

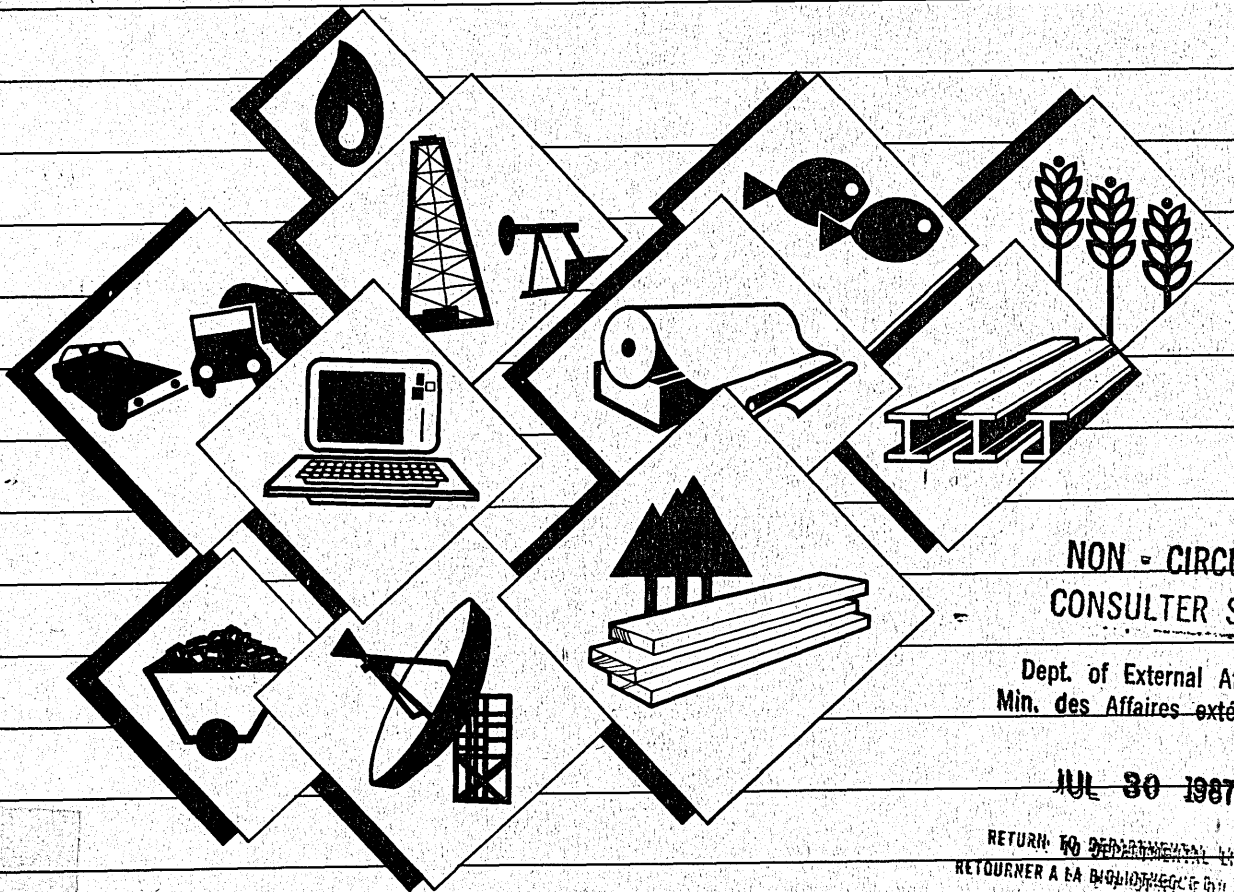


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GEOGRAPHICAL SYNOPSIS

WESTERN EUROPE

1987-88 EXPORT AND INVESTMENT PROMOTION OPERATIONAL PLAN



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Dept. of External Affairs
Min. des Affaires extérieures

JUL 30 1987

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MARCH 1987

GEOGRAPHIC SYNOPSIS OF
EXPORT PROMOTION PROGRAM PLANS
OF CANADIAN MISSIONS ABROAD
FY 1987/88

FOREWORD

This report contains a summary of the highlights of the proposed work plans of the export and investment promotion program of Canadian diplomatic missions worldwide for fiscal year 1987-1988 commencing April 1, 1987.

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

This synopsis is organized geographically and is available for each of seven geographic regions:

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

The synopsis provides a trade and economic overview of each country in the region in which market prospects exist for Canadian exporters, a listing of sectorial priorities for each market, profiles of important or interesting sectors and promotional project proposals which post trade officials recommend in support of their program activities.

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

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

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

43.246-132

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

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

In addition to the geographic perspective of this report, information from the data bank is available in a variety of configurations, the most important of which are synopses of 17 sectors and a variety of market reports. Information from these reports can be obtained on request from the geographic or functional bureaux of the Department of External Affairs.

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

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

ADDENDUM

Changes in Canadian Representation Abroad

As part of the Government's program of public service restraint to reduce costs, a decision was made to close seven missions abroad since the data contained in this report was compiled.

The affected missions are:

Quito, Ecuador
Helsinki, Finland
Abu Dhabi, United Arab Emirates
Hamburg, FRG
Marseille, France
Perth, Australia
Philadelphia, U.S.A.

The market plans for these missions (with the exception of Marseille which has not been required to prepare a plan) have been left intact for purposes of this report pending the redistribution of trade and investment responsibilities to neighbouring missions which is currently underway.

Export and Investment Promotion Planning System

REPT: SYN-GEO 87/88 List of missions/market covered in the following report

MISSIONS

ANKARA
ATHENS
ROME
MILAN
LISBON
MADRID
BERNE
PARIS
BRUSSELS
HAGUE, THE
VIENNA
BONN
DUSSELDORF
HAMBURG
MUNICH
HELSINKI
STOCKHOLM
OSLO
COPENHAGEN
DUBLIN
LONDON
Brussels NAC

MARKETS

TURKEY
GREECE
ITALY
ITALY
PORTUGAL
SPAIN
SWITZERLAND
FRANCE
BELGIUM
NETHERLANDS
AUSTRIA
GERMANY WEST
GERMANY WEST
GERMANY WEST
GERMANY WEST
FINLAND
SWEDEN
NORWAY
DENMARK
IRELAND
UNITED KINGDOM
N.A.T.O.

Export and Investment Promotion Planning System

87/88 Trade and Economic Overview

Mission: 401 ANKARA

Country: 548 TURKEY

THE OVERRIDING OBJECTIVE OF THE TID PROGRAM FOR TURKEY IS TO BROADEN AND DEEPEN TRADE RELATIONS BETWEEN CDA AND TURKEY. IN SUPPORT OF THIS OBJECTIVE, THE TID PROGRAM IS STRUCTURED TO IMPROVE MUTUAL UNDERSTANDING BETWEEN THE TWO COUNTRIES, ESPECIALLY CONCERNING WAYS IN WHICH THEIR RESPECTIVE ECONOMIES MAY COMPLEMENT EACH OTHER. IMPROVED UNDERSTANDING WILL, IN TURN, SUGGEST NEW AREAS FOR MUTUALLY BENEFICIAL TRADE AND INVESTMENT INITIATIVES. HISTORICALLY, CANADA HAS ENJOYED A SUBSTANTIAL FAVOURABLE TRADE BALANCE WITH TURKEY. THE TURKISH ECONOMY CONTINUED ITS RECENT PATTERN OF VERY RAPID GROWTH IN 1986. THE GOVT HAS MAINTAINED ITS CONCERN WITH SHOWING RESPONSIBLE FISCAL AND MONETARY RESTRAINT, EVEN AT THE EXPENSE OF SOME LOST POLITICAL SUPPORT AT HOME. NEVERTHELESS, A 3% DROP IN EXPORT EARNINGS, INCREASED IMPORTS AND A FALL IN FUNDS REPATRIATED TO TURKEY BY "GUEST WORKERS" ABROAD, HAVE ALL LED TO A PROJECTED INCREASE IN BOTH THE CURRENT ACCOUNT AND TRADE DEFICITS. THIS SITUATION HAS FOCUSED THE GOVT'S ATTENTION ON TRADE RELATIONS WITH THOSE COUNTRIES SUCH AS CANADA WHO ENJOY A PARTICULARLY HIGH FAVOURABLE BALANCE WITH TURKEY. IN 1985 CDN EXPORTS TO TURKEY TOTALLED \$219M, AGAINST IMPORTS OF APPROX. \$36M, OR A RATIO OF 6:1. AGAIN THIS YEAR, TURKISH ECONOMIC DEVELOPMENT IS CHARACTERIZED BY MANY LARGE SCALE CAPITAL PROJECTS. IT IS THE EXPRESSED INTENTION OF THE TURKISH GOVERNMENT TO PURSUE OVERALL ECONOMIC DEVELOPMENT BY MAJOR INVESTMENTS IN INFRASTRUCTURE, ESPECIALLY IN ELECTRICAL POWER DEVELOPMENT, OTHER ENERGY PROJECTS AND TRANSPORTATION. CAPITAL-INTENSIVE PROJECTS, SUCH AS LARGE-SCALE THERMAL POWER PLANTS, PLACE HEAVY DEMANDS ON FOREIGN CAPITAL MARKETS. AS IN PREVIOUS YEARS, THE PROVISION OF ADEQUATE FINANCING IS FREQUENTLY AN IMPORTANT DETERMINANT IN THE SELECTION OF THE WINNING BIDDER. WHILE EXPORTERS SHOULD BE AWARE OF THIS FACTOR, THEY SHOULD ALSO REALIZE THAT THERE ARE ALSO MANY SMALLER SCALE BUSINESS OPPORTUNITIES IN TURKEY IN WHICH THE AVAILABILITY OF FINANCING IS A LESS SIGNIFICANT FACTOR. AS A DEVELOPING COUNTRY, TURKEY HAS NEED FOR MOST GOODS AND SERVICES WHICH ARE PRODUCED IN TECHNOLOGICALLY-ADVANCED COUNTRIES SUCH AS CANADA. THE OPPORTUNITIES OFTEN REQUIRE IMAGINATION, PERSISTENCE AND FLEXIBILITY. AN EVER-EXPANDING NUMBER AND DIVERSITY OF CDN BUSINESS VISITORS WOULD TEND TO INDICATE THAT TURKEY IS, BEING DISCOVERED MORE BY CDN BUSINESSMEN. THIS TREND IS EXPECTED TO CONTINUE INTO THE COMING PROGRAM YEAR.

Export and Investment Promotion Planning System

REPT: SYN-GED 87/88 A. Post export program priorities

Region: WESTERN EUROPE

Mission: 401 ANKARA

Market: 548 TURKEY

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

1. 008 TRANSPORT SYS, EQUIP, COMP, SERV.
REASONS: URBAN TRANSIT IS VERY ACTIVE, WITH BUSINESS OPPORT. IN VIRTUALLY EVERY CITY. THE WHOLE OF TURKEY'S ROAD & RAIL NETWORKS ARE BEING UPGRADED. TRANSPORTATION HAS A HIGH PRIORITY WITH THE TURKISH GOVERNMENT.
2. 004 DEFENCE PROGRAMS, PRODUCTS, SERV
REASONS: THE NEWLY-CREATED DEFENCE INDUSTRIES FUND WILL BE USED TO FINANCE THE ACQUISITION OF A WIDE RANGE OF NEW DEFENCE EQUIPMENT.
3. 007 POWER & ENERGY EQUIP. & SERV.
REASONS: THERE IS AN AMBITIOUS PROGRAM FOR THE EXPANSION OF TURKEY'S ELECTRIC POWER GENERATION CAPABILITY. AT LEAST 20 NEW GENERATING STATIONS PLANNED + MAJOR UPGRADE OF COUNTRY'S POWER GRID.
4. 011 OIL & GAS EQUIPMENT, SERVICES
REASONS: TWO MAJOR GAS DISTRIBUTION PROJECTS ARE PLANNED, INCLUDING GAS DISTRIBUTION IN FOUR MAJOR CITIES. TURKEY ALSO HAS AN ACTIVE OIL EXPLORATION PROGRAM.
5. 010 MINE, METAL, MINERAL PROD & SRV
REASONS: PLANNED MAJOR UPGRADES OF COAL MINING FACILITIES & EXPANSION OF LIGNITE PRODUCTION. MODERNIZATION OF LEAD-ZINC PROCESSING PLANT & ALUMINIUM SMELTER. STRONG DEMAND FOR BASE METALS BY LOCAL INDUSTRY.

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

1. 005 COMM. & INFORM. EQP. & SERV
2. 010 MINE, METAL, MINERAL PROD & SRV
3. 016 INDUSTRIAL MACHIN, PLANTS, SERV.
4. 009 FOREST PRODUCTS, EQUIP, SERVICES
5. 001 AGRI & FOOD PRODUCTS & SERVICE

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 401 ANKARA

Market: 548 TURKEY

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	2000.00M	\$ 2000.00M	\$ 1800.00M	\$ 1700.00M
Canadian Exports \$	50.00M	\$ 0.30M	\$ 3.72M	\$ 1.75M
Canadian Share of Import Market	2.50%	0.02%	0.21%	0.10%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	050 %
ii) 128 GERMANY WEST	020 %
iii) 051 UNITED KINGDOM	010 %
iv) 038 BELGIUM	010 %
v) 112 FRANCE	005 %
vi) 237 ITALY	002 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) LOW LEVEL AIR DEFENCE SYSTEMS	\$ 0.00 M
ii) ARMoured PERSONNEL CARRIERS UPGRADE	\$ 0.00 M
iii) TACTICAL WHEELED VEHICLES	\$ 0.00 M
iv) TRANSPORTATION AIRCRAFT	\$ 0.00 M
v) COMMUNICATIONS & ELECTRONIC WARFARE EQUIP.	\$ 0.00 M
vi) WHEELED APC ARMY	\$ 0.00 M
vii) WHEELED ARMoured VEHICLES - GENDARMERY	\$ 0.00 M
viii) SKIDDOZERS	\$ 15.00 M
ix) SPECTRUM MONITORING SYSTEM	\$ 0.00 M
x) COMBAT NET RADIOS	\$ 0.00 M

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

i) Project Name: LOW LEVEL AIR DEFENCE SYSTEMS
Approximate Value: \$ 500 M
Financing Source: 023 EDC
For further info. please contact:
R. G. FARRELL TLX 607-42369

Export and Investment Promotion Planning System

MISSION: 401 ANKARA

COUNTRY: 548 TURKEY

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

ii) Project Name: ARMoured PERSONNEL CARRIERS UPGRADE

Approximate Value: \$ 50 M

Financing Source: 023 EDC

For further info. please contact:

CAN OZGUC TLX 607-42369

iii) Project Name: LIGHT TRANSPORT AIRCRAFT REQUIREMENT

Approximate Value: \$ 300 M

Financing Source: 023 EDC

For further info. please contact:

EXTAFF OTTAWA (613)995-6438

iv) Project Name: AIRCRAFT SIMULATOR (F 16)

Approximate Value: \$ 150 M

Financing Source: 023 EDC

For further info. please contact:

R. G. FARRELL TLX 607-42369

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

- exports of certain products or services to this country are subject to Canadian export controls
- the degree of import duty protection of local industry tends to be low

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

- non competitive pricing
- LACK OF KNOWLEDGE OF CANADIAN PRODUCTS AND CAPABILITIES

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

- aggressive marketing on the part of Canadian Exporters
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada
- the existence of a bilateral economic/trade arrangement between Canada and this country

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

Export and Investment Promotion Planning System

MISSION: 401 ANKARA

COUNTRY: 548 TURKEY

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

Activity: FOLLOW-UP ON CONTACTS MADE WITH PRESIDENT OF DIDS

Results Expected: INCREASE IN AWARENESS OF CANADIAN PRODUCTS AND CAPABILITIES.

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

Activity: ANALYSIS OF OPPORTUNITIES OFFERED UNDER TURKISH ARMY MODERNIZATION PROGRAM.

Results Expected: INCREASE AWARENESS OF CANADIAN DEFENCE PRODUCTS SUPPLY FIRM ON TURKISH REQUIREMENTS.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 401 ANKARA

Market: 548 TURKEY

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

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	450.00M	\$ 386.00M	\$ 235.00M	\$ 196.00M
Canadian Exports \$	120.00M	\$ 95.00M	\$ 94.00M	\$ 73.00M
Canadian Share of Import Market	26.00%	24.00%	40.00%	37.00%

Major Competing Countries

Market Share

i) 128 GERMANY WEST	020 %
ii) 577 UNITED STATES OF AMERICA	010 %
iii) 507 SWEDEN	004 %
iv) 265 JAPAN	010 %
v) 112 FRANCE	000 %

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

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects

Current Total Imports

In Canadian \$

i) TELEPHONE EQUIPMENT	\$ 250.00 M
ii) FIBER OPTICS	\$ 24.00 M
iii) DATA COMMUNICATION EQPT.	\$ 20.00 M
iv) TV TRANSMITTERS	\$ 18.00 M

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

i) Project Name: INSTALLATION OF FURTHER DIGITAL SWITCHING EQUIPT. AND TELEPHONE LINES

Approximate Value: \$ 250 M

Financing Source: 028 TO/DETER

For further info. please contact:

R. G. FARRELL TLX 607-42369

ii) Project Name: PTT DATA COMMUNICATION SYSTEM PROJECT

Approximate Value: \$ 20 M

Financing Source: 028 TO/DETER

For further info. please contact:

AKIN KOSETORUNU TLX 607-42369

Export and Investment Promotion Planning System

MISSION: 401 ANKARA

COUNTRY: 548 TURKEY

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

iii) Project Name: PTT FIBER OPTICS PROJECT

Approximate Value: \$ 24 M

Financing Source: 028 TO/DETER

For further info. please contact:

R. G. FARRELL TLX 607-42369

iv) Project Name: PTT INTEGRATED SERVICES DIGITAL NETWORK
(ISDN) PILOT PROJECT

Approximate Value: \$ M

Financing Source: 028 TO/DETER

For further info. please contact:

R. G. FARRELL TLX 607-42369

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

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

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

- No factors reported by mission

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

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

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

Activity: COMMERCIAL SUPPORT FOR A PROPOSED MAJOR CULTURAL EVENT - THE VISIT OF LES GRANDS BALLETS CANADIENS SPONSORED BY NETAS.

Results Expected: INCREASED ACCEPTANCE OF CANADIAN TECHNOLOGICAL CAPABILITY, ESPECIALLY IN THE COMMUNICATIONS - ELECTRONICS SECTOR.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 401 ANKARA

Market: 548 TURKEY

Sector: 007 POWER & ENERGY EQUIP. & SERV.

Subsector: 071 HYDRO

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	720.00M	\$ 500.00M	\$ 0.00M NA	\$ 0.00M NA
Canadian Exports \$	20.00M	\$ 0.00M	\$ 0.00M	\$ 0.00M
Canadian Share of Import Market	3.00%	0.00%	0.00%	0.00%

Major Competing Countries

Market Share

i) 265 JAPAN	030 %
ii) 599 YUGOSLAVIA	010 %
iii) 577 UNITED STATES OF AMERICA	005 %
iv) 112 FRANCE	010 %
v) 237 ITALY	010 %
vi) 128 GERMANY WEST	010 %

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

Current status of Canadian exports: No Export results to date

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) HYDRO ELECTRIC POWER SYSTEMS & EQUIP. TURBINES, GEN.	\$ 300.00 M

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

i) Project Name: LAMAS RIVER PROJECT (HEPP)
Approximate Value: \$ 20 M
Financing Source: 028 TO/DETER
For further info. please contact:
R. G. FARRELL TLX 607-42369

ii) Project Name: BOYABAT HEPP (510 MW)
Approximate Value: \$ 40 M
Financing Source: 028 TO/DETER
For further info. please contact:
AKIN KOSETORUNU TLX 607-42369

Export and Investment Promotion Planning System

MISSION: 401 ANKARA

COUNTRY: 548 TURKEY

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

iii) Project Name: OZKOY HEPP (150 MW)
Approximate Value: \$ 15 M
Financing Source: 028 TO/DETER
For further info. please contact:
EXTAFF OTT (613) 995-6438

iv) Project Name: 9 HEPPS INCLUDED IN SOUTH ANATOLIA
PROJECT
Approximate Value: \$ 1000 M
Financing Source: 001 IBRD 025 OTHER
For further info. please contact:
EXTAFF OTT (613) 995-6438

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

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

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

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies

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

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

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

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

Activity: CLOSE MONITORING & REPRESENTATION WITH GOVERNMENT AUTHORITIES IN ORDER TO PROMOTE CANADIAN CAPABILITY.

Results Expected: SUCCESS IN PREQUALIFICATION FOR TENDERS.

Export and Investment Promotion Planning System

MISSION: 401 ANKARA

COUNTRY: 548 TURKEY

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

Activity: CONTINUED CONTACTS WITH POTENTIAL LOCAL PARTNERS TO IDENTIFY AND ACTIVELY PURSUE NEW PROJECTS.

Results Expected: PROGRESS IN NEGOTIATIONS.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 401 ANKARA

Market: 548 TURKEY

Sector: 007 POWER & ENERGY EQUIP. & SERV.

Subsector: 072 THERMAL

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	500.00M	\$ 231.00M	\$ 1516.00M	\$ 1053.00M
Canadian Exports \$	0.00M	\$ 0.00M	\$ 0.00M	\$ 0.00M
Canadian Share of Import Market	0.00%	0.00%	0.00%	0.00%

Major Competing Countries

Market Share

i) 099 POLAND	020 %
ii) 088 CZECHOSLOVAKIA	020 %
iii) 265 JAPAN	020 %
iv) 128 GERMANY WEST	010 %
v) 553 UNION OF SOVIET SOC REP	010 %
vi) 237 ITALY	010 %

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

Current status of Canadian exports: No Export results to date

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) FOSSIL STEAM GENERATING EQUIPMENT	\$ 0.00 M
ii) COAL HANDLING SYSTEMS	\$ 0.00 M
iii) GENERATORS	\$ 0.00 M
iv) VALVES	\$ 0.00 M

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

i) Project Name: BEYSEHIR 370 MW THERMAL POWER PLANT
PROJECT (LIGNITE FIRED)

Approximate Value: \$ 600 M

Financing Source: 028 TO/DETER

For further info. please contact:

R.G. FARRELL TLX 607-42369

Export and Investment Promotion Planning System

MISSION: 401 ANKARA

COUNTRY: 548 TURKEY

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

ii) Project Name: SARAY 2X150 MW THERMAL POWER PLANT
PROJECT (LIGNITE FIRED)

Approximate Value: \$ 500 M

Financing Source: 028 TO/DETER

For further info. please contact:

C. OZGUC TLX 607-42369 OTT (613)996-6438

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

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

- non competitive pricing
- other factor(s) described by the Trade Office as follows:
RELUCTANCE TO APPROVE THE BUILD-OPERATE TRANSFER FORMULA

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

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

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

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

Activity: MEETINGS WITH STATE PLANNING ORGANIZATION (SPO) AND ELECTRICITY AUTHORITY (TEK) OFFICIALS TO PURSUE VARIOUS POWER PROJECTS IN WHICH THERE IS CANADIAN INVOLVEMENT.

Results Expected: PROGRESS IN CONTRACT NEGOTIATIONS.

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

Activity: THE PREPARATION OF AN OVERVIEW OF PLANNED THERMAL POWER PLANT PROJECTS AND AN ANALYSIS OF THE TURKISH GOVERNMENT'S CONTRACT TERMS DESIGNED FOR SUCH PROJECTS.

Results Expected: INCREASED AWARENESS OF CANADIAN POWER GENERATION EQUIPMENT SUPPLIERS' CAPABILITIES.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 401 ANKARA

Market: 548 TURKEY

Sector: 007 POWER & ENERGY EQUIP. & SERV.

Subsector: 073 NUCLEAR

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

Major Competing Countries

Market Share

i) 128 GERMANY WEST	000 %
ii) 075 CANADA	000 %
iii) 112 FRANCE	000 %
iv) 577 UNITED STATES OF AMERICA	000 %

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

Current status of Canadian exports: No Export results to date

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) CANDU REACTOR	\$ 0.00 M
ii) STEAM GENERATORS, NUCLEAR	\$ 0.00 M
iii) VALVES, NUCLEAR QUALITY	\$ 0.00 M
iv) PRESSURIZERS, REACTOR	\$ 0.00 M
v) PUMPS, NUCLEAR	\$ 0.00 M

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

i) Project Name: AKKUYU NUCLEAR POWER PLANT PROJECT

Approximate Value: \$ 1200 M

Financing Source: 023 EDC

For further info. please contact:

R.G. FARRELL TLX 607-42369

Export and Investment Promotion Planning System

MISSION: 401 ANKARA

COUNTRY: 548 TURKEY

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

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

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

- difficulties in obtaining credit facilities in Canada
- other factor(s) described by the Trade Office as follows:
DIFFICULTY IN AGREEING ON TERMS UNDER "BUILD OWN TRANSFER"
FINANCING MODEL FOR CANDU REACTOR.

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

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

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

Activity: CONTINUED MONITORING AND REPORTING OF WORLD ACCEPTANCE OF BUILD-OPERATE-TRANSFER (B. O. T.) FINANCING MODEL

Results Expected: POTENTIAL SALE OF CANDU REACTOR IF SUITABLE FINANCING PLAN CAN BE ACHIEVED.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 401 ANKARA

Market: 548 TURKEY

Sector: 007 POWER & ENERGY EQUIP. & SERV.

Subsector: 074 TRANSMISSION

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	100.00M	\$ 90.00M	\$ 123.00M	\$ 85.00M
Canadian Exports \$	1.00M	\$ 0.45M	\$ 0.30M	\$ 0.00M
Canadian Share of Import Market	1.00%	0.50%	0.24%	0.00%

Major Competing Countries

Market Share

i) 128 GERMANY WEST	015 %
ii) 237 ITALY	015 %
iii) 038 BELGIUM	015 %
iv) 599 YUGOSLAVIA	015 %
v) 499 SPAIN	015 %

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

Current status of Canadian exports: No Export results to date

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) CONS. SERV. TRANSM. PROJ. TRAINING	\$ 0.40 M
ii) TRANSMISSION LINE HARDWARE	\$ 0.00 M
iii) TRANSMISSION LINE STRINGING & MAINTENANCE EQPT.	\$ 0.00 M
iv) LOAD MANAGEMENT & EVALUATION SYSTEMS	\$ 0.00 M
v) POWER TEST AND CONTROL DEVICES	\$ 0.00 M
vi) POWER SIMULATORS	\$ 0.00 M
vii) CONS. SERV. FOR POWER PLANTS	\$ 0.00 M

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

- i) Project Name: REHABILITATION OF SOME OF EXISTING THERMAL GENERATION FACILITIES & TRANS. LINES

Approximate Value: \$ 242 M

Financing Source: 001 IBRD

For further info. please contact:

R.G. FARRELL TLX 607-42369

Export and Investment Promotion Planning System

MISSION: 401 ANKARA

COUNTRY: 548 TURKEY

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

ii) Project Name: EXTENSION IN CONS. SERV. PREVIOUSLY CONTRACTED TO ONT. HYDRO FOR TRANSM. PROJECT

Approximate Value: \$.7 M

Financing Source: 001 IBRD

For further info. please contact:

C. OZGUC TLX 607-42369 OTT (613)995-6438

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

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

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

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

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

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

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

Activity: MEETING WITH TURKISH ELECTRICITY AUTHORITIES (TEK) TO ASCERTAIN THEIR PLANS TO HIRE A CONSULTING/ENGINEERING FIRM FOR IBRD FINANCED POWER GENERATION PLANTS & TRANSMISSION LINE REHABILITATION PROJECT.

Results Expected: INVITATION BY TEK OF ONTARIO HYDRO OFFICIALS FOR DISCUSSIONS ON CONSULTANCY SERVICES.

Export and Investment Promotion Planning System

MISSION: 401 ANKARA

COUNTRY: 548 TURKEY

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

Activity: EXPANSION OF THE LIST OF POTENTIAL LOCAL AGENTS EXPERIENCED IN PROMOTION OF BUSINESS FOR TRANSMISSION LINE HARDWARE AND POWER LOAD MANAGEMENT SYSTEMS.

Results Expected: INCREASED NUMBER OF ACTIVE LOCAL AGENTS INTERESTED IN COOPERATION WITH CANADIAN SUPPLIES IN TEK TENDERS WILL IMPROVE SALES PROSPECTS.

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

Activity: THE PREPARATION OF AN OVERVIEW ON TEK'S TRANSMISSION LINE MATERIALS AND CONTROL/TEST DEVICE REQUIREMENTS.

Results Expected: INCREASED ATTENTION OF CANADIAN FIRMS TO TURKISH REQUIREMENTS.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 401 ANKARA

Market: 548 TURKEY

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

Subsector: 082 URBAN TRANSIT

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	390.50M	\$ 0.00M NA	\$ 0.00M NA	\$ 0.00M NA
Canadian Exports \$	80.50M	\$ 0.00M	\$ 0.00M	\$ 0.00M
Canadian Share of Import Market	20.60%	0.00%	0.00%	0.00%

Major Competing Countries

Market Share

i) 112 FRANCE	000 %
ii) 237 ITALY	000 %
iii) 128 GERMANY WEST	007 %
iv) 038 BELGIUM	000 %
v) 507 SWEDEN	072 %
vi) 553 UNION OF SOVIET SOC REP	000 %

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

Current status of Canadian exports: No Export results to date

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) URBAN TRANSIT SYSTEM HEAVY RAIL	\$ 0.00 M
ii) URBAN TRANSIT SYSTEM LIGHT RAIL	\$ 0.00 M
iii) URBAN TRANSIT CONSULTING	\$ 0.00 M

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

i) Project Name: ANKARA URBAN TRANSIT SYSTEM
Approximate Value: \$ 400 M
Financing Source: 023 EDC
For further info. please contact:
R.G. FARRELL TLX 607-42369

ii) Project Name: BURSA URBAN TRANSIT SYTEM
Approximate Value: \$ 150 M
Financing Source: 023 EDC
For further info. please contact:
C.OZGUC TLX 607-42369

Export and Investment Promotion Planning System

MISSION: 401 ANKARA

COUNTRY: 548 TURKEY

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

iii) Project Name: CONSULTING SERVICES ISTANBUL URBAN
TRANSIT SYSTEM

Approximate Value: \$.5 M
Financing Source: 012 DOM
For further info. please contact:
W. MCKENZIE (613)995-6438

iv) Project Name: CONSULTING SERVICES ANKARA URBAN
TRANSIT SYSTEM

Approximate Value: \$.5 M
Financing Source: 012 DOM
For further info. please contact:
W. MCKENZIE (613)995-6439

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

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

- difficulties of adaptation of marketing techniques to the market by some Canadian companies

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

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

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

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

Activity: COMPLETION OF A COMPREHENSIVE PACKAGE PROPOSAL, INCLUDING INDUSTRIAL BENEFITS, FINANCING AND COUNTERTRADE COMPONENTS.

Results Expected: CORRECT PACKAGE WILL RESULT IN A CONTRACT AWARD.

Export and Investment Promotion Planning System

MISSION: 401 ANKARA

COUNTRY: 548 TURKEY

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

Activity: ESTABLISHMENT OF A SPECIAL LINE OF CREDIT FOR URBAN TRANSIT/
TRANSPORTATION.

Results Expected: WILL PLACE CANADIAN FIRMS IN MOST FAVORED
SUPPLIER POSITION.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 401 ANKARA

Market: 548 TURKEY

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

Subsector: 084 RAIL

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	56.00M	\$ 52.00M	\$ 112.00M	\$ 56.00M
Canadian Exports \$	5.50M	\$ 0.00M	\$ 0.17M	\$ 0.10M
Canadian Share of Import Market	9.80%	0.00%	0.15%	0.19%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	035 %
ii) 128 GERMANY WEST	020 %
iii) 265 JAPAN	020 %
iv) 112 FRANCE	015 %
v) 051 UNITED KINGDOM	010 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are
good market prospects

Current Total Imports
In Canadian \$

i) CONSULTANCY SERVICES TO UPGRADE RAILWAY OPER.	\$ 0.04 M
ii) RAILWAY SIGNALIZATION/ELECTRIFICATION & TELECOM.	\$ 18.30 M
iii) TRACK OVERHAUL EQUIPMENT/MATERIALS	\$ 4.80 M

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

i) Project Name: EQUIP. & MATERIAL FOR SIGNALLING AND
TELECOMMUNICATIONS-700KM RAILWAY LINE

Approximate Value: \$ 42 M

Financing Source: 001 IBRD

For further info. please contact:

R. G. FARRELL TLX 607-42369 OTT(613)996-6439

Export and Investment Promotion Planning System

MISSION: 401 ANKARA

COUNTRY: 548 TURKEY

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

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

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

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies

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

- use of Canadian Government export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

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

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

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

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

Activity: FURTHER EDUCATION OF CDN SUPPLIER OF RAIL SUB-SECTOR EQUIP./MATERIAL ON TURKISH REQUIREMENTS & FOREIGN PROCUREMENT PRACTICES. CDN MANUFACTURING COMPANIES IN THIS SUB-SECTOR SHLD BE CONVINCED TO ASSIGN LOCAL AGENTS TO CLOSELY FOLLOW TENDERS/INQUIRIES

Results Expected: INCREASED FREQUENCY OF VISITS OF CANADIAN SUPPLIERS.

Activity: CONSULTANCY SERVICES REQUIRED FOR TURKEY'S IBRD FINANCED RAILWAY REHABILITATION PROJECT TO BE TENDERED IN DECEMBER '86. PREQUALIFIED CDN FIRMS ARE EXPECTED TO VISIT TERRITORY RELATED TO THEIR BID SUBMISSION.

Results Expected: CONTRACT FOR CONSULTANCY SERVICES. VISIT TO CANADA OF TURKISH RAILWAY ADMINISTRATION OFFICIALS PURSUANT TO CONTRACT.

Export and Investment Promotion Planning System

MISSION: 401 ANKARA

COUNTRY: 548 TURKEY

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

Activity: TO EXPLORE THE SUPPLY OPPORTUNITIES UNDER IBRD-FINANCED RAILWAY REHABILITATION PROJECT. OPPORTUNITIES INCLUDE SUPPLY OF SIGNALLING SYSTEMS, TRACK OVERHAUL EQUIPMENT AND MATERIAL.

Results Expected: VISIT TO TURKEY OF CANADIAN SUPPLIERS IN THIS SUB-SECTOR TO INTRODUCE THEIR FIRMS/PRODUCTS.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 401 ANKARA

Market: 548 TURKEY

Sector: 010 MINE, METAL, MINERAL PROD & SRV

Subsector: 102 MINERALS AND MINERAL PRODUCTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	879.00M	\$ 784.00M	\$ 835.00M	\$ 799.00M
Canadian Exports \$	80.00M	\$ 70.00M	\$ 79.00M	\$ 12.00M
Canadian Share of Import Market	9.10%	8.90%	9.40%	1.50%

Major Competing Countries

Market Share

i) 128 GERMANY WEST	015 %
ii) 265 JAPAN	015 %
iii) 512 SWITZERLAND	010 %
iv) 499 SPAIN	010 %
v) 035 ROMANIA	010 %
vi) 237 ITALY	010 %

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

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects

Current Total Imports

In Canadian \$

i) ALUMINIUM INGOTS	\$ 98.00 M
ii) SHEETS AND COILS, STEEL	\$ 505.00 M
iii) SCRAP METAL	\$ 226.00 M
iv) BLOOMS AND SLABS, STEEL	\$ 204.00 M
v) ASBESTOS	\$ 13.00 M
vi) BARS, STEEL	\$ 76.00 M

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

i) Project Name: SUPPLY CONTRACT FOR ALUMINIUM INFOTS FOR MANUFACTURING INDUSTRIES

Approximate Value: \$ 20 M

Financing Source: 001 IBRD

For further info. please contact:

R. G. FARRELL TLX 607-42369 OTT (613) 995-6438

Export and Investment Promotion Planning System

MISSION: 401 ANKARA

COUNTRY: 548 TURKEY

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

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

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

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

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

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

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

Activity: DEVELOP A COMPREHENSIVE LIST OF LOCAL AGENTS FOR MARKETING OF CANADIAN MINERAL AND PRIMARY METAL PRODUCTS.

Results Expected: EXPANSION IN NUMBER OF AGENTS; IMPROVEMENT IN CANADIAN ACCESS TO TURKISH MARKET.

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

Activity: INTRODUCTION OF CANADIAN MINERAL/PRIMARY METAL PRODUCTS SUPPLY CAPABILITY TO TURKISH METALLURGY FIRMS USING SUCH PRODUCTS AS INPUTS TO THEIR PRODUCTION AND TO IMPORTERS.

Results Expected: INCREASED FAMILIARITY OF TURKISH MARKET WITH CANADIAN PRODUCTS; INCREASE IN SALES POTENTIAL

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 401 ANKARA

Market: 548 TURKEY

Sector: 010 MINE, METAL, MINERAL PROD & SRV

Subsector: 106 EQUIPMENT AND MACHINERY

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	250.00M	\$ 233.00M	\$ 220.00M	\$ 200.00M
Canadian Exports \$	5.00M	\$ 0.90M	\$ 0.20M	\$ 0.40M
Canadian Share of Import Market	2.00%	0.40%	0.09%	0.20%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	025 %
ii) 128 GERMANY WEST	015 %
iii) 051 UNITED KINGDOM	010 %
iv) 265 JAPAN	010 %
v) 237 ITALY	005 %
vi) 507 SWEDEN	005 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) METHANE GAS EXTRACTION PROCESS EQUIPMENT	\$ 0.00 M
ii) METAL EXPLORATION AND DRILLING EQUIPMENT	\$ 148.00 M
iii) METAL WORKING MACHINERY	\$ 85.00 M
iv) METALLURGICAL EQUIPMENT	\$ 0.00 M

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

i) Project Name: MODERNIZATION OF AN ALUMINIUM SMELTING COMPLEX

Approximate Value: \$ 100 M

Financing Source: 023 EDC

For further info. please contact:

R. G. FARRELL TLX 607-42369

Export and Investment Promotion Planning System

MISSION: 401 ANKARA

COUNTRY: 548 TURKEY

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

ii) Project Name: MODERNIZATION OF A LEAD-ZINC PRODUCTION PLANT

Approximate Value: \$ 85 M

Financing Source: 023 EDC

For further info. please contact:

C. OZGUC TLX 607-42369 OTT(613)996-6439

iii) Project Name: UPGRADING AN EXISTING METHANE GAS EXTRACTION FACILITY

Approximate Value: \$ 30 M

Financing Source: 023 EDC

For further info. please contact:

OTT(613)996-6439 R. G. FARRELL TLX 607-42369

iv) Project Name: COAL WASHERY FACILITY

Approximate Value: \$ 5 M

Financing Source: 012 DOM

For further info. please contact:

OTT (613)996-6439 R. G. FARELL TLX 607-42369

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

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

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

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

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

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

Export and Investment Promotion Planning System

MISSION: 401 ANKARA

COUNTRY: 548 TURKEY

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

Activity: FURTHER FOLLOW-UP ON ETIBANK'S (STATE MINING AUTHORITY) ALUMINIUM SMELTING COMPLEX REHABILITATION PROJECT. FOLLOW-UP, WILL INCLUDE VISIT TO PLANT LOCATED IN THE CITY OF BEYSEHIR.

Results Expected: CONTRACT FOR PROJECT MANAGEMENT

Activity: MEETING WITH OFFICIALS OF STATE-OWNED LEAD-ZINC PLANT(CINKUR) REGARDING THEIR PRODUCTION LAY OUT MODERNIZATION PROJECT.

Results Expected: INVITATION TO CANADIAN INDUSTRY FOR DETAILED DISCUSSION ON THE SCOPE OF THIS MODERNIZATION PROJECT.

Activity: VISIT TO TURKISH HARD COAL BOARD(TTK)LOCATED IN CITY OF ZONGULDAK FOR PURPOSE OF HAVING DISCUSSIONS ON TTK'S METHANE GAS EXTRACTION PROJ. FOR WHICH A GROUP OF ENGINEERS FM NOVACORP INTL/CALGARY ARE CURRENTLY PREPARING A FEASIBILITY STUDY.

Results Expected: CONTRACT DECISION FOR PROJECT MANAGEMENT AS WELL AS SUPPLY OF METHANE GAS EXTRACTION EQUIPMENT. N

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

Activity: AN ANALYSIS OF LOCAL METAL FABRICATION INDUSTRY'S REQUIREMENTS FOR METALLURGICAL EQUIPMENT

Results Expected: INCREASED AWARENESS BU CANADIAN FIRMS OF TURKISH METALLURGY INDUSTRY AND ITS REQUIREMENTS.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 401 ANKARA

Market: 548 TURKEY

Sector: 010 MINE, METAL, MINERAL PROD & SRV

Subsector: 108 MINE DEVELOPEMENT SERVICES

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1.10M	\$ 0.90M	\$ 0.80M	\$ 0.60M
Canadian Exports \$	0.00M	\$ 0.00M	\$ 0.00M	\$ 0.00M
Canadian Share of Import Market	0.00%	0.00%	0.00%	0.00%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	015 %
ii) 128 GERMANY WEST	015 %
iii) 051 UNITED KINGDOM	015 %
iv) 112 FRANCE	015 %
v) 038 BELGIUM	015 %
vi) 099 POLAND	015 %

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

Current status of Canadian exports: No Export results to date

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) TECHNICAL SERVICES FOR COAL MINE DEVELOPMENT	\$ 0.00 M
ii) COPPER MINE DEVELOPMENT WORKS	\$ 0.00 M
iii) GOLD AND SILVER MINE DEVELOPMENT WORKS	\$ 0.00 M
iv) LEAD-ZINC MINE DEVELOPMENT PROJECT	\$ 0.00 M
v) GEOLOGICAL/AERIAL MAGNETIC MAPPING	\$ 0.00 M

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

i) Project Name: 26.9 MILLION TONNES/YEAR COAL PRODUCTION
PROJ. -13 PROJECTS IN 11 LOCATIONS

Approximate Value: \$ M

Financing Source: 023 EDC 012 DOM

For further info. please contact:

R. G. FARRELL TLX 607-42369 OTT (6130996-6439)

Export and Investment Promotion Planning System

MISSION: 401 ANKARA

COUNTRY: 548 TURKEY

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

ii) Project Name: AERIAL MAPPING PROJECTS-GEOLOGICAL
MAPPING OF MINERAL RESERVES

Approximate Value: \$ M
Financing Source: 023 EDC 012 DOM
For further info. please contact:
C. OXGUC TLX 607-42369 OTT(6130996-6439

iii) Project Name: TRONA MINE DEVELOPMENT PROJECT-
EQUIVALENT TO 750.00 T/Y SODA

Approximate Value: \$ M
Financing Source: 023 EDC 012 DOM
For further info. please contact:
OTT(613)996-6439 R. G. FARRELL TLX 607-42369

iv) Project Name: CAYELI COPPER MINE DEVELOPMENT PROJECT
(171,000 TONNE/YEAR)

Approximate Value: \$ M
Financing Source: 023 EDC 012 DOM
For further info. please contact:
OTT(613)996-6439 R. G. FARRELL TLX 607-42369

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

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

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

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

- aggressive marketing on the part of Canadian Exporters
- participation in trade missions
- strong sectoral capability in Canada

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

Export and Investment Promotion Planning System

MISSION: 401 ANKARA

COUNTRY: 548 TURKEY

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

Activity: MEETING WITH STATE MINING AFFAIRS DEPARTMENT OFFICIALS TO IDENTIFY THE GOLD-LEAD-ZINC RESERVES FOR WHICH MINERAL PROSPECTING RIGHTS/PERMISSION ARE NOT YET ISSUED.

Results Expected: INCREASED INTEREST FROM CANADIAN MINING FIRMS IN TURKISH MINE DEVELOPMENT PROJECTS.

Activity: TO OBTAIN MINERAL RESERVE MAPS FROM STATE MINERAL RESEARCH INSTITUTE FOR SUBMISSION TO CANADIAN FIRMS INTERESTED IN MINING ACTIVITY IN TURKEY.

Results Expected: INCREASED AVAILABILITY OF INFORMATION ON TURKISH MINING OPPORTUNITIES WILL IMPROVE MARKETING PROSPECTS.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 401 ANKARA

Market: 548 TURKEY

Sector: 011 OIL & GAS EQUIPMENT, SERVICES

Subsector: 116 MACHINERY AND EQUIPMENT

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	350.00M	\$ 205.00M	\$ 184.00M	\$ 156.00M
Canadian Exports \$	50.00M	\$ 2.00M	\$ 0.50M	\$ 0.20M
Canadian Share of Import Market	14.00%	1.00%	0.20%	0.10%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	020 %
ii) 112 FRANCE	002 %
iii) 237 ITALY	040 %
iv) 354 NETHERLANDS	001 %
v) 051 UNITED KINGDOM	005 %
vi) 265 JAPAN	015 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) LNG STORAGE AND TRANSPORT SYSTEMS	\$ 105.00 M
ii) GAS PIPELINE EQUIPMENT	\$ 0.00 M
iii) CITY GAS DISTRIBUTION SYSTEM	\$ 0.00 M
iv) OILFIELD EQUIPMENT	\$ 55.00 M

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

i) Project Name: STORAGE FACILITY FOR LNG TO BE IMPORTED
FROM ALGERIA

Approximate Value: \$ 105 M

Financing Source: 028 TO/DETER

For further info. please contact:

R. G. FARRELL TLX 607-42369 OTT(6130996-6439)

Export and Investment Promotion Planning System

MISSION: 401 ANKARA

COUNTRY: 548 TURKEY

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

ii) Project Name: CITY GAS DISTRIBUTION FOR ANKARA
AND ISTAMBUL

Approximate Value: \$ M
Financing Source: 028 TO/DETER
For further info. please contact:
A. KOSETORUNU TLX 607-42369 OTT(6130996-6439

iii) Project Name: TURKEY-IRAN NATURAL GAS PIPELINE

Approximate Value: \$ M
Financing Source: 028 TO/DETER
For further info. please contact:
EXTAFF OTT (613)996-6439

iv) Project Name: OIL EXPLORATION PROJECTS

Approximate Value: \$ M
Financing Source: 028 TO/DETER
For further info. please contact:
EXTAFF OTT (613)996-6439

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

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

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

- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- other factor(s) described by the Trade Office as follows:
LACK OF ADEQUATE UNDERSTANDING OF MARKET REQUIREMENTS AND
INADEQUATE LOCAL REPRESENTATION FOR AGGRESSIVE MARKETING.

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

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

Export and Investment Promotion Planning System

MISSION: 401 ANKARA

COUNTRY: 548 TURKEY

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

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

Activity: ENCOURAGEMENT OF MORE EFFECTIVE AND FREQUENT CALLS ON POTENTIAL CLIENTS BY CANADIAN EQUIPMENT EXPORTERS.

Results Expected: BETTER PROMOTION OF CANADIAN CAPABILITY IN OIL AND GAS SECTOR.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 401 ANKARA

Market: 548 TURKEY

Sector: 011 OIL & GAS EQUIPMENT, SERVICES

Subsector: 119 SERVICES INCLUDING CONSULTING

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	4.00M	\$ 3.50M	\$ 2.50M	\$ 2.00M
Canadian Exports \$	2.50M	\$ 2.50M	\$ 0.00M	\$ 0.00M
Canadian Share of Import Market	63.00%	71.00%	0.00%	0.00%

Major Competing Countries

Market Share

i) 237 ITALY	060 %
ii) 051 UNITED KINGDOM	005 %
iii) 112 FRANCE	020 %
iv) 128 GERMANY WEST	010 %
v) 093 DENMARK	000 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are
good market prospects

Current Total Imports
In Canadian \$

i) PIPELINE CONSULTANCY AND SUPERVISION	\$ 1.50 M
ii) CONSULTANCY AND SUPERVISION FOR LNG PROJECT	\$ 2.00 M

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

i) Project Name: ALGERIAN LNG SCHEME
(CONSULTANCY AND SUPERVISION)

Approximate Value: \$ 1.5 M

Financing Source: 012 DDM

For further info. please contact:

R. G. FARRELL TLX 607-42369 OTT(613)996-6439

ii) Project Name: TURKEY-IRAN NATURAL GAS PIPELINE PROJECT
(CONSULTANCY AND SUPERVISION)

Approximate Value: \$ 2 M

Financing Source: 028 TO/DETER

For further info. please contact:

A. KOSETORUNU TLX 607-42369 OTT(613)996-6439

Export and Investment Promotion Planning System

MISSION: 401 ANKARA

COUNTRY: 548 TURKEY

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

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

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

- a lack of interest in the market on the part of Canadian exporters
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- other factor(s) described by the Trade Office as follows:
BRITISH GAS IS DOING THE ANKARA GAS DISTRIBUTION FEASIBILITY STUDY FREE OF CHARGE.

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

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

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

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

Activity: ACTIVE AND CONTINUED PURSUIT OF UPCOMING TENDER OPPORTUNITIES RELATED TO MAJOR PROJECTS IN THIS SUB-SECTOR.

Results Expected: INCREASED AWARENESS OF COMPETITION & UNDERSTANDING CLIENTS' REQUIREMENTS ESSENTIAL FOR BIDDING.

