

CA1
EA
S18
1990
Jan.
DOCS

External Affairs and
International Trade Canada

Affaires extérieures et
Commerce extérieur Canada

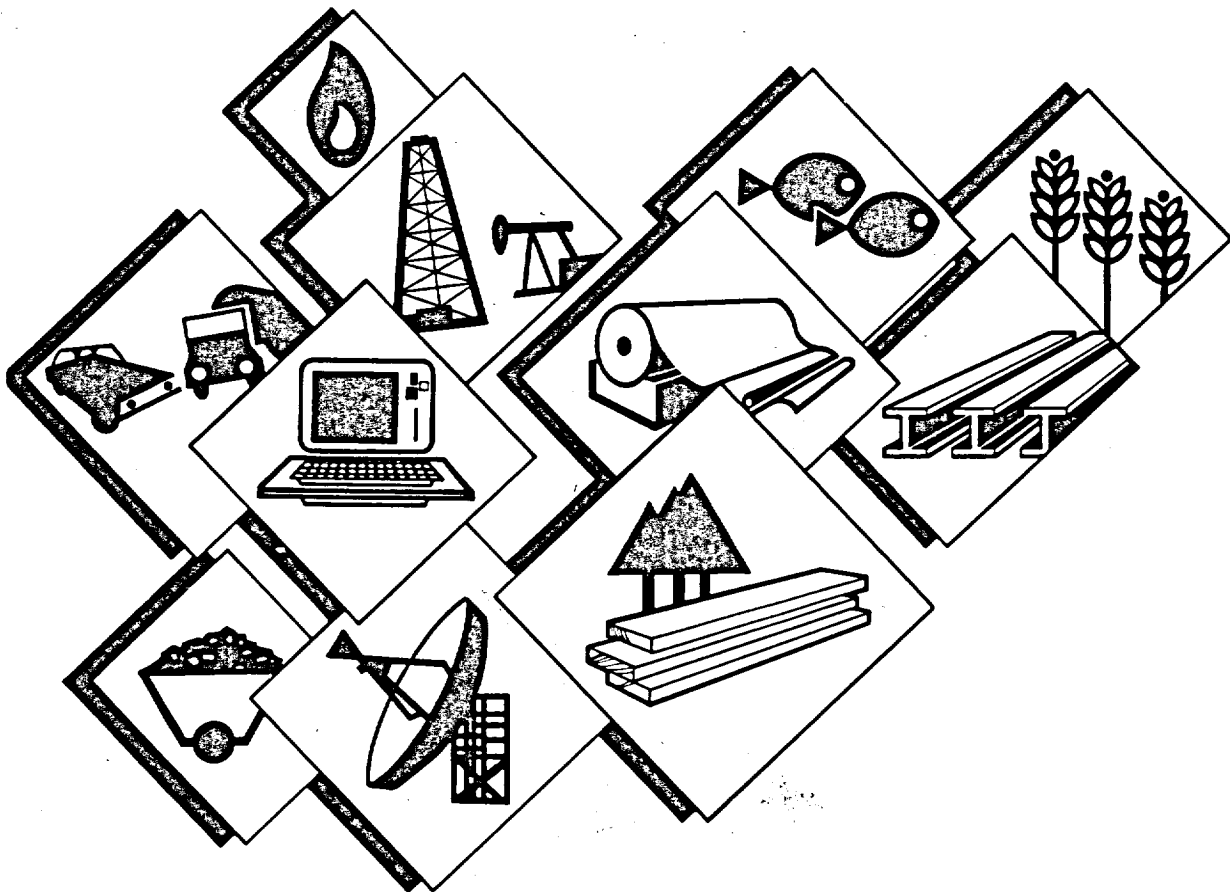
b 2303267 (e) 5

DRAFT

**SECTORIAL SYNOPSIS
FOR CONSULTATION PURPOSES ONLY**

CONSULTING AND OTHER SERVICES

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



JANUARY 1990

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

FOREWORD

This report contains a summary of the highlights of the proposed work plans of the export and investment promotion program of Canadian diplomatic missions 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 and investment promotion the means to identify quickly the key components of the trade program of External Affairs missions and access conveniently those features of the plans which are pertinent to their specific interests.

Similar synopses are available in the form of separate books for each of 17 sectors. For each sector the book lists the markets where the sector is identified as a priority for the post or is considered important for other reasons e.g. a key export). Profiles of each listed sector or subsector are provided by geographic region and country. They contain a variety of market data, trade opportunities and approved promotional projects. Data and recommendations contained in these reports will be reviewed by the provinces, other government departments and by the various geographic and functional bureaux in External Affairs before being finalized.

