	105.00 \$M	120.00 \$M
Canadian Share of Market	1.00 %	1.00 %	1.00 %	1.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	30.00 %
JAPAN	12.00 %
UNITED KINGDOM	1.00 %
OTHER COUNTRIES	10.00 %
GERMANY WEST	9.00 %
FRANCE	7.00 %

Current Status of Canadian

exports in this sector/subsector: Well established and growing

Products/services for which there are good market prospects:

1. Software/Services
2. Data Communications
3. Specialised Hardware

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- _____
- _____

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LONDON

Market: UNITED KINGDOM

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

Activity: Addition to UK industry contacts into Winexport.
Expected Results: More effective sourcing of Agents/Distributors

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

Activity: Canada/UK Marketplace 90 in London
Expected Results: Introduce new companies to UK

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

Activity: Company co-promotions at Canada House
Expected Results: a)Incr. mkt. penetration b)mkt represent'n for new exporters

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LONDON

Market: UNITED KINGDOM

Sector : FOREST PRODUCTS, EQUIP, SERVICES

Sub-Sector: WOOD AND WOOD PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	3200.00 \$M	4300.00 \$M	3800.00 \$M	3500.00 \$M
Canadian Exports	420.00 \$M	600.00 \$M	560.00 \$M	520.00 \$M
Canadian Share of Market	13.00 %	14.00 %	15.00 %	15.00 %

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

Major Competing Countries

Market Share

SWEDEN	15.00 %
FINLAND	13.00 %
UNION OF SOVIET SOC REP	8.00 %
UNITED STATES OF AMERICA	8.00 %

Current Status of Canadian

exports in this sector/subsector: Mature with little growth

Products/services for which there are good market prospects:

1. Softwood lumber
2. Softwood plywood
3. Hardwood lumber
4. Oriental strand board
5. Remanufactured lumber

Factors contributing to current successful Canadian exports:

- Import duties are moderate
- Aggressive marketing
- Trade Fair activity
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LONDON

Market: UNITED KINGDOM

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Restrictive quotas
- _____
- _____

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

Activity: Ongoing Timber Frame Promotion
Expected Results: Increased Product Demand

Activity: Stressed Skin Panel Promotion with COFI
Expected Results: Increased Product sales of plywood

Activity: Inputs re CEN product standards
Expected Results: EC market acceptance

Activity: Addressing plant health issues
Expected Results: UK market acceptance

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

Activity: Interbuild 90
Expected Results: Incr. acceptance timberframe housing stressed skin panelroof

Activity: Oriental Strand Board Mission Outgoing 90
Expected Results: Exploratory

Activity: Timber Frame Mission Incoming 90
Expected Results: Increased acceptance of timber houses.

Activity: Cedar Mission
Expected Results: Exploratory

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LONDON

Market: UNITED KINGDOM

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

Activity: Address Issues of Canadian reputation on Forestry
Expected Results: Product acceptance

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LONDON

Market: UNITED KINGDOM

Sector : FOREST PRODUCTS, EQUIP, SERVICES

Sub-Sector: PULP AND PAPER PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	2350.00 \$M	2400.00 \$M	3300.00 \$M	3750.00 \$M
Canadian Exports	425.00 \$M	605.00 \$M	725.00 \$M	750.00 \$M
Canadian Share of Market	18.00 %	21.00 %	22.00 %	20.00 %

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

Major Competing Countries

Market Share

SWEDEN	26.00 %
FINLAND	15.00 %
UNITED KINGDOM	15.00 %
UNITED STATES OF AMERICA	8.00 %

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

Products/services for which there are good market prospects:

1. Newsprint
2. Groundwood Specialties
3. Kraft Pulp

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Import duties are high
- Restrictive quotas

- _____
- _____

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LONDON

Market: UNITED KINGDOM

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

Activity: Representation on Newprint Quota
Expected Results: Improved Access

Activity: Addressing Issue of Canadian Forest Management Practices
Expected Results: Better product acceptance

Activity: Addressing Issue of Pulp Dioxins
Expected Results: Better product acceptance

Activity: Representation on Groundwood Specialties
Expected Results: Improved access

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

Activity: Direct meeting with major buyers of Canadian products
Expected Results: Better product acceptance

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LONDON

Market: UNITED KINGDOM

Sector : MINE, METAL, MINERAL PROD & SRV

Sub-Sector: MINERALS AND MINERAL PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	9900.00 \$M	9300.00 \$M	9500.00 \$M	9800.00 \$M
Canadian Exports	635.00 \$M	620.00 \$M	630.00 \$M	640.00 \$M
Canadian Share of Market	6.90 %	6.70 %	6.60 %	6.50 %

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

Major Competing Countries

Market Share

EUROPEAN COMMON MARKET C	30.00 %
SWITZERLAND	28.00 %
SOUTH AFRICA	8.00 %
UNITED STATES OF AMERICA	8.00 %

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

Products/services for which there are good market prospects:

1. Coal
2. Iron ore
3. Precious metals concentrates
4. Nickel concentrates
5. Zinc concentrates
6. In concentrates

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- Willingness of exporters to invest/joint venture in territory
- Currency fluctuations can

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LONDON

Market: UNITED KINGDOM

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing

-

-

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

Activity: Continue liaison with asbestos associations to monitor developments in legislations.

Expected Results: Regular reports to be made.

Activity: Work on establishing LME warehouse in Canada

Expected Results: Regular reports to be made.

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

Activity: Maintain existing and expand range of contacts with buyers of Canada's mineral products, eg British Steel.

Expected Results: Holding/incr. Cda's share of the mkt for min. such as i.ore.

Activity: Up-date existing and prepare additional market profiles.

Expected Results: Strategic analysis of sector/ident. of trade policy/promo'n

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LONDON

Market: UNITED KINGDOM

Sector : MINE, METAL, MINERAL PROD & SRV

Sub-Sector: METALS, PRIMARY & FABRICATED

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	10500.00 \$M	11000.00 \$M	11500.00 \$M	12000.00 \$M
Canadian Exports	230.00 \$M	240.00 \$M	300.00 \$M	330.00 \$M
Canadian Share of Market	2.20 %	2.20 %	2.60 %	2.80 %

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

Major Competing Countries

Market Share

EUROPEAN COMMON MARKET C	6.00 %
UNITED STATES OF AMERICA	5.50 %
SWEDEN	5.50 %
NORWAY	4.60 %
SWITZERLAND	2.70 %
AUSTRALIA	2.40 %

Current Status of Canadian

exports in this sector/subsector: Mature with little growth

Products/services for which there are good market prospects:

1. Copper
2. Lead
3. Nickel
4. Zinc
5. Magnesium

Factors contributing to current successful Canadian exports:

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LONDON

Market: UNITED KINGDOM

Factors for Canadian exports not reaching market potential:

- Currency fluctuations can inhibit
- sales to this market.

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

Activity: Actively encourage formation of nickel and copper study groups
Expected Results: Establishment of Study groups.

Activity: Continued monitoring and reporting on the international metals scene.
Expected Results: Periodic insights into market activities.

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

Activity: Up-date existing and prepare additional market profiles of the sub-sector.
Expected Results: Identify policy/promotion needs and opportunities.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LONDON

Market: UNITED KINGDOM

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: APPAREL (CLOTH,FUR,SHOES) TEXT

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	39800.00 \$M	43000.00 \$M	45800.00 \$M	47000.00 \$M
Canadian Exports	0.00 \$M	39.00 \$M	41.00 \$M	42.00 \$M
Canadian Share of Market	0.00 %	1.00 %	1.00 %	1.00 %

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

Major Competing Countries

Market Share

HONG KONG	20.00 %
GERMANY WEST	15.10 %
ITALY	11.60 %
BELGIUM	11.50 %
FRANCE	7.30 %
NETHERLANDS	6.50 %

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

Products/services for which there are good market prospects:

1. Childrens Wear
2. Leisure Wear
3. Womens Fashions
4. Carpets
5. Apparel Textiles
6. Furnishing Fabrics

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- Strong sectoral capability in Canada

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LONDON

Market: UNITED KINGDOM

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Import duties are high
- Non-competitive pricing
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored
- Lack of export commitment. It
- takes approx 3 yrs to acquire mkts

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

- Activity: Market re-assessment - Updating of trade contacts and sources for market intelligence.
Expected Results: Availability of good data base for potential exporters.
- Activity: Preparation of market research report.

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

- Activity: Up-dating of contacts and re-assessment of market for Canadian products.
- Activity: Send Post Observer to world clothing trades fair. First showing scheduled for Aug 1990. Nat. Exhib. Centre.
- Expected Results: Assess. of suitab. of this new fair/venue for Cdn exporters

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LONDON

Market: UNITED KINGDOM

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: LEISURE PROD. TOOLS HARDWARE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	2540.00 \$M	3000.00 \$M	4000.00 \$M	4500.00 \$M
Canadian Exports	4.00 \$M	6.00 \$M	8.00 \$M	9.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	0.00 %

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

Major Competing Countries

Market Share

TAIWAN	26.40 %
UNITED STATES OF AMERICA	18.40 %
GERMANY WEST	6.70 %
JAPAN	4.90 %
FRANCE	3.50 %

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

Products/services for which there are good market prospects:

1. Ice Hockey Equipment
2. Ice Rink Equipment
3. Golf Clubs
4. Leisure Marine Craft
5. Gymnasium Equipment

Factors contributing to current successful Canadian exports:

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LONDON

Market: UNITED KINGDOM

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- Limited Canadian capabilities
- Long term commitments are usually
- necessary to penetrate this market,

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

Activity: Updating of trade contacts and sources for market intelligence.

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

Activity: Visit ISPO Feb 1990
Expected Results: Identify potential new exporters.

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: LONDON

Country: UNITED KINGDOM

The mission reports that the approximate flows to all countries of investment from its country/territory in Canadian \$ is as follows: (including portfolio flows if a primary focus)

	Total (\$ Million)	Canadian Share	Major Competitor Share
Two years ago	31000.00	6.40	79.00
One year ago	28770.00	4.50	85.00
Current year	26700.00	5.00	75.00

The mission is of the opinion that Canada can reasonably expect to attract the following amount of foreign investment from its territory/country next year:

\$2.5 billion (gross FDI, excluding portfolio, including reinvestment).

Canada's major competitors for investment from this territory/country are:

- USA
- Netherlands
- Australia
- Spain
- France
- Germany

The following types of activities are currently being undertaken by Canada's major competitors to attract investment from this territory/country:

- US corporate matchmaking (includes M & A Seminars)
Invest in USA Seminars.
Visits by US States (Governors and Blue-Chip Corporations).
Doing Business in Australia Seminars

IDP Partners and related program activities:

- Provinces (6 resident delegations and 2 non-resident)
 - Joint Seminars & investor servicing, EI promotion.

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: LONDON

Country: UNITED KINGDOM

IDP Partners and related activities cont d:

Canadian investment intermediaries (Banks, Law Firms,
Accountants, Security Houses)

- Seminars, Tech literature, Corporate liaison, Briefings

Canada-UK Chamber of Commerce

- Seminars, Lunch Meetings, Contacts.

British Institutions: DTI CBI IOD

- Contacts, Facilities, Special Events

Industrial Associations: SMMT ABHI ADOI ETC

- Mail Campaigns, 1 on 1 meetings, Contacts

Compared to major competitive destinations, Canada is perceived to have

the following advantages:

- FTA
- Profitability of the economy
- Dynamism of the Economy
- Human Resources.
- Political Stability

the following constraints:

- Taxation
- Government Regulation
- High Government Debt
- Market Size and Dispersion

The mission indicates the following potential for various types of investment from within its territory/country:

Type of Investment	Potential
Portfolio	HIGH
Acquisition	HIGH
Greenfield	LOW
Joint Venture	MEDIUM
Strategic Partnering	MEDIUM
Technology Licensing	HIGH

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: LONDON

Country: UNITED KINGDOM

The mission believes that the following sectors are of greatest interest to investors in its territory/country an assigned ranking A = High B = Medium C = Low

Sector	Ranking
Agriculture/Food/Fish	B
Resource Processing	B
Machinery and Equipment	C
Transportation	C
Consumer Products	C
Commercial Service	A
Computer and Communications	B
Health Care Products/Medical	A
Aerospace and Defence	A
Strategic Technologies	A

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: LONDON

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

Seq #	Date
Type: MISSION OUT, MINISTERIAL	
3	06/90
Event Description: ISTC;the new Govt/industry alliance strategic technologies	
City :	
Country :UNITED KINGDOM	
Investment Nature:All	
Investment Sector:MULTIPLE INVESTMENT SECTORS	
Event Cooperants :	
ISTC INVCDA	
Estimated Budget : \$1,500.00	
Type: MISSION OUT, INDUSTRY	
9	04/90
Event Description: Health Care - Follow-up to Bios Project.	
City :	
Country :UNITED KINGDOM	
Investment Nature:Joint Venture	
Strategic Part.	
Tech.Licensing	
Investment Sector:HEALTH CARE PRODUCTS/MEDICAL	
Event Cooperants :	
ISTC INVCDA	
Estimated Budget : \$1,000.00	
13	05/90
Event Description: Opt Electronics in conj w/Cda/FRG Study.	
City :	
Country :UNITED KINGDOM	
Investment Nature:Joint Venture	
Strategic Part.	
Tech. Licensing	
Investment Sector:MULTIPLE INVESTMENT SECTORS	
Event Cooperants :	
ISTC in Cda	
Estimated Budget : \$1,000.00	

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: LONDON

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

Seq #	Date
Type: MISSION OUT, INDUSTRY	
14	10/90
Event Description: Venture backed companies in conj w/inc project.	
City :	
Country : UNITED KINGDOM	
Investment Nature: Joint Venture	
Strategic Part.	
Tech. Licensing	
Investment Sector: STRATEGIC TECHNOLOGIES	
Event Cooperants :	
INVCDA	
Estimated Budget : \$2,500.00	
10	05/90
Event Description: Marine Technology: F/up Oceanology 90.	
City :	
Country : UNITED KINGDOM	
Investment Nature: Joint Venture	
Strategic Part.	
Tech. Licensing	
Investment Sector: MULTIPLE INVESTMENT SECTORS	
Event Cooperants :	
ISTC TDS	
Estimated Budget : \$1,000.00	
12	04/90
Event Description: UK Exporters - Follow up to DM	
City :	
Country : UNITED KINGDOM	
Investment Nature: All	
Investment Sector: MULTIPLE INVESTMENT SECTORS	
Event Cooperants :	
ISTC ADMS	
Estimated Budget : \$1,000.00	

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: LONDON

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

Seq #	Date
Type: SEMINAR, ABROAD	
2	05/90
Event Description: Financial update	
City :	
Country : UNITED KINGDOM	
Investment Nature: All	
Investment Sector: MULTIPLE INVESTMENT SECTORS	
Event Cooperants :	
FIN INVCDA	
Estimated Budget : \$1,500.00	
19	02/91
Event Description: Entrepreneurial Immigration Counselling Session + Reception.	
City :	
Country : UNITED KINGDOM	
Investment Nature: All	
Investment Sector: MULTIPLE INVESTMENT SECTORS	
Event Cooperants :	
Provs RWP	
Estimated Budget : \$1,500.00	
1	04/90
Event Description: FTA update-mint	
City :	
Country : UNITED KINGDOM	
Investment Nature: All	
Investment Sector: MULTIPLE INVESTMENT SECTORS	
Event Cooperants :	
INVCDA	
Estimated Budget : \$5,000.00	
Type: DIRECT MAIL CAMPAIGN	
7	09/90
Event Description: Free Trade update	
City :	
Country : UNITED KINGDOM	
Investment Nature: All	
Investment Sector: MULTIPLE INVESTMENT SECTORS	
Event Cooperants :	
INVCDA	
Estimated Budget : \$1,000.00	

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: LONDON

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

Seq #		Date
	Type: DIRECT MAIL CAMPAIGN	
5	Event Description: Investment Data Base Development City : Country : UNITED KINGDOM Investment Nature: All Investment Sector: MULTIPLE INVESTMENT SECTORS Event Cooperants : TPE INVCDA Estimated Budget : \$4,000.00	04/90
	Type: OTHER PROMOTION	
4	Event Description: Pres of Inv Cda: Briefing for investors. City : Country : UNITED KINGDOM Investment Nature: All Investment Sector: MULTIPLE INVESTMENT SECTORS Event Cooperants : INVCDA Estimated Budget : \$1,500.00	10/90
18	Event Description: EI Communications Campaign City : Country : UNITED KINGDOM Investment Nature: All Investment Sector: MULTIPLE INVESTMENT SECTORS Event Cooperants : Provs RWP Estimated Budget : \$20,000.00	03/90
6	Event Description: Promotional lit: Testimonials City : Country : UNITED KINGDOM Investment Nature: All Investment Sector: MULTIPLE INVESTMENT SECTORS Event Cooperants : CRO's INVCDA Estimated Budget : \$2,000.00	04/90

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: LONDON

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

Seq #	Date
Type: OTHER PROMOTION	
11	03/91
Event Description: Oceanology 91	
City :	
Country : UNITED KINGDOM	
Investment Nature: Joint Venture	
Strategic Part.	
Tech. Licensing	
Investment Sector: MULTIPLE INVESTMENT SECTORS	
Event Cooperants :	
ISTC TDS	
Estimated Budget : \$5,000.00	
8	10/90
Event Description: Info Booth at DTI Technology Show	
City :	
Country : UNITED KINGDOM	
Investment Nature: All	
Investment Sector: MULTIPLE INVESTMENT SECTORS	
Event Cooperants :	
INVDA NRC	
Estimated Budget : \$10,000.00	
15	11/90
Event Description: CBI confed and exhibition possible info booth	
City :	
Country : UNITED KINGDOM	
Investment Nature: All	
Investment Sector: MULTIPLE INVESTMENT SECTORS	
Event Cooperants :	
INVDA	
Estimated Budget : \$10,000.00	
17	05/90
Event Description: Communications 90	
City :	
Country : UNITED KINGDOM	
Investment Nature: Joint Venture	
Strategic Part.	
Tech. Licensing	
Investment Sector: COMPUTER/COMMUNICATIONS	
Event Cooperants :	
ISTC/IITI	
Estimated Budget : \$1,000.00	

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: LONDON

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

Seq # Date

Type: OTHER PROMOTION

16	Event Description:		05/90
		British Electronics Week	
	City :		
	Country :	UNITED KINGDOM	
	Investment Nature:	Joint Venture	
		Strategic Part.	
		Tech. Licensing	
	Investment Sector:	COMPUTER/COMMUNICATIONS	
	Event Cooperants :		
		ISTC/IITI	
	Estimated Budget :	\$1,000.00	

Total estimated budget for all proposals: \$71,500.00

DEPARTMENT OF EXTERNAL AFFAIRS

PEMD - Proposed Government Promotional Activities 1990/91

Proposals As Of December 23/89

Post: London

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Contact</u>
90/04/08	European Buyers To The Auto Industry Assoc. Show, Montreal Mission In, To Fair	Transport System, Equip Comp, & Services
90/04/24	Communications '90 Birmingham U.K. Fair, National Stand	Advanced Tech. Products G.Cote/D.Adams
90/04/24	British Electronics Week, Lonkon, U.K. Info Booth, Only	Advanced Tech. Procuets & Services S.Waterfall
90/05/00	U.K. Fish Buyers Mission To Atlantic Canada Mission In, To Industry	Fisheries, Sea Products & Services
90/05/00	Softwood Lumber Mission to U.K. Mission Out, Industry	Forest Products, Equip & Services
90/07/00	Royal Agricultural Show Stoneleigh, United Kingdom Info Booth, With Group	Agri & Food Products & Services
90/09/00	Secondary Wood Products Mission From U.K. Mission In, To Industry	Forest Products, Equip & Services
90/10/00	Food Products Mission From U.K. To Eastern Canada Mission In, To Industry	Agri & Food Products & Services
90/10/00	U.K. Timber Frame Housing Study Tour To Canada Mission In, To Industry	Forest Products, Equip & Services
90/10/00	British Importers Confederation To Canada Mission In, To Industry	
90/11/19	Interplas Birmingham, United Kingdom Fair, National Stand	Industrial Machine, Plants & Services

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: MADRID

Country: SPAIN

Spain will remain one of the fastest growing economies in Western Europe 1990. GNP growth is likely to continue to be above the EEC average although less rapidly than in recent years. At present it is expected that 1989 GNP growth will be in the 4.6% range. The OECD predicts a slightly slower growth rate in 1990 of 4% which will place Spain just behind Switzerland. Industrial investment has increased substantially in recent years and in 1989 will increase by some 13%. The present inflation rate of 6.8% while not wholly satisfactory is far better than that which existed in 1982 (14.5%)

This considerable achievement could be somewhat moderated by the rapidly increasing current account deficit fueled by a feverish demand for durables and consumer goods and sluggish export results. The current account deficit is expected to hit over \$10 billion in 1989. The pressure this places on the balance of payments is already starting to be evident, although foreign reserves are still high at \$46 billion. Total foreign debt is estimated at \$31 billion. Foreign longterm investment will not increase as spectacularly as in the past (1988/89 increase 65%) when returns on the recent investments start to flow out. The Government is moving to slowdown a somewhat overheated economy by increasing income taxes and tightening credit and reducing the increases in government budgets. On the other hand, public sector external debt should remain within acceptable levels (2.5-3% of GDP). The current unemployment rate of around 17% is likely to decrease gradually by a yearly 1% to 2% through 1993. The recent entry of the peseta in the E.M.S. gives a certain guarantee for its stability in the longterm.

While some cooling of the Spanish economy will occur in 1990, Spain will remain a significant market for foreign suppliers. The Government is presently embarking on a nationwide road and railway building program and construction has begun on the Seville World's Fair and the Olympics Site in Barcelona both scheduled for 1992. Combined with strong domestic demand which should go on unabated, this makes Spain an increasingly enticing objective for Canadian exporters.