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional Projects approved and planned for the coming fiscal year.		
Mission: 401 ANKARA		
Sector: 001 AGRI & FOOD PRODUCTS & SERVICE		
024 MISSION INCOMING LIVESTOCK DEVELOPMENT MISSION		0687
Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV		
010 FAIRS TURKEY '87	IZMIR	0887
024 MISSION INCOMING MINISTRY OF DEFENCE (PENDING FUNDING)		0987
Sector: 006 ELECTRONICS EQUIP. & SERV		
020 MISSION OUTGOING EDUCATIONAL EQU. & SERV. MISSION	ANKARA/ISTAMBUL/TEMI	0787
Sector: 007 POWER & ENERGY EQUIP. & SERV.		
020 MISSION OUTGOING ENERGY MISSION	ANKARA/ISTAN. /LAMAS	0587
Sector: 008 TRANSPORT SYS, EQUIP, COMP, SERV.		
024 MISSION INCOMING RAILWAYS ADMINISTRATION (TCDD)	SEVERAL CITIES	0487
Sector: 016 INDUSTRIAL MACHIN, PLANTS, SERV.		
020 MISSION OUTGOING ENERGY SECTOR MISSION TO TURKEY	ANKARA	0587
024 MISSION INCOMING BUYERS TO INTERCAN (ALBERTA)	ALBERTA	0687
Sector: 999 MULTIPLE SECTORS		
010 FAIRS IZMIR FAIR	IZMIR	0887
020 MISSION OUTGOING SECURITY EQUIPT. MISSION & SOLD SHOW ALBERTA MISSION (ECONOMIC DEV. & TRADE)	ANKARA ANKARA/ISTAN. /IZMIR	1187 0487

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 401 ANKARA		
Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV		
010 FAIRS		

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 401 ANKARA		
Sector: 014 EDUCATION, MEDICAL, HEALTH PROD		
024 MISSION INCOMING MINISTRY OF EDUCATION	TORONTO	0488
Sector: 016 INDUSTRIAL MACHIN, PLANTS, SERV.		
020 MISSION OUTGOING LIGHTING EQUIPMENT MISSION TO TURKEY		0488
Sector: 999 MULTIPLE SECTORS		
010 FAIRS IZMIR FAIR	IZMIR	0888

Export and Investment Promotion Planning System

87/88 Trade and Economic Overview

Mission: 402 ATHENS

Country: 159 GREECE

OVERVIEW: EVERYONE INCLUDING THE GOVERNOR OF THE BANK OF GREECE, THE FED'N OF GREEK IND. & THE EEC AGREE THAT OCT. '85 AUSTERITY MEASURES ARE HAVING SOME BENEFICIAL EFFECTS ON THE ECONOMY BUT AT A SLOWER RATE THAN ANTICIPATED BY GOVT. ALTHOUGH INFLATION AND BALANCE OF PAYMENTS TARGETS WILL PROBABLY BE APPROACHED THEY MAY NOT BE MET. INFLATION MAY BE AROUND THE 16% MARK ONLY BECAUSE OF THE RECENTLY ANNOUNCED PRICE FREEZE FOR THE INTRODUCTION OF THE VAT (VALUE ADDED TAX) JAN. 1, '87. OTHERWISE IT MIGHT HAVE APPROACHED 18-20% SOME IMPROVEMENTS REPORTED WERE; VALUE OF IMPORTS INCREASING AT A SLOWER RATE; PUBLIC SECTOR DEFICIT DROPPING BUT AS A RESULT OF INCREASED TAX REVENUES; 4% INCREASE IN INDEX OF PRODUCTION IN FIRST SIX MONTHS OF 1986 DUE TO MAINTENANCE OF DEMAND AND INCREASING EXPORTS. BECAUSE OF THESE IMPROVEMENTS THE GOVT REITERATED JUST BEFORE THE LOCAL ELECTIONS OF OCT. 12, '86 ITS INTENTION TO FIRMLY PURSUE THE AUSTERITY POLICY INTRODUCED IN OCT. '85. HOWEVER, THE GROSS NAT'L PROD. (G.N.P.) IS NOT EXPECTED TO INCREASE & THE TWO MAIN ISSUES FACING THE GREEK ECONOMY ARE: THE FALL IN THE REAL VALUE OF INVESTMENT, & THE DEFICIT IN BALANCE OF PAYMENTS. THE INTRODUCTION OF THE VAT JAN. 1ST '87 WILL PROBABLY HAVE A NOTICEABLE IMPACT ON INFLATION FOR 1987 & MAY ALSO PUSH IMMEDIATE DEMAND UP FOR LUXURY IMPORTED PRODS. IN SUMMARY, REAL WAGES ARE BEING FORCED DOWN, EXPORT VOLUME IS UP, THE CURRENT ACCOUNT DEFICIT WILL BE SUBSTANTIALLY REDUCED (ABOUT 1B DRACHMAS) FROM '85, DUE MAINLY TO LOWER OIL PRICES. FINALLY PRIVATE INVESTMENT REMAINS AT A LOW LEVEL. OUTLOOK: RECENT ECONOMIC INDICATIONS SUGGEST THAT 1987 WILL BE ONE OF INCREASED PROD'N DUE TO MORE COMPETITIVE EXPORTS INFLUENCED BY LOWER WAGE COSTS & DEVALUATION OF THE DRACHMA. THE GOVT GAVE RECENT INDICATION (LIFTING PRICE CONTROLS & ENCOURAGING PRIVATE INVESTMENT) OF FOLLOWING ALONG THE POLICY LINE PROPOSED BY THE GOVERNOR OF THE BANK OF GREECE URGING A BROADENING OF THE TAX BASE & LESS INTERVENTION IN THE MKT PLACE & BANKING. SUCH POLICY WOULD BE CONDUCTIVE TO A MORE CONFIDENT BUSINESS CLIMATE. HOWEVER, INVESTORS MAY NOT BE AT THE "RENDEZ-VOUS" BECAUSE OF PAST BAD EXPERIENCES. PROSPECTS FOR '87 ARE THAT CONSUMER DEMAND IS LIKELY TO CONTINUE TO FALL. INFLATION WILL CONTINUE TO FALL BUT WILL REMAIN RELATIVELY HIGH (14%), THE CURRENT ACCOUNT DEFICIT WILL PROBABLY BE ABOVE \$1.6B (US) & GNP GROWTH BETWEEN 0 & 1%. OPPORT.: MAJOR DIFFICULTIES FOR CDN EXPRTS ARE STILL THE STRONG EEC COMPETITION, FINANCING, REQUESTS FOR COUNTERTRADE & OFFSETS & OTHER NTB'S SUCH AS LANGUAGE, TENDERS IN LOCAL CURRENCY & BUREAUCRACY. THE VOLUME OF TRADE WILL PROBABLY INCREASE SLIGHTLY DUE TO RECENT GOVT PROCUREMENT CONTRACTS (CL-215) & NEW SPOT OPPORTUNITIES IN THE DEFENCE SECTOR.

Export and Investment Promotion Planning System

REPT: SYN-GEO 87/88 A. Post export program priorities

Region: WESTERN EUROPE

Mission: 402 ATHENS

Market: 159 GREECE

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

1. 004 DEFENCE PROGRAMS, PRODUCTS, SERV

REASONS: GREECE IS SPENDING APPROX. 7% OF ITS G.N.P. ON DEFENCE (ABOUT \$3 BILLION).

2. 008 TRANSPORT SYS, EQUIP, COMP, SERV.

REASONS: OLYMPIC HAS TENDERED FOR RENEWAL OF A/C FLEET BY PURCHASING 10-15 NEW 50 SEATER A/C, POST WILL REPORT DVLPT IN METRO MELLAS REF: SYSTEM CHOICE/LINE CONSTRUCTION EQUIPMENT PUNCH (\$250M).

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

REASONS: HELLENIC TELECOMM. ORGANIZATION PROGRAM INCLUDES THE CREATION OF DATA PROCESSING & DISTRIBUTION SYSTEM, AS WELL AS THE DEVELOPMENT OF ITS TELECOMMUNICATION SYSTEM.

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

1. 013 CONSUMER PRODUCTS
2. 002 FISHERIES, SEA PRODUCTS & SERV.
3. 001 AGRI & FOOD PRODUCTS & SERVICE
4. 008 TRANSPORT SYS, EQUIP, COMP, SERV.
5. 009 FOREST PRODUCTS, EQUIP, SERVICES

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 402 ATHENS

Market: 159 GREECE

Sector: 001 AGRI & FOOD PRODUCTS & SERVICE

Subsector: 013 SEEDS & SPECIAL CROPS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	12.50M	\$ 13.00M	\$ 12.50M	\$ 12.90M
Canadian Exports \$	3.30M	\$ 3.00M	\$ 2.30M	\$ 0.74M
Canadian Share of Import Market	26.00%	23.00%	18.00%	6.00%

Major Competing Countries

Market Share

i) 354 NETHERLANDS	030 %
ii) 128 GERMANY WEST	002 %
iii) 112 FRANCE	013 %
iv) 577 UNITED STATES OF AMERICA	012 %

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

Current status of Canadian exports: Mature with little growth

Products/services for which there are
good market prospects

Current Total Imports

	In Canadian \$
i) SEED POTATOES	\$ 5.50 M
ii) LENTILS	\$ 6.20 M
iii) BEANS	\$ 0.50 M

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

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

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

- the unsuitability of Canadian products for this market
- non-tariff protectionist measures which are difficult to overcome
- other factor(s) described by the Trade Office as follows:

EC DEROGATION PROBLEM

Export and Investment Promotion Planning System

MISSION: 402 ATHENS

COUNTRY: 159 GREECE

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

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

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

Activity: AGRICAN TO PROVIDE PROOF OF PHYTOSANITARY CONTROL ACCEPTABLE TO EC STANDARDS ALTHOUGH POLITICAL OVERTONES ARE OBVIOUS.

Results Expected: DECISION BY EEC.

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

Activity: LOBBY GREEK GVT TO SECURE THEIR SUPPORT FOR EEC DEROGATION ALLOWING SALES OF CDN SEEDS POTATOES.

Results Expected: IF DEROGATION GRANTED ANNUAL SALES OF SEED POTATOES OF \$0.5 - \$1 MILLION POSSIBLE.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 402 ATHENS

Market: 159 GREECE

Sector: 002 FISHERIES, SEA PRODUCTS & SERV.

Subsector: 022 PROCESSED FISH & SHELLFISH

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	83.00M	\$ 82.00M	\$ 80.00M	\$ 77.00M
Canadian Exports \$	3.00M	\$ 2.50M	\$ 2.00M	\$ 2.30M
Canadian Share of Import Market	3.60%	3.00%	2.50%	3.00%

Major Competing Countries

Market Share

i) 237 ITALY	008 %
ii) 577 UNITED STATES OF AMERICA	005 %
iii) 001 ARGENTINA	003 %
iv) 354 NETHERLANDS	025 %
v) 405 ICELAND	024 %
vi) 093 DENMARK	011 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) SALTED COD	\$ 15.80 M
ii) SMOKED HERRING	\$ 3.00 M
iii) FRESH, FROZEN FISH	\$ 20.50 M
iv) CRUSTACEANS/MOLLUSCS	\$ 25.00 M
v) CANNED, PRESERVED INCL CRUSTACEANS, MOLLUSCS	\$ 13.30 M

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

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

Export and Investment Promotion Planning System

MISSION: 402 ATHENS

COUNTRY: 159 GREECE

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

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- the unsuitability of Canadian products for this market
- the apparent limited sectoral capability in Canada compared to other competing export countries
- difficulties of adaptation of marketing techniques to the market by some Canadian companies

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

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

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

Activity: MEET NEW BUYERS AND ENCOURAGE VISITS TO CANADIAN SUPPLIERS.
ENCOURAGE WIDER CANADIAN PARTICIPATION, SERVICING MARKET.

Results Expected: - MORE VISITS TO CANADA
- NEW BUYERS
- INCREASED SALES

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 402 ATHENS

Market: 159 GREECE

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	3000.00M	\$ 2000.00M	\$ 2000.00M	\$ 0.00M
Canadian Exports \$	13.00M	\$ 13.00M	\$ 1.80M	\$ 1.00M
Canadian Share of Import Market	0.43%	0.43%	0.06%	0.03%

Major Competing Countries

Market Share

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

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

Current status of Canadian exports: Small but expanding

Products/services for which there are
good market prospects

Current Total Imports

	In Canadian \$
i) CL-215 AIRCRAFT	\$ 13.00 M
ii) NAVAL SHIPS ARMAMENTS	\$ 0.00 M
iii) AVIONICS	\$ 0.00 M
iv) NAVAL PATROL A/C	\$ 0.00 M

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

i) Project Name: ARMAMENTS-ELECTRONICS FOR HELLENIC
NAVY (ASW)(INCL AIRCRAFT)

Approximate Value: \$ 200 M

Financing Source: 028 TO/DETER

For further info. please contact:

MORISSETTE/GERAKIS/TELEX 215584 DOM GR

Export and Investment Promotion Planning System

MISSION: 402 ATHENS

COUNTRY: 159 GREECE

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

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

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

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

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

- support provided by the PEMD program
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

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

Activity: ASSIST CANADIAN INDUSTRY IN CONTACTING MILITARY AUTHORITIES IN GREECE AND IN PRESENTING THEIR CAPABILITY AND SYSTEMS. POST IS IN THE PROCESS OF FOLLOWING UP.

Results Expected: INCREASED SUPPLIERS VISITS INVITATIONS TO SUBMIT PROPOSALS/QUOTATIONS PURCHASE OF 3 MORE CL-215.

Activity: ASSIST SUITABLE CANADIAN FIRMS IN QUOTING AS A SUBCONTRACTOR FOR 2 FUEL PIPELINES OF THE HELLENIC AIRFORCE AND THE REPLACEMENT OF DIESEL PUMP ENGINES.

Results Expected: AWARD OF CONTRACT (S).

Activity: INITIATE CONTACTS BETWEEN THE PRINCIPAL GREEK DEFENCE INDUSTRIES AND CANADA FOR POSSIBLE COOPERATION IN THE FORM OF J. V. - POST IS FOLLOWING UP.

Results Expected: NEGOTIATIONS FOR LICENCING OR SUBCONTRACTING.

Export and Investment Promotion Planning System

MISSION: 402 ATHENS

COUNTRY: 159 GREECE

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

Activity: REVIEW MARKET POTENTIAL FOR OPPOTUNITIES BY MEETING REGULARLY WITH AGENTS/CLIENTS. PARTICIPATE IN HI-TECH CONFERENCE, OTTAWA.

Results Expected: RFPS, SALES
NEW CONTACTS
IMPROVED ACCESS

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 402 ATHENS

Market: 159 GREECE

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

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	250.00M	\$ 250.00M	\$ 207.00M	\$ 130.00M
Canadian Exports \$	4.00M	\$ 3.00M	\$ 1.10M	\$ 0.40M
Canadian Share of Import Market	0.01%	0.01%	0.00%	0.00%

Major Competing Countries

Market Share

i) 128 GERMANY WEST	008 %
ii) 112 FRANCE	002 %
iii) 051 UNITED KINGDOM	002 %
iv) 507 SWEDEN	001 %
v) 265 JAPAN	050 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects:

Current Total Imports

In Canadian \$

i) COMPUTERS & SOFTWARE	\$ 0.00 M
ii) TELECOMMUNICATIONS	\$ 0.00 M
iii) ELECTRONIC COMPONENTS	\$ 0.00 M

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

i) Project Name: SATELLITE TV
Approximate Value: \$ M
Financing Source: 028 TO/DETER
For further info. please contact:
GERAKIS - TELEX 215584 DOM GR

ii) Project Name: DATA PROCESSING AND DISTRIBUTION (GOVT)
Approximate Value: \$ M
Financing Source: 028 TO/DETER
For further info. please contact:
GERAKIS - TELEX 215584 DOM GR

Export and Investment Promotion Planning System

MISSION: 402 ATHENS

COUNTRY: 159 GREECE

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

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

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

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

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

- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

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

Activity: SEND TENDER ANNOUNCEMENTS OF THE HELLENIC TELECOMMUNICATIONS ORGANIZATION TO DRIE AND CDN INDUSTRY.

Results Expected: PARTICIPATION OF CANADIAN COMPANIES IN TENDERS FOR THE PURCHASE OF TELECOMMUNICATION EQUIPMENT.

Activity: HELLENIC TELECOMMUNICATIONS ORGANIZATION HAS ISSUED TENDER FOR THE ESTABLISHMENT OF A DATA PROCESSING SYSTEM. POST IS FOLLOWING UP.

Results Expected: ALERT CANADIAN COMPANIES WHEN TENDER IS ISSUED, AND OF RESULTS.

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

Activity: THE GOVERNMENT IS DISCUSSING THE POSSIBILITY OF PERMITTING THE INTRODUCTION OF SATELLITE TV. POST IS MONITORING FOR DECISION.

Results Expected: ALERT CANADIAN COMPANIES WHEN PROJECT IS ANNOUNCED AND TENDERED.

Export and Investment Promotion Planning System

MISSION: 402 ATHENS

COUNTRY: 159 GREECE

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

Activity: EVALUATE POTENTIAL FOR SOLO-SHOW PRESENTATION FOR SOFTWARE-TO INSTITUTIONS AND GOVERNMENT.

Results Expected: SEMINAR AND PRESENTATION BY 5-6 CANADIAN COMPANIES.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 402 ATHENS

Market: 159 GREECE

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

Subsector: 082 URBAN TRANSIT

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

Major Competing Countries

Market Share

i) 051 UNITED KINGDOM	000 %
ii) 112 FRANCE	000 %
iii) 128 GERMANY WEST	000 %
iv) 607 COMECON	000 %

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

Current status of Canadian exports: No Export results to date

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

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

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

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

- a lack of interest in the market on the part of Canadian exporters
- difficulties of adaptation of marketing techniques to the market by some Canadian companies

Export and Investment Promotion Planning System

MISSION: 402 ATHENS

COUNTRY: 159 GREECE

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

- No factors reported by mission

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

Activity: ASSIST LAVALIN/UTDC IN MAINTAINING CONTACTS. OBTAIN TENDER INFORMATION FROM AUTHORITIES.

- Results Expected:
- INCREASED VISITS
 - ANNOUNCEMENT SYST. DECISIONS
 - INFO. REPORTS

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 402 ATHENS

Market: 159 GREECE

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

Subsector: 085 AEROSPACE

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

Major Competing Countries

Market Share

- i) 051 UNITED KINGDOM
- ii) 112 FRANCE

000 %
000 %

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

100 \$M AND UP

Current status of Canadian exports:

No Export results to date

Products/services for which there are
good market prospects

Current Total Imports

In Canadian \$

- i) DHC'S DASH 8 (10-15 A/C)
- ii) CANADAIR'S CHALLENGER

\$ 0.00 M
\$ 0.00 M

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

- i) Project Name: OLYMPIC AIRWAYS FLEET
Approximate Value: \$ 175 M
Financing Source: 023 EDC 012 DOM
For further info. please contact:
MORISSETTE/GERAKIS TLX 215584 DOM GR

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

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

Export and Investment Promotion Planning System

MISSION: 402 ATHENS

COUNTRY: 159 GREECE

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

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies

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

- No factors reported by mission

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

Activity: ASSIST DEHAVILLAND RE THEIR PROPOSAL FOR THE RENEWAL OF THE A/C FLEET OF OLYMPIC AVIATION.

Results Expected: AWARD OF CONTRACT

Activity: PROVIDE ASSISTANCE TO CANADAIR RE THEIR PROPOSAL TO THE HELLENIC AIRFORCE FOR CHALLENGER JET.

Results Expected: FIRM PROPOSAL - AWARD OF CONTRACT.

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

Activity: ASSIST DHC/BOEING IN APPOINTING AGENT AS REQUIRED.

Results Expected: AGREEMENT WITH AGENT.

Activity: INTRODUCE NEW CL-215-T TO MINISTRIES (CLIENTS), E. G., AGRICULTURE, MERCHANT MARINE, HELLENIC NAVY, TRANSPORT - CL-215T.

Results Expected: RFP, VISITS FROM SUPPLIERS.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 402 ATHENS

Market: 159 GREECE

Sector: 009 FOREST PRODUCTS, EQUIP, SERVICES

Subsector: 092 WOOD AND WOOD PRODUCTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	164.00M	\$ 161.00M	\$ 160.80M	\$ 163.50M
Canadian Exports \$	1.20M	\$ 1.00M	\$ 0.60M	\$ 0.20M
Canadian Share of Import Market	0.80%	0.60%	0.40%	0.10%

Major Competing Countries

Market Share

i) 507 SWEDEN	013 %
ii) 504 FINLAND	013 %
iii) 577 UNITED STATES OF AMERICA	006 %
iv) 553 UNION OF SOVIET SOC REP	004 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) LUMBER	\$ 151.00 M
ii) PLYWOOD	\$ 4.60 M

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

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

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

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- the unsuitability of Canadian products for this market
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- other factor(s) described by the Trade Office as follows:
UNWILLINGNESS OF CANADIAN EXPORTERS TO CUT/OFFER METRIC MEASURES IN PAST.

Export and Investment Promotion Planning System

MISSION: 402 ATHENS

COUNTRY: 159 GREECE

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

- No factors reported by mission

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

Activity: TRANSLATION/PRINTING - TIMBER FRAME MANUAL IN GREEK

Results Expected: NEW REFERENCE MANUAL FOR GREEK PROFESSIONALS

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

Activity: INITIATE DISCUSSIONS WITH LEADING GREEK LUMBER/PLYWOOD IMPORTERS

Results Expected: NEW BUYERS IDENTIFICATION INCREASED OVERALL
CANADIAN LUMBER/PLYWOOD SALES.

Activity: DISTRIBUTION OF TIMBER MANUAL TO ENGINEERS/ARCHITECTS AND INSTITUTIONS

Results Expected: - GREATER AWARENESS
- MORE ENQUIRIES

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 402 ATHENS

Market: 159 GREECE

Sector: 013 CONSUMER PRODUCTS

Subsector: 131 APPAREL (CLOTH, FUR, SHOES) TEXT

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	370.00M	\$ 360.00M	\$ 350.00M	\$ 337.00M
Canadian Exports \$	12.00M	\$ 10.00M	\$ 9.40M	\$ 5.60M
Canadian Share of Import Market	3.30%	3.00%	2.70%	1.80%

Major Competing Countries

Market Share

i) 128 GERMANY WEST	048 %
ii) 577 UNITED STATES OF AMERICA	022 %
iii) 237 ITALY	012 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are
good market prospects

Current Total Imports

i) DRESSED FURS AND FUR CUTTINGS	\$ 340.00 M
ii) FUR GARMENTS	\$ 6.00 M
iii) RAW FUR SKINS	\$ 4.00 M

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

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

- difficulties of adaptation of marketing techniques to the market by
some Canadian companies

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

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

Export and Investment Promotion Planning System

MISSION: 402 ATHENS

COUNTRY: 159 GREECE

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

Activity: VISITS TO KASTORIA FOR DISCUSSIONS WITH BUYERS OF DRESSED FURS AND FUR CUTTINGS (SCRAPS)

Results Expected: - NEW CONTACTS
- INCREASED SALES

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 402 ATHENS		
Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV		
010 FAIRS DEFENDORY '88	PIRAEUS	1088
Sector: 009 FOREST PRODUCTS, EQUIP, SERVICES		
024 MISSION INCOMING TIMBER FRAME TECH. MISSION		0688
Sector: 016 INDUSTRIAL MACHIN, PLANTS, SERV.		
020 MISSION OUTGOING MINING MISSION TO GREECE AND TURKEY		1088
Sector: 017 SERVICE INDUSTRIES		
024 MISSION INCOMING ENVIRONMENT/WASTE TREATMENT		0888

Export and Investment Promotion Planning System

87/88 Trade and Economic Overview

Mission: 403 ROME

Country: 237 ITALY

TRADE AND ECONOMIC OVERVIEW: THE RECORD-BREAKING 3 YR LONGEVITY OF THE CRAXI LEADERSHIP HAS ALLOWED THE COALITIO GOVT TO PRESIDE OVER A PERIOD OF NOTE-WORTHY ECONOMIC PROGRESS. A '86 INFLATION RATE OF 5-6%, 3 CONSECUTIVE YRS OF 2-3% GROWTH, GREATER CORPORATE HEALTH SINCE THE '70, A CURRENT ACCOUNT SURPLUS & AN UNPRECEDED STOCK MKT BOOM LEAD FORECASTERS TO PREDICT ITALY WILL TAKE THE LEAD AMONG EEC NATIONS WITH A '87 GROWTH RATE PROJECTED OF 3.5%. GOVT MEMBERS PROUDLY POINT OUT THAT ITS NECK-AND-NECK CONVERGENCE WITH THE ECONOMIC PERFORMANCE OF FRANCE & THE W. GERMANY HAVE REMOVED THE PHRASE "ITALIAN RISK" FM FOREIGN OBSERVERS' PARLANCE. DOMESTIC DEMAND, FUELLED BY INCREASING DISPOSABLE INCOME & RISING CORPORATE PROFITS, HAS BEEN A KEY FACTOR IN THE '86 GROWTH RATE OF APPROX. 2.8% PARTICIPATION IN THE EUROPEAN ECONOMIC MAINSTREAM IS NOT WITHOUT ITS COSTS. EXPORT VOLUME THROUGH '87 IS EXPECTED TO CONTINUE FALLING, BY ABOUT 2.6%, WHILE IMPORTS RISE BY 7%; REAL WAGE INCREASES WILL RUN AHEAD OF INFLATION, REAL INTEREST RATES WILL STAY HIGH, & THE UNEMPLOYMENT RATE WILL SEE LITTLE IF ANY DECREASE FM ITS '86 AVGE OF 11.1% NOR CHANGE FM ITS PARTICULAR CONCENTRATION AMONG SOUTHERN ITALIAN YOUTH. THE ABRUPT DROP IN OIL MKTS BETWEEN 85-86 WAS LARGELY RESPONSIBLE FOR THE TRANSFORMATION OF ITALY'S 1.8B '85 DEFICIT, TO AN EQUIVALENT SURPLUS IN '86. GIVEN A PATTERN IN OIL PRICES, PRIVATE CONSUMPTION GROWTH IS EXPECTED TO CONTINUE & IND'L PROD'N REMAIN STRONG ENOUGH TO HOLD THE LINE AGAINST FURTHER INCREASES IN UNEMPLOYMENT. (MALTA)-DESPITE EFFORTS AT DIVERSIFICATION & RECENT BARTER AGREEMENTS WITH THE EAST BLOCK, THE EEC REMAINS MALTA'S PRINCIPAL TRADING PARTNER. THE COUNTRY IMPORTS \$700,000 OF CDN GOODS ANNUALLY (PRIMARY AGRI. PRODS, BEVERAGES, TOBACCO AND FABRICATED MATERIALS). EXPORT ORIENTED JOINT VENTURES IN MFTG ARE BEING ACTIVELY ENCOURAGED WITH EMPHASIS PLACE UPON MALTA'S PRODUCTION AND LOCATIONAL ADVANTAGES. PROMOTION OF THE COUNTRY'S EXPANDED PORT FACILITIES IS ALSO REGARDED AS CENTRAL TO THE MALTA'S SUCCESS IN GAINING STATUS AS A MAJOR MEDITERRANEAN TRANS-SHIPMENT POINT. (LIBYA) - IN LIGHT OF TRADE RESTRICTIONS WITH LIBYA, OUR ACTIVITIES WITH REGARD TO THIS COUNTRY ARE LIMITED TO THE PROVISION OF AVAILABLE MARKET INTELLIGENCE ON A RESPONSIVE BASIS ONLY.

Export and Investment Promotion Planning System

REPT: SYN-GEO 87/88 A. Post export program priorities

Region: WESTERN EUROPE

Mission: 403 ROME

Market: 237 ITALY

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

1. 004 DEFENCE PROGRAMS, PRODUCTS, SERV

REASONS: RECONVENING OF BILATERAL RDP COMMITTEE & RENEWAL OF DIALOGUE AT GOVT'L LEVEL. IND'L COOP MISSIONS TO & FROM CDA PLANNED.

2. 002 FISHERIES, SEA PRODUCTS & SERV.

REASONS: QUALITY FISH PRODS IMPORT OPPORTUNITIES FOR CDA. ITALY IS MAJOR IMPTR OF FISH PRODS, LARGELY FROM OUTSIDE EEC. TRADITIONAL MEDITERRANEAN SPECIES OVERFISHED.

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

REASONS: IN AEROSPACE GOOD POSS. SALE OF TWO ADD. WATERBOMBERS TO ITALY & OF 2 HYSTAR AIRSHIPS. FORMICA MISSION TO CDA & PREVIOUS IRI MISSION TO CDA CLEARLY DEMOSNTRATED NEED/PROSPECTS FOR BILATERAL COLLABORATION.

4. 005 COMM. & INFORM. EQP. & SERV

REASONS: GROWING MKT OPPORT. FOR TELECONS EQPT INCL SWITCHING ELECTRONIC FINANCIAL INSTRUMENTATIONS & SRVCS, ROBOTICS & ARTIFICIAL INTELLIGENCE, REMOTE SENSING EQPT, ETC. PROSPECTS FOR IND'L COOP & TECH INFLOWS TO CDA

5. 010 MINE, METAL, MINERAL PROD & SRV

REASONS: NEW MKT IS OPENING UP FOR COAL AS A RESULT OF ECON AND POLITICAL SITU. IN SOUTH AFRICA. NEED TO CONTINUE TO PROTECT OUR ACCESS FOR ASBESTOS IN ITALIAN MKT. RECENT INTEREST IN CDN GRANITE.

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

1. 010 MINE, METAL, MINERAL PROD & SRV
2. 009 FOREST PRODUCTS, EQUIP, SERVICES
3. 003 GRAINS AND OILSEEDS
4. 008 TRANSPORT SYS, EQUIP, COMP, SERV.
5. 002 FISHERIES, SEA PRODUCTS & SERV.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 403 ROME

Market: 237 ITALY

Sector: 002 FISHERIES, SEA PRODUCTS & SERV.

Subsector: 021 FISH & SHELLFISH & OTHER PROD

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1200.00M	\$ 1100.00M	\$ 985.00M	\$ 684.00M
Canadian Exports \$	17.00M	\$ 14.00M	\$ 12.00M	\$ 7.00M
Canadian Share of Import Market	1.40%	1.30%	1.20%	1.00%

Major Competing Countries

Market Share

i) 112 FRANCE	013 %
ii) 354 NETHERLANDS	012 %
iii) 499 SPAIN	010 %
iv) 093 DENMARK	009 %
v) 001 ARGENTINA	006 %
vi) 181 PANAMA	005 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) FROZEN SALMON	\$ 25.00 M
ii) LIVE LOBSTER	\$ 2.00 M
iii) CLAMS	\$ 0.50 M

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

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

Export and Investment Promotion Planning System

MISSION: 403 ROME

COUNTRY: 237 ITALY

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

- a lack of interest in the market on the part of Canadian exporters
- the apparent limited sectoral capability in Canada compared to other competing export countries
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters
- other factor(s) described by the Trade Office as follows:
LACK OF HEALTH AUTHORIZATION FOR EASTERN COASTAL WATERS (SHELLFISH); LACK OF HEALTH AUTHORIZATION FOR QUICK-FROZEN FOODS (RETAIL PACK PRODUCTS)

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

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

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

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

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

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

Activity: OBTAIN ITALIAN MINISTRY OF HEALTH AUTHORIZATION FOR EASTERN CDN COASTAL WATERS TO PERMIT IMPORT OF CLAMS.

Results Expected: OBTAIN AUTHORIZATION

Activity: OBTAIN DOCUMENTATION FM FANCO CANADA REQUIRED TO OBTAIN AUTHORIZATION OF ITALIAN MINISTRY OF HEALTH TO PERMIT IMPORT OF QUICK-FROZEN FOODS.

Results Expected: OBTAIN AUTHORIZATION

Export and Investment Promotion Planning System

MISSION: 403 ROME

COUNTRY: 237 ITALY

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

Activity: ATTEMPT TO OBTAIN AGENCIES FOR CANADIAN EXPORTERS OF LIVE LOBSTERS.

Results Expected: ONE AGENCY AGREEMENT.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 403 ROME

Market: 237 ITALY

Sector: 002 FISHERIES, SEA PRODUCTS & SERV.

Subsector: 022 PROCESSED FISH & SHELLFISH

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	400.00M	\$ 370.00M	\$ 344.00M	\$ 256.00M
Canadian Exports \$	12.00M	\$ 10.00M	\$ 8.00M	\$ 7.00M
Canadian Share of Import Market	3.00%	2.70%	2.30%	2.70%

Major Competing Countries

Market Share

i) 410 NORWAY	031 %
ii) 093 DENMARK	017 %
iii) 128 GERMANY WEST	008 %
iv) 499 SPAIN	008 %
v) 448 PORTUGAL	007 %
vi) 405 ICELAND	006 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are
good market prospects

Current Total Imports

	In Canadian \$
i) SALTED COD	\$ 70.00 M
ii) SMOKED SALMON	\$ 18.00 M
iii) CANNED SALMON	\$ 4.00 M
iv) CANNED CRAB	\$ 2.00 M

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

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

Export and Investment Promotion Planning System

MISSION: 403 ROME

COUNTRY: 237 ITALY

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

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

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

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

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

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

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

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

Activity: DEVELOP AGENCIES FOR CDN SALMON SMOKERS

Results Expected: 2 -3 NEW AGENCY AGREEMENTS

Activity: SPONSOR AND ORGANIZE RECEPTION FEATURING CANADIAN SALMON AND CRAB PRODUCTS. INVITEES ITLN IMPORTERS, DISTRIBUTORS AND END USERS.

Results Expected: INCREASED SALES OF THESE LINES TO ITALY.

Activity: PURCHASE SMALL PERSONAL COMPUTER AND ESTABLISH DATA BASE OF ITLN FISH IMPORTERS. REGULAR MAILINGS TO THESE CONTACTS.

Results Expected: PERMIT OFFICE TO ASSUME MORE ACTIVE TRADE PROMOTION AND SELECT LOCAL FIRMS WE WISH TO DEAL WITH.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 403 ROME

Market: 237 ITALY

Sector: 003 GRAINS AND OILSEEDS

Subsector: 031 CEREAL GRAINS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1700.00M	\$ 1700.00M	\$ 1650.00M	\$ 1690.00M
Canadian Exports \$	75.00M	\$ 75.00M	\$ 52.00M	\$ 101.00M
Canadian Share of Import Market	4.40%	4.40%	3.20%	6.00%

Major Competing Countries

Market Share

i) 112 FRANCE	053 %
ii) 159 GREECE	013 %
iii) 577 UNITED STATES OF AMERICA	013 %
iv) 075 CANADA	007 %
v) 001 ARGENTINA	006 %
vi) 051 UNITED KINGDOM	004 %

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

Current status of Canadian exports: Mature with little growth

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) DURUM WHEAT	\$ 340.00 M
ii) BREAD WHEAT	\$ 756.00 M

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

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

- high tariffs
- other factor(s) described by the Trade Office as follows:
EEC CAP, WITH HIGH LEVY PROTECTION, HAS ENCOURAGED SURPLUS GRAIN PRODUCTION IN ECC, TO THE EXTENT THAT CDN EXPORTS ARE LIMITED TO MINIMUM QUANTITIES OF HIGH-QUALITY BLENDING WHEATS.

Export and Investment Promotion Planning System

MISSION: 403 ROME

COUNTRY: 237 ITALY

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

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

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

Activity: MAINTAIN PROFILE, ASSISTANCE TO GRAIN COMMISSION AND CWB ON REGULAR AD HOC BASIS. ASSIST ON USER COMPLAINTS.

Results Expected: ASSIST IN MAINTAINING HIGH QUALITY WHEAT MARKET IN ITALY IN SPITE OF HIGH EEC LEVY SYSTEM.

Activity: PREPARE QUARTELY GRAINS REPORTS, ANNUAL GRAINS QUESTIONNAIRE AND AD HOC INTELLIGENCE REPORTS.

Results Expected: ASSIST IN MAINTAINING HIGH QUALITY WHEAT MARKET IN ITALY IN SPITE OF HIGH EEC LEVY SYSTEM.

Activity: MAINTAIN REGULAR CONTACT WITH MILLERS, PASTA MANUFACTURERS AND ASSOCIATION.

Results Expected: ASSIST IN MAINTAINING HIGH QUALITY WHEAT MARKET IN ITALY IN SPITE OF HIGH EEC LEVY SYSTEM.

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

Activity: ORGANIZE FOR CDN GRAIN COMMISSION WORKSHOP IN GRAIN QUALITIES AND INSPECTION IN ITALY AUDIENCE TO CONSIST OF ITLN MILL MANAGERS AND GOVT GRAIN INSPECTORS.

Results Expected: GREATER AWARENESS OF CDN QUALITY STANDARDS AND CONSEQUENT AWARENESS OF QUALITY OF OUR GRAIN EXPORTS.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 403 ROME

Market: 237 ITALY

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Subsector: 041 AEROSPACE & MARINE

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	500.00M	\$ 400.00M	\$ 350.00M	\$ 300.00M
Canadian Exports \$	30.00M	\$ 25.00M	\$ 28.00M	\$ 25.00M
Canadian Share of Import Market	6.00%	6.00%	7.10%	8.00%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	070 %
ii) 128 GERMANY WEST	010 %
iii) 616 OTHER COUNTRIES	014 %

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

Current status of Canadian exports: Well established and growing

Products/services for which there are
good market prospects

Current Total Imports

In Canadian \$

i) AIRCRAFT ENGINES AND PARTS	\$ 60.00 M
ii) SIMULATORS	\$ 20.00 M
iii) E. O. D.	\$ 20.00 M
iv) VDS	\$ 10.00 M
v) ELECTRONICS	\$ 100.00 M

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

i) Project Name: SIMULATORS FOR ITLN A129, AMX AND EH101
AIRCRAFT

Approximate Value: \$ 50 M

Financing Source: 012 DOM

For further info. please contact:

L. D. BURKE, EMBASSY, ROME, TLX: 43-610056

ii) Project Name: E. O. D. REQUIREMENTS OF ITLN POLICE AND
MILITARY AUTHORITIES

Approximate Value: \$ 20 M

Financing Source: 012 DOM

For further info. please contact:

L. D. BURKE, EMBASSY, ROME, TLX: 43-610056

Export and Investment Promotion Planning System

MISSION: 403 ROME

COUNTRY: 237 ITALY

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

iii) Project Name: VDS EQUIPMENT

Approximate Value: \$ 30 M

Financing Source: 012 DOM

For further info. please contact:

L. D. BURKE, EMBASSY, ROME, TLX: 43-610056

iv) Project Name: SPECIALIZED MILITARY EQUIP. RANGING FROM
GROUND HEATING EQUIP. TO AMMUNITION

Approximate Value: \$ 50 M

Financing Source:

For further info. please contact:

L. D. BURKE, EMBASSY, ROME, TLX: 43-610056

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

- there are import restrictions which can present significant problems
- exports of certain products or services to this country are subject to Canadian export controls
- the degree of import duty protection of local industry tends to be moderate
- approval of technical standards can present problems in the case of some imported products

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

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

ITLN GOVT POLICY UP TO NOW HAS BEEN TO REDUCE PURCHASE OF CDN DEFENCE ITEMS BECAUSE OF PERCEIVED IMBALANCE IN BILATERAL DEFENCE TRADE.

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

- No factors reported by mission

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

Activity: EFFORTS JUST COMPLETED ON RECONVENING OF CDN ITALY RDP COMMITTEE MEETINGS & OF DIALOGUE AT MINISTERIAL LEVEL IN DEFENCE SECTOR.

Results Expected: FIRST OF BILATERAL RDP COMMITTEE MEETING IN 3 - 4 YEARS WILL TAKE PLACE EARLY SPRING OF 1987.

Export and Investment Promotion Planning System

MISSION: 403 ROME

COUNTRY: 237 ITALY

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

Activity: FOLLOW UP ON RECENT INDUSTRIAL COOPERATION MISSION TO CDA FROM ITALY THAT INCLUDED SMALL DEFENCE SECTOR.

Results Expected: JOINT VENTURES WITH ITALY IN FIELDS OF ELECTRONICS, ARMAMENTS & AEROSPACE THAT WILL RESULT IN INCREASED CDN SALES.

Activity: DIALOGUE AND CLOSE LIAISON WITH ITLN DEFENCE MINISTRY AND ITLN PRIVATE SECTOR DEFENCE FIRMS.

Results Expected: INCREASED J. V. 'S AND REPRESENTATIONAL AGREEMENTS FOR CDN COMPANIES.

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

Activity: ATTEND D. P. B. HIGH TECH CONFERENCE IN OTTAWA.

Results Expected: INCREASED KNOWLEDGE OF NEW CDN FIRMS AND PRODUCTS IN DEFENCE SECTOR.

Activity: DIRECT FOLLOW UP WITH INTL FIRMS IN DEFENCE SECTOR THAT WERE ON THE FORMICA MISSION TO CANADA.

Results Expected: CONCLUSION OF COLLABORATION AGREEMENTS FOR SUCH PRODUCTS AS L. A. V. 'S, UPGRADE LEOP I TANK NIGHT COMBAT EQUIPMENT.

Activity: SCHEDULED REGULAR MEETINGS WITH SENIOR PLANNING OFFICIALS ITLN MIN DEFENCE TO DETERMINE, AS WE HAVE DONE IN PAST, IMMEDIATE & MED. TERM ITLN PROJECTS INCLUDING EUREKA PROJECTS WHERE THERE IS POSSIBILITY FOR CDN PARTICIPATION.

Results Expected: IDENTIFICATION OF NEW PROJ. COMING UP IN ITALY IN DEFENCE PROGRAMS & PRODUCTS THAT WILL BE OF INTEREST TO CDN FIRMS.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 403 ROME

Market: 237 ITALY

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

Subsector: 054 COMPUTERS, SOFTWARE & SYSTEMS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	8500.00M	\$ 6500.00M	\$ 5000.00M	\$ 3700.00M
Canadian Exports \$	10.50M	\$ 9.60M	\$ 12.70M	\$ 12.60M
Canadian Share of Import Market	0.10%	0.10%	0.20%	0.30%

Major Competing Countries

Market Share

i) 112 FRANCE	025 %
ii) 128 GERMANY WEST	019 %
iii) 051 UNITED KINGDOM	013 %
iv) 577 UNITED STATES OF AMERICA	010 %
v) 354 NETHERLANDS	007 %

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

Current status of Canadian exports: Market share declining

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) ELECTRONIC FINANCIAL EQUIPMENT	\$ 0.00 M
ii) SOFTWARE	\$ 1.50 M
iii) TERMINALS, PERIPHERALS MODEMS	\$ 7.50 M

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

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

Export and Investment Promotion Planning System

MISSION: 403 ROME

COUNTRY: 237 ITALY

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

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

LACK OF AWARENESS OF CDN CAPABILITIES (NORTHERN TELECOM'S POSSIBLE ENTRY INTO THE ITLN MARKET WOULD HELP TO RECTIFY THIS). CDN FIRMS MUST ESTABLISH "ITLN IDENTITY" EITHER THROUGH PHYSICAL PRESENCE OR J. V. 'S.

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

- aggressive marketing on the part of Canadian Exporters
- participation in trade fairs
- participation in trade missions

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

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

Activity: IF REQUIRED SUPPORT NORTHERN TELECOM'S EFFORTS TO ENTER ITALIAN PABX MKT. IDENTIFY POSSIBLE J. V. PARTNER AND TO THIS END FOLLOW UP ON IRI FORMICA MISSION VISIT TO NORTHERN OCT/86. ALSO, ASSIST NORTHERN IN POSSIBLE PART IN SELECTED EUREKA PROJ.

Results Expected: NORTHERN TELECOM J. V. WITH MAJOR ITAL. TELECOM SUPPLIER FOR BOTH ITAL. DOMESTIC SWITCHING MKT AND OTHER THIRD MKTS.

Activity: ASSIST GEAC COMPUTERS AND OTHER CDN HARWARE/SOFTWARE COYS IN PENETRATING GROWING ITLN MARKET FOR BANKING/FINANCIAL COMPUTER SERVICES.

Results Expected: INCREASED EXPORT SALES/IND. COOPERATION AGREEMENTS FOR CDN COMPANIES IN THIS FIELD.

Activity: DISTRIBUTION AND UPDATE OF ENGLISH TRANSLATION OF ITLN PTT NATIONAL TELECOM PLAN (1985-1994) TO CDN COYS.

Results Expected: INFORM AND STIMULATE INTEREST OF CDN COYS IN FAST GROWING ITLN TELECOM MKT.

Export and Investment Promotion Planning System

MISSION: 403 ROME

COUNTRY: 237 ITALY

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

Activity: PURSUE LICENSING/J.V. AGMTS IN FIBRE OPTICS, DIGITAL IMAGERY AND ADVANCED MATERIALS BETWEEN CDN AND ITLN FIRMS ALSO FOR THIRD MKTS.

Results Expected: INCREASED J.V. AND REPRESENTATIONAL AGMTS. FOR CDN COYS IN THESE HIGH VALUE EMERGING SECTORS

Activity: ACTIVE LIAISON WITH MIN. OF SANDT, ENEA (NATL NUCLEAR ENERGY AGENCY) AND MAJOR ITLN HI-TECH FIRMS IN SUPPORT OF AND FOLLOW UP TO CDN EUREKA MISSION DEC. 86

Results Expected: EUREKA SUBCONTRACTS AND TECHNOLOGY INFLOWS TO CDA

Activity: PURSUE SALE OF HIGHWAY PRODS OF PARTS ONTARIO "ARAN" AUTO. ROAD ANALYSER SYSTEM TO AZIENDA NAZIONALE AUTONOMA DELLE STRADE (ESTIMATED WORTH \$400,000).

Results Expected: EQUIPMENT SALE.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 403 ROME

Market: 237 ITALY

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

Subsector: 057 ROBOTICS & ARTIFICIAL INTELL.

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	562.00M	\$ 490.00M	\$ 410.00M	\$ 383.00M
Canadian Exports \$	0.00M NA	\$ 0.00M NA	\$ 0.00M NA	\$ 0.00M NA
Canadian Share of Import Market	0.00% NA	0.00% NA	0.00% NA	0.00% NA

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	000 %
ii) 128 GERMANY WEST	000 %
iii) 265 JAPAN	000 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) ARTIFICIAL INTELLIGENCE	\$ 0.00 M
ii) MOVABLE ROBOTICS	\$ 0.00 M
iii) DIGITAL IMAGING	\$ 0.00 M
iv) CAD/CAM/CAE TECHNOLOGY	\$ 0.00 M

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

i) Project Name: EUREKA/"PARADI" INTEGRATED PRODUCTION SYSTEMS

Approximate Value: \$ 40 M

Financing Source: 012 DDM

For further info. please contact:

J. PICARD, EMBASSY, ROME, TLX: 43-610056

ii) Project Name: EUREKA/ADVANCED MOVABLE ROBOTS FOR CIVIL PROTECTION

Approximate Value: \$ 140 M

Financing Source: 012 DDM

For further info. please contact:

J. PICARD, EMBASSY, ROME, TLX: 43-610056

Export and Investment Promotion Planning System

MISSION: 403 ROME

COUNTRY: 237 ITALY

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

iii) Project Name: EUREKA/"EUROCIM" INTEGRATED ELECTRONIC COMPONENTS PRODUCTION

Approximate Value: \$ 40 M

Financing Source: 012 DOM

For further info. please contact:

J. PICARD, EMBASSY, ROME, TLX: 43-610056

iv) Project Name: EUREKA/"MITHRA" MOBILE ROBOTS FOR TELE-SURVEILLANCE

Approximate Value: \$ 47 M

Financing Source: 012 DOM

For further info. please contact:

J. PICARD, EMBASSY, ROME, TLX: 43-610056

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

- exports of certain products or services to this country are subject to Canadian export controls
- the degree of import duty protection of local industry tends to be moderate

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

- a lack of interest in the market on the part of Canadian exporters
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- non-tariff protectionist measures which are difficult to overcome
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters
- other factor(s) described by the Trade Office as follows:
CDN COYS MUST COME TO ITALY AND VISIT/PARTICIPATE IN SMALL AND BIAS TRADE FAIRS. ALSO J.V. TIE WITH DOMESTIC FIRM HIGHLY DESIRABLE.

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

- aggressive marketing on the part of Canadian Exporters
- participation in trade fairs

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

Export and Investment Promotion Planning System

MISSION: 403 ROME

COUNTRY: 237 ITALY

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

Activity: ACTIVE LIAISON WITH ITLN COYS, ENEA AND MIN. OF SANDT IN SUPPORT OF MACDONALD-DETTWILER, NORTHERN TELECOM AND OTHER CDN COMPANIES INTERESTED IN EUREKA ROBOTICS/AMT PROJECTS PARTICIPATION.

Results Expected: POSSIBLE EUREKA SUBCONTRACTS, TECH. INFLOW AND LIKELY LEADS TO OTHER ITLN AND EUROPEAN HI-TECH PROJECTS.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 403 ROME

Market: 237 ITALY

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

Subsector: 082 URBAN TRANSIT

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import)	\$ 12000.00M	\$11000.00M	\$10000.00M	\$ 9000.00M
Canadian Exports	\$ 30.00M	\$ 5.00M	\$ 15.00M	\$ 5.00M
Canadian Share of Import Market	0.25%	0.05%	0.15%	0.06%

Major Competing Countries

Market Share

i) 128 GERMANY WEST	025 %
ii) 112 FRANCE	020 %
iii) 577 UNITED STATES OF AMERICA	020 %
iv) 051 UNITED KINGDOM	010 %
v) 616 OTHER COUNTRIES	025 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) CANADIAN WATERBOMBERS	\$ 15.00 M
ii) Hystar Airships	\$ 2.00 M
iii) COMPONENTS & TECHNOLOGY URBAN & RAIL SYSTEMS	\$ 1000.00 M

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

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

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

- the apparent limited sectoral capability in Canada compared to other competing export countries
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters
- other factor(s) described by the Trade Office as follows:

CDN FIRMS STARTING ONLY NOW TO ADJUST FULLY TO NEED FOR JOINT VENTURES AND INDUSTRIAL COLLABORATION WITH ITALIAN FIRMS.

Export and Investment Promotion Planning System

MISSION: 403 ROME

COUNTRY: 237 ITALY

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

- aggressive marketing on the part of Canadian Exporters
- use of Canadian Government export promotion activities
- Canada's position as one of the few major sources of international supply

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

Activity: FOLLOW UP TO FORMICA MISSION TO CANADA THAT INCLUDED SEVERAL ITALIAN FIRMS IN TRANSPORTATION SECTOR.

Results Expected: JOINT VENTURES ESPECIALLY FOR PROJECTS IN THIRD MARKETS. SALE OF COMPONENTS AND TECHNOLOGY.

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

Activity: SPECIAL PROMOTION WITH ITLN DEPT. OF AGRICULTURE IN CONJUNCTION WITH LOCAL AGENT OF CANADIAN OF CDN FIRM'S WATERBOMBERS.

Results Expected: SALE OF TWO ADDITIONAL WATERBOMBERS TO ITALY IN 1987.

Activity: PROVISION OF PRICING & TECHNICAL INFORMATION TO ITLN CONSTRUCTION AND ENGINEERING COMPANIES, ESPECIALLY THOSE ENGAGED IN OVERSEAS WORK

Results Expected: SALE OF TWO HYSTAR AIR SHIPS FOR AERIAL SURVEY & CONSTRUCTION WORK ON OVERSEAS PROJECTS BEING HANDLED BY ITLN FIRMS.

Activity: ONE MAJOR CDN TRANSPORTATION FIRM IS A KEY TO FURTHER PROMOTION IN THIS SECTOR. THEY ALREADY HAVE SOME CORPORATE LINKS WITH ITLN FIRMS. ENCOURAGE & ORGANIZE VISIT TO ITALY OF SENIOR EXECUTIVES FOR FURTHER DISCUSSIONS HERE.