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

The computerized planning system from which this report was produced was developed by the Department of External Affairs to facilitate the assembly of vast amounts of detailed information on world markets from some 100 missions abroad. It is programmed to make this information available to the private sector, the Provinces and other departments of government in a format which would enable specific data on sectors or geographic regions to be accessed conveniently.

In their Conference on the Economy held in Regina in 1985, First Ministers noted the major contribution made by the export sector to Canada's national income yet expressed concern at the decline of Canada's share of world exports.

NON - CIRCULATING !
CONSULTEZ SUR PLACE

Dept. of External Affairs
Min. des Affaires extérieures

APR 3 1990

RETURN TO DEPARTMENTAL LIBRARY
RETOURNER A LA BIBLIOTHEQUE DU MINISTERE

40-255-716

To meet this challenge, First Ministers endorsed the need to generate widespread support for a new trade strategy for Canada which would embody three principal elements:

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

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

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

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

A last word on statistics. The statistical information contained in this synopsis is to be considered as an attempt on the part of the Trade Commissioners abroad to estimate the order or magnitude of market size, market shares, and possible export potential. Users of this synopsis are cautioned that these figures are in many cases best guesses based on discussions with trade sources. In many markets reliable published statistics are simply not available. However, in an attempt to provide exporters with notional ideas of market figures, 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 Sector/Sub-Sector Highlights

TABLE OF CONTENTS

CONSULTING AND OTHER SERVICES

	<u>PAGE</u>
Nairobi	1
Cairo	19
Tehran	21
Riyadh	26
Libreville	28
Prague	31
Santiago	41

08/01/90

DEPARTMENT OF EXTERNAL AFFAIRS

PAGE: 1

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 CONSULTING SERVICES SUB-SECTOR HIGHLIGHTS

Mission: NAIROBI

Market: KENYA

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: SERVICES INCLUDING CONSULTING

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

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

Major Competing Countries

Market Share

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

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

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

Factors contributing to current successful Canadian exports:

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

08/01/90

DEPARTMENT OF EXTERNAL AFFAIRS

PAGE: 2

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NAIROBI

Market: KENYA

Factors for Canadian exports not reaching market potential:

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

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

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

Expected Results: Increased sales

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

Expected Results: Increased exposure and possible sales/joint ventures

08/01/90

DEPARTMENT OF EXTERNAL AFFAIRS

PAGE: 3

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NAIROBI

Market: KENYA

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

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

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

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

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 CONSULTING SERVICES SUB-SECTOR HIGHLIGHTS

Mission: NAIROBI

Market: UGANDA

Sector : POWER & ENERGY EQUIP. & SERV.

Sub-Sector: CONSULTING & OTHER SERVICES

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	0.00 \$M	0.00 \$M	0.00 \$M	0.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.00 \$M	0.50 \$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 KINGDOM	0.00 %
GERMANY WEST	0.00 %

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

Products/services for which there are good market prospects:

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

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

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

08/01/90

DEPARTMENT OF EXTERNAL AFFAIRS

PAGE: 5

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NAIROBI

Market: UGANDA

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

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

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

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

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 CONSULTING SERVICES SUB-SECTOR HIGHLIGHTS

Mission: NAIROBI

Market: TANZANIA

Sector : POWER & ENERGY EQUIP. & SERV.

Sub-Sector: CONSULTING & OTHER SERVICES

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	0.00 \$M	0.00 \$M	0.00 \$M	0.00 \$M
Canadian Exports	0.00 \$M	1.30 \$M	1.50 \$M	2.00 \$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: 3-5 \$M

Major Competing Countries	Market Share
UNITED KINGDOM	0.00 %
JAPAN	0.00 %
GERMANY WEST	0.00 %

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

Products/services for which there are good market prospects:

1. Consulting services
2. Generation and transmission equipment

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Market prospects have not been adequately explored
- _____
- _____

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 CONSULTING SERVICES SUB-SECTOR HIGHLIGHTS

Mission: NAIROBI

Market: UGANDA

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: CONSULTING & OTHER SERVICES

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	0.00 \$M	0.00 \$M	0.00 \$M	0.00 \$M
Canadian Exports	0.00 \$M	0.20 \$M	0.20 \$M	0.30 \$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
ITALY	0.00 %
DENMARK	0.00 %
UNITED KINGDOM	0.00 %
GERMANY WEST	0.00 %

