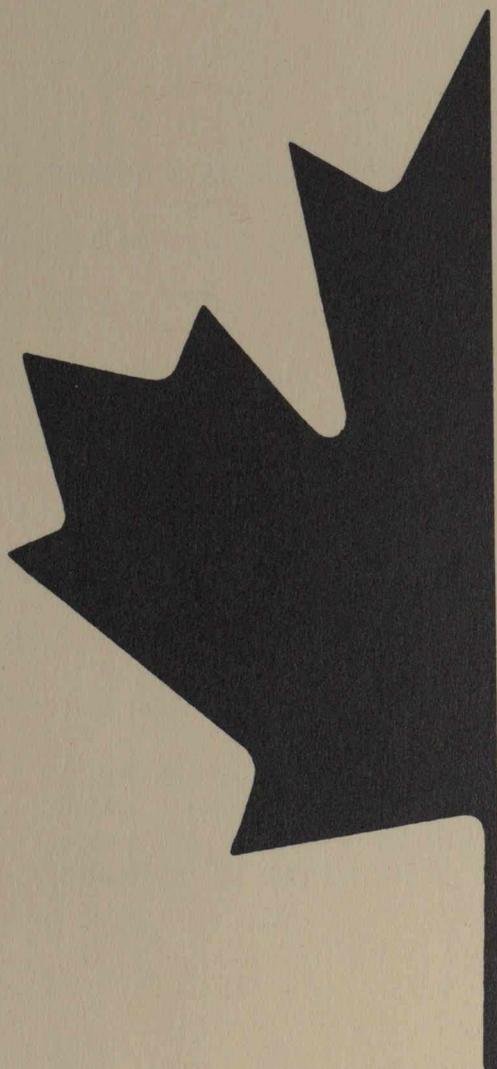


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BRUNEI

INDONESIA

MALAYSIA

PHILIPPINES

SINGAPORE

THAILAND

**EXPORTERS GUIDE
TO ASEAN**

1988

The information contained in this publication is current as of
February 1, 1988.

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CANADA-ASEAN RELATIONS

BACKGROUND

Canada has consistently supported the ASEAN countries in their demand that Vietnam withdraw its forces from Cambodia and Laos and that the ASEAN countries stand outside the vital and tense area of the Pacific and South Asia with the other members of the Western Pacific and North America with an expanding system of trade and economic relations. The ASEAN countries are in a position to play a leading role in the region and to contribute to the economic development of the Pacific region. Canada's economic interests in the region are substantial and growing.

The Canada-ASEAN Economic Council was established in 1981. The Council was the first of its kind in the world and its establishment was a significant step in the development of trade and economic relations between Canada and the ASEAN countries. The Council has held several meetings since its establishment and has been successful in promoting trade and economic cooperation between the two groups of countries.

CANADA-ASEAN RELATIONS

CANADIAN INTERESTS IN ASEAN

Security

Canada has consistently supported the ASEAN countries in their demand that Vietnam withdraw its forces from Cambodia and Laos and that the ASEAN countries stand outside the vital and tense area of the Pacific and South Asia with the other members of the Western Pacific and North America with an expanding system of trade and economic relations. The ASEAN countries are in a position to play a leading role in the region and to contribute to the economic development of the Pacific region. Canada's economic interests in the region are substantial and growing.

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CANADA-ASEAN RELATIONS

BACKGROUND

Canada has sought, since the mid-seventies, to develop substantive relations with ASEAN in recognition of its positive contribution to the peace, stability and development of Southeast Asia and to strengthen bilateral links with ASEAN member states. Canada became a "dialogue partner" with ASEAN in 1977. In order to ensure a formalized contact point for each of its "dialogue partners" (Canada, Australia, the EEC, Japan, New Zealand and the United States), ASEAN designates a coordinating country on a rotating basis. Canada's current dialogue coordinator is Thailand.

A Canada-ASEAN Economic Cooperation Agreement was signed in September 1981, and came into effect in June 1982. Under the Agreement, a Joint Cooperation Committee (JCC) was established to review progress in various forms of commercial and development cooperation between Canada and the ASEAN multilateral grouping. The first JCC meetings have been held annually, alternating between Ottawa and ASEAN capitals. The fifth meeting of the JCC was held in Ottawa, April 7-8, 1988.

Since 1980, the SSEA has attended the annual ASEAN Foreign Ministers Post Ministerial Conference (PNC) in various ASEAN capitals. The conference focuses on regional and international economic and political issues of interest to ASEAN and the dialogue partner countries. It provides a unique opportunity for the SSEA to discuss evolving bilateral relationships with Foreign Ministers of ASEAN states.

CANADIAN INTERESTS IN ASEAN

Security

Canada has consistently supported the ASEAN countries in their demand that Vietnam withdraw from Cambodia, thereby reducing regional tensions. From a strategic perspective ASEAN stands astride the vital sea lanes which link the Middle East and South Asia with the free market economies of the Western Pacific and North America. With an expanding volume of trans-Pacific trade, any disruption in the movement of goods in the region would be of direct significance to the ASEAN and Pacific countries such as Japan and Australia, which are among Canada's most important trading partners.

Political

The ASEAN nations, with their free market economies and open societies, are an attractive model to promote under the Asia-Pacific region and thus have been accorded strong

Canadian support. Various ASEAN countries are important members of OPEC, the Islamic conference, the Non-Aligned Movement, the Group of 77, the Cairns Group and the North-South Dialogue. Canada's political attitude towards ASEAN also derives from such factors as the Commonwealth relationship with three of its members (Singapore, Brunei and Malaysia), major development assistance programs in Indonesia, Thailand, Malaysia and the Philippines, and the large number of immigrants from Southeast Asia in Canada. Canada's acceptance of some 105,000 Indochinese refugees since 1975 has earned Canada considerable credit with ASEAN governments.

Trade and Economic Relations

Canada is a substantial importer of natural resource commodities from ASEAN. Total two-way trade between Canada and ASEAN in 1987 was CDN \$1.8 billion. While ASEAN only imports about 1% of total Canadian exports, there is considerable scope for an expansion of trade in both directions. Canadian exports to ASEAN rank ahead of exports to France or Italy. In 1986, Canada's trade with ASEAN, as a whole, was in deficit for the first time. CIDA/Industrial Cooperation Division (INC) has provided a grant of \$100,000. to the Canadian Chambers of Commerce toward the costs of studies and programs which should contribute to expanding the interest of Canadian companies in trade and investment in ASEAN. Additionally, Canada will finance market development visits and market information seminars in Canada for ASEAN business representatives. In December 1986 the ASEAN-Canada Business Council was created jointly by the Canadian Chamber of Commerce and the ASEAN Chambers of Commerce and Industry to foster closer mutual understanding and promote closer business relationships between Canada and the six countries of ASEAN.

Development Cooperation

Until 1986, development cooperation had centered primarily on natural resource development and transfer of technology. Given the rapid growth in the economies of ASEAN, assistance has been evolving towards a greater emphasis on industrial cooperation and, more particularly, human resources development, an area where Canada is making a major initiative. Following announcements by the SSEA at the PMC in Singapore last June, an ASEAN Human Resources Development Fund was established with funding of \$750,000 for study tours and training, primarily for government personnel. An ASEAN scholarship fund has also been established with funding of \$60,000 to permit approximately 30 person years of diploma and graduate training in Canadian educational institutions. Canada will also establish a Canada-ASEAN Centre to support and facilitate ASEAN-wide development cooperation activities.

Historical Background

The Association of Southeast Asian Nations (ASEAN) comprising Indonesia, Malaysia, the Philippines, Singapore and Thailand, was formed in Bangkok in 1967. ASEAN began its work in January 1968. The original objectives of ASEAN as stated in the Bangkok Declaration were: (1) to accelerate economic growth, social progress and cultural development in the region, and (2) to promote regional peace and stability. A major ASEAN accomplishment, over the years, has been to moderate the antagonistic attitudes between the countries of the region. They have succeeded in preventing the escalation of conflicts which had been a major cause of regional disputes such as Indonesia's "Confrontation" with Malaysia and the Philippines' claim to the Malaysian state of Sabah.

In 1971, the Foreign Ministers of the five founding members of ASEAN signed the Kuala Lumpur Declaration calling for a Zone of Peace, Freedom and Neutrality (ZOPFAN), with the aim of keeping the region free from any power rivalries. The idea has developed as an important objective of ASEAN in the view of the committee members in Vietnam, Laos and Cambodia in 1978. In February 1978, at - 2 - the summit meeting of the ASEAN Heads of Government and Government in Bali where they signed a Treaty of Amity and Cooperation which established mechanisms for settling disputes.

**ASSOCIATION OF SOUTHEAST
ASIAN NATIONS: A PROFILE**

The second ASEAN Summit in Kuala Lumpur in 1977, reaffirmed the directions established in 1967. The Kuala Lumpur Summit also affirmed the importance of "dialogue" with other countries, particularly Australia, New Zealand, Canada, Japan and the U.S.

The third ASEAN Summit was held in Manila in December, 1981. The Manila Declaration gave new impetus to regional economic cooperation and approved amendments to the Treaty of Amity and Cooperation to facilitate greater contacts and cooperation between ASEAN and other countries, particularly within the Asia-Pacific region.

Political Cooperation

It is in the area of political cooperation that ASEAN has had its most remarkable success. Regular meetings of Foreign Ministers, Economic Ministers and other senior political and government officials have been institutionalized. ASEAN cooperation now extends to various international forums such as the UN and the Non-Aligned Movement, as well as to the activities of ASEAN missions in foreign capitals.

ASSOCIATION OF SOUTHEAST ASIAN NATIONS: A PROFILE

Historical Background:

The Association of Southeast Asian Nations (ASEAN), comprising Indonesia, Malaysia, the Philippines, Singapore and Thailand, was formed in Bangkok in 1967. Brunei became the sixth member in January 1984. The original objectives of ASEAN as stated in the Bangkok Declaration were: (1) to accelerate economic growth, social progress and cultural development in the region, and (2) to promote regional peace and stability. A major ASEAN accomplishment, over the years, has been to moderate the antagonisms between the countries of the region. They have set aside the legacy of bitterness and hostility which had been manifest in regional disputes such as Indonesia's "Confrontation" with Malaysia, and the Philippines claim to the Malaysian state of Sabah.

In 1971, the Foreign Ministers of the five founding members of ASEAN signed the Kuala Lumpur Declaration calling for a Zone of Peace, Freedom and Neutrality (ZOPFAN), with the aim of keeping the region free from big power rivalries. The idea has re-emerged as an important objective of ASEAN in the wake of the communist successes in Vietnam, Laos and Cambodia in 1975. In February 1976, the first Summit meeting of the ASEAN Heads of Government was convened in Bali where they signed a Treaty of Amity and Cooperation which established mechanisms to resolve outstanding bilateral disputes. The importance of political consultations and economic cooperation was emphasized by the signing of the Declaration of ASEAN Concord, which established a framework for sustained consultations at various political and economic levels.

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Political Cooperation:

It is in the area of political cooperation that ASEAN has had its most remarkable success. Regular meetings of Foreign Ministers, Economic Ministers and other senior political and government officials have been institutionalized. ASEAN coordination now extends to activities in various international fora, such as the UN and the Non-Aligned Movement, as well as to the activities of ASEAN missions in foreign capitals.

Concerted action in the United Nations on such issues as Cambodia has led to consultations and even united action on a wide variety of issues of both direct and indirect interest to the members of the Association. For example, the ASEAN countries have worked at coordinating their response to Law of the Sea issues, they have taken common stands on a variety of commodity issues, and have worked together effectively within the GATT and on deliberations for the Uruguay MTN Round. They have also presented a coordinated view to the Economic Summits since 1984.

Economic Cooperation:

While ASEAN members have made great strides in political cooperation on bilateral, regional, and international political/security issues and broad economic matters, trade and commercial cooperation has been relatively modest. Progress in this latter respect has been slow since ASEAN economies are not complementary and, in many respects, members are competitors in the natural resources, agriculture, and fisheries sectors.

The Third ASEAN Summit took several steps to galvanize greater economic cooperation among members, with particular attention to the three high-profile schemes now in place: ASEAN Preferential Tariff Arrangements; ASEAN Industrial Joint Ventures; and ASEAN Industrial Complementmentation.