Results Expected: JOINT VENTURES FOR PROJECTS IN ITALY AND THIRD MARKETS. SALE OF COMPONENTS & KNOWHOW FROM CANADA.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 403 ROME

Market: 237 ITALY

Sector: 010 MINE, METAL, MINERAL PROD & SRV

Subsector: 102 MINERALS AND MINERAL PRODUCTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	2000.00M	\$ 1800.00M	\$ 1500.00M	\$ 1200.00M
Canadian Exports \$	50.00M	\$ 30.00M	\$ 27.00M	\$ 24.00M
Canadian Share of Import Market	2.50%	1.60%	1.80%	2.00%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	050 %
ii) 288 SOUTH AFRICA	020 %
iii) 099 POLAND	015 %
iv) 616 OTHER COUNTRIES	015 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are
good market prospects

Current Total Imports In Canadian \$
\$ 1700.00 M
\$ 60.00 M
\$ 5.00 M

- i) COAL
- ii) ASBESTOS
- iii) GRANITE

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

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

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

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

Export and Investment Promotion Planning System

MISSION: 403 ROME

COUNTRY: 237 ITALY

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

- No factors reported by mission

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

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

Activity: MAJOR CUSTOMER FOR CDN COAL IS LOCATED IN ROME. RENEW CONTACTS WITH PURCHASING DEPT. ENEL PROVIDE UP TO DATE OFFERS ON CDN COAL IN TERMS OF PRICES AND SPECIFICATIONS.

Results Expected: WITH POLITICAL AND ECONOMIC DIFFICULTIES IN SOUTH AFRICA PARTIALLY REPLACE THIS COUNTRY AS SUPPLIER. CDN SALES \$20 M IN 1987.

Activity: RENEW OUR REQUEST TO CDN COAL ASSOCIATION OF CDA TO MOUNT SALES MISSION TO ITALY, INCLUDING NEARBY POTENTIAL MARKETS TO REDUCE OVERALL COST OF SUCH AN UNDERTAKING.

Results Expected: ESTABLISHMENT OF CANADA AS A NEW AND LONG TERM SUPPLIER OF COAL TO ITALY.

Activity: CONTINUE TO ASSIST CDN ASSOCIATION AND ITLN ASSN OF ASBESTOS PRODUCTS MANUFACTURERS WITH PROBLEMS OF ACCESS AND TO ENCOURAGE SUPPORT OF ITALY IN THE INTERNATIONAL FORUM IN THE CONTINUED INTERNATIONAL TRADE IN THIS COMMODITY.

Results Expected: MAINTAIN TRADITIONAL SALES OF CDN ASBESTOS FIBRES TO ITALY.

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional Projects approved and planned for the coming fiscal year.		
Mission: 403 ROME		
Sector: 005 COMM. & INFORM. EQP. & SERV		
010 FAIRS SOFTWARE CATALOGUE SHOW	ROME	0288
020 MISSION OUTGOING SECURITY PRODUCTS MISSION TO CANADA	MONTREAL/TORONTO	1187
Sector: 008 TRANSPORT SYS, EQUIP, COMP, SERV.		
024 MISSION INCOMING EFIM URBAN TRANS. EQPT. MISSION TO CANADA	MONTREAL, TORONTO	0487
IRI RAIL TRANS. EQPT. MISSION TO CANADA	MONTREAL, TORONTO	0687
Sector: 010 MINE, METAL, MINERAL PROD & SRV		
020 MISSION OUTGOING CDN COAL MISSION TO ITALY	ROME	0687
Sector: 999 MULTIPLE SECTORS		
010 FAIRS FIERA DEL LEVANTE	BARI	0987
024 MISSION INCOMING MINISTERIAL MISSION	ROME	1087

Export and Investment Promotion Planning System

87/88 Trade and Economic Overview

Mission: 404 MILAN

Country: 237 ITALY

ITALIAN ECONOMIC PERFORMANCE HAS IMPROVED NOTABLY IN RECENT YEARS CURRENTLY, FALLING OIL PRICES COUPLED WITH DECLINING DOLLAR RATES AND LOWER INTEREST RATES IN MAJOR INDUSTRIAL COUNTRIES ARE IMPORTANT FACTORS PROPELLING THE ITALIAN ECONOMY TOWARDS RE-EQUILIBRIUM & EXPANSION. INDICATORS ARE TO BE FOUND IN THE INCREASED LEVELS OF INDUSTRY PRODUCTIVITY & COMPETITIVENESS AND THE SIGNIFICANT INDUSTRY ALLIANCE BEING FORGED BETWEEN MAJOR ITALIAN & FOREIGN CORPORATIONS. NOTEWORTHY, IN THIS REGARD ARE 1984 AND 1985 INDUSTRIAL INVESTMENT GROWTH FIGURES FOR MACHINERY AND EQUIPMENT WHICH TOTAL RESPECTIVELY 9.5% & 11.3% WITH OVERALL GROSS FIXED INVESTMENT GROWING BY 4.5%. MOREOVER, THE MILAN BOURSE HAS BECOM A FORCE IN THE INTERNATIONAL FINANCIAL SCENE. FOREIGN INVESTMENT, BOTH INDUSTRIAL & PORTFOLIO HAVE INCREASED RAPIDLY BOTH INTO ITALY FROM ITALIAN COMPANIES TO FOREIGN OPERATIONS. THE PRESENT ECONOMIC RESURGENCE SHOULD CONTINUE INTO THE SHORT TO MEDIUM TERM. THERE ARE GOOD PROSPECTS FOR CONTINUED EXPORT GROWTH INTO 1986. THOUGH PERHAPS AT SLIGHTLY LOWER RATES THAN IN 1985. 4% GROWTH IN DOMESTIC DEMAND AND 3% GROWTH IN GDP ARE FORECAST BY NATIONAL ECONOMIC INSTITUTIONS. EMPLOYMENTS SHOULD INCREASE BY 200,000 JOBS WHILE LOWER IMPORT PRICES SHOULD ENABLE THE CURRENT ACCOUNT, WHICH CLOSED LAST YEAR AT A DEFICIT OF L. 8,000 BN(\$3.7 BN) TO RECORD A SURPLUS AND ALSO TO ASSIST THE FALL IN INFLATION, CURRENTLY AT 6%. NEVERTHELESS, AND DESPITE THE CURRENT PUBLIC EUPHORIA OVER ITALIAN ECONOMIC PROSPECTS FOLLOWING THE FALL IN OIL PRICES, THE PUBLIC SECTOR BORROWING REQUIREMENTS ACCOUNTED FOR 16.1% OF THE GROSS DOMESTIC PRODUCT AS RECENTLY POINTED OUT BY THE GOVERNOR OF THE BANK OF ITALY, UNLESS THE COUNTRY'S PUBLIC DEFICIT IS REDUCED TO NORMAL PROPORTIONS IN RELATION TO NATIONAL INCOME, ITALY CANNOT BE INSURED LONG-TERM STABLE & BALANCED ECONOMIC GROWTH. WHILE THE GOVERNMENT'S CURRENT BUDGET PLAN ONLY CALLS FOR A 1% DEFICIT REDUCTION BY THE END OF 1986, THERE HAVE BEEN IMPORTANT ECONOMIC POLICY DECISIONS TAKEN IN THE PAST NINE MONTHS TO TACKLE ECONOMIC PROBLEMS. THESE HAVE INCLUDED A SETTLEMENT ON PUBLIC SERVICE WAGES, AND FROM THE POINT OF VIEW OF INDUSTRY, A USEFUL TAX CONCESSION GEARED TOWARDS ENCOURAGING INVESTMENT.

Export and Investment Promotion Planning System

REPT: SYN-GEO 87/88 A. Post export program priorities

Region: WESTERN EUROPE

Mission: 404 MILAN

Market: 237 ITALY

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

1. 005 COMM. & INFORM. EQP. & SERV

REASONS: THE ITALIAN GOVERNMENT & PRIVATE SECTOR ARE SPENDING MEGADOLLARS TO UPDATE THEIR COMMUNICATIONS & INFORMATICS SECTOR.

2. 002 FISHERIES, SEA PRODUCTS & SERV.

REASONS: ITALY IS ONE OF THE WORLD'S LARGEST IMPORTERS OF SEAFOOD. CANADIAN SALMON IS IN STRONG DEMAND PLUS OTHER SPECIES OF FRESH SEA FOOD (LOBSTER, CLAMS, SURIMI)

3. 009 FOREST PRODUCTS, EQUIP, SERVICES

REASONS: CURRENCY SHIFT HAS REOPENED ITALIAN MARKET. ITALY IS WORLD LEADER FOR SECONDARY WOOD PROCESSING EQUIPMENT. OPPORTUNITIES EXIST FOR JOINT VENTURES AND TECHNOLOGY TRANSFER.

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

1. 009 FOREST PRODUCTS, EQUIP, SERVICES
2. 010 MINE, METAL, MINERAL PROD & SRV
3. 001 AGRI & FOOD PRODUCTS & SERVICE

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 404 MILAN

Market: 237 ITALY

Sector: 002 FISHERIES, SEA PRODUCTS & SERV.

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1845.00M	\$ 1628.00M	\$ 1212.00M	\$ 833.00M
Canadian Exports \$	51.00M	\$ 40.80M	\$ 20.30M	\$ 14.20M
Canadian Share of Import Market	2.76%	2.50%	1.70%	1.70%

Major Competing Countries

Market Share

i) 112 FRANCE	015 %
ii) 410 NORWAY	014 %
iii) 093 DENMARK	014 %
iv) 499 SPAIN	012 %
v) 001 ARGENTINA	008 %
vi) 520 THAILAND	008 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are
good market prospects

Current Total Imports

	In Canadian \$
i) SALMON (FROZEN)	\$ 25.00 M
ii) COD	\$ 22.00 M
iii) SALMON (CANNED)	\$ 3.00 M
iv) LOBSTER	\$ 1.00 M
v) CRABS	\$ 0.30 M

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

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

Export and Investment Promotion Planning System

MISSION: 404 MILAN

COUNTRY: 237 ITALY

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

- the apparent limited sectoral capability in Canada compared to other competing export countries
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- other factor(s) described by the Trade Office as follows:
PACKAGING, HANDLING (I.E. MAJOR LIVE LOBSTER CONTRACT LOST
BECAUSE OF POOR HANDLING BY CANADIAN AIRLINE PRIMARILY TRANSITING

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

- participation in trade fairs
- use of Canadian Government export promotion activities
- strong sectoral capability in Canada

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

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

- product/service information from Canadian companies

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

Activity: CANADIAN COMPANIES ENQUIRIES REQUESTING DISTRIBUTORS HAVE SIGNIFICANTLY INCREASED. WE CONTINUE TO EXPAND OUR NETWORK OF DISTRIBUTORS AND BUYERS.

Results Expected: FOUR NEW MAJOR DISTRIBUTORS.

Activity: WE CONTINUE TO RESPOND TO ITALIAN ENQUIRIES RE CANADIAN AQUACULTURE TECHNIQUES (SERVICES).

Results Expected: NOT A QUANTIFIABLE SECTOR.

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

Activity: COMMERCIAL OFFICER WILL VISIT PACIFIC COAST FISHERIES INDUSTRY SEPT. 86 AND WILL BE ADVISING CDN. PRODUCERS OF ITALIAN MARKET REQUIREMENTS.

Results Expected: INCREASED ACTIVITY BY CANADIAN FISH/FOOD EXPORTERS OF AG. SMOKED SALMON, LIVE LOBSTER, CLAMS.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 404 MILAN

Market: 237 ITALY

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

Subsector: 056 ELECTRONIC COMPONENTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	2300.00M	\$ 2000.00M	\$ 1746.00M	\$ 1441.00M
Canadian Exports \$	17.00M	\$ 16.00M	\$ 14.50M	\$ 13.00M
Canadian Share of Import Market	0.74%	0.80%	0.83%	0.90%

Major Competing Countries

Market Share

i) 128 GERMANY WEST	20 %
ii) 112 FRANCE	17 %
iii) 354 NETHERLANDS	11 %
iv) 051 UNITED KINGDOM	11 %
v) 606 BENELUX COUNTRIES	7 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) PABX COMPONENTS	\$ 1100.00 M
ii) BUSES	\$ 600.00 M
iii) FIBRE OPTICS	\$ 600.00 M
iv) DATA ACQUISITION	\$ 500.00 M

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

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

Export and Investment Promotion Planning System

MISSION: 404 MILAN

COUNTRY: 237 ITALY

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

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

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

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- competitive export pricing for this market

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

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

- sourcing assistance from Canadian federal/provincial governments departments
- product/service information from Canadian companies

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

Activity: DEVELOP NEW CONTACTS IN NORTHERN ITALY IN MAJOR STATE HELD ENTITIES (E. G. ITALTEL)

Results Expected: OPEN SOURCING CONTACTS AT SENIOR PROCUREMENT LEVEL

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

Activity: FOLLOW UP RECOMMENDATIONS OF ITALIAN TEN YEAR TELECOMMUNICATIONS PLAN

Results Expected: DOUBLING OF EXISTING SALES('86) BY '88.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 404 MILAN

Market: 237 ITALY

Sector: 009 FOREST PRODUCTS, EQUIP, SERVICES

Subsector: 092 WOOD AND WOOD PRODUCTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1600.00M	\$ 1500.00M	\$ 1380.00M	\$ 1438.00M
Canadian Exports \$	30.00M	\$ 24.00M	\$ 19.20M	\$ 18.60M
Canadian Share of Import Market	1.90%	1.60%	1.40%	1.30%

Major Competing Countries

Market Share

i) 026 AUSTRIA	32 %
ii) 599 YUGOSLAVIA	12 %
iii) 577 UNITED STATES OF AMERICA	11 %
iv) 553 UNION OF SOVIET SOC REP	8 %
v) 507 SWEDEN	7 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) SAWN SOFTWOODS	\$ 500.00 M
ii) PLYWOOD	\$ 350.00 M
iii) SAWN HARDWOODS	\$ 300.00 M
iv) FABRICATED PRODUCTS	\$ 150.00 M
v) WOOD VENEERS	\$ 50.00 M
vi) FOREST FIRE FIGHTING EQUIPMENT	\$ 0.00 M

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

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

Export and Investment Promotion Planning System

MISSION: 404 MILAN

COUNTRY: 237 ITALY

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

- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies

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

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

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

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

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

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

Activity: COMPLETE FOREST PRODUCTS STRATEGY COORDINATING ACTIVITY OF COFI (COUNCIL OF FOREST INDUSTRIES FOR B.C.) AND BP IB (QUEBEC LUMBER MANUFACTURERS)

Results Expected: COORDINATED MARKETING APPROACH TO AVOID CDN ENTITIES COMPETING WITH EACH OTHER.

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

Activity: MILAN NOW HAS RESPONSIBILITY FOR ALL OF ITALY. DEVELOP NEW CONTACTS IN SOUTH.

Results Expected: ESTABLISH FOUR NEW MAJOR DISTRIBUTORS IN SOUTH.

Export and Investment Promotion Planning System

MISSION: 404 MILAN

COUNTRY: 237 ITALY

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

Activity: TRADE LIAISON VISIT TO ALL MAJOR BUYERS THROUGHOUT ITALY

Results Expected: EXPANDED SALES

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional Projects approved and planned for the coming fiscal year.		
Mission: 404 MILAN		
Sector: 001 AGRI & FOOD PRODUCTS & SERVICE		
010 FAIRS INT'L FOOD AND CATERING FAIR, RIMINI	RIMINI	0288
Sector: 005 COMM. & INFORM. EQP. & SERV		
010 FAIRS SMAU INT'L OFFICE EXH. (DATA PROCESSING EQPT.)	MILAN	0987
Sector: 006 ELECTRONICS EQUIP. & SERV		
010 FAIRS SMAU INT'L OFFICE EXH. (DATA PROCESSING EQPT)MILA MILAN		0987
BIAS-INT'L AUTOMATION, INSTRUM, MICROELECTRONICS CON MILAN		0388
Sector: 008 TRANSPORT SYS, EQUIP, COMP, SERV.		
020 MISSION OUTGOING AUTO PART MISSION/U. K. /ITALY/SPAIN	MILAN	0587
Sector: 009 FOREST PRODUCTS, EQUIP, SERVICES		
010 FAIRS WOOD IN BUILDING CONFERENCE	VERONA	1087
WOOD IN BUILDING CONFERENCE/TURIN	TURIN	0087
VISITS TO SPECIALIZED TRADE FAIR	BOLOGNA	1087
VISITS TO SPECIALIZED TRADE FAIRS	TRIESTE	0687
VISITS TO SPECIALIZED TRADE FAIRS	GENOA	0587
VISITS TO SPECIALIZED TRADE FAIRS	FORLI	0487
INFO BOOTH AT SAIE-DUE SHOW	BOLOGNA	0388
Sector: 010 MINE, METAL, MINERAL PROD & SRV		
020 MISSION OUTGOING TECHNICAL MISSION TO MAJOR ITALIAN BUYERS (COAL)		0087
Sector: 011 OIL & GAS EQUIPMENT, SERVICES		
024 MISSION INCOMING MISSION TO INTERCAN 87(OIL & GAS EQPT. SHOW)		0687
INCOMING BUYERS TO INTERCAN '87	EDMONTON	0687
Sector: 013 CONSUMER PRODUCTS		
010 FAIRS MILAN SPRING FAIR, MILAN, ITALY	MILAN	0487

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional Projects approved and planned for the coming fiscal year.		

Mission: 404 MILAN

Sector: 999 MULTIPLE SECTORS

010 FAIRS		
MILAN SPRING FAIR	MILAN	0487

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		

Mission: 404 MILAN

Sector: 001 AGRI & FOOD PRODUCTS & SERVICE

010 FAIRS		
ATTENDANCE AT TECNOCIBUS, ITL FOOD TECH. EXH.	PARMA	1088
INTL. FOOD EXHIBITION, RIMINI	RIMINI	0290
SPIRAL, MILAN, EXHIBITION OF FOOD PRODUCTS	MILAN	1189
CIBUS, PARMA, INTL FOOD EXHIBITION		0588
INTERNATIONAL AGRICULTURE FAIR	VERONA	0389
HORSE FAIR	VERONA	1190
HORSE FAIR	VERONA	1189
HORSE FAIR	VERONA	1188
INTERNATIONAL AGRICULTURE FAIR	VERONA	0390

020 MISSION OUTGOING		
PROMOTION OF CDN SEEDS AND PULSES/ITL SEED BOURSES		0488

024 MISSION INCOMING		
BIODYNAMIC FARMING GROUP MISSION		1089
INCOMING SWINE, CATTLE & HORSE BREEDERS MISSION		1088

Sector: 002 FISHERIES, SEA PRODUCTS & SERV.

010 FAIRS		
ANCONA FISHERY FAIR		0688
ANCONA FISHERY FAIR		0690
ANCONA FISHERY FAIR		0689

020 MISSION OUTGOING		
PROD'N & PUBLI'N OF BOOKLET ON CDN WILD SALMON		0488
DIRECT MAILING TO FISH IMPORTERS TO PROMOTE FISH		0488

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

010 FAIRS		
SMAU OFFICE EXHIBIT (DATA PROCESSING EQPT.)	MILAN	0989

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 404 MILAN		
Sector: 005 COMM. & INFORM. EQP. & SERV		
010 FAIRS SMAU OFFICE EXHIB. (DATA PROCESS. EQPT.)	MILAN	0988
Sector: 006 ELECTRONICS EQUIP. & SERV		
010 FAIRS TAO EXPO, TECH. FOR ENVIRONMENTAL & HUMAN PROTECTION		0390
024 MISSION INCOMING MISSION OF DISTRIBUTORS & REPS FOR SOFTWARE/HRDWRE		0089
Sector: 009 FOREST PRODUCTS, EQUIP, SERVICES		
010 FAIRS INTERBIMALL	MILAN	0588
WOOD IN BUILDING CONFERENCE	MILAN	0588
COLLECTIVE CDN STAND AT SAIE-UNO	BOLOGNA	1089
MINI INFO BOOTH AT FORLI FAIR	FORLI	0390
MINI INFO BOOTH AT TRIESTE FAIR	TRIESTE	0689
MINI INFO BOOTH AT RIHABITAT FAIR	GENOA	0589
MINI INFO BOOTH AT FORLI FAIR	FORLI	0489
INFO BOOTH AT SAIE-DUE FAIR	BOLOGNA	0389
MINI INFO BOOTH AT SAIE-UNO FAIR	BOLOGNA	1088
MINI INFO BOOTH AT TRIESTE FAIR (LUMBER)	TRIESTE	0688
MINI INFO BOOTH AT SASMIL FAIR	MILAN	0588
MINI INFO BOOTH AT FORLI FAIR	FORLI	0488
020 MISSION OUTGOING DIRECT MAILING OF TECHNICAL/COMMERCIAL INFO		0488
OUTGOING CANADIAN SELLERS MISSION		1089
TECHNICAL MISSION OF VALUE ADDED MFTD PAPER PROD.		1289
OUTGOING TF MISSION	BOLOGNA	1088
024 MISSION INCOMING INCOMING LUMBER & PLYWOOD BUYERS TO QUEBEC & B. C.		0089
Sector: 010 MINE, METAL, MINERAL PROD & SRV		
010 FAIRS COLLECTIVE CANADIAN STAND AT VERONA SHOW	VERONA	0989
MINI INFO BOOTH, CARRARA SHOW	CARRARA	0688
MINI INFO BOOTH, CARRARA SHOW	CARRARA	0689
MINI INFO BOOTH, VERONA SHOW	VERONA	0988
024 MISSION INCOMING ITALIAN BUYERS MISSION TO QUEBEC/OTHER PROVINCES		1289

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 404 MILAN		
Sector: 010 MINE, METAL, MINERAL PROD & SRV		
024 MISSION INCOMING BUYERS MISSION (COAL) TO BC/ALTA		0788
Sector: 012 PETROCHEM & CHEM PROD, EQP, SERV		
010 FAIRS MINI INFO BOOTH AT RICH AND MACE SHOW	MILAN	1088
020 MISSION OUTGOING DIRECT MAILING OF TECHNICAL/COMMERCIAL INFO		0488
024 MISSION INCOMING INCOMING BUYERS MISSION		0089
Sector: 013 CONSUMER PRODUCTS		
020 MISSION OUTGOING CDN FURNITURE MFTRS MISSION FISH SKIN LEATHER MISSION		0988 0688
024 MISSION INCOMING ITL FURNITURE MFTRS AND DESIGNERS MISSION		0488
Sector: 016 INDUSTRIAL MACHIN, PLANTS, SERV.		
024 MISSION INCOMING SEWAGE AND WATER TREATMENT		0090
Sector: 999 MULTIPLE SECTORS		
020 MISSION OUTGOING ADVERTISING FORESTRY PRODS & MARBLE & GRANITE		0488

Export and Investment Promotion Planning System

87/88 Trade and Economic Overview

Mission: 406 LISBON

Country: 448 PORTUGAL

IMPROVEMENTS IN KEY INDICATORS POINT TO CONTINUED EXPANSION IN THE PORTUGUESE ECONOMY. AFTER TWO YEARS OF NEGATIVE GROWTH, THE REAL INCREASE IN GDP FOR 1985 IS ESTIMATED AT +2.8%. THE GOVERNMENT EXPECTS THAT GDP GROWTH WILL BE 3.5% IN 1986 AND REMAIN AT 4-5% TO THE END OF THE DECADE. (THE ECONOMIST FORECASTS 3.9% IN 1986 BUT 3.1% IN 1987). INFLATION RATES ARE EXPECTED TO DECLINE FROM 19.3% IN 1985 TO 14% IN 1986, AND TO 4% BY 1990. GROSS FIXED CAPITAL FORMATION IS EXPECTED TO REMAIN AT 8-10% OVER THAT PERIOD WHILE GROWTH IN THE IMPORTS BILL IS SEEN AS DECLINING FROM 10.5% IN 1986 TO 5.5% BY 1990. EXPORTS ARE EXPECTED TO MAINTAIN THE 1986 GROWTH RATE OF ABOUT 6% P.A. AMONG THE FACTORS WHICH CONTRIBUTE TO THE POSITIVE 1986 OUTLOOK, THE MOST SIGNIFICANT IS THE DECLINE IN OIL PRICES, WHICH IS ESTIMATED TO SAVE PORTUGAL ABOUT US \$1 BILLION. LOWER INTEREST RATES SAVED THE COUNTRY AN ADDITIONAL US \$150-200 MILLION. THE FALL OF THE VALUE OF THE DOLLAR VIS-A-VIS EUROPEAN CURRENCIES ALSO AUGMENTED THE CONTRIBUTION WHICH EMIGRANT REMITTANCES MAKE TO THE COUNTRY'S NATIONAL ACCOUNTS, AND THE IMPACT OF THE TOURISM SECTOR. THE CURRENT ACCOUNTS BALANCE AT MID-1986 WAS POSITIVE (US \$306 MILLION) AND BY YEAR-END SHOULD DOUBLE TO ABOUT US \$700 MILLION. CONSERVATIVELY, PERHAPS OVERLY SO, THE GOVERNMENT FORECASTS NEGATIVE BALANCES OF US \$1 BILLION TO 1990. AFTER ONE YEAR IN POWER, THE MINORITY GOVERNMENT SEEMS CONFIDENT THAT NO EARLY ATTEMPTS WILL BE MADE BY THE OPPOSITION TO BRING IT DOWN. THE TRENDS TOWARDS A FREER MARKET ECONOMY CONTINUE WITH THE DISMANTLING OF SOME OF THE GOVERNMENT CONTROLS IN, E.G. THE NATIONAL AIRLINE. ALTHOUGH THE 1987 BUDGET TABLED ON 15 OCTOBER 1986 DOES LITTLE TO SATISFY THE OPPOSITION, LOCAL OBSERVERS EXPECT NO MAJOR DEBATES ON IT, LET ALONE THE FALL OF THE GOVERNMENT. THERE ARE OF COURSE NO GUARANTEES ON THE LIFE OF THE CURRENT GOVERNMENT BUT, IF IT CAN CONTINUE TO PUT ORDER IN THE ECONOMY AND MAINTAIN AN IMAGE OF GOOD MANAGEMENT, IT MAY REMAIN IN POWER BEYOND THE SPRING OF 1987.

Export and Investment Promotion Planning System

REPT: SYN-GEO 87/88 A. Post export program priorities

Region: WESTERN EUROPE

Mission: 406 LISBON

Market: 448 PORTUGAL

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

1. 003 GRAINS AND OILSEEDS

REASONS: CEREALS MARKET OPENED IN 1986 FOR WHEAT AND BARLEY. CANOLA MARKET IS EXPECTED TO OPEN EARLY IN 1987.

2. 001 AGRI & FOOD PRODUCTS & SERVICE

REASONS: ALTHOUGH DUE TO LATE ISSUANCE OF PERMITS, SEED POTATO EXPORTS DECLINED SHARPLY IN 1986, CDN INTEREST IN THE PORTUGUESE MKT REMAINS HIGH. PROMOTION OF SEMEN & DAIRY CATTLE HAS ELICITED SIGNIF. INTEREST IN PORTUGAL

3. 002 FISHERIES, SEA PRODUCTS & SERV.

REASONS: COD SALES SLOWED DOWN IN 1986 AND CANADIAN EXPORTERS ARE INTERESTED IN REGAINING LOST POSITIONS.

4. 005 COMM. & INFORM. EQP. & SERV

REASONS: PORTUGUESE COMMUNICATIONS AND INFORMATICS MARKETS SHOULD EXPAND RAPIDLY. INITIAL CONTACTS BY INFORMATICS COMPANIES POINT TO SIGNIFICANT MUTUAL INTEREST.

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

1. 003 GRAINS AND OILSEEDS
2. 010 MINE, METAL, MINERAL PROD & SRV
3. 002 FISHERIES, SEA PRODUCTS & SERV.
4. 001 AGRI & FOOD PRODUCTS & SERVICE

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 406 LISBON

Market: 448 PORTUGAL

Sector: 001 AGRI & FOOD PRODUCTS & SERVICE

Subsector: 011 ANIMAL, POULTRY BREEDING STOCK

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	20.00M	\$ 18.00M	\$ 24.00M	\$ 7.80M
Canadian Exports \$	1.00M	\$ 0.07M	\$ 0.07M	\$ 0.20M
Canadian Share of Import Market	5.00%	0.40%	0.29%	2.60%

Major Competing Countries

Market Share

i) 354 NETHERLANDS	053 %
ii) 051 UNITED KINGDOM	025 %
iii) 128 GERMANY WEST	015 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are
good market prospects

Current Total Imports

i) SEMEN	In Canadian \$
ii) DAIRY CATTLE	\$ 0.00 M
iii) POULTRY	\$ 0.00 M

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

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

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

- non competitive pricing

Export and Investment Promotion Planning System

MISSION: 406 LISBON

COUNTRY: 448 PORTUGAL

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

- No factors reported by mission

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

Activity: FOLLOW-UP RE 2 DAIRY CATTLE SEMINARS HELD IN OCT/86, ONE IN LISBON AND THE OTHER IN PORTO.

Results Expected: RE-ESTABLISH CANADIAN PRESENCE IN MARKET FOR LIVE CATTLE.

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

Activity: MAINTAIN AND EXPAND CONTACTS NETWORK.

Results Expected: ENSURE THAT INTEREST EXPRESSED IN CANADIAN CATTLE WILL BE MAINTAINED OR INCREASED.

Activity: ENCOURAGE CANADIAN EXPORTERS TO VISIT THE COUNTRY WHERE APPROPRIATE.

Results Expected: INCREASE NUMBER OF CANADIAN FIRMS ACTIVE IN PORTUGAL (CURRENTLY TWO), TO AT LEAST FIVE.

Activity: SUPPORT LOCAL REPRESENTATIVES OF CANADIAN EXPORTERS.

Results Expected: ENSURE THAT CANADIAN FIRMS WILL NOT MISS OPPORTUNITIES THAT EXIST OR WILL DEVELOP.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 406 LISBON

Market: 448 PORTUGAL

Sector: 002 FISHERIES, SEA PRODUCTS & SERV.

Subsector: 021 FISH & SHELLFISH & OTHER PROD

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	260.00M	\$ 260.00M	\$ 253.00M	\$ 141.00M
Canadian Exports \$	52.00M	\$ 52.00M	\$ 61.00M	\$ 28.00M
Canadian Share of Import Market	20.00%	20.00%	24.00%	20.00%

Major Competing Countries

	Market Share
i) 410 NORWAY	050 %
ii) 075 CANADA	020 %
iii) 405 ICELAND	020 %

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

Current status of Canadian exports: Mature with little growth

Products/services for which there are
good market prospects

- i) COD
- ii) SQUID (ILLEX TYPE)
- iii) HAKE

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

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

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

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

- other factor(s) described by the Trade Office as follows:
PORTUGAL'S ENTRY INTO EEC LONG HISTORY OF GOOD BILATERAL
RELATIONS WITH CANADA.

Export and Investment Promotion Planning System

MISSION: 406 LISBON

COUNTRY: 448 PORTUGAL

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

- the existence of a bilateral economic/trade arrangement between Canada and this country

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

Activity: FOSTER CONTINUED GOOD POLITICAL AND COMMERCIAL RELATIONS IN SECTOR.

Results Expected: MAXIMIZE ACCESS OF CANADIAN PRODUCERS TO THE MARKET.

Activity: MAINTAIN AND EXPAND CONTACTS WITH COD IMPORTERS AND DISTRIBUTORS.

Results Expected: INCREASE AWARENESS OF CANADIAN FISHERIES PRODUCTS AND SOURCES OF SUPPLY.

Activity: INFORM EXTOTT AND INDUSTRY OF MARKET DEVELOPMENTS.

Results Expected: FACILITATE FORMULATION OF MARKET STRATEGIES.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 406 LISBON

Market: 448 PORTUGAL

Sector: 003 GRAINS AND OILSEEDS

Subsector: 032 OILSEEDS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	460.00M	\$ 460.00M	\$ 465.00M	\$ 558.00M
Canadian Exports \$	23.00M	\$ 0.00M	\$ 0.00M	\$ 0.00M
Canadian Share of Import Market	5.00%	0.00%	0.00%	0.00%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	060 %
ii) 047 BRAZIL	011 %
iii) 001 ARGENTINA	011 %
iv) 011 AUSTRALIA	005 %

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

Current status of Canadian exports: No Export results to date

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

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

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

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

- other factor(s) described by the Trade Office as follows:
USE OF CANOLA OIL FOR FOOD APPLICATIONS HAD UNTIL 1986 BEEN FORBIDDEN.

Export and Investment Promotion Planning System

MISSION: 406 LISBON

COUNTRY: 448 PORTUGAL

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

- No factors reported by mission

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

Activity: MAILING OF PROMOTIONAL LITERATURE.

Results Expected: INCREASED POTENTIAL BUYER AWARENESS OF CDN
PRODUCT CHARACTERISTICS AND ADVANTAGES.

Activity: FOLLOW-UP MAILING WITH RESPONSE REQUESTED.

Results Expected: DEFINITION OF INTEREST LEVEL AND MARKET
POTENTIAL.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 406 LISBON

Market: 448 PORTUGAL

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

Subsector: 054 COMPUTERS, SOFTWARE & SYSTEMS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	230.00M	\$ 200.00M	\$ 182.00M	\$ 136.00M
Canadian Exports \$	5.00M	\$ 0.00M	\$ 0.00M	\$ 0.00M
Canadian Share of Import Market	2.00%	0.00%	0.00%	0.00%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	036 %
ii) 051 UNITED KINGDOM	017 %
iii) 265 JAPAN	010 %
iv) 128 GERMANY WEST	010 %

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

Current status of Canadian exports: No Export results to date

Products/services for which there are good market prospects

Current Total Imports In Canadian \$	
i) SOFTWARE	\$ 0.00 M
ii) NETWORKS	\$ 0.00 M
iii) CONSULTING	\$ 0.00 M

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

i) Project Name: GEOGRAPHIC INFORMATION SYSTEM
Approximate Value: \$ 10 M
Financing Source: 012 DOM
For further info. please contact:
L. BUSTOS EMBASSY TLX: (D. CODE 404) 12377

Export and Investment Promotion Planning System

MISSION: 406 LISBON

COUNTRY: 448 PORTUGAL

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

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

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

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

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

- No factors reported by mission

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

Activity: EXPANSION OF POST CONTACTS WITH INDUSTRY REPRESENTATIVES FOR SOFTWARE PACKAGE / IN GT SYSTEMS.

Results Expected: ASSESSMENT OF MARKET POTENTIAL TRENDS AND ESTABLISHMENT OF AT LEAST 2 CDN SOFTWARE LOG ON THE PORTUGUESE MKT.

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

Activity: DIRECT MAILINGS OF PROMOTIONAL MATERIAL AND DOCUMENTATION TO OFFICIALS OF ENV DEPT, PLANIFICATION DEPT.

Results Expected: INCREASED POTENTIAL BUYER AWARENESS OF CDN CAPABILITIES AND INTERESTS IN ENVIRONMENTAL CONTROLS.

Activity: SEMINARS (WITH INDUSTRY PARTICIPATION).

Results Expected: TARGETED PROMOTION.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 406 LISBON

Market: 448 PORTUGAL

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

Subsector: 055 BROADCASTING (INC CATV)

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	6.00M	\$ 3.00M	\$ 4.00M	\$ 4.00M
Canadian Exports \$	1.00M	\$ 0.00M	\$ 0.00M	\$ 0.00M
Canadian Share of Import Market	20.00%	0.00%	0.00%	0.00%

Major Competing Countries

Market Share

i) 128 GERMANY WEST	040 %
ii) 265 JAPAN	020 %
iii) 051 UNITED KINGDOM	010 %
iv) 577 UNITED STATES OF AMERICA	005 %

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

Current status of Canadian exports: No Export results to date

Products/services for which there are good market prospects

Current Total Imports
In Canadian \$

i) CATV	\$ 0.00 M
ii) STUDIO EQUIPMENT	\$ 0.00 M

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

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

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

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

Export and Investment Promotion Planning System

MISSION: 406 LISBON

COUNTRY: 448 PORTUGAL

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

- No factors reported by mission

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

Activity: CONTINUING SUPPORT FOR LOCAL PRESENCE OF CANADIAN EXPORTERS.

Results Expected: IMPROVED ABILITY OF CANADIAN EXPORTER TO CAPITALIZE ON OPENING MARKET OPPORTUNITIES.

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

Activity: EXPANSION OF POST'S CONTACTS NETWORK AND IDENTIFY BUSINESS OPPORTUNITIES AS THEY APPEAR.

Results Expected: INCREASED LOCAL AWARENESS OF CANADIAN CAPABILITIES AT LEAST IN NEW AGENCY AGREEMENT.

Activity: SEMINARS (WITH INDUSTRY PARTICIPATION) ON CATV/SATELLITE GROUND STATION.

Results Expected: TO FACILITATE APPROPRIATE ONE-ON-ONE COMMERCIAL CONTACTS.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 406 LISBON

Market: 448 PORTUGAL

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

Subsector: 085 AEROSPACE

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	16.00M	\$ 1.00M	\$ 0.50M	\$ 68.00M
Canadian Exports \$	14.00M	\$ 0.00M	\$ 0.00M	\$ 0.00M
Canadian Share of Import Market	87.00%	0.00%	0.00%	0.00%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA

090 %

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

15-30 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are
good market prospects

Current Total Imports

In Canadian \$

- i) DASH-8
- ii) CL-215

- \$ 0.00 M
- \$ 0.00 M

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

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

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

- other factor(s) described by the Trade Office as follows:

SINCE 1979 (SALE OF 2 TWIN OTTER AIRCRAFT) NO REQUIREMENTS FOR
COMMUTER AIRCRAFT.

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

- Canada's position as one of the few major sources of international supply

Export and Investment Promotion Planning System

MISSION: 406 LISBON

COUNTRY: 448 PORTUGAL

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

Activity: FOLLOW-UP ON LOCAL REGIONAL SERVICES AIRLINE (LAR) INTEREST IN DASH-8, AS RESULT OF AIRCRAFT DEMONSTRATION (SEPT. 86).

Results Expected: MAINTAIN AWARENESS OF THE TECHNICAL AND ECONOMIC ADVANTAGES OF DASH-8.

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

Activity: CONTINUED SUPPORT OF THE DE HAVILLAND'S PROMOTIONAL ACTIVITIES TO SELL THE DASH-8.

Results Expected: ENHANCE PERCEPTION AT LAR OF DASH-8 AS THE MOST SUITABLE AIRCRAFT TO MEET THEIR REQUIREMENTS.

Activity: CONTINUE OUR EFFORTS IN SUPPORT OF CANADAIR'S PROMOTIONAL ACTIVITIES RE CL-215 VIA SPECIAL AGENTS SUCH AS AVOID-VILUAL PRESENTATIONS.

Results Expected: IMPROVE PERCEPTION OF LOCAL AUTHORITIES THAT CL-215 IS THE MOST SUITABLE AIRCRAFT TO FIGHT FOREST FIRES IN PORTUGAL.

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional Projects approved and planned for the coming fiscal year.		
Mission: 406 LISBON		
Sector: 001 AGRI & FOOD PRODUCTS & SERVICE		
010 FAIRS FEIRA-AGRICULTURAL PROD., LIVE-STOCK EQUIP., TECHN., SANTAREM		0687
Sector: 006 ELECTRONICS EQUIP. & SERV		
010 FAIRS INFORPOR '87-OFFICE ELECTRONICS COMPUTERS, TELECOM.)P PORTO		1287
Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 406 LISBON		
Sector: 001 AGRI & FOOD PRODUCTS & SERVICE		
010 FAIRS AGRO 89	BRAGA	0489
024 MISSION INCOMING INCOMING CATTLE MISSION		0988
Sector: 003 GRAINS AND OILSEEDS		
024 MISSION INCOMING INCOMING WHEAT MISSION		0989
Sector: 999 MULTIPLE SECTORS		
010 FAIRS FEIRA INTERNACIONAL DE LISBOA-FIL	LISBON	0588

Export and Investment Promotion Planning System

87/88 Trade and Economic Overview

Mission: 407 MADRID

Country: 499 SPAIN

THE THREE MOST SIGNIFICANT ECONOMIC EVENTS IN SPAIN DURING 1986 HAVE BEEN THE COUNTRY'S ENTRY INTO THE EC, ITS DECISION TO REMAIN IN NATO, AND A 30% INCREASE IN THE VALUE OF THE PESETA AGAINST THE DOLLAR. SPAIN HAS ABSORBED THE IMMEDIATE SHOCKS OF COMMON MARKET ENTRY WITHOUT LOSING STRIDE. BASIC STRUCTURAL REFORMS WELL UNDER WAY ARE CREATING A MUCH STRONGER ECONOMIC BASE WHICH SHOULD ENSURE THAT SPAIN WILL BENEFIT GREATLY FROM EC MEMBERSHIP. WHILE CANADA HAS LOST A SIGNIFICANT MARKET FOR FEED GRAINS; OUR MARKET ACCESS FOR RESOURCE PRODUCTS, MANUFACTURED GOODS & FISHERIES PRODUCTS WILL IMPROVE. CONTINUED MEMBERSHIP IN NATO WILL ENSURE SPAIN'S ACCESS HIGH TECHNOLOGY WHICH IS KEY TO THE GOVERNMENT'S PLANS FOR ECONOMIC MODERNIZATION. CANADIAN COMPANIES WITH SPECIALIZED PRODUCTS & SERVICES WILLING TO ENTER INTO INDUSTRIAL COOPERATION AGREEMENTS WITH SPAIN FIRMS WILL BENEFIT FROM THE NATO UMBRELLA. THE DEVALUATION OF THE DOLLAR WILL MAKE CANADIAN COMPANIES MORE COMPETITIVE IN ALL SECTORS AND SHOULD SOON START TO NARROW OUR TRADE DEFECIT WITH SPAIN WHICH WAS OVER \$ 250 MILLION IN 1985. WITH THE EXCEPTION OF UNEMPLOYMENT (OFFICIALLY ABOUT 17%) AND THE PUBLIC DEFICIT (4.8% OF GDP), BOTH OF WHICH HAVE BEGUN TO FALL, SPAIN HAS A VERY HEALTHY SET OF ECONOMIC INDICATORS I. E. FOREIGN EXCHANGE RESERVES OF \$22 BILLION, REAL GDP GROWTH OF 3%, GROSS CAPITAL FORMATION INCREASING AT 7.5%, INTERNAL DEMAND GROWING AT 3.9%, A 1986 CURRENT ACCOUNT SURPLUS PROJECTED AT \$ 9 BILLION AND AN INFLATION RATE OF ABOUT 9% IN 1986 EXPECTED TO FALL TO 5% IN 1987. OVER THE PAST YEAR SPAIN HAS BECOME A MUCH MORE ATTRACTIVE MARKET FOR CANADA AND SHOULD REMAIN SO FOR THE FORESEEABLE FUTURE. THE QUESTION NOW BECOMES HOW LONG WILL IT TAKE BEFORE CANADIAN EXPORTERS EXPLOIT THE OPPORTUNITIES.

Export and Investment Promotion Planning System

REPT: SYN-GEO 87/88 A. Post export program priorities

Region: WESTERN EUROPE

Mission: 407 MADRID

Market: 499 SPAIN

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

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

REASONS: URBAN TRANSPORTATION SYSTEMS WILL BE UPGRADED IN BARCELONA FOR THE 92 OLYMPICS & IN SEVILLE FOR THE 92 WORLD'S FAIR. SPAIN PLANS TO EXPAND ITS THIRD LEVEL AIRLINES SIGNIFICANTLY.

2. 004 DEFENCE PROGRAMS, PRODUCTS, SERV

REASONS: SPAIN IMPORTS APPROXIMATELY \$800 MILLION OF DEFENCE EQUIPMENT ANNUALLY AND IS INTERESTED IN INDUSTRIAL COOPERATION WITH CANADA IN ORDER TO IMPROVE ITS TECHNOLOGICAL BASE.

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

REASONS: SPAIN WILL SOON PASS A NEW COMMUNICATIONS LAW WHICH SHOULD CREATE A SUBSTANTIAL MARKET FOR CABLE AND SATELLITE T.V. EQUIP. AND COULD ALSO LIBERALIZE ACCESS FOR SWITCHING AND PABX EQUIPMENT AND MODEMS.

4. 016 INDUSTRIAL MACHIN, PLANTS, SERV.

REASONS: SPAIN IMPORTS SOME \$6 BILLION OF INDUSTRIAL MACHINERY ANNUALLY. OPPORTUNITIES FOR INDUSTRIAL COOPERATION, TRANSFER OF TECHNOLOGY & LICENSING ARRANGEMENTS IN THIS SECTOR ARE ALSO EXCELLENT.

5. 002 FISHERIES, SEA PRODUCTS & SERV.

REASONS: SPAIN IS THE LARGEST CONSUMER OF FISHERIES PRODUCTS IN WESTERN EUROPE. ANNUAL IMPORTS ARE \$500 MILLION. SPAIN'S EMBARGO ON CANADIAN FISHERIES PRODUCTS HAS RECENTLY ENDED. THE DOLLAR HAS DEPRECIATED SIGNIFICANTLY.

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

1. 010 MINE, METAL, MINERAL PROD & SRV
2. 009 FOREST PRODUCTS, EQUIP, SERVICES
3. 008 TRANSPORT SYS, EQUIP, COMP, SERV.
4. 001 AGRI & FOOD PRODUCTS & SERVICE
5. 013 CONSUMER PRODUCTS
6. 014 EDUCATION, MEDICAL, HEALTH PROD

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 407 MADRID

Market: 499 SPAIN

Sector: 002 FISHERIES, SEA PRODUCTS & SERV.

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	550.00M	\$ 550.00M	\$ 535.00M	\$ 552.00M
Canadian Exports \$	2.50M	\$ 0.00M	\$ 0.00M	\$ 0.00M
Canadian Share of Import Market	0.50%	0.00%	0.00%	0.00%

Major Competing Countries

Market Share

i) 609 EUROPEAN COMMON MARKET C	004 %
ii) 115 MOROCCO	002 %
iii) 405 ICELAND	001 %
iv) 001 ARGENTINA	001 %
v) 068 CHILE	001 %
vi) 499 SPAIN	080 %

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

Current status of Canadian exports: No Export results to date

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) WET SALTED COD	\$ 44.60 M
ii) FROZEN ILLEX SQUID	\$ 63.00 M
iii) MONKFISH TAILS	\$ 0.00 M
iv) SALMON (FRESH)	\$ 10.30 M
v) FLOUNDER	\$ 0.20 M
vi) LIVE CLAMS	\$ 0.00 M
vii) LIVE LOBSTER	\$ 2.30 M
viii) CANNED SALMON	\$ 0.00 M

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

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

Export and Investment Promotion Planning System

MISSION: 407 MADRID

COUNTRY: 499 SPAIN

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

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

SPAIN EMBARGOED IMPORTS OF FISH FROM CANADA FOR ABOUT 5 YEARS AND CONTACTS BETWEEN SUPPLIERS AND BUYERS CEASED ALMOST ENTIRELY.

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

- No factors reported by mission

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

- product/service information from Canadian companies

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

Activity: CONTINUE TO KEEP IN REGULAR CONTACT WITH MAJOR SPANISH FISH IMPORTERS AND SUPPLY THEM WITH PRODUCT INFO.

Results Expected: RE-ESTABLISH CONTACTS BETWEEN CANADIAN SUPPLIERS AND SPANISH IMPORTERS.

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

Activity: ASSIST SPANISH FISHING COMPANIES WHO HAVE EXPRESSED INTEREST IN INVESTING IN CANADIAN FISHERIES SECTOR.

Results Expected: OPEN MORE DIRECT LINKS WITH SPANISH MARKET AND THIRD COUNTRY MARKETS TRADITIONALLY SERVICED BY SPANISH COS.

Activity: WRITE ARTICLE ON MARKET FOR FISHERIES PRODUCTS IN SPAIN AND DISSEMINATE IT TO CDN. INDUSTRY.

Results Expected: STIMULATE CDN. COMPANIES TO TREAT SPANISH MARKET SERIOUSLY.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 407 MADRID

Market: 499 SPAIN

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1000.00M	\$ 800.00M	\$ 600.00M	\$ 500.00M
Canadian Exports \$	5.00M	\$ 3.00M	\$ 2.00M	\$ 3.00M
Canadian Share of Import Market	0.50%	0.40%	0.30%	0.60%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	018 %
ii) 112 FRANCE	015 %
iii) 128 GERMANY WEST	003 %
iv) 051 UNITED KINGDOM	001 %
v) 499 SPAIN	060 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are
good market prospects

Current Total Imports

	In Canadian \$
i) CL 215 AIRCRAFT	\$ 70.00 M
ii) MICROWAVE LANDING SYSTEMS	\$ 0.00 M
iii) HELICOPTER HAUL-DOWN SYSTEMS	\$ 7.00 M
iv) AIRCRAFT AND ATC TEST EQPT.	\$ 0.00 M
v) RADIOS	\$ 0.00 M
vi) ASW EQPT.	\$ 0.00 M
vii) SURVEILLANCE VEHICLES	\$ 0.00 M

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

i) Project Name: EUROPEAN FIGHTER AIRCRAFT
Approximate Value: \$ 4000 M
Financing Source: 012 DOM
For further info. please contact:
K. L. BARNABY (613)996-0639

Export and Investment Promotion Planning System

MISSION: 407 MADRID

COUNTRY: 499 SPAIN

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

ii) Project Name: NATO FRIGATE REPLACEMENT (NFR-90)

Approximate Value: \$ 1000 M

Financing Source: 012 DOM

For further info. please contact:

K. L. BARNABY (613)996-0639

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

- exports of certain products or services to this country are subject to Canadian export controls
- the degree of import duty protection of local industry tends to be moderate

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

- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- other factor(s) described by the Trade Office as follows:
SPAIN DEMANDS SIGNIFICANT INDUSTRIAL OFFSETS ON MAJOR DEFENCE PURCHASES. THIS CAN BE AN ADVANTAGE IF CDN SUPPLIERS ARE PREPARED TO DISCUSS INDUSTRIAL COOPERATION WITH LOCAL COS.

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

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- use of Canadian Government export promotion activities
- Canada's position as one of the few major sources of international supply

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

Activity: POST IS IN PROCESS OF ESTABLISHING NEW CONTACTS WITH MOD PURCHASING DIRECTORATES, THE ASSOCIATION OF DEFENCE EQPT. MFRS AND MAJOR LOCAL DEFENCE CONTRACTORS.

Results Expected: STIMULATE SPANISH DECISION-MAKERS TO CONSIDER CDN COS AS JOINT-VENTURE PARTNERS ON NEW MAJOR DEVELOPMENT PROGRAMS.