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

Products/services for which there are good market prospects:

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

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

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

08/01/90

DEPARTMENT OF EXTERNAL AFFAIRS

PAGE: 9

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NAIROBI

Market: UGANDA

- _____
- _____

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

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

Expected Results: Possible contracts under AfDB or IBRD financing

ar
ed)

\$M
\$M
%

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 CONSULTING SERVICES SUB-SECTOR HIGHLIGHTS

Mission: NAIROBI

Market: TANZANIA

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: CONSULTING & OTHER SERVICES

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	0.00 \$M	0.00 \$M	0.00 \$M	0.00 \$M
Canadian Exports	4.50 \$M	6.40 \$M	6.50 \$M	7.00 \$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
EUROPEAN COMMON MARKET C	0.00 %
SCANDINAVIA	0.00 %

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

Products/services for which there are good market prospects:

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

Factors contributing to current successful Canadian exports:

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

08/01/90

DEPARTMENT OF EXTERNAL AFFAIRS

PAGE: 11

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NAIROBI

Market: TANZANIA

Factors for Canadian exports not reaching market potential:

- IFI projects not pursued

-

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

Activity: General market survey to be undertaken

Expected Results: Identify opportunities that should be pursued by firms.

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

Ports Modernization

Tanz. Harbours Auth. (THA)

Approximate Value: 30 M\$

Financing Source : IDA - World Bank

Contact : Cdn High Commission, Nairobi
or telex THA 413-46 in Dar

Roads I - Rehab Program

Ministry of Transport

Approximate Value: 15 M\$

Financing Source : IDA - World Bank

Contact : Cdn High Commission, Nairobi
tlx 22198 DOMCAN

Integrated Roads Project

Ministry Communications & Works

Approximate Value: 816 M\$

Financing Source : AFDB - African Devlpmt Bank

Contact : Cdn High Commission, Nairobi
tlx 22198 DOMCAN

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 CONSULTING SERVICES SUB-SECTOR HIGHLIGHTS

Mission: NAIROBI

Market: TANZANIA

Sector : OIL & GAS EQUIPMENT, SERVICES

Sub-Sector: SERVICES INCLUDING CONSULTING

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	0.00 \$M	0.00 \$M	0.00 \$M	0.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.40 \$M	0.40 \$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
ITALY	0.00 %

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

Products/services for which there are good market prospects:

1. consulting services
2. pipeline equipment

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Market prospects have not been adequately explored
- _____
- _____

08/01/90

DEPARTMENT OF EXTERNAL AFFAIRS

PAGE: 13

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NAIROBI

Market: TANZANIA

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

Petroleum Rehab Project

Approximate Value: 30 M\$

Min Mineral Resources&Energy

Financing Source : IDA - World Bank

Contact

: Cdn High Commission, Nairobi

Tlx 22198 DOMCAN

ir
ed)

\$M
\$M
%

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 CONSULTING SERVICES SUB-SECTOR HIGHLIGHTS

Mission: NAIROBI

Market: KENYA

Sector : OIL & GAS EQUIPMENT, SERVICES

Sub-Sector: SERVICES INCLUDING CONSULTING

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

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

Major Competing Countries Market Share

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

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

Products/services for which there are good market prospects:

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

Factors contributing to current successful Canadian exports:

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

08/01/90

DEPARTMENT OF EXTERNAL AFFAIRS

PAGE: 15

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NAIROBI

Market: KENYA

Factors for Canadian exports not reaching market potential:

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

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

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

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

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

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

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 CONSULTING SERVICES SUB-SECTOR HIGHLIGHTS

Mission: NAIROBI

Market: UGANDA

Sector : EDUCATION, MEDICAL, HEALTH PROD

Sub-Sector: SERVICES INCLUDING CONSULTING

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

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

Major Competing Countries

Market Share

DENMARK	0.00 %
JAPAN	0.00 %
UNITED KINGDOM	0.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