The basic feature of preferential tariff arrangements has been a commitment to exchange tariff preferences based on lists of products imported by member countries. Since its introduction in 1977, the PTA has grown to include over 20,000 items. However, the PTA scheme has not been successful in promoting intra-ASEAN trade as most significant items have been excluded. The Manila Declaration announced a 5-year plan to extend PTA coverage to 90% of total goods traded within the region and at least 50% of the value of total ASEAN-sourced imports. Other measures included an increase in preferential tariff rates and a commitment to "standstill and rollback" on tariff and NTBs affecting intra-ASEAN trade.

The ASEAN Industrial Joint Ventures scheme was amended to attract greater private sector interest, especially from foreign investors who may now possess 60% equity in AIJV projects, up from 49%. Other improvements included an increase in tariff preferences for AIJV products and undertaking to introduce Investment Guarantee legislation to protect investments from appropriation or nationalization.

ASEAN industrial complementmentation has been designated by the governments as the private sector's contribution to economic cooperation. Various industry groups, working through the ASEAN Chamber of Commerce and Industry, have set up

"industry clubs" (15 at present) to develop cooperative approaches designed to strengthen their joint commercial and industrial activities. In some cases this has led to the integration of the industry on an ASEAN-wide basis. Cooperation takes the form of harmonization of product standards and testing procedures, research and development, and coordination of investment projects so that ASEAN companies will not compete with each other. Again, progress has been very slow in the area of industrial complementation.

Administrative Structure:

The 1976 Bali Summit created an ASEAN Permanent Secretariat in Jakarta, but it was given limited authority. The Secretary-General of ASEAN is responsible for administering the Secretariat but not the Association. Each country has its own national office of "Director-General, ASEAN" to handle ASEAN matters and collectively they form the ASEAN Standing Committee.

Five economic committees have been set up under ASEAN's economic ministers: Trade and Tourism (COTT); Industry, minerals and energy (COIME); Food, Agriculture and Forestry (COFAF), Finance and Banking (COFAB), and Communications and Transportation (COCT). There are also various sub-committees, working groups, ad hoc bodies and experts' groups. Decisions are taken by unanimous consent and the pace can be slow. Although this has disadvantages, it could hardly be otherwise in an association dependent on the full consensus of its membership.

Many local non-governmental bodies have federated to become ASEAN-wide organizations. Accordingly, there is an ASEAN Chamber of Commerce and Industry, an ASEAN Inter-Parliamentary Organization, an ASEAN Council on Petroleum (ASCOPE), a Confederation of ASEAN Journalists and an ASEAN Bankers' Association.

BRUNEI

GENERAL INFORMATION

Brunei is located on the island of Borneo and comprises an area of 5,765 square kilometres. The population of 220,000 is composed of Malays (40%), Chinese (30%) and indigenous tribes (29%). Languages spoken include Malay, English and Chinese dialects. A British protectorate from 1888, Brunei refrained to join the Malay federation in 1963 and became an independent Sultanate in 1964 at the expiration of a 140 year old treaty relationship with Britain.

POLITICAL AND ECONOMIC SITUATION

The Sultanate of Brunei is ruled by His Majesty Sultan Sir Muda Hassanal Bolkiah. The Sultan and his three brothers control all effective power. They are helped by a group of able and western educated technocrats. Traditional loyalty to the Royal Family and the Islamic faith provides cohesiveness within Brunei society. Although political parties are legal, only one has been formed and elections have not been held since 1962.

Brunei citizens enjoy one of the highest per capita GNP's in the world, estimated at about US \$23,000. Ninety-eight percent of Brunei's GNP derives from oil and gas exports. The government runs a \$2 billion surplus and reserves are in excess of US \$13 billion. Efforts are being made to diversify economic activity away from over-dependence on oil and gas. Other areas of interest such as agriculture, forestry and financial activities have been identified in Brunei's First Development Plan (1985-1990).

FOREIGN POLICY ORIENTATIONS

Brunei has joined ASEAN, the Commonwealth, Organization of the Islamic Conference and the United Nations, as well as the Islamic Development Bank's long-term trade financing program. Brunei is not a member of OPEC but it holds observer status. ASEAN is the number one priority in its fledging foreign policy. Japan, Singapore, Britain, the USA and South Korea are its main trading partners.

CANADA-BRUNEI RELATIONS

Canada's bilateral relations with Brunei are mainly pursued through ASEAN and the Commonwealth, a situation which is likely to continue. Canadian banks have shown an interest in the country and there may be opportunities to capitalize on diversification of Brunei's management of its financial assets. It is worth noting that Prime Minister Trudeau paid the first official visit to Brunei by a foreign head of government in January 1983. The Sultan came to Canada in September 1987 to attend the Commonwealth Head of Government Meeting in Vancouver. 1988 marks a special date in Canada-Brunei relationship as Brunei will become, in July, Canada's dialogue co-ordinator with ASEAN. There are approximately one hundred Bruneian students in Canada.

TRADE OVERVIEW

The Sultanate of Brunei Darussalam with a population of only 220,000 inhabitants offers a limited domestic market. Nonetheless, real commercial opportunities do exist. The country is very wealthy, earning large sums of money from overseas investment income from Brunei's reserves estimated to be worth from U.S.\$15-20 billion.

In the Brunei Government fifth Five Year National Development Plan (1986-90), overall spending is set at CDN \$10.2 billion. Total development expenditure is set at \$3.45 billion, of which the oil sector will account for \$1.35 billion and the public sector for \$1.64 billion. Of the public sector spending, 29% is destined for social services, 20% for public utilities; 20% for transportation and communications, 10% for industry and commerce, and 10% for defence.

Plans for human resource development are part of the government's diversification strategy aimed at making the country less dependent on oil and gas (which accounts for 99% of the country's exports and 75% of the gross domestic product - GDP). As well, development of the country's infrastructure and improved social services are emphasized. Priority is also attached to the establishment of import substitutional and export oriented industries. The government oil conservation policy, in combination with volatile oil prices, has had a sharp impact on GDP which achieved a real growth of 4.0% in 1986. The government has also attached high priority to developing a qualified cadre of senior officers and the majority of key decision makers have been educated abroad (many in Canada).

As Brunei authorities attempt to diversify the economy, there will be opportunities for Canadian consultants in the public sector, in education as well as in joint ventures in small-scale manufacturing. A number of new projects outlined in the Five Year Plan offer opportunities for Canadian involvement, especially in the fisheries, forestry, telecommunications/informatics, oil and gas, agriculture, education and defence sectors.

Our Post has estimated Canadian exports to Brunei to be worth about \$2 million annually. As well, some Bruneian investments appear to have been placed in Canada, particularly in securities in Canadian government bonds.

Recently, Canadian companies have been experiencing notable successes in Brunei. Alberta Telecommunications International won in July 1987 a contract worth CDN \$1.5 million for the design of a feeder and

distribution underground cable subscriber carrier system and is presently bidding on a project management contract for an external cable system in the Seria exchange area. In September 1987, Brunei decided to purchase for CDN \$800,000. a meteorological satellite reception and analysis system from MacDonald Dettwiler. This MDA system is to be operational by September 1988.

Although two officials from Brunei did participate in the ASEAN MTN study visit to Canada in October, Brunei is not a member of the GATT, and will not play a direct role in the current MTN round.

CANADIAN MARKETING OBJECTIVES

1. Fisheries: Technical assistance to organize and implement an aquaculture program in Brunei. Study of the present use of fish resources with a view to examining the potential for processing and export.

2. Forestry: Feasibility study on the development of tree plantations. Interest has also been expressed in more detailed information on nursery techniques, saw-milling, and kiln drying operations (not using steam boilers).

3. Communications and Informatics: Opportunities appear to exist for the supply of a cellular telephone system, telecommunications management consulting services, provision of an automated library system, mechanized passport control system, and broadcasting equipment and training services.

TRADE CONTACTS

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INDONESIA

INTRODUCTION

Indonesia is an archipelagic nation consisting of 13,000 islands stretching between the Indian and Pacific Oceans. It has a population of 170 million people of whom some 90 million are located on the island of Java. Indonesians consist of over 300 different ethnic groups speaking 250 distinct languages and dialects. The religion of the majority is Islam although pre-Islamic local beliefs and customs remain strong. Other important religions are Christianity and Hinduism. Indonesia continues to rank as one of the more successful developing countries. Under the leadership of the Soeharto Government it has enjoyed over two decades of political stability and steady economic growth, accompanied by a rising standard of living.

POLITICAL AND ECONOMIC SITUATION

Indonesia has a complex republican form of government including an Advisory Council and Consultative Assembly and is heavily influenced by the traditional Javanese, and indeed Indonesian sense of respect for leadership and authority. The President has just been re-elected by acclamation for a fifth five year term of office. The new Cabinet appointments he subsequently made indicate that existing government policy directions will be maintained in economic liberalization measures and international relations.

The Indonesian economy is divided between a large, fragmented agricultural sector and a small, dynamic industrial sector. Indonesian industry has been fuelled by inexpensive domestic oil and is primarily oriented to satisfy a substantial domestic market. Import substitution has been the traditional emphasis of Indonesian industrialization while export earnings have come from the petroleum, forestry and minerals sectors. With the dramatic fall in prices of crude oil in the international market place and the concomitant fall in export revenues Indonesia has sought to diversify its exports and to strengthen the performance of non-oil production sectors. Various policies have been applied to achieve the desired results including a thorough reform of customs procedures, and a general liberalization of business and trading practices, which is still in process. These policies have proven to be effective: the share of non-oil export earnings grew to 60% of overall export earnings in 1987 lessening Indonesia's traditional reliance on oil exports.

Despite responsive economic policies foreign debt has risen sharply in recent years as the government borrowing for development projects in compensation for lower oil and gas export receipts. At the end of 1987 foreign debt is estimated to exceed \$45 billion with a debt service ratio in excess of 40%. Nonetheless Indonesia has managed to maintain a healthy foreign reserve position sufficient for approximately 9 months of imports. Indonesia's progressive and steady financial and fiscal policies have resulted in the country becoming one of

the most credit worthy of developing nations. Access to international loans has allowed the Government to adjust to international market fluctuations better than many other countries and to avoid the social and political stresses which have resulted from economic disruption and falling standards of living.

FOREIGN POLICY

Indonesia's foreign policy is characterized by a non-aligned stance with a pro-western tilt and constructive cooperation with neighbouring countries, especially ASEAN members. Indonesia was a founder of the Non-Aligned Movement (NAM). Since the mid-sixties it has leaned increasingly to the West both in political orientation and in economic and trade policies. It is a moderate and moderating participant in the Non-Aligned Movement (NAM), the Group of 77, the North-South Dialogue, the Islamic Conference and in various commodity groups including OPEC.

The Association of Southeast Asia Nations (ASEAN) is a paramount foreign policy consideration for Indonesia (the Secretariat is in Jakarta) and the degree of consultations among its members is increasingly reflected in Indonesia's position on various issues of common concern.

CANADA-INDONESIA RELATIONS

Canada has a continuing political interest in supporting governments which share a commitment to regional peace and stability in Southeast Asia. Indonesia's size, leadership role within ASEAN, importance as a moderating member of the Non-Aligned Movement, the Group of 77, OPEC and the Islamic Conference make it a country of increasing political importance to Canada. Furthermore, Indonesia and Canada share congruent interests across a number of international issues such as Cambodia, the Law of the Sea, North-South negotiations, commodities and regional security. In July 1985, the SSEA, accompanied by Maureen McTeer, paid a four-day visit to Indonesia. The first Parliamentary visit to Indonesia took place in February 1986. Foreign Minister Mochtar visited Ottawa February 16-18, 1987 as the guest of the Secretary of State for External Affairs, the Right Honourable Joe Clark. A second Parliamentary delegation visited Indonesia in November 1987.

Indonesia recognizes access to Canadian technology, finance and markets as a partial counterweight to the United States and Japan. Western (including Canadian) acceptance and support of President Soeharto's New Order and the resulting aid flow has provided a key political and economic boost to Indonesia. The development cooperation program with Indonesia constitutes Canada's third largest bilateral program in the world, with an indicative planning figure approaching \$300 million over the next five years. Emphasis is on human resources development and natural resources management.