Export and Investment Promotion Planning System

MISSION: 407 MADRID

COUNTRY: 499 SPAIN

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

Activity: ASSIST CANADAIR IN ITS EFFORTS TO CONVINCCE FOREST PROTECTION AGENCY AND SPANISH AIR FORCE TO MODERNIZE EXISTING FLEET OF CL215 S AND ADD TO IT.

Results Expected: SPAIN HAS JUST EXPERIENCED WORST FIRE SEASON EVER AND THERE IS POTENTIAL FOR \$ 100 MILLION SALE.

Activity: PREPARE NEW MARKET GUIDE AND CONTACT LIST FOR DISTRIBUTION AT HI-TEC.

Results Expected: ASSIST 5 CDN COMPANIES TO FIND REPRESENTATION IN SPAIN.

Activity: FOLLOW UP INTEREST EXPRESSED BY SPANISH CONSORTIUM IN WORKING WITH MICRONAV TO ESTABLISH MANUFACTURE OF MICROWAVE LANDING SYSTEM IN SPAIN.

Results Expected: SPAIN IS DETERMINED TO MAXIMIZE LOCAL CONTENT FOR ITS FUTURE MLS REQUIREMENTS. A JV IS THE ONLY WAY TO GET A SHARE OF THE MARKET.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 407 MADRID

Market: 499 SPAIN

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

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	3533.00M	\$ 3141.00M	\$ 2743.00M	\$ 1815.00M
Canadian Exports \$	6.50M	\$ 5.40M	\$ 4.05M	\$ 4.70M
Canadian Share of Import Market	0.18%	0.17%	0.14%	0.31%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	012 %
ii) 051 UNITED KINGDOM	007 %
iii) 128 GERMANY WEST	005 %
iv) 265 JAPAN	004 %
v) 507 SWEDEN	004 %
vi) 499 SPAIN	045 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) COMPUTERS, SOFTWARE AND SYSTEMS	\$ 832.00 M
ii) BROADCAST, INCL. CATV, ETC.	\$ 350.00 M
iii) ELECTRONIC COMPONENTS	\$ 243.00 M
iv) TELECOMMUNICATION EGPT.	\$ 56.00 M

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

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

Export and Investment Promotion Planning System

MISSION: 407 MADRID

COUNTRY: 499 SPAIN

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

- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- high tariffs
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

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

- support provided by the PEMD program
- participation in trade fairs
- use of Canadian Government export promotion activities
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada

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

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

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

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

Activity: REPORT DETAILS OF NEW COMMUNICATION LAW WHICH IS EXPECTED TO BE PASSED SOON.

Results Expected: LAW SHOULD IMPROVE MARKET ACCESS FOR BROAD RANGE OF CDN. PRODUCTS.

Activity: INTENSIFY CONTACT WITH AND PROVIDE ASSISTANCE TO CDN INDUSTRY IN VIEW OF SPAIN'S APPARENT DECISION NOT TO JOIN EUROTEL CONSORTIUM.

Results Expected: THERE SEEMS TO BE NEW POSSIBILITIES TO MARKET PABX EQUIPMENT IN SPAIN.

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

Activity: ENCOURAGE AND ASSIST CDN. COMPANIES TO CONTACT LOCAL SPANISH COMPANIES IN THE CABLE AND SATELLITE SUBSECTOR FOR PARTICIPATION IN NEW MAJOR PROJECTS.

Results Expected: INTRODUCE 5 CDN. COMPANIES TO THE MARKET.

Export and Investment Promotion Planning System

MISSION: 407 MADRID

COUNTRY: 499 SPAIN

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

Activity: PREPARE AN ARTICLE ON THE COMMUNICATIONS MARKET IN SPAIN AND OFFER IT TO CDN. TRADE MAGAZINES FOR POSSIBLE PUBLICATION.

Results Expected: ALERT AS MANY CDN. COMPANIES AS POSSIBLE TO GENERAL MARKET CONDITIONS IN SPAIN.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 407 MADRID

Market: 499 SPAIN

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

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	3200.00M	\$ 2700.00M	\$ 2400.00M	\$ 2250.00M
Canadian Exports \$	10.00M	\$ 7.00M	\$ 5.60M	\$ 4.00M
Canadian Share of Import Market	0.32%	0.28%	0.25%	0.20%

Major Competing Countries

Market Share

i) 128 GERMANY WEST	012 %
ii) 112 FRANCE	009 %
iii) 577 UNITED STATES OF AMERICA	004 %
iv) 237 ITALY	003 %
v) 051 UNITED KINGDOM	002 %
vi) 499 SPAIN	060 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are
good market prospects

Current Total Imports

i) URBAN TRANSIT	In Canadian \$
ii) COMMUTER AIRCRAFT	\$ 0.00 M
iii) CONSULTING SERVICES	\$ 0.00 M
iv) LOCOMOTIVE PARTS	\$ 5.00 M
	\$ 1.00 M

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

i) Project Name: BARCELONA TRANSIT EXTENSION
Approximate Value: \$ 50 M
Financing Source: 023 EDC 012 DOM
For further info. please contact:
MACKENZIE TLX:27347 CHARLAND 995-6438

ii) Project Name: SEVILLE WORLD'S FAIR TRANSIT
Approximate Value: \$ 40 M
Financing Source: 023 EDC 012 DOM
For further info. please contact:
MACKENZIE TLX:27347 CHARLAND 995-6438

Export and Investment Promotion Planning System

MISSION: 407 MADRID

COUNTRY: 499 SPAIN

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

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

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

- the apparent limited sectoral capability in Canada compared to other competing export countries
- non-tariff protectionist measures which are difficult to overcome
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

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

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade missions
- use of Canadian Government export promotion activities
- Canada's position as one of the few major sources of international supply

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

Activity: CONTINUE TO COORDINATE MARKETING EFFORTS OF CANADIAN SUPPLIERS OF URBAN TRANSIT GOODS AND SERVICES WITH LOCAL PARTNERS.

Results Expected: SUBMISSION OF COMPETITIVE JOINT-VENTURE BIDS FOR URBAN TRANSIT REQUIREMENTS IN BARCELONA.

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

Activity: CALL ON MANAGEMENT OF NEW COMMUTER AIRLINES AS THEY ARE FORMED TO PROMOTE CDN. AIRCRAFT AND CONSULTING SERVICES AND EXPLAIN EDC FINANCING.

Results Expected: GENERATION OF A NUMBER OF REQUESTS FOR PROPOSALS.

Activity: CALL ON SEVILLE WORLD'S FAIR AND MUNICIPAL AUTHORITIES TO DISCUSS URBAN TRANSIT PLANS.

Results Expected: CLARIFICATION OF WHETHER OPPORTUNITIES EXIST FOR THE SALE OF CANADIAN CONSULTING SERVICES AND TECHNOLOGY.

Export and Investment Promotion Planning System

MISSION: 407 MADRID

COUNTRY: 499 SPAIN

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

Activity: ORGANIZE VISIT BY EDC REP TO BARCELONA AND SEVILLE TRANSIT AUTHORITIES, STATE RAILWAY AND COMMUTER AIRLINES.

Results Expected: EDUCATE PROSPECTIVE CLIENTS AS TO FINANCING AVAILABLE FOR MAJOR PURCHASE FROM CANADA.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 407 MADRID

Market: 499 SPAIN

Sector: 016 INDUSTRIAL MACHIN, PLANTS, SERV.

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	7300.00M	\$ 6600.00M	\$ 6000.00M	\$ 5377.00M
Canadian Exports \$	14.50M	\$ 13.10M	\$ 11.90M	\$ 10.70M
Canadian Share of Import Market	0.27%	0.24%	0.21%	0.20%

Major Competing Countries

Market Share

i) 128 GERMANY WEST	018 %
ii) 577 UNITED STATES OF AMERICA	012 %
iii) 112 FRANCE	011 %
iv) 237 ITALY	007 %
v) 051 UNITED KINGDOM	006 %
vi) 499 SPAIN	034 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) WASTE & WATER TREATMENT EQUIPMENT	\$ 0.00 M
ii) ROBOTICS & INDUSTRIAL AUTOMATION	\$ 0.00 M
iii) INDUSTRIAL HEAT PUMP SYSTEMS	\$ 121.90 M

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

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

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

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

Export and Investment Promotion Planning System

MISSION: 407 MADRID

COUNTRY: 499 SPAIN

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

- participation in trade missions
- use of provincial governments export promotion activities

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

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

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

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

Activity: ESTABLISH DIRECT CONTACT WITH MAJOR LOCAL COS. IN SECTOR TO INTRODUCE CDN EXPERTISE AND EQUIPMENT TO THEM.

Results Expected: STIMULATE ENOUGH INTEREST TO ARRANGE MARKET VISITS TO AND FROM CANADA AIMED AT INDUSTRIAL COOP AND TRANSFER OF TECHNOLOGY.

Activity: CONDUCT A MARKET SURVEY TO IDENTIFY SPECIFIC SUBSECTORS OFFERING MARKET OPPORTUNITIES FO CDN FIRMS. DISSEMINATE IT TO TRADE ASSOC. AND TRADE PUBLICATIONS.

Results Expected: ATTRACT 5 NEW CDN COMPANIES TO THE SPANISH MARKET.

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional Projects approved and planned for the coming fiscal year.		

Mission: 407 MADRID

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

020 MISSION OUTGOING FIRE & SECURITY MONITORING	MISSION TO SPAIN	0000
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Sector: 016 INDUSTRIAL MACHIN, PLANTS, SERV.

024 MISSION INCOMING BUYERS FROM MADRID TO CANADIAN MINING & INDUSTRIAL	SUDBURY	0487
BUYERS FM MADRID TO PROSPECTOR AND DEVELOPERS ASSOC	TORONTO	0487

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years:		

Mission: 407 MADRID

Sector: 002 FISHERIES, SEA PRODUCTS & SERV.

024 MISSION INCOMING INCOMING FISHERIES MISSION		0688
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Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

020 MISSION OUTGOING OUTGOING DEFENCE PRODUCTS MISSION TO COSMO 90	BARCELONA	0490
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024 MISSION INCOMING INCOMING DEFENCE PRODUCTS MISSION		0788
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Sector: 005 COMM. & INFORM. EQP. & SERV

010 FAIRS INFORMAT 89	BARCELONA	0489
INFORMAT/EXPOTRONICA 88	BARCELONA	0488
SIMO 89	MADRID	1189

Sector: 010 MINE, METAL, MINERAL PROD & SRV

024 MISSION INCOMING INCOMING MINING EQUIPMENT MISSION		0689
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Sector: 014 EDUCATION, MEDICAL, HEALTH PROD

010 FAIRS EXPO-GUIMIA	BARCELONA	1088
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Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 407 MADRID		
Sector: 017 SERVICE INDUSTRIES		
010 FAIRS		
FITUR 89	MADRID	0189
FITUR 90	MADRID	0190
Sector: 999 MULTIPLE SECTORS		
020 MISSION OUTGOING		
OUTGOING OLYMPICS 92/WORLD'S FAIR 92 MISSION	MADRID/BARC., SEVILLE	0688
024 MISSION INCOMING		
INCOMING TRANSFER OF TECHNOLOGY MISSION		1088

Export and Investment Promotion Planning System

87/88 Trade and Economic Overview

Mission: 409 BERNE

Country: 512 SWITZERLAND

CDA HAS A LONG STANDING POSITIVE RELATIONSHIP, BASED ON SOUND TRADE & ECON. RELATIONS, WITH SWITZERLAND. OUR TRADE IS HEALTHY, CDN EXPORTS C\$300M RANGE AND IMPORTS C\$500M RANGE; INVSTMT IS SIGNIFICANT, SWISS INVSTMT OF CDN\$1,100M IN CDA AND CDN INVSTMT OF C\$450M IN SWITZ (1984); CDN BORROWING ON THE SWISS CAPITAL MKT IS ABOUT C\$2B ANNUALLY; SOME 50 CDN FIRMS ARE ESTABLISHED IN SWITZ; AND OVER 50,000 SWISS VISIT CDA EACH YEAR. THERE IS NO MAJOR IRRITANT IN THE RELATIONS BETWEEN OUR TWO COUNTRIES, ALTHOUGH THE SWISS HAVE RESERVATIONS WITH RESPECT TO THE NEW CDN PATENT ACT, OUR POLICY ON BANKING RECIPROCITY, AND THEY ARE CONCERNED OVER THE DOME PETROLEUM SITUATION. A SMALL NATION IN TERMS OF GEOGRAPHY AND POPULATION, SWITZERLAND CONTINUES TO EXERCISE CONSIDERABLE INFLUENCE ON THE WORLD FINANCIAL SCENE. A VERITABLE ROCK OF POLITICAL AND ECON. STABILITY, THE COUNTRY ENJOYS THE HIGHEST STANDARD OF LIVING AMONG OECD MEMBERS, STRIKE-FREE LABOUR-MANAGEMENT RELATIONS, A GOVT BUDGET VIRTUALLY IN THE BLACK, LOW UNEMPLOYMENT (1%), STABLE PRICES (0.8% INFLATION), A BOP SURPLUS (US\$5.2B) AND ONE OF THE WORLD'S STRONGEST CURRENCIES. SWITZ IS A MAJOR EXPORTER OF CAPITAL, BOTH LOAN AND EQUITY. IN '85 SWITZ HAD THE SECOND HIGHEST GROWTH RATE (4%) IN WESTERN EUROPE (BASED ON STRONG EXPORT GROWTH OF 9%). IN 1986 THE ECON. SLOWED A BIT FOLLOWING APPRECIATION OF THE SWISS FRANC AGAINST THE DOLLAR, POUND STERLING AND DEUTSCHMARK AND MFTG ACTIVITY FELL 1%. HOWEVER, FUELLED BY STRONG CONSUMER DEMAND, A GROWTH RATE OF 2.6% IS EXPECTED FOR '86 AND '87. TOTAL SWISS IMPORTS EXCEEDED US\$28B AND MAJOR TRADING PARTNERS REMAIN WEST GERMANY (BY FAR), OTHER EEC COUNTRIES, AND THE USA. THE SWISS NAT'L BANK IS EXPECTED TO MAINTAIN ITS RESTRICTIVE MONETARY POLICY. IN THE PAST LYEAR POST INVOLVEMENT HAS INCLUDED THE ANNUAL DAVOS SYMPOSIUM, MINISTERIAL'S VISITS, SUCCESSFUL TOURISM EVENTS AT MONTREUX AND INTERLAKEN, PARTICIPATION AT TRADE EXHIBITIONS, AND PROMOTION OF PRODUCTS RANGING FROM FOODSTUFFS THROUGH SOFTWARE. PROMOTED CDN INVOLVEMENT IN CABLE TV PROJECTS IN BASLE AND GENEVA, SWISS CONSIDERATION OF FIBER OPTIC NETWORKS, AND SWISS PARTICIPATION IN EXPO '86. THE DEPRECIATION OF THE CDN\$ AGAINST THE SWISS FRANC SHOULD HELP BOOST CDN EXPORTS IN '87. WE SEE GOOD OPPORT. FOR COMPUTER HARDWARE AND SOFTWARE, WORD PROCESSORS AND SOPHISTICATED OFFICE EQUIPMENT; CONSUMER GOODS (APPAREL, SPORTING GOODS); SPECIALIZED INDUSTRIAL MACHINERY AND PROCESS CONTROL INSTRUMENTATION; COMMUNICATIONS EQUIPMENT; BIOMEDICAL EQUIPMENT, AND SPECIALIZED MILITARY HARDWARE. IN ALL CASES QUALITY PRODUCTS ARE ESSENTIAL TO BE SUCCESSFUL IN THE SWISS MARKET. PRIORITY WILL BE GIVEN TO SEEKING NEW INVESTMENT, JOINT VENTURES AND TECHNOLOGY EXCHANGES.

Export and Investment Promotion Planning System

REPT: SYN-GEO 87/88 A. Post export program priorities

Region: WESTERN EUROPE

Mission: 409 BERNE

Market: 512 SWITZERLAND

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

1. 013 CONSUMER PRODUCTS

REASONS: SWITZERLAND HAS HIGHEST PER CAPITAL INCOME I OECD-STABLE CURRENCY, STRONG PURCHASING POWER; SUPERB TEST MARKET FOR W. EUROPE - GOOD ECONOMIC GROWTH I PROSPECT; NO UNEMPLOYMENT OR INFLATION.

2. 001 AGRI & FOOD PRODUCTS & SERVICE

REASONS: -AS PER CONSUMER PRODUCTS - WEAKER CANADIAN DOLLAR HAS MARKEDLY IMPROVED COMPETITIVENESS - EASY TO IDENTIFY DISTRIBUTION CHANNELS OPEN TO NEW SPECIALTY PRODUCTS

3. 005 COMM. & INFORM. EGP. & SERV

REASONS: -STRONG GROWTH SECTOR - SPECIALIZED BUT MODEST DOMESTIC MANUFACTURING BASE - PROVEN NORTH AMERICAN MARKET PENETRATION FOR SELECTED ITEMS

4. 004 DEFENCE PROGRAMS, PRODUCTS, SERV

REASONS: -HIGH PER CAPITA SPENDING ON DEFENCE - EXPANDING INDUSTRIAL COOPERATION LINKS BETWEEN CDA AND SWITZERLAND - SWITZERLAND DEPENDANT ON IMPORTS FOR SELECTED SPECIALIZED EQUIPMENT

5. 002 FISHERIES, SEA PRODUCTS & SERV.

REASONS: AS PER CONSUMER PRODUCTS. EXPANDING CONSUMPTION OF FISH PRODS IN SWITZERLAND. DESIRE TO DIVERSIFY SOURCES FOR PRODS BY SWISS WHOLESALERS. WEAKER CANADIAN DOLLAR HAS MARKEDLY IMPROVED COMPETITIVENESS.

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

1. 010 MINE, METAL, MINERAL PROD & SRV
2. 012 PETROCHEM & CHEM PROD, EGP, SERV
3. 009 FOREST PRODUCTS, EQUIP, SERVICES

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 409 BERNE

Market: 512 SWITZERLAND

Sector: 001 AGRI & FOOD PRODUCTS & SERVICE

Subsector: 012 HORTICULTURE (FRUIT, VEG, FLOR)

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1155.00M	\$ 1111.00M	\$ 855.00M	\$ 816.00M
Canadian Exports \$	0.75M	\$ 0.73M	\$ 0.67M.	\$ 0.73M
Canadian Share of Import Market	0.06%	0.06%	0.07%	0.08%

Major Competing Countries

	Market Share
i) 237 ITALY	020 %
ii) 499 SPAIN	013 %
iii) 112 FRANCE	010 %
iv) 232 ISRAEL	003 %
v) 128 GERMANY WEST	002 %

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

Current status of Canadian exports: Market share declining

Products/services for which there are good market prospects

	Current Total Imports In Canadian \$
i) VEGETABLES, RAW	\$ 0.00 M
ii) VEG. MATERIAL	\$ 255.00 M
iii) FRUIT	\$ 421.00 M
iv) PREP OF VEG AND FRUITS	\$ 158.00 M
v) BLUEBERRIES	\$ 1.45 M

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

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

Export and Investment Promotion Planning System

MISSION: 409 BERNE

COUNTRY: 512 SWITZERLAND

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

- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- other factor(s) described by the Trade Office as follows:
QUALITY REQUIREMENTS ARE NOT ALWAYS MET (E. G. MUSHROOMS - DIFFERENCES IN SIZES)

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

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

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

Activity: TO PARTICIPATE AT IGEHO '87 (LARGEST SWISS FOOD SHOW) WITH A CDN BOOTH PUTTING EMPHASIS ON FROZEN VEGETABLES AND FRUITS, SEMI PROCESSED FOOD.

Results Expected: TO INCREASE CDA'S MARKET SHARE.

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

Activity: INVESTIGATE TREND IN SUBSECTORS AND REPORT TO CDN SUPPLIERS.

Results Expected: TO GENERATE REPORTS ON OPPORTUNITIES OR NON- OPPORTUNITIES OF SUBSECTOR.

Activity: INVESTIGATE INCREASE OF CONSUMPTION OF FROZEN VEGETABLES AND FRUITS (VALUED ADDED PRODUCTS)

Results Expected: TO IDENTIFY POTENTIAL FOR CDN FROZEN VEGETABLES AND NOTIFY CDN PRODUCERS.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 409 BERNE

Market: 512 SWITZERLAND

Sector: 002 FISHERIES, SEA PRODUCTS & SERV.

Subsector: 021 FISH & SHELLFISH & OTHER PROD

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	270.00M	\$ 266.00M	\$ 204.70M	\$ 203.70M
Canadian Exports \$	10.30M	\$ 9.80M	\$ 9.50M	\$ 9.40M
Canadian Share of Import Market	3.80%	3.60%	4.60%	4.60%

Major Competing Countries

Market Share

i) 093 DENMARK	17. %
ii) 354 NETHERLANDS	8. %
iii) 410 NORWAY	5. %

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

Current status of Canadian exports: Mature with little growth

Products/services for which there are
good market prospects

Current Total Imports

	In Canadian \$
i) SALMON	\$ 0.00 M
ii) YELLOW PERCH	\$ 0.00 M
iii) SHRIMPS	\$ 0.00 M
iv) COD	\$ 0.00 M
v) LOBSTER	\$ 0.00 M
vi) PIKE	\$ 0.00 M
vii) GROUND FISH	\$ 0.00 M

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

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

Export and Investment Promotion Planning System

MISSION: 409 BERNE

COUNTRY: 512 SWITZERLAND

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

- non competitive pricing
- other factor(s) described by the Trade Office as follows:
DIFFICULTY TO OBTAIN PRE-PACKAGED FISH WITH LABEL IN THREE
LANGUAGES CDN SPECIES OFTEN UNKNOWN IN SWITZERLAND RECENT RUMOURS
RE "FISH CONTAMINATION" IN LAKE ONTARIO

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

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

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

Activity: TO INTRODUCE NEW SPECIES TO IMPORTERS SUCH AS PIKE, WHITEFISH, WALLEYS, INCONNU ETC.. (FOR RESTAURANT MARKET)

Results Expected: CHANGE CONSUMER HABITS

Activity: TO TRY TO OBTAIN PROMOTION PRICES FOR IMPORTERS IN ORDER TO PUSH SPECIES WHERE SUPPLY ABUNDANT OR PRICES ARE LOW

Results Expected: TO DEVELOP INTEREST AMONG RESTAURATEURS

Activity: TO DISTRIBUTE POSTERS AND CONSUMER PROMOTIONAL BROCHURES ON CDN FISH FOR DISTRIBUTION AT RETAIL OUTLETS

Results Expected: TO INCREASE VISIBILITY ON CDN PRODUCTS BEFORE SWISS CONSUMERS

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 409 BERNE

Market: 512 SWITZERLAND

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	0.00M NA	\$ 0.00M NA	\$ 400.00M	\$ 140.00M
Canadian Exports \$	15.00M	\$ 15.00M	\$ 0.00M NA	\$ 0.00M NA
Canadian Share of Import Market	0.00% NA	0.00% NA	0.00% NA	0.00% NA

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	085 % *
ii) 112 FRANCE	%
iii) 128 GERMANY WEST	%

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) AIRCRAFT ENGINES	\$ 0.00 M
ii) NBC MATERIAL	\$ 0.00 M
iii) FLIGHT SIMULATORS	\$ 0.00 M
iv) JET THRUST TEST SYST.	\$ 0.00 M
v) SECURITY EQPMT	\$ 0.00 M
vi) RPV	\$ 0.00 M
vii) GUN ALIGNMENT/CONTROL	\$ 0.00 M

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

i) Project Name: REMOTELY-PILOTED VEHICLE
Approximate Value: \$ M
Financing Source:
For further info. please contact:

Export and Investment Promotion Planning System

MISSION: 409 BERNE

COUNTRY: 512 SWITZERLAND

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

- there are import restrictions which can present significant problems
- exports of certain products or services to this country are subject to Canadian export controls
- the degree of import duty protection of local industry tends to be high
- approval of technical standards can present problems in the case of some imported products

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

- a lack of interest in the market on the part of Canadian exporters
- the apparent limited sectoral capability in Canada compared to other competing export countries
- non-tariff protectionist measures which are difficult to overcome

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

- aggressive marketing on the part of Canadian Exporters

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

Activity: WORK HAND-INGLOVE WITH NUMEROUS CANADIAN FIRMS WHICH HAVE INDICATED AN INTEREST IN SWISS DEFENCE MARKET (CAE, ANACHEMIA, COMDEV, BENDIX, CANADAIR, ETC.)

Results Expected: CANADIAN FIRMS INVITED TO TENDER ON GRD REQUIREMENTS

Activity: ASSIST DND IN NEGOTIATION OF BILATERAL MOU ON QUALITY ASSURANCE WITH SWISS DEFENCE TECHNOLOGY & PROCUREMENT AGENCY; ENCOURAGE GRD TO VISIT CANADA YEARLY

Results Expected: MOU IN PLACE FOR LLAD PROGRAMME

Activity: MAINTAIN CLOSE CONTACT WITH OERLIKON BUEHRLE MILITARY PRODUCTS AND PILATUS AIRCRAFT IN THEIR ENDEAVOURS TO SEEK INDUSTRIAL PARTNERS IN CANADA

Results Expected: SUB CONTRACTS FOR CANADIAN SUPPLIERS ON LLAD

Export and Investment Promotion Planning System

MISSION: 409 BERNE

COUNTRY: 512 SWITZERLAND

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

Activity: ATTEND HITEC 87 AND PARIS AIR SHOW JUNE 87 TO MEET CANADIAN EXPORTERS AND EXHIBITORS-INTRODUCE NEW CANADIAN SUPPLIERS TO SWISS MARKET.

Results Expected: NEW REPS/CONTACTS FOR CANADIAN INDUSTRY IN SWITZERLAND.

Activity: LIAISE CLOSELY WITH CFA ON A COORDINATED MARKET INTELLIGENCE AND PROMOTIONAL PROGRAMME INCLUDING VISITS TO GRD AND SWISS INDUSTRY.

Results Expected: BETTER RECIPROCAL KNOWLEDGE OF SWISS MARKET & CANADIAN CAPABILITIES.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 409 BERNE

Market: 512 SWITZERLAND

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

Subsector: 052 WORKPLACE AUTOMATION

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	45.90M	\$ 44.50M	\$ 41.80M	\$ 23.40M
Canadian Exports \$	14.00M	\$ 13.20M	\$ 11.40M	\$ 8.10M
Canadian Share of Import Market	30.50%	29.60%	27.30%	34.60%

Major Competing Countries

Market Share

i) 265 JAPAN	10. %
ii) 128 GERMANY WEST	006 %
iii) 434 TAIWAN	003 %
iv) 577 UNITED STATES OF AMERICA	2.0 %

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

Current status of Canadian exports:

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) CASH REGISTERS	\$ 19.30 M
ii) TYPEWRITERS INCORP. CALCUL	\$ 1.60 M
iii) CALCULATORS	\$ 20.10 M

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

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

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

- No factors reported by mission

Export and Investment Promotion Planning System

MISSION: 409 BERNE

COUNTRY: 512 SWITZERLAND

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

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- competitive export pricing for this market
- strong sectoral capability in Canada

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

Activity: OBTAIN INFORMATION ON CURRENT MARKET AND ASCERTAIN NEEDS OF SWISS SUPPLIERS OF OFFICE EQUIPMENT AND REPORT TO CDN. SUPPLIERS.

Results Expected: INCREASE CDN. SUPPLIER VISITS

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

Activity: ALERT COMPANIES ACTIVE IN THE OFFICE EQUIPMENT SECTOR OF CANADIAN PARTICIPATION IN EUROPEAN FAIRS.

Results Expected: INCREASE AWARENESS OF CDN. CAPABILITY.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 409 BERNE

Market: 512 SWITZERLAND

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

Subsector: 053 TELECOMMUNICATIONS (INC SPACE)

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	150.00M	\$ 140.00M	\$ 96.85M	\$ 51.51M
Canadian Exports \$	1.50M	\$ 1.50M	\$ 0.44M	\$ 1.21M
Canadian Share of Import Market	1.00%	1.00%	0.46%	2.36%

Major Competing Countries

Market Share

i) 128 GERMANY WEST	018 %
ii) 577 UNITED STATES OF AMERICA	015 %
iii) 224 IRELAND	010 %
iv) 265 JAPAN	009 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) ISDN EQUIPMENT	\$ 0.00 M
ii) FIBER OPTIC TECHNOLOGY INSTRUMENTS	\$ 0.00 M
iii) SATELLITE TECHNOLOGY RELATED SERVICES	\$ 0.00 M
iv) HOME TELEPHONE EQUIPMENT	\$ 0.00 M

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

i) Project Name: SWISSNET(FIBRE OPTIC TELECOM.NETWORK)
ISDN,DIGITAL SWITCHING STATIONS

Approximate Value: \$ 1300.0 M

Financing Source: 012 DOM

For further info. please contact:

CDN EMBASSY, BERNE, SWITZERLAND

Export and Investment Promotion Planning System

MISSION: 409 BERNE

COUNTRY: 512 SWITZERLAND

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

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

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

- high tariffs
- non-tariff protectionist measures which are difficult to overcome
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters
- other factor(s) described by the Trade Office as follows:
IMPORTS FROM EFTA AND EEC COUNTRIES ARE DUTY FREE
SWISS PTT PREFER BUYING PRODUCTS AVAILABLE LOCALLY.

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

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

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

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

Activity: TO FOLLOW UP WITH SWISS PTT RE THEIR VISIT TO CDA IN ORDER TO DRAW ATTENTION ON CDN CAPABILITY IN TELECOMMUNICATION PRODUCTS AND CDN CATV TECHNOLOGY

Results Expected: TO DEVELOP KNOWLEDGE AND INTEREST IN CDN TECHNOLOGY AND PRODUCTS AND GENERATE SALES.

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

Activity: TO DEVELOP A CLOSE RELATIONSHIP WITH MAJOR SWISS TELECOMMUNICATION FIRMS, HASLER, AUTOPHON, GFELLER, HELVECOM, ASSOC SUISSE DES TELERESEAUX

Results Expected: TO GENERATE INTEREST IN CDN ELECTRONIC COMPONENTS AND CDN TECHNOLOGY TO ASSESS POTENTIAL FOR TECHNOLOGY TRANSFER.

Export and Investment Promotion Planning System

MISSION: 409 BERNE

COUNTRY: 512 SWITZERLAND

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

Activity: PROMOTE CDN TELECOM. TECHNOLOGY & GENERATE INTEREST IN ORDER TO BRING TOGETHER CDN SUPPLIERS(ATTENDING TELECOM '87 & THE MONTREUX TV SYMPOSIUM '87) AND SWISS KEY DECISION MAKERS IN CHARGE OF SELECTING EQUIPMENT FOR SWITZERLAND

Results Expected: TO INCREASE CDN SHARE OF IMPORTED TELECOM. PRODUCTS

Activity: MONITOR TO INFORM THE CDN INDUSTRY ON COMMERCIAL OPPORTUNITIES REF: PLANNED MULTIBILLION SFR FIBRE OPTIC NETWORK FOR THE SWISS PTT, AND THE DEVELOPING INTEREST IN HOME SATELLITE TV RECEIVING EQUIPMENT.

Results Expected: TO INCREASE VISIBILITY FOR ADVANCED CDN TELECOM. PRODUCTS.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 409 BERNE

Market: 512 SWITZERLAND

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

Subsector: 054 COMPUTERS, SOFTWARE & SYSTEMS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1650.00M	\$ 1450.00M	\$ 967.50M	\$ 730.70M
Canadian Exports \$	20.00M	\$ 15.00M	\$ 12.67M	\$ 11.02M
Canadian Share of Import Market	1.20%	1.03%	1.30%	1.50%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	30 %
ii) 128 GERMANY WEST	22 %
iii) 051 UNITED KINGDOM	020 %
iv) 224 IRELAND	007 %
v) 265 JAPAN	005 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) SOFTWARE ENGLISH/FRENCH	\$ 0.00 M
ii) COMPUTER PERIPHERALS	\$ 0.00 M
iii) EDUCATIONAL SOFT. FRENCH	\$ 0.00 M
iv) WORD PROCESSING EQUIP.	\$ 0.00 M
v) PLANT PRODUCTION MONITORING SYSTEMS	\$ 0.00 M
vi) SPECIALTY SOFT. FOR PROFESSIONAL (IE MEDICAL)	\$ 0.00 M
vii) OFFICE AUTOMATION	\$ 0.00 M
viii) SOFT FOR INDUSTRIES	\$ 0.00 M

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

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

Export and Investment Promotion Planning System

MISSION: 409 BERNE

COUNTRY: 512 SWITZERLAND

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

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

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

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

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

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

Activity: USE OF LOCAL SPECIALIZED MAGAZINES TO INTRODUCE NEW CDN PRODUCTS (FREE PRODUCTS INTRODUCTION ARTICLES OFFERED BY MANY PUBLISHERS CONTACTED)

Results Expected: TO BRING MORE VISIBILITY ON CDN PRODUCTS TO INCREASE EXPORTS

Activity: VISIT LOCAL REGIONAL FAIRS IN ORDER TO IDENTIFY NEW LOCAL DISTRIBUTORS AND DRAW ATTENTION TO CDN PRODUCTS THROUGH PARTICIPATION AT COMPUTER 87 LAUSANNE.

Results Expected: TO INCREASE CDN SHARE OF THE MARKET.

Activity: AUTOMATION OF OUR REFERENCE SYSTEM (RE SPECIALIZED SOFTWARE DISTRIBUTORS)

Results Expected: TO PROVIDE MORE PRECISE INFO TO DISTRIBUTORS AND TO DO DIRECT AGGRESSIVE MARKETING RE PROMISING PRODUCTS

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 409 BERNE

Market: 512 SWITZERLAND

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

Subsector: 055 BROADCASTING (INC CATV)

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	600.00M	\$ 564.00M	\$ 434.82M	\$ 396.67M
Canadian Exports \$	2.50M	\$ 2.00M	\$ 1.40M	\$ 0.44M
Canadian Share of Import Market	0.41%	0.35%	0.32%	0.11%

Major Competing Countries	Market Share
i) 128 GERMANY WEST	29. %
ii) 265 JAPAN	20. %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) INDUSTRIAL CATV EQUIPMENT	\$ 0.00 M
ii) INTERACTIVE TV SYSTEM	\$ 0.00 M
iii) CATV NETWORK COMPONENTS	\$ 0.00 M
iv) HOME TV DISHES AND RELATED EQUIPMENT	\$ 0.00 M
v) INDUSTRIAL TV EQUIPMENT	\$ 0.00 M

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

- i) Project Name: GENEVA TV CABLE PROJECT
Approximate Value: \$ 28 M
Financing Source: 012 DOM
For further info. please contact:
BERNE, CDN EMBASSY TLX 45-911308
- ii) Project Name: BASLE TV CABLE PROJECT
Approximate Value: \$ 30 M
Financing Source: 012 DOM
For further info. please contact:
BERNE, CDN EMBASSY TLX 45-911308

Export and Investment Promotion Planning System

MISSION: 409 BERNE

COUNTRY: 512 SWITZERLAND

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

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

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

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters
- other factor(s) described by the Trade Office as follows:
SWISS BUYERS TEND TO BUY SWISS FIRST LENGTHY + COMPLEX PROCESS &
DEBATE AMONG PTT, CANTONS + PRIVATE INDUSTRY TO CHANGE REGULATORY
FRAMEWORK.

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

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

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

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

Activity: OBTAIN TENDER INFORMATION FOR GENEVA CABLE PROJECTS, FOLLOW-UP WITH CDN COS RE EQUIPMENT REQUIREMENTS.

Results Expected: TO POSITION CDN COS FAVOURABLY AND GENERATE PRODUCTS AND SERVICES SALES.

Activity: OBTAIN DETAILS RE BASLE CABLE PROJECT

Results Expected: TO INCREASE CHANCES FOR CDN COS TO SELL TECHNOLOGY SERVICES & PRODS.

Export and Investment Promotion Planning System

MISSION: 409 BERNE

COUNTRY: 512 SWITZERLAND

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

Activity: TO FOLLOW UP WITH SWISS PTT RE THEIR VISIT TO CDA, DRAW ATTENTION TO CDN CAPABILITY IN INDUSTRIAL CABLE TV EQUIPMENT, TV DISHES AND RELATED EQUIPMENT.

Results Expected: TO DEVELOP KNOWLEDGE AND INTEREST IN CDN TECHNOLOGY AND PRODUCTS

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

Activity: TO DEVELOP A CLOSE RELATIONSHIP WITH THE MOST IMPORTANT OF THE 2200 CABLE TV OWNERS AND THEIR ASSOCIATIONS.

Results Expected: TO GIVE CDN PRODUCT/TECHNOLOGY A HIGHER VISIBILITY AND CREATE INTEREST IN CDN PRODUCTS.

Activity: TO INCREASE CONTACTS WITH SWISS PTT OFFICIALS.

Results Expected: TO OBTAIN INFO. ON THE NEW TELECOMMUNICATION LAW WHICH WILL BE ENACTED AROUND 1988/89 (REGARDING INTERACTIVE TV SERVICES)

Activity: TO VISIT LOCAL FAIRS TO KNOW BETTER POTENTIAL OF DISTRIBUTORS, INTEREST AND CAPABILITIES.

Results Expected: TO MAKE BETTER RECOMMENDATIONS TO CDN EXPORTERS.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 409 BERNE

Market: 512 SWITZERLAND

Sector: 006 ELECTRONICS EQUIP. & SERV

Subsector: 061 PRODUCTS & COMPONENTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	363.00M	\$ 343.00M	\$ 264.20M	\$ 239.15M
Canadian Exports \$	6.00M	\$ 5.00M	\$ 3.93M	\$ 3.64M
Canadian Share of Import Market	1.65%	1.45%	1.49%	1.53%

Major Competing Countries

Market Share

- i) 128 GERMANY WEST 028 %
- ii) 577 UNITED STATES OF AMERICA 018 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) LED	\$ 0.00 M
ii) ELECTRONIC VALVES	\$ 0.00 M
iii) RESISTORS	\$ 0.00 M
iv) POTENTIO METERS	\$ 0.00 M
v) CRYSTALS	\$ 0.00 M
vi) SEMI-CONDUCTORS	\$ 0.00 M

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

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

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

- non competitive pricing
- other factor(s) described by the Trade Office as follows:
 - IMPORTS FROM EFTA AND EEC COUNTRIES ARE DUTY FREE
 - STRONG SECTORIAL CAPABILITY IN SWITZERLAND WITH LARGE EXPORTS TO VARIOUS COUNTRIES.

Export and Investment Promotion Planning System

MISSION: 409 BERNE

COUNTRY: 512 SWITZERLAND

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

- competitive export pricing for this market

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

Activity: ASSIST CANADIAN BUSINESSMEN IN PLANNING THEIR VISITS IN SWITZERLAND.

Results Expected: EFFORTS SHOULD CONCLUDE IN ESTABLISHING NEW BUYING CONNECTIONS/AGENCIES.

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

Activity: TO VISIT LOCAL TRADE FAIRS IN ORDER TO DEVELOP DETAILED INFORMATION ON ABOVE SUB-SECTOR.

Results Expected: TO IDENTIFY BUSINESS OPPORTUNITIES TO BE REFERRED TO CANADIAN SUPPLIERS.

Activity: TO IDENTIFY AND VISIT HEAD OF PURCHASING DEPARTMENT OF MAJOR ELECTRONIC PRODUCTS MANUFACTURERS.

Results Expected: TO SUPPLY MARKET INFO TO CANADIAN MANUFACTURERS/EXPORTERS.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 409 BERNE

Market: 512 SWITZERLAND

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

Subsector: 085 AEROSPACE

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	0.00M NA	\$ 770.00M	\$ 450.00M	\$ 490.00M
Canadian Exports \$	0.00M NA	\$ 15.00M	\$ 5.00M	\$ 15.00M
Canadian Share of Import Market	0.00% NA	0.20%	0.10%	0.30%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	40 %
ii) 112 FRANCE	40 %
iii) 507 SWEDEN	9 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) AIRCRAFT ENGINES	\$ 0.00 M
ii) FLIGHT SIMULATORS	\$ 0.00 M
iii) AEROSPACE COMPONENTS	\$ 0.00 M
iv) PASSENGER AIRCRAFT	\$ 0.00 M
v) AIR TRAFFIC CONTROL EQ.	\$ 0.00 M

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

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

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

MARKET SUCCESS OR LACK THEREOF HAS PRIMARILY BEEN ONE OF TIMING;
GOOD PROSPECTS EXIST FOR FUTURE SALES AND CANADIAN SUPPLIERS ARE
ACTUALLY PURSUING THEM.

Export and Investment Promotion Planning System

MISSION: 409 BERNE

COUNTRY: 512 SWITZERLAND

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

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

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

Activity: GIVE STRONG ON-THE-GROUND AND FOLLOW-UP SUPPORT TO CANADIAN FIRMS RESPONDING TO SWISS RFQ'S (CAE; CANADAIR; COMDEV; ETC.)

Results Expected: MAINTAIN POSITIVE ATTITUDE OF SWISS TO CDN BIDS FOR KEY EQUIPMENT.

Activity: INVESTIGATE POTENTIAL FOR SALE OF SECOND CANADAIR CHALLENGER AS AIR AMBULANCE; SUPPORT NEW DE HAVILLAND DASH 8 REP AND CANADAIR BOMBER REP.

Results Expected: INCREASED AWARENESS OF CANADIAN CAPABILITIES.

Activity: ASSIST PILATUS AIRCRAFT IN LOCATING AEROSPACE PARTNER IN CANADA FOR POSSIBLE LICENSING/JV/ASSEMBLY PROJECT FOR PC-9 TURBO TRAINER

Results Expected: ESTABLISHMENT OF BUSINESS CONNECTION FOR PC-9 AIRCRAFT.

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

Activity: ATTEND HITEC 88 IN OTTAWA TO MEET WITH POTENTIAL EXPORTERS.

Results Expected: 40-60 CONTACTS WITH CANADIAN INDUSTRY.

Activity: PROMOTE SWISS ATTENDANCE AT PARIS AIR SHOW 87; VISIT FAIR TO MEET CANADIAN EXHIBITORS.

Results Expected: ATTENDANCE OF 10-12 SWISS COMPANIES AT PARIS AIR SHOW.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 409 BERNE

Market: 512 SWITZERLAND

Sector: 009 FOREST PRODUCTS, EQUIP, SERVICES

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	2600.00M	\$ 2400.00M	\$ 2175.00M	\$ 1960.00M
Canadian Exports \$	43.00M	\$ 38.00M	\$ 34.20M	\$ 34.60M
Canadian Share of Import Market	1.70%	1.60%	1.60%	1.80%

Major Competing Countries

Market Share

i) 128 GERMANY WEST	020 %
ii) 112 FRANCE	011 %
iii) 026 AUSTRIA	008 %
iv) 504 FINLAND	006 %
v) 507 SWEDEN	005 %

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

Current status of Canadian exports: Mature with little growth

Products/services for which there are good market prospects

Current Total Imports
In Canadian \$

i) PULP	\$ 27.20 M
ii) LUMBER	\$ 6.80 M
iii) PLYWOOD	\$ 0.50 M

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

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

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

- non competitive pricing
- high tariffs
- other factor(s) described by the Trade Office as follows:

IT IS DIFFICULT FOR CANADIAN SUPPLIERS TO COMPETE IN THIS MARKET DUE TO PROXIMITY OF EEC/EFTA SUPPLIERS & PREFERENTIAL TARIFF TREATMENT ACCORDED THEM.

Export and Investment Promotion Planning System

MISSION: 409 BERNE

COUNTRY: 512 SWITZERLAND

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

- aggressive marketing on the part of Canadian Exporters
- strong sectoral capability in Canada

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

Activity: APPROACH SWISS CUSTOMS AUTHORITIES IN ORDER TO CLARIFY THE CLASSIFICATION OF FINGER-JOINTED TIMBER IN SWISS SCHEDULE.

Results Expected: PROVIDE DATA TO INDUSTRY + OTTAWA.

Activity: VISIT SOME IMPORTANT USERS OF PULP IN SWITZERLAND

Results Expected: PROMOTE CANADIAN PULP

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 409 BERNE

Market: 512 SWITZERLAND

Sector: 013 CONSUMER PRODUCTS

Subsector: 131 APPAREL (CLOTH, FUR, SHOES) TEXT

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	128.80M	\$ 123.20M	\$ 116.10M	\$ 96.80M
Canadian Exports \$	11.20M	\$ 10.00M	\$ 9.00M	\$ 9.90M
Canadian Share of Import Market	8.70%	8.10%	7.80%	10.20%

Major Competing Countries

Market Share

i) 128 GERMANY WEST	026 %
ii) 159 GREECE	012 %
iii) 237 ITALY	010 %
iv) 577 UNITED STATES OF AMERICA	009 %
v) 112 FRANCE	7. %

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

Current status of Canadian exports: Well established and growing

Products/services for which there are
good market prospects

Current Total Imports

i) FUR GARMENTS	\$ 70.20 M
ii) FUR SKINS, RAW	\$ 15.70 M

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

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

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

- other factor(s) described by the Trade Office as follows:

EXPORTS OF FUR GOODS HAVE SUFFERED IN RECENT YEARS AS A RESULT OF
ANTI-FUR CAMPAIGNS IN SWITZERLAND

Export and Investment Promotion Planning System

MISSION: 409 BERNE

COUNTRY: 512 SWITZERLAND

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

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

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

Activity: RECRUIT BUYERS TO VISIT 1987 INTL. FUR FAIR, MONTREAL.

Results Expected: APPROX. C\$ 2 MILLIONS.

Activity: PROMOTE 1987 IFF MTL. THROUGH PREFAIR MAILING CAMPAIGN CONSISTING OF PERSONAL LETTER, PRESS RELEASE AND QUESTIONNAIRE TO SOME 250 SWISS FURRIERS.

Results Expected: GENERATE INCREASED INTEREST AND NUMBER OF VISITORS TO IFF MONTREAL.

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

Activity: PRE-FAIR CAMPAIGN AND SELECTION OF BUYERS TO VISIT 1988 FAIR.

Results Expected: APPROX. C\$2.4

Activity: CALL ON FUR INDUSTRY IN MAJOR SWISS CITIES AND ASCERTAIN NEEDS FOR INCREASED FUR SHOWS BY CDN. MANUFACTURERS IN SWITZ.

Results Expected: PREPARE REPORT AND SEND TO ACTIVE CDN. EXPORTERS.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 409 BERNE

Market: 512 SWITZERLAND

Sector: 013 CONSUMER PRODUCTS

Subsector: 134 LEISURE PROD. TOOLS HARDWARE

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	123.20M	\$ 115.90M	\$ 109.30M	\$ 101.30M
Canadian Exports \$	1.12M	\$ 1.01M	\$ 0.67M	\$ 0.84M
Canadian Share of Import Market	0.91%	0.87%	0.61%	0.83%

Major Competing Countries

Market Share

i) 128 GERMANY WEST	031 %
ii) 026 AUSTRIA	025 %
iii) 112 FRANCE	018 %
iv) 577 UNITED STATES OF AMERICA	007 %
v) 237 ITALY	006 %
vi) 434 TAIWAN	005 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are
good market prospects

Current Total Imports

In Canadian \$

i) ICE HOCKEY BOOTS + SKATES

\$ 3.00 M

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

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

- No factors reported by mission

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

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

Export and Investment Promotion Planning System

MISSION: 409 BERNE

COUNTRY: 512 SWITZERLAND

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

Activity: RECRUITING OF BUYER TO VISIT CSGA FAIR MONTREAL.

Results Expected: NEW OUTLETS FOR 2 OR 3 CANADIAN SUPPLIERS.

Activity: LARGE SCALE ISPO PRE-FAIR MAILING TO SOME 300 SPORTING GOODS BUYERS.

Results Expected: 3-4 NEW AGENCIES.

Activity: ENCOURAGE SUPPLIERS TO UNDERTAKE PERSONAL VISITS TO SWISS SPORTING GOODS INDUSTRY AND TO PARTICIPATE IN A MAJOR SWISS SPORTING GOODS FAIR.

Results Expected: BETTER PENETRATION OF SWISS MARKET.

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

Activity: CALLS ON SPORTING GOODS INDUSTRY TO ASCERTAIN INTEREST IN VISITING EITHER WINTER OR SUMMER CSGA FAIR IN MONTREAL.

Results Expected: INCREASED AWARENESS OF CANADIAN SUPPLIES AVAILABLE.

Activity: RECRUIT SPORTING GOODS BUYERS TO VISIT ONE OF CSGA FAIRS (WINTER OR SUMMER).

Results Expected: 2 TO 3 NEW OUTLETS.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 409 BERNE

Market: 512 SWITZERLAND

Sector: 014 EDUCATION, MEDICAL, HEALTH PROD

Subsector: 142 HOSP. & MEDICAL EQUIP, INSTRUM.

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	255.00M	\$ 252.00M	\$ 247.50M	\$ 219.80M
Canadian Exports \$	0.62M	\$ 0.39M	\$ 0.37M	\$ 0.86M
Canadian Share of Import Market	0.24%	0.15%	0.15%	0.39%

Major Competing Countries

Market Share

i) 128 GERMANY WEST	038 %
ii) 577 UNITED STATES OF AMERICA	020 %
iii) 265 JAPAN	007 %
iv) 354 NETHERLANDS	007 %
v) 112 FRANCE	007 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) ELECTROMED. APP. + INSTR.	\$ 41.20 M
ii) ORTHOPAEDIC & AIDS TO HANDICAPPED	\$ 35.90 M

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

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

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

- non competitive pricing
- the apparent limited sectoral capability in Canada compared to other competing export countries

Export and Investment Promotion Planning System

MISSION: 409 BERNE

COUNTRY: 512 SWITZERLAND

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

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

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

Activity: VISIT IFAS MEDICAL/HOSP. FAIR TO BRING CDN. EXHIBITORS IN TOUCH WITH SWISS AGENTS AND TO COLLECT DATA WITH A VIEW TO A CDN. PARTICIPATION (INFO BOOTH/CATALOGUE SHOW) IN THE NEXT IFAS IN 1988.

Results Expected: 2 TO 3 NEW AGENCIES.

Activity: IDENTIFY NEW OUTLETS BY APPROACHING SOME 250 COMPANIES ACTIVE IN THIS SECTOR. MAILING OF BROCHURE "MEDICAL TECHNOLOGY: CANADA'S EXPERIENCE".

Results Expected: DEVELOP CLOSE CONTACT WITH SWISS COS. AND INCREASE NO. OF OUTLETS FOR CDN. PRODUCTS.

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

Activity: ORGANIZE INFO BOOTH/CATALOGUE SHOW AT IFAS 1988.

Results Expected: GENERATE INCREASED INTEREST AND AWARENESS OF CDN. CAPABILITY IN THIS SECTOR.