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

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

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

08/01/90

DEPARTMENT OF EXTERNAL AFFAIRS

PAGE: 17

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NAIROBI

Market: UGANDA

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

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

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

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

08/01/90

DEPARTMENT OF EXTERNAL AFFAIRS

PAGE: 18

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NAIROBI

Market: UGANDA

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

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

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 CONSULTING SERVICES SUB-SECTOR HIGHLIGHTS

Mission: CAIRO

Market: ARAB REPUBLIC OF EGYPT

Sector : OIL & GAS EQUIPMENT, SERVICES

Sub-Sector: SERVICES INCLUDING CONSULTING

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	175.00 \$M	195.00 \$M	207.00 \$M	215.00 \$M
Canadian Exports	0.00 \$M	0.30 \$M	1.00 \$M	0.15 \$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	60.00 %
ITALY	15.00 %
FRANCE	7.00 %
ENGLAND	8.00 %

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

Products/services for which there are good market prospects:

1. CORROSION PREVENTION EQUIPMENT
2. WELL STIMULATOR ADDITIVES
3. SCADA SYSTEMS
4. TUBES, CASINGS
5. DRILLING & COMPLETION TOOLS
6. MEASURING INSTRUMENTS
7. RIG & PRODUCTION COMPONENTS
8. SEISMIC/GEOLOGICAL EQUIPMENT

Factors contributing to current successful Canadian exports:

- Import restrictions are not a impediment in this sector

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: CAIRO

Market: ARAB REPUBLIC OF EGYPT

- Non-competitive financing
- 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: COMPLETE MARKET SURVEY OF SELF FINANCED REQUIREMENTS
Expected Results: BETTER IDENTIFY & PURSUE PROSPECTS

Activity: FOLLOW-UP ON PORT-SAID & SHUKAIR PIPELINE PROJECTS
Expected Results: INTRODUCE CDN SUPPLIERS TO BID

Activity: CONTINUE TO FLAG NEW OIL/GAS CONCESSION BID ROUNDS
Expected Results: STIMULATE MORE ACTIVE CDN PARTICIPATION IN MARKET

Activity: ASSIST "ECOLE DES HAUTES ETUDES COMMERCIALES" RECRUITMENT OF EGYPTIANS
Expected Results: EXPAND PROMOTION OF CDN PETROLEUM MGMT EXPERTISE

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

Activity: INCOMING VISITORS TO NPS 90
Expected Results: BETTER UNDERSTANDING 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: PARTICIPATE IN ON LINE TRAPETCO BULLETIN BOARD
Expected Results: MORE EFFECTIVE PROMOTION OF CDN OPPORTUNITIES TO LOCAL COYS

Activity: CLOSURE LIAISON WITH GULF CANADA
Expected Results: PROMOTE CDN SUPPLIERS TO CDN EXPLORATION CO NOW ACTIVE

Activity: CAIRO OFFICER TO CALL UPON ALBERTA BASED OIL/GAS UNDRUSTRY
Expected Results: STIMULATE MARKET INITIATIVE FROM CANADA

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 CONSULTING SERVICES SUB-SECTOR HIGHLIGHTS

Mission: TEHRAN

Market: IRAN

Sector : POWER & ENERGY EQUIP. & SERV.

Sub-Sector: CONSULTING & OTHER SERVICES

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	10.00 \$M	12.00 \$M	15.00 \$M	25.00 \$M
Canadian Exports	0.50 \$M	1.00 \$M	1.50 \$M	4.00 \$M
Canadian Share of Market	5.00 %	8.30 %	10.00 %	16.00 %

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

Major Competing Countries

Market Share

SWEDEN	60.00 %
PEOPLE'S REP OF CHINA	6.70 %
YUGOSLAVIA	3.30 %
ROMANIA	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. Hydropower consulting
2. Thermal power consulting
3. Transmission consulting

Factors contributing to current successful Canadian exports:

- Import restrictions are not a impediment in this sector
- Aggressive marketing
- Competitive pricing
- Strong sectoral capability in Canada
- Exporters willing to invest/joint venture in territory
- Persistence in market

Factors for Canadian exports not reaching market potential:

- Market prospects have not been adequately explored

08/01/90

DEPARTMENT OF EXTERNAL AFFAIRS

PAGE: 22

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: TEHRAN

Market: IRAN

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

Karkheh River Project

Approximate Value: 20 M\$

Financing Source : NFR - No external funding req'd

Contact : Canadian Embassy, Tehran

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 CONSULTING SERVICES SUB-SECTOR HIGHLIGHTS

Mission: TEHRAN

Market: IRAN

Sector : MINE, METAL, MINERAL PROD & SRV

Sub-Sector: CONSULTING & OTHER SERVICES

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	3.00 \$M	4.00 \$M	8.00 \$M	12.00 \$M
Canadian Exports	0.00 \$M	0.50 \$M	1.00 \$M	2.00 \$M
Canadian Share of Market	0.00 %	12.50 %	12.50 %	16.70 %