TRADE OVERVIEW

Indonesia's population of 170 million offers an enormous relatively untapped market for Canadian products. Canadian engineering firms have been active in the country for many years implementing projects for the World Bank, the Asian Development Bank and the Canadian International Development Agency which devotes more than \$50 million annually to Indonesia as a country of concentration. These engineering firms have earned an outstanding reputation for Canada and have successfully created a number of important projects including the Bukit Asam coal project, the Suralaya power station, the Lombok irrigation project, etc.

Indonesia's imports in fiscal 1986/87 were worth some US\$11 billion, of which perhaps \$1 billion were funded under assistance programs. Canada's share is miniscule, at CDN \$305 million in calendar 1987, generally through lack of appreciation of the opportunities untapped and awaiting suppliers.

There are important commercial opportunities which remain untapped by Canada, including a gas gathering system for new dual-fired power stations as well as potential turbine co-generation projects. There will also be continuing requirements in software, space, telecommunications, electrical switch gear, coal mining, ports, industrial chemicals, food products, packaging equipment, etc. Some of these opportunities will require the support of the Export Development Corporation if they are to be successfully pursued. EDC is responsive and understanding of Indonesia's financial condition and whenever possible will provide imaginative and supportive terms to assist Canadian exporters. The project market is sometimes considered to be "spoiled" through competition from Europe, Japan, USA and Australia but there is room for Canada if exporters will visit more frequently, and develop an understanding of the market, work closely with the Commercial Division at the Embassy, with EDC and with CIDA. In 1988 there will be a particular campaign to bring the merits of the Indonesian market to the attention of Canada's exporters and improve Canada's access to an increasingly vital non-governmental market.

CANADIAN MARKETING OBJECTIVES

1. Oil and Gas Equipment and Services - The Government of Indonesia has announced its intention to exploit gas deposits as fuel for power. Therefore, opportunities to supply consulting and equipment.
2. Agriculture and Food Products and Services - Opportunities exist to expand Canadian food exports by better acquainting Indonesian importers and wholesalers with Canadian suppliers.
3. Mining, Metals and Minerals, Products and Services - Indonesian mining developments in gold, coal and nickel are expanding rapidly, resulting in significant opportunities for consulting services, mining and transportation equipment.

4. Power and Energy Equipment and Services - Canada has enjoyed strong performance in engineering services and the power boiler sector. The challenge is to maintain this market share and expand penetration to include possible new opportunities in turbo-electric and nuclear markets.
5. Industrial Machinery, Plant and Services - Canada has demonstrated ability to supply niche markets for industrial and production equipment. Increased importance will be placed on expanding the range of agencies covering this sector.
6. Communications and Informatics, Equipment and Services - Canadian firms are actively promoting PBX, telex, satellite software, telecom training and management, and telecoms ancillary equipment. These firms are well accepted, and sales will be secured in fiscal 1988-89.

TRADE CONTACTS

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March 1988

FACT SHEET - INDONESIA

Area: 1.9 million km² **Population:** 168 million (1987)

Capital: Jakarta **System of Government:** Unitary Republic

Head of State: (President) Soeharto **Minister of Trade:** Rachmat Saleh

Language: Bahasa Indonesia **Ethnic Background:** Indo-Malay 90%;
Melanesian 5%; Others 5%

Religion: Moslem 80%, Christian, Hindu & Others 20% **Per Capita Income:** US \$531 (approx).
Cdn \$1 = approx 1300 Rp

GDP: (1987) US \$82 B (est.) **Currency:** New Rupiah

Inflation Rate: 8% (1987) **Debt Service Ratio:** 36%

Unemployment Rate: 18% (unofficial 1987)

Major Trading Partners (1987):

Exports Total: US \$17.6 billion (est)	Imports Total: US \$12.6 billion (est)
1. Japan	1. Japan
2. USA	2. USA
3. Singapore	3. Singapore
4. Netherlands	4. West Germany
5. South Korea	5. Saudi Arabia

	Canadian Trade Statistics: (Cdn \$ millions)		Jan-Sept (cumulative)	
	1985	1986	1987	
Exports	257.6	240.9	272.8	
Imports	81.8	114.2	147.7	
Total	339.4 (+ 175.8)	355.1 (+ 126.7)	420.5 (+ 125.1)	

Major Canadian Exports

Weat
Potash
Railway Equipment
Wood Pulp
Sulphur

Major Canadian Imports

Natural Rubber
Clothing
Plywood
Coffee
Textile Fabric

Main Sectors of Opportunity for Canadian Business:

1. oil and gas (exploration, drilling, processing equipment and services)
2. communications (satcom, rural, remote sensing)
3. power (thermal, hydro, nuclear)
4. transportation

EDC Status: On cover **CIDA Status:** CORE country (Category I)

Resident Canadian Banks: Hong Kong Bank of Canada

Canadian Reps in Indonesia: Ambassador - Jack Whittleton

Commercial Counsellor - Doug Campbell

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Fax: 6221 578-2251

Department of External Affairs/PST Trade Contact: John Clapp (613) 996-5824

Indonesian Reps in Canada: (Ottawa) Ambassador - Adiwoso Abubakur; Economic Counsellor - Bes Soetarto; Commercial reps: Ottawa, Toronto and Vancouver

Canadian-Indonesian Business Council: Chairman - Richard Mann, Toronto
(416) 766-8478

MAJOR CANADIAN EXPORTS TO INDONESIA
('000s)

	1985	1986	1987
Wood pulp	12,500	30,408	64,857
Sulphur, crude or refined nes	46,807	28,652	38,228
Potassium chloride, muriate	23,009	23,489	30,967
Plastic & synthetic rubber not shaped nes	14,442	17,883	25,136
Power boilers, equipment & parts	1,211	62	22,283
Wrap paper, unbl. sulphite/sulphate	5,442	3,877	12,578
Red spring wheat nes, except seed	62,830	36,409	11,143
Alberta winter wheat exc. seed	-	-	9,057
Rapeseed oil cake and meal	6,126	7,608	6,631
Railway rails, new	-	6,499	6,521
Commercial telecommu. eqpt nes	687	1,305	5,506
Polyethylene resins	5,221	4,883	5,314
Unclassifiable exports	5,368	5,426	4,697
Alcohols and their derivatives	1,824	4,900	4,517
Rapeseed oil	103	74	4,485
Zinc blocks, pigs & slabs	6,212	4,723	4,467
Asbestos	1,785	2,876	3,886
Gas turbines & parts	327	1,038	3,442
Petrol, coal, gas, prod mach. pt nes	263	681	2,420
Wheat, except seed nes	-	-	2,330
Engines & turbines & pts nes	432	208	2,085
Chemical pharm prod machy & pts	1,416	734	2,028
Laboratory instr eqpt & pts nes	34	38	1,963
Aircraft engines and parts	5,385	8,311	1,797
Man-made fibres nes	2,135	2,118	1,752
Rapeseed screenings	-	-	1,635
Radio transmitting-receiving units	1	-	1,623
Contractors equipment & tools	7	1,134	1,331
Aluminum bar rod plate sheet circle	6,495	4,730	1,224
Insulated wire and cable	323	1,380	1,097
Aircraft assemblies eqpt & pts nes	968	834	988
Parts & accessories for chain saws	577	1,740	971
Poultry farm apiary equipment & pts nes	631	1,327	742
Earth drilling & rel mach & pts nes	12,510	350	293
Liner board	1,565	271	22
Locomotives and tenders, engines & pts	-	20,675	8
Motor vehicles nes	-	2,130	1
Newsprint paper	13,602	4,079	-
Sub-Total	240,238	230,852	285,416
Total	257,607	240,898	305,079

(Source: Statistics Canada)

MAJOR CANADIAN EXPORTS FROM INDONESIA
('000s)

COMPOSITION BY CLASSIFICATION

	1985		1986		1987	
	\$'000s	%	\$'000s	%	\$'000s	%
I Live animals	137	-	201	-	519	-
II Food products	70,602	28	44,347	18	31,924	10
III Crude material, inedible	50,806	20	33,709	14	44,074	15
IV Fabricated material, inedible	96,243	37	109,749	46	165,076	54
V End products	34,443	13	46,331	19	57,455	19
VI Special transactions	5,376	2	6,561	3	6,031	2
	257,607	100	240,898	100	305,079	100
	158,843					
	188,019					

MALAYSIA

(Source: Statistics Canada)

(Source: Statistics Canada)

MAJOR CANADIAN IMPORTS FROM INDONESIA
('000s)

	<u>1985</u>	<u>1986</u>	<u>1987</u>
Crude natural rubber, except latex	24,855	36,657	47,959
Plywood	14,148	22,244	39,136
Clothing	21,523	18,736	23,510
Copper in ores & concentrates	-	-	14,447
Textile fabrics	5,018	8,844	11,499
Coffee, green	5,304	11,695	7,439
Gold in ores & concentrates	-	-	4,368
Tea, black nes	3,745	2,738	3,562
Tin blocks, pigs & bars	635	1,355	1,936
Pepper, ground or unground	1,097	1,326	1,848
Precious metals in ores & conc nes	-	-	1,038
Goods returned within 5 years	34	2,498	975
Millwork, nes	679	1,157	926
Sub-Total of	<u>77,038</u>	<u>107,250</u>	<u>158,643</u>
Total	<u>81,837</u>	<u>114,189</u>	<u>168,010</u>

(Source: Statistics Canada)

MALAYSIA

GENERAL INFORMATION

The Federation of Malaysia consists of Peninsular Malaysia and the States of Sabah and Sarawak. The population of 18 million is composed of Malays (57%), Chinese (23%), Indians and Pakistanis (10.5%), Indonesians (5.9%), and others (0.7%). Malaysia is a parliamentary democracy with a Paramount Ruler (Yang di-Pertuan Agong) elected for a five-year term by and from a group of nine hereditary rulers of the nine states.

POLITICAL AND ECONOMIC SITUATION

Since the Federation of Malaysia was established in 1963, the country has been ruled by a single coalition of ethnic parties, now called the United Malays National Organisation (UMNO). The National Front was formed in 1973, restructuring the majority of members of the UMNO, previously the greatest group. Tun Razak, the first Prime Minister and President of UMNO since 1971 and the first Prime Minister and his National Front Government were jointly re-elected in August 1986. He was narrowly re-elected as Prime Minister in April 1997. Following the challenge in court to Dr. Mahathir's leadership by a group of UMNO dissidents, it was ruled in February 1998 that UMNO was a political organization, not a party, under Dr. Mahathir's leadership is now under organization.

MALAYSIA

Malaysia is highly dependent on exports of primary products such as rubber, tin, oil, and palm oil. The GNP growth was 11.5% in 1997 and is expected to reach 10% in 1998. The 5th Malaysia Plan (1996-1999), announced in March 1996, will focus on the private sector to be the engine of growth.

FOREIGN POLICY INTERESTS

Dr. Mahathir has set Malaysia's foreign policy priorities in the following order of importance: (1) the Islamic Conference Organization, (2) ASEAN, (3) the Commonwealth. Malaysia has been active in promoting the concept of "Asian Free Trade Area" (AFTA) in the region. With Indonesia, it initiated which attempted to form a regional grouping. Malaysia has been active in promoting peaceful country relations and has been a member of several high priority regional organizations including ASEAN, OIC, and economic links with neighboring countries.

MALAYSIA

GENERAL INFORMATION

The Federation of Malaysia consists of Peninsular Malaysia and the States of Sabah and Sarawak. The population of 15 million is composed of Malays (45%), Chinese (35%), Indians and Pakistanis (10.5%), indigenous tribes (9%) and others (0.7%). Malaysia is a parliamentary democracy with a Paramount Ruler (King or "Agong") elected for a five-year term by and from a group of nine hereditary Malay rulers from each state.

POLITICAL AND ECONOMIC SITUATION

Since the Federation of Malaya was established in 1948, the country has been ruled by a strong coalition of ethnic parties, now called the National Front, the largest member of which was the United Malay National Organization (UMNO). The National Front has succeeded in peacefully restructuring the society in favour of the ethnic Malays, previously the poorest group. Datuk Seri Dr. Mahathir Mohamad has been President of UMNO since 1981 and although himself and his National Front Government were easily re-elected in August 1986, he was narrowly re-conducted as Party President in April 1987. Following the challenge in court to Dr. Mahathir's leadership by a group of UMNO dissidents, it was ruled in February 1988 that UMNO was an illegal political organization due to certain registration irregularities. A "New UMNO" party, under Dr. Mahathir's chairmanship is now under organization.