Activity: PREPARE MARKET REPORT AND ENCOURAGE CDN. SUPPLIER VISITS.

Results Expected: INCREASE NUMBER OF AGENTS REPRESENTING CDN. SUPPLIERS BY 5.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 409 BERNE

Market: 512 SWITZERLAND

Sector: 016 INDUSTRIAL MACHIN, PLANTS, SERV.

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	5800.00M	\$ 5300.00M	\$ 4820.00M	\$ 3997.00M
Canadian Exports \$	35.00M	\$ 31.00M	\$ 28.20M	\$ 30.30M
Canadian Share of Import Market	0.61%	0.58%	0.58%	0.76%

Major Competing Countries

Market Share

i) 128 GERMANY WEST	022 %
ii) 237 ITALY	012 %
iii) 112 FRANCE	011 %
iv) 026 AUSTRIA	007 %
v) 606 BENELUX COUNTRIES	005 %

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

Current status of Canadian exports: Mature with little growth

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) TOOLS	\$ 0.00 M
ii) SPECIAL MACHINERY	\$ 0.00 M

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

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

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

- non competitive pricing
- high tariffs
- other factor(s) described by the Trade Office as follows:

CANADIAN MARKETING IS SOMETIMES NOT AGGRESSIVE ENOUGH, CANADIAN COMPANIES SHOULD SEEK COOPERATION WITH SWISS FIRMS (JOINT VENTURES ETC.) RATHER THAN SELLING FROM CANADA.

Export and Investment Promotion Planning System

MISSION: 409 BERNE

COUNTRY: 512 SWITZERLAND

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

- aggressive marketing on the part of Canadian Exporters
- competitive export pricing for this market

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

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

Activity: ARRANGE AN EXHIBITION IN A HOTEL FOR A CANADIAN MANUFACTURER

Results Expected: NEW BUYING CONNECTIONS

Activity: VISIT POTENTIAL SWISS DISTRIBUTORS BY PRESENTING A GENERAL CATALOGUE OF THE MACHINERY SECTOR AND/OR BROCHURES ABOUT A SPECIFIC CANADIAN PRODUCT.

Results Expected: FIND NEW PROSPECTS.

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional Projects approved and planned for the coming fiscal year.		
Mission: 409 BERNE		
Sector: 001 AGRI & FOOD PRODUCTS & SERVICE		
010 FAIRS FOOD PROMOTION (MIGROS ET AL)		0587
Sector: 005 COMM. & INFORM. EQP. & SERV		
010 FAIRS TELECOM 87	GENEVA	1187
Sector: 006 ELECTRONICS EQUIP. & SERV		
024 MISSION INCOMING INCOMING BUYERS INCOMING BUYERS	MTL/TORONTO/OTTAWA MONTREAL	0087 0000
Sector: 013 CONSUMER PRODUCTS		
024 MISSION INCOMING FUR APPARELS BUYERS FROM SWITZERLAND SPORTING GOODS BUYER FROM SWITZERLAND C. S. G. A. MONTREAL INTERNATIONAL FUR FAIR	MONTREAL MONTREAL MONTREAL MONTREAL	0587 0188 0288 0587
Sector: 014 EDUCATION, MEDICAL, HEALTH PROD		
010 FAIRS IFAS 88	ZURICH	88
Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 409 BERNE		
Sector: 001 AGRI & FOOD PRODUCTS & SERVICE		
010 FAIRS IGEHO 89 FOOD PROMOTION (MIGROS ET AL)	BASEL	1189 0588
Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV		
010 FAIRS SECURITY 88	ZURICH	0588
Sector: 005 COMM. & INFORM. EQP. & SERV		
010 FAIRS COMPUTER 88	LAUSANNE	0488

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 409 BERNE		
Sector: 005 COMM. & INFORM. EQP. & SERV		
010 FAIRS		
SAMA 88	BASEL	0988
COMPUTER 89	LAUSANNE	0489
Sector: 007 POWER & ENERGY EQUIP. & SERV.		
010 FAIRS		
ENERGY 88	GENEVA	0988
Sector: 008 TRANSPORT SYS, EQUIP, COMP, SERV.		
010 FAIRS		
SITEV 88	GENEVA	0688
Sector: 013 CONSUMER PRODUCTS		
024 MISSION INCOMING		
MONTREAL INTL. FUR FAIR	MONTREAL	0588
C. S. G. A.	MONTREAL	0290
MONTREAL INTL. FUR FAIR	MONTREAL	0589
C. S. G. A.	MONTREAL	0289
Sector: 016 INDUSTRIAL MACHIN. PLANTS, SERV.		
010 FAIRS		
PRO AQUA-PRO VITA 89	BASEL	0989

Export and Investment Promotion Planning System

87/88 Trade and Economic Overview

Mission: 410 PARIS

Country: 112 FRANCE

LE MARCHÉ FRANÇAIS PROFITE À L'HEURE ACTUELLE D'UNE TENDANCE FAVORABLE DE L'ÉCONOMIE FRANÇAISE ET DES POLITIQUES DU GOUVERNEMENT ALLANT DANS LE SENS D'UNE PLUS GRANDE LIBÉRALISATION; DANS UN AVENIR PRÉVISIBLE CETTE TENDANCE DEVRAIT SE MAINTENIR. LA LIBÉRALISATION DE L'ÉCONOMIE EST EN COURS DE RÉALISATION ET SE MANIFESTE PAR UNE DÉRÉGLEMENTATION ACCRUE, PAR L'ANNONCE DES PRIVATISATIONS, PAR LA LÈVEE PRESQUE TOTALE DU CONTRÔLE DES CHANGES; DE PLUS, ELLE EST SOUSTENDUE PAR LA VOLONTÉ D'OUVERTURE DE LA FRANCE SUR LE MONDE (ACCUEIL DES INVESTISSEMENTS ÉTRANGERS; ENCOURAGEMENTS AUX FIRMES FRANÇAISES À S'IMPLANTER HORS-HEXAGONE). IL FAUT ÉGALEMENT SOULIGNER LE RÔLE CRITIQUE DE LA FRANCE DANS LES MTN ET L'IMPACT QU'IL AURA SUR LA POURSUITE DE NOS INTÉRÊTS ÉCONOMIQUES ET COMMERCIAUX DANS CE PAYS.

QUELQUES INDICATEURS-CLES DÉMONTRENT DÉJÀ L'ÉVOLUTION POSITIVE DE L'ÉCONOMIE FRANÇAISE ET DES REPERCUSSIONS FAVORABLES QU'ELLE PEUT AVOIR SUR NOS ÉCHANGES COMMERCIAUX: LE P. I. B. S'ACCROÎT DE 2.5% EN 1986 (1.1% EN 1985) ET DE 2.8% EN 1987; LA CONSOMMATION AUGMENTERA DE 3.0% EN 1986 (1.9% EN 1985) ET DE 2.0% EN 1987; FORTE CROISSANCE DES IMPORTATIONS PRÉVUE DE 4.8% ANNUELLEMENT POUR 1986 ET 1987 (2.9% EN 1985); RALENTISSEMENT SUBSTANTIEL DU TAUX D'INFLATION À ENVIRON 2.2% EN 1986 ET 2.4% EN 1987.

DU CÔTÉ CANADIEN, LES EXPORTATIONS ONT REPRIS UNE ALLURE ACCELERÉE DANS LES TROIS PREMIERS TRIMESTRES DE 1986, APRÈS AVOIR PRATIQUÉMENT MARQUÉ LE PAS EN 1985; IL Y A DES SIGNES ENCOURAGEANTS DANS LA REPRISE DE NOS EXPORTATIONS DE PRODUITS AGRICOLES ET DES PRODUITS DE L'INDUSTRIE AGRO-ALIMENTAIRES ET LA PERCÉE DANS LES SECTEURS DE LA BUREAUTIQUE, DE L'ÉLECTRONIQUE PROFESSIONNELLE ET DE L'AÉRONAUTIQUE. IL Y A EU RÉCEMMENT AUSSI L'EXPRESSION DE LA VOLONTÉ CANADIENNE D'ACCROÎTRE LA COOPÉRATION INDUSTRIELLE (INVESTISSEMENTS TERON ET CASCADES, SIGNATURES D'UNE LETTRE D'ENTENTE ENTRE CANADAIR ET AÉROSPATIALE; MISSION EUREKA CONDUITE PAR LE MINISTRE DU MEIR). IL NOUS FAUT AMPLIFIER CE COURANT PROMETTEUR; LE PLAN D'ACTION FRANCE QUI VIENT D'ÊTRE APPROUVÉ PAR LE CABINET CANADIEN AURA CE PRINCIPAL OBJECTIF, EN CIBLANT SUR QUATRE GRANDS SECTEURS PRIORITAIRES: L'AGRO-ALIMENTAIRE; LE BUREAUTIQUE ET LES LOGICIELS; L'ÉLECTRONIQUE ET L'AÉROSPATIALE; LES COMMUNICATIONS ET LES ÉQUIPEMENTS DE SÉCURITÉ.

Export and Investment Promotion Planning System

REPT: SYN-GEO 87/88 A. Post export program priorities

Region: WESTERN EUROPE

Mission: 410 PARIS

Market: 112 FRANCE

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

1. 001 AGRI & FOOD PRODUCTS & SERVICE

REASONS: BONNE REPOSE DU MARCHE A NOS TENTATIVES RECENTES D'INTRODUCTION DE PRODUITS ALIMENTAIRES; BONNE DISPOSITION DES MEDIAS SPECIALISES; ATOUT CADIEN (NVEAUTE). INTERET DES GRANDES CENTRALES DE DISTR. AUX PROD. CDNS

2. 002 FISHERIES, SEA PRODUCTS & SERV.

REASONS: REPUTATION DES PRODUITS CANADIENS, SURTOUT EN HAUT-DE-GRAMME; OFFRE CANADIENNE EST VASTE ET S'ETEND SUR PLUSIEURS PRODUITS.

3. 004 DEFENCE PROGRAMS, PRODUCTS, SERV

REASONS: SERIEUX DES FIRMES CANADIENNES EN MATIERE DE DEFENSE ET DE SECURITE; PRODUITS ONT FAIT LEURS PREUVES (NOTAMENT EN SECURITE) SUR LE MARCHE FRANCAIS; INTERET DES FIRMES FRANC. A COOPERER (TECH.) AVEC PARTEN. CDNS

4. 005 COMM. & INFORM. EQP. & SERV

REASONS: MARCHE EN FORTE CROISSANCE ET TRES OUVERT; DYNAMISME DE L'OFFRE CANADIENNE ET SOUPLESSE D'ADAPTATION AUX CONDITIONS DU MARCHE FRANCAIS; PAS DE PROBLEME DE LANGUE (LOGICIELS).

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

1. 012 PETROCHEM & CHEM PROD, EQP, SERV

2. 010 MINE, METAL, MINERAL PROD & SRV

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

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 410 PARIS

Market: 112 FRANCE

Sector: 001 AGRI & FOOD PRODUCTS & SERVICE

Subsector: 011 ANIMAL, POULTRY BREEDING STOCK

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	600.00M	\$ 575.10M	\$ 464.80M	\$ 445.70M
Canadian Exports \$	4.00M	\$ 3.20M	\$ 2.00M	\$ 5.40M
Canadian Share of Import Market	0.66%	0.55%	0.43%	1.20%

Major Competing Countries

Market Share

i) 354 NETHERLANDS	033 %
ii) 038 BELGIUM	032 %
iii) 099 POLAND	007 %
iv) 128 GERMANY WEST	007 %
v) 051 UNITED KINGDOM	007 %
vi) 577 UNITED STATES OF AMERICA	004 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) CHEVAUX	\$ 0.01 M
ii) CHEVRES	\$ 0.01 M
iii) SEMENCE BOVINE	\$ 0.75 M
iv) VERS DE TERRE	\$ 0.08 M
v) VOLAILLES	\$ 0.30 M
vi) BOVINS REPRODUCTEURS	\$ 0.70 M

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

- exports of certain products or services to this country are subject to Canadian export controls
- the degree of import duty protection of local industry tends to be low
- approval of technical standards can present problems in the case of some imported products

Export and Investment Promotion Planning System

MISSION: 410 PARIS

COUNTRY: 112 FRANCE

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

- non-tariff protectionist measures which are difficult to overcome
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

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

- participation in trade fairs
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada

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

- the adequacy of exporter information in Canadian Directories

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

Activity: IDENTIFICATION DES EXPORTATEURS CANADIENS POTENTIELS POUVANT COMBLER LES BESOINS (DEMANDES) DEJA IDENTIFIES PAR L'AMBASSADE.

Results Expected: MIEUX REpondre A DEMANDE CROISSANTE

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 410 PARIS

Market: 112 FRANCE

Sector: 001 AGRI & FOOD PRODUCTS & SERVICE

Subsector: 013 SEEDS & SPECIAL CROPS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1700.00M	\$ 1600.00M	\$ 1183.90M	\$ 967.80M
Canadian Exports \$	9.00M	\$ 7.90M	\$ 4.30M	\$ 6.10M
Canadian Share of Import Market	0.52%	0.50%	0.36%	0.63%

Major Competing Countries

Market Share

i) 128 GERMANY WEST	011 %
ii) 038 BELGIUM	009 %
iii) 354 NETHERLANDS	007 %
iv) 577 UNITED STATES OF AMERICA	005 %
v) 548 TURKEY	003 %
vi) 237 ITALY	002 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) LEGUMES SECS	\$ 3.50 M
ii) RIZ SAUVAGE	\$ 0.05 M
iii) PLANTES MEDICINALES	\$ 0.20 M
iv) SEMENCES	\$ 4.00 M
v) TABAC	\$ 0.10 M

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

- exports of certain products or services to this country are subject to Canadian export controls
- the degree of import duty protection of local industry tends to be low
- approval of technical standards can present problems in the case of some imported products

Export and Investment Promotion Planning System

MISSION: 410 PARIS

COUNTRY: 112 FRANCE

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

- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- non-tariff protectionist measures which are difficult to overcome
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

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

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

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

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

Activity: ETUDES DE MARCHES (A FAIRE) DANS LES PRODUITS DE CE SOUS-SECTEUR.

Results Expected: MEILLEURE CONNAISSANCE DU MARCHÉ ET DE SES CARACTERISTIQUES.

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

Activity: CAMPAGNE D'INFORMATION/DE SENSIBILISATION AUPRES DES ACHETEURS, DES UTILISATEURS OU DES CONSOMMATEURS.

Results Expected: ORIENTER LA DEMANDE VERS DES PRODUITS CANADIENS.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 410 PARIS

Market: 112 FRANCE

Sector: 001 AGRI & FOOD PRODUCTS & SERVICE

Subsector: 014 MEATS & MEAT BY-PRODUCTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	2800.00M	\$ 2600.00M	\$ 2538.20M	\$ 2250.90M
Canadian Exports \$	30.00M	\$ 25.00M	\$ 18.90M	\$ 19.80M
Canadian Share of Import Market	1.07%	0.96%	0.74%	0.88%

Major Competing Countries

Market Share

i) 354 NETHERLANDS	018 %
ii) 051 UNITED KINGDOM	016 %
iii) 038 BELGIUM	015 %
iv) 128 GERMANY WEST	012 %
v) 224 IRELAND	009 %
vi) 093 DENMARK	005 %

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

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects

Current Total Imports

In Canadian \$

i) CHARCUTERIE	\$ 0.00 M
ii) ABATS	\$ 4.70 M
iii) VIANDE CHEVALINE	\$ 14.00 M

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

- exports of certain products or services to this country are subject to Canadian export controls
- the degree of import duty protection of local industry tends to be moderate
- approval of technical standards can present problems in the case of some imported products

Export and Investment Promotion Planning System

MISSION: 410 PARIS

COUNTRY: 112 FRANCE

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

- non-tariff protectionist measures which are difficult to overcome
- other factor(s) described by the Trade Office as follows:

AGREMENT COMMUNAUTAIRE EUROPEEN DES ABATTOIRS CANADIENS.

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

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

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

Activity: AGREMENT DES USINES DE TRANSFORMATION CANADIENNES PAR FRANCE.

Results Expected: AUGMENTER NOMBRE DE FOURNISSEURS POTENTIELS.

Activity: PRESENTER PRODUITS CANADIENS DE CHARCUTERIE AUX ACHETEURS DES GRANDS GROUPES DE DISTRIBUTION.

Results Expected: ACCROITRE CONSIDERABLEMENT VENTES.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 410 PARIS

Market: 112 FRANCE

Sector: 001 AGRI & FOOD PRODUCTS & SERVICE

Subsector: 015 SEMI & PROCESSED FOOD & DRINK

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	3000.00M	\$ 2800.00M	\$ 2221.30M	\$ 1984.10M
Canadian Exports \$	9.00M	\$ 7.90M	\$ 4.88M	\$ 4.36M
Canadian Share of Import Market	0.30%	0.28%	0.21%	0.21%

Major Competing Countries

Market Share

i) 237 ITALY	020 %
ii) 038 BELGIUM	013 %
iii) 051 UNITED KINGDOM	008 %
iv) 128 GERMANY WEST	007 %
v) 354 NETHERLANDS	006 %
vi) 115 MOROCCO	004 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are
good market prospects

Current Total Imports

i) MIEL	In Canadian \$	\$ 0.60 M
ii) BLEUETS SURGELES	\$	0.30 M
iii) WHISKY	\$	0.20 M
iv) MAIS EN CONSERVE	\$	0.60 M
v) SIROP D'ERABLE	\$	0.30 M

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

- exports of certain products or services to this country are subject to Canadian export controls
- the degree of import duty protection of local industry tends to be high
- approval of technical standards can present problems in the case of some imported products

Export and Investment Promotion Planning System

MISSION: 410 PARIS

COUNTRY: 112 FRANCE

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

- non competitive pricing
- the unsuitability of Canadian products for this market
- high tariffs
- non-tariff protectionist measures which are difficult to overcome
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters
- other factor(s) described by the Trade Office as follows:
NORMES D'EMBALLAGE, D'ETIQUETTAGE AINSI QUE LES ADDITIFS AUTOMATISÉS SONT TRÈS DIFFÉRENTS.

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

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

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

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

Activity: IDENTIFICATION DES EXPORTATEURS CANADIENS ET IMPORTATEURS POTENTIELS FRANÇAIS. INFORMATISATION DES DONNÉES.

Results Expected: MEILLEURE ADEQUATION ENTRE OFFRE ET DEMANDE.

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

Activity: ORGANISATION D'UNE QUINZAINE AVEC GRAND MAGASIN.

Results Expected: INTRODUIRE DE NOUVEAUX PRODUITS.

Activity: PRESENTATION DES PRODUITS CANADIENS AUX ACHETEURS DES GRANDES CHAINES DE DISTRIBUTION.

Results Expected: INTRODUIRE DE NOUVEAUX PRODUITS ET ACCROITRE VENTES.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 410 PARIS

Market: 112 FRANCE

Sector: 002 FISHERIES, SEA PRODUCTS & SERV.

Subsector: 021 FISH & SHELLFISH & OTHER PROD

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1731.00M	\$ 1598.00M	\$ 1055.80M	\$ 946.70M
Canadian Exports \$	82.30M	\$ 70.10M	\$ 55.50M	\$ 69.40M
Canadian Share of Import Market	4.76%	4.39%	5.25%	7.33%

Major Competing Countries

Market Share

i) 051 UNITED KINGDOM	013 %
ii) 577 UNITED STATES OF AMERICA	011 %
iii) 354 NETHERLANDS	009 %
iv) 410 NORWAY	009 %
v) 093 DENMARK	007 %
vi) 224 IRELAND	003 %

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

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) SAUMON CONGELE	\$ 29.10 M
ii) HOMARD CONGELE	\$ 9.00 M
iii) HOMARD VIVANT	\$ 4.90 M
iv) MORUE SALEE	\$ 3.30 M
v) FILET CONG. CABILLAUD	\$ 3.00 M
vi) BROCHET CONGELE	\$ 3.00 M
vii) CRABE CONGELE	\$ 0.90 M
viii) CREVETTES	\$ 0.40 M
ix) COQUILLE ST-JACQUES	\$ 0.00 M
x) LOTTES	\$ 0.00 M

Export and Investment Promotion Planning System

MISSION: 410 PARIS

COUNTRY: 112 FRANCE

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

- exports of certain products or services to this country are subject to Canadian export controls
- the degree of import duty protection of local industry tends to be low
- approval of technical standards can present problems in the case of some imported products

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

- a lack of interest in the market on the part of Canadian exporters
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters
- other factor(s) described by the Trade Office as follows:
FORTE ATTRACTION DES MARCHES AMERICAINS ET JAPONAIS. MARCHE FRANCAIS EXIGEANT SUR PRESENTATION DES PRODUITS ET REGLEMENTS SANITAIRES, DATES COGELATION ET UTILISATION-CERTAINES ESPECES PEUVENT ETRE MIEUX VALORISEES.

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

- participation in trade fairs
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada

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

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

Activity: IDENTIFICATION DES EXPORTATEURS CANADIENS ET DES IMPORTATEURS POTENTIELS FRANCAIS. -INFORMATISATION DE CES DONNEES.

Results Expected: MEILLEURE ADEQUATION ENTRE OFFRE ET DEMANDE.

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

Activity: ETUDE SUR LA COMMERCIALISATION DES HOMARDS CANADIENS EN FRANCE ET CAMPAGNE PUBLICITAIRE.

Results Expected: AUGMENTATION DES VENTES.

Export and Investment Promotion Planning System

MISSION: 410 PARIS

COUNTRY: 112 FRANCE

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

Activity: ETUDES (MENEES PAR LA MISSION) SUR QUELQUES PRODUITS DU SECTEUR ET DIFFUSION AUPRES DES EXPORTATEURS CANADIENS.

Results Expected: MEILLEURE CONNAISSANCE DES EXPORTATEURS POTENTIELS DU MARCHE FRANCAIS.

Activity: MOIS DES PRODUITS DE LA MER CANADIENS A PARIS ORGANISE AVEC "FORTUNE DES MERS" (RESTAURATEUR ET DISTRIBUTEUR DE PRODUITS DE LA MER).

Results Expected: SENSIBILISATION DU PUBLIC AUX PRODUITS CANADIENS DU SECTEUR.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 410 PARIS

Market: 112 FRANCE

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	80.00M	\$ 85.00M	\$ 65.00M	\$ 80.00M
Canadian Exports \$	5.00M	\$ 6.00M	\$ 3.20M	\$ 3.50M
Canadian Share of Import Market	6.30%	7.10%	4.90%	4.40%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	065 %
ii) 128 GERMANY WEST	035 %

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

Current status of Canadian exports: No Export results to date

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) AVIONS CL-215T	\$ 200.00 M
ii) AVIONS CL-289	\$ 160.00 M
iii) MOULAGES	\$ 0.00 M
iv) SONOBUOYS	\$ 0.00 M
v) COMPOSANTS ELECTRONIQUES	\$ 0.00 M
vi) PIECES DE MOTEURS	\$ 0.00 M

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

- exports of certain products or services to this country are subject to Canadian export controls
- approval of technical standards can present problems in the case of some imported products

Export and Investment Promotion Planning System

MISSION: 410 PARIS

COUNTRY: 112 FRANCE

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

- non-tariff protectionist measures which are difficult to overcome
- other factor(s) described by the Trade Office as follows:

POLITIQUE FRANCAISE D'INDEPENDANCE EN MATIERE DE DEFENSE, PREFERENCES AUX SOURCES ET PRODUITS FRANCAIS.

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

- aggressive marketing on the part of Canadian Exporters
- participation in trade missions
- use of Canadian Government export promotion activities
- Canada's position as one of the few major sources of international supply

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

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

Activity: APPUI A CANADAIR SUR LES PROJETS CL-215T ET CL-289.

Results Expected: VENTES IMPORTANTES A LA SECURITE CIVILE ET AU MINISTERE DE LA DEFENSE RESPECTIVEMENT.

Activity: APPUI A CONAIR SUR LE PROJET F-27 BOMBARDIER D'EAU.

Results Expected: LOCATION-VENTE DES CONAIR F-27 A LA SECURITE CIVILE.

Activity: IDENTIFICATION D'AUTRES PROJETS FRANCAIS OU CANADIENS SUSCEPTIBLES A LA COLLABORATION INDUSTRIELLE.

Results Expected: INVESTISSEMENTS ACCRUS AU CANADA ET TRANSFERTS DE TECHNOLOGIE ET VENTES ADDITIONNELLES

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

Activity: PROMOUVOIR AGRESSIVEMENT LA COOPERATION INDUSTRIELLE ENTRE LES SOCIETES CANADIENNES ET FRANCAISES DANS LE SECTEUR DE MATERIEL DE DEFENSE.

Results Expected: PENETRATION A LONG TERME D'EXPORTATIONS CANADIENNES DANS LE MARCHE FRANCAIS (EG. CL-125, CL-289).

Export and Investment Promotion Planning System

MISSION: 410 PARIS

COUNTRY: 112 FRANCE

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

Activity: ORGANISATION DE LA PARTICIPATION CANADIENNE AU SALON INTERNATIONAL DE L'ESPACE ET DE L'AERONAUTIQUE A PARIS EN 1987.

Results Expected: PROMOTION DE L'INDUSTRIE CANADIENNE DE L'AVIATION.

Export and Investment Promotion Planning System

• 87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 410 PARIS

Market: 112 FRANCE

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

Subsector: 053 TELECOMMUNICATIONS (INC SPACE)

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	3230.00M	\$ 2858.60M	\$ 2315.90M	\$ 2078.50M
Canadian Exports \$	38.40M	\$ 32.00M	\$ 22.20M	\$ 21.80M
Canadian Share of Import Market	1.20%	1.12%	0.96%	1.00%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	022 %
ii) 128 GERMANY WEST	021 %
iii) 237 ITALY	010 %
iv) 265 JAPAN	008 %
v) 051 UNITED KINGDOM	007 %
vi) 354 NETHERLANDS	004 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) TELEPHONE PORTATIFS ET PRODUITS PERIFERAUX	\$ 18.70 M
ii) TALKIE/WALKIE	\$ 19.20 M
iii) APPAREILS DE RADIO DETECTION & RADIOSONDAGE	\$ 74.40 M
iv) ANTENNES D'EMISSION OU DE RECEPTION	\$ 36.70 M
v) CONNEXIONS ET ELEMENTS DE CONTACT PR TELECOM.	\$ 57.20 M
vi) APPAREIL DE PRISE DE VUE POUR TELEVISION	\$ 63.80 M
vii) RELAIS POUR TELECOM.	\$ 25.80 M
viii) APPAREILS ELECTRIQUES PR TELEPHONIE & PIECES DET.	\$ 68.80 M
ix) RECEPTEURS DE POCHE (PAGING SYSTEME)	\$ 8.00 M
x) APPAREILS ELECTRIQUES PR TELEGRAPHIE PAR FIL	\$ 30.70 M

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

i) Project Name: CABLAGE DES PRINCIPALES VILLES FRANCAISES

Approximate Value: \$ 4 M

Financing Source: 012 DOM

For further info. please contact:

AMBASSADE DE PARIS TLX 280 806F

Export and Investment Promotion Planning System

MISSION: 410 PARIS

COUNTRY: 112 FRANCE

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

ii) Project Name: 40 CHAINES REGIONALES DE T. V. ET 2
NATIONALES

Approximate Value: \$ 1.2 M

Financing Source: 028 TO/DETER

For further info. please contact:

AMBASSADE DE PARIS TLX 280 806F TEL: 47-23-01-01

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

- there are import restrictions which can present significant problems
- the degree of import duty protection of local industry tends to be high
- approval of technical standards can present problems in the case of some imported products

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

- a lack of interest in the market on the part of Canadian exporters
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- non-tariff protectionist measures which are difficult to overcome
- other factor(s) described by the Trade Office as follows:

CE MARCHE EST TRES COMPETITIF.

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

- No factors reported by mission

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

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

- the adequacy of exporter information in Canadian Directories

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

Activity: ETUDE DETAILLEE AFIN D'IDENTIFIER CRENEAUX.

Results Expected: AMELIORATION DE POSITION COMME DANS SECTEUR
SUR MARCHE FRANCAIS.

Export and Investment Promotion Planning System

MISSION: 410 PARIS

COUNTRY: 112 FRANCE

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

Activity: ELABORATION D'UN PLAN D'ACTION POUR L'AMBASSADE DANS CE SECTEUR.

Results Expected: CONNAISSANCE PLUS APPROFONDIE DES "CRENEAUX" PORTEURS.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 410 PARIS

Market: 112 FRANCE

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

Subsector: 054 COMPUTERS, SOFTWARE & SYSTEMS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	3700.00M	\$ 3619.40M	\$ 3706.00M	\$ 2800.90M
Canadian Exports \$	22.00M	\$ 14.38M	\$ 31.33M	\$ 19.37M
Canadian Share of Import Market	0.60%	0.40%	0.80%	0.70%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	035 %
ii) 128 GERMANY WEST	011 %
iii) 051 UNITED KINGDOM	009 %
iv) 265 JAPAN	008 %
v) 237 ITALY	005 %
vi) 507 SWEDEN	002 %

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

Current status of Canadian exports: Market share declining

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) MAINFRAME & SYSTEMES	\$ 881.40 M
ii) MODEMS/INTERFACE	\$ 851.30 M
iii) MINIS ET SYSTEMES	\$ 509.80 M
iv) LOGICIELS	\$ 437.80 M
v) MEMOIRES ET SYSTEME DE PROGRAMMATION	\$ 420.60 M
vi) CONTROLEURS/CONVERTIS.	\$ 279.80 M
vii) DISQUES ET DISQUETTES: SYSTEMES DE SAISIE, DEROULEUR	\$ 188.89 M
viii) EQUIPEMENTS AUXILIAIRES DIVES	\$ 0.00 M

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

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

Export and Investment Promotion Planning System

MISSION: 410 PARIS

COUNTRY: 112 FRANCE

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

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

LE MARCHE EN FRANCE DE MICRO-ORDINATEURS A CHUTE EN 1985/86 AVEC UN IMPACT FORT SUR NOS EXPORTATIONS DE HARDWARE ET SOFTWARE, LOGICIELS/PROGICIELS DANS CE DOMAINE.

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

- No factors reported by mission

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

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

- the adequacy of exporter information in Canadian Directories

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

Activity: ETUDE DETAILLEE AFIN D'IDENTIFIER LES CRENEAUX POTENTIELS.

Results Expected: RENFORCEMENT DE POSITION DES EXPORTATIONS CANADIENNES EN FRANCE DANS CE SECTEUR.

Activity: SUITE A LA TERMINATION DE L'ETUDE, ELABORATION D'UNE STRATEGIE D'ACTION A LONG TERME PAR L'AMBASSADE DANS CE SECTEUR.

Results Expected: MISE EN PLACE D'UN PLAN D'ACTION CIBLE MULTI-SECTEURS

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 410 PARIS

Market: 112 FRANCE

Sector: 006 ELECTRONICS EQUIP. & SERV

Subsector: 061 PRODUCTS & COMPONENTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	4130.00M	\$ 3530.30M	\$ 2610.60M	\$ 2293.10M
Canadian Exports \$	41.50M	\$ 36.50M	\$ 28.90M	\$ 26.20M
Canadian Share of Import Market	1.00%	1.03%	1.10%	1.14%

Major Competing Countries

Market Share

i) 128 GERMANY WEST	021 %
ii) 577 UNITED STATES OF AMERICA	019 %
iii) 265 JAPAN	008 %
iv) 237 ITALY	000 %

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

Current status of Canadian exports: Mature with little growth

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) SEMI-CONDUCTEURS	\$ 47.00 M
ii) CIRCUITS IMPRIMES	\$ 16.70 M
iii) TUBES ELECTRONIQUES	\$ 8.40 M
iv) DIVERS	\$ 8.00 M
v) CONDENSATEURS	\$ 5.20 M
vi) RESISTANCE	\$ 0.00 M
vii) BOBINAGE	\$ 0.00 M
viii) CONNECTEURS	\$ 0.00 M
ix) HAUTS-PARLEURS	\$ 0.00 M
x) CIRCUITS PIEZO-ELECTRIQUES	\$ 0.00 M

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

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

Export and Investment Promotion Planning System

MISSION: 410 PARIS

COUNTRY: 112 FRANCE

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

- non-tariff protectionist measures which are difficult to overcome
- other factor(s) described by the Trade Office as follows:

LE MONOPOLE DES PTT FRANCAISES LIMITE LES POSSIBILITES DE VENTES DIRECTES AUX UTILISATEURS FINAUX DE CERTAINS PRODUITS. NEANMOINS, IL EXISTE UN MARCHE IMPORTANT POUR LES COMPOSANTS ELECTRONIQUES CANADIENS.

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

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

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

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

Activity: SUIVI DES RESULTATS DU SALON INTERNATIONAL DES COMPOSANTS ELECTRONIQUES (PARIS).

Results Expected: VOIR CE QUE NOS EXPOSANTS/COMPAGNIES ONT ACCOMPLI DEPUIS NOTRE PARTICIPATION EN 1985 (VENTES, DISTRIBUTEURS TROUVES.)

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

Activity: IDENTIFICATION PAR L'INTERMEDIAIRE DES SYNDICATS PROFESSIONNELS DES PLUS GRANDS IMPORTATEURS FRANCAIS: CONTACTS ET ORIGINE DE LEURS IMPORTATIONS.

Results Expected: ACCROISSEMENT DES EXPORTATIONS CANADIENNES DE COMPOSANTS ELETRONIQUES.

Export and Investment Promotion Planning System

MISSION: 410 PARIS

COUNTRY: 112 FRANCE

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

Activity: ORGANISATION DE REUNIONS D'EXPORTATEURS CANADIENS EN FRANCE ET D'INDUSTRIELS FRANCAIS AU CANADA.

Results Expected: MEILLEURE ADEQUATION ENTRE ACHETEURS FRANCAIS ET FOURNISSEURS CANADIENS

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 410 PARIS

Market: 112 FRANCE

Sector: 006 ELECTRONICS EQUIP. & SERV

Subsector: 062 INSTRUMENTATION

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	0.00M NA	\$ 1816.40M	\$ 676.00M	\$ 1290.00M
Canadian Exports \$	0.00M NA	\$ 9.00M	\$ 3.59M	\$ 11.30M
Canadian Share of Import Market	0.00% NA	0.50%	0.50%	0.80%

Major Competing Countries

Market Share

i) 128 GERMANY WEST	033 %
ii) 577 UNITED STATES OF AMERICA	025 %
iii) 051 UNITED KINGDOM	011 %
iv) 512 SWITZERLAND	006 %
v) 237 ITALY	005 %
vi) 354 NETHERLANDS	003 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) REGULATEURS ELECTRONIQUES	\$ 68.60 M
ii) INSTRUMENTS & APPAREILS DE MESURE	\$ 66.70 M
iii) APPAREILS & INSTRUMENTS DE MESURE DE GRAND. ELECTR.	\$ 52.60 M
iv) APPAREILS ELECTRON. D'ESSAIS DE MATERIEL & MATER.	\$ 41.40 M
v) PARTIES, PIECES DETACHEES PR APPAREILS DE PESAGE	\$ 41.30 M
vi) VOLTMETRES SELECTIFS, ANALYSEURS D'ONDES, ETC.	\$ 34.10 M
vii) THERMOSTATS, SAUF CEUX A DECLenchement ELECTRIQUE	\$ 22.80 M
viii) REGULATEURS	\$ 22.60 M
ix) APPAREILS & INSTRUM. DE MESURE (EXCL. OPTIQUE)	\$ 2.20 M
x) PIECES DETACHEES/INSTRUMENTS/ANAL. CHIM & PHYS.	\$ 29.50 M

Export and Investment Promotion Planning System

MISSION: 410 PARIS

COUNTRY: 112 FRANCE

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

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

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

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

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

- No factors reported by mission

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

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

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

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

Activity: .ETUDE DE MARCHE ET STRATEGIE A LONG TERME DANS CE SECTEUR.

Results Expected: AMELIORATION DE LA POSITION CANADIENNE SUR LA FRANCE DANS SECTEUR D'INSTRUMENTATION.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 410 PARIS

Market: 112 FRANCE

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

Subsector: 081 AUTOMOTIVE

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1470.00M	\$ 1365.20M	\$ 979.70M	\$ 1110.00M
Canadian Exports \$	2.90M	\$ 2.60M	\$ 1.70M	\$ 1.30M
Canadian Share of Import Market	0.19%	0.19%	0.18%	0.12%

Major Competing Countries

Market Share

i) 128 GERMANY WEST	036 %
ii) 499 SPAIN	010 %
iii) 237 ITALY	009 %
iv) 051 UNITED KINGDOM	000 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) ORGANES DE TRANSM. AUTRES QUE BOITES VITESSE & PONT	\$ 0.00 M
ii) PIECES DETACHEES & ACCESS. NDA DE VEHICLES AUTO.	\$ 0.00 M
iii) GARNITURES DE FRICTION MONTEES PR FREINS A DISQUES	\$ 0.00 M
iv) PIECES DETACHEES & ACCESS. AUTO. (+TRANSP. PERSON.	\$ 0.00 M
v) AUTRES RADIATEURS ET LEURS PARTIES	\$ 0.00 M

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

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

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

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

Export and Investment Promotion Planning System

MISSION: 410 PARIS

COUNTRY: 112 FRANCE

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

- competitive export pricing for this market
- strong sectoral capability in Canada

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

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

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

Activity: MAILING AGRESSIF AUPRES DES SOCIETES IMPORTATRICES FRANCAISES DE PIECES AUTOMOBILES POUR AUGMENTER CONNAISSANCE DES CAPACITES ET PRODUITS CANADIENS.

Results Expected: PENETRER LE MARCHE DE "SECONDE-MONTE"
(ACCESSOIRES ET REMPLACEMENT)

Activity: MISSIONS D'EXPORTATEURS CANADIENS DE PIECES, EQUIPEMENTS POUR AUTOMOBILES. VISITES APPUYEES PAR LE PEMD.

Results Expected: ENCOURAGER LES JOINT-VENTURES & LES ECHANGES DE TECHNOLOGIES EN FONCTION DE LA VOITURE DU FUTUR: MATERIAUX COMPOSITES, ELECTRONIQUE; CERAMIQUE

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 410 PARIS

Market: 112 FRANCE

Sector: 009 FOREST PRODUCTS, EQUIP, SERVICES

Subsector: 092 WOOD AND WOOD PRODUCTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1900.00M	\$ 1800.00M	\$ 1301.00M	\$ 1205.00M
Canadian Exports \$	60.00M	\$ 50.00M	\$ 36.00M	\$ 48.00M
Canadian Share of Import Market	3.20%	2.80%	2.80%	4.00%

Major Competing Countries

Market Share

i) 128 GERMANY WEST	010 %
ii) 038 BELGIUM	009 %
iii) 504 FINLAND	008 %
iv) 629 GABON	008 %
v) 507 SWEDEN	008 %
vi) 139 IVORY COAST	007 %

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

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) BOIS D'OEUVRE	\$ 28.00 M
ii) CONTREPLAQUE	\$ 5.00 M
iii) BOIS OUVRES	\$ 0.20 M
iv) BARDEAUX	\$ 0.20 M
v) WAFERBOARD	\$ 0.05 M

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

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

Export and Investment Promotion Planning System

MISSION: 410 PARIS

COUNTRY: 112 FRANCE

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

- non competitive pricing
- other factor(s) described by the Trade Office as follows:
TAUX DE CHANGE DU DOLLAR PAR RAPPORT A LA CONCURRENCE CES DERNIERES ANNEES.

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

- participation in trade fairs
- use of Canadian Government export promotion activities
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada

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

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

Activity: SEMINAIRE.

Results Expected: DEVELOPPER LA DEMANDE DES UTILISATEURS FRANCAIS.

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

Activity: SEMINAIRE.

Results Expected: DEVELOPPER LA DEMANDE DES UTILISATEURS FRANCAIS.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 410 PARIS

Market: 112 FRANCE

Sector: 010 MINE, METAL, MINERAL PROD & SRV

Subsector: 102 MINERALS AND MINERAL PRODUCTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	0.00M	\$ 1628.30M	\$ 1851.80M	\$ 1521.80M
Canadian Exports \$	0.00M	\$ 140.40M	\$ 113.00M	\$ 70.60M
Canadian Share of Import Market	10.00%	8.60%	6.10%	4.60%

Major Competing Countries

Market Share

i) 128 GERMANY WEST	027 %
ii) 577 UNITED STATES OF AMERICA	019 %
iii) 288 SOUTH AFRICA	019 %
iv) 011 AUSTRALIA	014 %
v) 099 POLAND	050 %
vi) 553 UNION OF SOVIET SOC REP	021 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) CHARBON	\$ 79.40 M
ii) SOUFRE	\$ 37.10 M
iii) AMIANTE	\$ 23.70 M

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

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

- No factors reported by mission

Export and Investment Promotion Planning System

MISSION: 410 PARIS

COUNTRY: 112 FRANCE

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

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

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

Activity: LE POSTE CONTINUERA A SURVEILLER DE TRES PRES CES 3 MINERAUX ET CONTINUERA D'AVISER OTTAWA SUR LES MOINDRES EVOLUTIONS NOTAMMENT POUR L'AMIANTE.

Results Expected: NE PAS SUBIR UN DECLIN TROP RAPIDE DE NOS VENTES D'AMIANTE.

Activity: SUIVRE LA RESTRUCTURATION DE L'ATIC (ASSOCIATION TECHNIQUE POUR L'IMPORTATION CHARBONNIERE) DONT LE MONOPOLE D'IMPORTATION DES PAYS-TIERS (AUTRES QUE C. E. E.) DEVAIT ETRE SUPPRIME.

Results Expected: ESPERER VOIR NOS VENTES DE CHARBON AUGMENTER.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 410 PARIS

Market: 112 FRANCE

Sector: 010 MINE, METAL, MINERAL PROD & SRV

Subsector: 104 METALS, PRIMARY & FABRICATED

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	0.00M NA	\$ 753.00M	\$ 763.90M	\$ 730.10M
Canadian Exports \$	0.00M NA	\$ 106.00M	\$ 139.70M	\$ 105.60M
Canadian Share of Import Market	0.00% NA	14.00%	18.30%	14.30%

Major Competing Countries

Market Share

i) 047 BRAZIL	014 %
ii) 507 SWEDEN	013 %
iii) 426 PERU	010 %
iv) 011 AUSTRALIA	009 %
v) 148 MAURITANIA	008 %
vi) 288 SOUTH AFRICA	003 %

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

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) MINERAI DE FER	\$ 48.40 M
ii) TITANE	\$ 24.10 M
iii) MINERAI DE ZINC	\$ 22.70 M
iv) MOLYBDENE	\$ 8.30 M
v) MINERAI DE PLOMB	\$ 1.80 M
vi) TUNGSTENE	\$ 0.70 M

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

Export and Investment Promotion Planning System

MISSION: 410 PARIS

COUNTRY: 112 FRANCE

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

- No factors reported by mission

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

- aggressive marketing on the part of Canadian Exporters
- Canada's position as one of the few major sources of international supply

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

Activity: PROGRAMME ACTIF DE REALISATIONS DE RAPPORTS A OTTAWA. PROMOUVOIS DAVANTAGE COMMERCIALEMENT LES METAUX CANADIENS (LA REGION RHONE ALPES EST CELLE QUI IMPORTE LE PLUS DE PRODUITS DANS CE SECTEUR).

Results Expected: RESULTATS A ETRE "SUIVI" PAR NOTRE NOUVEAU CONSULAT A LYON QUI AVISERA LES EXPORTATEURS CDN EN CONSEQUENCE

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 410 PARIS

Market: 112 FRANCE

Sector: 012 PETROCHEM & CHEM PROD, EQP, SERV

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	22000.00M	\$20000.00M	\$13655.20M	\$11969.50M
Canadian Exports \$	136.00M	\$ 120.00M	\$ 82.00M	\$ 72.00M
Canadian Share of Import Market	0.60%	0.60%	0.60%	0.60%

Major Competing Countries

Market Share

i) 128 GERMANY WEST	024 %
ii) 606 BENELUX COUNTRIES	013 %
iii) 354 NETHERLANDS	012 %
iv) 051 UNITED KINGDOM	010 %
v) 577 UNITED STATES OF AMERICA	010 %
vi) 237 ITALY	006 %

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

Current status of Canadian exports: Mature with little growth

Products/services for which there are
good market prospects

Current Total Imports

	In Canadian \$
i) URANIUM NATUREL, COMPOSES, ALLIAGES	\$ 138.90 M
ii) CHLORURE DE POTASSIUM 40% K2O 62%	\$ 21.20 M
iii) PRODUITS PHARMACEUTIQUES EXTRAITS DE GLANDES	\$ 6.10 M
iv) AUTRES STYRENES	\$ 6.10 M
v) NITRATES D'AMONIUM ET SOL. AQUEUSES D'UREE	\$ 5.40 M
vi) PAPIERS, CARTES, TISSUS POUR IMAGES POLYCHROMES	\$ 5.30 M
vii) RADIOACTIFS ET ISOTOPES & COMPOSES AUTRES QU'URAN.	\$ 4.80 M
viii) STYRENES POUR FABRICATION DE CAOUTCHOUC SYNTHETIQUE	\$ 3.20 M
ix) PELLICULES FILMS POUR IMAGES POLYCHROMES	\$ 3.10 M
x) DERIVES ORGANIQUES BENZOTHAZOLES	\$ 2.60 M

Export and Investment Promotion Planning System

MISSION: 410 PARIS

COUNTRY: 112 FRANCE

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

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

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

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

- support provided by the PEMD program
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities

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

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

- sourcing assistance from Canadian federal/provincial governments departments

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

Activity: ANALYSE D'UNE ETUDE SECTORIELLE DETAILLEE POUVANT FAIRE RESSORTIR LES FAIBLESSES DE LA CHIMIE FRANCAISE QUE DEVRA ETRE APPUYEE ET COMPAREE AVEC UNE ETUDE DEVANT ETRE REALISEE PAR OTTAWA SUR LES POINTS FORTS DE L'INDUSTRIE CHIMIQUE CANADIENNE.

Results Expected: CIBLER LES PRODUITS "EXPORTABLES"

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

Activity: CONTACTER LES ENTREPRISES FRANCAISES AFIN DE FAIRE COINCIDER LA "DEMANDE" FRANCIASE AVEC LA "CAPACITE" (L'OFFRE) CANADIENNE

Results Expected: LES EXPORTATIONS POURRAIENT SENSIBLEMENT AUGMENTER.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights

Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 410 PARIS

Market: 112 FRANCE

Sector: 013 CONSUMER PRODUCTS

Subsector: 131 APPAREL (CLOTH, FUR, SHOES) TEXT

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	4400.00M	\$ 3952.40M	\$ 1698.02M	\$ 1487.87M
Canadian Exports \$	65.00M	\$ 69.60M	\$ 83.10M	\$ 85.90M
Canadian Share of Import Market	0.29%	0.35%	0.74%	0.85%

Major Competing Countries

Market Share

i) 237 ITALY	028 %
ii) 128 GERMANY WEST	017 %
iii) 606 BENELUX COUNTRIES	015 %
iv) 051 UNITED KINGDOM	005 %
v) 512 SWITZERLAND	003 %
vi) 448 PORTUGAL	003 %

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

Current status of Canadian exports: Market share declining

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) VETEMENTS SPORT	\$ 0.50 M
ii) FOURRURES	\$ 3.00 M
iii) CHAUSSURES	\$ 3.00 M

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

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

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

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

MANQUE DE SUIVI DE LA PART DES FIRMES CANADIENNES; NE VEULENT JAMAIS FAIRE DE PUBLICITE.

Export and Investment Promotion Planning System

MISSION: 410 PARIS

COUNTRY: 112 FRANCE

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

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- use of Canadian Government export promotion activities

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

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

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

Activity: PRESENTATION DES PRODUITS CANADIENS D'HIVER AUX ACHETEURS DES GRANDS GROUPES DE DISTRIBUTION.

Results Expected: INTRODUIRE NOUVEAUX PRODUITS ET ACCROITRE VENTES.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 410 PARIS

Market: 112 FRANCE

Sector: 013 CONSUMER PRODUCTS

Subsector: 133 CULTURE INDUSTRIES

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	0.00M	\$ 1251.80M	\$ 814.40M	\$ 1619.90M
Canadian Exports \$	0.00M	\$ 5.20M	\$ 5.40M	\$ 6.00M
Canadian Share of Import Market	0.00%	0.40%	0.70%	0.40%

Major Competing Countries

Market Share

i) 128 GERMANY WEST	019 %
ii) 237 ITALY	016 %
iii) 606 BENELUX COUNTRIES	013 %
iv) 577 UNITED STATES OF AMERICA	008 %
v) 051 UNITED KINGDOM	008 %
vi) 512 SWITZERLAND	004 %

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

Current status of Canadian exports: Market share declining

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) LIVRES, BROCHURES & IMPRIMES SIMILAIRES	\$ 309.20 M
ii) JOURNAUX ET PUBLICATIONS PERIODIQUES IMPRIMES	\$ 247.10 M
iii) BANDES MAGNETIQUES (VIERGES)	\$ 111.80 M
iv) PHOTOS, AFFICHES, POSTERS	\$ 31.80 M
v) FILMS CINEMATOGRAPHIQUES	\$ 20.70 M
vi) CARTES POSTALES ET SIMILAIRES ILLUSTREES	\$ 18.50 M

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

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

Export and Investment Promotion Planning System

MISSION: 410 PARIS

COUNTRY: 112 FRANCE

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

- the unsuitability of Canadian products for this market
- the apparent limited sectoral capability in Canada compared to other competing export countries
- non-tariff protectionist measures which are difficult to overcome

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

- No factors reported by mission

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

Activity: SUIVI DE TABLE-RONDE SUR LES COMMUNICATIONS. ORGANISATION DE DEUXIEME RENCONTRE DES DECIDEURS FRANCAIS ET CANADIENS.

Results Expected: AUGMENTATION DES VENTES ET DU NOMBRE DE CO-PRODUCTIONS ENTRE 2 PAYS (AUDIOVISUEL: ESP. EMISSIONS T. V.).

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

Activity: SOUTIEN LOGISTIQUE OFFERT AUX CANADIENS AU MIDEM, ESP. VIA ASSOCIATIONS CIRPA/ADISQ.