Canadian trade with Spain is expanding rapidly. 1989 should see exports of some \$350 million an increase of \$100 million over 1988. Trade, investment and technology transfers potential remains excellent. Spanish private sector interest in joint-ventures with Canadian companies is high and will become more so as Spain confronts the challenge of competition from its European partners as a result of The Single Market. Considerable export potential exists for: Animal breeding stock and semen; fisheries products; resource products such as wood products, asbestos, copper ore and iron and steel products; defense equipment; communications equipment and software; transportation equipment; environmental control equipment; mining equipment; construction equipment; medical and hospital equipment; specialized technology related to control and automation systems; distribution networks, biotechnology and new materials; and leisure products and services.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 EXPORT PROMOTION PRIORITIES

Mission: MADRID

Country: SPAIN

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

1. **ADVANCED TECH. PROD. & SERV**
Rapidly changing communications regulatory environment has created an expanded market for telecommunications, broadcast, cable and satellite TV equipment and services.
2. **TRANSPORT SYS, EQUIP, COMP, SERV.**
Spanish governments at all levels remain committed to the construction of urban transportation systems extension in Madrid and Barcelona. There is potential for commuter aircraft sales. Railway modernization offers opportunities for Canadian exporters. Consulting services for Traffic Control.
3. **DEFENCE PROGRAMS, PRODUCTS, SERV**
Spain will continue to turn to foreign suppliers for major defense procurement. Local firms remain interested in joint ventures and industrial cooperation with Canadian companies.
4. **MULTIPLE SECTORS**
Spanish industry will have to spend \$12 billion over next five years to meet EC environmental standards. Mining, textile and construction sectors must reduce atmospheric emission, organic residues and water contamination. Spanish environmental firms are capable of only a very small response to looming demand.
5. **FISHERIES, SEA PRODUCTS & SERV.**
Spain has the second largest per capita consumption of Fish Products in the world. Annual imports have reached \$1.8 billion. Attractive pricing and a good product mix have encouraged Spanish importers to increasingly source in Canada.
6. **EDUCATION, MEDICAL, HEALTH PROD**
Recent promotional efforts by Post and Ottawa have resulted on significantly improved exports of high tech Canadian products to this market. Given the wide gap that exists between Spain and other EC countries in health care services and a limited domestic supply situation the outlook for Cdn hi-tech medical products will remain bright.

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

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MADRID

Market: SPAIN

Sector : FISHERIES, SEA PRODUCTS & SERV.

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1585.00 \$M	1743.00 \$M	1830.00 \$M	1922.00 \$M
Canadian Exports	5.49 \$M	9.42 \$M	9.00 \$M	10.00 \$M
Canadian Share of Market	0.35 %	0.54 %	0.49 %	0.52 %

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

Major Competing Countries

Market Share

SPAIN	50.00 %
EUROPEAN COMMON MARKET C	18.00 %
ARGENTINA	3.00 %
MOROCCO	2.00 %
CHILE	2.00 %
ICELAND	1.00 %

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

Products/services for which there are good market prospects:

1. Wet-Salted Cod Fillets
2. Frozen Flounder, Plaice & similar
3. Fresh & Frozen Cod incl. Fillets
4. Frozen Fish Blocks various species
5. Live Clams
6. Live Lobster
7. Frozen Illex Squid
8. Frozen Monkish Tails
9. Frozen Shrimps
10. Canned Salmon
11. Frozen Salmon
12. Live Goosneck Barnacles

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Fairs and Missions support
- Competitive pricing

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MADRID

Market: SPAIN

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- Insufficient interest on part of Cd
- n exporters

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

Activity: Prepare Fish Products Strategy through 1994 to guide Canadian exporters and Govt departments
Expected Results: Double Fish Products sales.

Activity: Assist major Canadian exporters to establish joint ventures, agencies and distribution channels in Spain.
Expected Results: Increased strategic alliances between Cdn. & Span. firms

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

Activity: Incoming Fisheries Mission to Atlantic Provinces June 1990.
Expected Results: Increased Fish Products Sales & JV's.

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

Activity: In store promotion of Canadian Fish and Selfish in El Corte Ingles.
Expected Results: Improved Spanish awareness of quality & value of Cdn seafood

Activity: Step up contacts in Span fishing cos interested in investing in Cdn fisheries.
Expected Results: Improve access to Spanish market & 3rd country markets.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MADRID

Market: SPAIN

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	800.00 \$M	1000.00 \$M	1400.00 \$M	1600.00 \$M
Canadian Exports	3.00 \$M	12.00 \$M	29.00 \$M	60.00 \$M
Canadian Share of Market	0.40 %	1.20 %	1.80 %	3.75 %

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

Major Competing Countries

Market Share

SPAIN	40.00 %
UNITED STATES OF AMERICA	25.00 %
FRANCE	20.00 %
GERMANY WEST	5.00 %
UNITED KINGDOM	4.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. F-18 Fuel Tanks
2. F-5 Performance Enhancement
3. New Frigate Programme
4. F-18 Simulator Software Upgrading
5. ASW Equipment
6. SEI Bambi Buckets for Fire Fighting

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- Willingness of exporters to invest/joint venture in territory

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MADRID

Market: SPAIN

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Cdn firms must be prepared to discuss industrial cooperation agmts

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

Activity: Encourage Spanish Defense Manufacturers Assoc. (AFARMADE) to take mission to Canada.

Expected Results: Industrial cooperation agmts between Cdn. & Span cos.

Activity: Define new Spanish Defense Equipment requirements in light of decreasing dedicated budgets in this sector.

Expected Results: Qualification of market potential for Cdn firms.

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

Activity: Prepare Report on Spanish Defense R&D priorities.

Expected Results: Spain will invest \$3 billion in Defense R&D through 1994.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MADRID

Market: SPAIN

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

European Fighter Aircraft	Approximate Value: 4000 M\$
	Financing Source : DOM - Domestically funded
	Contact : Alan Virtue (613)996-0639
NATO Frigate Replacement NFC90	Approximate Value: 10000 M\$
	Financing Source : DOM - Domestically funded
	Contact : Alan Virtue (613)996-0639

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MADRID

Market: SPAIN

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1521.73 \$M	2501.48 \$M	4090.00 \$M	5726.00 \$M
Canadian Exports	7.80 \$M	8.80 \$M	15.40 \$M	21.00 \$M
Canadian Share of Market	0.51 %	0.35 %	0.38 %	0.36 %

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

Major Competing Countries	Market Share
SPAIN	40.00 %
UNITED STATES OF AMERICA	20.00 %
JAPAN	20.00 %
SWEDEN	8.00 %
GERMANY WEST	6.00 %
ITALY	4.00 %

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

Products/services for which there are good market prospects:

1. Telecons Equip and Services
2. Computer Software and Systems
3. Instrumentation and Process Controls
4. Broadcast and Cable TV
5. Remote Sensing Equipment and Services
6. Robotics Artificial Intelligence

Factors contributing to current successful Canadian exports:

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MADRID

Market: SPAIN

Factors for Canadian exports not reaching market potential:

- Market prospects have not been adequately explored
- Homologation requirements until new
- LOT regulations (come into force)

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

Activity: Report on Computer Software market for distribution in Canada.

Expected Results: Increased interest of Cdn Industry in Spanish Market.

Activity: Report on Cable TV regulations.

Expected Results: Better informed Canadian companies.

Activity: Assist Northern Telecom in their efforts to establish sales in Spain.

Expected Results: Sales of PABX and PAD equipment.

Activity: Continue to support IMAX efforts to expand sales in Spain.

Expected Results: Sales of 3 theaters.

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

Activity: Informat 90 June 1990

Expected Results: Sales and appointment of Agents by Cdn cos.

Activity: TV Broadcast Mission to Canada Sept90.

Expected Results: Prospects are good in an expanding market.

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MADRID

Market: SPAIN

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

- Activity: Determine joint venture opportunities in telecommunications sector.
Expected Results: Cdn participation cld result-\$100 million in sales over 3yrs
- Activity: Assist Cdn Remote Sensing companies in their efforts to penetrate Spanish market.
Expected Results: Market potential cld be \$10 million.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MADRID

Market: SPAIN

Sector : TRANSPORT SYS, EQUIP, COMP, SERV.

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	2700.00 \$M	3200.00 \$M	3800.00 \$M	4400.00 \$M
Canadian Exports	7.00 \$M	14.00 \$M	16.00 \$M	20.00 \$M
Canadian Share of Market	0.25 %	0.43 %	0.42 %	0.45 %

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

Major Competing Countries

Market Share

SPAIN	70.00 %
GERMANY WEST	10.00 %
FRANCE	10.00 %

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

Products/services for which there are good market prospects:

1. Urban Transportation
2. Commuter Aircraft
3. Railway Equipment
4. Consulting Services
5. Automotive Parts Joint Ventures

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Provincial export promotion
- Competitive pricing
- Canada is one of few sources of supply
- Willingness of exporters to invest/joint venture in territory

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MADRID

Market: SPAIN

Factors for Canadian exports not reaching market potential:

- Limited appreciation/understanding of distribution system
- Limited Canadian capabilities
- Market prospects have not been adequately explored
- _____
- _____

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

Activity: Continue to support UTDC efforts to land Barcelona & Madrid Subway contracts.

Expected Results: Cdn. companies well placed to win both contracts.

Activity: Continue to support De Havilland/Boeing efforts to sell/lease DASH-8 to WERNITZ AIR airline.

Expected Results: Possible sale/lease 2/3 DASH-8.

Activity: Calling on RENFE to discuss import requirements for Railway equipment.

Expected Results: Cdn. suppliers will be advised of any opportunities.

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

Activity: Define need for Traffic Control Consulting Services in Madrid and Barcelona.

Expected Results: Cdn. consultants may bid in JV with local partners.

Activity: See Local Automotive parts assoc. to define potential for JV's.

Expected Results: Potential for Cdn cos interested in JVs.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MADRID

Market: SPAIN

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

Modernization of Span Railway Approximate Value: 10000 M\$
 Financing Source : DOM - Domestically funded
 Contact : R.Noble Tlx 27347 DOMCA E

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MADRID

Market: SPAIN

Sector : EDUCATION, MEDICAL, HEALTH PROD

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

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	472.00 \$M	542.80 \$M	607.70 \$M	729.20 \$M
Canadian Exports	4.08 \$M	4.56 \$M	5.59 \$M	7.70 \$M
Canadian Share of Market	0.86 %	0.84 %	0.98 %	1.05 %

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

Major Competing Countries

Market Share

GERMANY WEST	23.00 %
UNITED STATES OF AMERICA	21.00 %
JAPAN	11.00 %
SPAIN	10.00 %
ITALY	8.80 %
FRANCE	8.50 %

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

Products/services for which there are good market prospects:

1. Advanced Technology Hospital Equipment
2. Civil Protection Medical Equipment
3. Diagnostic Products
4. Disposable Health-Care Products

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Fairs and Missions support
- Provincial export promotion
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- Willingness of exporters to invest/joint venture in territory

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MADRID

Market: SPAIN

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
 - Market prospects have not been adequately explored
 - Homologation can take fm 2/3 yrs.
-

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MADRID

Market: SPAIN

Sector : MULTIPLE SECTORS

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	320.00 \$M	400.00 \$M	1000.00 \$M	3300.00 \$M
Canadian Exports	0.00 \$M	1.00 \$M	1.00 \$M	10.00 \$M
Canadian Share of Market	0.00 %	0.25 %	0.10 %	0.30 %

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

Major Competing Countries	Market Share
SPAIN	30.00 %
GERMANY WEST	25.00 %
ITALY	8.90 %
UNITED KINGDOM	7.80 %
FRANCE	7.30 %
UNITED STATES OF AMERICA	5.00 %

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

Products/services for which there are good market prospects:

1. Atmospheric Emissions Reduction Equipment
2. Measurement & Control Systems with Energy Sector
3. Water Pollution Control Equipment
4. Waste Treatment Equipment
5. Toxic/Hazardous Waste Treatment Equipment

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Fairs and Missions support
- Provincial export promotion
- Strong sectoral capability in Canada
- Willingness of exporters to invest/joint venture in territory

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MADRID

Market: SPAIN

Factors for Canadian exports not reaching market potential:

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

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

Activity: Environmental Mission to Canada - Montreal-Toronto-Vancouver
Expected Results: 6 Tech.Transfer Agreements.Attract 4/6 new Cdn cos to Sp Mkt

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

Activity: Establish direct contact with major local cos in sector to introduce Cdn expertise and equipment to JVs.
Expected Results: Stimulate interest in market visits with object JV&TEC Trans

Activity: Incoming Mission from Canada.
Expected Results: Direct exports and 2/3 Tech Transfer agreements.

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: MADRID

Country: SPAIN

The mission reports that the approximate flows to all countries of investment from its country/territory in Canadian \$ is as follows: (including portfolio flows if a primary focus)

	Total (\$ Million)	Canadian Share	Major Competitor Share
Two years ago	2507.00	0.10	64.00
One year ago	350.30	0.09	61.00
Current year	1714.00	0.12	60.00

The mission is of the opinion that Canada can reasonably expect to attract the following amount of foreign investment from its territory/country next year:

Direct \$42 million Portfolio \$25 million

Canada's major competitors for investment from this territory/country are:

- Holland
- Switzerland
- France
- Portugal
- U.K.
- Luxembourg

The following types of activities are currently being undertaken by Canada's major competitors to attract investment from this territory/country:

- Investment Seminars.
Corporate calling program undertaken by Span-Dutch Chamber of Commerce on behalf as Investment Development office in Dutch Ministry of Economic Affairs.
Responsive Counselling plus active generic advertising.

IDP Partners and related program activities:

- Council of Spanish Business Organisations (CEOE)
 - Mission to Canada/Seminars in Spain

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: MADRID

Country: SPAIN

IDP Partners and related activities cont d:

ICEX

- Seminars in Spain

REPSOL

- Visits to Canada

Raymond Chabot International Ltd.

- Seminars

Ontario Government (Paris)

- Seminars in Spain

Quebec Government (Paris)

- Seminars in Spain

Asociacion Hispano-Canadiense

- Seminars in Spain

Banco Popular

- Cooperation with Caisse Desjardins

Royal Bank of Canada

- Corporate Seminars in Spain

Compared to major competitive destinations, Canada is perceived to have

the following advantages:

- Access to North America Markets as a result of the Trade Agreement
- Ease of doing business
- Government financial incentives
- Availability of skilled labour low cost energy high technology
- Quality of Life.

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: MADRID

Country: SPAIN

the following constraints:

- Lack of knowledge about Canada
- Distance
- Language/Culture

The mission indicates the following potential for various types of investment from within its territory/country:

Type of Investment	Potential
Portfolio	MEDIUM
Acquisition	MEDIUM
Greenfield	LOW
Joint Venture	HIGH
Strategic Partnering	HIGH
Technology Licensing	MEDIUM

The mission believes that the following sectors are of greatest interest to investors in its territory/country an assigned ranking A = High B = Medium C = Low

Sector	Ranking
Agriculture/Food/Fish	B
Resource Processing	A
Machinery and Equipment	B
Transportation	C
Consumer Products	C
Commercial Service	B
Computer and Communications	C
Health Care Products/Medical	B
Aerospace and Defence	C
Strategic Technologies	A

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: MADRID

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

Seq #	Date
Type: SEMINAR, ABROAD	
2	04/90
Event Description: Investment seminars with key Government speakers from Canada.	
City : Mad/Bcna/Pamplona	
Country : SPAIN	
Investment Nature: All types	
Investment Sector: COMMERCIAL SERVICE	
Event Cooperants :	
ICEX	
Estimated Budget : \$15,000.00	
Type: MISSION IN, TO INDUSTRY	
1	05/90
Event Description: Fact finding mission to Canada by key owners of Spanish Industry.	
City : Ott/Trnto/Mtl/Vncvr	
Country : CANADA	
Investment Nature: All types	
Investment Sector: COMMERCIAL SERVICE	
Event Cooperants :	
CEOE	
Estimated Budget : \$0.00	

Total estimated budget for all proposals: \$15,000.00

DEPARTMENT OF EXTERNAL AFFAIRS

PEMD - Proposed Government Promotional Activities 1990/91

Proposals As Of December 23/89

Post: Madrid

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Contact</u>
90/04/24	Water & Wastewater 90 Madrid, Spain Info Booth, Only	Industrial Machine, Plants & Services S. Waterfall
90/06/00	Fisheries Buyers Mission From Spain To Atlantic Provinces Mission In, To Industry	Fisheries, Sea Products & Services
90/06/04	Informat/Expotronica Barcelona, Spain Fair, National Stand	Advanced Tech. Products & Services G. Cote/ S. Waterfall
90/09/00	TV Broadcast Mission From Spain Mission In, To Industry	Advanced Tech. Products & Services

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: OSLO

Country: NORWAY

The forecasted growth rate for the Norwegian economy is 1.5%. The contribution of the oil and gas and ferrous mineral sectors will help Norway to post this modest growth. If one nets out the contribution of these two sectors, the remaining sectors of the economy will post a negative growth rate of -.5%. One sector which has been hit the hardest is the aquaculture industry where there have been numerous bankruptcies as producers face smaller margins on farmed salmon.

The new government, as a priority measure, has been examining the possibility of reducing the deficit of a forecasted 3 billion CDN dollars through stricter control of government expenditures. The result of the reduced government spending will dampen an already sluggish economy where consumer demand is expected to about 3%. Government cuts are expected to be felt in all Ministries except the Ministries of Environment, Defence, International Development (equivalent to CIDA in function) and Justice. Government is hoping to cut 1 billion CDN from the previous government's budget.

The government is expected to stimulate employment. Unemployment has doubled over the past two years moving from almost full employment to a rate of 4.5% unemployment. It is not clear how the government is proposing to increase the level of employment in view of its proposed spending cuts.

This will be the first year that two way trade between Canada and Norway over the \$1 billion CDN level. This is an impressive growth figure which demonstrates the potential of this market.

Norway must continue to develop more efficient means of production in all sectors including oil and gas thus giving opportunities for Canadian exporters in several areas: Defence programs and products (including aerospace); oil and gas equipment and services; telecommunications including space developments such as RADARSAT and environmental equipment. The latter is a change in the priorities of the mission. This is due in part Norway's hosting of the World Commission on Environment and Development--Regional follow-up Conference organized by the Government of Norway and the Economic Commission for Europe and also due to the continuing governmental commitment to the environment.

ICELAND

In 1989/90, RWT and the mission in Oslo organized a CANADA Event which included participation of firms who were on the Nordic Mission. At least 80% of these firms indicated that there were commercial possibilities. This exemplifies the ICELANDIC market. It is growing where CIF value of imports in 1989 is forecasted to be

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: OSLO

Country: NORWAY

US 2.1 billion. About 40% will be spent on consumer goods, 30% on primary products and intermediate goods, and 30% on investment goods. Total CDN exports in 1988 were \$10.8 million and are expected to be \$12.0 million for 1989.

The performance of the Icelandic economy is controlled by the success of its fishing industry. Forecasts for 1990/91 are not optimistic. It is expected that unemployment will reach a level of 2%. This is regarded as being very serious in a country where unemployment has been traditionally less than one percent.

GDP is expected to be \$CDN 5.3 billion, a slight increase over 1989 figures. Despite the devaluation of the Icelandic Krona, economic forecasts are rather pessimistic with lower export earnings being anticipated and higher inflation rates (above 20%) expected.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 EXPORT PROMOTION PRIORITIES

Mission: OSLO

Country: NORWAY

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

1. DEFENCE PROGRAMS, PRODUCTS, SERV

Norwegian commitment to defence spending despite cuts to other areas
Advanced technology products have high return for CDN exportes
Oil and Gas Equipment given positive attitude from CAN/Nor offshore
working group. Sales of DASH 8's in 1992. Continuing sales of
metals and minerals to Norway--a traditional export

2. ADVANCED TECH. PROD. & SERV

3. OIL & GAS EQUIPMENT, SERVICES

4. INDUSTRIAL MACHIN, PLANTS, SERV.

5. TRANSPORT SYS, EQUIP, COMP, SERV.

6. MINE, METAL, MINERAL PROD & SRV

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

1. MINE, METAL, MINERAL PROD & SRV
2. GRAINS AND OILSEEDS
3. DEFENCE PROGRAMS, PRODUCTS, SERV

4. OIL & GAS EQUIPMENT, SERVICES
- 5.
- 6.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: OSLO

Market: NORWAY

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	650.00 \$M	750.00 \$M	775.00 \$M	775.00 \$M
Canadian Exports	5.00 \$M	2.00 \$M	6.00 \$M	6.00 \$M
Canadian Share of Market	1.00 %	1.00 %	1.00 %	1.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	40.00 %
GERMANY WEST	30.00 %
SWEDEN	20.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. AMMUNITION AND EXPLOSIVES
2. AIR MAINTENANCE
3. TRAINING AIDS
4. PROTECTIVE EQUIPMENT
5. RADAR

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Provincial export promotion
- Competitive pricing
- Bilateral economic trade agreement

Factors for Canadian exports not reaching market potential:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: OSLO

Market: NORWAY

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

Activity: FOLLOW UP WITH CANADIAN DEFENCE MISSION 1989
Expected Results: CANADIAN FIRMS HAVEN'T BEEN AGGRESSIVE .