Malaysia is highly dependent upon exports of primary products such as rubber, timber, tin and palm oil. In 1986, GNP growth was 1% compared to 5.2% in 1985; it reached 2.5% in 1987 and is expected to reach 4% in 1988. The Fifth Malaysia Plan (1986-1991), announced in March 1986, has placed the onus on the private sector to be the engine of future growth.

FOREIGN POLICY ORIENTATIONS

Dr. Mahathir has set Malaysian foreign policy priorities in the following order of importance: 1) ASEAN; 2) the Islamic Conference Organization; 3) the Non-Aligned Movement; and 4) the Commonwealth. Malaysia initiated and has been active in promoting the concept of a "Zone of Peace, Freedom and Neutrality" (ZOPFAN) in the Southeast Asian region. With Indonesia, it initiated the Kuantan Principle which attempted to draw Vietnam closer to the Southeast Asian grouping. Malaysia has been active in supporting producer country positions on international commodity issues. Finally, high priority has been given to the development of stronger economic links with Japan and Korea.

CANADA-MALAYSIA RELATIONS

Commonwealth links, Canada's strong interest and support for ASEAN and development assistance have been the principal features of the relationship between the two countries. In 1986, a General Agreement on Development Assistance was signed; it is expected that it will put Canada in an excellent position as a source of expertise and capital equipment for development. Trade between Canada and Malaysia is carried out under the General Agreement on Tariffs and Trade; Malaysia benefits from Canada's General Preferential Tariff in favour of developing countries. Canadian exports to Malaysia totalled \$118.3 million in 1987, while imports were valued at \$187.2 million. There are approximately 3,500 Malaysian students currently studying in Canada, a substantial decrease from 6,000 a few years ago. Dr. Mahathir came to Canada in September 1987 to attend the Commonwealth Heads of Government Meeting (CHOGM) held in Vancouver.

Malaysia is highly dependent upon exports of primary products such as rubber, tin and palm oil. In 1988, GNP growth was 3.2% compared to 2.7% in 1987; it reached 2.5% in 1987 and is expected to reach 4% in 1988. The Fifth Malaysia Plan (1988-1991), announced in March 1988, has placed the onus on the private sector to be the engine of future growth.

FOREIGN POLICY ORIENTATION

Dr. Mahathir has set Malaysian foreign policy priorities in the following order of importance: 1) ASEAN; 2) the Islamic Conference Organization; 3) the Non-Aligned Movement; and 4) the Commonwealth. Malaysia insisted and has been active in promoting the concept of a "Zone of Peace, Freedom and Neutrality" (ZEPFAN) in the Southeast Asian region. With Indonesia, it insisted the Korean Principle which attempted to draw Vietnam closer to the Southeast Asian grouping. Malaysia has been active in supporting producer country positions on international commodity issues. Finally, high priority has been given to the development of stronger economic links with Japan and Korea.

TRADE OVERVIEW

Improving commodity prices and prudent debt management are nudging the Malaysian economy back into modest growth, predicted in the October 1987 government budget at 2% for 1987 and 4% for 1988.

Of immediate interest to small and medium sized Canadian firms is the indication that Malaysia will import CDN \$15 billion in goods in 1988 to meet industry and consumer demand. Canada's share of the Malaysian market has historically been about 1%. Our technology however is comparable to our competition and in several sectors we are leaders. In 1987, Canadian exports to Malaysia were worth \$118.4 million, some 14% more than during 1986, when they amounted to \$103.6 million. Imports from Malaysia went up 25.3% from 149.6 million in 1986 to \$187.3 million in 1987.

Canada had an info booth at the Defence Services - Asia exhibition (March 1988). In February of 1987 there was an incoming telecommunications mission from Malaysia; and an outgoing mission/seminar on remote sensing which went to Malaysia. In addition, Malaysia took part in a number of ASEAN-wide incoming missions, i.e., Food Processing and Packaging, Livestock, Rural Telecommunications, Power Transmission and Distribution, and ASEAN MTN study visit. Under NTS, the market study on medical equipment and supplies and the study on security products have been completed. Other market studies have been completed and are being printed.

Regarding the MTN, Malaysia's views are coloured by the fact that the Malaysian economy depends heavily on commodity exports. Accordingly, Malaysian objectives are fixed on improved market access through negotiations in the tropical products, agriculture and natural resources groups.

CANADIAN MARKETING OBJECTIVES

The following sectors offer excellent potential for Canadian exporters:

1. Communications and Informatics: With the privatization of the telephone company, the priority is on upgrading its technical and managerial skills, modernization, expansion of and introduction of a range of value added services. Upgrading broadcasting services and introduction of remote sensing technology are also proceeding.

2. Agriculture and Food Products and Services: Growing population, rising per capita income, rapid urbanization has created a greater demand for food products which Malaysia

continues to import (CDN \$1.7 billion annually). Foreign purchases will remain significant as will opportunities for sale of food processing equipment, technology and livestock credits.

3. Power and Energy Equipment and Services: Malaysia Gas Development programs include the CDN \$1 billion Peninsular Gas Pipeline Project, CNG stations and residential distribution system offering prospects for consulting services and equipment. Petronas signed five new exploration and production agreements and seismic services, offshore drilling equipment, will be required.

4. Power and Energy Equipment and Services: The National Electricity Board, SEB and SESCO are proceeding with a program for extension and reinforcement of power transmission and distribution networks, system operation efficiency improvement projects, plant conversions from oil to gas. Plans also going ahead for system interconnections with ASEAN neighbours.

5. Transportation Systems, Equipment: National Transportation Study (with involvement of Canadian consultants) being carried out to define development strategy for all transport modes over the next twenty years. Implementation program should present opportunities for consultants and suppliers of equipment to railways, airports, ports, etc.

6. Defence Products: Defence spending expected to increase by mid-1988 following budget review. With Canadian participation at DSA '88 in March and Defence Mission planned, there should be renewed interest in purchase of Canadian defence products in Canada.

TRADE CONTACTS:

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FACT SHEET - MALAYSIA

March 1988

Area: 329,744 sq. km.

Population: 16.1 million (1986)

Capital: Kuala Lumpur

System of Government: Constitutional Monarchy

Head of State: Yang di-Pertuan Agong, Sultan Iskandar

Prime Minister: Dato Seri Dr. Mahathir Mohamad

Minister of Trade/Industry: Datin Paduka Rafidah Aziz

Language: Bhasa Malaysia, English, Chinese, Tamil

Ethnic Background: Malay 50%, Chinese 33%, East Indian 10%, indigenous tribes 7%

GDP: (1986) US \$27.7 B

Per Capita Income: US \$1,720

Currency: Mlsian Ringgit = Cdn \$0.50

Inflation Rate: 0.7%

Unemployment Rate: 9%

Debt Service Ratio: 18.8% (1986)

Major Trading Partners (1986):

Exports (Total: US \$13.8 billion)

- 1. Japan \$3.1 b
- 2. Singapore \$2.4
- 3. USA \$2.3
- 4. S. Korea \$0.7
- 5. W. German \$0.5

Imports (Total: US \$10.8 billion)

- 1. Japan \$2.2 b
- 2. USA \$2.0
- 3. Singapore \$1.6
- 4. U.K. \$0.5
- 5. W. German \$0.5

Canadian Trade Statistics: (Cdn \$ 000's)

	1985
Exports	204,350
Imports	146,067
Balance	+ 58,283

	1986	1987
Exports	103,645	118,387
Imports	149,630	187,277
Balance	- 45,985	- 68,890

Major Cdn Exports (1987)

- Potassium chloride, muriate
- Newsprint and paper
- Wood pulp
- Asbestos
- Telephone apparatus equip & parts

Major Cdn Imports (1987)

- Crude natural rubber, except latex
- Clothing
- Textile fabrics
- Tuna, canned
- Transformers, electronics type and parts

Main Sectors of Opportunity for Canadian Business:

- 1. Communications and informatics
- 2. Agriculture and food products and services
- 3. Oil and gas equipment and services
- 4. Power and energy equipment and services
- 5. Transportation systems, equipment

EDC Status: on cover

CIDA Status: Category II

Resident Canadian Banks: Bank of Nova Scotia

Canadian Reps in Malaysia:

High Commissioner - Manfred von Nostitz
Commercial Counsellor - Mark Romoff

Telex: (Destination code 84) 30269
Fax: 60-3-2613428

Department of External Affairs/PST Trade Contact: Roman Hruba (613) 992-0959

Malaysia Reps in Canada:

High Commissioner - Tan Sri Datuk Thomas Jayasurya
Commercial Reps - Toronto

MAJOR CANADIAN EXPORTS TO MALAYSIA

('000s)

	1985	1986	1987
Potassium chloride, muriate	18,465	19,072	26,204
Newsprint paper	12,074	15,553	16,048
Unclassifiable exports	9,322	10,667	9,974
Wood pulp	900	3,154	8,768
Asbestos	5,033	4,667	7,540
Telephone apparatus eqpt & pts	7,056	4,846	3,167
Soya beans	1,192	1,662	2,885
Polyethylene resins	2,174	2,601	2,679
Wrap paper, unbl. sulphite/sulphate	4,233	1,016	2,660
Alcohols and their derivatives	2,013	3,326	2,473
Rapeseed oil	-	-	2,178
Sheet & strip carb steel hot rolled	-	-	1,961
Writing & reproduction paper	16	-	1,947
Parts for pulp and paper indus. machy	141	2,496	1,871
Plastic & syn rubber not shaped nes	383	521	1,675
Alberta winter wheat, exc. seed	-	-	1,670
Semi-conductors and parts	179	1,846	1,652
Groundwood printing paper nes	26	-	1,637
Rubber-coated tire fabrics	735	741	1,502
Card punch sort tab computers & pts	2,730	1,949	1,416
Zinc blocks, pigs and slabs	2,411	1,188	1,260
Pulp and paper industry machinery	104,081	10,457	1,182
Red spring wheat nes, except seed	11,300	-	985
Man-made fibres nes	441	1,819	616
Aircraft assemblies eqpt & pts nes	1,060	1,104	494
Textile fabrics	1,091	-	279
Gen. purpose indus. machy & pts nes	33	1,262	1
Motor vehicles nes	1,474	107	-
Sulphur, crude or refined nes	2,533	-	-
Sub-Total of	191,096	90,054	104,724
Total	204,350	103,781	118,387

COMPOSITION BY CLASSIFICATION

	1985		1986		1987	
	\$'000s	%	\$'000s	%	\$'000s	%
I Live animals	55	-	6	-	23	-
II Food products	13,289	6	3,206	3	4,654	4
III Crude material, inedible	9,510	5	8,762	8	11,605	10
IV Fabricated material, inedible	47,204	23	51,351	50	74,990	63
V End products	124,961	61	29,755	29	17,113	15
VI Special transactions	9,331	5	10,701	10	10,002	8
	204,350	100	103,781	100	118,387	100

MAJOR CANADIAN IMPORTS FROM MALAYSIA
('000s)

	<u>1985</u>	<u>1986</u>	<u>1987</u>
Crude natural rubber, except latex	35,084	30,885	40,166
Clothing	21,005	23,607	32,397
Tuna, canned	2,476	10,414	13,526
Textile fabrics	9,564	15,450	11,679
Transformers, electronic type & pts	2,847	4,019	7,207
Palm kernel oil	8,373	4,047	5,676
Palm oil	18,592	4,485	4,456
Windows, door & window frames, wood	2,453	3,322	4,228
Millwork nes	980	1,134	3,915
Electronic eqpt components nes	1,395	3,450	3,764
Semi-conductors	1,213	1,216	3,755
Radio receiving sets nes, exc. pts	2,426	3,958	3,701
Combination radio-phonograph sets	475	3,969	3,433
Microwave ovens	-	3,918	3,427
Toys and games	2,154	2,015	3,339
Crabs, canned	363	1,419	3,062
Telephone apparatus eqpt & parts	4,358	3,408	2,867
Urea	-	-	2,408
Gloves and mittens	2,456	2,944	2,148
Clams, canned	395	444	2,137
TV receiving sets colour under 19 in.	3,883	3,347	2,100
Coconut oil	6,870	347	2,077
Bauxite ore	-	-	1,452
Electronic computers & pts	53	597	1,333
Goods returned within 5 years	718	210	1,318
Capacitors, electronic & pts	1,092	1,019	1,086
Integrated circuits	1,506	1,352	1,064
Rubber sheeting nes	1,358	952	899
Fuses fuse plugs cutout elec. & pts	2,079	1,065	819
Used tractors	-	1,826	-
Sub-Total	134,168	134,819	169,439
of	-	-	-
Total	<u>146,067</u>	<u>150,204</u>	<u>187,277</u>

(Source: Statistics Canada)

PHILIPPINES

PHILIPPINES

The Philippines is an archipelago of more than 7,000 islands with a population of approximately 60 million. It has extensive natural resources in minerals, agriculture and fisheries, and a reasonably well trained industrial work force. However, the manufacturing and industrial base was greatly damaged during the Marcos regime by the economic mismanagement and corruption. Since the People's Revolution of 1986, there have been some steps taken in the economy, reversing the earlier deterioration of economic activity which had become evident as early as 1970. Some progress has been made in political and economic reforms, but a lack of stability in the political arena, particularly in the Executive, and the widespread social inequality, have hindered the economic growth. By popular demand, the government has initiated a land reform, by the passage of the Comprehensive Agrarian Reform Law, which provides for the redistribution of land to the tillers of the soil. The government has also initiated a program of industrialization and export promotion, but the results have been mixed. The government has also initiated a program of social reform, but the results have been mixed. In particular, the government has initiated a program of social reform, but the results have been mixed.