Results Expected: FAVORISER LES CONTACTS ET DONC LES VENTES.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 410 PARIS

Market: 112 FRANCE

Sector: 013 CONSUMER PRODUCTS

Subsector: 134 LEISURE PROD. TOOLS HARDWARE

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	2400.00M	\$ 2250.00M	\$ 1663.00M	\$ 1556.00M
Canadian Exports \$	8.00M	\$ 7.20M	\$ 2.80M	\$ 2.90M
Canadian Share of Import Market	0.33%	0.32%	0.16%	0.18%

Major Competing Countries

Market Share

- i) 609 EUROPEAN COMMON MARKET C
- ii) 616 OTHER COUNTRIES

090 %
010 %

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

30-40 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports
In Canadian \$

- i) HOCKEY
- ii) QUINCAILLERIE
- iii) PISCINE
- iv) AQUA CENTERS

\$ 0.00 M
\$ 0.60 M
\$ 0.00 M
\$ 0.00 M

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

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

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

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- the apparent limited sectoral capability in Canada compared to other competing export countries
- difficulties of adaptation of marketing techniques to the market by some Canadian companies

Export and Investment Promotion Planning System

MISSION: 410 PARIS

COUNTRY: 112 FRANCE

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

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

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

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

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

Activity: PRESENTATION DES PRODUITS CANADIENS D'HIVER AUX ACHETEURS DES GRANDS GROUPES DE DISTRIBUTION.

Results Expected: INTRODUIRE NOUVEAUX PRODUITS ET ACCROITRE VENTES.

Activity: IDENTIFICATION DES INTERETS DES CENTRALES D'ACHAT EN PRODUITS CANADIENS DE BRICOLAGE ET RENOVATION.

Results Expected: DEFINIR POTENTIEL DE MARCHE ET ELABORER STRATEGIE DE PENETRATION.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 410 PARIS

Market: 112 FRANCE

Sector: 014 EDUCATION, MEDICAL, HEALTH PROD

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1279.00M	\$ 1122.02M	\$ 772.87M	\$ 680.14M
Canadian Exports \$	9.50M	\$ 7.92M	\$ 2.92M	\$ 1.98M
Canadian Share of Import Market	0.75%	0.70%	0.40%	0.30%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	030 %
ii) 128 GERMANY WEST	020 %
iii) 265 JAPAN	009 %
iv) 051 UNITED KINGDOM	007 %
v) 237 ITALY	006 %
vi) 606 BENELUX COUNTRIES	006 %

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

Current status of Canadian exports: Mature with little growth

Products/services for which there are
good market prospects

Current Total Imports

In Canadian \$

i) APPAREILS DE PROTHESE	\$ 4.57 M
ii) INSTRUM. & APPAREILS PR MEDECINE, CHIRURGIE & DENT.	\$ 1.09 M
iii) PIECES ET ACCESSOIRES POUR RAYONS X	\$ 0.52 M
iv) APPAREILS A RAYON X	\$ 0.30 M
v) CANULES ET CATHETERS	\$ 0.30 M
vi) APPAREILS D'AUDITION POUR SOURDS	\$ 0.27 M
vii) INSTRUMENTS DENTAIRES	\$ 0.21 M
viii) AIGUILLES ET SERINGUES	\$ 0.10 M
ix) INSTRUMENTS ELECTRODIAGNOSTIC	\$ 0.08 M

Export and Investment Promotion Planning System

MISSION: 410 PARIS

COUNTRY: 112 FRANCE

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

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

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

- a lack of interest in the market on the part of Canadian exporters
- the apparent limited sectoral capability in Canada compared to other competing export countries
- difficulties of adaptation of marketing techniques to the market by some Canadian companies

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

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

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

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

Activity: UN SEMINAIRE PREVU AVEC LES MEMBRES DE LA FEDERATION DES FABRICANTS DE MATERIEL MEDICO-CHIRURGICAL (FACOMED) N'A PAS PU AVOIR LIEU A CAUSE D'UNE RESTRUCTURATION DU FACOMED AVEC UN AUTRE SYNDICAT.

Results Expected: TRANSFERTS DE TECHNOLOGIES ET INVESTISSEMENTS POTENTIELS AU CANADA

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

Activity: SEMINAIRE DECRIE PLUS HAUT SERA TENU AU DEBUT DE L'ANNEE FISCALE PROCHAINE.

Results Expected: INVESTISSEMENTS FRANCAIS ET TRANSFERTS DE TECHNOLOGIES DEVRAIENT SENSIBLEMENT AUGMENTER

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 410 PARIS

Market: 112 FRANCE

Sector: 016 INDUSTRIAL MACHIN, PLANTS, SERV.

Subsector: 161 MANUFACT & MATERIAL PLANT, EGP.

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	27.90M	\$ 25.80M	\$ 18.50M	\$ 16.80M
Canadian Exports \$	2.70M	\$ 2.60M	\$ 4.40M	\$ 1.80M
Canadian Share of Import Market	9.70%	10.20%	23.80%	10.70%

Major Competing Countries

Market Share

i) 128 GERMANY WEST	014 %
ii) 512 SWITZERLAND	000 %
iii) 265 JAPAN	000 %
iv) 237 ITALY	000 %

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

Current status of Canadian exports: Market share declining

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) MACHINES, APPAREILS ET ENGINES MECANIQVES	\$ 0.00 M
ii) ALESEUSES-FRAISE. AUTOMAT. A PARTIR D'INFO. CODEES	\$ 0.00 M
iii) MACH.-OUTILS PR TRAVAIL DES METAUX&CARBURES METAL.	\$ 0.00 M

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

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

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

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

Export and Investment Promotion Planning System

MISSION: 410 PARIS

COUNTRY: 112 FRANCE

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

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

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

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

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

Activity: ENCOURAGEMENT DE VISITES CIBLEES D'EXPORTATEURS CANADIENS SOUS LE PROGRAMME PEMD.

Results Expected: MONTRER AUX INDUSTRIELS CDNS LE POTENTIEL QUI EXISTE EN FRANCE DANS CE SECTEUR ET QUI PEUT ALLER JUSQU'A LA REPRISE DE SOCIETES FRANCAISES EN DIFFICULTE FINANCIERE.

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional Projects approved and planned for the coming fiscal year.		
Mission: 410 PARIS		
Sector: 001 AGRI & FOOD PRODUCTS & SERVICE		
010 FAIRS		
SIA - PARIS	PARIS	0388
SALON DU CHEVAL -PARIS	PARIS	1287
Sector: 006 ELECTRONICS EQUIP. & SERV		
010 FAIRS		
PIAS-PARIS INT'L AIR SHOW 1987/LE BOURGET	CANNES	1187
PIAS-PARIS INT'L AIR SHOW 1987/LE BOURGET	PARIS	0687
Sector: 010 MINE, METAL, MINERAL PROD & SRV		
010 FAIRS		
BATIMAT (BUILDING MATERIALS), PARIS	PARIS	1287
Sector: 016 INDUSTRIAL MACHIN, PLANTS, SERV.		
010 FAIRS		
SITEF - TOULOUSE, FRANCE	TOULOUSE	1087
Sector: 999 MULTIPLE SECTORS		
010 FAIRS		
FOIRE REGIONALE - LYON	LYON	0487
FOIRE REGIONALE - DIJON	DIJON	1187
Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 410 PARIS		
Sector: 001 AGRI & FOOD PRODUCTS & SERVICE		
010 FAIRS		
SIA	PARIS	0390
SIAL	PARIS	1088
SALON DES METIERS BOUCHE	LYON	0189
SIA	PARIS	0389
Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV		
010 FAIRS		
PARIS AIR SHOW	PARIS	0689

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 410 PARIS		
Sector: 005 COMM. & INFORM. EQP. & SERV		
020 MISSION OUTGOING BUREAUTIQUE/LOGICIELS	PARIS/LYON	0590
Sector: 006 ELECTRONICS EQUIP. & SERV		
010 FAIRS SALON INTERNATIONAL DES COMPOSANTS ELECTRONIQUES	PARIS	1189
SICOB	PARIS	1488
EUROPROTECTION OU MILIPOL	PARIS	1188
MESUCORA	PARIS	1288
Sector: 008 TRANSPORT SYS, EQUIP, COMP, SERV. ELEC		
	PARIS	1288
020 MISSION OUTGOING MISSION INDUSTRIELLE	PARIS, TOULOUSE	1188
Sector: 009 FOREST PRODUCTS, EQUIP, SERVICES		
010 FAIRS BATIMAT	PARIS	1189
EUROBAT	LYON	1188
BATIBDIS	BORDEAUX	1088
Sector: 013 CONSUMER PRODUCTS		
010 FAIRS SIG	GRENOBLE	0389
020 MISSION OUTGOING MISSION BIJOUTERIE A BIJORHCA	PARIS	0988
Sector: 014 EDUCATION, MEDICAL, HEALTH PROD		
010 FAIRS HOPITAL-EXPO		1289
020 MISSION OUTGOING INTERMEDICA	PARIS	0588
Sector: 999 MULTIPLE SECTORS		
010 FAIRS FOIRE INTL DE LYON OU DE BORDEAUX	LYON/BORDEAUX	0089

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 410 PARIS		
Sector: 999 MULTIPLE SECTORS		
010 FAIRS FOIRE INTL. DE CAEN	CAEN	0988
024 MISSION INCOMING MISSION REGIONALE (CH. DE COMMERCE) MISSION REGIONALE (CH. DE COMMERCE)		0689 0688

Export and Investment Promotion Planning System

87/88 Trade and Economic Overview

Mission: 414 BRUSSELS

Country: 038 BELGIUM

THE KEY FACTOR SUPPORTING THE BELGIAN ECONOMY IN 1986 IS THE CONJOINED BENEFICIAL EFFECT OF THE CONTINUED SLIDE IN OIL PRICES AND THE RENEWED DEPRECIATION OF THE US DOLLAR. AS A DIRECT OR INDIRECT RESULT, INFLATION HAS BEEN REDUCED TO UNDER 2.5%; INTEREST RATES HAVE BEEN KEPT DOWN; INDEXED WAGES AND SALARIES ARE STABLE; INDUSTRY AS A WHOLE IS OPERATING AT 80% OF CAPACITY AND FORECASTING 9% GROWTH IN FIXED INVESTMENT; UNEMPLOYMENT (WHOLLY UNEMPLOYED RECEIVING SOCIAL SECURITY BENEFITS) ALTHOUGH STILL HIGH (12%) IS NOT RISING. BELGIAN INT'L TRADE IS ALSO BENEFITING FM THE OIL/DOLLAR COMBINATION AS IMPORT PRICES HAVE DECLINED AND TERMS OF TRADE IMPROVED. THE WEAKNESS IN COMMODITY PRICES HAS BEEN AN ADDED BONUS. THE RESULT IS A MARKED IMPROVEMENT IN BELGIUM'S TRADE NOW SHOWING A MUCH REDUCED DEFICIT - 23 BILLION BF IN THE FIRST HALF OF '86 COMPARED WITH DEFICITS OF 204 BILLION BF AND 152 BILLION BF IN '84 & '85 RESPECTIVELY. THE TRADE FORECAST ANTICIPATES IMPORTS TO GROW AT 4% IN '86 & 2% IN '87 WHILE EXPORTS ARE EXPECTED TO DO BETTER AT 4.5% AND 3.5% IN '86 & '87. METAL-WORKING HAS BEEN LEADING THE EXPORT SECTOR; HOWEVER ORDER BOOKS HAVE STARTED TO DECLINE AS THE STRENGTH OF THE FRANC HAS MADE NON-EUROPEAN SALES MORE DIFFICULT. ONE MAJOR QUESTION MARK FACING THE ECONOMY IS THE PUBLIC SECTOR DEFICIT. AN AUSTERITY PLAN HAS BEEN PUT IN PLACE THAT IS INTENDED TO REDUCE THE CENTRAL GOVT'S NET FINANCING REQUIREMENTS TO 8% OF GNP IN '87 FM ITS CURRENT LEVEL OF 12%. SIMPLY SERVICING THE PUBLIC DEBT TOOK 23% OF TOTAL PUBLIC EXPENDITURE IN '85. THE SCOPE FOR INCREASING TAX RESOURCES IS LIMITED. BELGIUM ALREADY COLLECTS NEARLY 45% OF GDP IN TAXES, TRAILING ONLY THE SCANDINAVIANS AMONG OECD COUNTRIES. THUS THE PLAN AIMS AT COMPRESSING PUBLIC EXPENDITURE BY REDUCING SOCIAL SECURITY BENEFITS, EDUCATION ASSISTANCE, SUPPORT FOR STATE-OWNED COMPANIES, ETC. THE MAIN FORCE OF THE REDUCTIONS WILL BE FELT DURING 1987 AND IS EXPECTED TO DAMPEN ECONOMIC GROWTH. REAL GNP GROWTH IS PROJECTED AT 1.7% IN '86 FALLING TO 1% IN '87, BELOW THE EUROPEAN AVERAGE. (2.7% - '86, 2.8% - '87). REDUCING THE DEFICIT IS IMPERATIVE AND THERE IS CONFIDENCE THAT MEASURES PLANNED WILL HAVE A SIGNIFICANT DEGREE OF SUCCESS BUT THE VERY SUCCESS WILL HAVE A DEPRESSING EFFECT ON DOMESTIC DEMAND. THE MOST POSITIVE FACTOR IS THE RECOVERY TAKING PLACE IN FIXED PRIVATE INVESTMENT. TO THE EXTENT THAT THIS LEADS TO THE EXPANSION AND MODERNIZATION OF PRODUCTIVE CAPACITY, THE PROSPECTS FOR FASTER GROWTH AND MORE EMPLOYMENT ARE IMPROVED. CDN EXPORTS TO BELGIUM HAVE NOT DONE WELL OVER RECENT YRS, REFLECTING POOR RAW MATERIAL DEMAND AND DEPRESSED COMMODITY PRICES. WITH THE INDUSTRIAL GROWTH EXPECTED OVER THE NEXT YEAR, MODEST IMPROVEMENTS IN VOLUME AND, IN CDN DOLLAR TERMS, ALSO IN VALUE WILL LIKELY OCCUR FOR OUR TRAD'L EXPORTS. THE OPPORT. EXISTS TO DIVERSIFY AND INCREASE SALES OF HIGH VALUE ADDED PRODUCTS, SUCH AS OFFICE AUTOMATION, COMPUTER PERIPHERALS & SOFTWARE, TELCOMS, TRANSP. & MED. EQPT.

Export and Investment Promotion Planning System

REPT: SYN-GEO 87/88 A. Post export program priorities

Region: WESTERN EUROPE

Mission: 414 BRUSSELS

Market: 038 BELGIUM

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

1. 009 FOREST PRODUCTS, EQUIP, SERVICES

REASONS: BELGIUM MAJOR LUMBER IMPORTING CENTRE FOR EUROPE.

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

REASONS: FAST GROWTH/HIGH IMPORT SECTOR. EXCELLENT SCOPE FOR CANADIAN HIGH TECH PRODUCTS/SERVICES.

3. 014 EDUCATION, MEDICAL, HEALTH PROD

REASONS: SPECIFIC SUB-SECTORS IDENTIFIED AS OFFERING GOOD PROSPECTS. WILL BENEFIT FROM CONCENTRATED PROMOTION.

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

1. 009 FOREST PRODUCTS, EQUIP, SERVICES

2. 010 MINE, METAL, MINERAL PROD & SRV

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 414 BRUSSELS

Market: 038 BELGIUM

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

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1600.00M	\$ 1425.00M	\$ 1149.00M	\$ 915.00M
Canadian Exports \$	2.00M	\$ 1.70M	\$ 3.10M	\$ 4.60M
Canadian Share of Import Market	0.13%	0.12%	0.27%	0.50%

Major Competing Countries

	Market Share
i) 577 UNITED STATES OF AMERICA	022 %
ii) 354 NETHERLANDS	014 %
iii) 128 GERMANY WEST	019 %
iv) 112 FRANCE	005 %
v) 051 UNITED KINGDOM	014 %

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

Current status of Canadian exports:

Products/services for which there are
good market prospects

	Current Total Imports In Canadian \$
i) TELECOM	\$ 1.70 M
ii) LOGICIEL	\$ 0.00 M
iii) PRODUITS POUR X-25	\$ 0.00 M

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

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

Export and Investment Promotion Planning System

MISSION: 414 BRUSSELS

COUNTRY: 038 BELGIUM

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

- a lack of interest in the market on the part of Canadian exporters
- the apparent limited sectoral capability in Canada compared to other competing export countries
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- non-tariff protectionist measures which are difficult to overcome

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

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

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

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

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

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

Activity: CREATION D'UNE STRUCTURE PERMETTANT DIFFUSION DU LOGICIEL CANADIENNE EN BELGIQUE AVEC APPUI D'UN MANUFACTURIER ET D'UNE SOCIETE DE DIFFUSION EN BELGIQUE SUPPORTE PAR UNE STRUCTURE SIMILAIRE AU CANADA.

Results Expected: DIFFUSION PLUS LARGE DES LOGICIELS PRINCIPALEMENT DANS LE DOMAINE DE L'EDUCATION.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights

Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 414 BRUSSELS

Market: 038 BELGIUM

Sector: 009 FOREST PRODUCTS, EQUIP, SERVICES

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	588.00M	\$ 604.00M	\$ 594.00M	\$ 587.00M
Canadian Exports \$	38.00M	\$ 41.00M	\$ 37.00M	\$ 42.00M
Canadian Share of Import Market	6.50%	6.80%	6.20%	7.10%

Major Competing Countries

Market Share

i) 128 GERMANY WEST	010 %
ii) 577 UNITED STATES OF AMERICA	008 %
iii) 112 FRANCE	008 %
iv) 504 FINLAND	004 %
v) 507 SWEDEN	002 %

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

Current status of Canadian exports: Mature with little growth

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) WALLCOVERINGS	\$ 1.60 M
ii) SOLID WOOD PANELLING	\$ 0.80 M
iii) HARDWOOD FLOORING	\$ 0.00 M

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

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

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

- non competitive pricing
- other factor(s) described by the Trade Office as follows:

INDUSTRY TO DATE HAS CONCENTRATED ON US MARKET AND SECONDARY MARKET OF AUSTRALIA. SOME PRODUCERS NOW TURNING MORE ATTENTION TO EUROPE RECOGNIZING THIS IS MAJOR COMPETITOR.

Export and Investment Promotion Planning System

MISSION: 414 BRUSSELS

COUNTRY: 038 BELGIUM

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

- strong sectoral capability in Canada

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

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

Activity: TIMBER FRAME CONSTRUCTION TECHNIQUE WILL CONTINUE TO BE AN IMPORTANT SEGMENT OF OUR ACTIVITIES.

Results Expected: INCREASED ACCEPTANCE BY BUILDERS, CONSUMERS, INSURERS, BANKERS.

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

Activity: REVIEW CURRENT SYSTEM, CONSUMER TASTES AND REVIEW GROWTH IN DIV TREND IN MARKET.

Results Expected: INTRODUCTION OF AT LEAST TWO NEW LINE OF HIGH VALUE ADDED WOOD PRODUCTS.

Activity: APPRISE CANADIAN INDUSTRY OF CURRENT STYLES, PATTERNS PRIVING.

Results Expected: BETTER TARGETTED MKG EFFORT BY CDN EXPORTERS.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 414 BRUSSELS

Market: 038 BELGIUM

Sector: 014 EDUCATION, MEDICAL, HEALTH PROD

Subsector: 141 PHARMCEUTICALS & BIOTECHNOLOGY

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	80.00M	\$ 80.00M	\$ 77.00M	\$ 70.00M
Canadian Exports \$	0.00M	\$ 0.00M	\$ 0.00M	\$ 0.00M
Canadian Share of Import Market	0.00%	0.00%	0.00%	0.00%

Major Competing Countries

Market Share

i) 128 GERMANY WEST	030 %
ii) 577 UNITED STATES OF AMERICA	025 %
iii) 112 FRANCE	013 %
iv) 354 NETHERLANDS	010 %
v) 237 ITALY	008 %
vi) 051 UNITED KINGDOM	000 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) CHIMIE CLINIQUE	\$ 0.00 M
ii) IMMUNOCHIMIE	\$ 0.00 M
iii) MICROBIOLOGIE	\$ 0.00 M
iv) HAEMATOLOGIE, HISTOLOGIE CYTOLOGIE	\$ 0.00 M
v) DIAGNOSTIQUE IN VITRO MARCHE VETERINAIRE	\$ 0.00 M
vi) SONDE DNA	\$ 0.00 M
vii) SEMENCES ARTIFICIELLES MAIS, CEREALES	\$ 0.00 M
viii) BIOPESTICIDES/RESISTANCES AUX AGENTS PATHOG.	\$ 0.00 M
ix) BIOHERBICIDES	\$ 0.00 M
x) BIOENGRAIS (FIXATION D'AZOTE)	\$ 0.00 M

Export and Investment Promotion Planning System

MISSION: 414 BRUSSELS

COUNTRY: 038 BELGIUM

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

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

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

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- the apparent limited sectoral capability in Canada compared to other competing export countries
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters
- other factor(s) described by the Trade Office as follows:

PEU D'EFFORT DEPLOYE POUR S'INTRODUIRE SUR LE MARCHE A PART UNE TENTATIVE D'APPROCHE DANS LE CADRE D'EXPOMED 86 ET VISITE AU CDA D'IMPORTANT DISTRIBUTEUR BELGE (INTERNOS) ET VISITE RECENTE EN BELGIQUE D'IAF PRODUCTION INC.

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

- No factors reported by mission

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

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

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

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

Activity: POURSUIVRE CONTACTS AU NIVEAU DES FEDERATIONS ET IMPORTATEURS ET DISTRIBUTEURS BELGES (DIAGNOSTIQUES)

Results Expected: MEILLEURE CONNAISSANCE DU MARCHE.

Activity: RASSEMBLER DOCUMENTATION SUR FIRMES CONCURRENTES LES PLUS IMPORTANTES (DIAGNOSTIQUES)

Results Expected: DETERMINER PRODUITS LES PLUS VENDUS ET ETABLIR NICHES A OCCUPER.

Export and Investment Promotion Planning System

MISSION: 414 BRUSSELS

COUNTRY: 038 BELGIUM

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

Activity: EXPLORER ET AMORCER PARTICIPATION CANADIENNES AVEC FIRMES BELGES DANS LE DOMAINE DE LA BIOTECHNOLOGIE DES PLANTES.

Results Expected: METTRE A PROFIT LES COMPETENCES CANADIENNES DANS LE DOMAINE ET COMMERCILISATION DE R + D CANADIENNE.

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

Activity: ETABLIR LISTE A JOUR DES PRODUCTEURS CANADIENS ET DEVELOPPER CONTACTS AVEC EUX. STIMULER VISITES EN BELGIQUE DE REPRESENTANTS DE PRODUCTEURS CANADIENS. (DIAGNOSTIQUES).

Results Expected: FACILITER APPROCHE DU MARCHE BELGE ET DEVELOPPER CONTACTS DIRECTS ENTRE COMPAGNIES EN VUE DE DISCUSSION SPECIFIQUES.

Activity: DEFINIR MARCHE DU DIAGNOSTIQUE IN VITRO POUR USAGE VETERINAIRE. SUIVRE TENDANCE DU MARCHE A OFFRIR APPAREILLAGE ET TROUSSE DIAGNOSTIQUE DANS UN ENSEMBLE UNIQUE. (DIAGNOSTIQUE).

Results Expected: NICHE DISPONIBLE POUVANT ETRE OCCUPES PAR EXPORTATEUR CANADIEN. PERMETTRE AUX EXPORTATEURS CANADIENS D'AJUSTER LEURS STRATEGIES.

Activity: ETABLIR BASE D'UNE PARTICIPATION CANADIENNE AVEC FIRMES BELGES DANS LE PROJET EUREKA TRAITANT DE LA BIOTECHNOLOGIE DES PLANTES.

Results Expected: TRANSFERT MUTUEL DE TECHNOLOGIE & COMMERCIALISATION DES RESULTATS EN AMERIQUE DU NORD PAR PARTIE CANADIENNE.

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional Projects approved and planned for the coming fiscal year.		
Mission: 414 BRUSSELS		
Sector: 006 ELECTRONICS EQUIP. & SERV		
024 MISSION INCOMING MEDICAL EQUIPMENT MISSION FROM BELGIUM		0487
Sector: 010 MINE, METAL, MINERAL PROD & SRV		
010 FAIRS BATIBOUW SHOW - BRUSSELS, BELGIUM	BRUSSELS	0288
020 MISSION OUTGOING MANUFACTURED WOOD PRODUCTS SEMINAR IN BRUSSELS	BRUSSELS	0587

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 414 BRUSSELS		
Sector: 005 COMM. & INFORM. EQP. & SERV		
010 FAIRS FLANDERS TECHNOLOGY INTERNATIONAL	GHENT	0289
Sector: 009 FOREST PRODUCTS, EQUIP, SERVICES		
010 FAIRS BATIBOUW	BRUSSELS	0389

Export and Investment Promotion Planning System

87/88 Trade and Economic Overview

Mission: 415 HAGUE, THE

Country: 354 NETHERLANDS

THIS YEAR THE DUTCH ECONOMY IS CONTINUING ITS MODEST REAL GROWTH OF 2%. INVESTMENT SHOWS AN ENCOURAGING ACCELERATION. SUBSTANTIAL IMPROVEMENT IN PROFITABILITY AND IN THE FINANCIAL SITUATION OF BUSINESS, TOGETHER WITH A REVIVAL IN CONSUMER DEMAND CLEARLY HAVE HAD THEIR EFFECT. THERE HAS BEEN A STRONG 12.5% INCREASE IN BUSINESS BUILDINGS AND PLANT CONSTRUCTION. REAL AVAILABLE WAGE INCOMES HAVE INCREASED 3% AND RESIDENTIAL CONSTRUCTION SEEMS TO BE TURNING AROUND. INTEREST RATES HAVE MADE IT MORE ATTRACTIVE AGAIN TO BUILD AND TO BUY HOUSES. FOR 1987 THE CENTRAL PLANNING OFFICE FORESEES PRIVATE CONSUMPTION GROWING BY 2.5%, PRIVATE INVESTMENT BY 4.5% AND RESIDENTIAL CONSTRUCTION BY 2%. THEY PREDICT A SHARP FALL IN INVESTMENT IN THE OIL AND GAS SECTOR BUT INVESTMENT IN MACHINERY AND INDUSTRIAL AND COMMERCIAL BUILDINGS WILL CONTINUE TO INCREASE SATISFACTORILY BY APPROX 10%. WITH CONSUMPTION GROWING ONLY SLIGHTLY LESS THAN THIS YEAR AND EXPORTS PICKING UP, PRODUCTION EXCLUSIVE OF ENERGY SHOULD AGAIN INCREASE BY 3% IN 1987. IN SUMMARY: CONTINUING MODEST GROWTH, SOMEWHAT HIGHER OUTSIDE THE ENERGY SECTOR, WITH STRONGLY INCREASING INVESTMENT, FALLING UNEMPLOYMENT, A STILL SIZEABLE BUT DECLINING BALANCE OF PAYMENTS SURPLUS AND VIRTUAL ELIMINATION OF INFLATION. OF COURSE THESE FAVOURABLE EXPECTATIONS ARE BASED ON THE ASSUMPTION THAT THE WORLD ECONOMY WILL CONTINUE TO GROW AT THE PRESENT RATE - OF CRUCIAL IMPORTANCE TO A COUNTRY WHOSE MERCHANDISE EXPORTS, EXPORTS OF SERVICES AND REVENUE FROM A CAPITAL INVESTED ABROAD REPRESENT 70% OF GDP. THE DOLLAR HAS DECLINED SUBSTANTIALLY IN RECENT MONTHS AND BUSINESSMEN ARE NOW LOOKING TO NORTH AMERICA FOR QUALITY PRODUCTS. THE INFORMATICS SECTOR IS BUOYANT - ESTIMATED TO BE GROWING AT 15-20% ANNUALLY - AND THERE ARE GOOD PROSPECTS FOR CANADIAN EXPORTERS OF TELECOMMUNICATION EQUIPMENT, COMPUTER HARD AND SOFTWARE, (MICRO) ELECTRONICS, LABORATORY INSTRUMENTS, AUTOMATION AND PROCESS CONTROL, FOREST PRODUCTS AND SPORTING GOODS. WITH DEMAND EXPANDING AND AVAILABILITY FROM EUROPEAN GROUNDS SHRINKING, MODEST OPPORTUNITIES EXIST FOR CANADIAN FISH SPECIES HITHERTO NOT SOLD TO THE NETHERLANDS, SUCH AS COD AND GREY SOLE.

Export and Investment Promotion Planning System

REPT: SYN-GEO 87/88 A. Post export program priorities

Region: WESTERN EUROPE

Mission: 415 HAGUE, THE

Market: 354 NETHERLANDS

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

1. 007 POWER & ENERGY EQUIP. & SERV.

REASONS: GOOD LIKELIHOOD DUTCH WILL DECIDE IN 1988 TO PROCEED WITH TENDERS FOR TWO NUCLEAR POWER PLANTS.

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

REASONS: INFORMATICS SECTOR IS GROWING AT 20% A YR AND USA HAS 40% OF SOFTWARE MKT. DUTCH ARE MOST NORTH-AMERICA ORIENTED OF ALL CONTINENTAL EUROPEANS. NETHS BOASTS BEST NON-NATIVE ENGLISH SPEAKERS IN EUROPE.

3. 009 FOREST PRODUCTS, EQUIP, SERVICES

REASONS: TIMBER FRAME CONSTRUCTION HAS GAINED LTD ACCEPT. IN NETHS. THERE IS POTENTIAL FOR GREATER MKT SHARE. SPF ALSO USED IN REHABILIT'N WORK. PLY-WOOD USE EXPANDING AS \$ DECLINES. WEST. RED CEDAR GROWING IN POPULARITY

4. 004 DEFENCE PROGRAMS, PRODUCTS, SERV

REASONS: SUBMARINE WARFARE & ELECTRONIC WARFARE, LOW LEVEL IN DEFENCE AND C3 EXPENDITURES BY MILITARY WILL BE SUBSTANTIAL IN COMING YEARS.

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

1. 010 MINE, METAL, MINERAL PROD & SRV
2. 012 PETROCHEM & CHEM PROD, EQP, SERV
3. 009 FOREST PRODUCTS, EQUIP, SERVICES
4. 001 AGRI & FOOD PRODUCTS & SERVICE

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 415 HAGUE, THE

Market: 354 NETHERLANDS

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	805.00M	\$ 767.00M	\$ 730.00M	\$ 664.00M
Canadian Exports \$	15.00M	\$ 8.00M	\$ 26.00M	\$ 27.00M
Canadian Share of Import Market	1.90%	1.00%	3.50%	4.00%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	077 %
ii) 128 GERMANY WEST	015 %
iii) 051 UNITED KINGDOM	005 %
iv) 237 ITALY	001 %

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

Current status of Canadian exports: Well established and growing

Products/services for which there are
good market prospects

Current Total Imports

In Canadian \$

i) SURVEILLANCE DRONES	\$ 0.00 M
ii) ASW AVIONICS FOR NAVY HELICOPTER	\$ 0.00 M
iii) AERIAL TARGETS FOR NAVY	\$ 0.00 M
iv) NBC EQUIPMENT	\$ 0.00 M
v) RADAR SIMULATORS	\$ 0.00 M

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

i) Project Name: MEDIUM OR LONG RANGE RECONNAISSANCE
DRONE (X)

Approximate Value: \$ 24 M

Financing Source:

For further info. please contact:

J. PEARCE, CANADIAN EMBASSY

Export and Investment Promotion Planning System

MISSION: 415 HAGUE, THE

COUNTRY: 354 NETHERLANDS

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

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

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

- No factors reported by mission

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

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- competitive export pricing for this market
- strong sectoral capability in Canada

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

Activity: CONTINUE TO DEVELOP CLOSER CONTACTS WITH SENIOR MILITARY OFFICIALS NOTABLY PROCUREMENT & TECHNICAL STAFF IN NAVY AND ARMY

Results Expected: IMPROVE ACCESS FOR CDN BUSINESSMEN & PRODUCTS TO MORE SENIOR LEVELS THAN WAS PREVIOUSLY THE CASE

Activity: ENHANCE IMAGE OF RELIABILITY OF CDN DEFENCE PRODUCTS THROUGH FOLLOW-UPS WITH PARTIES INVOLVED IN EXISTING CONTRACTS IN WHICH DIFFICULTIES HAVE ARISEN

Results Expected: INCREASE OPPORTUNITY TO BID ON NETHERLANDS DEFENCE REQUIREMENTS

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

Activity: RESEARCH DEVELOPMENT & PRODUCTION STEERING COMMITTEE MEETING IN CANADA IN 1988 AND VISIT BY NETHERLANDS DELEGATION TO A NUMBER OF DEFENCE INDUSTRIES.

Results Expected: MAINTAIN & IMPROVE CONTACTS WITH NETHERLANDS MOD; ALLOW NETHERLANDS OFFICIALS TO SEE NEW DEFENCE PRODUCTS.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 415 HAGUE, THE

Market: 354 NETHERLANDS

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

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	10279.00M	\$ 8566.00M	\$ 6376.00M	\$ 4730.00M
Canadian Exports \$	66.70M	\$ 55.60M	\$ 48.30M	\$ 41.90M
Canadian Share of Import Market	0.65%	0.65%	0.76%	0.89%

Major Competing Countries

Market Share

i) 128 GERMANY WEST	029 %
ii) 606 BENELUX COUNTRIES	013 %
iii) 577 UNITED STATES OF AMERICA	012 %
iv) 051 UNITED KINGDOM	008 %
v) 112 FRANCE	007 %
vi) 265 JAPAN	006 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) COMPUTER HARDWARE	\$ 5198.50 M
ii) COMPUTER SOFTWARE	\$ 339.30 M
iii) TELECOMMUNICATIONS EQUIPMENT	\$ 1065.40 M
iv) ROBOTICS. CAD/CAM	\$ 120.50 M

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

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

- a lack of interest in the market on the part of Canadian exporters
- the unsuitability of Canadian products for this market
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

Export and Investment Promotion Planning System

MISSION: 415 HAGUE, THE

COUNTRY: 354 NETHERLANDS

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

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

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

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

Activity: DISCUSS CANADIAN PARTICIPATION IN EUREKA PROJECTS WITH DUTCH EUREKA SECRETARIAT.

Results Expected: CANADIAN PRIVATE SECTOR PARTICIPATION IN 2 OR 3 EUREKA PROJECTS WITH EUROPEAN PARTNERS.

Activity: VISIT FLANDERS TECHNOLOGY TRANSFER FAIR AND OTHER PROMINENT TRADE FAIRS TO MATCH UP CANADIAN AND DUTCH COMPANIES.

Results Expected: 3-4 LICENSING AGREEMENT JOINT VENTURES OR OTHER FORMS OF INDUSTRIAL COOPERATION.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 415 HAGUE, THE

Market: 354 NETHERLANDS

Sector: 007 POWER & ENERGY EQUIP. & SERV.

Subsector: 073 NUCLEAR

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

Major Competing Countries

Market Share

i) 128 GERMANY WEST

100 %

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

100 \$M AND UP

Current status of Canadian exports:

No Export results to date

Products/services for which there are
good market prospects

Current Total Imports

In Canadian \$

- i) ENGINEERING SERVICES
- ii) NUCLEAR PLANT & EQUIPMENT
- iii) HEAVY WATER
- iv) U/CANDU FUEL

\$	0.00 M
\$	0.00 M
\$	0.00 M
\$	0.00 M

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

- i) Project Name: TWO 900 MWE NUCLEAR POWER PLANTS

Approximate Value: \$ 2500 M

Financing Source: 012 DOM

For further info. please contact:

J. PEARCE, CANADIAN EMBASSY, HAGUE

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

Export and Investment Promotion Planning System

MISSION: 415 HAGUE, THE

COUNTRY: 354 NETHERLANDS

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

- other factor(s) described by the Trade Office as follows:

EXISTING NUCLEAR PLANT IN THE NETHERLANDS UTILIZES GERMAN TECHNOLOGY. THEREFORE, UNTIL CANDU SYSTEM IS SELECTED, CDN EXPORTS WILL BE NON-EXISTENT.

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

- No factors reported by mission

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

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

Activity: WORK WITH AECL OFFICE IN THE HAGUE TO INFLUENCE GVT IN THE SELECTION OF BIDDERS FOR THEIR TWO 900 MWE NUCLEAR POWER PLANTS.

Results Expected: INCLUSION OF AECL ON THE FINAL BIDDERY LIST.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 415 HAGUE, THE

Market: 354 NETHERLANDS

Sector: 009 FOREST PRODUCTS, EQUIP, SERVICES

Subsector: 092 WOOD AND WOOD PRODUCTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1600.00M	\$ 1590.00M	\$ 1555.00M	\$ 1533.00M
Canadian Exports \$	100.00M	\$ 45.00M	\$ 60.00M	\$ 90.00M
Canadian Share of Import Market	6.30%	2.80%	3.90%	5.90%

Major Competing Countries

Market Share

i) 507 SWEDEN	000 %
ii) 577 UNITED STATES OF AMERICA	000 %
iii) 504 FINLAND	000 %
iv) 605 ASIA OR FAR EAST	000 %
v) 553 UNION OF SOVIET SOC REP	000 %

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

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) CLS SPF & SIMILAR	\$ 1.50 M
ii) PLYWOOD	\$ 300.00 M
iii) WEST RED CEDAR	\$ 15.00 M
iv) HEMLOCK	\$ 1.00 M
v) DIY & SEMI MFRD PRODS	\$ 100.00 M
vi) DOUGLAS FIR	\$ 10.00 M
vii) SHINGLES & SHAKES	\$ 0.50 M

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

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

Export and Investment Promotion Planning System

MISSION: 415 HAGUE, THE

COUNTRY: 354 NETHERLANDS

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

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

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

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

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

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

Activity: PLACE STORIES & PHOTOS OF INNOVATIVE HOUSING PROJECTS WITH NETHS ARCHITECTURE & BUILDERS MAGAZINES.

Results Expected: RAISE PROFILE OF TIMBER FRAME CONSTRUCTION.
INCREASE NUMBER OF BUILDERS BELONGING TO
NETHS TFC ASSOCIATION.

Activity: VISIT DO-IT-YOURSELF PRODUCTS IMPORTERS TO IDENTIFY POTENTIAL MARKET NICHEs AND PROVIDE THEM WITH BROCHURES OF PRODUCTS FROM CANADA.

Results Expected: INTRODUCE 3 OR 4 RELIABLE AGENTS OR IMPORTERS
TO CANADIAN FIRMS.

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional Projects approved and planned for the coming fiscal year.		
Mission: 415 HAGUE, THE		
Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV		
010 FAIRS SECURITY EQUIPMENT SHOW,	UTRECHT	0987
020 MISSION OUTGOING DEFENCE IND. CO-OP MISSION TO NETHS-RDP		1087
Sector: 005 COMM. & INFORM. EQP. & SERV		
020 MISSION OUTGOING COMPUTER SOFTWARE MISSION/SEMINAR TO NETHS	UTRECHT	0587
TELECOM EQUIPMENT MISSION TO NETHS	AMSTERDAM	0288
COMPUTER HARDWARE MISSION/SEMINAR TO NETHS	AMSTERDAM	0987
ROBOTICS/CAD/CAM MISSION/SEMINAR TO NETHS	HAGUE	1187
Sector: 006 ELECTRONICS EQUIP. & SERV		
020 MISSION OUTGOING PROCESS CONTROL OR MEDICAL EQUIPMENT MISSION		0887
Sector: 007 POWER & ENERGY EQUIP. & SERV.		
020 MISSION OUTGOING MINT - TO NETHERLANDS - CANDU	HAGUE	0388
EMR MINISTER TO NETHERLANDS - CANDU	HAGUE	0188
024 MISSION INCOMING NETHS POWER UTILITIES MISSION TO CANADA	OTTAWA/TORONTO	0388
NETHERLANDS NUCLEAR SAFETY OFFICIALS TO CANADA	OTTAWA/WHITE SHELL	0787
NETHS ENVIRONMENT & ECON. AFFAIRS MINS TO CDA	OTTAWA/TORONTO	0587
Sector: 009 FOREST PRODUCTS, EQUIP, SERVICES		
020 MISSION OUTGOING TFC MEDIUM DENSITY HOUSING DESIGN SEMINAR	UTRECHT	1087
024 MISSION INCOMING TFC BUILDERS MISSION INNOVATION HOUSING		0687
Sector: 013 CONSUMER PRODUCTS		
024 MISSION INCOMING INCOMING CSGA SHOW		0288
Sector: 016 INDUSTRIAL MACHIN, PLANTS, SERV.		
010 FAIRS INTERCLEAN '87	AMSTERDAM	0987

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional Projects approved and planned for the coming fiscal year.		

Mission: 415 HAGUE, THE

Sector: 016 INDUSTRIAL MACHIN, PLANTS, SERV.

010 FAIRS

INTERCLEAN(CLEANING EQUIPMENT AND SERVICES SHOW, AM AMSTERDAM

0587

Type of Event

Location

Date

Promotional projects proposed for the two following fiscal years.

Mission: 415 HAGUE, THE

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

010 FAIRS

EUROCOMM

AMSTERDAM

0988

Sector: 009 FOREST PRODUCTS, EQUIP, SERVICES

010 FAIRS

BOUWBEURS - TFC & MANUFACTURED WOOD PRODUCTS

UTRECHT

0289

Export and Investment Promotion Planning System

87/88 Trade and Economic Overview

Mission: 422 VIENNA

Country: 026 AUSTRIA

THOUGH THE FALL IN CRUDE OIL PRICES HAS THEORETICALLY IMPROVED THE SHORT-TERM ECONOMIC OUTLOOK FOR MOST INDUSTRIALIZED NATIONS, INCLUDING AUSTRIA, THE BUSINESS UPTURN CYCLE OF THE AUSTRIAN ECONOMY HAS BEEN SOMEWHAT INTERRUPTED IN THE SECOND QUARTER OF 1986. MERCHANDISE EXPORTS, HITHERTO THE DRIVING FORCE, ARE SUFFERING FROM LOW US DOLLAR AND THE FALL IN THE DEMAND FROM OIL EXPORTING COUNTRIES. FURTHERMORE THE GAINS FROM CHEAPER OIL ACCRUING TO AUSTRIAN ECON. ARE ONLY GRADUALLY BEING TRANSFORMED INTO EFFECTIVE DEMAND. THE LATEST SHORT-TERM FORECASTS OF WIFO & IHS, THE LEADING AUSTRIAN ECONOMIC RESEARCH INSTITUTES, ASSUME AN AVERAGE DOLLAR RATE OF AS 15.50 AND AN AVERAGE CRUDE OIL PRICE OF \$16.50 PER BARREL. IN VIEW OF THIS IT IS EXPECTED THAT AUSTRIA'S ENERGY IMPORT BILL WILL FALL THIS YEAR BY AROUND AS 20BN (C\$2 BN APPROX.). IMPORT PRICES WILL FALL BY 3.4% MAINLY BECAUSE OF OIL, WHILE EXPORT PRICE GROWTH WILL BE MARGINAL. THE GNP IN THE FIRST HALF OF 1986 WAS 2% HIGHER THAN A YEAR AGO. HOWEVER THE FACTORS REFERRED TO IN THE FIRST PARAGRAPH WILL CAUSE REVISION OF THE FORECASTED GROWTH IN GNP OF 3% TO APPROX. 2% IN 1986. IT IS BELIEVED THAT DOMESTIC PRIVATE CONSUMPTION WILL PROVIDE THE MAIN SUPPORT FOR FURTHER ECONOMIC EXPANSION AS CONSUMERS WILL GRAD'LY REALIZE THE INCREASE IN THEIR REAL INCOMES. IN THE CIRCUMSTANCES IT IS EXPECTED THAT GNP WILL GROW IN REAL TERMS BY 3% IN 1987, THUS IMPLYING SMALL ACCELERATION FM THE CURRENT YEAR. THE INFLATION RATE IS SHOWING A DOWNWARD TREND MAINLY ON ACC'T OF FALLING IMPORT COSTS. IT IS EXPECTED THAT REAL MERCHANDISE EXPORTS WILL BE AN UPSWING BECAUSE OF STRONG GROWTH IN INVSTMNT IN MACHINERY AND RELATED EGPT. THE FAVOURABLE DOLLAR RATE WILL PARTICULARLY ENCOURAGE IMPORTS OF MODERN TECH. FM THE DOLLAR AREA. INFLATION RATE FOR 1986 IS AROUND 1.5% WHEREAS FORECAST FOR 1987 REPRESENTS A POSSIBLE INCREASE TO 2% AS THE IMPACT OF THE FALL IN IMPORT PRICES IN 1986 WEARS OFF. THE FOREGOING INDICATES THAT AUSTRIAN ECONOMY WILL MAINTAIN ITS MODEST GROWTH IN 1987 WITH SOME POSSIBLE IMPROVEMENT IN IMPORTS OF HITECH ITEMS FROM THE DOLLAR COUNTRIES, INCLUDING CANADA. ALSO PRICE STRUCTURE DOWNWARD TRENDS WOULD INCREASE CONSUMER SPENDING, HENCE ENHANCING POSSIBILITIES FOR THE SALE OF SOME SPECIFIC FOODS AND FISH PRODUCTS FROM CANADA. ANTICIPATED GROWTH IN INVESTMENT IN MACHINERY AND RELATED EQUIPMENT IN AUSTRIA WILL CREATE GOOD OPPORTUNITIES FOR CANADIAN COMPANIES SEEKING TECHNOLOGY TRANSFERS AND JOINT-VENTURES IN THIS SECTOR.

Export and Investment Promotion Planning System

REPT: SYN-GEO 87/88 A. Post export program priorities

Region: WESTERN EUROPE

Mission: 422 VIENNA

Market: 026 AUSTRIA

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

1. 006 ELECTRONICS EQUIP. & SERV

REASONS: AUSTRIAN COMPUT. MKT IS EXPANDING RAPIDLY REQUIRING MORE SOPHISTICATED EQPT., SOME OF IT HOPEFULLY SUPPLIED FM CDA. -MODERNIZ'N OF AUSTRIAN TEL. SYST. WILL OFFER GOOD OPPORT. FOR SELECTED CDN EQPT. AND KNOW-HOW

2. 002 FISHERIES, SEA PRODUCTS & SERV.

REASONS: AUSTRIAN MARKET FOR FRESH-WATER FISH, SALMON, LOBSTER AND CANNED FISH PRODUCTS IS IMPROVING CONSTANTLY.

3. 016 INDUSTRIAL MACHIN, PLANTS, SERV.

REASONS: EXCELLENT OPPORTUNITIES WILL EXIST IN AUSTRIA FOR TECHNOLOGY TRANSFERS, EXCHANGE OF KNOW-HOW AND JOINT-VENTURES IN THIS SECTOR.

4. 001 AGRI & FOOD PRODUCTS & SERVICE

REASONS: AUSTRIAN IMPORT MARKET FOR AGRICULTURAL PRODUCTS IS SIGNIFICANT. CANADIAN SHARE OF THIS MARKET IS SMALL BUT IMPROVING STEADILY.

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

1. 010 MINE, METAL, MINERAL PROD & SRV
2. 009 FOREST PRODUCTS, EQUIP, SERVICES
3. 006 ELECTRONICS EQUIP. & SERV

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 422 VIENNA

Market: 026 AUSTRIA

Sector: 001 AGRI & FOOD PRODUCTS & SERVICE

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	2760.00M	\$ 2590.00M	\$ 2408.00M	\$ 2223.00M
Canadian Exports \$	6.10M	\$ 5.70M	\$ 5.30M	\$ 0.00M NA
Canadian Share of Import Market	0.22%	0.22%	0.22%	0.00% NA

Major Competing Countries

Market Share

i) 609 EUROPEAN COMMON MARKET C	040 %
ii) 607 COMECON	010 %
iii) 616 OTHER COUNTRIES	038 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) FRUITS & VEGETABLES	\$ 808.30 M
ii) GRAINS	\$ 180.10 M
iii) CONFECTIONS	\$ 50.10 M
iv) OIL SEEDS	\$ 22.00 M

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

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

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

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters
- other factor(s) described by the Trade Office as follows:
 1. INCONSISTENT MARKET.
 2. VALUE OF CANADIAN DOLLAR.

Export and Investment Promotion Planning System

MISSION: 422 VIENNA

COUNTRY: 026 AUSTRIA

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

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

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

Activity: SERVICING CONSTANTLY INCREASING MARKET ENQUIRIES FROM CANADIAN COMPANIES IN SEEDS, OILSEEDS & PULSES.

Results Expected: INCREASE OF CANADIAN SALES.

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

Activity: INTENSIFY PERSONAL CALLS ON MAJOR AUSTRIAN IMPORTERS & DISTRIBUTORS IN THE AGRICULTURE & FOOD SECTOR.

Results Expected: IMPROVE LOCAL AWARENESS ABOUT CANADIAN SUPPLIERS' CAPABILITY.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 422 VIENNA

Market: 026 AUSTRIA

Sector: 002 FISHERIES, SEA PRODUCTS & SERV.

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	130.00M	\$ 119.00M	\$ 108.00M	\$ 100.00M
Canadian Exports \$	1.00M	\$ 0.95M	\$ 0.85M	\$ 0.00M NA
Canadian Share of Import Market	0.76%	0.79%	0.78%	0.00% NA

Major Competing Countries

Market Share

i) 609 EUROPEAN COMMON MARKET C	037 %
ii) 607 COMECON	003 %
iii) 616 OTHER COUNTRIES	032 %

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

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) CANNED FISH	\$ 56.50 M
ii) FISH PREPAR. INCL. CAVIAR	\$ 51.70 M
iii) FRESH FISH	\$ 48.40 M
iv) CROSTACEANS	\$ 9.90 M
v) DRIED FISH	\$ 4.80 M

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

- the degree of import duty protection of local industry tends to be moderate

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters
- other factor(s) described by the Trade Office as follows:
 1. INCONSISTENT MARKET.
 2. VALUE OF CANADIAN DOLLAR.

Export and Investment Promotion Planning System

MISSION: 422 VIENNA

COUNTRY: 026 AUSTRIA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- use of Canadian Government export promotion activities
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: CONTINUE OUR EFFORTS IN DEVELOPING AUSTRIAN MARKET FOR FRESH WATER FISH, SALMON, LOBSTER & CANNED FISH PRODUCTS.

Results Expected: INCREASE OF CANADIAN SALES.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: INTENSIFY PERSONAL CALLS ON MAJOR AUSTRIAN IMPORTERS AND DISTRIBUTORS IN THE FISHERIES SECTOR.