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

Major Competing Countries	Market Share
SWEDEN	25.00 %
ITALY	20.00 %
UNION OF SOVIET SOC REP	15.00 %

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

Products/services for which there are good market prospects:

1. Ferrous metals
2. Non-ferrous metals
3. Steel industry

Factors contributing to current successful Canadian exports:

- Import restrictions are not a impediment in this sector
- Aggressive marketing
- Strong sectoral capability in Canada
- Exporters willing to invest/joint venture in territory

Factors for Canadian exports not reaching market potential:

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

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 CONSULTING SERVICES SUB-SECTOR HIGHLIGHTS

Mission: TEHRAN

Market: IRAN

Sector : OIL & GAS EQUIPMENT, SERVICES

Sub-Sector: SERVICES INCLUDING CONSULTING

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	20.00 \$M	30.00 \$M	40.00 \$M	100.00 \$M
Canadian Exports	0.00 \$M	2.00 \$M	3.00 \$M	10.00 \$M
Canadian Share of Market	0.00 %	6.70 %	7.50 %	10.00 %

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

Major Competing Countries

Market Share

FRANCE	25.00 %
SINGAPORE	5.00 %

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

Products/services for which there are good market prospects:

1. Contract Drilling Services
2. Seismic Crews and Data Interpretations Services
3. Logging Services
4. Training Services

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

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

08/01/90

DEPARTMENT OF EXTERNAL AFFAIRS

PAGE: 25

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: TEHRAN

Market: IRAN

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

Activity: National Petroleum Show - Incoming Mission
Expected Results: Interest 10 companies to register and visit Iran

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

Activity: Iran Oil and Gas Trade Fair Dec91 (Alberta Economic Development and Trade - tentative)
Expected Results: Develop opportunities for Cdn service contractors

Activity: Iran Oil and Gas Trade Fair Dec91 (Alberta Economic Development and Trade - tentative)
Expected Results: Develop opportunities for Cdn service contractors

Activity: National Petroleum Show Incoming Mission for Senior Iranian Officials JUN92
Expected Results: Provide overview of Cdn capabilities in sector

Activity: Outgoing Seminar from Canada Specializing in Exploration, Production, and Related Services JUN91 (Alberta)
Expected Results: Cement working level contacts to develop specific projects

08/01/90

DEPARTMENT OF EXTERNAL AFFAIRS

PAGE: 26

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 CONSULTING SERVICES SUB-SECTOR HIGHLIGHTS

Mission: RIYADH

Market: SAUDI ARABIA

Sector : EDUCATION, MEDICAL, HEALTH PROD

Sub-Sector: SERVICES INCLUDING CONSULTING

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	582.00 \$M	500.00 \$M	477.00 \$M	450.00 \$M
Canadian Exports	9.00 \$M	9.00 \$M	10.00 \$M	10.00 \$M
Canadian Share of Market	1.50 %	1.80 %	2.10 %	2.30 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	32.00 %
UNITED KINGDOM	22.00 %
AUSTRIA	10.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. HOSPITAL MANAGEMENT
2. LABORATORY MANAGEMENT
3. O & M

Factors contributing to current successful Canadian exports:

- Import restrictions are not a impediment in this sector
- Aggressive marketing
- PEMD support
- Provincial export promotion
- Competitive pricing
- Exporters willing to invest/joint venture in territory

Factors for Canadian exports not reaching market potential:

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

08/01/90

DEPARTMENT OF EXTERNAL AFFAIRS

PAGE: 27

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: RIYADH

Market: SAUDI ARABIA

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

Activity: TO ASSIST A NEWLY ESTABLISHED SAUDI-CANADIAN J.V. TO OBTAIN HOSPITAL MANAGEMENT CONTRACTS

Expected Results: 1 CONTRACT

Activity: TO ASSIST IN CONCLUSION OF NEW SAUDI-CANADIAN J.V. FOR HOSPITAL MANAGEMENT

Expected Results: 1 JOINT VENTURE

Activity: TO FOLLOW-UP ON TENDERS ISSUED BY HOSPITALS FOR MANAGEMENT

Expected Results: 1 CONTRACT

Activity: TO ASSIST CANADIAN COMPANIES IN CONCLUDING TRAINING PROPOSALS.