PHILIPPINES

Over the past 10 years, the Philippines has made a significant effort in addressing the economic, social and political issues. One of the major achievements has been the passage of a presidential decree which created a new political structure. President Aquino has initiated a series of reforms, including the reorganization of the government, the abolition of the military dictatorship, and the implementation of a new constitution. The government has also initiated a program of social reform, including the implementation of a land reform program, the abolition of the death penalty, and the implementation of a new labor law. The government has also initiated a program of economic reform, including the implementation of a new tax system, the abolition of the military dictatorship, and the implementation of a new labor law.

The new People's Party (PPP) was formed in 1984, and it has been the dominant political force in the Philippines. The PPP has been successful in implementing a series of reforms, including the implementation of a land reform program, the abolition of the death penalty, and the implementation of a new labor law. The government has also initiated a program of economic reform, including the implementation of a new tax system, the abolition of the military dictatorship, and the implementation of a new labor law.

The government has also initiated a program of social reform, including the implementation of a land reform program, the abolition of the death penalty, and the implementation of a new labor law. The government has also initiated a program of economic reform, including the implementation of a new tax system, the abolition of the military dictatorship, and the implementation of a new labor law.

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PHILIPPINES

Introduction

The Philippines is an archipelago of some 7,000 islands with a population of approximately 56 million. It has extensive natural resources in minerals, agriculture and fisheries, and a reasonably well trained industrial work force. However, the manufacturing and industrial base was greatly weakened during the Marcos regime by financial irregularities and excesses. Since the Aquino government came to power in February 1986, there have been some signs of growth in the economy, reversing the earlier shrinkage in economic activity which had become evident as early as 1982. Future prospects are clouded by political uncertainty occasioned by a lack of loyalty in certain pro-Marcos groups within the Armed Forces, and the strength more generally of the pro-Marcos lobby in certain areas; by popular dissatisfaction with the progress of land reform; by the communist insurgency; and by the agitation for Muslim autonomy in southern provinces. As long as the resolution of these issues is perceived to remain elusive the hope for business and foreign investment is not likely to materialize in the volumes needed to sustain economic growth and the governments burden of servicing foreign debt will continue to be substantial. Nonetheless, President Aquino in particular, and the Government more generally, enjoys continuing strong and widespread popularity and support.

Political and Economic Situation

Over the past two years the Aquino government has made a start on addressing the major issues facing the government and the nation. One of the most urgent is land reform, for which a presidential commission has been created and on which President Aquino has issued an executive order initiating the reform process. This has been one of the first items of business for the new Congress which is expected to consider legislation regarding holding limitations, land distribution and program duration.

The New People's Army (NPA), the military wing of the Communist Party of the Philippines (CPP), continues to be an active insurgency movement. Recently the NPA has adopted the strategy of utilizing assassination squads, principally in Manila, as a means of keeping itself in the public eye and creating a sense of instability.

Another major issue facing the government is that of the Muslim autonomy movement in the southern islands. Although Muslims are a majority in only 4 or 5 provinces in the Muslim autonomy movement wants autonomy for 13 provinces. This remains a contentious problem.

Performance of the economy has rebounded dramatically under the Aquino government reaching a growth rate in 1986 of 1.5% after two years of negative growth and 5% in 1987. The growth has in large part been public sector led, with construction and public works experiencing high levels of activity. However, for this level of economic growth to be maintained, it will be essential for the government to

revitalize the productive sectors of the economy and to improve public sector finances and foreign exchange management. Additionally, it will be necessary to demonstrate continued political stability in order to attract the necessary domestic and foreign investment without which it will be difficult to sustain the level of economic growth recently achieved. The Government is placing a major focus on liberalizing the business environment and encouraging the private sector as the engine of economic growth.

Foreign Policy

While the Philippines retains close ties to the United States, it is a full and integral member of the Association of Southeast Asian Nations (ASEAN), a regional grouping which has demonstrated a strong cohesiveness and commonality of political purpose over the past twenty years. ASEAN as a regional body and as individual nations are supportive of general western interests in international fora, sharing a number of views with Canada on such matters as trade liberalization, Law of the Sea, and peace and disarmament.

The Philippines government, while adhering to a non-aligned status, recognizes the importance of the United States bases to regional security and stability. It has deliberately down played contentious differences with the U.S. on the form of future cooperation and agreements in the face of nationalistic calls for closure of the bases.

Canada-Philippines Relations

Canadian relations with the Philippines, bilaterally and in the context of ASEAN, are strong. Canada was one of the first countries to recognize the new Aquino government and was the first country to extend export credits to the new government (through the EDC). Canadian interest in the Philippines is high in part because of the large Filipino-Canadian community numbering approximately 130,000 and in part due to the tremendous goodwill that President Aquino has engendered internationally.

Following a visit by the Secretary of State for External Affairs, the Right Honourable Joe Clark in July 1986, Canada approved an allocation of \$100 million over five years in development assistance funding. Subsequently the Philippine's Minister of Education Quisumbing, Human Rights Commissioner Aportadera, and Commissioner of Good Government Diaz each visited Canada. Canadian visitors to the Philippines have included Senator Alistair Graham, a Parliamentary delegation lead by the Honourable Steve Paproski last November, a parliamentary working group on security affairs in February 1988, and Chief of Defense Staff Manson in December 1987.

The Government of Canada takes every opportunity to re-affirm its support for the Government of the Philippines as it addresses social and economic reform issues, reinvigorates the economy, restores the democratic process and strengthens democratic institutions.

TRADE OVERVIEW

The economy of the Philippines appears to be rebounding strongly from almost three years of negative growth. While GNP recorded a marginal positive growth of 0.13% in 1986, it grew by 5.1% in 1987. Investments (local and foreign) increased by approximately 10% in the first half of 1987 and a new Investment Code further liberalized tax incentives for newly established or expanding businesses. The major impediments to greater investment are: the perceived political instability, labour unrest, and ownership limitations. Most foreign investors want full control over their local investments which are now restricted by the equity limitations (40% foreign, 60% local - for most sectors) in the new constitution.

The Government of the Philippines is making good progress in its privatization, deregulation and import liberalization efforts. Agreement in principle has been reached with private and official creditors for rescheduling principal and interest payments on a major portion of the country's estimated \$29 billion external debt. Servicing the debt will still absorb 40% of the national budget and 45% of export earnings. To help reduce debt the Government has come up with some innovative debt to equity swap mechanisms. Increasingly, ODA in-flows are being applied to project implementation rather than simple balance of payment support. As part of the rescheduling with private bank creditors, the Government is expecting the renewal of a \$1-2 billion revolving Trade Credit Facility and additional foreign borrowing of approximately \$1 billion in 1988.

Prospects for Canadian Trade have improved considerably over the past year. Canadian exports for 1987 reached \$122 million which represents a 147% increase over the 1986 level and also an increasing share of the Philippine market. Six CIDA CPPF funded feasibility studies were approved and the provision of commodities under the CIDA bilateral program have already totalled \$15 million (delivered or contracted). The Canadian Wheat Board is again selling milling wheat and feed grains to Philippine feed and flour millers. EDC is back on cover for the Philippines and Canadian companies are pursuing opportunities in several large capital projects (Calaca II Thermal Power Station, PLDT Telephone Expansion Program, Semirara Coal Expansion Project, Light Railway Transit System, Rockwell Rehabilitation). Canadian investment prospects include a J.V. copper/gold mining venture with Lepanto and acquisition of 40% equity in a local bank by Bank of Nova Scotia.

CANADIAN MARKETING OBJECTIVES

Major sectors of importance in the Philippines are:

1. Power and Energy - Because of serious power shortages (caused by mothballing of nuclear plant and increasing demand), this sector enjoys the highest priority of the government. Many projects on the horizon are attracting I.F.I. and bilateral export and aid financing.
2. Telecommunications - Major expansion of the Metro Manila network is to begin soon. The backbone network throughout the country is in need of updating/expansion and a major effort is underway by government to increase service to rural areas. Satellite and sub-marine cable international links are being expanded/improved.
3. ASIAN Development Bank Procurement - AsDB procurement totals over \$1 billion annually; much of it in sectors where Canada has good capability, i.e., energy/power, transportation and communications. All procurement is under I.C.B. rules. Payment is guaranteed. Most lending is to public entities but the new private sector lending and equity division will open up new markets.
4. Agriculture and Food - Agricultural production for local and foreign markets is expanding rapidly. Agricultural monopolies in sugar, coconut and banana have been disbanded and combined with increasing consumer demand have led to higher returns for farmers. Prawn cultivation and new tropical crops are being introduced on former sugar lands.

TRADE CONTACTS

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* David McNamara - New Commercial Counsellor as of September, 1988.

FACT SHEET - PHILIPPINES

March 1988

Area: 300,439 sq km

Population: 57.4 million (1987) -15th most populous country

Capital: Manila

System of Government: Democracy

President: President Corazon Aquino

Vice President: Salvador Laurel

Minister of Trade and Industry: José Conception Jr.

Language: Tagalog, (English Widely spoken)

Ethnic Background: Mainly Malay, Chinese, also Indians, Japanese, Arabs, Spanish

GDP: US 32.5 B (1987)

Per Capita Income: US \$568 (1987)

Currency: peso = Cdn 6.3¢

Inflation Rate: 5.2% (1987) **Unemployment Rate:** 10.6% (1987) **Debt Service Ratio:** 30.5

Major Trading Partners (1987):

Exports (Total: \$5.3 billion)

1. USA
2. Japan
3. W. Germany
4. UK
5. Hong Kong

Imports (Total: \$6.0 billion)

1. USA
2. Japan
3. Hong Kong
4. Saudia Arabia
5. W. Germany

Canadian Trade Statistics: (Cdn \$'000s)

	1985	1986	1987
Exports	46.4	49.5	122.1
Imports	109.1	109.4	107.1
Balance	- 62.7	- 59.9	+ 15.0

Major Cdn Exports (\$Cdn) 1987

Red Spring Wheat nes, except seed	(21.4)
Iron-ore concentrated	(12.3)
Plastic & synthetic rubber	(10.5)
Sheet & strip carb hot rolled	(9.8)
Wood pulp	(8.4)
Urea	(7.9)

Major Cdn Imports (\$Cdn) 1987

Clothing	(31.6)
Coconut oil	(8.3)
Gloves & mittens	(8.1)
Pineapple, canned	(6.4)
Coconut, desiccated	(5.2)
Furniture	(4.2)
Tuna, canned	(4.1)

Main Sectors of Opportunity for Canadian Business:

1. Power
2. Telecommunications
3. Grains and oilseeds
4. Agriculture and food
5. Transportation

EDC Status: on cover

CIDA Status: Category I country (\$100 million program to be spent in 5 years)

Resident Canadian Banks: Bank of Nova Scotia (Equity participation)

Canadian Reps in the Philippines:

Ambassador - Russell Davidson
Commercial Counsellor - David Brown

Department of External Affairs/PST Trade Contact: Louise Branch (613) 995-7680

Philippines Reps in Canada:

Ambassador - Sergio Barrera, Ottawa, Consulates in Vancouver and Toronto

MAJOR CANADIAN EXPORTS TO THE PHILIPPINES
('000s)