Results Expected: IMPROVE LOCAL AWARENESS ABOUT CANADIAN SUPPLIERS' CAPABILITIES.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 422 VIENNA

Market: 026 AUSTRIA

Sector: 005 COMM. & INFORM. EQP. & SERV

Subsector: 052 WORKPLACE AUTOMATION

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1200.00M	\$ 1150.00M	\$ 1100.00M	\$ 900.00M
Canadian Exports \$	15.20M	\$ 14.00M	\$ 10.70M	\$ 13.70M
Canadian Share of Import Market	1.26%	1.21%	0.97%	1.52%

Major Competing Countries

Market Share

i) 128 GERMANY WEST	034 %
ii) 577 UNITED STATES OF AMERICA	026 %
iii) 265 JAPAN	012 %
iv) 237 ITALY	008 %

Cumulative 3 year export potential for CDN products
in this Sector/Subsector: 30-60 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) COMPUTERS & PARTS	\$ 8.80 M
ii) OFFICE MACHINES & PARTS	\$ 1.90 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters
- other factor(s) described by the Trade Office as follows:
LACK OF MARKET KNOWLEDGE AND PROPER FOLLOW-UP BY CANADIAN EXPORTERS.

Export and Investment Promotion Planning System

MISSION: 422 VIENNA

COUNTRY: 026 AUSTRIA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: TO INCREASE CANADIAN COMPANIES' PRESENCE IN THIS MARKET.

Results Expected: ESTABLISHMENT OF NEW BUYING CONNECTIONS AND THEREFORE INCREASE IN SALES.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: TO ATTEND INTERNATIONAL EXHIBITION & SYMPOSIA OUTSIDE OF POST TERRITORY.

Results Expected: PERSONAL CONTACTS AND INCREASE IN KNOWLEDGE OF STATE-OF-ART IN THIS SECTOR.

Activity: TO INCREASE NUMBER OF PERSONAL CALLS ON POTENTIAL AUSTRIAN CUSTOMERS AND/OR TECHNOLOGY TRANSFER SEEKERS.

Results Expected: INCREASE OF AWARENESS IN CANADIAN CAPABILITIES IN THIS AREA AND CONSEQUENTLY POTENTIAL INCREASES IN SALES.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 422 VIENNA

Market: 026 AUSTRIA

Sector: 005 COMM. & INFORM. EGP. & SERV

Subsector: 053 TELECOMMUNICATIONS (INC SPACE)

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	730.00M	\$ 710.00M	\$ 700.00M	\$ 690.00M
Canadian Exports \$	3.50M	\$ 3.00M	\$ 2.70M	\$ 2.80M
Canadian Share of Import Market	0.48%	0.42%	0.39%	0.40%

Major Competing Countries

Market Share

i) 128 GERMANY WEST	041 %
ii) 265 JAPAN	018 %
iii) 354 NETHERLANDS	003 %
iv) 237 ITALY	003 %
v) 507 SWEDEN	003 %

Cumulative 3 year export potential for CDN products
in this Sector/Subsector: 5-15 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are
good market prospects

Current Total Imports
In Canadian \$
\$ 2.80 M

i) TELECOMMUNICATIONS EGPT.

Projects or portion of projects which are still in the planning
stage and for which Canadian companies might have reasonable prospects.

i) Project Name: MODERNIZATION OF AUSTRIAN TELEPHONE
SYSTEM

Approximate Value: \$ 2500 M

Financing Source: 012 DOM

For further info. please contact:

R. J. ROSSI, 0043-222/63-36-91

Export and Investment Promotion Planning System

MISSION: 422 VIENNA

COUNTRY: 026 AUSTRIA

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be moderate
- approval of technical standards can present problems in the case of some imported products

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- non-tariff protectionist measures which are difficult to overcome
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

- sourcing assistance from Canadian federal/provincial governments departments

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: TO INCREASE CANADIAN COMPANIES PRESENCE IN AUSTRIAN MARKET.

Results Expected: NEW BUYING CONNECTIONS, AGENCIES, ETC. HENCE INCREASE IN EXPORTS.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: TO ATTEND INTERNATIONAL EXHIBITIONS, SYMPOSIA, CONVENTIONS ETC. OUTSIDE OF POST TERRITORY.

Results Expected: TO ESTABLISH PERSONAL CONTACTS AND INCREASE KNOWLEDGE OF STATE-OF-ART IN THIS SECTOR.

Export and Investment Promotion Planning System

MISSION: 422 VIENNA

COUNTRY: 026 AUSTRIA

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: TO INCREASE NUMBER OF PERSONAL CALLS ON POTENTIAL AUSTRIAN CUSTOMERS AND/OR TECHNOLOGY TRANSFER SEEKERS.

Results Expected: INCREASE OF AWARENESS IN CDN CAPABILITIES IN THIS AREA AND CONSEQUENTLY POTENTIAL INCREASE IN SALES.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 422 VIENNA

Market: 026 AUSTRIA

Sector: 016 INDUSTRIAL MACHIN. PLANTS, SERV.

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	7700.00M	\$ 7600.00M	\$ 7594.00M	\$ 6114.00M
Canadian Exports \$	12.40M	\$ 11.00M	\$ 8.60M	\$ 9.50M
Canadian Share of Import Market	0.16%	0.14%	0.11%	0.15%

Major Competing Countries

Market Share

i) 128 GERMANY WEST	052 %
ii) 512 SWITZERLAND	008 %
iii) 237 ITALY	008 %
iv) 577 UNITED STATES OF AMERICA	007 %

Cumulative 3 year export potential for CDN products
in this Sector/Subsector: 15-30 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) WOODLAND LOG HANDLING EQUIPMENT	\$ 3.60 M
ii) HEATING, PUMPS, COMPRESSORS	\$ 2.00 M
iii) ELECTRICAL APPARATUS & MACHINERY	\$ 2.70 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low
- approval of technical standards can present problems in the case of some imported products

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- the apparent limited sectoral capability in Canada compared to other competing export countries
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters
- other factor(s) described by the Trade Office as follows:

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Export and Investment Promotion Planning System

MISSION: 422 VIENNA

COUNTRY: 026 AUSTRIA

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- use of Canadian Government export promotion activities

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

- sourcing assistance from Canadian federal/provincial governments departments

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: TO CREATE COMPREHENSIVE LIST OF AUSTRIAN MANUFACTURERS AND DISTRIBUTORS OF CNC MACHINES; AFTER ITS COMPLETION TO COMMENCE WITH THE APPROACH TO CDN MANUFACTURERS AIMED AT ALL POSSIBLE FORMS OF COOPERATIVE EFFORTS.

- Results Expected:
- RECIPROCITY IN REPRESENTATION
 - TECHNOLOGY TRANSFER
 - MANUFACTURING UNDER LICENSE.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: WITH ACQUISITION OF DATA PROCESSOR, DEVELOP CONTACT SYSTEM LIST ON SECTORAL BASIS FOR CANADIAN COMPANIES.

- Results Expected: ESTABLISH COMPREHENSIVE SOURCING NETWORK FOR USE OF CANADIAN EXPORTERS.

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional Projects approved and planned for the coming fiscal year.		
Mission: 422 VIENNA		
Sector: 002 FISHERIES, SEA PRODUCTS & SERV.		
020 MISSION OUTGOING FISH MARKETING MISSION	VIENNA	1187
Sector: 006 ELECTRONICS EQUIP. & SERV		
020 MISSION OUTGOING THIRD COUNTRY TRADING OPPORTUNITIES MISSION TO EU COUNTERTRADE MISSION TO EUROPE	VIENNA VIENNA	0288 0987
Sector: 016 INDUSTRIAL MACHIN, PLANTS, SERV.		
020 MISSION OUTGOING TECHNOLOGY MISSION TO AUSTRIA (ENVIRONMENT PROTECT	VIENNA	0587
Sector: 999 MULTIPLE SECTORS		
020 MISSION OUTGOING MISSION TO DEVELOP 3RD COUNTRY TRADING OPPORT./LDC	VIENNA	0487
024 MISSION INCOMING FEDERAL CHAMBER OF COMMERCE MISSION TO CANADA		0087

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 422 VIENNA		
Sector: 001 AGRI & FOOD PRODUCTS & SERVICE		
020 MISSION OUTGOING SEEDS MISSION TO AUSTRIA	VIENNA	0588
Sector: 006 ELECTRONICS EQUIP. & SERV		
010 FAIRS IFABO - OFFICE AUTOMATION SOFTWARE FAIR	VIENNA	0588
020 MISSION OUTGOING SOFTWARE MISSION	VIENNA	0688
Sector: 999 MULTIPLE SECTORS		
020 MISSION OUTGOING TECHNOLOGY EXCHANGE MISSION	VIENNA	0488

Export and Investment Promotion Planning System

87/88 Trade and Economic Overview

Mission: 423 BONN

Country: 128 GERMANY WEST

WEST GERMAN ECONOMIC GROWTH IN 1987, ESTIMATED AT 3%, WILL BE AMONGST THE BEST OF ALL OECD ECONOMIES. STIMULUS FOR GROWTH HAS SHIFTED FROM EXPORTS TO DOMESTIC DEMAND. THE INCREASE IN VALUE OF DM IS THE MAIN REASON. WITH GERMAN DOMESTIC DEMAND INCREASING AT ANNUAL RATE OF 5%, INCREASED IMPORT DEMAND IS BEING GENERATED. WEST GERMAN IMPORTS HAVE BEEN INCREASING IN REAL TERMS AT A RATE OF 4.5% AND ARE FORECAST TO GROW AT A 5.5% RATE IN 1987. THE GERMAN PROPENSITY TO IMPORT AND THE SHARP DEPRECIATION OF THE CANADIAN DOLLAR IN RELATION TO THE DM SUGGESTS CANADIAN EXPORTS TO WEST GERMANY WILL GROW IN 1987. THE FRG IMPORT MARKET SHOULD AMOUNT TO SOME C\$350 BILLION IN 1987. CANADA'S PRESENT SHARE OF THIS MARKET IS LESS THAN 1%. GERMAN TOURISM TO CANADA, ALSO INFLUENCED BY THE DM/DLR RELATIONSHIP, IS ALREADY SHOWING STRONG SIGNS OF PICKING UP. THIS SHOULD CONTINUE THROUGH 1987. HIGH PROFIT LEVELS OF GERMAN COMPANIES IN RECENT YEARS HAVE LED TO A STRONG DOMESTIC INVESTMENT TENDENCY. FOREIGN INVESTMENT IS A MAJOR AIM OF MANY GERMAN FIRMS WHICH, BECAUSE OF THEIR RECENT GOOD BALANCE SHEET PERFORMANCE, WILL BE IN A STRONGER POSITION TO PURSUE THEIR FOREIGN INVESTMENT INTEREST. FOR CANADA THIS IMPLIES CONTINUING GOOD POTENTIAL, ALTHOUGH USA IS A VERY STRONG COMPETITOR FOR GERMAN INVESTMENT IN NORTH AMERICA. NEW FRG DIRECT INVESTMENT ABROAD IN 1986 WILL HAVE AMOUNTED TO SOME C\$7.6 BILLION.

Export and Investment Promotion Planning System

REPT: SYN-GEO 87/88 A. Post export program priorities

Region: WESTERN EUROPE

Mission: 423 BONN

Market: 128 GERMANY WEST

The Mission selected the following sectors as priority areas for export promotion activities for the coming fiscal year:

1. 004 DEFENCE PROGRAMS, PRODUCTS, SERV

REASONS: CO-OPERATIVE R&D PROGRAM WITH GERMAN MINISTRY OF DEFENCE CREATES NEW DEFENCE SALES OPPORTUNITIES.

2. 001 AGRI & FOOD PRODUCTS & SERVICE

REASONS: GOOD OPPORTUNITIES FOR ANIMAL PRODUCTS AND BREEDING STOCK.

3. 005 COMM. & INFORM. EGP. & SERV

REASONS: RAPIDLY GROWING MARKET IN FRG FOR HARDWARE AND SOFTWARE. BONN IS RESPONSIBLE FOR LIAISON WITH BUNDESPOST, MUNICH HAS PRIME POST PROMOTIONAL RESPONSIBILITY.

4. 008 TRANSPORT SYS, EQUIP, COMP, SERV.

REASONS: CANADIAN AVIATION PRODUCTS WELL ACCEPTED IN FRG. ENGINES AND AIR-FRAMES, BUSINESS PROSPECTS EXIST.

The most important current Canadian export sectors to this market are (based on actual export sales):

1. 004 DEFENCE PROGRAMS, PRODUCTS, SERV

2. 001 AGRI & FOOD PRODUCTS & SERVICE

3. 008 TRANSPORT SYS, EQUIP, COMP, SERV.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 423 BONN

Market: 128 GERMANY WEST

Sector: 001 AGRI & FOOD PRODUCTS & SERVICE

Subsector: 018 FEED, FERTILIZER & VET PRODUCTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1500.00M	\$ 1400.00M	\$ 1393.00M	\$ 1414.00M
Canadian Exports \$	35.00M	\$ 30.00M	\$ 27.00M	\$ 27.00M
Canadian Share of Import Market	2.30%	2.10%	2.00%	1.90%

Major Competing Countries

Market Share

i) 609 EUROPEAN COMMON MARKET C	000 %
ii) 577 UNITED STATES OF AMERICA	000 %
iii) 607 COMECON	000 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 60-100 \$M

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects

Current Total Imports

i) FURS (NOT GARMENTS)	In Canadian \$
ii) GAME	\$ 1060.00 M
iii) BOVINE SEMEN	\$ 120.00 M
	\$ 12.00 M

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

i) Project Name: GERMAN AGRIC. CONSULTING/AID PROJ. IN 3RD COUNTRIES(LIVESTOCK BREEDING, MACH. ETC.

Approximate Value: \$ M

Financing Source: 011 CIDA

For further info. please contact:

CIDA, CANADIAN EMBASSY BONN

Export and Investment Promotion Planning System

MISSION: 423 BONN

COUNTRY: 128 GERMANY WEST

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- there are import restrictions which can present significant problems
- the degree of import duty protection of local industry tends to be moderate

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- non-tariff protectionist measures which are difficult to overcome
- other factor(s) described by the Trade Office as follows:
EC AND GERMAN VETERINARY REGULATIONS.

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: INCREASE AWARENESS OF CANADIAN BEEF AND DAIRY CATTLE BY DISTRIBUTION OF NEW PR MATERIAL TO GERMAN BREEDERS.

Results Expected: MORE SEMEN AND LIVESTOCK SALES.

Activity: DAIRY TECHNOLOGY EXCHANGE BETWEEN CANADIAN AND GERMAN DAIRIES IN THE FRESH MILK PRODUCTS SECTOR.

Results Expected: NEW PRODUCTS/TECHNOLOGIES FOR CANADIAN DAIRIES AND CONSUMERS.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: INCREASE AWARENESS OF GERMAN ELECTRONIC STATE OF THE ART HERDBOOK MANAGEMENT SYSTEMS IN CANADA.

Results Expected: PRODUCTIVITY INCREASE, COST SAVINGS IN CANADA, IMPROVEMENT OF INTL COMPETITIVENESS OF CDN INDUSTRY SECTOR.

Export and Investment Promotion Planning System

MISSION: 423 BONN

. COUNTRY: 128 GERMANY WEST

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: PROVIDE INPUT FOR ASSESSMENT OF COOPERATION POTENTIAL BETWEEN CANADA AND FRG IN FOOD PROCESSING TECHNOLOGY, ESP. MEAT AND DAIRY SECTOR.

Results Expected: CHANGE FROM COMMODITY TO TECHNOLOGY TRANSFER WITH RESULTS AS 7-8.1

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 423 BONN

Market: 128 GERMANY WEST

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import)	\$ 25000.00M	\$22766.00M	\$18338.00M	\$19448.00M
Canadian Exports	\$ 115.00M	\$ 98.00M	\$ 97.50M	\$ 62.40M
Canadian Share of Import Market	0.46%	0.43%	0.53%	0.32%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	010 %
ii) 051 UNITED KINGDOM	001 %
iii) 112 FRANCE	001 %
iv) 237 ITALY	001 %
v) 038 BELGIUM	001 %
vi) 128 GERMANY WEST	086 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) AIRCRAFT (COMPLETED AIRFRAMES)	\$ 90.00 M
ii) AIRCRAFT COMPONENT	\$ 15.00 M
iii) MARINE COMPONENTS	\$ 8.00 M
iv) ELECTRONICS (SIMULATORS)	\$ 5.00 M
v) ELECTRONICS (EW)	\$ 5.00 M
vi) AVIONICS	\$ 5.00 M
vii) ORDNANCE	\$ 3.00 M

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

- i) Project Name: NEW EUROPEAN FRIGATE
- Approximate Value: \$ 3500 M
- Financing Source: 025 OTHER
- For further info. please contact:
S. BUCHANAN (613)996-0665

Export and Investment Promotion Planning System

MISSION: 423 BONN

COUNTRY: 128 GERMANY WEST

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

ii) Project Name: NEW EUROPEAN FIGHTER JET

Approximate Value: \$ 4600 M

Financing Source: 025 OTHER

For further info. please contact:

J. PAGNUTTI (613)996-1758

iii) Project Name: PRECISION GUIDED WEAPONS

Approximate Value: \$ 1200 M

Financing Source: 025 OTHER

For further info. please contact:

K. BARNABY (613)996-0639

iv) Project Name: MODULAR STANDOFF WEAPON

Approximate Value: \$ 1200 M

Financing Source: 025 OTHER

For further info. please contact:

A. CAMPBELL (613)996-4205

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- non competitive pricing
- the apparent limited sectoral capability in Canada compared to other competing export countries
- difficulties of adaptation of marketing techniques to the market by some Canadian companies

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- strong sectoral capability in Canada
- the existence of a bilateral economic/trade arrangement between Canada and this country

Export and Investment Promotion Planning System

MISSION: 423 BONN

COUNTRY: 128 GERMANY WEST

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

- sourcing assistance from Canadian federal/provincial governments departments
- product/service information from Canadian companies

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: FOLLOW-UP ON DEFENCE TRADE/INVESTMENT MISSION TO CANADA, SPRING 86

Results Expected: JOINT VENTURES, TECH TRANSFER, BUYING CONNECTIONS.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: IDENTIFICATION OF REPRESENTATIVES AND COMPANY BUYING CONNECTIONS

Results Expected: INCREASE IN TRADE OPPORTUNITIES.

Activity: SURVEY OF MARKET POSSIBILITIES FOR SECURITY RELATED PRODUCTS.

Results Expected: IDENTIFICATION OF OPPORTUNITIES TO PENETRATE MARKET.

Activity: LONGER RANGE IDENTIFICATION OF MAJOR DEFENSE PROJECTS.

Results Expected: EARLY CORPORATE LINKAGES IN R & D PHASE. WILL IMPROVE ABILITY TO B & D AND SUCCEED.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 423 BONN

Market: 128 GERMANY WEST

Sector: 005 COMM. & INFORM. EQP. & SERV

Subsector: 055 BROADCASTING (INC CATV)

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	240.00M	\$ 200.00M	\$ 170.00M	\$ 135.00M
Canadian Exports \$	0.00M NA	\$ 0.00M NA	\$ 0.00M NA	\$ 0.00M NA
Canadian Share of Import Market	0.00% NA	0.00% NA	0.00% NA	0.00% NA

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	020 %
ii) 265 JAPAN	015 %
iii) 112 FRANCE	012 %
iv) 051 UNITED KINGDOM	010 %
v) 354 NETHERLANDS	008 %
vi) 237 ITALY	007 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 5-15 \$M

Current status of Canadian exports: No Export results to date

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) DESCRAMBLERS FOR PAY TV	\$ 0.00 M
ii) STUDIO EQUIPMENT	\$ 0.00 M
iii) SATELLITE RECEIVERS & ANTENNAS	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low
- approval of technical standards can present problems in the case of some imported products

Export and Investment Promotion Planning System

MISSION: 423 BONN

COUNTRY: 128 GERMANY WEST

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- the apparent limited sectoral capability in Canada compared to other competing export countries
- non-tariff protectionist measures which are difficult to overcome
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- No factors reported by mission

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: CONTINUE CORPORATE LIAISON ACTIVITIES TO KEEP ABREAST OF EMERGING OPPORTUNITIES IN CATV SECTOR, PARTICULARLY NOW THAT PRIVATIZATION OF BROADCASTING IN RFA IS INCREASING.

Results Expected: EARLY INVOLVMENT OF CATV SUPPLIERS IN PROCUREMENT PROGRAMS OF BAVARIAN T.V. ORGANIZATIONS.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 423 BONN

Market: 128 GERMANY WEST

Sector: 008 TRANSPORT SYS, EQUIP, COMP, SERV.

Subsector: 081 AUTOMOTIVE

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	8133.00M	\$ 8000.00M	\$ 7071.50M	\$ 6122.70M
Canadian Exports \$	15.30M	\$ 14.70M	\$ 16.50M	\$ 10.60M
Canadian Share of Import Market	0.19%	0.18%	0.23%	0.17%

Major Competing Countries

Market Share

i) 609 EUROPEAN COMMON MARKET C	059 %
ii) 112 FRANCE	021 %
iii) 051 UNITED KINGDOM	015 %
iv) 026 AUSTRIA	013 %
v) 237 ITALY	010 %
vi) 606 BENELUX COUNTRIES	007 %

Cumulative 3 year export potential for CDN products
in this Sector/Subsector: 30-60 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) (HAND) TOOLS	\$ 0.00 M
ii) DO-IT-YOURSELF CAR REPAIR & MAINTENANCE EQUIPMENT	\$ 0.00 M
iii) SERVICE EQUIPMENT	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be moderate
- approval of technical standards can present problems in the case of some imported products

Export and Investment Promotion Planning System

MISSION: 423 BONN

COUNTRY: 128 GERMANY WEST

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- non-tariff protectionist measures which are difficult to overcome
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- support provided by the PEMD program
- participation in trade fairs
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: INCREASE AWARENESS BY DISTRIBUTION OF (NEW) PR MATERIAL TO GERMAN CAR PARTS IMPORT CONSORTIUMS.

Results Expected: MORE SALES.

Activity: INCREASE FOREIGN AWARENESS OF CANADIAN INTERNATIONAL AUTOMOTIVE SHOW (ORGANIZED BY AIA).

Results Expected: MORE SALES.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: PROVIDE INPUT FOR ASSESSMENT OF QUESTION, IF CANADIAN CAR PART MANUFACTURERS, INSTEAD OF EXPORTING EX CANADA, SHOULD NOT HAVE OWN DISTRIBUTING AGENT IN FRG.

Results Expected: CLOSER VICINITY TO MARKET/CONSTANT REPRESENTATION COULD RESULT IN HIGHER SALES ON AFTER-MARKET AND POSSIBLY TO CAR MANUFACTURERS.

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional Projects approved and planned for the coming fiscal year.		
Mission: 423 BONN		
Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV		
020 MISSION OUTGOING OUTGOING DEFENCE TRADE AND INVESTMENT MISSION		0388
Sector: 005 COMM. & INFORM. EQP. & SERV		
010 FAIRS BIG TECH	BERLIN	1187
Sector: 008 TRANSPORT SYS, EQUIP, COMP, SERV.		
020 MISSION OUTGOING AUTO PARTS MISSION TO GERMANY AND SWEDEN		0987
Sector: 013 CONSUMER PRODUCTS		
010 FAIRS FRANKFURT BOOK FAIR	FRANKFURT	0987
Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 423 BONN		
Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV		
010 FAIRS SECURITY 88	ESSEN	0988
Sector: 005 COMM. & INFORM. EQP. & SERV		
010 FAIRS BIG TECH	BERLIN	1188
INTERKAMA	DUESSELDORF	1089
BIG TECH	BERLIN	1189
Sector: 008 TRANSPORT SYS, EQUIP, COMP, SERV.		
010 FAIRS AUTOMEKANICA	FRANKFURT	0988
Sector: 013 CONSUMER PRODUCTS		
010 FAIRS FRANKFURT BOOK FAIR	FRANKFURT	0988

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 423 BONN		
Sector: 013 CONSUMER PRODUCTS		
010 FAIRS FRANKFURT BOOK FAIR	FRANKFURT	0989
Sector: 014 EDUCATION, MEDICAL, HEALTH PROD		
010 FAIRS BIOTECKNICA	HANNOVER	0988
BIOTECKNICA	HANNOVER	0989

Export and Investment Promotion Planning System

87/88 Trade and Economic Overview

Mission: 424 DUSSELDORF

Country: 128 GERMANY WEST

NORTH RHINE WESTPHALIA (NRW) IS GERMANY'S LARGEST PROVINCE (17,000,000), THE TRADITION'L IND'L OF GERMANY, HAVING A FULLY DVLPD TRANSP. SYST. & IND'L INFRASTRUCTURE. DESPITE ECON. ADJUST. & A GREATER SHARING OF ECON. STRENGTH WITH BADENWURTEMBERG & BAVARIA, NRW REMAINS A ECON. FORCE & A TARGET MKT FOR CDN EXPTRS. OF TOTAL GERMAN FOREIGN TRADE, 30% CAN BE IDENTIFIED AS INVOLVING NRW. IN '85, APPROX. 39% OF ALL CDN EXPTS TO GERMANY (C-\$1.0 BN BY GERMAN STATS) FOUND A MKT IN NRW. FIVE OF GERMANY'S LARGEST CORPS ARE HQ'D IN THIS PROV. & THE TOP 25 LOCAL CORPS WILL APPEAR IN A LISTING OF GERMANY'S TOP 65 FIRMS. DDORF IS GERMANY'S SECOND FI-NANCIAL CENTRE BEING THE HQ'S FOR WESTDEUTSCHE LANDESBANK, THE COUNTRY'S THIRD LARGEST BANK. THESE FACTS ARE OF SPECIAL RELEVANCE TO OUR THIRD COUNTRY COOP. & INVSTMT PROMOTION ACTIVITIES. WITH PRIME POST RESPONSIBILITIES, WE ENJOY A FULL RANGE OF SECTOR INVOLVEMENT. THIRD COUNTRY COOP. PROD. SUBSTANTIAL BENEFITS, BUT OVER TIME (THE RECENT US-\$60 MILL SUCCESS OF KLOCKNER STADTLER HURTER ON KAMALIA IN N. PAKISTAN HAD ITS GENESIS AT THIS POST). THROUGH A COMMUNIC'N PRG. WITH CDN IDUSTRY, WE WILL TRY TO INVOLVE MORE POTENTIAL CDN PRTNRS IN DIRECT PROMO'N IN GERMANY. IN '85, FOREIGN TURNOVER FOR THE LARGE GERMAN PROJ. COS WAS DM 13.3BN (C-\$9.5 BN). COUPLE THIS FIGURE WITH THE EDC '85 ANNUAL REPORT FIGURE OF C-\$6.8 BN OF CDN EXPORT TRANSACTIONS & WE HAVE THE BUSINESS VOLUME TO SUPPORT PRTNRSHIPS, SHARED RISKS & OPPORT. THE GERMAN TRADE FAIR IS AN EXCELLENT VEHICLE FOR MKT PENETRATION, NOT ONLY IN GERMAN BUT ON OTHER MKTS AS WELL. THEY ARE ALSO USEFUL SHOWCASES FOR INVSTMT PROSPECTING SURVEYS. IN COLOGNE & DDORF WE HAVE TWO OF THE BEST ORGANIZED & MOST ACTIVE TRADE FAIR ORGANIZATIONS IN THE COUNTRY. IF WE CAN ATTRACT SUFFICIENT CDN CO. PART., IN COOP. WITH THE PROV., WE WILL BOOST CDN EXPTS. (OUR 1989 - 90 TOTAL LIST WILL ENCOMPASS MORE THAN 50 SHOWS). WE WILL EXPAND OUR ACTIVITY IN THE CONSUMER GDS SECTOR TO INCLUDE FURS & HOME TEXTILES. THIS RESULTS FM PRG. ADJ. AT THE EMBASSY & THE ADD'NS COMPLEMENT OUR CURRENT RANGE OF RESPONSIBILITIES. THE ENERGY FILE HAS A SOMEWHAT DIMINISHED PRIORITY DUE TO THE OIL PRICE CRASH OF '86. HOWEVER, GERMANY HAS A NAT'L PREOCCUPATION WITH ENERGY SEC'TY & WE WILL CONTINUE OUR EFFORTS TO BUILD COOP & INVSTMT OPPORT. INVOLVING RUHRKOHLE, VEBA, RUHRGAS, & DEMINEX. THE LIVELY NUCLEAR ENERGY DEBATE ONGOING IN GERMANY WILL BE THE SUBJ. OF POST REPORTING AS A RESULT OF LIAISON VISITS. THE ENERGY PRICE PENDULUM WILL EVENT'LY SWING BACK TOWARDS HIGHER PRICES & CDA REMAINS AN ATTRACTIVE INVSTMT MKT FOR THE MAJOR GERMAN COS. THE GERMAN STEEL IND'RY REMAINS CENTRED IN NRW & THESE COS PRESENT OPPORTS FOR CDN RESOURCE SUPPLIERS. WHERE CDA CAN COMBINE PRICE COMPETITIVENESS TO THE TRADIT'NAL MKTG. STRENGTHS OF QUALITY & SEC'TY OF SUPPLY, THIS MKT CLD BE EXPANDED.

27/02/87

DEPARTMENT OF EXTERNAL AFFAIRS

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REPT: SYN-GEO 87/88 A. Post export program priorities

Region: WESTERN EUROPE

Mission: 424 DUSSELDORF

Market: 128 GERMANY WEST

The Mission selected the following sectors as priority areas for export promotion activities for the coming fiscal year:

1. 016 INDUSTRIAL MACHIN, PLANTS, SERV.

REASONS: -QUALITY -PRICE COMPETITIVE -SPECIALIZED END PRODUCTS (PRINTING MACHINERY, PROCESSING MACHINERY)

2. 015 CONSTRUCTION INDUSTRY

REASONS: -HIGH TECHNICAL SPECIFICATIONS - PRICE COMPETITIVE -EDC FINANCING -TARGET MARKET DEBT PROBLEMS (RISK-SHARING)

3. 013 CONSUMER PRODUCTS

REASONS: -BETTER MATCHING CDN SUPPLY/GERMAN DEMAND -QUALITY -MARKET ACCEPTABILITY -PRICE COMPETITIVE.

4. 010 MINE, METAL, MINERAL PROD & SRV

REASONS: -QUALITY AND RELIABLE SUPPLY -PRICE COMPETITIVE, CURRENCY FLUCTUATIONS -REDUCTION OR TERMINATION OF EUROPEAN SUBSIDIES.

The most important current Canadian export sectors to this market are (based on actual export sales):

1. 010 MINE, METAL, MINERAL PROD & SRV
2. 013 CONSUMER PRODUCTS
3. 016 INDUSTRIAL MACHIN, PLANTS, SERV.
4. 015 CONSTRUCTION INDUSTRY

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 424 DUSSELDORF

Market: 128 GERMANY WEST

Sector: 010 MINE, METAL, MINERAL PROD & SRV

Subsector: 102 MINERALS AND MINERAL PRODUCTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	3063.00M	\$ 2918.10M	\$ 7861.00M	\$ 6343.00M
Canadian Exports \$	159.60M	\$ 152.00M	\$ 412.00M	\$ 537.00M
Canadian Share of Import Market	5.10%	5.20%	5.30%	8.50%

Major Competing Countries

Market Share

i) 609 EUROPEAN COMMON MARKET C	080 %
ii) 607 COMECON	015 %
iii) 614 SOUTH AMERICA	002 %
iv) 577 UNITED STATES OF AMERICA	001 %
v) 616 OTHER COUNTRIES	001 %

Cumulative 3 year export potential for CDN products
in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Market share declining

Products/services for which there are
good market prospects

Current Total Imports

	In Canadian \$
i) ZINC	\$ 141.00 M
ii) COAL	\$ 38.00 M
iii) LEAD	\$ 19.30 M
iv) COPPER	\$ 18.30 M
v) MOLYBDENUM	\$ 18.20 M
vi) TUNGSTEN	\$ 10.40 M
vii) COBALT	\$ 0.50 M

The Trade Office reports that the following factors influence Canadian
export performance in this market for this sector (sub-sector).

- there are import restrictions which can present significant problems
- the degree of import duty protection of local industry tends to be high

Export and Investment Promotion Planning System

MISSION: 424 DUSSELDORF

COUNTRY: 128 GERMANY WEST

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- high tariffs
- non-tariff protectionist measures which are difficult to overcome

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: UNDERTAKE A COMPREHENSIVE MARKET STUDY FOR MINERALS

Results Expected: MORE IN DEPTH KNOWLEDGE OF THE SECTOR WILL ENABLE POST TO TARGET ACTIVITIES AND INCREASE MARKET SHARE 2 TO 3%

Activity: UNDERTAKE A COMPREHENSIVE MARKET STUDY FOR THERMAL AND METALLURGICAL COAL.

Results Expected: BETTER KNOWLEDGE OF SHIFTS IN ENERGY SOURCES AND COMPETITION WILL ENABLE CDN SUPPLIERS TO INCREASE MARKET BY 1 TO 2%.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: MEET WITH MAJOR METAL TRADING COMPANIES TO STIMULATE INTEREST IN CANADIAN METAL PRODUCTION.

Results Expected: INCREASED EXPORTS THROUGH INCOMING MISSION FROM CANADA IN ZINC, LEAD, NICKEL, MOLYBDENUM, PLATINUM AND COBALT SECTORS.

Export and Investment Promotion Planning System

MISSION: 424 DUSSELDORF

COUNTRY: 128 GERMANY WEST

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: MEET WITH MAJOR MINING COMPANIES TO INTEREST THEM IN CO-PARTICIPATION IN CANADIAN MINING OPERATIONS.

Results Expected: INCREASED DIRECT INVESTMENT BY ORGANIZING MISSIONS TO CANADA IN FOLLOWING SECTORS: GOLD, PLATINUM, NICKEL, COPPER.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 424 DUSSELDORF

Market: 128 GERMANY WEST

Sector: 013 CONSUMER PRODUCTS

Subsector: 134 LEISURE PROD. TOOLS HARDWARE

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1390.00M	\$ 1324.00M	\$ 2550.00M	\$ 0.00M NA
Canadian Exports \$	9.00M	\$ 3.60M	\$ 5.00M	\$ 0.00M NA
Canadian Share of Import Market	0.64%	0.27%	0.20%	0.00% NA

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	009 %
ii) 112 FRANCE	010 %
iii) 051 UNITED KINGDOM	009 %
iv) 265 JAPAN	006 %

Cumulative 3 year export potential for CDN products
in this Sector/Subsector: 5-15 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) LEISURE PRODUCTS	\$ 0.90 M
ii) HARDWARE PRODUCTS	\$ 0.40 M
iii) TOOLS	\$ 2.30 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be moderate
- approval of technical standards can present problems in the case of some imported products

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- other factor(s) described by the Trade Office as follows:
LACK OF FOLLOW UP BY CANADIAN EXPORTER AFTER FIRST CONTACT WITH IMPORTER AT TRADE FAIR OR SIMILAR MARKETING ACTIVITIES.

Export and Investment Promotion Planning System

MISSION: 424 DUSSELDORF

COUNTRY: 128 GERMANY WEST

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada
- the availability of competitive Canadian financing

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: MEET WITH MAJOR IMPORTERS AND DISTRIBUTORS TO CREATE MORE INTEREST IN CANADIAN TOOL AND HARDWARE PRODUCTS.

Results Expected: GREATER AWARENESS OF CANADIAN MADE COMPETITIVE PRODUCTS.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 424 DUSSELDORF

Market: 128 GERMANY WEST

Sector: 015 CONSTRUCTION INDUSTRY

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	9000.00M	\$10000.00M	\$ 9400.00M	\$ 7900.00M
Canadian Exports \$	200.00M	\$ 150.00M	\$ 100.00M	\$ 60.00M
Canadian Share of Import Market	2.20%	1.50%	1.06%	0.75%

Major Competing Countries

Market Share

i) 265 JAPAN	000 %
ii) 237 ITALY	000 %
iii) 112 FRANCE	000 %
iv) 051 UNITED KINGDOM	000 %
v) 577 UNITED STATES OF AMERICA	000 %

Cumulative 3 year export potential for CDN products
in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports:

Products/services for which there are
good market prospects

Current Total Imports

	In Canadian \$
i) PULP AND PAPER	\$ 330.00 M
ii) ENERGY PROSPECTS	\$ 914.00 M
iii) METALLURGICAL	\$ 1400.00 M
iv) MINING	\$ 450.00 M
v) PETROCHEM/OIL & GAS	\$ 1430.00 M

Projects or portion of projects which are still in the planning
stage and for which Canadian companies might have reasonable prospects.

i) Project Name: ASTRAKHAN II (WITH MANNESMANN)

Approximate Value: \$ 350 M

Financing Source: 023 EDC

For further info. please contact:

THOMAS MARR 0211/353471

ii) Project Name: ARGENTINE PIPELINE PROJECT(WITH PLE)

Approximate Value: \$ 900 M

Financing Source: 023 EDC

For further info. please contact:

THOMAS MARR 0211/353471

Export and Investment Promotion Planning System

MISSION: 424 DUSSELDORF

COUNTRY: 128 GERMANY WEST

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- exports of certain products or services to this country are subject to Canadian export controls

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- the apparent limited sectoral capability in Canada compared to other competing export countries
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- non-tariff protectionist measures which are difficult to overcome
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada
- the availability of competitive Canadian financing

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: WILL CONTINUE TO SIGNAL POST'S THIRD COUNTRY COOPERATION RESPONSIBILITIES/OPPORTUNITIES TO CMA AND ASSOCIATION OF CANADIAN CONSULTING ENGINEERS.

Results Expected: NEW ENQUIRIES FROM CANADIAN COMPANIES INTERESTED IN THIRD MARKET COOPERATION WITH GERMAN COMPANIES.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: LIAISON CALLS ON ALL MAJOR GERMAN COMPANIES INVOLVED IN THIRD COUNTRY CAPITAL PROJECTS.

Results Expected: DEFINITION OF AREAS FOR COOPERATION, SEVERAL BUYING CONNECTIONS AND A FEW MULTI-MILLION DOLLAR SUB-CONTRACTS

Export and Investment Promotion Planning System

MISSION: 424 DUSSELDORF

COUNTRY: 128 GERMANY WEST

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: REPORT ON GERMAN TRADING HOUSES

Results Expected: ADD CANADIAN COMPANIES TO POTENTIAL BIDDERS LIST

Activity: TAILOR-MADE ITINERARIES FOR VISITING CANADIAN COMPANIES.

Results Expected: GREATER AWARENESS OF CDN SUPPLY CAPABILITIES-
EVENTUAL EXPORTS IN PARTNERSHIP WITH FRG
COMPANIES.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 424 DUSSELDORF

Market: 128 GERMANY WEST

Sector: 016 INDUSTRIAL MACHIN. PLANTS, SERV.

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import)	\$ 26000.00M	\$25700.00M	\$25968.00M	\$21958.00M
Canadian Exports	\$ 85.00M	\$ 78.00M	\$ 72.00M	\$ 65.00M
Canadian Share of Import Market	0.34%	0.30%	0.30%	0.30%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	015 %
ii) 265 JAPAN	012 %
iii) 112 FRANCE	011 %
iv) 237 ITALY	010 %
v) 512 SWITZERLAND	010 %
vi) 051 UNITED KINGDOM	008 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) OFFICE/INFORMATION	\$ 32.00 M
ii) PRECISION TOOLS	\$ 8.00 M
iii) RUBBER/PLASTICS	\$ 4.00 M
iv) CONSTRUCTION	\$ 3.00 M
v) PRINTING/PAPER	\$ 5.00 M
vi) MACHINE DRIVES	\$ 5.00 M
vii) PACKAGING	\$ 1.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be moderate
- approval of technical standards can present problems in the case of some imported products

Export and Investment Promotion Planning System

MISSION: 424 DUSSELDORF

COUNTRY: 128 GERMANY WEST

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- the apparent limited sectoral capability in Canada compared to other competing export countries
- difficulties of adaptation of marketing techniques to the market by some Canadian companies

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada
- the availability of competitive Canadian financing

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: MEETINGS WITH CANADIAN MANUFACTURERS IN CANADA BY POST OFFICER.

Results Expected: GAIN FURTHER KNOWLEDGE ON CDN CAPABILITIES AND INFORM INDUSTRY ABOUT "HOW TO PENETRATE FRG MARKET".

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: CONTINUE INDIVIDUAL MEETINGS WITH GERMAN FIRMS TO INCREASE LICENSING AND JOINT VENTURE OPPORTUNITIES. MEETINGS WITH GERMAN MFRS IN RESPONSE TO DRIE PRIORITIES AND CDN COMPANY REQUESTS.

Results Expected: TO BRING TECHNOLOGY TO CANADA AND TO INCREASE CANADIAN COMPETITIVENESS ON WORLD MARKETS.

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional Projects approved and planned for the coming fiscal year.		
Mission: 424 DUSSELDORF		
Sector: 001 AGRI & FOOD PRODUCTS & SERVICE		
010 FAIRS ANUGA	COLOGNE	1087
Sector: 006 ELECTRONICS EQUIP. & SERV		
010 FAIRS SECURITY	MUNICH	1187
Sector: 010 MINE, METAL, MINERAL PROD & SRV		
010 FAIRS MEDICA INT'L CONG. & EXH. ,	DUESSELDORF, W. GERM. (DUESSELDORF	1187
Sector: 013 CONSUMER PRODUCTS		
010 FAIRS INT'L FURNITURE FAIR, COLOGNE	COLOGNE	0188
Sector: 016 INDUSTRIAL MACHIN, PLANTS, SERV.		
010 FAIRS DOMOTECHNICA INT'L TRADE FAIR (HOUSEHOLD APPAREL)	COLOGNE	0288
Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 424 DUSSELDORF		
Sector: 001 AGRI & FOOD PRODUCTS & SERVICE		
010 FAIRS ANUGA	COLOGNE	1089
Sector: 006 ELECTRONICS EQUIP. & SERV		
010 FAIRS SECURITY	ESSEN	1088
Sector: 009 FOREST PRODUCTS, EQUIP, SERVICES		
010 FAIRS P'88	DUSSELDORF	0588
Sector: 010 MINE, METAL, MINERAL PROD & SRV		
010 FAIRS MEDICA INT'L CONG. & EXH. ,	DUESSELDORF	1188

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 424 DUSSELDORF		
Sector: 010 MINE, METAL, MINERAL PROD & SRV		
010 FAIRS MEDICA INT'L CONG. & EXH., DUESSELDORF	DUESSELDORF	1089
Sector: 013 CONSUMER PRODUCTS		
010 FAIRS		
FUR FAIR	FRANKFURT	0488
EQUITANA	ESSEN	0289
MEN'S FASHION WEEK/INTERJEANS	COLOGNE	0289
PHOTOKINA	COLOGNE	0988
GARDEN	COLOGNE	0988
SPOGA	COLOGNE	0988
INT'L FRANKFURTER MESSE	FRANKFURT	0289
SPOGA	COLOGNE	0989
GARDEN	COLOGNE	0989
INT'L FRANKFURTER MESSE	FRANKFURT	0290
MEN'S FASHION WEEK/INTERJEANS	COLOGNE	0290
HARDWARE	COLOGNE	0390
IGEDO	DUSSELDORF	0390
INT'L FRANKFURT MESSE	FRANKFURT	0888
MEN'S FASHION WEEK/INTERJEANS	COLOGNE	0888
HARDWARE FAIR	COLOGNE	0389
IGEDO	DUSSELDORF	0389
FUR FAIR	FRANKFURT	0489
INTERZUM	COLOGNE	0589
INT'L FRANKFURTER MESSE	FRANKFURT	0889
MEN'S FASHION WEEK/INTERJEANS	COLOGNE	0889
IGEDO	DUSSELDORF	0989
Sector: 014 EDUCATION, MEDICAL, HEALTH PROD		
010 FAIRS		
MEDICA	DUSSELDORF	1089
INTERHOSPITAL	DUSSELDORF	0389
MEDICA	DUSSELDORF	1188

Export and Investment Promotion Planning System

87/88 Trade and Economic Overview

Mission: 425 HAMBURG

Country: 128 GERMANY WEST

TRADE AND ECONOMIC OVERVIEW: AN OVERVIEW FOR GERMANY AS A WHOLE HAS BEEN INCLUDED IN THE REPORT BY THE EMBASSY, BONN AND IT SHOULD BE READ IN CONJUNCTION WITH THIS REGIONAL REPORT.

NORTHERN GERMANY WITH ABOUT 22% OF THE COUNTRY'S POPULATION CONTINUES TO PLAY A DYNAMIC PART IN THE NAT'L ECON. HAMBURG IS THE MAJOR ECON. CENTER AND IS THE LARGEST CITY IN THE FRG OUTSIDE OF BERLIN. THE OTHER AREA OF MAJOR ECON. IMPORTANCE IS HANNOVER.

UNDER OUR PRIME-POST SYSTEM, THE HAMBURG POST HAS COUNTRY-WIDE RESPONSIBILITIES FOR CERTAIN PROD. SECTORS. THE MOST IMPORTANT OF THEM-AGRICULTURAL PRODS, FISH AND FOOD PRODS, FORESTRY PRODS, MARINE AND OCEAN IND. AND THE CHEMICALS AND PLASTICS SECTORS - COMPRISED OVER 68% IN VALUE OF OUR EXPORTS TO THE FRG IN 1985. SOME FACTS ABOUT HAMBURG REFLECTING ITS ROLE IN THE NORTH ARE ATTACHED FOR INFORMATION. FOR CDA OUR EXPORTS IN THE PRIME-POST SECTORS REMAIN OF VITAL IMPORTANCE AND WE HOPE TO EXPAND THE SPECTRUM OF OUR EXPORTS WITHIN THESE SECTORS TO INCLUDE MORE VALUE-ADDED PRODS (I.E. WOOD CUT FOR DOOR AND WINDOW FRAMES, PROCESSED FISH PRODS, ETC.). WE ALSO HAVE A VERY LARGE BUSINESS COMMUNITY IN CDA WHO ARE INTERESTED TO DEVELOP THIS MARKET, SO WE HAVE THE ESSENTIAL ELEMENTS FOR EXPANSION. WE PLAY AN ACTIVE ROLE IN PROMOTION OF INVESTMENT AND TECHNOLOGY ACQUISITION THROUGH THE STAND WE ORGANIZE WITH THE PROVINCES AT THE HANNOVER FAIR. MOST OF THE PROVINCES REGARD THIS SHOW AS CENTRAL TO THEIR INVESTMENT PROMOTION EFFORTS IN GERMANY AND RELY ON THE HAMBURG POST TO ORGANIZE AND PUBLICIZE PARTICIPATION. THIS WORK HAS TAKEN ON ENHANCED IMPORTANCE WITH THE INTENSIFIED PROGRAM TO ATTRACT NEW INVESTORS.

IN ADDITION TO THE FOCUS ON OUR PRIME-POST SECTORS AND INVESTMENT, WE ALSO COMMIT SIGNIFICANT RESOURCES TO PROMOTION OF SECTORS OF GREATEST OPPORTUNITY IN SUPPORT OF OTHER POSTS. THIS IS ESPECIALLY THE CASE FOR THE HIGH TECHNOLOGY SECTOR, WHERE WE LEND MAJOR SUPPORT TO THE CEBIT SHOW (OFFICE TECHNOLOGIES) IN HANNOVER AND IN THE MEDIA SECTOR, WHERE HAMBURG IS THE GERMAN CENTER.

A NEW AND IMPORTANT WORKLOAD WILL BE ADDED TO THE POST AS WE BECOME MORE AND MORE INVOLVED IN THE CANADIAN SUBMARINE ACQUISITION PROJECT (CASAP) AND THE NATO FRIGATE PROGRAM. POTENTIAL CANADIAN PRIME CONTRACTORS WILL INCREASINGLY SEEK OUR ASSISTANCE TO ESTABLISH BUSINESS CONTACTS WITH GERMAN SUPPLIERS OF SUBMARINE AND NAVAL SHIP COMPONENTS AND SUB-SYSTEMS. THE CASAP DEMANDS A PROVEN PRODUCT SO THIS WILL INCLUDE CONSIDERABLE NEGOTIATIONS FOR LICENSING IN MANY CASES. SOME PRELIMINARY CONTACTS HAVE ALREADY BEEN MADE WITH THE POST AND WE EXPECT THESE TO VERY MUCH INTENSIFY OVER THE NEXT 12 TO 18 MONTHS.

Export and Investment Promotion Planning System

REPT: SYN-GED 87/88 A. Post export program priorities

Region: WESTERN EUROPE

Mission: 425 HAMBURG

Market: 128 GERMANY WEST

The Mission selected the following sectors as priority areas for export promotion activities for the coming fiscal year:

1. 009 FOREST PRODUCTS, EQUIP. SERVICES

REASONS: CONTINUING EFFORTS TO LOWER COST OF HOUSING, INCLUDING MORE OPEN ATTITUDE TO BUILDING STANDARDS, ARE LEADING MORE BUILDERS TO SWITCH TO TIMBER-FRAME CONSTRUCTION.

2. 002 FISHERIES, SEA PRODUCTS & SERV.

REASONS: PER-CAPITA CONSUMPTION OF FISH IS INCREASING WHILE THE DOMESTIC CATCH IS DECREASING.

3. 001 AGRI & FOOD PRODUCTS & SERVICE

REASONS: THE AFFLUENCE OF THE WEST GERMAN ECONOMY CONTRIBUTES TO A GOOD MARKET FOR SPECIALTY FOOD ITEMS.

4. 015 CONSTRUCTION INDUSTRY

REASONS: HERE OUR FOCUS IS ON HOUSING AND THE PRODUCTS, IN ADDITION TO LUMBER, THAT ARE REQUIRED.

5. 005 COMM. & INFORM. EQP. & SERV

REASONS: INTROD'N OF PRIV. BROADCASTING & PAY T. V. & THE EXPANSION OF THE CABLE NETWORK WILL LEAD TO ADD'L OPPORTUNITIES. ALSO A LARGE MKT FOR OFFICE EQUIPMENT AND SOFTWARE.

The most important current Canadian export sectors to this market are (based on actual export sales):

1. 009 FOREST PRODUCTS, EQUIP. SERVICES
2. 003 GRAINS AND OILSEEDS
3. 001 AGRI & FOOD PRODUCTS & SERVICE
4. 002 FISHERIES, SEA PRODUCTS & SERV.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 425 HAMBURG

Market: 128 GERMANY WEST

Sector: 001 AGRI & FOOD PRODUCTS & SERVICE

Subsector: 012 HORTICULTURE (FRUIT, VEG, FLOR)

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import)	\$ 20000.00M	\$20000.00M	\$20200.00M	\$18800.00M
Canadian Exports	\$ 7.50M	\$ 7.00M	\$ 4.00M	\$ 8.40M
Canadian Share of Import Market	0.04%	0.04%	0.02%	0.04%

Major Competing Countries

Market Share

i) 609 EUROPEAN COMMON MARKET C.	58 %
ii) 616 OTHER COUNTRIES	21 %
iii) 620 EUROPE	18 %
iv) 607 COMECON	3 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 15-30 \$M

Current status of Canadian exports: Mature with little growth

Products/services for which there are good market prospects

Current Total Imports In Canadian \$	
i) BLUEBERRIES, FROZEN	\$ 4.00 M
ii) VEGETABLES, FROZEN	\$ 1.50 M
iii) FRUITS & VEGETABLES, FRESH	\$ 0.75 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be moderate

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- other factor(s) described by the Trade Office as follows:

SOME PROD. ARE CROP DEPENDENT & CAN ONLY COMPETE WHEN EUROPEAN PROD. NOT READILY AVAILABLE (BLUEBERRIES, WAXED BEANS). CAP IS A MAJOR BARRIER THROUGH COMPLEX IMPORT CONTROLS & SUBSIDIES IT EXCLUDES MOST AG PROD. FOR MKT EXCEPT WHERE EUR. PROD'N CANNOT SUPPLY.