Activity: CONTINUING CALLS ON MATERIAL COMMANDS AND AGENTS
Expected Results: NEW REQUIREMENTS

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

Activity: Encourage firms to visit ARMEX
Expected Results: Increased awareness in Norway

Activity: Establish RDP as annual event
Expected Results: This must be regularized

Activity: Defence seminar for individual firms
Expected Results: Detailed knowledge of Cdn potential

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: OSLO

Market: NORWAY

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	870.00 \$M	825.00 \$M	830.00 \$M	840.00 \$M
Canadian Exports	7.00 \$M	7.00 \$M	7.00 \$M	8.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	0.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	31.00 %
UNITED KINGDOM	11.00 %
GERMANY WEST	10.00 %

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

Products/services for which there are good market prospects:

1. Customized software
2. Data communication
3. Peripherals of European standard

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Trade Fair activity
- Provincial export promotion
- Competitive pricing
- Strong sectoral capability in Canada
- Competitive Canadian financing
- Willingness of exporters to invest/joint venture in territory
- Success in Joint Venture
- ation a key for success
- since software customiz-

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: OSLO

Market: NORWAY

Factors for Canadian exports not reaching market potential:

- Market prospects have not been adequately explored

- _____

- _____

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

Activity: Follow up on Nordic Mission

Expected Results: Confirmation of agents appointed and contacts

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: OSLO

Market: NORWAY

Sector : OIL & GAS EQUIPMENT, SERVICES

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	2200.00 \$M	2500.00 \$M	2500.00 \$M	2500.00 \$M
Canadian Exports	4.50 \$M	4.00 \$M	4.00 \$M	29.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	0.00 %

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

Major Competing Countries

Market Share

UNITED KINGDOM	32.00 %
UNITED STATES OF AMERICA	16.00 %
FRANCE	12.00 %
NETHERLANDS	10.00 %

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

Products/services for which there are good market prospects:

1. Subsea technology
2. Production systems
3. Reservoir stimulation
4. Drilling equipment
5. Cold water technology
6. Environmental control systems
7. Downhole equipment
8. Instrumentation
9. Data logging
10. Safty systems

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: OSLO

Market: NORWAY

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- There is preference to Joint ventur
- e

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

Activity: Follow-up with Newfoundland on MOU
Expected Results: Broad the basis of co-operation and contacts

Activity: Calls to petroleum centers outside of Oslo
Expected Results: Finer definition of requirements

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

Activity: Canada-Norway Offshor Working Group

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: OSLO

Market: NORWAY

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

Activity: Mission to Maritime provinces

Expected Results: Joint venture

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: OSLO

Country: NORWAY

The mission reports that the approximate flows to all countries of investment from its country/territory in Canadian \$ is as follows: (including portfolio flows if a primary focus)

	Total (\$ Million)	Canadian Share	Major Competitor Share
Two years ago	1114.00	0.60	80.00
One year ago	1000.00	1.80	73.00
Current year	1100.00	2.00	80.00

The mission is of the opinion that Canada can reasonably expect to attract the following amount of foreign investment from its territory/country next year:

50 Million: with the completion of the Norsk Hydro Project mission will concentrate of first and second tier companies especially in the Autoparts sector. Should Hibernia come on line as a project the investment estimate would increase three to fourfold.

Canada's major competitors for investment from this territory/country are:

- United Kingdom
- Spain
- Sweden
- Belgium
- Switzerland

The following types of activities are currently being undertaken by Canada's major competitors to attract investment from this territory/country:

- Competition comes from EC countries where trade links are strongest. This is followed by EFTA countries where trade links are also strong. Exposure to these markets appears to be the major promotional tool coupled with specific missions sponsored by these countries

IDP Partners and related program activities:

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: OSLO

Country: NORWAY

IDP Partners and related activities cont d:

Export Council of Norway

- Seminar, ID assistance

Province of British Columbia

- Corporate liason and targetting of aquaculture industry

Province of Newfoundland

- Incoming mission to Newfoundland
Centered on oil and gas but also in fishing technology

Province of Quebec

- After success of Norsk Hydro investment major publicity
and follow-up

Canadian Banks

- Selected seminars and corporate referals from correspondent
banks.

Compared to major competitive destinations, Canada is perceive to have
the following advantages:

- North American market, lower costs, natural resource fit,
similar technologies

the following constraints:

- Lack of awareness of market potential and number of
prospects.

The mission indicates the following potential for various types
of investment from within its territory/country:

Type of Investment	Potential
Portfolio	LOW
Acquisition	MEDIUM
Greenfield	MEDIUM
Joint Venture	HIGH
Strategic Partnering	MEDIUM
Technology Licensing	MEDIUM

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: OSLO

Country: NORWAY

The mission believes that the following sectors are of greatest interest to investors in its territory/country an assigned ranking A = High B = Medium C = Low

Sector	Ranking
Agriculture/Food/Fish	A
Resource Processing	C
Machinery and Equipment	C
Transportation	C
Consumer Products	C
Commercial Service	C
Computer and Communications	B
Health Care Products/Medical	C
Aerospace and Defence	B
Strategic Technologies	B

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: OSLO

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

Seq #	Date
Type: SEMINAR, ABROAD	
2	09/90
Event Description: Seminar of joint ventures aimed at Fish Processing	
City : Reykjavik	
Country : ICELAND	
Investment Nature: Joint Venture	
Investment Sector: AGRICULTURE/FOOD/FISH	
Event Cooperants :	
Icelandic Chamber of Commerce	
Estimated Budget : \$2,000.00	
Type: ENTREPRENURIAL SEMINAR	
3	03/91
Event Description: Seminar	
Focus on Environmental technologies	
City : Oslo	
Country : NORWAY	
Investment Nature: Joint venture	
Greenfield	
Investment Sector: STRATEGIC TECHNOLOGIES	
Event Cooperants :	
Contact Canada	
Province of Ontario	
Estimated Budget : \$3,000.00	
Type: OUTCALL PROGRAM	
1	05/90
Event Description: Outcall program	
This sector requires direct contact	
City : Bergen, Stravenger	
Country : NORWAY	
Investment Nature: Joint Venture	
greenfield	
strategic partn	
Investment Sector: AGRICULTURE/FOOD/FISH	
Event Cooperants :	
Solo	
Estimated Budget : \$2,000.00	

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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: OSLO

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

Total estimated budget for all proposals: \$7,000.00

DEPARTMENT OF EXTERNAL AFFAIRS

PEMD - Proposed Government Promotional Activities 1990/91

Proposals As Of December 23/89

Post: Oslo

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Contact</u>
90/06/12	European Buyers To National Petroleum Show, Calgary, Alta Mission In, To Fair	Oil & Gas Equip.Services
90/08/00	Canada/Norway Offshore Working Group Mission Out, Industry	Oil & Gas Equip.Services
90/08/28	Offshore Northern Seas(Ons 90) Stavanger, Norway Fair, National Stand	Oil. & Gas Equip.Services G.Cote/B.Heslop

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: PARIS

Country: FRANCE

Le Produit Intérieur Brut de la France maintiendra en 1989 son allure de 1988 avec un taux de croissance de 3.5%; cette vigueur de l'économie, selon les prévisions du Ministère des Finances, devrait se retrouver au cours de l'année 1990 malgré un léger fléchissement du taux d'accroissement du P.I.B. à 3.0%. La cause principale de cette expansion continuera d'être la poussée des investissements, surtout industriels; ainsi l'investissement total des entreprises qui avait augmenté de 9.1% en 1988 et de 7.1% (prévision) en 1989, pourrait croître de 6.5% en 1990. Le taux élevé d'utilisation des capacités de production (90%) explique cette croissance soutenue de l'investissement. Les politiques de rigueur appliquées par les dirigeants du pays au cours des dernières années jointes à la modernisation de l'appareil productif portent donc leurs fruits: malgré certaines difficultés structurelles, l'économie française a le vent dans les voiles. Du côté négatif, il faut souligner l'emploi (2.5 millions de chômeurs pour un taux de chômage autour de 9.6%) et le solde des échanges commerciaux qui se situerait à la fin de 1989 à -40 millions. Pourtant les exportations augmentent plus vite que les importations (8.4% contre 7.1% en 1989) et une grande part du solde négatif peut s'expliquer paradoxalement par la bonne tenue générale de l'économie (augmentation de la consommation et de la demande de biens industriels étrangers). Quant aux prix, l'inflation devrait être contenue en 1990 à un taux inférieur à celui de 1989 (2.5% en 1990 contre 3.3% en 1989 en moyenne annuelle); il est à noter également l'écart d'inflation avec les principaux partenaires économiques de la France, et notamment avec la RFA, continue de se réduire.

Les échanges commerciaux entre la France et le Canada se sont fortement intensifiés en 1988: pour la première fois, le commerce bilatéral a totalisé plus de C 4.0 milliards (selon les statistiques des douanes françaises), la France devenant ainsi notre 5e partenaire commercial et également notre 5e fournisseur. Le Canada, pourtant, devra continuer ses efforts de promotion pour profiter de la croissance actuelle du marché français: en effet, notre part de ce marché est toujours inférieur à 1% et nous ne sommes qu'au 24e rang des fournisseurs étrangers de la France. A l'heure actuelle, nous pouvons observer (sur une base annuelle) une augmentation de 10% en 1989 de nos exportations (elles totalisent C 1.6 milliards en 1988) alors que nos importations semblent se maintenir au niveau de 1988 (C 2.4 milliards); avec la conséquence d'une légère baisse en 1989 du déficit de C 800 millions que nous avons enregistrés en 1988.

Même si les livraisons des Airbus à nos transporteurs aériens continueront au cours des prochaines années; (principale cause du gonflement de nos importations de la France quoiqu'il s'agisse d'un produit EUROPEEN) la participation accrue de nos sociétés à des grands projets aidera à rééquilibrer notre relation commerciale. Parmi ceux-ci, il convient de mentionner l'accord de coproduction entre Canadair et l'Aérospatiale pour des éléments du fuselage des nouveaux Airbus A-330 et A-340 et le succès remporté par Bombardier dans l'obtention du contrat des trains-navette de l'Euro-Tunnel.

Notre action devra donc continuer à cibler le développement des échanges par le biais de partenariats industriels et technologiques en France (et, par extension; en Europe) dans les secteurs prioritaires que

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: PARIS

Country: FRANCE

sont l'agro-alimentaire, les télé-communications, les bio-technologies, le transport et l'informatique. Nous surveillerons étroitement aussi les opportunités que s'offrent aux industries associées à la protection de l'environnement ainsi que dans le domaine des matériaux nouveaux: notre antenne commerciale à Lyon est a présent mandatée pour être le point focal des entreprises canadiennes désireuses d'explorer les possibilités de ce dernier secteur en France.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 EXPORT PROMOTION PRIORITIES

Mission: PARIS

Country: FRANCE

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

1. AGRI & FOOD PRODUCTS & SERVICE
Secteur à fort potentiel d'exportation; bonne réponse du marché.
Atout canadien dans produits spéciaux.
Secteur à forte concentration pour politique commerciale: problèmes d'accès; questions touchant pol. agr. française; questions sur blé, oléagineux, céréales, protéagineux.
2. ADVANCED TECH. PROD. & SERV
Potentiel accru en raison de dérèglementation et de l'échéance du Marché Unique (1992).
Reconnaissance par marché d'avance technologie canadienne (PABX - Cablo-distribution).
3. DEFENCE PROGRAMS, PRODUCTS, SERV
Sérieux des firmes canadiennes en matière de défense et sécurité.
Potentiel énorme en coop. ind. si grands projets aboutissant (ex: sous-marins);
Intérêt des firmes françaises à coopérer.
4. ADVANCED TECH. PROD. & SERV
Marché en pleine croissance et ouvert; succès remportés par sociétés canadiennes dans domaine des logiciels. Souplesse d'adaptation aux exigences du marché français.
5. ADVANCED TECH. PROD. & SERV
Secteur très porteur en France et qui se prête bien à nos objectifs de recherche de partenaires technologiques.
6. AGRI & FOOD PRODUCTS & SERVICE
Sociétés de distribution françaises (grandes surfaces; centrales d'achats) offrent débouchés intéressants pour nos biens de consommation (Food et non-food); bonne réaction du marché.

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

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

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: PARIS

Market: FRANCE

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: ANIMAL,POULTRY BREEDING STOCK

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	687.40 \$M	624.70 \$M	650.00 \$M	650.00 \$M
Canadian Exports	3.60 \$M	4.50 \$M	5.00 \$M	5.50 \$M
Canadian Share of Market	0.53 %	0.72 %	0.77 %	0.85 %

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

Major Competing Countries

Market Share

BELGIUM	32.10 %
NETHERLANDS	24.10 %
UNITED KINGDOM	16.00 %
GERMANY WEST	8.40 %
UNITED STATES OF AMERICA	4.90 %
POLAND	3.70 %

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

Products/services for which there are good market prospects:

1. Semence bovine (2.00).
2. Bovins reproducteurs (.84).
3. Bisons (.00).
4. Veaux d'engraissement (.11).
5. Embryons bovins (.12)
6. Chevaux (.35)
7. Chèvres Angora (.28)
8. Verres de terre (.29)
9. Poussins (.22)
10. Dindonneaux (.06)
11. Embryons chèvres (.00)
12. Porcins reproducteurs (.00)

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PARIS

Market: FRANCE

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- Qualite et salubrite
- canadien.
- superieures du troupeau

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Market prospects have not been adequately explored
- Accords sanitaire et de l'Environ-
- nement recus qu'a l'automne 1989.

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

Activity: S'occuper sans cesse des problèmes d'accès et des barrières non-tarifaires.

Expected Results: Protéger les débouchés présents et en ouvrir d'autres.

Activity: Mise à jour continuelle des listes d'importateurs.

Expected Results: Meilleur ciblage des contacts prioritaires.

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

Activity: Salon International de l'Agriculture (mars 1990)

Expected Results: Augment'n de la valeur et de la gamme de produits exportés.

Activity: Salon International de d'Agriculture (mars 1991).

Expected Results: Aggrandissement du Pavillon Natl. Expo. de bisons, veaux, génis.

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PARIS

Market: FRANCE

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

Activity: Séminaires sur la production de bisons au Canada.
Expected Results: Augmentation de la demande pour des reproducteurs canadiens.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: PARIS

Market: FRANCE

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: SEEDS & SPECIAL CROPS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1467.80 \$M	1484.80 \$M	1450.00 \$M	1450.00 \$M
Canadian Exports	15.40 \$M	15.70 \$M	15.50 \$M	15.50 \$M
Canadian Share of Market	1.05 %	1.06 %	1.07 %	1.07 %

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

Major Competing Countries

Market Share

NETHERLANDS	38.20 %
GERMANY WEST	19.10 %
BELGIUM	10.50 %
UNITED STATES OF AMERICA	3.70 %
UNITED KINGDOM	2.20 %
DENMARK	1.70 %

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

Products/services for which there are good market prospects:

1. Soja de semence (3.9)
2. Lentilles (5.1)
3. Maïs de semence (1.8)
4. Trèfle de semence (.4)
5. Fléole de semence (.3)
6. Pois de semence (.1)
7. Lin de semence (.6)
8. Haricots écosses (1.6)
9. Tabacs (.4)
10. Pois écossés (.5)

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- Investissement francais

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PARIS

Market: FRANCE

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
-

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

Activity: Mise à jour continuelle des listes d'importateurs potentiels
Expected Results: Meilleur ciblage des contacts.

Activity: S'occuper des problèmes d'accès et des barrières non-tarifaires.
Expected Results: Protéger les débouchés présents et en ouvrir d'autres.

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

Activity: Troisième consultation à haut niveau des Agents s'occupant des relations phytosanitaires.
Expected Results: Meilleure gestion des problèmes.

Activity: Appui aux négociations sur les semences de soja pour 1990/1991.
Expected Results: Maintien du marché en face de contraintes phytosanitaires.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: PARIS

Market: FRANCE

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: MEATS & MEAT BY-PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	3722.30 \$M	3795.70 \$M	4000.00 \$M	3900.00 \$M
Canadian Exports	31.40 \$M	32.80 \$M	32.00 \$M	32.00 \$M
Canadian Share of Market	0.84 %	0.86 %	0.80 %	0.82 %

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

Major Competing Countries

Market Share

NETHERLANDS	17.40 %
BELGIUM	16.90 %
UNITED KINGDOM	15.20 %
GERMANY WEST	13.90 %
IRELAND	7.80 %
DENMARK	7.00 %

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

Products/services for which there are good market prospects:

1. Viande chevaline (29.54)
2. Abats bovins (1.84)
3. Abats porcins (1.12)
4. Viande de bison (.00)
5. Abats chevalins (.19)
6. Foies de volaille (.04)
7. Viande marinée (.04)
8. Viande d'oie (.00)

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- Competitive pricing
- Strong sectoral capability in Canada
- Societe francaise a

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PARIS

Market: FRANCE

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
 - Import duties are high
 - Restrictive standards
 - Lack of promotion and advertising
 - Limited Canadian capabilities
 - Market prospects have not been adequately explored
 - Taux de douanes elevee.
-

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

Activity: Mise à jour continuelle des listes d'importateurs potentiels
Expected Results: Meilleur ciblage de nos contacts prioritaires.

Activity: S'occuper des problèmes d'accès et barrières non-tarifaires.
Expected Results: Protéger les débouchés présents et en ouvrir d'autres.

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

Activity: Visite au Canada d'une mission de vétérinaires s'occupant de l'Hygiène sanitaire.
Expected Results: Faciliter la résolution des problèmes du commerce futur

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: PARIS

Market: FRANCE

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: SEMI & PROCESSED FOOD & DRINK

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	3714.10 \$M	3329.50 \$M	3495.00 \$M	3670.00 \$M
Canadian Exports	13.70 \$M	13.80 \$M	14.40 \$M	15.20 \$M
Canadian Share of Market	0.37 %	0.41 %	0.41 %	0.41 %

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

Major Competing Countries

Market Share

NETHERLANDS	9.50 %
SPAIN	8.70 %
BELGIUM	8.50 %
ITALY	8.10 %
GERMANY WEST	8.10 %
UNITED KINGDOM	4.60 %

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

Products/services for which there are good market prospects:

1. Myrtilles congelées
2. Miel
3. Whisky
4. Framboises congelées
5. Biscuits divers
6. Sirop d'érable
7. Champignons séchés
8. Farine de moutarde
9. Conserves de légumes
10. Vins

Factors contributing to current successful Canadian exports:

- Import duties are moderate
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Canada is one of few sources of supply
- Strong sectoral capability in Canada

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PARIS

Market: FRANCE

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
 - Non-competitive pricing
 - Lack of promotion and advertising
 - Unsuitable product
 - Sur quelques produits spécifiques.
-

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

Activity: Remise à jour de nos listes d'importateurs potentiels par contact direct.

Expected Results: Mieux connaître le marché et ses perspectives de dvlpmt.

Activity: S'occuper des problèmes d'accès et des barrières douanières non tarifaires.

Expected Results: Souligner les excès, obtenir des compensations ou modifica'n

Activity: Remise à jour des listes d'exportateurs canadiens.

Expected Results: Permettre un meilleur contact. Augmenter le nombre d'imprtrs.

Activity: Etude de marché du miel, des fruits congelés, du riz sauvage

Expected Results: Diminuer les intermed., protéger les débouchés existants

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

Activity: Mission d'acheteurs au Canada de "spécialités gourmandes".

Expected Results: Meilleur connaissance de ces prods par les acheteurs franc.

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: PARIS

Market: FRANCE

Sector : FISHERIES, SEA PRODUCTS & SERV.

Sub-Sector: FISH & SHELLFISH & OTHER PROD

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	2662.30 \$M	2738.00 \$M	2800.00 \$M	2940.00 \$M
Canadian Exports	109.30 \$M	99.40 \$M	100.80 \$M	105.80 \$M
Canadian Share of Market	4.10 %	3.60 %	3.60 %	3.60 %

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

Major Competing Countries	Market Share
UNITED KINGDOM	11.10 %
NORWAY	10.60 %
DENMARK	8.00 %
SENEGAL	5.90 %
NETHERLANDS	5.20 %
UNITED STATES OF AMERICA	4.30 %

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

Products/services for which there are good market prospects:

1. Homard vivant
2. Brochets congelés
3. Autres poissons d'eau douce
4. Crabe congelé
5. Saumon congelé
6. Homard congelé
7. Crevettes congelées
8. Surimi
9. Lotte congelée
10. Raie congelée
11. Cabillaud congelé
12. Morue salée

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PARIS

Market: FRANCE

Factors contributing to current successful Canadian exports:

- Import duties are moderate
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Canada is one of few sources of supply
- Strong sectoral capability in Canada

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Restrictive standards
- Lack of promotion and advertising
- Unsuitable product
- Market prospects have not been adequately explored
- _____
- _____

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

Activity: Remise à jour de nos listes d'importateurs grâce à un contact direct.

Expected Results: Meilleure connaissance du marché et informations précises.

Activity: S'occuper des problèmes d'accès et des barrières douanières non tarifaires.

Expected Results: Obtenir des éclaircissements, des rectificatifs/compensation

Activity: Etudes sectorielles a réaliser: produits élaborés, surimi, poissons, homard, crabe, saumon.

Activity: Remise à jour de nos listes d'exportateurs.

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PARIS

Market: FRANCE

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

Activity: Dégustation de homards à l'Ambassade.

Expected Results: Meilleure connaissance des prods cdns, surtout homard cong.

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: PARIS

Market: FRANCE

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	264.00 \$M	310.00 \$M	450.00 \$M	500.00 \$M
Canadian Exports	10.10 \$M	12.00 \$M	15.00 \$M	35.00 \$M
Canadian Share of Market	3.80 %	3.90 %	3.30 %	7.30 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	40.00 %
GERMANY WEST	20.00 %
UNITED KINGDOM	20.00 %
JAPAN	10.00 %
ITALY	5.00 %

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

Products/services for which there are good market prospects:

1. Drone CL-289
2. Canadair CL-215 T
3. Conair F27-Tracker
4. Eryx

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Fairs and Missions support
- Trade Fair activity
- Canada is one of few sources of supply
- Willingness of exporters to invest/joint venture in territory

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PARIS

Market: FRANCE

Factors for Canadian exports not reaching market potential:

- Unsuitable product
- Non-competitive financing
- Limited Canadian capabilities

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

- Activity: Suivi et soutien à Canadair pour projets: CL 215 T; CL 289; CL 227.
 Expected Results: Vente sur pays tiers CANADAIR Aerospatiale pour CL 289.
- Activity: Soutien à CONAIR avec Sécurité Civile pour: -achats nouveaux F27; -remotorisation Trackers; -modifica'ns helcop.-bomb.eau
 Expected Results: Vente au moins d'un F27.Assist. tech. incluant remotor.en JV

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

- Activity: Mission Défense canadienne en France (février 1990)
 Expected Results: Accroissement ventes- accords JV - échanges technologiques
- Activity: Mission française sous-traitants aéronautiques (mai 1990)
 Expected Results: idem, plus potentiel investissement au Canada.