	<u>1985</u>	<u>1986</u>	<u>1987</u>
Red spring wheat nes, except seed	-	-	21,459
Iron-ore concentrated	4,325	4,642	12,306
Sheet & strip carb hot rolled	-	5,768	9,895
Plastic & synthetic rubber not shaped nes	243	1,898	9,125
Wood pulp	8,709	4,921	8,469
Urea	-	-	7,924
Barley	-	-	7,847
Polyethylene resins	333	1,555	4,388
Potassium chloride, muriate	2,811	1,872	3,687
Man-made fibres nes	3,774	2,979	3,626
Zinc blocks, pigs & slabs	3,551	3,561	2,938
Alcohols & their derivatives	1,993	2,934	1,844
Ammonia anhydrous	-	-	1,635
Corrugating container board nes	628	992	1,607
Plastic film & sheet	101	168	1,497
Fertilizers & fertilizer mat. nes	-	-	1,201
Sulphur, crude or refined nes	1,106	994	730
Milk powder, skim milk	2,114	761	689
Semi-conductors & parts	1,689	237	161
Coal	2,816	2,786	-
Wheat, except seed, nes	-	2,454	-
Sub-Total of	<u>34,193</u>	<u>38,522</u>	<u>101,028</u>
Total	<u>45,792</u>	<u>49,477</u>	<u>122,095</u>

COMPOSITION BY CLASSIFICATION

	<u>1985</u>		<u>1986</u>		<u>1987</u>	
	<u>\$'000s</u>	<u>%</u>	<u>\$'000s</u>	<u>%</u>	<u>\$'000s</u>	<u>%</u>
I Live animals	560	1	449	1	257	-
II Food products	3,361	8	4,963	10	32,583	27
III Crude material, inedible	12,573	27	11,746	25	17,198	14
IV Fabricated material, inedible	21,649	48	27,111	55	61,520	50
V End products	6,532	14	4,803	8	10,164	9
V1 Special transactions	1,117	2	405	1	383	-
	<u>45,792</u>	<u>100</u>	<u>49,477</u>	<u>100</u>	<u>122,095</u>	<u>100</u>

(Source: Statistics Canada)

MAJOR CANADIAN IMPORTS FROM THE PHILIPPINES
('000s)

	<u>1985</u>	<u>1986</u>	<u>1987</u>
Clothing	22,985	29,201	32,021
Coconut oil	6,134	1,595	8,344
Gloves and mittens	8,268	9,391	8,205
Pineapple, canned	9,425	6,223	6,408
Coconut, desiccated	7,304	4,613	5,231
Furniture	2,735	3,763	4,528
Tuna, canned	7,574	3,075	4,112
Goods returned within 5 yrs	901	725	2,543
Textile fabrics	781	1,223	2,348
Footwear	2,946	1,950	2,267
Household baskets boxes cans & bags nes	1,486	1,593	2,257
Fruit juice concentrates, froz. & not froz.	127	1,347	2,125
Chrome in ores and concentrates	731	1,436	1,810
Lumber, mahogany	1,283	1,636	1,517
Electronic computers & parts	-	-	1,317
Windows, door & window frames, wood	2,159	1,454	1,082
Coffee, green	9,465	17,470	1,074
Millwork nes	646	1,082	767
Dolls, toys and parts	283	2,505	581
Pineapple juice, not concentrated	1,856	1,470	484
Integrated circuits	2,495	514	382
Wrist watches	2,886	35	1
Copper scrap	2,019	-	-
Sub-Total	94,489	92,301	89,404
of			
Total	<u>109,080</u>	<u>109,411</u>	<u>107,146</u>

(Source: Statistics Canada)

SINGAPORE

GENERAL INFORMATION

located at the tip of the Malay Peninsula; the island of Singapore and 14 adjacent islets constitute the Republic of Singapore, encompassing a total land area of 677 square kilometers. The country's population is predominantly Chinese (76%) with Malays, Indians and a variety of other ethnic groups making up the balance. Singapore is a unitary democracy.

POLITICAL AND ECONOMIC SITUATION

Since 1959, the People's Action Party (PAP) has held the reins of power. Lee Kuan Yew, the PAP's first Prime Minister and the country's first Prime Minister, led the PAP to a decisive victory in the 1959 general election. The PAP has since won every general election, and Lee Kuan Yew has served as Prime Minister for 31 years. The PAP's policies have been characterized by a dynamic and pragmatic approach to economic development, and the result has been a rapid and sustained economic growth.

With a highly educated and skilled workforce, Singapore has developed into a major financial and industrial center. The country's location, strategic position, and excellent infrastructure have attracted a number of multinational corporations to set up operations. Singapore's economic performance, measured by its Gross Domestic Product (GDP) and investment income, has reached a spectacular level. The country's annual average growth rate for 1980-1982 was 10.2%.

SINGAPORE

FOREIGN RELATIONS

Singapore has established friendly relations with all major powers. The country's foreign policy is based on the principle of non-alignment and neutrality. Singapore is a member of the United Nations, the Commonwealth of Independent States, the Association of South East Asian Nations (ASEAN), and the Organization for Economic Co-operation and Development (OECD). The country's foreign relations are characterized by a pragmatic and flexible approach to international affairs.

SINGAPORE

GENERAL INFORMATION

Situated at the tip of the Malay Peninsula, the island of Singapore and 54 adjacent islets constitute the Republic of Singapore, encompassing a total land area of 622 square kilometres. The country's population is predominantly Chinese (76%) with Malays, Indians and a variety of other ethnic groups making up the balance. Singapore is a parliamentary democracy.

POLITICAL AND ECONOMIC SITUATION

Singapore has been an independent republic since its separation from Malaysia in 1965. Although the Head of State is President Wee Kim Wee, executive power rests with the Prime Minister and his Cabinet. The People's Action Party (PAP) under Lee Kuan Yew, has won every general election since 1959, although the percentage of the party's popular vote dropped from 75% to 65% in the last two elections (1980 and 1984). It is generally recognized that Singapore's emergence as a dynamic trade and economic centre for Southeast Asia has been the result of the PAP's social and economic policies.

With no natural resources, Singapore has developed on the basis of an industrious labour force and a vital geographic location. Government objectives are to ensure Singapore's development as the foremost financial, communications and transportation services centre in the region. After real growth dropped to -2.6% in 1986, the government began pursuing a number of strategies to turn around this uncharacteristic performance, including cuts in property, corporate and personal taxes and increased public spending, as a result, real growth reached a spectacular 8.1% in 1987 and observers forecast a 6% growth rate for 1988.

FOREIGN POLICY ORIENTATION

Singapore's foreign policy is pragmatic. Its perception of issues is based primarily on the assessment of their relevance to the economic development of Singapore. Given its size, Singapore, as a member of ASEAN, has much to gain from the strengthening of the organization mechanisms to deal with international and political developments. As a nation depending extensively on international financial, commercial and trading relationships, issues such as protectionism, the international debt crisis, low commodity prices, the availability of investment funds and volatile oil prices are all of crucial interest to Singapore.

In both economic and political terms, Singapore has assumed an importance which belies its size. In international organizations, such as the UN, the IMF or GATT, Singapore has established a reputation for the reasonableness and moderation it has brought to bear on positions adopted by developing country groups, for example, with respect to issues arising within the North/South Dialogue. It is often the most forceful and articulate spokesman for ASEAN.

CANADA-SINGAPORE RELATIONS

Canada enjoys sound, if somewhat limited, relations with Singapore as a result of the Commonwealth bond, a similar outlook on international problems and Canada's support for ASEAN. Canadian exports to Singapore totalled \$167.9 million in 1987, compared to imports of \$261.0 million. Bilateral agreements cover investment, double taxation and EDC financing through the five major Canadian banks, which are all represented in Singapore. Singapore has demonstrated a high level of interest with regards to the Canada-U.S. Free Trade Agreement. Canada and Singapore renegotiated their bilateral air agreement in May 1987. Ontario and Quebec have both opened offices in Singapore. At the present time, there are an estimated 2,000 Singaporean students in various educational institutions across Canada. The Secretary of State for External Affairs was in Singapore in June 1987 for the ASEAN Post-Ministerial Conference. Prime Minister Lee Kuan Yew attended the Commonwealth Heads of Government Meeting in Vancouver in October 1987.

TRADE OVERVIEW

In 1986, according to Wharton Econometrics, Singapore imports amounted to USA \$23.6 billion and exports totalled about USA \$21.4 billion. In 1986, Canada's share of Singapore's imports was less than 0.5%, while our share of Singapore's exports was about 0.7%. During 1987, Canada's trade with Singapore has increased substantially. From 1986 to 1987 exports to Singapore have gone up from \$146.3 million to \$168.0 million (up 14.8%) while imports have also moved up from \$211.0 million to \$261.9 million (up to 24.1%).

In fiscal 1987-88 the Department of External Affairs sponsored the following activities in Singapore under PPP:

- info booth at INFORMATICS '87
- incoming software buyers' mission
- incoming investment mission
- info booth at Asian Aerospace '88

Under NTS, a tourism sector market study was sponsored. The Canada-Singapore Conference and the accompanying mission are being postponed until fiscal year 1988/89.

Regarding multilateral trade policy issues, secure market access is Singapore's chief objective. Singapore is a free trader for most goods and maintains a relatively open services market. Singapore will continue to be a prime mover behind ASEAN economic integration.

CANADIAN MARKETING OBJECTIVES

The following sectors offer excellent potential for Canadian exporters:

1. Communications and Informatics: With a labour force that by Asian standards is high-cost and highly skilled, government and industry are focussing their efforts on exploiting the opportunities of Information Technology as a new growth industry suited to the Singapore environment.
2. Defence Products and Services: Geo-political concerns require the maintenance of one of the region's best-equipped and trained armed forces. There are 55,000 men under arms and 150,000 reservists. There is an excellent market for Canadian defence products.
3. Agriculture and Food Products and Services: Although bulk food products (wheat, barley and soya beans) account for a high

percentage of total Canadian exports to Singapore, non-bulk items present a significant opportunity for growth as a result of a growing Westernised middle class and the continuing importance of tourism.

4. Transportation Systems, Equipment and Services:

With 44 scheduled international flight carriers and 34,146 flight arrivals in 1986, Singapore is the recognised regional aircraft service centre. Opportunities are good for increased exports of aircraft engines and parts, of avionics and simulators, and of maintenance and overhaul services.

5. Oil and Gas Equipment and Services: Despite the depressed state of the oil and gas industry regionally and worldwide, Singapore continues to be a good market for high-tech products and services destined for re-export. The refinery sector is operating at near capacity, and the potential is good for retrofit/replacement equipment and parts.

6. Consumer Products: Singaporeans are increasingly fitness-conscious, and the market for sporting goods - particularly gymnasium and athletic equipment - is very good. The potential for an increase in exports of both domestic and office furniture items is excellent.