Expected Results: 2 CONTRACTS

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 CONSULTING SERVICES SUB-SECTOR HIGHLIGHTS

Mission: LIBREVILLE

Market: GABON

Sector : INDUSTRIAL MACHIN, PLANTS, SERV.

Sub-Sector: SERVICES INCLUDING CONSULTING

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	0.00 \$M	2.00 \$M	20.00 \$M	25.00 \$M
Canadian Exports	0.00 \$M	0.40 \$M	4.00 \$M	5.00 \$M
Canadian Share of Market	0.00 %	25.00 %	20.00 %	20.00 %

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

Major Competing Countries	Market Share
FRANCE	65.00 %
BELGIUM	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. Expertise en management/appareil gouvernemental

Factors contributing to current successful Canadian exports:

- Import restrictions are not a impediment in this sector
- Aggressive marketing
- Provincial export promotion
- CIDA programs
- Programme d'ajustement

Factors for Canadian exports not reaching market potential:

- _____
- _____

08/01/90

DEPARTMENT OF EXTERNAL AFFAIRS

PAGE: 29

RPTC3 TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LIBREVILLE

Market: GABON

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

Activity: Appuyer la société canadienne impliquée dans la restructuration de l'Office du Chemin de fer Transgabonais (OCTRA)
Expected Results: Augmenter les chances de succès de la restruct'n de l'OCTRA

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

Activity: Identification des Audits/Diagnostic à réaliser.
Expected Results: Recours par le Gabon, restructur'n sect. publics/para-publ.

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

Plusieurs projets de restructuration qui restent à définir Approximate Value: 0 M\$
Financing Source : AFDB - African Devlpmt Bank
IBRD - World Bank
EDC - Export Dev Corporation

Contact :

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 CONSULTING SERVICES SUB-SECTOR HIGHLIGHTS

Mission: PRAGUE

Market: CZECHOSLOVAKIA

Sector : FOREST PRODUCTS, EQUIP, SERVICES

Sub-Sector: CONSULTING & OTHER SERVICES

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	18.00 \$M	22.00 \$M	27.00 \$M	33.00 \$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
CZECHOSLOVAKIA	33.00 %
AUSTRIA	20.00 %
GERMANY WEST	20.00 %
POLAND	10.00 %
SWEDEN	10.00 %
FINLAND	7.00 %

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

Products/services for which there are good market prospects:

1. Pre-fab. houses: design, mfrg, techn, know-how
2. Recovery boiler technology
3. Pulp mill evaporator and know-how technology
4. Technol. and know-how for oxygen bleaching of pulp

Factors contributing to current successful Canadian exports:

- Import restrictions are not a impediment in this sector

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

RPTC3 TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PRAGUE Market: CZECHOSLOVAKIA

- 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: Support Combustion Engineering in development of cooper. agreement for recovery boilers production
Expected Results: Conclusion of coop. agr. with 1st. Brno Engineering Works
- Activity: Support Ecodyne in development of cooperation agreement for evaporators production
Expected Results: Conclusion of coop. agr. with 1st Brno Engineering Works

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

- Activity: Brno International Engineering Fair in 1990
Expected Results: To bring some Canadian companies as co-exhibitors

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 Technical Mission on Prefabricated House Technologies and Know-How, 1990
Expected Results: Acquaint Czechoslovak experts with Canadian capability

08/01/90

DEPARTMENT OF EXTERNAL AFFAIRS

PAGE: 33

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PRAGUE

Market: CZECHOSLOVAKIA

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

Oxygen Bleach.of Pulp and PGW	Approximate Value:	10 M\$
	Financing Source :	EDC - Export Dev Corporation DOM - Domestically funded
	Contact	: Canadian Embassy, Prague

08,

RP

Mi

Se

Sub

Cun
CDN

Maj

Cun
exp

Pro

Fa

Fa

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 CONSULTING SERVICES SUB-SECTOR HIGHLIGHTS

Mission: PRAGUE

Market: CZECHOSLOVAKIA

Sector : MINE, METAL, MINERAL PROD & SRV

Sub-Sector: CONSULTING & OTHER SERVICES

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	120.00 \$M	150.00 \$M	160.00 \$M	160.00 \$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

CZECHOSLOVAKIA	30.00 %
GERMANY WEST	20.00 %
EAST GERMANY	20.00 %
POLAND	10.00 %
UNION OF SOVIET SOC REP	10.00 %
BULGARIA	10.00 %