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

- Activity: Recherche ententes commerciales - JV pour sociétés canadiennes très ciblées dans secteur aéronautique, défense:
 Expected Results: Transfert de tech./possibilité export sur pays tiers.
- Activity: Projet ERYX:sous-traitance éléments électroniques missile anti-char.
 Expected Results: Acquisition technologique nouvelle et exportations.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: PARIS

Market: FRANCE

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: TELECOM, DATACOM, SAT, SPACECOM

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	218.00 \$M	325.00 \$M	486.00 \$M	735.00 \$M
Canadian Exports	1.60 \$M	2.50 \$M	3.80 \$M	5.80 \$M
Canadian Share of Market	0.70 %	0.80 %	0.80 %	0.80 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	23.00 %
ITALY	19.00 %
UNITED STATES OF AMERICA	28.00 %
JAPAN	66.00 %
JAPAN	82.00 %
SWEDEN	13.00 %

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

Products/services for which there are good market prospects:

1. Parties, appareils Télécoms.
2. Modems
3. Autres appareils Télécoms
4. Appareils Electriques, Télégraphie
5. Parties Electriques, Télégraphie
6. Parties Electriques, Télégraphie
7. Autres appareils Electriques, Téléphonie
8. Appareils commutation
9. Postes Téléphoniques

Factors contributing to current successful Canadian exports:

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PARIS

Market: FRANCE

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Restrictive quotas
- Restrictive standards
- Lack of promotion and advertising
- Unsuitable product
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored
- Performance of local agent or representative
- _____
- _____

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

Activity: Rapportage sur (a) télécoms (survol)
Expected Results: A) meilleure info sur secteur en évolution.

Activity: (b) cablodistribution
Expected Results: B) conseil pour socs canadiennes

Activity: c) Normes françaises; d) processus d'exportation française
Expected Results: c) & d) questions d'accès.

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: PARIS

Market: FRANCE

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: COMPUTERS HARD/SOFTWARE & COMP

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	5422.00 \$M	5788.00 \$M	6107.00 \$M	0.00 \$M
Canadian Exports	20.00 \$M	23.00 \$M	24.20 \$M	0.00 \$M
Canadian Share of Market	0.40 %	0.40 %	0.40 %	0.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	34.00 %
JAPAN	15.00 %
GERMANY WEST	11.50 %
UNITED KINGDOM	9.50 %
ITALY	6.50 %
TAIWAN	5.00 %

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

Products/services for which there are good market prospects:

1. Logiciels, applications spécialisées.
2. Logiciels PC et progiciels appliqués.
3. Réseaux locaux
4. Systèmes de transmission de données
5. Périphériques spécialisés
6. Unité de traitement numérique à 1 ou 2 commandes
7. Unités d'entrée et de sortie avec mémoire.
8. Unités de mémoire présentées avec le système.

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Competitive pricing

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PARIS

Market: FRANCE

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Unsuitable product
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored
- _____
- _____

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

Activity: Participation à INFORA sous forme de stand d'information.
Expected Results: Faire mieux connaître nos possibilités.

Activity: Missions Logiciels en France, Fev. 91.
Expected Results: Augmenter présence produits canadiens sur le marché.

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

Activity: Mission d'acheteurs à organiser au Canada.
Expected Results: Augmenter nos ventes aussi bien dans le soft que le hard.

Activity: "Matching" de nos forces avec les faiblesse françaises
Expected Results: Augmenter nos ventes aussi bien dans le soft que le hard.

Activity: Mailing auprès de SSII de notre disquette CANTER
Expected Results: Augmenter nos ventes aussi bien dans le soft que le hard.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: PARIS

Market: FRANCE

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: INSTRUMENT & PROCESS CONTROLS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	6630.00 \$M	7875.00 \$M	8600.00 \$M	0.00 \$M
Canadian Exports	67.40 \$M	81.00 \$M	85.00 \$M	0.00 \$M
Canadian Share of Market	0.90 %	1.01 %	1.00 %	0.00 %

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

Major Competing Countries

Market Share

GERMANY WEST	6.50 %
UNITED STATES OF AMERICA	2.50 %
JAPAN	2.40 %
ITALY	2.50 %
UNITED KINGDOM	1.40 %
BELGIUM	1.60 %

Current Status of Canadian

exports in this sector/subsector: Mature with little growth

Products/services for which there are good market prospects:

1. Dispositifs semi-conducteurs
2. Circuits imprimés rigides
3. Appareils électriques ou à laser à sonder.
4. Photodiodes
5. Pièces, machine-outils électromécaniques
6. Tubes pour hyperfréquences.

Factors contributing to current successful Canadian exports:

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PARIS

Market: FRANCE

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- Performance of local agent or representative
- _____
- _____

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

Activity: Poursuite de l'appui aux soumissionnaires canadiens d'appels d'offres.

Expected Results: Meilleures appréciation des possibilités réelles d'intégration

Activity: Actions marketing, mailing; lors de salons avec importateurs

Expected Results: Amélioration de la connaissance de l'offre canadienne/savoir-faire.

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

Activity: Etude sectorielle portant sur l'impact dans la distribution des composants électroniques du marché unique de 93.

Expected Results: Accords commerciaux, représentation.

Activity: Proposition de mission d'acheteurs au Canada.

Expected Results: Accords commerciaux, représentation.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: PARIS

Market: FRANCE

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	2595.00 \$M	2984.00 \$M	3640.00 \$M	0.00 \$M
Canadian Exports	15.40 \$M	21.70 \$M	24.70 \$M	0.00 \$M
Canadian Share of Market	0.60 %	0.70 %	0.67 %	0.00 %

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

Major Competing Countries

Market Share

GERMANY WEST	35.00 %
SPAIN	15.00 %
ITALY	14.00 %
BELGIUM	9.00 %
JAPAN	7.00 %
UNITED KINGDOM	6.00 %

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

Products/services for which there are good market prospects:

1. Véhicules lourds pour transports hors-route.
2. Pièces et accessoires auto. pour transports march.
3. Syst. électroniques de climatisation auto.

Factors contributing to current successful Canadian exports:

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PARIS

Market: FRANCE

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Unsuitable product
- Limited appreciation/understanding of distribution system
- _____
- _____

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

Activity: SALON EQUIP 'AUTO 89: Stand d'information et Mission NEXOS
Expected Results: Accords commerciaux et représentation

Activity: Mission acheteurs matériel de sécurité (Est-Canada) et Salon "Security", Toronto.
Expected Results: Identifi'n produits inovants et accords de partenariat.

Activity: Participation à "MARKETPLACE 89" (Ouest-Canada)
Expected Results: Promotion des exportations canadiennes adaptées aux données

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

Activity: Organisation de rencontres et contacts d'industriels dans secteurs CAO: Composants électr., instrumentation.
Expected Results: Dégager les conditions d'une meilleure accept'n offre cdnne

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: PARIS

Market: FRANCE

Sector : FOREST PRODUCTS, EQUIP, SERVICES

Sub-Sector: WOOD AND WOOD PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	2047.00 \$M	2178.00 \$M	2100.00 \$M	2300.00 \$M
Canadian Exports	70.00 \$M	87.00 \$M	80.00 \$M	100.00 \$M
Canadian Share of Market	3.40 %	4.00 %	3.80 %	4.30 %

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

Major Competing Countries

Market Share

GERMANY WEST	11.30 %
BELGIUM	9.90 %
FINLAND	9.80 %
INDONESIA	5.50 %
SWEDEN	5.50 %
UNION OF SOVIET SOC REP	4.80 %

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

Products/services for which there are good market prospects:

1. Bois d'oeuvre résineux
2. Bois ouvres
3. Menuiseries
4. Contreplaque
5. Panneaux

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Fairs and Missions support
- Trade Fair activity
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PARIS

Market: FRANCE

Factors for Canadian exports not reaching market potential:

- Performance of local agent or representative
- Baisse estimee pour annee en cours
- due a baisse de prod'n au Cda

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

Activity: Promotion de l'utilisation des produits canadiens dans la construction. Encourager missions au Canada.

Expected Results: Développer demande des utilisateurs.

Activity: Participation a séminaires sectoriels.

Expected Results: Développer demande des utilisateurs.

Activity: Surveiller problèmes d'accès, barrières non-tarifaires.

Expected Results: Faciliter exportations.

Activity: Surveiller mise en place de harmonisation des codes et normes en vue de 1992.

Expected Results: Maintenir haut volume de marché.

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

Activity: Développer nouveaux contacts français pour produits manufactures.

Expected Results: Trouver nouveaux débouchés.

Activity: Développer nouveaux contacts pour composants en bois.

Expected Results: Trouver nouveaux débouchés.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: PARIS

Market: FRANCE

Sector : MINE,METAL,MINERAL PROD & SRV

Sub-Sector: MINERALS AND MINERAL PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1704.00 \$M	1690.00 \$M	1750.00 \$M	1840.00 \$M
Canadian Exports	259.00 \$M	330.00 \$M	315.00 \$M	330.00 \$M
Canadian Share of Market	15.20 %	19.50 %	18.00 %	18.00 %

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

Major Competing Countries

Market Share

BRAZIL	27.00 %
SWEDEN	18.00 %
UNITED STATES OF AMERICA	44.00 %
UNITED STATES OF AMERICA	55.00 %
POLAND	45.00 %
NORWAY	12.00 %

Current Status of Canadian

exports in this sector/subsector: Mature with little growth

Products/services for which there are good market prospects:

1. Minerais de fer non-agglomère
2. Zinc
3. Houille à Coke
4. Molybdène
5. Soufre
6. Titane
7. Scories de Titane
8. Amiante
9. Plomb
10. Nickel
11. Aluminium
12. Sélérium

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PARIS

Market: FRANCE

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Limited Canadian capabilities
- Market prospects have not been adequately explored
- _____
- _____

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

Activity: Reportage sur (a) charbon

Activity: Reportage sur (b) titane

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

Activity: Reportage sur (a) amiante (rapport annuel).

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: PARIS

Market: FRANCE

Sector : CHEM PROD & PETROCHEM, EQP, SERV

Sub-Sector: CHEM & PETROCHEM PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	20293.00 \$M	22452.00 \$M	24257.00 \$M	0.00 \$M
Canadian Exports	79.50 \$M	82.30 \$M	65.40 \$M	0.00 \$M
Canadian Share of Market	0.39 %	0.36 %	0.27 %	0.00 %

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

Major Competing Countries	Market Share
GERMANY WEST	24.30 %
BELGIUM	13.20 %
NETHERLANDS	11.50 %
UNITED KINGDOM	11.40 %
UNITED STATES OF AMERICA	8.90 %
ITALY	6.60 %

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

Products/services for which there are good market prospects:

1. Chlorure de Potassium (51)
2. Uranium naturel, composés et alliages (36)
3. Styènes (18.9)
4. Produits pharmaceutiques (8.2)
5. Éléments radioactifs, isotopes, composés/alliages
6. Composés hétérocycliques (4.6)
7. Méthanol (3.6)

Factors contributing to current successful Canadian exports:

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PARIS

Market: FRANCE

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Limited Canadian capabilities
- _____
- _____

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

Activity: POLLUTEC - Lyon 20-23/11/90 Environnement
Expected Results: Renforcer présence industrielle canadienne.

Activity: (non-approuvé) Mission "NEXOS" à MOLD-EXPO Nov. 90
Expected Results: Faire mieux connaître potentiel partenariat et coop avec ind

Activity: (non-approuvé) Mission française au Cda de mouleurs & éqptrs
(Plastiques) Qué et Ont.
Expected Results: Juin 90 - Renforcer transferts tech./coop'n ind.

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

Activity: Rencontrer les principaux distributeurs/importateurs de
produits chimiques afin de connaître leurs besoins.
Expected Results: Augmentation de nos exportations.

Activity: Mission Ontarienne en Rhones-Alpes - secteur Environnement
Expected Results: Renforcer accord de coop. ind. & écon. entre Rhones-A./Ont.

Activity: Entreprendre une étude sur la législation européenne de
l'AMM en produits pharmaceutiques.
Expected Results: Augmentation de nos exportations.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: PARIS

Market: FRANCE

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	2451.00 \$M	60900.00 \$M	70000.00 \$M	75000.00 \$M
Canadian Exports	9.40 \$M	35.00 \$M	45.00 \$M	50.00 \$M
Canadian Share of Market	0.40 %	0.57 %	0.64 %	0.66 %

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

Major Competing Countries	Market Share
GERMANY WEST	19.00 %
ITALY	11.00 %
BELGIUM	9.00 %
UNITED KINGDOM	7.30 %
UNITED STATES OF AMERICA	7.00 %
NETHERLANDS	5.30 %

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

Products/services for which there are good market prospects:

1. Quincaillerie
2. Articles de sport
3. Accessoires piscines
4. Bateaux

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Trade Fair activity

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PARIS

Market: FRANCE

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Unsuitable product
- Limited appreciation/understanding of distribution system
- Limited Canadian capabilities
- Manque de reponse aux lettres,
- telex, fax, etc.

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

Activity: SIG Grenoble
Expected Results: Accroissement des ventes.

Activity: Salon de la Franchise
Expected Results: Développement du nombre de franchises en France.

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

Activity: Développer le marché de l'accastillage et du matériel de pêche.
Expected Results: Accroissement des ventes.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: PARIS

Market: FRANCE

Sector : EDUCATION, MEDICAL, HEALTH PROD

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

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1408.00 \$M	1592.00 \$M	1733.00 \$M	0.00 \$M
Canadian Exports	7.04 \$M	8.60 \$M	9.30 \$M	0.00 \$M
Canadian Share of Market	0.50 %	0.54 %	0.53 %	0.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	27.30 %
GERMANY WEST	23.20 %
JAPAN	10.60 %
UNITED KINGDOM	5.80 %
BELGIUM	5.70 %
ITALY	5.50 %

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

Products/services for which there are good market prospects:

1. Appareils de prothèse 3.8
2. Appareils et instruments médicaux .96
3. Rayons X: appareils, tubes et accessoires .77
4. Appareils d'audition .58
5. Appareils de massage .52
6. Catheters, canules et instruments .46
7. Appareils dentaires .27
8. Appareils d'ophtalmologie .21

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Fairs and Missions support

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PARIS

Market: FRANCE

Factors for Canadian exports not reaching market potential:

- Limited Canadian capabilities

- _____

- _____

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

Activity: Intermédica

Expected Results: Meilleure visibilité des produits canadiens.

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

Activity: Rencontrer les sociétés fabricantes en France dans le but de les amener à fabriquer sous licence au Canada.

Expected Results: Substituer les importations par une fabrication locales.

Activity: Rencontre avec les principaux distributeurs.

Expected Results: Augmenter nos exportations.

Activity: Mission Ontarienne en Bio-Technologie en Region Rhones/Alpes

Expected Results: Renforcer accord de coop. ind. et écon. entre Rhone-A./Ont.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: PARIS

Market: FRANCE

Sector : INDUSTRIAL MACHIN, PLANTS, SERV.

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	13090.00 \$M	20895.00 \$M	23400.00 \$M	0.00 \$M
Canadian Exports	129.20 \$M	207.00 \$M	231.00 \$M	0.00 \$M
Canadian Share of Market	0.99 %	0.99 %	0.10 %	0.00 %

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

Major Competing Countries

Market Share

GERMANY WEST	26.00 %
ITALY	13.00 %
UNITED KINGDOM	7.00 %
JAPAN	6.50 %
BELGIUM	5.60 %
SWEDEN	3.00 %

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

Products/services for which there are good market prospects:

1. Appareils pour liquéfaction d'air
2. Pelleteuses, ramasseuses
3. Détendeurs
4. Matériel d'extraction
5. Pièces détachées, machines outils
6. Machines, appareils sur chenilles
7. Pièces machines de sondage, et de forage

Factors contributing to current successful Canadian exports:

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PARIS

Market: FRANCE

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored
- Performance of local agent or representative

-

-

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

Activity: Etude sectorielle permettant suivi de regroupements/identi'n des poles technologiques en automatismes, productivité.

Expected Results: Identification des opps donnant lieu à accord partenariat.

Activity: Coopération avec délégué en transferts de technologie (TDO) lors missions de consultants du secteur.

Expected Results: Approche directe des sociétés performantes du secteur.

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

Activity: Encouragement de visite d'exportateurs sur le programme PDME.

Expected Results: Renforcement dispositions cdnnes/suivi des accords établis

Activity: Mission de l'Ontario en région Rhone-Alpes-Productique.

Expected Results: Renforcer accord de coop'n ind'le et econ. entre région

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: PARIS

Country: FRANCE

The mission reports that the approximate flows to all countries of investment from its country/territory in Canadian \$ is as follows: (including portfolio flows if a primary focus)

	Total (\$ Million)	Canadian Share	Major Competitor Share
Two years ago	11426.00	2.20	69.50
One year ago	0.00	0.00	0.00
Current year	0.00	0.00	0.00

The mission is of the opinion that Canada can reasonably expect to attract the following amount of foreign investment from its territory/country next year:

En '88, l'augmentation des investissements français au Cda s'est située autour de 36% pr atteindre environ 335M\$ (chiffres non confirmés). Compte tenu du positionnement des entreprises face à la globalisation des marchés, des alliances qui en découlent et des effets de l'ALE, ns croyons qu'en '89 cette

Canada's major competitors for investment from this territory/country are:

- Etats-Unis 24.3%
- Suisse 11.2%
- Pays-Bas 10.1%
- Royaume-Uni 8.1%
- U.E.B.L. (Belgique) 8%
- Espagne 7.8%

The following types of activities are currently being undertaken by Canada's major competitors to attract investment from this territory/country:

- Representation auprès de l'entreprise et groupes consulaires
Promotion (organisation de journées d'information, colloque)
Missions de coopération industrielle.
Jumelage (régions, municipalités). Parti'n à des colloques,
expo....Publicité via mailings....

IDP Partners and related program activities:

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: PARIS

Country: FRANCE

IDP Partners and related activities cont d:

Investissement Canada

- Documentation/statistiques/études marché/suivi dossiers

ISTC

- Profils sectoriels/support technique/suivi dossiers/
séminaires secteur aéronautique.

Ambassade (Agents sectoriels/transfert technologie)

- Connaissance sectorielle/contacts/dossiers

Commissaires Industriels Canadiens

- Activités de promotion/prospection ciblée/suivi dossiers/
recherches de partenaires.

Provinces Canadiennes

- Documentation/prospection ciblée/suivi dossiers

Secteur privé Canadien (service) en France

- Support technique/suivi dossiers

Chambres de Commerce et d'Industrie

- Activités de promotion/ciblage d'entreprises

Secteur privé français (service)

- Organisation séminaires/ciblage entreprises

Associations professionnelles

- Liste membres/participation à activités de promotion

Conseils régionaux et généraux

- Ciblage d'entreprises/financement études de faisabilité/
activités de promotion

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: PARIS

Country: FRANCE

Compared to major competitive destinations, Canada is perceived to have the following advantages:

- Base de développement du Marché Nord-américain en vertu de l'ALE.
- Taux de productivité meilleur/plus bas coûts de production dans l'ensemble.
- Tolérance des Canadiens face aux étrangers; mentalité plus compatible des Canadiens.
- Coûts d'implantation moins élevés par rapport aux Etats-Unis
- Stabilité politique/conditions économiques. Qualité de la vie.

the following constraints:

- Positionnement des entreprises sur marché européen dans cadre Europe 1992.
- Attrait du grand marché des Etats-Unis (Great American dream).
- Taille du marché canadien
- Méconnaissance du dynamisme canadien des affaires.
- Historique d'entreprises ayant échoué

The mission indicates the following potential for various types of investment from within its territory/country:

Type of Investment	Potential
Portfolio	MEDIUM
Acquisition	HIGH
Greenfield	MEDIUM
Joint Venture	HIGH
Strategic Partnering	MEDIUM
Technology Licensing	HIGH

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: PARIS

Country: FRANCE

The mission believes that the following sectors are of greatest interest to investors in its territory/country an assigned ranking A = High B = Medium C = Low

Sector	Ranking
Agriculture/Food/Fish	A
Resource Processing	C
Machinery and Equipment	B
Transportation	A
Consumer Products	B
Commercial Service	C
Computer and Communications	B
Health Care Products/Medical	A
Aerospace and Defence	A
Strategic Technologies	B

DEPARTMENT OF EXTERNAL AFFAIRS

PEMD - Proposed Government Promotional Activities 1990/91

Proposals As Of December 23/89

Post: Paris

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Contact</u>
90/05/00	Buyers From France - Seafoods And Ocean Products Mission In, To Industry	Fisheries, Sea Products & Services
90/05/00	Defence Industrial Co-op Mission From France Mission In, Industry	Defence Programs, Products & Services
90/05/28	Intermedica Paris, France Info Booth, Only	Education, Medical, Health Products
90/10/22	Sial - Int'l Food Fair, Parts France Fair, National Stand	Agri & Food Products & Services Guy Cote
90/11/00	Télécom '90 Paris, France Info Booth, Only	Advanced Tech. Products & Services
91/02/00	Software Mission To France Mission Out, Industry	Advanced Tech. Products & Services
91/03/00	Sia - Int'l. Agricultural Fair, Paris, France Info Booth, With Group	Agri & Food Products & Services
91/03/00	Sig 91 Grenoble, France Fair, National Stand	Consumer Products

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: ROME

Country: ITALY

ITALY

The Italian economy, with a growth rate forecast of more than 3.2 percent in 1990, should remain amongst the strongest and most dynamic of Europe in the coming year. While prices are expected to remain relatively high, inflation seems to be under control; latest government forecast predicts a rate of less than 5 percent in 1990. Italy's number one economic problem will therefore continue to be its public deficit which the new Andreotti government seems determined to bring under control. While tax increases and spending cuts recently introduced are likely to lead to slower growth in internal demand (+3.2 percent), imports are expected to continue to grow (+6 percent) faster than exports (+5.8 percent). Prospects for Canadian exports in 1990 remain excellent. Canadian industry should continue to be well positioned to take advantage of the trade and industrial cooperation opportunities which have been identified under the Economic and Industrial Cooperation Agreement signed by Canada and Italy in 1988. Greater interest by Italian investors to consider opportunities abroad should also arise from the further liberalization of capital movements which is expected to be completed in 1990.