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* Denis Comeau - new Commercial Counsellor as of September, 1988

FACT SHEET - SINGAPORE

March 1988

Area: 622 sq km

Population: 2.6 million (1986)

Capital: City State

System of Government: Constitutional
Parliamentary Democracy

Head of State: President Wee Kim Wee

Prime Minister: Lee Kuan Yew

Minister of Trade and Industry: Lee Hsien Loong

Language: English, Mandarin, Malay,
Tamil

Ethnic Background: Chinese 77%, Malay 15%,
East Indian 7%

GDP: (1986) US \$16.1 B **Per Capita Income:** US \$6,622 **Currency:** Spore Dollar =
Cdn \$0.63

Inflation Rate:(1986)1.9% **Unemployment Rate:** 6.5% (1986) **Debt Service Ratio:** 0.4%

Major Trading Partners (1986):

Exports (Total: US \$22.5 billion)

- 1. USA \$5.3 b
- 2. Malaysia \$3.3
- 3. Japan \$1.9
- 4. Hong Kong \$1.5
- 5. Thailand \$0.8

Imports (Total: US \$25.5 billion)

- 1. Japan \$5.1 b
- 2. USA \$3.8
- 3. Malaysia \$3.4
- 4. China \$1.4
- 5. Kuwait \$1.0

Canadian Trade Statistics: (Cdn \$ '000s)

	1985	1986	1987
Exports	106,388	146,304	167,992
Imports	210,491	210,030	261,904
Balance	-104,103	- 63,726	- 93,912

Major Cdn Exports 1987

- Rapeseed
- Potassium chloride, muriate
- Electronic tubes and parts
- Newsprint paper
- Soya beans

Major Cdn Imports

- Electronics computer and parts
- Refrigerator compressor units
- Combination radio-phonograph sets
- Clothing
- Heterocyclic compounds, nes

Main Sectors of Opportunity for Canadian Business:

- 1. Communication and informatics
- 2. Defence products and services
- 3. Agriculture and food products and services
- 4. Transportation systems, equipment and services
- 5. Oil and gas equipment and services

EDC Status: on cover

CIDA Status: not programme country

Resident Canadian Banks: Bank of Montreal, Bank of Nova Scotia, Canadian Imperial
Bank of Commerce, Royal Bank, Toronto Dominion Bank

Canadian Reps in Singapore:

High Commissioner - Sean Brady
Commercial Counsellor - Otch Von Finckenstein

Telex: (Destination Code 87) RS21277
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Department of External Affairs/PST Trade Contact: Roman Hruby (613) 992-0959

Singapore Reps in Canada:

High Commissioner - Kishore Mahbubani, at present time, contact should be made via
Singapore Permanent Mission in New York
Commercial Reps - Lim Chin Geok, The Standard Life Centre, 121 King St. West, Suite
1000, P.O. Box 9, Toronto, Ont., Canada M5H 3Z9, Tel: (416)363-8227

MAJOR CANADIAN EXPORTS TO SINGAPORE

('000s)

	1985	1986	1987
Unclassifiable exports	1,825	8,650	16,694
Rapeseed oil	325	-	15,915
Potassium chloride, muriate	17,828	1,863	12,467
Electronic tubes and parts	2,943	9,315	12,147
Newsprint paper	7,116	8,135	10,752
Soya beans	6,401	8,945	8,690
Aircraft engines, assemblies & parts	5,179	9,334	7,078
Zinc blocks, pigs & slabs	974	1,353	5,007
Card punch sort tab computers & pts	2,140	2,215	4,117
Telegraph apparatus eqpt & pts	1,432	3,168	3,686
Wrap paper, unbl. sulphite/sulphate	1,414	3,824	3,679
Liner board	897	3,575	3,099
Polyethylene resins	2,429	2,190	2,810
Telephone apparatus eqpt & pts	6,817	4,661	2,671
Platinum metals	-	197	2,138
Carpets in rolls	703	995	2,089
Wood pulp	464	1,035	1,811
Photographic eqpt & supplies nes	41	13	1,785
Plastic & synthetic rubber not shaped nes	226	743	1,625
Parts & access. for chain saws	499	1,241	1,563
Military weapons, ordnance & pt nes	4	272	1,552
Parts & access. for motor vehicles nes	665	2,034	1,511
Radioactive elements & isotopes	-	-	1,493
Red spring wheat nes, except seed	-	-	1,451
Commercial telecommu. eqpt nes	1,383	1,014	1,376
Nickel & alloy fabricated mat. nes	9	14	1,268
Writing & reproduction paper	302	-	1,251
Power boilers, equipment & parts	5	1,083	1,161
Wheat, except seed nes	-	-	1,139
Valves nes	90	275	1,042
Apples & crab apples, fresh	420	1,113	1,014
Models for demonstration etc. & pts	4,611	30,486	877
Files and rasps	989	1,198	808
Insulated wire & cable	847	1,116	623
Fine paper nes	492	1,105	596
Asbestos	2,194	1,222	589
Petrol, coal, gas prod mach. pt nes	631	1,473	525
Contractors equipment & tools	226	1,378	356
Measuring & controlling instr nes	372	2,413	348
Earth drilling & rel. mach & pts nes	1,700	501	340
Fuel oil nes	-	3,263	-
Sulphur, crude or refined nes	-	1,499	-
Plate, steel	132	1,426	-
Sheet & strip carb steel hot rolled	-	1,068	-
Urea	5,924	-	-
Hard spring wheat flour	2,742	-	-
Polystyrene resins	1,748	-	-
Sub-Total	85,139	125,405	139,143
of			
Total	106,388	146,304	167,992

MAJOR CANADIAN IMPORTS FROM SINGAPORE

('000s)

1987

1986

COMPOSITION BY CLASSIFICATION

	1985		1986		1987	
	\$'000s	%	\$'000s	%	\$'000s	%
I Live animals	1	-	-	-	-	-
II Food products	5,383	5	3,555	2	6,311	4
III Crude material, inedible	8,995	8	13,037	9	10,499	6
IV Fabricated material, inedible	47,851	45	36,228	25	73,403	44
V End products	42,104	40	83,455	57	60,716	36
VI Special transactions	2,054	2	10,029	7	17,063	10
	106,388	100	146,304	100	167,992	100

(Source: Statistics Canada)

MAJOR CANADIAN IMPORTS FROM SINGAPORE
('000s)

	1985	1986	1987
Electronic computers and parts	3,364	6,450	39,750
Refrigerator compressor units	18,060	22,027	25,518
Clothing	12,495	19,011	22,080
Combination radio-phonograph sets	15,857	14,235	21,146
Crude natural rubber, except latex	44,248	25,009	15,833
Heterocyclic compounds nes	15,588	20,262	13,174
Toys and games and parts	1,733	4,138	9,875
Electronic eqpt components nes	1,614	2,608	9,385
TV receiving sets	10,406	11,505	8,112
Telephone apparatus eqpt & parts	2,550	4,075	7,514
Radio receiving sets	3,517	3,754	5,997
Flat irons, electric & parts	6,811	4,679	5,541
Goods returned within 5 years	1,532	8,788	4,919
Textile fabrics	4,430	2,865	3,618
TV, radio & phonograph set chassis	1,207	-	3,522
Parts & access. for bicycles nes	-	1,340	3,485
Switchgear & protect equip & pts nes	828	4,013	3,164
Tape players, tape recorders exc. pt	3,250	3,852	3,099
Parts of electric cooking appl nes	6,268	5,419	2,922
Furniture	2,079	2,314	2,824
Fish and products	1,105	2,039	2,766
Air cond & refrig eqpt & pts nes	1,045	867	2,728
Wood fabricated materials nes	1,032	1,058	2,030
Feathers, downs and quills	1,799	2,449	1,891
Metal parts for loose-leaf binders	1,143	1,811	1,836
Repairs aircraft foreign facilities	-	319	1,755
Pepper, ground or unground	1,401	1,580	1,693
Tin blocks, pigs and bars	7,556	450	1,568
Printed circuit boards	80	347	1,297
Coffee, green	610	1,238	1,072
Calculating machines & parts	223	267	1,071
Disposable med. & surgical instr nes	865	923	1,064
Vegetable oils and fats nes	1,086	1,511	1,012
Parts of aircraft engines	2,426	948	987
Rock drill bits, rotary type	3,609	942	884
Tuners	1,509	997	582
Typewriters, electric	4,191	-	557
Television picture tubes	2,964	959	125
Aircraft, nes	755	1,050	-
Wire rods, steel, hot rolled	1,256	-	-
Sub-Total	190,492	186,418	236,396
of			
Total	201,491	210,030	261,904

(Source: Statistics Canada)

GENERAL INFORMATION

Thailand is a country of 70 million people living in the framework of a constitutional monarchy. The population is concentrated in the lowlands and the coastal areas. The country is a member of the Association of South East Asian Nations (ASEAN) and has been a member of the United Nations since 1946.

POLITICAL SITUATION

Thailand has a long history of internal political instability. Since 1977, the country has experienced a series of military coups. The current political situation is characterized by a military government. The military has been in power since the 1977 coup. The political system is a constitutional monarchy, but the military has a significant role in the government.

THAILAND

The Thai economy has shown a steady growth in the last few years. The main sectors of the economy are agriculture, industry, and services. The government has implemented various economic reforms to promote growth and development. The Thai government has also been active in international relations, particularly in the region of Southeast Asia.

INTERNATIONAL RELATIONS

Thailand has a long history of international relations. The country has been a member of the United Nations since 1946 and is a member of several other international organizations. Thailand has a strong relationship with the United States and has been a key ally in the region. The country has also been active in the Association of South East Asian Nations (ASEAN) and has played a significant role in the region's political and economic development.

THAILAND

GENERAL INFORMATION

Thailand is a country of 53 million people located at the crossroads of Southeast Asia. Eighty-five percent of the population lives in rural areas, and over 90% are Buddhist, 3% Muslim and less than 1% Christian. Thailand is the only country of Southeast Asia which retained its independence during the era of colonial rule and has one of the oldest surviving monarchies in the world with constitutional rule since 1932.

POLITICAL AND ECONOMIC SITUATION

Thailand has enjoyed improving internal stability since 1977 as a result of efforts by successive governments to create an efficient, moderate, civilian administration. Economic and development progresses have been fairly consistent and sustained as both the government and military have followed the King's inspirational lead in this area.

The current Prime Minister, Prem Tinsulanonda, has been in power since 1980. The present administration was formed after the July 1986 elections. Indications are that political stability will likely persist through mid-1988, as Thailand will celebrate King Bhumibol's 40th year of reign.

From 1974 to 1984, the Thai economy was one of the more resilient in Asia, with an average 7% growth in the annual GDP rate. Following a temporary downturn in 1985-86, the economy bounced back, registering significant gains in several areas. Real GDP growth reached 3.8% in 1986, and 6% in 1987. Observers are suggesting a possible 6 to 7% growth rate for 1988, with manufactured exports and tourism expected to be the main engines of that growth. The Thai Sixth Five Year Plan approved October 1, 1986 places emphasis on adding value to the resource base.

FOREIGN POLICY ORIENTATIONS

Thailand leans strongly to the West in its foreign policy. Relations with Western countries have benefited from international concern for Thailand's security in the face of Vietnamese pressure and Thailand's generous response to the Indochinese refugee exodus. ASEAN is a cornerstone of Thai foreign policy. As Thailand's domestic economy has become more directly affected by international economic developments, its foreign policy has placed more emphasis in that area. Thailand has been an active and moderating voice in the Group of 77, it has played a constructive role in international commodity fora and in the GATT Uruguay Round. Thailand is also a co-founder of the "G-14 Group" of fair agricultural producers. It is likely that Thailand will pursue the actual international activism trend which now characterizes its foreign policy.

CANADA/THAILAND RELATIONS

Canada's interest in Thailand dates from Canadian participation in the Indochina Control Commissions and the Colombo Plan in the 1950's. Relations have broadened over the years with Canada's increased interest in the Association of South East Asian Nations (ASEAN), its position as a major recipient of Indochinese refugees, and expanded trade.

Total Canadian exports to Thailand in 1987, were up from 1986, totalling \$169.2 million compared to imports of \$181.8 million. Trade between Canada and Thailand is carried out under the GATT. A Foreign Investment Insurance Agreement was signed in January 1983 and a Double Taxation Agreement in April 1984. The possibility of establishing an Economic Cooperation Agreement between Canada and Thailand is currently under consideration. Thailand is a beneficiary of Canada's General Preferential Tariff in favour of developing nations. The Thai government opened a Trade Promotion Office in Vancouver in 1985. In October 1986, air negotiations were concluded, allowing for direct passenger and air cargo services between Canada and Thailand. Thailand is Canada's dialogue co-ordinator with ASEAN until July 1988.

A new aid program for Thailand commenced in 1981 with a five year indicative planning figure of \$50 million, which has recently been increased to \$125 million. The Minister for External Relations signed seven memoranda of understanding worth \$20 million during her March 1987 visit to Thailand and announced approval in principle of a \$36 million industrial sector activities program entitled Enterprise Thailand.

The strength of the bilateral relationship is partially illustrated by the number of high level visits between the two countries. The Secretary of State for External Affairs will go to Thailand in July 1988 to attend the ASEAN PMC Meeting in Bangkok. There are approximately 300 Thai students in Canada.

TRADE OVERVIEW

The Thai economy has bounced back from the 1986 mini-recession. Buoyant earnings, especially from tourism, and low oil prices, have led to a surplus in the current account. There is high capital availability coupled with low interest rates; GNP grew by 5.7% in 1987 and is projected to reach 6% in 1988.

Substantial increases in expenditures on transportation and communications will show growth in 1988 and 1989 on such projects as Laem Chaban, Maab Taput (industrial complex); an elevated highway from Bangkok to the airport; major trunk roads through Bangkok to the north and south; rail links across the southern peninsula (linking Surathani and Phuket); upgrading of airports; and deep water port expansion at Songkhla (PM Prem's riding).