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

Products/services for which there are good market prospects:

1. Coil Box Technology
2. Water Cooled Electrodes Technology
3. Continual Casting Technology
4. Laser Technologies
5. Welding Technologies

Factors contributing to current successful Canadian exports:

- Import restrictions are not a impediment in this sector

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

08/01/90

DEPARTMENT OF EXTERNAL AFFAIRS

PAGE: 35

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PRAGUE

Market: CZECHOSLOVAKIA

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

Activity: Support Stelco in their effort to sell Coil Box Technology to NHKG, Ostrava

Expected Results: Start of commercial negotiations in 1990

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

Activity: International Engineering Fair, Brno

Expected Results: Participation of Cdn.Cos. to increase their profile in CSSR

08/

RPT

Mis

Sec

Sub

Cum

CDN

Maj

Cur:

exp

Pro

Fac

Fac

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 CONSULTING SERVICES SUB-SECTOR HIGHLIGHTS

Mission: PRAGUE

Market: CZECHOSLOVAKIA

Sector : OIL & GAS EQUIPMENT, SERVICES

Sub-Sector: SERVICES INCLUDING CONSULTING

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	150.00 \$M	120.00 \$M	90.00 \$M	90.00 \$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

CZECHOSLOVAKIA	54.00 %
UNION OF SOVIET SOC REP	20.00 %
GERMANY WEST	10.00 %
EAST GERMANY	8.00 %
POLAND	5.00 %
DENMARK	3.00 %

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

Products/services for which there are good market prospects:

1. Techn. and Eng. for Used Oil Re-refinery Plant
2. Gas Pipeline Inspection Services
3. Technology and Sour Gas Processing
4. Know-how, Techn. and Serv. for Plastic Pipe Prod.
5. Technologies for Underground Gas Facilities

Factors contributing to current successful Canadian exports:

- Import restrictions are not a impediment in this sector

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Unsuitable product

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PRAGUE

Market: CZECHOSLOVAKIA

- 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: Assist IRGI/PBS/Mohawk Consortium in final negotiations on Oil Re-refining project in Koramo, Kolin

Expected Results: Final negs. to be completed and contract signed in 1989

Activity: Identify prospects for Oil Re-refining projects in third countries (Joint ventures)

Expected Results: Start negs. with Technoexport Prgue and Chepos Brno in 1990

Activity: Assist Pipetronix in Pipeline Inspection Work for Transit Gas, Prague

Expected Results: Canadian companies should submit new offers in 1990

Activity: Technology for Sour Gas processing

Expected Results: Start of negotiations in 1990

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

Activity: Incoming Mission to Intercan, Calgary - 1990

Expected Results: Continuation of discussions with Canadian companies

Activity: Alberta Government Mission to Czechoslovakia in 1990

Expected Results: Introduction of new technologies

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 joint ventures in third countries

Expected Results: Increased cooperation with Czechoslovak organizations

08/01/90

DEPARTMENT OF EXTERNAL AFFAIRS

PAGE: 38

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PRAGUE

Market: CZECHOSLOVAKIA

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

Pipeline Inspection work in Czechoslovakia Approximate Value: 10 M\$
Financing Source : EDC - Export Dev Corporation
DOM - Domestically funded
Contact : Canadian Embassy, Prague

Know-how, technology and serv. for Plastic Pipe Gas Distr. Approximate Value: 10 M\$
Financing Source : EDC - Export Dev Corporation
DOM - Domestically funded
Contact :

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 CONSULTING SERVICES SUB-SECTOR HIGHLIGHTS

Mission: PRAGUE

Market: CZECHOSLOVAKIA

Sector : INDUSTRIAL MACHIN, PLANTS, SERV.

Sub-Sector: SERVICES INCLUDING CONSULTING

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	625.00 \$M	625.00 \$M	625.00 \$M	625.00 \$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: 3-5 \$M

Major Competing Countries	Market Share
GERMANY WEST	40.00 %
UNION OF SOVIET SOC REP	30.00 %
AUSTRIA	10.00 %
UNITED KINGDOM	10.00 %
SWEDEN	10.00 %

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

Products/services for which there are good market prospects:

1. Mfrg lic. for prod. of wide range env. prot. eqpt.
2. Adv. techn. for waste disp/recycl (biotech/fluid bed)
3. Partic. in 3-country mkts with CSSR eqpt mfrs.
4. Adv. techn. for air (de-SOx de-NOx) & wat. pol. contr.
5. Adv. techn. for rehab. of agr. soil (nitrate remov.)