MALTA

As the country continues to develop an economic infrastructure that is consistent with its closer economic and commercial ties with Western Europe, there will be opportunities for Canadian exporters in a number of fields, including power generation, telecommunications and possibly financial services.

LIBYA

Our activities with respect to Libya will continue to be limited to the provision of available market intelligence on a responsive basis.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 EXPORT PROMOTION PRIORITIES

Mission: ROME

Country: ITALY

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

1. AGRI & FOOD PRODUCTS & SERVICE

High EC agricultural support subsidies and harmonization of EC plant health and veterinary regulations tend to restrict market access, necessitating constant liaison with and representations to Italian authorities as well as promotional efforts to maintain and increase traditional and new niche markets.

2. ADVANCED TECH. PROD. & SERV

Italian market is developing for telecom, satellite/space systems, environmental and other specialized electronic equipment, producing significant opportunities for industrial coop, technology transfers and export sales. Sector also important in context of EC 1992 market integration.

3. DEFENCE PROGRAMS, PRODUCTS, SERV

Reactivated RDP Committee, combined with recent Italian defence contracts in Canada, are providing an impetus to defence trade between the two countries and particularly for Canadian firms seeking opportunities in Italy.

4. FISHERIES, SEA PRODUCTS & SERV.

Italian fish market is opening up to non-Mediterranean species and Canadian exporters have begun to exploit new opportunities. Further market development will require promotional efforts and government representations to improve market access.

5. TRANSPORT SYS, EQUIP, COMP, SERV.

Major market for aircraft (CL-215, Challenger, Dash-8), aircraft engines and parts, requiring sustained market intelligence gathering and liaison with and representations to Italian government authorities

6.

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

1. FOREST PRODUCTS, EQUIP, SERVICES
2. MINE, METAL, MINERAL PROD & SRV
3. GRAINS AND OILSEEDS

4. TRANSPORT SYS, EQUIP, COMP, SERV.
- 5.
- 6.

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: ROME

Country: ITALY

The mission reports that the approximate flows to all countries of investment from its country/territory in Canadian \$ is as follows: (including portfolio flows if a primary focus)

	Total (\$ Million)	Canadian Share	Major Competitor Share
Two years ago	15512.00	0.00	0.00
One year ago	28347.00	0.00	0.00
Current year	30000.00	0.00	0.00

The mission is of the opinion that Canada can reasonably expect to attract the following amount of foreign investment from its territory/country next year:

Post is currently handling several investment files which hold potential for Canada, possibly in the area of \$1.0 billion

Canada's major competitors for investment from this territory/country are:

- EEC
- United States
- Brazil
- Argentina
- Australia

The following types of activities are currently being undertaken by Canada's major competitors to attract investment from this territory/country:

- High level visits of heads of government and ministers.

IDP Partners and related program activities:

CONFINDUSTRIA

- Investment Seminars

Canadian Investment Dealers

- Investment Seminars

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: ROME

Country: ITALY

IDP Partners and related activities cont d:

Canadian Provincial Governments
- Investment Missions to Italy

Compared to major competitive destinations, Canada is perceived to have the following advantages:

- Proximity of USA market
- Availability and low cost of energy
- Low indirect labor costs

the following constraints:

- Lack of knowledge and info on investment opportunities
- Market Size
- Distance from Italy
- Lack of competitive local (ie. municipal) investment incentives

The mission indicates the following potential for various types of investment from within its territory/country:

Type of Investment	Potential
Portfolio	MEDIUM
Acquisition	MEDIUM
Greenfield	HIGH
Joint Venture	HIGH
Strategic Partnering	HIGH
Technology Licensing	HIGH

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: ROME

Country: ITALY

The mission believes that the following sectors are of greatest interest to investors in its territory/country an assigned ranking A = High B = Medium C = Low

Sector	Ranking
Agriculture/Food/Fish	C
Resource Processing	A
Machinery and Equipment	B
Transportation	A
Consumer Products	B
Commercial Service	C
Computer and Communications	B
Health Care Products/Medical	C
Aerospace and Defence	A
Strategic Technologies	A

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: ROME

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

Seq #	Date
Type: MISSION IN, TO INDUSTRY	
1	05/90
Event Description: Visit of senior management of EFIM and subsidiaries.	
City :Ottawa, Mtl, Toronto	
Country :CANADA	
Investment Nature:Greenfield	
Acquisition and strategic partn	
Investment Sector:RESOURCE PROCESSING	
Event Cooperants :	
Investment Canada, DIST, Provinces	
Estimated Budget : \$3,500.00	
2	10/90
Event Description: Visit of senior management of IRI and subsidiaries.	
City :Ottawa, Mtl, Toronto	
Country :CANADA	
Investment Nature:Greenfield	
Acquisition and Strategic partn	
Investment Sector:AREOSPACE/DEFENCE	
Event Cooperants :	
Investment Canada, DIST and Provinces	
Estimated Budget : \$3,500.00	
Total estimated budget for all proposals: \$7,000.00	

DEPARTMENT OF EXTERNAL AFFAIRS

PEMD - Proposed Government Promotional Activities 1990/91

Proposals As Of December 23/89

Post: Rome

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Contact</u>
90/05/00	50th Annual Fishing Fair, Ancona, Italy Info Booth, Only	Fisheries, Sea Products & Services
90/08/27	Ho'Texpo - Int'l Horticultural Show, Florence, Italy Info Booth, Only	Agri & Food Products & Services
90/11/00	Security Mission From Italy Mission In, To Industry	Defence Programs, Products & Services

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: MILAN

Country: ITALY

The Consulate general in Milan has responsibility for the eight northern regions of Italy where is located most of the private sector of this country and many of the operational arms of the state-owned companies which together represent nearly 80% of economic output of Italy.

The private sector is the economic backbone of Italy, its strength coming from the powerful entrepreneurial spirit which has been stimulating the creation of thousands of small businesses in virtually every manufacturing and service sector. The continuing favorable economic situation and the challenges and opportunities resulting from the 1992 EC economic integration process are pushing business and financial institutions to restructure and create the conditions which have led to Italy's overcoming France as the fourth industrial power. Businesses of all sizes including SME's continue to modernize their manufacturing facilities through automation, use of informatics and up to date processing technologies spurring local technological innovation, increased production and output and higher productivity. Ingenuity, flexibility, customization form the basis of an increasingly aggressive attitude in developing cooperative links with foreign firms in the EC, North America, Eastern Europe and Japan. The advent of 1992 is acting as yet another catalyst for companies to create international links and this process is now supported by a more outward-looking and liberal institutional environment.

The Italian context remains conducive to continued concentration of Canadian direct sales in commodities (pulp, lumber, metals/minerals, wheat), but the potential for incremental business links between Canada and Italy appears to reside in tapping the vast network of SME's in high technology activities such as precision engineering, robotics, artificial intelligence, biotechnology, CAD/CAM/CAE, flexible manufacturing, plastic, food processing, woodworking, packaging machinery, etc. These sub-sectors offer opportunities not only for Canadian suppliers to sell highly specialized products/services but also for Canada to attract this new generation of successful small business entrepreneurs through investments, joint-ventures, licensing and other forms of cooperation at academic, R&D and production levels so as to instill in Canada a similar innovative spirit which can help meet our own challenges in North America and the rest of the world.

Notwithstanding two perennial economic problems of Italy, namely public sector deficit (in excess of 10% of GNP per year) and high official unemployment (12%) economic growth continues though at a slower pace (3%) led by consumer demand and investments; industrial production growth remains high (5%) and outpaces most EEC countries. Rationalization of industry, more intensive use of labour and gross fixed investments exceeding \$ 25 billion in 1988 have meant continued productivity increases measured as plus 10% in value added per worker in

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: MILAN

Country: ITALY

1988. There is no reason to believe that these trends will change significantly in the near future. These are some of the reasons which suggest that Italy is a major relatively unexplored market for Canada which thus offers the greatest potential for incremental results if a proportionate amount of efforts and resources are put in place jointly by the Canadian business community and Governments to tackle existing market opportunities.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 EXPORT PROMOTION PRIORITIES

Mission: MILAN

Country: ITALY

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

1. ADVANCED TECH. PROD. & SERV

Spurred by the competitive challenge of 1992, investments to improve productivity continue to be a prime objective of manufacturing companies (10% increase in value added per worker in 1988) thus creating attractive opportunities in informatics, automation process control, robotics and other high technology products.

2. FOREST PRODUCTS, EQUIP, SERVICES

Italy remains one of largest lumber importers in the world which is still relatively untapped by Cdn producers of construction grade softwoods, hardwoods, plywoods, waferboards and manufactured wood components. Expected heavy spending on housing rehabilitation in private and public sectors will further enhance market opportunities.

3. AGRI & FOOD PRODUCTS & SERVICE

Italy is a large importer of a wide range of agricultural and food products including in areas of supply strength by Canadian companies e.g. specialty foods, grains, seeds and pulses, peat moss, semen, fur skins, etc. Incremental sales potential is high given relatively low level of interest of Cdn coys in the past.

4. FISHERIES, SEA PRODUCTS & SERV.

Italy is also a major importer of fish products waiting to be tackled more aggressively by Cdn suppliers. Import requirements in terms of quality, delivery, packaging and price are severe but no worse than in the rest of the EC. Canadian companies willing to adopt a long term approach to the market would find excellent sales and jv potential

5. CONSUMER PRODUCTS & SERVICES

By any measure Northern Italy is a wealthy region of Europe. High disposable income results in heavy consumer spending including in increasingly important leisure and luxury products sectors: hence an excellent potential for sales of sporting goods and furs, for example, where high quality Cdn products can almost assuredly find a niche.

6. EDUCATION, MEDICAL, HEALTH PROD

Italy imports around 80% of its medical, health care and related products. Although there is strong competition, high end and competitively priced products should sell well in Italy. Biotechnology is a fast growing market offering range of cooperative activities to Canadian companies interested.

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

1. FOREST PRODUCTS, EQUIP, SERVICES
2. MINE, METAL, MINERAL PROD & SRV
3. GRAINS AND OILSEEDS

4. ADVANCED TECH. PROD. & SERV
5. AGRI & FOOD PRODUCTS & SERVICE
6. FISHERIES, SEA PRODUCTS & SERV.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MILAN

Market: ITALY

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	16724.00 \$M	16306.00 \$M	15500.00 \$M	15800.00 \$M
Canadian Exports	23.00 \$M	25.00 \$M	26.00 \$M	26.00 \$M
Canadian Share of Market	0.14 %	0.15 %	0.16 %	0.16 %

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

Major Competing Countries

Market Share

FRANCE	24.00 %
NETHERLANDS	12.00 %
GERMANY WEST	7.00 %
DENMARK	5.00 %
GREECE	2.00 %
SPAIN	2.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. Meat (horse meat)
2. Animals and semen
3. Seeds & pulses
4. Feed fertilizer (e.g. peat moss)
5. Hides
6. Fur skins
7. Beverages (e.g. whisky)

Factors contributing to current successful Canadian exports:

- PEMD support
- Fairs and Missions support
- Trade Fair activity
- Provincial export promotion
- Competitive pricing
- Strong sectoral capability in Canada

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MILAN

Market: ITALY

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Restrictive quotas
- Non-competitive pricing
- Lack of promotion and advertising
- _____
- _____

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

Activity: Official participation in Fieragricola, Verona
Expected Results: Incremental agency agreements and sales

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

Activity: Continue to develop contacts with official Italian organizations in agric research (i.e. Federagricola, Lombardy Reg.)
Expected Results: Increase collaboration and mutual exchanges of info

Activity: Maintain and increase contacts with distributors/importers
Expected Results: Penetration of new prods in the Itl mkt and sales increase

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MILAN

Market: ITALY

Sector : FISHERIES, SEA PRODUCTS & SERV.

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	2163.00 \$M	2300.00 \$M	2400.00 \$M	2500.00 \$M
Canadian Exports	29.00 \$M	32.00 \$M	33.00 \$M	34.00 \$M
Canadian Share of Market	1.30 %	1.40 %	1.30 %	1.40 %

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

Major Competing Countries

Market Share

NETHERLANDS	15.00 %
FRANCE	15.00 %
SPAIN	10.00 %
DENMARK	9.00 %
ARGENTINA	5.00 %
CHILE	4.00 %

Current Status of Canadian

exports in this sector/subsector: Well established and growing

Products/services for which there are good market prospects:

1. Salmon
2. Cod
3. Lobsters
4. Crab and crab imitation
5. Clams
6. Ground-fish

Factors contributing to current successful Canadian exports:

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

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MILAN

Market: ITALY

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Limited Canadian capabilities
- Lack of relative importance given
- to market

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

Activity: Fishery mission of Italian buyers to Atlantic Canada.
Expected Results: Identify new suppliers & fish species to introduce in Italy

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

Activity: Frequent/regular visits to local importers and buyers.
Expected Results: Improve understanding of needs & requirements of importers

Activity: Provide Italian trade with information and documentation including on supply situation in Canada.
Expected Results: Increase awareness of Itl importers of Cdn supply capability

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MILAN

Market: ITALY

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: TELECOM, DATACOM, SAT, SPACECOM

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	8000.00 \$M	8410.00 \$M	9890.00 \$M	10990.00 \$M
Canadian Exports	22.00 \$M	23.00 \$M	25.00 \$M	28.00 \$M
Canadian Share of Market	0.27 %	0.27 %	0.25 %	0.25 %

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

Major Competing Countries

Market Share

GERMANY WEST	30.00 %
JAPAN	20.00 %
UNITED KINGDOM	10.00 %
UNITED STATES OF AMERICA	10.00 %
NETHERLANDS	10.00 %
FRANCE	10.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. PABX components
2. Fiber optics components
3. Cellular telephone

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- PEMD support
- Trade Fair activity
- Competitive pricing
- Canada is one of few sources of supply

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MILAN

Market: ITALY

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
 - Restrictive standards
 - Non-competitive pricing
 - Lack of promotion and advertising
 - Limited appreciation/understanding of distribution system
 - Market prospects have not been adequately explored
 - Lack of priority given to market
 -
-

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

Activity: Study of fiber optics sector
Expected Results: Assess market potential and appropriateness of trade mission

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

Activity: None

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

Activity: Identify most suitable local companies capable of acting as agents/distributor of Cdn coys
Expected Results: Increase Cdn coys represented and sales

Activity: Continuous monitoring of telecom mkt to alert Cdn suppliers of new opportunities
Expected Results: Increase Cdn coys represented and sales

Activity: Prepare mkt survey on telecommunications
Expected Results: Increase awareness of Cdn officials and businessmen.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MILAN

Market: ITALY

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: COMPUTERS HARD/SOFTWARE & COMP

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	4400.00 \$M	5000.00 \$M	5700.00 \$M	6500.00 \$M
Canadian Exports	19.00 \$M	21.00 \$M	24.00 \$M	28.00 \$M
Canadian Share of Market	0.43 %	0.42 %	0.42 %	0.43 %

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

Major Competing Countries

Market Share

GERMANY WEST	25.00 %
UNITED STATES OF AMERICA	20.00 %
JAPAN	20.00 %
NETHERLANDS	10.00 %
TAIWAN	10.00 %
UNITED KINGDOM	10.00 %

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

Products/services for which there are good market prospects:

1. Data entry & media conversion systems
2. Application software
3. Image processing

Factors contributing to current successful Canadian exports:

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MILAN

Market: ITALY

Factors for Canadian exports not reaching market potential:

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

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

Activity: None

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

Activity: SMAU 90 - October 90
Expected Results: Enhance profile of Italian market and increase sales

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

Activity: Identify most appropriate local companies capable of acting as agents/distributors for Cdn suppliers
Expected Results: Appointment of additional agents and thereby increased sales

Activity: Monitor local market trend to source actively Cdn suppliers in opportunity areas identified
Expected Results: Increase Cdn awareness of mkt & establish new buying connect

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MILAN

Market: ITALY

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: INSTRUMENT & PROCESS CONTROLS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1000.00 \$M	1200.00 \$M	1500.00 \$M	1800.00 \$M
Canadian Exports	6.00 \$M	7.00 \$M	8.00 \$M	9.00 \$M
Canadian Share of Market	0.60 %	0.60 %	0.53 %	0.50 %

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

Major Competing Countries

Market Share

GERMANY WEST	30.00 %
JAPAN	20.00 %
UNITED STATES OF AMERICA	15.00 %
UNITED KINGDOM	10.00 %
NETHERLANDS	10.00 %
FRANCE	5.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. Non destructive testing equipment
2. Process control for CAM & FMS
3. Analysis equipment
4. Dedicated software

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Trade Fair activity
- Competitive pricing

21/12/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MILAN

Market: ITALY

Factors for Canadian exports not reaching market potential:

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

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

Activity: None

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

Activity: Continue to monitor local market changes and intermediaries
Expected Results: Identify new reps, and report on opportunities.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MILAN

Market: ITALY

Sector : FOREST PRODUCTS, EQUIP, SERVICES

Sub-Sector: WOOD AND WOOD PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	2300.00 \$M	2450.00 \$M	2630.00 \$M	2800.00 \$M
Canadian Exports	49.00 \$M	49.00 \$M	56.00 \$M	59.00 \$M
Canadian Share of Market	2.10 %	2.00 %	2.10 %	2.10 %

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

Major Competing Countries	Market Share
AUSTRIA	35.00 %
UNITED STATES OF AMERICA	13.00 %
INDONESIA	12.00 %
YUGOSLAVIA	9.00 %
UNION OF SOVIET SOC REP	9.00 %
SWEDEN	6.00 %

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

Products/services for which there are good market prospects:

1. Softwood lumber
2. Hardwood lumber
3. Veneers
4. Plywood
5. Wood-based panels
6. Value-added products
7. Pulpwood

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- Still relatively low/
- dollar.
- stable value of Canadian

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MILAN

Market: ITALY

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored
- Performance of local agent or representative
- Cdn suppliers tend to look at Europ
- as a spot market

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

Activity: Info booth at SAIE Building Show, Bologna, Oct 1989
Expected Results: Disseminate technical info and promote sales

Activity: Outgoing construction lumber mission (Winter 1989/90)
Expected Results: Expand sales

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

Activity: Bold two or three conferences and/or technical workshop
in major cities
Expected Results: Increased awareness of technical and supply capabilities.

Activity: Identify new or renew personal contacts among major lumber
and plywood distributors/buyers
Expected Results: Establish new distrib. & expand sales of lumber/plywood

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MILAN

Market: ITALY

Sector : FOREST PRODUCTS, EQUIP, SERVICES

Sub-Sector: PULP AND PAPER PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	3850.00 \$M	4300.00 \$M	4600.00 \$M	4750.00 \$M
Canadian Exports	308.00 \$M	346.00 \$M	368.00 \$M	380.00 \$M
Canadian Share of Market	8.00 %	8.00 %	8.00 %	8.00 %

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

Major Competing Countries	Market Share
GERMANY WEST	17.00 %
SWEDEN	16.00 %
FRANCE	11.00 %
AUSTRIA	9.00 %
UNITED STATES OF AMERICA	8.00 %
FINLAND	6.00 %

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

Products/services for which there are good market prospects:

1. Pulp
2. Paper and paperboard
3. Newsprint
4. Kraft liner
5. Manuf. Paper Prods.
6. Computer forms
7. Paper toys
8. Adhesive tape
9. Book stock

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MILAN

Market: ITALY

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- Competitive Canadian financing
- Still relatively low and
- exchange.
- stable dollar rate of

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Restrictive quotas
- Non-competitive pricing
- Lack of promotion and advertising
- Though mkt prospects long standing
- have not been adequately explored

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

Activity: Investigate Italian import market in relation to Canadian supply capabilities and report to HQ.

Expected Results: Identify 2 or 3 niches and Cdn suppliers for paper products

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MILAN

Market: ITALY

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: LEISURE PROD. TOOLS HARDWARE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	280.00 \$M	290.00 \$M	296.00 \$M	305.00 \$M
Canadian Exports	3.20 \$M	3.50 \$M	4.00 \$M	4.50 \$M
Canadian Share of Market	1.14 %	1.20 %	1.35 %	1.45 %

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

Major Competing Countries	Market Share
FRANCE	30.00 %
GERMANY WEST	20.00 %
UNITED KINGDOM	15.00 %
AUSTRIA	15.00 %
DENMARK	10.00 %

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

Products/services for which there are good market prospects:

1. Sports equipment
2. Ski accessories
3. Golf equipment
4. Tennis equipment/accessories

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Competitive pricing
- Strong sectoral capability in Canada
- High quality of the

Factors for Canadian exports not reaching market potential:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MILAN

Market: ITALY

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

Activity: Support Itl buyers with documentation and information on Canadian supply sources

Expected Results: Extend retail distribution net with a new shop in Milan.