Thai export growth in 1988 is anticipated to be 25% over 1987 and its debt-service ratio will be trimmed back to 17%. The Ministry of Finance has serious plans to reduce tariffs on finished goods from 50 to 20% and on parts from 20 to 10%.

Canadian two-way trade in 1987 hit an all time high of \$395 million. Although raw materials continue to form the majority of Canada's exports to Thailand, the hitech/manufactured mix is improving. Priority market opportunities continue to exist in telecommunications, agro-processing, mining, power, oil and gas. Marketing efforts of traditional, competitively priced commodities should concurrently be exploited.

Thailand received just under US \$2 billion in new Japanese investment in 1987. This confirms Thailand's political and economic stability and the fact that servicing the market will be increasingly favoured from within. Canadian entrepreneurs should continue to seek joint ventures/licensing opportunities in this important newly industrializing nation in:

1. Communications and Informatics - Thailand will spend over \$800 million on telecom products and computer hardware and software in 1988.

2. Transportation Systems - The Bangkok Mass Rapid transit System, State Railway of Thailand expansion, CNG bus engine opportunities and Royal Thai Government proposed acquisition of aircraft all contribute to buoyant prospects in the transportation sector. Civilian airports of Bangkok, Chiangmai and Phuket will be upgraded in next two to three years.

3. Defence - The Defence Sector continues to receive the lion's share of the annual Thai budget. Procurement windows exist for de Havilland Aircraft, Canadair CL215, Airborne Surveillance Radar Systems, M-41 Tank Retro-fits, Pratt and Whitney engines, radio equipment (especially for the police), and further simulator sales for helicopters.

4. Power Equipment and Services - Thailand will double the existing 6,000 megawatts of installed electricity generating capacity by the end of the century.

5. Petrochemicals - The Eastern Seaboard Project is forging ahead in the development of the National Petrochemical Complex. Many opportunities for Canadian suppliers exist there, plus pipeline opportunities throughout Thailand.

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* Robert Vanderloo - new Commercial Counsellor as of September, 1988.

FACT SHEET - THAILAND

April 1988

Area: 513,115 km²

Population: 52 Million (1986 approx)

Capital: Bangkok (Krung Thep)

System of Government: Constitutional Monarchy

Head of State: HM King Bhumibol Adulyadej (Rama IX)

Prime Minister: General Prem Tinsulanonda

Minister of Commerce: Montree Pongpanit

Language: Thai/Chinese

Ethnic Background: Thai 80%; Chinese 10%; Malay 3%; Other 7%

GDP: 1986-US \$44.2 B

Per Capita Income: US \$830

Currency: Baht (100 Satang)
Cdn \$1 = approx 19.27 baht

Inflation Rate: 2.5% (1987)
Debt Service Ratio: (1987) 17%

Unemployment Rate: 6.5% (1987)

Major Trading Partners (1987):

Exports (Total: US \$11.6 billion)

1. Japan
2. USA
3. Netherlands
4. Singapore
5. Hong Kong

Imports (Total: US \$13.4 billion)

1. Japan
2. USA
3. Saudi Arabia
4. Singapore
5. Malaysia

Canadian Trade Statistics: (Cdn \$'000)

	1985	1986	1987
Exports	126,983	105,325	194,929
Imports	108,681	150,267	200,776
Balance	+ 18,302	- 44,942	- 5,857
% Change	+ 15%	+ 8%	+ 35%

Major Cdn Exports

- 1988
- Wood Pulp
 - Asbestos
 - Power Boilers
 - Aluminum ingots
 - Newsprint Paper
 - Plastic/synthetic rubber
 - Steel Plate

Major Cdn Imports

- Fish and products
- Clothing
- Textile fabrics
- Canned pineapple
- Gems and stones
- Rice
- Artificial and ornamental flowers

Main Sectors of Opportunity for Canadian Business:

1. telecommunications
2. transportation
3. energy - hydro and thermal; oil and gas
4. mining
5. agro-food processing
6. defence including aviation products

EDC Status: On cover

CIDA Status: CORE country (Category I)

Resident Canadian Bank: Bank of Nova Scotia, Bangkok - Robert Rayner

Canadian Reps in Thailand: Ambassador - L.A.H. Smith;
Commercial Counsellor - Richard Kohler
Telex: 82671 DOMCAN TH; Tel: (011-66-2) 234-1561/8

Department of External Affairs/PST Trade Contact: Nigel Godfrey Tel: (613) 995-7659

Thailand Reps in Canada: Ambassador - Manaspas Xuto (Ottawa); Tel: (613) 722-4444
Commercial reps: Ottawa, Toronto, Montreal, Edmonton, and Vancouver

MAJOR CANADIAN EXPORTS TO THAILAND

('000s)

	1985	1986	1987
Wood pulp	9,150	15,534	25,155
Asbestos	19,181	14,509	18,404
Power boilers, equipment & parts	1,631	3,461	17,567
Unclassifiable exports	23,479	10,463	16,901
Newsprint paper	9,852	16,270	14,687
Plastic & synthetic rubber not shaped nes	4,479	8,982	12,705
Plate, steel	1,963	1,780	12,024
Hydrocarbons & their derivatives nes	1,236	2,495	9,660
Steel scrap	2,743	-	6,940
Card punch sort tab computers & parts	716	481	5,073
Sulphur, crude or refined nes	10,754	1,723	5,200
Sheet & strip carb steel hot rolled	970	2,526	4,630
Polyethylene resins	2,753	1,327	4,118
Alcohols and their derivatives	1,125	2,200	3,067
Fish & fish products canned nes	63	351	3,024
Man-made fibres nes	3,705	1,828	3,013
Paper for printing, nes	136	463	2,505
Newsprint, beater stock, rejects	257	-	2,383
Aircraft engines assemblies & parts	1,274	1,355	2,316
Pts for construction mach eqpt nes	67	439	2,268
Files and rasps	2,160	1,869	2,006
Bars, steel, hot rolled	-	-	1,590
Contractors equipment & tools	2,409	1,734	1,477
Poultry farm apiary eqpt & pts nes	68	265	1,347
Commercial telecommu. eqpt nes	3,923	3,152	866
Milk, cream & by-prod, powdered nes	1,139	1,894	676
Zinc blocks, pigs & slabs	3,386	39	191
Measuring & controlling instr nes	1,125	32	5
Infant & junior foods	4,324	68	-
Military weapons, ordnance & pt nes	3,350	4	-
Sub-Total of	117,418	95,214	179,798
Total	126,983	105,325	194,929

COMPOSITION BY CLASSIFICATION

	1985		1986		1987	
	\$'000s	%	\$'000s	%	\$'000s	%
I Live animals	-	-	93	-	187	-
II Food products	5,943	5	3,201	3	4,908	3
III Crude material, inedible	37,392	29	19,114	18	36,831	19
IV Fabricated material, inedible	38,045	30	54,816	52	96,633	50
V End products	19,714	16	15,902	15	37,991	19
VI Special transactions	25,889	20	12,199	12	18,379	9
	126,983	100	105,325	100	194,929	100

(Source: Statistics Canada)

MAJOR CANADIAN IMPORTS FROM THAILAND
('000s)

	<u>1985</u>	<u>1986</u>	<u>1987</u>
Fish & products	24,784	43,287	69,360
Clothing	26,003	35,905	35,844
Textile fabrics	9,222	10,578	14,002
Pineapple, canned	11,968	10,732	12,068
Jewellery/findings, precious metals	912	2,638	8,674
Rice	4,487	6,183	5,363
Artificial & ornamental flowers etc.	2,201	3,512	4,021
Coffee, green	374	-	3,682
Upholstery leather	-	2,426	3,273
Gem & ornamental stones nes	2,465	3,539	2,820
Furniture	1,983	1,412	1,953
Electronic computers and parts	-	91	1,874
Footwear	831	1,251	1,781
Graders & road scrapers & parts	-	1,307	1,767
Crude natural rubber, except latex	370	547	1,632
Costume jewellery nes	338	677	1,334
Misc. end products nes	757	834	1,273
Goods returned within 5 years	1,439	1,356	1,164
Corn, canned	326	675	1,074
Gloves and mittens	1,721	853	1,070
Fruits, fresh nes, except berries	481	770	1,032
Toys & parts nes	313	558	1,016
Beans, dried nes	1,318	1,107	964
Packing, non re-usable	1,506	1,378	893
Dog & cat feeds, complete	1,545	913	446
Sub-Total	<u>95,344</u>	<u>133,339</u>	<u>178,380</u>
of	-----	-----	-----
Total	<u>108,681</u>	<u>150,267</u>	<u>200,776</u>

(Source: Statistics Canada)

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- 9 -

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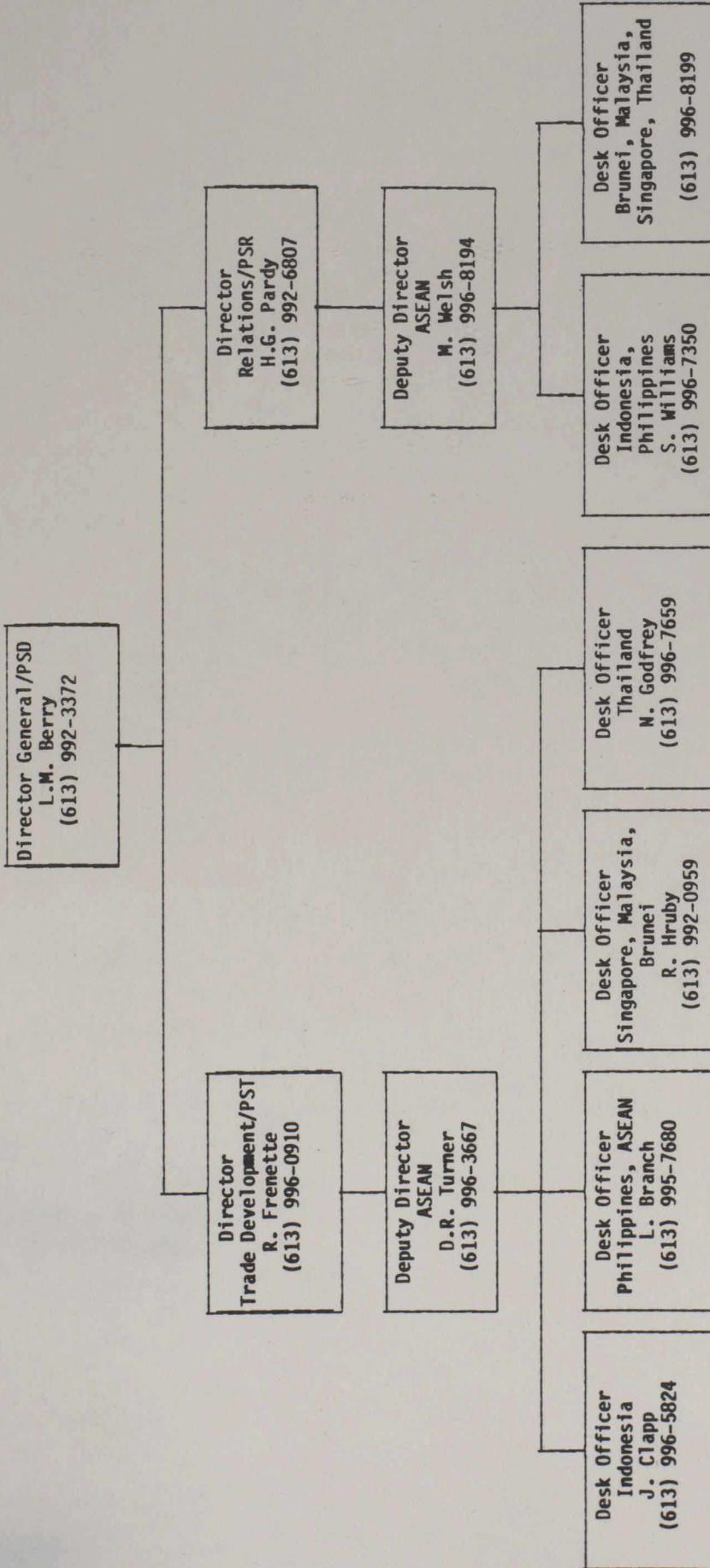
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