Factors contributing to current successful Canadian exports:

- Import restrictions are not a impediment in this sector

Factors for Canadian exports not reaching market potential:

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

- _____
- _____

08/01/90

DEPARTMENT OF EXTERNAL AFFAIRS

PAGE: 40

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PRAGUE

Market: CZECHOSLOVAKIA

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

Activity: Outgoing Environmental Mission & Technical Seminar
April-May 1990
Expected Results: Introduction of Canadian 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: ENVIBRNO - Oct.1990 - specialized ecological exhibiton -
participation of Canadian companies
Expected Results: Introduction of Canadian capabilities

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 CONSULTING SERVICES SUB-SECTOR HIGHLIGHTS

Mission: SANTIAGO

Market: CHILE

Sector : FOREST PRODUCTS,EQUIP,SERVICES

Sub-Sector: CONSULTING & OTHER SERVICES

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	25.00 \$M	35.00 \$M	60.00 \$M	80.00 \$M
Canadian Exports	2.00 \$M	5.00 \$M	8.00 \$M	12.00 \$M
Canadian Share of Market	8.00 %	14.00 %	13.00 %	15.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	40.00 %
SWEDEN	15.00 %
CANADA	15.00 %
GERMANY WEST	10.00 %
CHILE	10.00 %
EUROPEAN COMMON MARKET C	10.00 %

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

Products/services for which there are good market prospects:

1. Logging equipment
2. Skidders
3. Sawmill equipment
4. Off road vehicles
5. Portable sawmills
6. Fire fighting equipment
7. Spare parts

Factors contributing to current successful Canadian exports:

- Import restrictions are not a impediment in this sector

08/01/90

DEPARTMENT OF EXTERNAL AFFAIRS

PAGE: 42

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: SANTIAGO

Market: CHILE

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Market prospects have not been adequately explored
- Lack of understanding of growth of
- the ind. in Chile & of value of Cda

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

Activity: Exporcorma '89

Expected Results: Introduce Cdn cos to market and increase current exports

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

Activity: Forestry Mission to Canada

Expected Results: Insure that Chilean decision makers are well aware of Cdn

Activity: Expocorma '91

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 CONSULTING SERVICES SUB-SECTOR HIGHLIGHTS

Mission: SANTIAGO

Market: CHILE

Sector : MINE,METAL,MINERAL PROD & SRV

Sub-Sector: CONSULTING & OTHER SERVICES

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	20.00 \$M	25.00 \$M	25.00 \$M	25.00 \$M
Canadian Exports	7.00 \$M	10.00 \$M	25.00 \$M	15.00 \$M
Canadian Share of Market	35.00 %	40.00 %	40.00 %	60.00 %

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

Major Competing Countries

Market Share

CANADA	40.00 %
UNITED STATES OF AMERICA	30.00 %
SOUTH AFRICA	20.00 %
CHILE	10.00 %

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

Products/services for which there are good market prospects:

1. Exploration services
2. Drilling services
3. Mine development planning

Factors contributing to current successful Canadian exports:

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

08/01/90

DEPARTMENT OF EXTERNAL AFFAIRS

PAGE: 44

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: SANTIAGO

Market: CHILE

Factors for Canadian exports not reaching market potential:

- _____
- _____

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 CONSULTING SERVICES SUB-SECTOR HIGHLIGHTS

Mission: SANTIAGO

Market: CHILE

Sector : MINE,METAL,MINERAL PROD & SRV

Sub-Sector: CONSULTING & OTHER SERVICES

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	20.00 \$M	25.00 \$M	25.00 \$M	25.00 \$M
Canadian Exports	7.00 \$M	10.00 \$M	25.00 \$M	15.00 \$M
Canadian Share of Market	35.00 %	40.00 %	40.00 %	60.00 %

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

Major Competing Countries	Market Share
CANADA	40.00 %
UNITED STATES OF AMERICA	30.00 %
SOUTH AFRICA	20.00 %
CHILE	10.00 %

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

Products/services for which there are good market prospects:

1. Exploration services
2. Drilling services
3. Mine development planning

Factors contributing to current successful Canadian exports:

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

08/01/90

DEPARTMENT OF EXTERNAL AFFAIRS

PAGE: 46

RPTC3

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: SANTIAGO

Market: CHILE

Factors for Canadian exports not reaching market potential:

- _____
- _____