Activity: Regular visits of importers & buyers

Expected Results: Establish new contacts and define nature of opportunities

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MILAN

Market: ITALY

Sector : EDUCATION, MEDICAL, HEALTH PROD

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

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	6850.00 \$M	8500.00 \$M	9800.00 \$M	11600.00 \$M
Canadian Exports	8.60 \$M	9.00 \$M	10.00 \$M	11.00 \$M
Canadian Share of Market	0.10 %	0.10 %	0.10 %	0.10 %

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

Major Competing Countries	Market Share
GERMANY WEST	20.00 %
UNITED STATES OF AMERICA	18.00 %
FRANCE	15.00 %
JAPAN	10.00 %
NETHERLANDS	10.00 %
UNITED KINGDOM	8.00 %

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

Products/services for which there are good market prospects:

1. Biotechnology related equipment
2. Biotec. related services
3. Biotec. related instruments
4. Testing Equipment
5. Medical supplies
6. X-Ray equipment
7. High quality disposables
8. Diagnostic Equipment
9. Dental equipment
10. Pharmaceuticals
11. Eyeglass related products

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- PEMD support
- Competitive pricing
- Willingness of exporters to invest/joint venture in territory
- Innovative products

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MILAN

Market: ITALY

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Restrictive standards
- Non-competitive pricing
- Lack of promotion and advertising
- Unsuitable product
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored
- Lack of persistence
- N

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

Activity: Continue contacts to identify agents/distributors
Expected Results: 10 new candidates

Activity: Complete survey of biotechnology sector
Expected Results: Final report

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

Activity: None

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

Activity: Undertake market analysis of health care sector
Expected Results: Identify market potential, contacts & obstacles to sales

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: MILAN

Country: ITALY

The mission reports that the approximate flows to all countries of investment from its country/territory in Canadian \$ is as follows: (including portfolio flows if a primary focus)

	Total (\$ Million)	Canadian Share	Major Competitor Share
Two years ago	38800.00	0.30	42.00
One year ago	43400.00	1.00	44.00
Current year	52100.00	1.50	44.00

The mission is of the opinion that Canada can reasonably expect to attract the following amount of foreign investment from its territory/country next year:

Approx \$ 600 Cdn million through portfolio, direct investment, joint ventures, strategic partnering and technology transfer/licensing agreements

Canada's major competitors for investment from this territory/country are:

- LUXEMBOURG
- SWITZERLAND
- UNITED STATES OF AMERICA
- NETHERLANDS
- BRAZIL
- FRANCE

The following types of activities are currently being undertaken by Canada's major competitors to attract investment from this territory/country:

- 1. Incoming/outgoing missions sponsored by recipient Govt.
- 2. Participation at trade fairs with natl. stands & concurrent incoming missions.
- 3. Seminars with presentation by experts in field.
- 4. Special reports in key economic publications.
- 5. Sector specific presentations

IDP Partners and related program activities:

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: MILAN

Country: ITALY

IDP Partners and related activities cont d:

Investment Canada

- Coordinate and service enquiries

ISTC/Provinces/Municipalities

- Service Enquiries, provide market info and participate in promotional activities

Venture capital firms

- Service enquiries, I.D. potential partners

Itl Industrial Associations

- Provide market info, I.D. Itl investors, assist in mailing campaigns, assist with programs for missions

Italian Banks (BCI, BNL, Banca d'Italia, San Paolo, Mediocredito)

- I.D. clients, provide assessment, participate in promo event

Cdn banks (Royal Bank, CIBC, Nova Scotia)

- Co-sponsor promotional activities

Italian Chambers of Commerce

- Co-sponsor promo events, organize missions, provide info

Italian Fair authorities

- Assist in I.D. clients, organize events

Cdn/Ital law firms

- Assist in promo activities, info to clients

Cdn/Ital accounting firms

- Assist in promo activities, info to clients

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: MILAN

Country: ITALY

Compared to major competitive destinations, Canada is perceived to have the following advantages:

- Proximity to U.S. & F.T.A.
- Growth potential
- Stable social, political, economic environment
- Friendlier base to gain experience in North America
- Traditional, historical linkage with Europe

the following constraints:

- Insufficient financial or other incentives (e.g. tax) by comparison to other sources
- Difficulty in locating suitable partners i.e. servicing enquiries
- Cdn companies not receptive/capable with regard to strategic partnering
- Distance
- Lack of awareness of Canada as viable industrialized country

The mission indicates the following potential for various types of investment from within its territory/country:

Type of Investment	Potential
Portfolio	HIGH
Acquisition	MEDIUM
Greenfield	LOW
Joint Venture	HIGH
Strategic Partnering	HIGH
Technology Licensing	HIGH

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RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: MILAN

Country: ITALY

The mission believes that the following sectors are of greatest interest to investors in its territory/country an assigned ranking A = High B = Medium C = Low

Sector	Ranking
Agriculture/Food/Fish	A
Resource Processing	C
Machinery and Equipment	A
Transportation	B
Consumer Products	A
Commercial Service	B
Computer and Communications	B
Health Care Products/Medical	C
Aerospace and Defence	C
Strategic Technologies	A

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: MILAN

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

Seq #	Date
Type: INSTITUTIONAL EXHIBIT	
4	03/91
Event Description: Institutional exhibit and meeting area at IPACK-IMA Plastic Exhibition	
City :Milan	
Country :ITALY	
Investment Nature:4,5,6	
Investment Sector:MACHINERY/EQUIPMENT	
Event Cooperants :	
Fair authorities; industrial associations; Investment Canada/ISTC	
Estimated Budget : \$30,000.00	
Type: SEMINAR, ABROAD	
6	05/90
Event Description: Investment opportunities presentations on target sectors	
City :	
Country :ITALY	
Investment Nature:3,4,5,6	
Investment Sector:STRATEGIC TECHNOLOGIES	
Event Cooperants :	
Industrial associations; financial institutions	
Estimated Budget : \$2,000.00	
7	01/91
Event Description: Update on investment climate to financial intermediaries	
City :Milan	
Country :ITALY	
Investment Nature:1,5	
Investment Sector:STRATEGIC TECHNOLOGIES	
Event Cooperants :	
Financial community	
Estimated Budget : \$5,000.00	

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: MILAN

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

Seq #	Date
Type: MISSION IN, TO INDUSTRY	
9	09/90
Event Description:	
Mission of 5-6 best leads	
City :	
Country : CANADA	
Investment Nature: 3, 4, 5, 6	
Investment Sector: MACHINERY/EQUIPMENT	
Event Cooperants :	
ISTC / Investment Canada	
Estimated Budget : \$10,000.00	
Type: DIRECT MAIL CAMPAIGN	
3	10/90
Event Description:	
Provision of regular updates on investment opportunities in Canada within target sectors	
City :	
Country : ITALY	
Investment Nature: 1, 3, 4, 5, 6	
Investment Sector: AGRICULTURE/FOOD/FISH	
Event Cooperants :	
Industrial associations; data banks	
Estimated Budget : \$6,000.00	
Type: OUTCALL PROGRAM	
1	08/90
Event Description:	
Corporate liaison to follow up on old & generate new leads in target sectors	
City :	
Country : ITALY	
Investment Nature: 1, 3, 4, 5, 6	
Investment Sector: MACHINERY/EQUIPMENT	
Event Cooperants :	
Estimated Budget : \$10,000.00	

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: MILAN

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

Seq #	Date
Type: OTHER PROMOTION	
2	09/90
Event Description: Strategic partnering follow up on leads, generate new leads and sources of capital	
City :	
Country : ITALY	
Investment Nature: 5	
Investment Sector: STRATEGIC TECHNOLOGIES	
Event Cooperants :	
Venture capital and industrial associations	
Estimated Budget : \$6,000.00	
8	01/91
Event Description: Specialized articles on investment opportunities in target sectors to run in specialty magazines	
City : Milan	
Country : ITALY	
Investment Nature: 3,4,5,6	
Investment Sector: MACHINERY/EQUIPMENT	
Event Cooperants :	
Media; consultants	
Estimated Budget : \$20,000.00	
5	04/90
Event Description: Investment opportunity profile study in Canada and Italy followed by mail campaign/corporate calls	
City :	
Country : ITALY	
Investment Nature: 3,4,5,6	
Investment Sector: AGRICULTURE/FOOD/FISH	
Event Cooperants :	
Fair authorities; industrial associations; consultants	
Estimated Budget : \$10,000.00	

Total estimated budget for all proposals: \$99,000.00

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PEMD - Proposed Government Promotional Activities 1990/91

Proposals As Of December 23/89

Post: Milan

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Contact</u>
90/04/05	Children's Book Fair Bologna, Italy Fair, National Stand	Consumer Products S.Waterfall/G.Cote
90/04/21	Milan Spring Fair Milan, Italy Other Promotion	
90/06/0000	Italian Fish Buyers To Atlantic Canada Mission In, To Industry	Fisheries, Sea Products & Services
90/10/04	Smau 90 (Informatics) Milan, Italy Fair, National Stand	Advanced Tech.Products & Services
91/03/00	Verona Fair Verona, Italy Info Booth, With Group	Agri & Food Products & Services

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: STOCKHOLM

Country: SWEDEN

The Swedish private sector has been investing heavily abroad due to recent removal of currency controls, possibility of drastically increased energy prices, and private sector interest in taking advantage of the post-1992 Europe and North American FTA environments. Purchases by major Swedish corporations of Falconbridge and Westinghouse are but two recent examples.

While the government is at odds with industry (and labour) on the energy issue, there is unanimity on the question of the single European Market - all agree that every effort must be made to take advantage of it. The government regards its non-aligned policy as a block to actual membership in the EC, but is aiming at making Sweden a de facto economic member through harmonization of Swedish regulations, standards, etc., and through seeking an institutional relationship via EFTA that will ensure participation in the four freedoms.

Sweden's foreign trade has been increasing with both exports and imports rising over the previous 12 month period (+13% and +4% respectively as of Aug 1989), resulting in an improved balance of trade, which for Jan-Aug is showing a SEK 15 (CAD 2.8) billion surplus, up marginally from one year ago. Notable structural problems in the economy include inflation, slow growth (despite full employment), high absenteeism in both public and private sectors, high income and corporate taxes and the large and growing percentage of GDP coming from the public sector. The country's highly regarded Finance Minister (Feldt) has proposed a new taxation package built around marginal income tax cuts (e.g. maximum rate of 72% dropping to about 50%). The difference is to be made up primarily through wider application of VAT which is now 23.46%.

Outlook:

Background to energy issue is parallel political decisions to phase out nuclear power, reduce harmful power plant emissions and prevent exploitation of new hydro resources. Short term reversal of these directives is unlikely; thus the flow of investment abroad will continue, which will generate new (e.g. energy related) investment/technology transfer opportunities for Canada. Liberalization of Sweden's banking system to conform with that of the EC means that Canadian banks now have greater access to the Swedish market than ever before. Swedish financial institutions are small by world standards and have been domestically oriented; as a result, major Swedish companies recognize the need for foreign banking expertise when venturing abroad.

Real imports should increase by about 4.5% in 1990 compared to the 5% increase projected for 1989. For Canadian companies this will mean continuation of good marketing conditions here.

CAIL will begin direct flights into Copenhagen December 3, 1989 and by Summer 1990 expects to add Stockholm to the route. This offers a useful opportunity to initiate an official tourism promotion program in Sweden.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 EXPORT PROMOTION PRIORITIES

Mission: STOCKHOLM

Country: SWEDEN

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

1. ADVANCED TECH. PROD. & SERV
Well dev. telecom+datacom netw, large base of cellular ph+comp. terminals
2. FISHERIES, SEA PRODUCTS & SERV.
High per cap fish consump., quality consc. market, traditional importer.
3. DEFENCE PROGRAMS, PRODUCTS, SERV
MOU on defence R&D coop., penetr. of territ. waters by unidentif. subs.
4. CONSUMER PRODUCTS & SERVICES
Pref. for NthAm styles, 90% apparel+textile imported, strong sports market.
5. TRANSPORT SYS, EQUIP, COMP, SERV.
Presence 2 auto + 1 aircraft manuf., need for mass transit.
6. AGRI & FOOD PRODUCTS & SERVICE

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

- | | |
|--------------------------------------|------------------------------------|
| 1. TRANSPORT SYS, EQUIP, COMP, SERV. | 4. FISHERIES, SEA PRODUCTS & SERV. |
| 2. MINE, METAL, MINERAL PROD & SRV | 5. |
| 3. ADVANCED TECH. PROD. & SERV | 6. |

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: STOCKHOLM

Market: SWEDEN

Sector : FISHERIES, SEA PRODUCTS & SERV.

Sub-Sector: FISH & SHELLFISH & OTHER PROD

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	167.00 \$M	187.00 \$M	175.00 \$M	180.00 \$M
Canadian Exports	13.80 \$M	12.80 \$M	11.80 \$M	11.00 \$M
Canadian Share of Market	8.30 %	6.90 %	11.80 %	11.00 %

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

Major Competing Countries

Market Share

SWEDEN	45.00 %
NORWAY	19.00 %
DENMARK	12.00 %
NETHERLANDS	7.00 %
CANADA	5.00 %
UNITED STATES OF AMERICA	4.00 %

Current Status of Canadian

exports in this sector/subsector: Well established and growing

Products/services for which there are good market prospects:

1. Pacific Salmon, frozen
2. Eels, gutted, frozen
3. Halibut, frozen
4. Scallops, frozen
5. Cod fillets, frozen
6. Lumpfish roe, frozen
7. Freshwater lake herring (cicso) roe, frozen
8. Mackarel fillets, frozen
9. Cod roe, frozen

Factors contributing to current successful Canadian exports:

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: STOCKHOLM

Market: SWEDEN

Factors for Canadian exports not reaching market potential:

- _____
- _____

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

Activity: Identify Cdn (long term) suppliers of cod fillets.
Expected Results: Increased sales.

Activity: Identify Cdn suppliers of freshwater fish roe.
Expected Results: Increased sales.

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

Activity: Post representative to attend SIAL '90 in Paris.
Expected Results: Post netw. of Cdn suppl. and local buyers will be expanded.

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

Activity: Identify Cdn suppliers of frozen gutted eels.
Expected Results: Double sales volume.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: STOCKHOLM

Market: SWEDEN

Sector : FISHERIES, SEA PRODUCTS & SERV.

Sub-Sector: PROCESSED FISH & SHELLFISH

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	297.00 \$M	287.00 \$M	283.00 \$M	286.00 \$M
Canadian Exports	18.50 \$M	19.40 \$M	20.20 \$M	21.00 \$M
Canadian Share of Market	6.20 %	6.80 %	7.10 %	7.30 %

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

Major Competing Countries

Market Share

SWEDEN	42.00 %
NORWAY	13.00 %
DENMARK	9.00 %
GREENLAND	5.00 %
CANADA	4.00 %
UNITED STATES OF AMERICA	3.00 %

Current Status of Canadian

exports in this sector/subsector: Well established and growing

Products/services for which there are good market prospects:

1. Shrimp IQF cooked shell-on
2. Shrimp IQF cooked Shell-off
3. Cod, Roe cured
4. Lumpfish, Roe, cured
5. Crayfish, freshwater frozen/cooked
6. Lobster frozen/cooked in brine
7. Herring barrelled cured
8. Crabmeat, frozen
9. Lobster meat, cooked

Factors contributing to current successful Canadian exports:

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: STOCKHOLM

Market: SWEDEN

Factors for Canadian exports not reaching market potential:

- _____
- _____

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

Activity: Identify Cdn firms to supply frozen, cooked freshwater crayfish for large seasonal trade.
Expected Results: Establ. Cdn capab. to supply multi-million market opportun.

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

Activity: Post representative to attend SIAL '90 in Paris.
Expected Results: Post Network of Cdn suppl. and local buyers will be expanded

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

Activity: Identify Cdn suppliers of shrimp IQF cooked shell-on
Expected Results: Increase Cdn share of local multi-million dollar market.

Activity: Increase Cdn share of local multi-million dollar market.
Expected Results: Increase Cdn share of local multi-million dollar market

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: STOCKHOLM

Market: SWEDEN

Sector : GRAINS AND OILSEEDS

Sub-Sector: CEREAL GRAINS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	26.00 \$M	25.00 \$M	25.00 \$M	26.00 \$M
Canadian Exports	12.40 \$M	10.60 \$M	10.40 \$M	11.00 \$M
Canadian Share of Market	47.00 %	42.00 %	42.00 %	42.00 %

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

Major Competing Countries

Market Share

SWEDEN	82.00 %
CANADA	7.00 %
GERMANY WEST	6.00 %
UNITED STATES OF AMERICA	2.00 %
FINLAND	1.00 %

Current Status of Canadian

exports in this sector/subsector: Mature with little growth

Products/services for which there are good market prospects:

1. Wheat grains.
2. Durum, grain.

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- _____
- _____

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: STOCKHOLM

Market: SWEDEN

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

Activity: Reinforce reputation of Canadian Durum.
Expected Results: Maint. buyers' knowl. of Cdn durum specs & competitiveness.

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

Activity: Encourage invitation to CIGI courses also be issued in the future to key person in local processing industry.
Expected Results: Incr. awaren. of outst. qual. of Cdn grains, incr. local purch

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: STOCKHOLM

Market: SWEDEN

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: AEROSPACE & MARINE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	151.00 \$M	235.00 \$M	0.00 \$M	0.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.00 \$M	0.00 \$M
Canadian Share of Market	1.00 %	1.00 %	0.00 %	0.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	0.00 %
EUROPEAN COMMON MARKET C	0.00 %
WEST EUROPE	0.00 %

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

Products/services for which there are good market prospects:

1. Electronics
2. Aerospace Systems
3. Marine Equipment
4. Armaments

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Limited appreciation/understanding of distribution system
- _____
- _____

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: STOCKHOLM

Market: SWEDEN

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

Activity: Canada-Sweden RDP Meeting (in Sweden).
Expected Results: Identification of new prospects.

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

Activity: Outgoing Defence Equipment Mission.
Expected Results: Establishment of Marketing Channels.

Activity: Commissioned Local Survey of Defence Equipment Market.
Expected Results: Definition of Market Strategy.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: STOCKHOLM

Market: SWEDEN

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: BROADCASTING, INC. CABLE TV

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	300.00 \$M	300.00 \$M	350.00 \$M	350.00 \$M
Canadian Exports	3.00 \$M	3.00 \$M	3.50 \$M	3.50 \$M
Canadian Share of Market	1.00 %	1.00 %	1.00 %	1.00 %

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

Major Competing Countries

Market Share

JAPAN	30.00 %
GERMANY WEST	20.00 %
KOREA	20.00 %
UNITED STATES OF AMERICA	15.00 %
UNITED KINGDOM	15.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. TV & Video recording equipment
2. CATV products
3. Sound recording equipment

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Unsuitable product
- _____
- _____

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: STOCKHOLM

Market: SWEDEN

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

Activity: Visit to Cdn CATV operators and equipm. manuf. by 2-3 major Swedish CATV operators.
Expected Results: Closer cooperation with Cdn firms.

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

Activity: Trade mission to Sweden and seminars for CATV operators and equipment manufacturers.
Expected Results: Incr. awareness of Cdn capabilities, new buying connections.

Activity: Cdn booth at Satellite 91 Stockholm.
Expected Results: Good market prospect with cons. incr. interest in CATV 88-89

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: STOCKHOLM

Market: SWEDEN

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: REMOTE SENSING INC. SPACE SAT

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	65.00 \$M	70.00 \$M	70.00 \$M	70.00 \$M
Canadian Exports	3.00 \$M	3.00 \$M	3.50 \$M	3.50 \$M
Canadian Share of Market	5.00 %	5.00 %	5.00 %	5.00 %

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

Major Competing Countries

Market Share

SWEDEN	50.00 %
FRANCE	15.00 %
UNITED STATES OF AMERICA	10.00 %
GERMANY WEST	10.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. Imaging equipment
2. Imaging software
3. Earth receiving stations

Factors contributing to current successful Canadian exports:

- Strong sectoral capability in Canada
- Competitive Canadian financing

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored
- Airborne photometric
- act. defence control

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: STOCKHOLM

Market: SWEDEN

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

- Activity: Nordic remote sensing seminars promoting Cdn R&D and technical aspects.
- Expected Results: Better awareness in the R.S. Community of Cdn capabilities.

- Activity: Report on R.S. activities in the private sector, incl. imaging analysing software use, storage medias, graphic medias
- Expected Results: Better targetting of buyers for niche products & technology.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: STOCKHOLM

Market: SWEDEN

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: OTHER ELECTRONICS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1000.00 \$M	1100.00 \$M	1200.00 \$M	1300.00 \$M
Canadian Exports	8.00 \$M	8.00 \$M	10.00 \$M	11.00 \$M
Canadian Share of Market	0.80 %	0.80 %	0.80 %	0.80 %

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

Major Competing Countries

Market Share

SWEDEN	25.00 %
JAPAN	20.00 %
UNITED STATES OF AMERICA	20.00 %
GERMANY WEST	20.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. Semi Conductors
2. Printed Circuit Boards
3. Connectors

Factors contributing to current successful Canadian exports:

- Strong sectoral capability in Canada
- Competitive Canadian financing

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored
- Cdn export control.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: STOCKHOLM

Market: SWEDEN

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

Activity: Continued promotion of Cdn. electr. companies through corporate visits and support to agents.

Expected Results: 3-5 new buying connections.

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

Activity: Promotion of Cdn participation in major electric components trade fairs in Europe.

Expected Results: Better awareness of Cdn capability among Swe OEMS and distr.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: STOCKHOLM

Market: SWEDEN

Sector : TRANSPORT SYS, EQUIP, COMP, SERV.

Sub-Sector: AUTOMOTIVE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	4400.00 \$M	5000.00 \$M	5500.00 \$M	6000.00 \$M
Canadian Exports	30.00 \$M	35.00 \$M	39.00 \$M	42.00 \$M
Canadian Share of Market	0.70 %	0.70 %	0.70 %	0.70 %

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

Major Competing Countries

Market Share

SWEDEN	0.00 %
GERMANY WEST	0.00 %
JAPAN	0.00 %
UNITED KINGDOM	0.00 %

Current Status of Canadian

exports in this sector/subsector: Well established and growing

Products/services for which there are good market prospects:

1. Vans
2. Auto parts
3. Snow ploughs
4. Snow mobiles

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- _____
- _____

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: STOCKHOLM

Market: SWEDEN

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

Activity: Buyers to Canada Automotive Show.
Expected Results: Increased Exports.

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

Activity: Approach Saab on new suppliers.
Expected Results: Identification of new opportunities.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: STOCKHOLM

Market: SWEDEN

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: URBAN TRANSIT

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	45.00 \$M	50.00 \$M	55.00 \$M	0.00 \$M
Canadian Exports	0.50 \$M	0.50 \$M	0.50 \$M	0.00 \$M
Canadian Share of Market	1.00 %	1.00 %	1.00 %	0.00 %

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

Major Competing Countries	Market Share
SWEDEN	0.00 %
GERMANY WEST	0.00 %

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

Products/services for which there are good market prospects:

1. Specialized buses
2. Vehicle control/identification systems

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- _____
- _____

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: STOCKHOLM

Market: SWEDEN

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: AEROSPACE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	500.00 \$M	550.00 \$M	550.00 \$M	600.00 \$M
Canadian Exports	3.00 \$M	3.00 \$M	3.00 \$M	4.00 \$M
Canadian Share of Market	0.80 %	0.60 %	0.60 %	0.70 %

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

Major Competing Countries

Market Share

SWEDEN	0.00 %
UNITED STATES OF AMERICA	0.00 %
UNITED KINGDOM	0.00 %
GERMANY WEST	0.00 %

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

Products/services for which there are good market prospects:

1. Simulators
2. Components

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Lack of commitment to the market
-

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: STOCKHOLM

Market: SWEDEN

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

Activity: Identify procurement needs of Saab-Scanis.
Expected Results: New opportunities identified.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: STOCKHOLM

Market: SWEDEN

Sector : FOREST PRODUCTS, EQUIP, SERVICES

Sub-Sector: WOOD AND WOOD PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	951.00 \$M	1011.00 \$M	960.00 \$M	1020.00 \$M
Canadian Exports	11.10 \$M	12.20 \$M	12.30 \$M	12.60 \$M
Canadian Share of Market	1.20 %	1.20 %	1.30 %	1.20 %

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

Major Competing Countries

Market Share

SWEDEN	70.00 %
UNION OF SOVIET SOC REP	7.00 %
FINLAND	7.00 %
GERMANY WEST	5.00 %
DENMARK	3.00 %
NORWAY	3.00 %

Current Status of Canadian

exports in this sector/subsector: Well established and growing

Products/services for which there are good market prospects:

1. Hardwood (excl. tropical and birch) saw logs.
2. Hardwood (non-tropical) veneer.
3. Hardwood pulpwood/chips.
4. Pallet components, softwood, kiln dried.
5. Oak, sawn.
6. Plywood, softwood construction.
7. Walnut, sawn.
8. Ash, sawn.
9. Maple, sawn.
10. Fibreboard.

Factors contributing to current successful Canadian exports:

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: STOCKHOLM

Market: SWEDEN

Factors for Canadian exports not reaching market potential:

- _____
- _____

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

- Activity: Ongoing contact with local plant protection on pinewood nematode issue. Monitoring developments.
Expected Results: Rev of imp. ban on softw.,pulpw./chips w. restored mrkt accs
- Activity: Ongoing contact with local buyers to learn of openings for hardwood pulpwood and chips.
Expected Results: Establish market opportunities.

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

- Activity: Identify regular sources of Kilndried softwood pallet components.
Expected Results: Establishment of new market and buying connections.
- Activity: Identify regular sources of softwood plywood - construction grade.
Expected Results: Increased sales.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: STOCKHOLM

Market: SWEDEN

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: APPAREL (CLOTH, FUR, SHOES) TEXT

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	245.09 \$M	119.70 \$M	93.10 \$M	110.00 \$M
Canadian Exports	13.58 \$M	8.93 \$M	0.00 \$M	9.50 \$M
Canadian Share of Market	5.50 %	0.00 %	7.50 %	8.60 %

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

Major Competing Countries

Market Share

GREECE	24.70 %
DENMARK	17.90 %
GERMANY WEST	14.20 %
KOREA	17.90 %
HONG KONG	7.50 %
FINLAND	5.70 %

Current Status of Canadian

exports in this sector/subsector: Market share declining

Products/services for which there are good market prospects:

1. Mink
2. Fox
3. Raccoon
4. Coyote
5. Beaver
6. Muskrat

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector

Factors for Canadian exports not reaching market potential:

- _____
- _____

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: STOCKHOLM

Market: SWEDEN

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: CULTURE INDUSTRIES

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	20.27 \$M	17.58 \$M	19.50 \$M	22.50 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.35 \$M	0.45 \$M
Canadian Share of Market	0.00 %	0.00 %	1.80 %	2.00 %

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

Major Competing Countries

Market Share

UNITED KINGDOM	45.80 %
UNITED STATES OF AMERICA	16.00 %
ITALY	13.60 %
FRANCE	6.60 %
SPAIN	5.10 %
DENMARK	3.40 %

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

Products/services for which there are good market prospects:

1. TV, Documentary Films
2. Educational
3. Video
4. Books (fiction)
5. Records / CDs

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Preference for English

Factors for Canadian exports not reaching market potential:

- _____
- _____

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: STOCKHOLM

Market: SWEDEN

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

Activity: Brief market survey for feature film market.
Expected Results: Market transparency to Cdn exporter.

Activity: Identify incoming buyers to Toronto and Montreal festivals.
Expected Results: Increased sales.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: STOCKHOLM

Market: SWEDEN

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: LEISURE PROD. TOOLS HARDWARE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	300.00 \$M	250.00 \$M	260.00 \$M	280.00 \$M
Canadian Exports	15.00 \$M	12.00 \$M	16.00 \$M	18.00 \$M
Canadian Share of Market	5.00 %	4.80 %	6.20 %	6.40 %

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

Major Competing Countries	Market Share
TAIWAN	0.00 %
UNITED STATES OF AMERICA	0.00 %

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

Products/services for which there are good market prospects:

1. Skates
2. Mountain Bicycles
3. Gym Equipment
4. Golf Accessories
5. Football/baseball equipment

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- _____
- _____

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: STOCKHOLM

Market: SWEDEN

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: FURNITURE & APPLIANCES

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	29.18 \$M	198.31 \$M	121.56 \$M	135.00 \$M
Canadian Exports	0.34 \$M	784.00 \$M	0.96 \$M	1.10 \$M
Canadian Share of Market	1.20 %	0.30 %	0.70 %	0.80 %

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

Major Competing Countries	Market Share
DENMARK	32.50 %
BELGIUM	17.00 %
GERMANY WEST	13.40 %
SWITZERLAND	7.30 %
UNITED KINGDOM	5.80 %

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

Products/services for which there are good market prospects:

1. Tufted carpets - wool
2. Tufted carpets - synthetic
3. Mats

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector

Factors for Canadian exports not reaching market potential:

- _____
- _____

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: STOCKHOLM

Country: SWEDEN

The mission reports that the approximate flows to all countries of investment from its country/territory in Canadian \$ is as follows: (including portfolio flows if a primary focus)

	Total (\$ Million)	Canadian Share	Major Competitor Share
Two years ago	3000.00	2.00	50.00
One year ago	3920.00	2.00	50.00
Current year	5000.00	2.00	50.00

The mission is of the opinion that Canada can reasonably expect to attract the following amount of foreign investment from its territory/country next year:

CAD 200 million

Canada's major competitors for investment from this territory/country are:

- EC
- U.S.A.
- EFTA

The following types of activities are currently being undertaken by Canada's major competitors to attract investment from this territory/country:

- Use of international banking connections.
Calls on CEO's of Swedish Companies.

IDP Partners and related program activities:

Leading Swedish Economic Journalists.

- Articles on Canadian Industrial (FTA etc.) Environment

Canadian Airlines International

- Joint Promotion of New Air Route to Canada

Swedish Export Council

- Identification of Specific Potential Investors.

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: STOCKHOLM

Country: SWEDEN

IDP Partners and related activities cont d:

Swedish Chamber of Commerce

- Identification of Potential Investors.

Quebec Office, Stockholm.

- Collaboration on Investment Opportunities

Canadian Private Banks

- Collaboration on Investment Opportunities.

Compared to major competitive destinations, Canada is perceived to have

the following advantages:

- Proximity to the US Market.
- Quality of Life.
- Availability of Trained Workers.

the following constraints:

- Substitute for Location in U.S.A.
- Small Domestic Market.
- Higher Fringe Benefit Costs/Taxes.

The mission indicates the following potential for various types of investment from within its territory/country:

Type of Investment	Potential
Portfolio	LOW
Acquisition	HIGH
Greenfield	MEDIUM
Joint Venture	HIGH
Strategic Partnering	HIGH
Technology Licensing	HIGH

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RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: STOCKHOLM

Country: SWEDEN

The mission believes that the following sectors are of greatest interest to investors in its territory/country an assigned ranking A = High B = Medium C = Low

Sector	Ranking
Agriculture/Food/Fish	A
Resource Processing	A
Machinery and Equipment	A
Transportation	A
Consumer Products	C
Commercial Service	C
Computer and Communications	B
Health Care Products/Medical	B
Aerospace and Defence	B
Strategic Technologies	B

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: STOCKHOLM

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

Seq #	Date
Type: SEMINAR, ABROAD	
1 Event Description:	11/90
Technical Presentation Canadian Energy Availability.	
City :	
Country : SWEDEN	
Investment Nature: All	
Investment Sector: AGRICULTURE/FOOD/FISH	
Event Cooperants :	
EMR Provinces	
Estimated Budget : \$16,000.00	
Type: MISSION IN, TO INDUSTRY	
2 Event Description:	08/90
Incoming Economic Journalists	
City :	
Country : CANADA	
Investment Nature: All	
Investment Sector: AGRICULTURE/FOOD/FISH	
Event Cooperants :	
Swedish Journalist Provinces	
Estimated Budget : \$24,000.00	
Type: OUTCALL PROGRAM	
3 Event Description:	09/90
Direct Mail and Provincial Ministers' Visits	
City :	
Country : SWEDEN	
Investment Nature: A, JV	
Investment Sector: AGRICULTURE/FOOD/FISH	
Event Cooperants :	
Swedish Export Council, Provinces	
Estimated Budget : \$1,500.00	

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: STOCKHOLM

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

Seq #	Date
Type: OUTCALL PROGRAM	
4	10/90
Event Description: To encourage consideration of Investments in Canada.	
City :	
Country : SWEDEN	
Investment Nature: A, JV	
Investment Sector: RESOURCE PROCESSING	
Event Cooperants :	
Chamber of Commerce, Provinces	
Estimated Budget : \$1,500.00	
Type: OTHER PROMOTION	
5	02/91
Event Description: Announcements in Selected Professional Journals.	
City :	
Country : SWEDEN	
Investment Nature: A, JV	
Investment Sector: AGRICULTURE/FOOD/FISH	
Event Cooperants :	
Canadian Airlines International	
Estimated Budget : \$4,000.00	
6	03/91
Event Description: Translation of one investment brochure into Swedish	
City :	
Country : SWEDEN	
Investment Nature: All	
Investment Sector: AGRICULTURE/FOOD/FISH	
Event Cooperants :	
Estimated Budget : \$6,000.00	
Total estimated budget for all proposals: \$53,000.00	

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PEMD - Proposed Government Promotional Activities 1990/91

Proposals As Of December 23/89

Post: Stockholm

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Contact</u>
90/05/08	SPCI'90-Int'l Pulp & Paper Cpnf. Exh., Stockholm, Sweden Info Booth, Only	Forest Products, Equip & Services G.Mccallum

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: HAGUE, THE

Country: NETHERLANDS

In 1989 the Dutch economy continued its modest but firmly based recovery, begun in 1983 when the present Government assumed power. In fact, during 1988, the Dutch economy showed its greatest growth this decade, with the GNP growing by over 2.5% (4.25% excluding the energy sector). Economic growth in 1989 is expected to be in the order of 3% but will begin to slow in 1990. Buoyant exports and strong investment growth have been the main factors behind this favorable economic performance. The program of austerity implemented by the Government has reduced the budget deficit to 5.4% of the GDP, and has reduced unemployment to 10%, from 12% the previous year. These measures, and a buoyant international sector, have prompted strong investment, which grew by 6.5% in 1988. Growth in industrial production has exceeded the European average by nearly 6% since 1980. Cuts in social security payments and VAT rates have strengthened consumer confidence, and consumer spending has increased in 1989 and will remain strong in 1990. Inflation was less than 1% in 1988 and is expected to rise to no higher than 1.4% in 1989, still the lowest of the EC. However, strong consumer demand, higher natural gas prices and housing costs are expected to drive inflation up in 1990. Dutch monetary policy closely follows changes in the USA and West Germany, and interest rates are expected to remain high, with a prime rate forecast at 8.75% at the end of 1989.

The international sector continues to be the key component of the Dutch economy with almost 60% of the GNP being trade related. Over 70% of Dutch exports go to other EC countries (30% to Germany alone) while the USA and Japan account for much of the rest. Despite a strong and rising guilder, Dutch exports remain strong and the trade balance has registered a surplus of 2-3% of GNP. The current account surplus is expected to increase to DFL 8.5 billion in 1989.

Import growth, primed in part by a favourable exchange rate is expected to remain in the 3-4% range. Key suppliers are EEC partners, the USA and Japan and the main imports are crude oil, foodstuffs, chemicals, transport equipment and other machinery and a broad range of consumer goods. The Netherlands remains one of Canada's most important markets. Sales to the Netherlands rose to Canadian \$ 1,021 million in 1987 and exceeded Canadian \$ 1,300 million in 1988. This trend is continuing. The significant decline two years ago of the Canadian dollar against the guilder has made Canadian goods more competitive, hence expanding the breadth and depth of opportunities. This has caused a remarkable increase in Dutch enquiries for Canadian goods and there are excellent and improving prospects for the sale of Canadian informatics, communications, defence and electronics equipment, software, environmental equipment and technology, foodstuffs, fish (including different species), automation and process control, forest products, sporting goods etc.

Moreover, the strong guilder combined with Canada's favourable investment climate and the prospects for Canada-U.S. free trade, have made Canada an increasingly attractive destination for Dutch investment as demonstrated by the number of enquiries. Further, the number of Dutch visitors to Canada rose by 12% in 1988 and has grown 2.6% to date this year. The Netherlands continues to be an excellent source for new technologies. In sum, an improving Dutch economy and the inherent strengths of the Nether-

01/12/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: HAGUE, THE

Country: NETHERLANDS

lands combined with favourable exchange rates should allow the Netherlands to continue, indeed, improve, as an excellent economic partner for Canada.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 EXPORT PROMOTION PRIORITIES

Mission: HAGUE, THE

Country: NETHERLANDS

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

1. ADVANCED TECH. PROD. & SERV

Informatics sector growing 15-20% annually. Dutch are more receptive to English language software/documentation than many other Continental Europeans.

2. DEFENCE PROGRAMS, PRODUCTS, SERV

Large portion of Dutch MOD requirements are imported. Procurement officials are open to new technology. Armed services of both countries exchange information freely and respect each others recommendations.

3. FOREST PRODUCTS, EQUIP, SERVICES

Timber frame construction has gained limited acceptance in the Netherlands. There is potential for greater market share. SPF also used in renovation work. Western red cedar growing in popularity. There are additional opportunities for hard/softwoods in light of increasing resistance to use of tropical hardwood.

4. AGRI & FOOD PRODUCTS & SERVICE

Potential for agricultural products not governed by EC levy system is determined to a significant extent by value of the dollar. There are prospects for high-quality, well-presented specialty foods.

5.

6.

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

1. MINE, METAL, MINERAL PROD & SRV
2. CHEM PROD & PETROCHEM, EQP, SERV
3. FOREST PRODUCTS, EQUIP, SERVICES

4. AGRI & FOOD PRODUCTS & SERVICE
- 5.
- 6.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: HAGUE, THE

Market: NETHERLANDS

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	13632.00 \$M	13584.00 \$M	12900.00 \$M	13300.00 \$M
Canadian Exports	58.00 \$M	54.00 \$M	70.00 \$M	80.00 \$M
Canadian Share of Market	0.42 %	0.39 %	0.54 %	0.60 %

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

Major Competing Countries

Market Share

BELGIUM	21.00 %
GERMANY WEST	18.00 %
FRANCE	11.00 %
UNITED KINGDOM	6.00 %
UNITED STATES OF AMERICA	4.00 %

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

Products/services for which there are good market prospects:

1. Dry pulses (feed and human consumption)
2. Soybeans (food grade)
3. Frozen and canned corn
4. Horsemeat, meat offals, specialty beef
5. Frozen blueberries
6. Specialty quality foods

Factors contributing to current successful Canadian exports:

- PEMD support
- Competitive pricing
- Strong sectoral capability in Canada

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: HAGUE, THE

Market: NETHERLANDS

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Import duties are high
- Non-competitive pricing
- Limited appreciation/understanding of distribution system
- Limited Canadian capabilities
- _____
- _____

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

Activity: Service steady flow of enquiries from Canadian suppliers
Expected Results: Expanding market share

Activity: Encourage Dutch agents/importers to visit Canadian exhibits at major European food/agricultural shows
Expected Results: Increasing awareness of Cdn supply capabilities

Activity: Examine and evaluate implications of Europe 1992 for Canadian exporters
Expected Results: Adjustment of market approach where desirable.

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

Activity: Identify food/groceries trade fair in Canada with sufficient Canadian content suitable for selected incoming buyers.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: HAGUE, THE

Market: NETHERLANDS

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1720.00 \$M	1818.00 \$M	1910.00 \$M	1948.00 \$M
Canadian Exports	49.00 \$M	30.00 \$M	35.00 \$M	35.00 \$M
Canadian Share of Market	2.80 %	1.70 %	1.80 %	1.70 %

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

Major Competing Countries

Market Share

NETHERLANDS	40.00 %
UNITED STATES OF AMERICA	25.00 %
GERMANY WEST	12.00 %
UNITED KINGDOM	10.00 %
ITALY	5.00 %
FRANCE	4.00 %

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

Products/services for which there are good market prospects:

1. Rifles
2. Surveillance drones
3. Simulators
4. Sonars
5. NBC equipment
6. Electronic warfare equipment
7. Communication masts

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Competitive pricing
- Strong sectoral capability in Canada
- Bilateral economic trade agreement
- Willingness to offer good industry.
- offset benefits to Dutch

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: HAGUE, THE

Market: NETHERLANDS

Factors for Canadian exports not reaching market potential:

- _____
- _____

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

Activity: Service increasing flow of enquiries from Canadian suppliers to Dutch market.

Expected Results: Increased market share for Canadian products.

Activity: Continue to develop closer contacts with sr. military officials notably procurement & techn. staff in all 3 services.

Expected Results: Improved access for Cdn businessmen to more senior levels

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

Activity: Defence mission to Hague RDP

Expected Results: Increased industry-to-industry collaboration.

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

Activity: Prepare Reseach Development and production steering committee meeting in Canada in 1990

Expected Results: Joint development of new equipment for Cdn & NL forces.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: HAGUE, THE

Market: NETHERLANDS

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	9422.00 \$M	11645.00 \$M	12227.00 \$M	13450.00 \$M
Canadian Exports	61.16 \$M	76.00 \$M	80.00 \$M	1008.00 \$M
Canadian Share of Market	0.65 %	0.65 %	0.65 %	0.75 %

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

Major Competing Countries

Market Share

GERMANY WEST	29.00 %
BELGIUM	13.00 %
UNITED STATES OF AMERICA	12.00 %
UNITED KINGDOM	8.00 %
FRANCE	7.00 %
JAPAN	6.00 %

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

Products/services for which there are good market prospects:

1. Datacom, Hardware
2. Public Datacom switches
3. PABX
4. PC local/wide area networks
5. Computer peripherals
6. Lab. instruments
7. Analytical instruments
8. Computer software
9. Process control instrumentation

Factors contributing to current successful Canadian exports:

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: HAGUE, THE

Market: NETHERLANDS

Factors for Canadian exports not reaching market potential:

- _____
- _____

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

Activity: Prepare/distribute report on Neths market for computer hard-software

Expected Results: Introduce 5 new firms to Dutch market

Activity: Enlarge Embassy directory of importers/distributors (all sub sectors) and visit companies where appropriate.

Expected Results: Identify parties interested in Canadian products

Activity: Prepare/distribute report on Netherlands market for industrial/medical instrumentation.

Expected Results: Introduce 5 new firms to Dutch market.

Activity: Disseminate info on Canadian computing, telecom/datacom and instrumentation products to local importers/distributors.

Expected Results: Locate interest in products "new" to Dutch market

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

Activity: Matchmaker mission to "Het Instrument" May 1990

Expected Results: At least 5 new agencies for Canadian instrumentation prods.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: HAGUE, THE

Market: NETHERLANDS

Sector : FOREST PRODUCTS, EQUIP, SERVICES

Sub-Sector: WOOD AND WOOD PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1925.00 \$M	1460.00 \$M	1533.00 \$M	1610.00 \$M
Canadian Exports	27.00 \$M	24.00 \$M	31.00 \$M	40.00 \$M
Canadian Share of Market	1.40 %	1.60 %	2.00 %	2.50 %

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

Major Competing Countries Market Share

BELGIUM	18.00 %
GERMANY WEST	15.00 %
FINLAND	9.00 %
SWEDEN	8.00 %
UNION OF SOVIET SOC REP	6.00 %
FRANCE	4.00 %

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

Products/services for which there are good market prospects:

1. CLS SPF and similar
2. Hardwood and related products
3. Western Red Cedar
4. Hemlock
5. DIY and semi-manufactured products
6. Douglas Fir
7. Board products especially OSB

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- PEMD support
- Provincial export promotion
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: HAGUE, THE

Market: NETHERLANDS

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Restrictive quotas
- Restrictive standards
- Aggressive pricing by US plywood exp
- Strong competition from competitors

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

Activity: Monitor Dutch authorities views on plant health issues and argue Canadian position as necessary.

Expected Results: Continued access to EC for Canadian softwood lumber

Activity: Support promotional activities of European offices of COFI and BPIB

Expected Results: Introduce new exporters and products to Neths market

Activity: Support local associations of agents, importers in orienting member companies re Canadian lumber availabilities.

Expected Results: Bring about additional trading relationships

Activity: Support visits to Canada by groups of Dutch builders to investigate Canadian TFC technology

Expected Results: Increased use of TFC

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

Activity: Mission of buyers of DIY and building products from Belelux to Canada

Expected Results: Introduce key buyers/importers to Canadian buyers

Activity: Liaise with key local trade publications. Encourage increase in coverage of Canadian products and expertise

Expected Results: Enhanced image of Canada as reliable supplier.

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: HAGUE, THE

Country: NETHERLANDS

The mission reports that the approximate flows to all countries of investment from its country/territory in Canadian \$ is as follows: (including portfolio flows if a primary focus)

	Total (\$ Million)	Canadian Share	Major Competitor Share
Two years ago	0.00	0.00	0.00
One year ago	4620.00	1.50	42.00
Current year	9530.00	1.50	45.00

The mission is of the opinion that Canada can reasonably expect to attract the following amount of foreign investment from its territory/country next year:

Approximately Cdn \$ 100 million excluding portfolio and real estate investments.

Canada's major competitors for investment from this territory/country are:

- USA
- UK
- Belgium/Luxembourg
- Switzerland
- France
- West Germany

The following types of activities are currently being undertaken by Canada's major competitors to attract investment from this territory/country:

- American Chamber of Commerce arranges seminars, lunch meetings.
- U.S. Embassy organizes annual Invest in USA seminar and publishes 24 page newsletter which often highlights incoming delegations from various states seeking Dutch investment.

IDP Partners and related program activities:

- Netherlands/Canada Chamber of Commerce
- Embassy actively supports Chamber which organizes lunches and seminars with Canadian keynote speakers.

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: HAGUE, THE

Country: NETHERLANDS

IDP Partners and related activities cont d:

Govt of Ontario/Paris Office.

- Joint liaison visits with Embassy Investment Counsellor.
Joint promotion.

Govt of Manitoba/Rotterdam office

- Joint liaison visits and promotional activities with Embassy Investment Counsellor

Govt of B.C./London office

- Joint liaison visits and promotion with Embassy Investment counsellor

Govt of Quebec/Brussels office

- Joint promotion with Embassy Investment Counsellor

Canadian regional and municipal economic development commissioners

- Investment Counsellor collaborates directly with numerous commissioners who service potential Dutch investors.

Association of the Mechanical and Electrical Engineering Industries in the Netherlands (FME)

- We will develop closer relationship and encourage them to organise lunch meetings featuring Canadian keynote speakers

Other specialized trade associations

- Use association officers to identify potential leads.

Hague Chamber of Commerce

- Organizes in/outgoing missions and other twinning activities with Ottawa (and Montreal and Toronto).

Govt of Alberta/London office

- Assist Ministry of Economic Development promotional activities in territory

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: HAGUE, THE

Country: NETHERLANDS

Compared to major competitive destinations, Canada is perceived to have the following advantages:

- Canada is a trial market prior to entering USA market.
- Canadian lifestyle and social habits are considered to be closer to Dutch lifestyle/habits than those south of the border.
- Proximity of the large USA market: enhanced access to it following the Free Trade Agreement.

the following constraints:

- USA is still considered THE North American market
- Lack of trained labour
- Breeder's rights (for seed potatoes or example) are not adequately protected in Canada
- Dutch see Canadian industry as lagging behind in technology in a number of sectors, thus limiting their ability to find subcontractors and skilled labour for their factories.

The mission indicates the following potential for various types of investment from within its territory/country:

Type of Investment	Potential
Portfolio	LOW
Acquisition	LOW
Greenfield	LOW
Joint Venture	LOW
Strategic Partnering	LOW
Technology Licensing	LOW

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: HAGUE, THE

Country: NETHERLANDS

The mission believes that the following sectors are of greatest interest to investors in its territory/country an assigned ranking A = High B = Medium C = Low

Sector	Ranking
Agriculture/Food/Fish	C
Resource Processing	C
Machinery and Equipment	C
Transportation	C
Consumer Products	C
Commercial Service	C
Computer and Communications	C
Health Care Products/Medical	C
Aerospace and Defence	C
Strategic Technologies	C

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: HAGUE, THE

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

Seq #

Date

Type: DIRECT MAIL CAMPAIGN

- | | | |
|---|--|-------|
| 3 | <p>Event Description: materials handling equipment, agri-food and environment equipment will be targetted.</p> <p>City :</p> <p>Country :NETHERLANDS</p> <p>Investment Nature:joint venture
tech licensing</p> <p>Investment Sector:MACHINERY/EQUIPMENT</p> <p>Event Cooperants :
ISCT/Invcan/Provinces</p> <p>Estimated Budget : \$2,000.00</p> | 11/90 |
| 2 | <p>Event Description: Dutch providers of advanced tech products and services will be targetted.</p> <p>City :</p> <p>Country :NETHERLANDS</p> <p>Investment Nature:Joint venture
tech licensing</p> <p>Investment Sector:HEALTH CARE PRODUCTS/MEDICAL</p> <p>Event Cooperants :
Invcan/ISTC/Provinces</p> <p>Estimated Budget : \$3,000.00</p> | 09/90 |
| 1 | <p>Event Description: food handling/processing are main targets.</p> <p>City :</p> <p>Country :NETHERLANDS</p> <p>Investment Nature:Joint Venture
Greenfield</p> <p>Investment Sector:AGRICULTURE/FOOD/FISH</p> <p>Event Cooperants :
Invcan/ISTC/Provinces</p> <p>Estimated Budget : \$3,000.00</p> | 04/90 |

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: HAGUE, THE

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

Seq #	Date
Type: LOCAL PUBLICATION	
5	04/90
Event Description: Dutch language brochure to be used in direct mail campaign	
City :	
Country :NETHERLANDS	
Investment Nature:	
Investment Sector:AGRICULTURE/FOOD/FISH	
Event Cooperants :	
Estimated Budget : \$5,000.00	
6	04/90
Event Description: support for publication of the Chamber's directory. support of the Chamber's newsletter.	
City :	
Country :NETHERLANDS	
Investment Nature:	
Investment Sector:AGRICULTURE/FOOD/FISH	
Event Cooperants :	
Netherlands/Canada Chamber of Commerce	
Estimated Budget : \$3,000.00	
Type: OUTCALL PROGRAM	
4	01/91
Event Description: industry liaison with Minister Commercial	
City :	
Country :NETHERLANDS	
Investment Nature:all	
Investment Sector:STRATEGIC TECHNOLOGIES	
Event Cooperants :	
Invcan/Provinces/ISTC	
Estimated Budget : \$2,000.00	

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: HAGUE, THE

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

Seq #	Date
Type: OTHER PROMOTION	
7	04/90
Event Description: support for senior Canadian government visitors and provincial ministers and officials.	
City :	
Country :NETHERLANDS	
Investment Nature:	
Investment Sector:AGRICULTURE/FOOD/FISH	
Event Cooperants :	
Provinces/Invcan/ISTC	
Estimated Budget : \$2,000.00	

Total estimated budget for all proposals: \$20,000.00

DEPARTMENT OF EXTERNAL AFFAIRS

PEMD - Proposed Government Promotional Activities 1990/91

Proposals As Of December 23/89

Post: Hague, The

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Contact</u>
90/04/00	RDP Mission/Defence Programs To The Hague Mission Out, Industry	Defence Programs, Products & Services
90/04/23	Manufacturers To The Instrument Trade Fair, Utrecht, Netherlands Mission Out, Industry	Advanced Tech. Products & Services
90/05/08	Interclean '90 Amsterdam, Netherlands Fair, National Stand	Industrial Machine, Plants & Services D.Adams/H.Schroeter

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: VIENNA

Country: AUSTRIA

Austria's economic upswing has continued during the first half of 1989 following a 4.2% growth rate in 1988 exceeding that of Western Europe for the first time since 1983. Exports expanded in 1988 by close to 10%, a recovery over 1987 sustained primarily by foreign demand and followed by another spurt early this year. (estimate for 1989 + 15%). Exports to Canada for the first 6 months increased 37% while imports from Canada increased 30%. During 1988 and the current year, consumer expenditures picked up (estimate 1989 + 3.7%) in the wake of a national tax reform as of January 1, 1989. Austria's labour market showed some signs of tightening. After the unusually high employment gains due to the mild weather in winter, increased slowed down; however, the 1989 unemployment rate should remain below the 5% level with a sharp climb of unfilled vacancies indicating a shrinking labour force.

Economic growth has been revised upward to 3.5% for 1989 and 2.5% for 1990. Inflation is also increasing but does not yet pose a serious problem. Forecasts have been revised upward to about 3% for 1989.

Although relatively small in size, Austria is a modern industrialized country ranking among the upper third of all such countries in terms of GDP/capita. Austria's exports account for approximately 38% of GNP. A major aim of Austrian national economic policy is the "internationalization" of the economy through a variety of interconnected activities beyond the national and regional borders. For example, Austrian industry actively pursues joint-ventures, turnkey projects, contractual cooperation, technology and know-how transfers, consulting and management agreements and licensing agreements with enterprises in foreign countries. Thus, the Post's 1990-91 activities will continue to focus on technology transfers, investments, joint-ventures and licensing agreements which lead to job-creation and increased international competitiveness of Canadian goods and services.

As regards both trade and investment, Austria will be focusing increasingly on "Europe 1992" (pursuant to its application to join the EC) and on Eastern Europe (particularly Hungary) where recent political and economic events have already begun to have an impact on Austrian economic activities. The challenge for Canada will be not only to maintain high visibility during this "Europe-oriented" phase of Austria's economic evolution but also to take advantage of opportunities to enter into cooperative business arrangements with Austrian firms in third country markets. We will be studying and actively pursuing such opportunities during the forthcoming year.

Although many Canadian products are well-established on the Austrian market and require mainly responsive actions, we will be particularly active in a number of "niche" product areas ranging from specialty fish and food items to sophisticated computer and telecom products and services. Many of our activities will continue to be undertaken in close cooperation with the Federal Economic Chamber and we intend to capitalize on the very positive economic outlook for Austria for the next few years.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 EXPORT PROMOTION PRIORITIES

Mission: VIENNA

Country: AUSTRIA

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

1. **ADVANCED TECH. PROD. & SERV**
Austria has developed a growing appreciation of Canadian high-technology capability and considerable further opportunities exist, particularly in computer technology and telecommunications products and services.
2. **FISHERIES, SEA PRODUCTS & SERV.**
Potential market for fish products is excellent and provide opportunities for a variety of specialty fish products. Market is currently under-exploited by Canadian firms.
3. **AGRI & FOOD PRODUCTS & SERVICE**
Although the Canadian market share is relatively small, certain products represent a significant share of the market, e.g. maple syrup, vegetable; the Austrian market has yet to be fully exploited by Canadian firms.
4. **TRANSPORT SYS, EQUIP, COMP, SERV.**
There is continuing Austrian interest in Canadian aircraft (Dash-8, Challenger 600).

5.

6.

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

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: VIENNA

Market: AUSTRIA

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: SEMI & PROCESSED FOOD & DRINK

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	2238.00 \$M	2323.00 \$M	2450.00 \$M	2550.00 \$M
Canadian Exports	3.80 \$M	4.20 \$M	4.50 \$M	5.00 \$M
Canadian Share of Market	0.17 %	0.18 %	0.19 %	0.20 %

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

Major Competing Countries

Market Share

EUROPEAN COMMON MARKET C	52.00 %
OTHER COUNTRIES	21.00 %
HUNGARY	5.00 %
POLAND	4.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. Maple syrup
2. Honey
3. Food specialties
4. Vegetables

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- _____
- _____

04/12/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: VIENNA

Market: AUSTRIA

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

Activity: Contacts with Austrian food importers intensified
Expected Results: Increase in export performance

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

Activity: Stimulate Austrian attendance at Canadian exhibit at ANUGA and SIAL
Expected Results: Increase in contacts and sales

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: VIENNA

Market: AUSTRIA

Sector : FISHERIES, SEA PRODUCTS & SERV.

Sub-Sector: FISH & SHELLFISH & OTHER PROD

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	129.00 \$M	121.00 \$M	130.00 \$M	135.00 \$M
Canadian Exports	3.00 \$M	4.00 \$M	5.00 \$M	6.00 \$M
Canadian Share of Market	2.30 %	3.30 %	3.80 %	4.40 %

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

Major Competing Countries

Market Share

EUROPEAN COMMON MARKET C	61.00 %
NORWAY	8.00 %
SWEDEN	7.00 %
EUROPE	2.00 %

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

Products/services for which there are good market prospects:

1. Crustaceans
2. Smoked fish
3. Saltwater fish (other than hering)
4. Ketar caviar
5. Trout, smoked
6. Freshwater fish

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- _____
- _____

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: VIENNA

Market: AUSTRIA

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

- Activity: Canvass further Austrian fish product manufacturers and importers
Expected Results: Incr aware's about Cdn supp potential & conseq incr in sales
- Activity: Provide again update directories of Canadian fish traders to Austrian industry/trade
Expected Results: Incr aware's about Cdn supp potential & conseq incr in sales

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

- Activity: Endeavour to increase awareness of Austrian traders in this sector about Canadian exhibit at ANUGA and SIAL
Expected Results: Increase in sales

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: VIENNA

Market: AUSTRIA

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: COMPUTERS HARD/SOFTWARE & COMP

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1160.00 \$M	1490.00 \$M	1600.00 \$M	1800.00 \$M
Canadian Exports	10.10 \$M	17.50 \$M	20.00 \$M	24.00 \$M
Canadian Share of Market	0.90 %	1.20 %	1.30 %	1.40 %

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

Major Competing Countries

Market Share

EUROPEAN COMMON MARKET C	45.00 %
UNITED STATES OF AMERICA	21.00 %
JAPAN	17.00 %

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

Products/services for which there are good market prospects:

1. Mini computers
2. Computer parts
3. Software

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- _____
- _____

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: VIENNA

Market: AUSTRIA

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

Activity: Continuation of contacts with major Austrian organizations and companies in this sector
Expected Results: Export potential further improved

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

Activity: Intensified further follow-up as a result of Informatics Mission
Expected Results: Incr sales, ext of coop eff incl ventures & joint research

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: VIENNA

Market: AUSTRIA

Sector : TRANSPORT SYS, EQUIP, COMP, SERV.

Sub-Sector: AEROSPACE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	291.00 \$M	253.00 \$M	260.00 \$M	300.00 \$M
Canadian Exports	14.00 \$M	14.00 \$M	15.00 \$M	16.00 \$M
Canadian Share of Market	0.50 %	0.60 %	0.60 %	0.60 %

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

Major Competing Countries

Market Share

EUROPEAN COMMON MARKET C	61.00 %
UNITED STATES OF AMERICA	22.00 %

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

Products/services for which there are good market prospects:

1. Aircraft
2. Spare parts for aircraft

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Austr mkt relat'y small therefore
- almost hand tail'd sales eff needed

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: VIENNA

Market: AUSTRIA

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

Activity: Assist Canadian manufacturers (DeHavilland/Canadair) with their sales efforts
Expected Results: Possible purchases additional DASH-8 by 2 private airlines

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

Activity: To monitor Canadian participation at International Air Shows incl. Abbotsford
Expected Results: Incr awareness in Austria of Cdn capabilities in this sector

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: VIENNA

Country: AUSTRIA

The mission reports that the approximate flows to all countries of investment from its country/territory in Canadian \$ is as follows: (including portfolio flows if a primary focus)

	Total (\$ Million)	Canadian Share	Major Competitor Share
Two years ago	460.00	2.50	40.00
One year ago	500.00	3.00	41.00
Current year	550.00	3.00	40.00

The mission is of the opinion that Canada can reasonably expect to attract the following amount of foreign investment from its territory/country next year:

Although Austrian investments abroad are still considerably below int'l average (Austria is a net capital importer), they will continue to incr, particularly w/the opening of E. European economies. Invest in Cda could exceed \$50 mill. in 1990 due to aluminum invest proj in Sept-Iles, Quebec

Canada's major competitors for investment from this territory/country are:

- F.R. Germany
- Switzerland and Liechtenstein
- U.S.A.
- Eastern Europe

The following types of activities are currently being undertaken by Canada's major competitors to attract investment from this territory/country:

- FRG/Austria have relationship similar to Cda/USA. No major promotion. Swiss tax and fiscal policies are major factors. USA market size is major factor. Political changes in East Europe will attract Austrian investment.

IDP Partners and related program activities:

- Austria Metall Ag (AMAG)
 - Aluminum smelter investment

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: VIENNA

Country: AUSTRIA

IDP Partners and related activities cont d:

Doppelmayer Gmbh

- Investment in cable ways/chair lifts

Hofmann Kunststoffverpackungen

- Plastic pails investment

OMV AG

- Investment in oil exploitation

Praher Gmbh

- Investment in plastic pipes and pumps

Compared to major competitive destinations, Canada is perceived to have the following advantages:

- Economic and political stability.
- Access to North American market.
- Low energy costs.
- Raw material availability.
- Skilled labour force.

the following constraints:

- Canadian industrial potential is not as well known as that of competitor countries.
- Relatively small domestic market.

The mission indicates the following potential for various types of investment from within its territory/country:

Type of Investment	Potential
Portfolio	LOW
Acquisition	MEDIUM
Greenfield	MEDIUM
Joint Venture	HIGH
Strategic Partnering	MEDIUM
Technology Licensing	HIGH

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: VIENNA

Country: AUSTRIA

The mission believes that the following sectors are of greatest interest to investors in its territory/country an assigned ranking A = High B = Medium C = Low

Sector	Ranking
Agriculture/Food/Fish	C
Resource Processing	B
Machinery and Equipment	A
Transportation	B
Consumer Products	C
Commercial Service	B
Computer and Communications	C
Health Care Products/Medical	C
Aerospace and Defence	C
Strategic Technologies	A

RPTD2 TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: VIENNA

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

Seq #	Date
Type: SEMINAR, ABROAD	
3	10/90
Event Description: round table discussions with potential investors	
City :Vienna	
Country :AUSTRIA	
Investment Nature:acquisition greenfield, J/V strategic partn	
Investment Sector:STRATEGIC TECHNOLOGIES	
Event Cooperants : Canadian provinces	
Estimated Budget : \$200.00	
2	10/90
Event Description: round table discussions with potential investors	
City :Klagenfurt	
Country :AUSTRIA	
Investment Nature:acquisition greenfield, J/V strategic partn	
Investment Sector:MACHINERY/EQUIPMENT	
Event Cooperants : Canadian provinces	
Estimated Budget : \$800.00	
1	10/90
Event Description: round table discussions with potential investors	
City :Graz	
Country :AUSTRIA	
Investment Nature:acquisition greenfield, J/V strategic partn	
Investment Sector:MACHINERY/EQUIPMENT	
Event Cooperants : Canadian provinces	
Estimated Budget : \$800.00	

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: VIENNA

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

Seq #	Date
Type: DIRECT MAIL CAMPAIGN	
7	09/90
Event Description:	
approach approx. 500 Austrian companies re potential investment in Cda	
City	:all provinces
Country	:AUSTRIA
Investment Nature:	all types
Investment Sector:	MULTIPLE INVESTMENT SECTORS
Event Cooperants :	
Estimated Budget :	\$1,000.00
Type: OUTCALL PROGRAM	
4	11/90
Event Description:	
direct approach to potential Austrian investors	
City	:Salzburg
Country	:AUSTRIA
Investment Nature:	acquisition greenfield, J/V strategic partn
Investment Sector:	MACHINERY/EQUIPMENT
Event Cooperants :	Industry Association
Estimated Budget :	\$600.00
5	05/90
Event Description:	
direct approach to potential Austrian investors	
City	:Linz
Country	:AUSTRIA
Investment Nature:	acquisition greenfield, J/V strategic partn
Investment Sector:	RESOURCE PROCESSING
Event Cooperants :	Provincial Chamber
Estimated Budget :	\$600.00

RPTD2 TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: VIENNA

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

Seq #		Date
	Type: OUTCALL PROGRAM	
6	Event Description: direct approach to potential Austrian investors	06/90
	City :Innsbruck	
	Country :AUSTRIA	
	Investment Nature:acquisition greenfield, J/V strategic partn	
	Investment Sector: MULTIPLE INVESTMENT SECTORS	
	Event Cooperants :	
	Ind. Assoc. & Provincial Chamber	
	Estimated Budget : \$700.00	

Total estimated budget for all proposals: \$4,700.00

DEPARTMENT OF EXTERNAL AFFAIRS

PEMD - Proposed Government Promotional Activities 1990/91

Proposals As Of December 23/89

Post: Vienna

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Contact</u>
90/05/00	Automatic Manufacturing Mission To Austria Mission Out, Industry	Advanced Tech.Products & Services
90/06/00	Fish Mission To Austria Mission Out, Industry	Fisheries,Sea Products & Services
91/01/00	Food Products Mission To Austria Mission Out, Industry	Agri & Food Products & Services