Export and Investment Promotion Planning System

MISSION: 425 HAMBURG

COUNTRY: 128 GERMANY WEST

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: ESTABLISH ADDITIONAL BUYING CONTACTS THROUGH VISITING FAIRS (IKOFA, MUNICH; SIAL, PARIS)

Results Expected: INCREASED AWARENESS OF CANADA'S POTENTIAL AS SUPPLIER OF HIGH CLASS FOOD PRODUCTS.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: IDENTIFY AND QUALIFY CANADIAN SUPPLIERS OF PRODUCTS WHICH COULD FIND A NICHE IN THE GERMAN MARKET.

Results Expected: BROADEN THE NUMBER OF POTENTIAL SUPPLIERS.

Activity: IDENTIFY NEW CHANNELS OF DISTRIBUTION FOR CANADIAN PRODUCTS. (I.E. FROZEN FOOD HOME SERVICE INDUSTRY).

Results Expected: INCREASED IMPORTS FROM CANADA.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 425 HAMBURG

Market: 128 GERMANY WEST

Sector: 001 AGRI & FOOD PRODUCTS & SERVICE

Subsector: 013 SEEDS & SPECIAL CROPS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	2950.00M	\$ 2900.00M	\$ 2838.00M	\$ 3015.00M
Canadian Exports \$	8.00M	\$ 7.80M	\$ 7.40M	\$ 5.20M
Canadian Share of Import Market	0.30%	0.30%	0.30%	0.20%

Major Competing Countries

Market Share

i) 609 EUROPEAN COMMON MARKET C	79 %
ii) 620 EUROPE	7 %
iii) 607 COMECON	6 %
iv) 616 OTHER COUNTRIES	8 %

Cumulative 3 year export potential for CDN products
in this Sector/Subsector: 15-30 \$M

Current status of Canadian exports: Mature with little growth

Products/services for which there are
good market prospects

i) DRIED LENTILS

Current Total Imports

In Canadian \$

\$ 8.00 M

The Trade Office reports that the following factors influence Canadian
export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be moderate

In the Trade Office's opinion, Canadian export performance in this sector
(sub-sector) in this market is lower than optimum mainly because of:

- non competitive pricing
- other factor(s) described by the Trade Office as follows:
CANADIAN INSPECTION STANDARDS ARE SOMETIMES UNEVEN.

Export and Investment Promotion Planning System

MISSION: 425 HAMBURG

COUNTRY: 128 GERMANY WEST

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade fairs
- participation in trade missions
- use of provincial governments export promotion activities
- competitive export pricing for this market

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: SUPPORT CDN EXPORTERS AND GERMAN IMPORTERS IN THEIR ATTEMPT TO ESTABLISH NEW AND TO EXPAND EXISTING BUSINESS. RESPOND TO INQUIRIES RECEIVED AND FIND MOST SUITABLE PARTNERS.

Results Expected: EXPANSION OF EXISTING BUSINESS THROUGH BETTER AWARENESS OF CANADA'S POTENTIAL

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ESTABLISH NEW AND RE-ESTABLISH OLD CONTACTS IN PULSES PROCESSING INDUSTRY AND TRY TO SOLVE OCCASIONAL PROBLEMS WITH GRADING PRACTICES.

Results Expected: MORE CONFIDENCE IN CANADIAN GRADING STANDARDS WILL RESULT IN INCREASED SALES OF LENTILS AND OTHER PULSES.

Activity: HOLD RECEPTION IN COOPERATION WITH CDN PULSES MARKETING BOARD FOR GERMAN PULSES TRADE WITH FILM DEMONSTRATION OF CANADA'S POTENTIAL AND RESEARCH WORK DONE IN THIS SECTOR IN HAMBURG.

Results Expected: RAISE THE PROFILE OF CDN PULSES INDUSTRY AND DEMONSTRATE STRONG BILATERAL RELATIONSHIP BETWEEN RESEARCHERS IN THIS SECTOR

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 425 HAMBURG

Market: 128 GERMANY WEST

Sector: 001 AGRI & FOOD PRODUCTS & SERVICE

Subsector: 015 SEMI & PROCESSED FOOD & DRINK

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	260.00M	\$ 255.00M	\$ 257.00M	\$ 235.00M
Canadian Exports \$	9.00M	\$ 8.00M	\$ 7.30M	\$ 6.80M
Canadian Share of Import Market	4.00%	3.00%	2.80%	2.90%

Major Competing Countries

Market Share

i) 616 OTHER COUNTRIES	48 %
ii) 609 EUROPEAN COMMON MARKET C	36 %
iii) 607 COMECON	14 %
iv) 620 EUROPE	2 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 15-30 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) CANNED CORN	\$ 2.30 M
ii) HONEY	\$ 2.20 M
iii) MAPLE SYRUP	\$ 1.40 M
iv) ALCOHOLIC BEVERAGES	\$ 1.10 M
v) WILD RICE	\$ 0.30 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be moderate

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- other factor(s) described by the Trade Office as follows:

LIMITING FACTOR IS THE CAP. FOR EXEMPLE, THE PRODUCTION OF SUGAR IS SUPPORTED AT ABOUT DOUBLE THE WORLD PRICE, THE DUTIES ON ANY IMPORTS WITH A SUGAR CONTENT MUST BE KEPT HIGH TO PROTECT LOCAL PRODUCERS WHO ARE FORCED TO USE EXPENSIVE EUROPEAN SUGAR.

Export and Investment Promotion Planning System

MISSION: 425 HAMBURG

COUNTRY: 128 GERMANY WEST

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- Canada's position as one of the few major sources of international supply

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: SEARCH FOR NEW DISTRIBUTION CHANNELS FOR FROZEN FOODS IN CONSUMER PACKS (HOME SERVICE) AS ADDITIONAL OUTLET FOR CDN PRODS IN THIS S SECTOR BY VISITING LEADING FIRMS & MAKING THEM AWARE OF CANADA'S POTENTIAL.

Results Expected: INCREASED SALES OF 10% P. A. TO A MARKET SEGMENT WITH GROWTH POTENTIAL.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: IDENTIFY ADDITIONAL BUYERS FOR CANNED CORN, HONEY AND MAPLE SYRUP.

Results Expected: INCREASED SALES

Activity: IDENTIFY NEW SUPPLIERS OF THE ABOVE WILLING TO SUPPLY THIS MARKET ON A CONTINUOUS BASIS.

Results Expected: INCREASED NUMBER OF CDN FIRMS ACTIVE IN THIS MARKET.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 425 HAMBURG

Market: 128 GERMANY WEST

Sector: 002 FISHERIES, SEA PRODUCTS & SERV.

Subsector: 021 FISH & SHELLFISH & OTHER PROD

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	980.00M	\$ 850.00M	\$ 820.00M	\$ 755.00M
Canadian Exports \$	26.00M	\$ 24.00M	\$ 21.30M	\$ 13.90M
Canadian Share of Import Market	3.00%	2.80%	2.60%	1.80%

Major Competing Countries

Market Share

i) 616 OTHER COUNTRIES	039 %
ii) 609 EUROPEAN COMMON MARKET C	039 %
iii) 620 EUROPE	019 %
iv) 607 COMECON	003 %

Cumulative 3 year export potential for CDN products
in this Sector/Subsector: 60-100 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) SALMON, FROZEN	\$ 5.40 M
ii) LIVE LOBSTER	\$ 4.40 M
iii) HERRING	\$ 3.50 M
iv) FRESHWATER FISH	\$ 2.90 M
v) COD	\$ 2.30 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be moderate

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- other factor(s) described by the Trade Office as follows:
LIMITED INTEREST BY GERMAN IMPORTERS(EXCEPT RECENTLY WHEN \$ HAS BEEN LOW VIS-A-VIS THE DM)& DOMINATION OF U.S. INTERESTS HAVE REDUCED INTEREST ON CDN SIDE. THE EXCEPTION IS HIGH-PROFIT/VALUE SECTORS(I. E. LOBSTER)WHERE BUSINESS CONTROLLED BY IMPORTERS.

Export and Investment Promotion Planning System

MISSION: 425 HAMBURG

COUNTRY: 128 GERMANY WEST

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: CONTINUE PREPARATION OF FISH FACT SHEETS DESCRIBING THE GERMAN MARKET FOR SELECTED SPECIES.

Results Expected: MAKE CDN SUPPLIERS AWARE OF OPPORTUNITIES AND DISTRIBUTION CHANNELS.

Activity: INITIATE DIALOGUE WITH FIMA, GERMAN FISH MARKETING AGENCY RE JOINT PROMOTIONAL CAMPAIGN HIGH-LIGHTING CANADIAN FISH.

Results Expected: SALES INCREASE BY 10% PER YEAR.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 425 HAMBURG

Market: 128 GERMANY WEST

Sector: 002 FISHERIES, SEA PRODUCTS & SERV.

Subsector: 022 PROCESSED FISH & SHELLFISH

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	320.00M	\$ 300.00M	\$ 300.00M	\$ 280.00M
Canadian Exports \$	2.80M	\$ 2.50M	\$ 3.00M	\$ 2.30M
Canadian Share of Import Market	0.90%	0.80%	1.00%	0.80%

Major Competing Countries

Market Share

i) 616 OTHER COUNTRIES	039 %
ii) 609 EUROPEAN COMMON MARKET C	039 %
iii) 620 EUROPE	019 %
iv) 607 COMECON	003 %

Cumulative 3 year export potential for CDN products
in this Sector/Subsector: 60-100 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) SALMON ROE, FROZEN	\$ 0.60 M
ii) CANNED LOBSTER & LOBSTER MEAT	\$ 1.00 M
iii) HERRING, DRESSED	\$ 0.80 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be high

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- other factor(s) described by the Trade Office as follows:

LIMITED INTEREST BY GERMAN IMPORTERS(EXCEPT RECENTLY WHEN \$ HAS BEEN LOW VIS-A-VIS THE DM) HIGHER TARIFFS THAT PROTECT PROCESSED FISH MARKETS & DOMINATION OF U.S. INTERESTS HAVE COMBINED TO REDUCE INTEREST ON CDN SIDE.

Export and Investment Promotion Planning System

MISSION: 425 HAMBURG

COUNTRY: 128 GERMANY WEST

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: CONTINUE PREPARATION OF FISH FACT SHEETS DESCRIBING THE GERMAN MARKET FOR SELECTED SPECIES.

Results Expected: MAKE CDN SUPPLIERS AWARE OF OPPORTUNITIES AND DISTRIBUTION CHANNELS.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 425 HAMBURG

Market: 128 GERMANY WEST

Sector: 003 GRAINS AND OILSEEDS

Subsector: 032 OILSEEDS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	4800.00M	\$ 5000.00M	\$ 5572.00M	\$ 4813.00M
Canadian Exports \$	120.00M	\$ 1120.00M	\$ 103.70M	\$ 141.60M
Canadian Share of Import Market	2.50%	2.40%	1.90%	2.90%

Major Competing Countries

Market Share

i) 609 EUROPEAN COMMON MARKET C	55 %
ii) 616 OTHER COUNTRIES	40 %
iii) 607 COMECON	4 %
iv) 620 EUROPE	1 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Mature with little growth

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) FLAX SEED	\$ 80.00 M
ii) MUSTARD SEED	\$ 3.00 M
iii) SUNFLOWER SEED	\$ 3.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- there are import restrictions which can present significant problems
- the degree of import duty protection of local industry tends to be high

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- high tariffs
- non-tariff protectionist measures which are difficult to overcome
- other factor(s) described by the Trade Office as follows:

SOME AGRIC PROD FALL UNDER EEC MARKET REGULATION & PRODUCTION IS SUBSIDIZED. EEC'S GOAL TO BE SELF-SUFFICIENT TENDS TO DECREASE OUR MKT POTENTIAL AS EEC AG. OFFICIALS ENCOURAGE EXPANSION TO REDUCE IMPORTS & PRODUCTION OF SURPLUS ITEMS.

Export and Investment Promotion Planning System

MISSION: 425 HAMBURG

COUNTRY: 128 GERMANY WEST

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- competitive export pricing for this market
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: CONTINUOUS DIALOGUE WITH IMPORTERS & CRUSHERS OF OIL FRUITS FOR THE PURPOSE OF INCREASING POST AWARENESS OF EEC CROP RESULTS AND TO KEEP UP-DATED KNOWLEDGE ON POSSIBILITIES FOR CDN. SUPPLIERS.

Results Expected: INCREASED SALES IN THE SECTORS OF RAPEFLAX, SUNFLOWER AND MUSTARD SEEDS.

Activity: SUPPORT CANADIAN FIRMS IN THEIR ATTEMPT TO MAINTAIN EXISTING AND ESTABLISHED NEW CONTACTS.

Results Expected: EXPAND CONTACT BASE

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ENCOURAGE MARKET LEADERS IN THIS FIELD TO ATTEND ANNUAL GRAIN AND OILSEED COURSES IN CANADA

Results Expected: INCREASED AWARENESS OF CANADA'S POTENTIAL AND ROLE AS IMPORTANT SUPPLIER IN THIS SECTOR.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 425 HAMBURG

Market: 128 GERMANY WEST

Sector: 005 COMM. & INFORM. EGP. & SERV

Subsector: 055 BROADCASTING (INC CATV)

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	80.00M	\$ 70.00M	\$ 60.00M	\$ 45.00M
Canadian Exports \$	4.00M	\$ 3.00M	\$ 2.00M	\$ 1.00M
Canadian Share of Import Market	5.00%	4.00%	3.00%	2.00%

Major Competing Countries

Market Share

i) 265 JAPAN	20 %
ii) 577 UNITED STATES OF AMERICA	15 %
iii) 112 FRANCE	10 %

Cumulative 3 year export potential for CDN products
in this Sector/Subsector: 15-30 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) TV BROADCASTING EQUIPMET	\$ 50.00 M
ii) FILMS AND PROGRAMS	\$ 20.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low
- approval of technical standards can present problems in the case of some imported products

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- non-tariff protectionist measures which are difficult to overcome
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

Export and Investment Promotion Planning System

MISSION: 425 HAMBURG

COUNTRY: 128 GERMANY WEST

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- No factors reported by mission

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: MONITORING OF PAY-TV PROJECT IN LOWER SAXONY.

Results Expected: INTRODUCE 3 CDN FIRMS TO PROJECT MANAGEMENT.

Activity: FOLLOW UP TO INTERMEDIA ON SALES AND COPRODUCTION OF FILMS AND TV PROGRAMS.

Results Expected: REPORT ON OPPORTUNITIES FOR DISTRIBUTION IN CANADA.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: MAINTAINING CONTACT WITH FRG BROADCASTING/VIDEOTEXT INDUSTRY IN ORDER TO BE PREPARED TO EXPLOIT OPPORTUNITIES SHOULD EXPANSION TAKE PLACE.

Results Expected: INTRODUCE 6 CDN FIRMS TO POTENTIAL GERMAN PARTNERS.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 425 HAMBURG

Market: 128 GERMANY WEST

Sector: 009 FOREST PRODUCTS, EQUIP, SERVICES

Subsector: 092 WOOD AND WOOD PRODUCTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1100.00M	\$ 1062.00M	\$ 1273.00M	\$ 1286.00M
Canadian Exports \$	63.00M	\$ 55.00M	\$ 72.00M	\$ 76.00M
Canadian Share of Import Market	6.00%	5.00%	6.00%	6.00%

Major Competing Countries

Market Share

i) 507 SWEDEN	026 %
ii) 504 FINLAND	019 %
iii) 553 UNION OF SOVIET SOC REP	010 %
iv) 026 AUSTRIA	008 %
v) 088 CZECHOSLOVAKIA	004 %
vi) 237 ITALY	004 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) SOFTWOOD PLYWOOD	\$ 20.00 M
ii) HEMLOCK LUMBER	\$ 18.00 M
iii) CEDAR LUMBER	\$ 9.00 M
iv) SPRUCE PINE FIR LUMBER SPF	\$ 5.00 M
v) SHINGLES, SHAKES	\$ 2.00 M

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

i) Project Name: PLYWOOD FOR 15-20 NEW TIMBER FRAME BUILDERS

Approximate Value: \$ 5 M
Financing Source: 028 TO/DETER
For further info. please contact:
W. M. SCHEFCZYK TLX:2-15 555

Export and Investment Promotion Planning System

MISSION: 425 HAMBURG,

COUNTRY: 128 GERMANY WEST

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low
- approval of technical standards can present problems in the case of some imported products

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- non-tariff protectionist measures which are difficult to overcome

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: COMPLETE LAST STAGE OF FOLLOW-UP ON ROUGHLY 100 LEADS RECEIVED AT WOODBUILDING SHOW IN MUNICH IN JUNE 86.

Results Expected: ADDITIONAL SALES OF APPROVED METRIC PLYWOOD
\$ 2 M BY END OF 1986.

Activity: PROVIDE NEW TIMBER FRAME BUILDERS NOW USING PLYWOOD WITH TECHNICAL DETAILS ON CLS LUMBER (WORK STARTED FY 86/87).

Results Expected: TRIAL ORDERS.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: WRITE ARTICLE FOR LEADING BUILDING JOURNAL ON ADVANTAGES OF CDN. PLYWOOD AND SOFTWOOD IN CONSTRUCTION.

Results Expected: INCREASED SALES OF PLYWOOD \$ 5 M BY END OF 1987.

Export and Investment Promotion Planning System

MISSION: 425 HAMBURG

COUNTRY: 128 GERMANY WEST

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: APPROACH GERMAN ROOF TRUSS MANUFACTURERS RE MACHINE STRESS RATED LUMBER BY MAILOUT.

Results Expected: TRIAL ORDERS.

Activity: NOTE: AS MARKET FOR PLYWOOD FOR CONCRETE CASING WILL CONTINUE TO DIMINISH, ADDITIONAL EFFORTS IN OTHER SECTORS ARE NECESSARY.

Results Expected:

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 425 HAMBURG

Market: 128 GERMANY WEST

Sector: 012 PETROCHEM & CHEM PROD, EQP, SERV

Subsector: 121 CHEM & PETROCHEM PRODUCTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import)	\$ 24000.00M	\$22000.00M	\$20000.00M	\$18000.00M
Canadian Exports	\$ 100.00M	\$ 100.00M	\$ 90.00M	\$ 95.00M
Canadian Share of Import Market	0.40%	0.50%	0.50%	0.60%

Major Competing Countries

Market Share

i) 112 FRANCE	10 %
ii) 577 UNITED STATES OF AMERICA	6 %
iii) 051 UNITED KINGDOM	3 %
iv) 237 ITALY	3 %

Cumulative 3 year export potential for CDN products
in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Mature with little growth

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) TOXIC PRODUCTS STORAGE	\$ 0.00 M
ii) TRANSIT TRADE THROUGH TRADING HOUSES	\$ 0.00 M

Projects or portion of projects which are still in the planning
stage and for which Canadian companies might have reasonable prospects.

- i) Project Name: TOXIC PRODUCTS LONG TERM STORAGE
Approximate Value: \$ 20 M
Financing Source: 013 NFR
For further info. please contact:
M. TETU, TLX 2-15 555

Export and Investment Promotion Planning System

MISSION: 425 HAMBURG

COUNTRY: 128 GERMANY WEST

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be moderate

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- other factor(s) described by the Trade Office as follows:
MATURE MARKET WITH LIMITED ROOM FOR EXPANSION.

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- Canada's position as one of the few major sources of international supply

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: DETERMINE STATUS OF OUTGOING INJECTION MOULDING AND RE-INFORCED PLASTICS MISSION.

Results Expected: EXPOSURE OF CANADIAN FIRMS TO EUROPEAN MARKET

Activity: CONTINUE IDENTIFYING AND QUALIFYING GERMAN TRADING HOUSES FOR OPPORTUNITIES BOTH IN THE FRG MARKET AND IN THE THIRD-WORLD MARKET.

Results Expected: LISTING OF QUALIFIED IMPORTERS/EXPORTERS.

Activity: CONTINUE IDENTIFYING CANADIAN SUPPLIERS OF SPECIALTY CHEMICALS AND RAW MATERIALS ABLE TO COMPETE WITH EUROPEAN SUPPLIERS ON WORLD-WIDE BASIS.

Results Expected: ADDITIONAL VISITS OF CANADIAN EXPORTERS TO FRG.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: COMPLETE GERMAN TRADING HOUSE SURVEY.

Results Expected: DIRECTORY OF QUALIFIED CONTACTS.

Export and Investment Promotion Planning System

MISSION: 425 HAMBURG

COUNTRY: 128 GERMANY WEST

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: DISTRIBUTE DIRECTORY TO CANADIAN INDUSTRY IN ORDER TO ENCOURAGE ADDITIONAL VISITS TO FRG.

Results Expected: INCREASE AWARENESS OF CDN INDUSTRY OF HAMBURG AS CHEMICAL/PHARMACEUTICAL RAW MATERIALS TRADING CENTRE.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 425 HAMBURG

Market: 128 GERMANY WEST

Sector: 015 CONSTRUCTION INDUSTRY

Subsector: 151 BUILDING PRODUCTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	110.00M	\$ 120.00M	\$ 140.00M	\$ 150.00M
Canadian Exports \$	4.00M	\$ 3.00M	\$ 3.00M	\$ 3.50M
Canadian Share of Import Market	3.00%	3.00%	2.00%	2.00%

Major Competing Countries

Market Share

i) 612 SCANDINAVIA	60 %
ii) 607 COMECON	30 %

Cumulative 3 year export potential for CDN products
in this Sector/Subsector: 5-15 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are
good market prospects

Current Total Imports

i) CEDAR SPECIALTIES	In Canadian \$
ii) LOG HOME PACKAGES	\$ 2.00 M
iii) BITUMEN PRODUCTS	\$ 1.00 M
	\$ 0.50 M

The Trade Office reports that the following factors influence Canadian
export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be moderate
- approval of technical standards can present problems in the case of some imported products

In the Trade Office's opinion, Canadian export performance in this sector
(sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- non-tariff protectionist measures which are difficult to overcome
- other factor(s) described by the Trade Office as follows:

QUALITY PROBLEMS. INCONSISTENCY OF SUPPLIES.

Export and Investment Promotion Planning System

MISSION: 425 HAMBURG

COUNTRY: 128 GERMANY WEST

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: IDENTIFY IMPORTER/DISTRIBUTOR WHO COULD HANDLE COMPLETE CDN PROGRAM FOR BUILDING PURPOSES INCLUDING NONWOODEN PRODUCTS.

Results Expected: INCREASE BY 0.5 - 1.5 \$M 1987.

Activity: PREPARE INFO SHEET FEATURING ALL BUILDING PRODUCTS INCLUDING TIMBER FRAME SYSTEM WHICH CAN BE SUPPLIED FROM CANADA.

Results Expected: INCREASE AWARENESS ON FINISHED AND SEMI-FINISHED BUILDING PRODUCTS FROM CANADA.

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional Projects approved and planned for the coming fiscal year.		
Mission: 425 HAMBURG		
Sector: 001 AGRI & FOOD PRODUCTS & SERVICE		
010 FAIRS ISM (INTERNATIONAL SWEETS AND BISCUITS)	COLOGNE	0188
Sector: 002 FISHERIES, SEA PRODUCTS & SERV.		
024 MISSION INCOMING FISH BUYING MISSION	HAMBURG	0388
Sector: 005 COMM. & INFORM. EGP. & SERV		
010 FAIRS CEBIT/COMPUTERS	HANNOVER	0388
CEBIT/TELECOM	HANNOVER	0388
Sector: 009 FOREST PRODUCTS, EQUIP, SERVICES		
010 FAIRS INTERZUM	COLOGNE	0587
BAU	MUNICH	0188
Sector: 010 MINE, METAL, MINERAL PROD & SRV		
024 MISSION INCOMING WOOD PRODUCTS BUYERS MISSION FROM HAMBURG, WEST GE		0000
Sector: 013 CONSUMER PRODUCTS		
010 FAIRS LIGNA - HANNOVER, WEST GERMANY	HANNOVER	0587
020 MISSION OUTGOING FILM COPRODUCTION MISSION TO HAMBURG, WEST GERMANY	HAMBURG	0000
Sector: 999 MULTIPLE SECTORS		
010 FAIRS ANUGA FOOD FAIR (INCL. FISH)	COLOGNE	1087
HANNOVER FAIR/TRADE CENTER	HANNOVER	0487
Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 425 HAMBURG		
Sector: 001 AGRI & FOOD PRODUCTS & SERVICE		
010 FAIRS ISM (INTERNATIONAL SWEETS & BISCUITS)	COLOGNE	0289

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 425 HAMBURG		
Sector: 005 COMM. & INFORM. EGP. & SERV		
010 FAIRS		
HANNOVER FAIR/MICROELECTRONICS	HANNOVER	0488
CEBIT/COMPUTERS	HANNOVER	0389
CEBIT/TELECOM	HANNOVER	0389
INTL SHIP/MARINE	HAMBURG	0988
Sector: 008 TRANSPORT SYS, EQUIP, COMP, SERV.		
010 FAIRS		
ILA INTL. AEROSPACE	HANNOVER	0588
INTERNATIONAL TRANSPORT	HAMBURG	0688
Sector: 009 FOREST PRODUCTS, EQUIP, SERVICES		
010 FAIRS		
HOLZBAU UND AUSBAU (WOOD HOUSE BLDG SHOW)	FRIEDRICHSHAVEN	0588
Sector: 015 CONSTRUCTION INDUSTRY		
010 FAIRS		
DEUBAU BUILDING	ESSEN	0189
DEUBAU/BUILDING	ESSEN	0189
Sector: 999 MULTIPLE SECTORS		
010 FAIRS		
ANUGA FOOD FAIR (INCL. FISH)	COLOGNE	1089
HANNOVER FAIR/TRADE CENTER	HANNOVER	0489
HANNOVER FAIR/TRADE CENTER	HANNOVER	0488

Export and Investment Promotion Planning System

87/88 Trade and Economic Overview

Mission: 427 MUNICH

Country: 128 GERMANY WEST

WEST GERMAN ECONOMIC GROWTH IN 1987, ESTIMATED AT 3%, WILL BE AMONG THE BEST OF ALL OECD ECONOMIES. STIMULUS FOR GROWTH HAS SHIFTED FROM EXPORTS TO DOMESTIC DEMAND. THE INCREASE IN VALUE OF DEUTSCH MARK IS THE MAIN REASON. WITH GERMAN DOMESTIC DEMAND INCREASING AT ANNUAL RATE OF 5%, INCREASED IMPORT DEMAND IS BEING GENERATED. WEST GERMAN IMPORTS HAVE BEEN INCREASING IN REAL TERMS AT A RATE OF 4.5% AND ARE FORECAST TO GROW AT A 5.5% RATE IN 1987. THE GERMAN PROPENSITY TO IMPORT AND THE SHARP DEPRECIATION OF THE CDN DOLLAR IN RELATION TO THE DM SUGGESTS CANADIAN EXPORTS TO WEST GERMANY WILL GROW IN 1987. THE FRG IMPORT MARKET SHOULD AMOUNT TO SOME 350 BILLION CDN \$ IN 1987. CANADA'S PRESENT SHARE OF THIS MARKET IS LESS THAN 1%. WE SHALL BE LOOKING FOR OPPORTUNITIES TO INCREASE OUR MARKET SHARE PARTICULARLY IN THE COMMUNICATIONS AND INFORMATICS, TRANSPORTATION SYSTEMS AND CONSUMER PRODUCTS SECTORS. GERMAN TOURISM TO CANADA, ALSO INFLUENCED BY THE DM/DOLLAR RELATIONSHIP, IS ALREADY SHOWING STRONG SIGNS OF PICKING UP. THIS SHOULD CONTINUE THROUGH 1987. HIGH PROFIT LEVELS OF GERMAN COMPANIES IN RECENT YEARS HAVE LED TO A STRONG DOMESTIC INVESTMENT TENDENCY. FOREIGN INVESTMENT IS A MAJOR AIM OF MANY GERMAN FIRMS WHICH, BECAUSE OF THEIR RECENT GOOD BALANCE SHEET PERFORMANCE, WILL BE IN A STRONGER POSITION TO PURSUE THEIR FOREIGN INVESTMENT INTERESTS. FOR CANADA THIS IMPLIES CONTINUING GOOD POTENTIAL, ALTHOUGH THE U. S. A. IS A VERY STRONG COMPETITOR FOR GERMAN INVESTMENT IN NORTH AMERICA. NEW F. R. G. INVESTMENT ABROAD IN 1986 WILL HAVE AMOUNTED TO SOME 7.6 BILLION CANADIAN \$. OVER THE COURSE OF THE YEAR, WE WILL SUPPORT BONN'S INVESTMENT PROMOTION PLANS BUT WILL PUT PARTICULAR EMPHASIS ON THE ELECTRONICS, MACHINERY AND CONSUMER PRODUCTS SECTORS.

Export and Investment Promotion Planning System

REPT: SYN-GEO 87/88 A. Post export program priorities

Region: WESTERN EUROPE

Mission: 427 MUNICH

Market: 128 GERMANY WEST

The Mission selected the following sectors as priority areas for export promotion activities for the coming fiscal year:

1. 005 COMM. & INFORM. EQP. & SERV

REASONS: MARKET IN POST TERRITORY IS GROWING AT ABOUT 15%/YEAR.

2. 008 TRANSPORT SYS, EQUIP, COMP, SERV.

REASONS: LOCAL AUTO INDUSTRY IS VERY LARGE. BMW-CANADA MOU SHOULD PROVIDE SOME LEVERAGE TO BUILD EXISTING EXPORTS.

3. 006 ELECTRONICS EQUIP. & SERV

REASONS: SIZE OF LOCAL MARKET AND RECENT SUCCESSES SUGGEST INCREASED EFFORT IN THIS SECTOR COULD BE PROFITABLE.

4. 013 CONSUMER PRODUCTS

REASONS: STRONG FRG ECONOMY, DM, GERMAN LOVE OF OUTDOORS GIVE POST TERRITORY CONSIDERABLE POTENTIAL AS MARKET FOR QUALITY LEISURE PRODUCTS.

The most important current Canadian export sectors to this market are (based on actual export sales):

1. 005 COMM. & INFORM. EQP. & SERV

2. 008 TRANSPORT SYS, EQUIP, COMP, SERV.

3. 006 ELECTRONICS EQUIP. & SERV

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 427 MUNICH

Market: 128 GERMANY WEST

Sector: 005 COMM. & INFORM. EQP. & SERV

Subsector: 053 TELECOMMUNICATIONS (INC SPACE)

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	2200.00M	\$ 2000.00M	\$ 1800.00M	\$ 1600.00M
Canadian Exports \$	38.00M	\$ 35.00M	\$ 32.60M	\$ 46.00M
Canadian Share of Import Market	1.80%	1.75%	1.80%	2.80%

Major Competing Countries

Market Share

i) 265 JAPAN	025 %
ii) 577 UNITED STATES OF AMERICA	019 %
iii) 112 FRANCE	012 %
iv) 354 NETHERLANDS	007 %
v) 051 UNITED KINGDOM	006 %
vi) 237 ITALY	005 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 60-100 \$M

Current status of Canadian exports:

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) DATA TELECOMMUNICATIONS	\$ 0.00 M
ii) DIGITAL SWITCHES & ALL KINDS OF ISDN EQUIP.	\$ 0.00 M
iii) FIBRE OPTICAL EQUIPMENT	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low
- approval of technical standards can present problems in the case of some imported products

Export and Investment Promotion Planning System

MISSION: 427 MUNICH

COUNTRY: 128 GERMANY WEST

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- non-tariff protectionist measures which are difficult to overcome

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

- the adequacy of exporter information in Canadian Directories
- sourcing assistance from Canadian federal/provincial governments departments

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: INTENSIFY CORPORATE LIAISON ACTIVITY TO TAKE ADVANTAGE OF EMERGING INTEREST IN TELECOMMUNICATIONS SECTOR.

Results Expected: IDENTIFICATION OF OPPORTUNITIES FOR CANADIAN SUPPLIERS INCLUDING POSSIBILITIES OF JOINT VENTURES

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 427 MUNICH

Market: 128 GERMANY WEST

Sector: 005 COMM. & INFORM. EQP. & SERV

Subsector: 054 COMPUTERS, SOFTWARE & SYSTEMS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import)	\$ 18500.00M	\$16200.00M	\$14000.00M	\$11300.00M
Canadian Exports	\$ 30.00M	\$ 25.00M	\$ 33.00M	\$ 35.80M
Canadian Share of Import Market	0.20%	0.15%	0.20%	0.20%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	029 %
ii) 051 UNITED KINGDOM	014 %
iii) 265 JAPAN	012 %
iv) 112 FRANCE	010 %
v) 237 ITALY	008 %
vi) 354 NETHERLANDS	005 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 60-100 \$M

Current status of Canadian exports: Market share declining

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) DATA COMMUNICATION	\$ 0.00 M
ii) SOFTWARE	\$ 0.00 M
iii) OFFICE AUTOMATION	\$ 0.00 M
iv) LOCAL AREA NETWORKS	\$ 0.00 M
v) CAD/CAM	\$ 0.00 M
vi) EDP FOR AUTOMATIZATION, TEST & MEASURE	\$ 0.00 M
vii) SPECIAL PERIPHERAL EQUIP.,	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low
- approval of technical standards can present problems in the case of some imported products

Export and Investment Promotion Planning System

MISSION: 427 MUNICH

COUNTRY: 128 GERMANY WEST

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- the apparent limited sectoral capability in Canada compared to other competing export countries
- high tariffs
- non-tariff protectionist measures which are difficult to overcome
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

- sourcing assistance from Canadian federal/provincial governments departments

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: WILL CANVASS MAJOR CORPORATIONS IN TERRITORY TO DETERMINE THEIR FUTURE REQUIREMENTS FOR DATA COMMUNICATIONS EQUIPMENT/SERVICES LOCAL AREA NETWORKS, APPLICATION SOFTWARE AND MODULAR OFFICE EQUIPMENT.

Results Expected: UNCOVER EMERGING OPPORTUNITIES BY TAKING ADVANTAGE OF OUR CLOSE LINKS WITH USA AND DOMINANT SALES OF AMERICAN FIRMS IN INFORMATICS IN FRG MARKET. N

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 427 MUNICH

Market: 128 GERMANY WEST

Sector: 005 COMM. & INFORM. EQP. & SERV

Subsector: 055 BROADCASTING (INC CATV)

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	240.00M	\$ 200.00M	\$ 170.00M	\$ 135.00M
Canadian Exports \$	0.00M NA	\$ 0.00M NA	\$ 0.00M NA	\$ 0.00M NA
Canadian Share of Import Market	0.00% NA	0.00% NA	0.00% NA	0.00% NA

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	020 %
ii) 265 JAPAN	015 %
iii) 112 FRANCE	012 %
iv) 051 UNITED KINGDOM	010 %
v) 354 NETHERLANDS	008 %
vi) 237 ITALY	007 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 5-15 \$M

Current status of Canadian exports: No Export results to date

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) DESCRAMBLERS FOR PAY TV	\$ 0.00 M
ii) STUDIO EQUIPMENT	\$ 0.00 M
iii) SATELLITE RECEIVERS AND ANTENNAS	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low
- approval of technical standards can present problems in the case of some imported products

Export and Investment Promotion Planning System

MISSION: 427 MUNICH

COUNTRY: 128 GERMANY WEST

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- non-tariff protectionist measures which are difficult to overcome
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- No factors reported by mission

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: CONTINUE CORPORATE LIAISON ACTIVITIES TO KEEP ABREAST OF EMERGING OPPORTUNITIES IN CATV SECTOR PARTICULARLY NOW THAT PRIVATISATION OF BROADCASTING IS INCREASING .

Results Expected: EARLY INVOLVMENT OF CATV SUPPLIERS IN PROCUREMENT PROGRAMS OF BAVARIAN TV ORGANIZATIONS.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 427 MUNICH

Market: 128 GERMANY WEST

Sector: 006 ELECTRONICS EQUIP. & SERV

Subsector: 061 PRODUCTS & COMPONENTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	9600.00M	\$ 8900.00M	\$ 8300.00M	\$ 7600.00M
Canadian Exports \$	21.50M	\$ 18.20M	\$ 14.80M	\$ 8.90M
Canadian Share of Import Market	0.20%	0.20%	0.18%	0.10%

Major Competing Countries

Market Share

i) 265 JAPAN	016 %
ii) 112 FRANCE	008 %
iii) 051 UNITED KINGDOM	007 %
iv) 237 ITALY	006 %
v) 434 TAIWAN	003 %
vi) 354 NETHERLANDS	003 %

Cumulative 3 year export potential for CDN products
in this Sector/Subsector: 30-60 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are
good market prospects

Current Total Imports

	In Canadian \$
i) ASSEMBLIES OF COMPONENTS	\$ 0.00 M
ii) SPECIAL INTEGRATION CIRCUITS	\$ 0.00 M
iii) OPTO ELECTRONIC PARTS	\$ 0.00 M
iv) POWER SUPPLIES	\$ 0.00 M
v) CONNECTORS	\$ 0.00 M
vi) KEYS	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian
export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

Export and Investment Promotion Planning System

MISSION: 427 MUNICH

COUNTRY: 128 GERMANY WEST

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: INTENSIFY CORPORATE LIAISON PROGRAM WITH KEY COMPANIES IN THIS SECTOR.

Results Expected: IMPROVED KNOWLEDGE OF POTENTIAL BUSINESS PARTNERS FOR CDN COMPANIES IN THIS SECTOR AND BETTER TARGETTING OF MARKETING EFFORTS BY MISSION.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: UNDERTAKE MARKET STUDY FOR ELECTRONIC COMPONENTS .

Results Expected: IMPROVED KNOWLEDGE OF PRECISE AREAS OF SPECIALTY . FACILITATE IDENTIFICATION OF PARTNERS FOR JOINT VENTURES, LICENSING AND TECHNOLOGY TRANSFER.

Activity: INITIATE SYTEMATIC APPROACH TO LARGE FRG FIRMS TO SEARCH FOR WEAK LINKS IN THEIR COMPONENTS SUPPLIERS NETWORK FOCUSING FIRST ON ITEMS ALREADY BEING EXPORTED TO FRG THEN MOVING TO OPPORTUNITIES FOR NEW PRODUCTS.

Results Expected: UNCOVER OPPORTUNITIES FOR EXPANSION OF PRESENT EXPORTS (DOUBLED IN LAST 2 YRS) AND IDENTIFY TARGETS FOR INTRODUCTION OF NEW PRODUCTS.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 427 MUNICH

Market: 128 GERMANY WEST

Sector: 008 TRANSPORT SYS. EQUIP. COMP. SERV.

Subsector: 081 AUTOMOTIVE

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	4620.00M	\$ 4200.00M	\$ 3780.00M	\$ 3290.00M
Canadian Exports \$	0.00M	\$ 120.64M	\$ 120.00M	\$ 40.62M
Canadian Share of Import Market	0.00%	0.30%	0.30%	0.14%

Major Competing Countries	Market Share
i) 112 FRANCE	026 %
ii) 237 ITALY	013 %
iii) 051 UNITED KINGDOM	012 %
iv) 606 BENELUX COUNTRIES	008 %
v) 026 AUSTRIA	007 %
vi) 577 UNITED STATES OF AMERICA	005 %

Cumulative 3 year export potential for CDN products
in this Sector/Subsector: 30-60 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) BRAKE PADS	\$ 0.00 M
ii) WINDOW LIFTERS	\$ 0.00 M
iii) SEAT BELTS	\$ 0.00 M
iv) INSTRUMENT CLUSTERS	\$ 0.00 M
v) V-BELTS	\$ 0.00 M
vi) CLUTCHES	\$ 0.00 M
vii) ALUMINUM PARTS	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- there are import restrictions which can present significant problems
- the degree of import duty protection of local industry tends to be high
- approval of technical standards can present problems in the case of some imported products

Export and Investment Promotion Planning System

MISSION: 427 MUNICH

COUNTRY: 128 GERMANY WEST

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- the unsuitability of Canadian products for this market
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- high tariffs
- non-tariff protectionist measures which are difficult to overcome
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters
- other factor(s) described by the Trade Office as follows:

NON-TARIFF BARRIERS I. E. -STANDARDS FEDERAL TECHNICAL CONTROLS (TUV)

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- strong sectoral capability in Canada
- the existence of a bilateral economic/trade arrangement between Canada and this country

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: BMW-CANADA MOU CURRENTLY IN PLACE.

Results Expected: PROVIDES FRAMEWORK FOR EXPANSION AND DIVERSIFICATION OF OEM SUPPLY CONTRACTS PARTICULARLY AS BMW INTRODUCES NEW MODELS TO NORTH AMERICA MARKET.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: UNDERTAKE MARKET STUDY TO IDENTIFY AUTOMOTIVE COMPONENTS CURRENTLY IMPORTED AND FUTURE NEEDS OF INDUSTRY.

Results Expected: INVENTORY OF PRODUCTS (OEM&AFTER MARKET) IN WHICH CDN SUPPLIERS ARE COMPETITIVE AND CLD DISPLACE OTHER EXPORTERS . IDENTIFICATION OF FUTURE REQUIREMENTS OF FRG AUTO MANUFACTURERS

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 427 MUNICH

Market: 128 GERMANY WEST

Sector: 013 CONSUMER PRODUCTS

Subsector: 134 LEISURE PROD. TOOLS HARDWARE

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	2005.00M	\$ 1981.00M	\$ 1890.00M	\$ 1792.00M
Canadian Exports \$	3.50M	\$ 3.20M	\$ 2.94M	\$ 1.75M
Canadian Share of Import Market	0.01%	0.01%	0.01%	0.09%

Major Competing Countries

Market Share

i) 237 ITALY	022 %
ii) 434 TAIWAN	009 %
iii) 026 AUSTRIA	006 %
iv) 112 FRANCE	005 %
v) 189 HONG KONG	004 %
vi) 268 KOREA	004 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 15-30 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

In Canadian \$

i) WINTER SPORT EQUIPMENT	\$ 0.00 M
ii) BODY BUILDING	\$ 0.00 M
iii) OUTDOOR CAMPING EQUIPMENT	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be high
- approval of technical standards can present problems in the case of some imported products

Export and Investment Promotion Planning System

MISSION: 427 MUNICH

COUNTRY: 128 GERMANY WEST

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- the apparent limited sectoral capability in Canada compared to other competing export countries
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- high tariffs
- non-tariff protectionist measures which are difficult to overcome
- other factor(s) described by the Trade Office as follows:
 - UNRELIABILITY OF CANADIAN SUPPLIERS TO DELIVER ON-TIME
 - POOR MAINTENANCE OF BUSINESS CONTACTS.

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- support provided by the PEMD program
- participation in trade fairs
- use of Canadian Government export promotion activities
- strong sectoral capability in Canada

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

- the adequacy of exporter information in Canadian Directories
- product/service information from Canadian companies

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: UNDERTAKE MARKET STUDY OF SPORTING GOODS MARKET.

Results Expected: BUILDING ON CURRENT KNOWLEDGE OF MKT (TOP END NOW DOMINATED BY EUROPEANS & LOW END BY S.E. ASIA). IDENTIFY NICHEs TO BE EXPLOITED BY CDA. ALSO IDENTIFY KEY BUYERS FOR ISPO FAIR.

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional Projects approved and planned for the coming fiscal year.		
Mission: 427 MUNICH		
Sector: 005 COMM. & INFORM. EQP. & SERV		
010 FAIRS		
SYSTEMS 87	MUNICH	1087
CEBIT 88	HANNOVER	0388
024 MISSION INCOMING		
DATA TRANSMISSION		0987
CABLE TV 87		0587
Sector: 006 ELECTRONICS EQUIP. & SERV		
010 FAIRS		
LASER 87 OPTO ELECTRONICS	MUNICH	0687
SYSTEMS 87	MUNICH	1087
CEBIT '88	HANNOVER	0388
020 MISSION OUTGOING		
AVIONICS & AEROSPACE PARTS	SEVERAL	1187
Sector: 008 TRANSPORT SYS, EQUIP, COMP, SERV.		
020 MISSION OUTGOING		
AUTOMOTIVE PARTS MISSION	SEVERAL	0687
Sector: 013 CONSUMER PRODUCTS		
010 FAIRS		
ISPO SPRING 88	MUNICH	0288
ISPO SPRING 88	MUNICH	0288
ISPO FALL 87	MUNICH	0987
IFA '87 - BERLIN, WEST GERMANY	BERLIN	0987
ISPO FALL-MUNICH, WEST GERMANY	MUNICH	0987
ISPO SPRING '88 - MUNICH, WEST GERMANY	MUNICH	0288
Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 427 MUNICH		
Sector: 005 COMM. & INFORM. EQP. & SERV		
010 FAIRS		
CEBIT 90	HANNOVER	0390
SYSTEC (INFO BOOTH)	MUNICH	1088

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 427 MUNICH		
Sector: 005 COMM. & INFORM. EGP. & SERV		
010 FAIRS SYSTEMS 89	MUNICH	1089
020 MISSION OUTGOING VIDEOTEX SOFTWARE	SEVERAL	0588
Sector: 006 ELECTRONICS EQUIP. & SERV		
010 FAIRS ELECTRONICA 88	MUNICH	1188
LASER 89	MUNICH	0789
ANALYTICA	MUNICH	0688
IFA	WEST BERLIN	0989
Sector: 013 CONSUMER PRODUCTS		
010 FAIRS ISPO FALL 88	MUNICH	0988
ISPO FALL 89	MUNICH	0989
ISPO SPRING 90	MUNICH	0290

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Export and Investment Promotion Planning System

87/88 Trade and Economic Overview

Mission: 431 HELSINKI

Country: 504 FINLAND

AFTER FIVE YEARS OF SUPERIOR ECONOMIC GROWTH THAT, WITH GDP INCREASING BY ABOUT 3% ANNUALLY, SIGNICANTLY OUTPERFORMED THE OECD AVERAGE, FINLAND HAS COME INTO TOUGHER TIMES. THE COMPETITIVENESS OF ITS INDUSTRY IS DETERIORATING DUE TO PREVIOUSLY HIGH LEVELS OF INFLATION & CONTINUING INCREASES IN LABOUR COSTS. ANOTHER PROBLEM IS THE COUNTRY'S TRADE WITH THE SOVIET UNION, WHICH ACCOUNTS FOR ONE FIFTH OF ITS TOTAL TRADE AND IS GOVERNED BY A BILATERAL AGREEMENT CALLING FOR BALANCED TRADE OVER A 5 YEAR PERIOD. THIS TRADE HAS TO A LARGE MEASURE BEEN RESPONSIBLE FOR THE REMARKABLE PROGRESS OF FINLAND'S INDUSTRY. AS MOST OF ITS IMPORTS FROM THE SOVIET UNION IS OIL, HIGH OIL PRICES HAVE MEANT INCREASED MANUFACTURED EXPORTS TO THE SOVIET UNION. THUS IN 1985 FINNISH SALES TO THAT COUNTRY GREW BY 15% WHILE THOSE TO THE WEST DECREASED. THE DRASTIC FALL IN OIL PRICES DURING 1986, HOWEVER, HAS RESULTED IN A \$1.4 BILLION FINNISH SURPLUS IN THE BILATERAL CLEARING ACCOUNT THAT MUST BE REDUCED BY LOWERING FINNISH EXPORTS TO THE SOVIET UNION-PROBABLY BY 5% THIS YEAR & BY AT LEAST 15% IN 1987. THIS WILL ESPECIALLY HURT FINNISH EXPORTERS OF CONSUMER PRODUCTS WHO HAVE COME TO RELY ON THE SOVIET MARKET DURING RECENT YEARS. WITH ITS OWN DECREASED OIL EXPORT EARNINGS, THE SOVIET UNION HAS BECOME MORE INSISTENT ON LOW PRICES THUS DECREASING THE PROFITABILITY OF THE LARGELY METAL & ENGINEERING EXPORTS THAT WILL CONTINUE TO BE MADE. ALTHOUGH TAKING ADVANTAGE OF THE EXPORT OPPORTUNITIES IN THE GROWING WESTERN ECONOMIES MAY INVOLVE A DEVALUATION OF THE FINNMARK, THE CRUCIAL FORESTRY PRODUCTS AND METAL ENGINEERING SECTORS ARE EXPECTED TO PERFORM REASONABLY WELL THIS YEAR. WITH BOTH INVESTMENT & CONSUMPTION EXPECTED TO GROW BY 3%, GROWTH IN GDP SHOULD STILL BE ABOUT 2.5% IN 1986 AND MAY RETURN TO 3% IN 1987. INFLATION, NOW AT 3.5%, SHOULD DECREASE TO 3% IN 1987. UNEMPLOYMENT, HOWEVER, WILL WORSEN, MOVING FROM 6.3% IN 1985 TO 6.9% IN 1986 & 7.1% IN 1987. FINLAND IS EXPERIENCING AN INDUSTRIAL RESTRUCTURING THAT WILL INVOLVE CONTINUING TAKEOVERS OF SMALLER MANUFACTURERS BY LARGER CONGLOMERATES & HIGH LEVELS OF INVESTMENTS ABROAD. THERE ARE CONCURRENTLY AN INCREASED EMPHASIS ON HIGH TECHNOLOGY APPLICATIONS & STEPPED UP EFFORTS IN RESEARCH AND DEVELOPMENT. WITH CANADA BEING A FAVOURED TARGET OF FINNISH INVESTORS (MOST OF THE TOP INDUSTRIAL 20 COMPANIES HAVE OPERATIONS IN CANADA) AND POSSESSING A STRONG HIGH TECHNOLOGY SECTOR, THE PROSPECTS FOR INCREASING ECONOMIC RELATIONS ARE EXCELLENT. THE POSSIBILITIES FOR CANADIAN EXPORTERS TO REALIZE SALES TO THE SOVIET UNION THROUGH FINLAND ARE INCREASINGLY APPARENT AND SHOULD RECEIVE CONSIDERABLE ATTENTION IN FUTURE.

27/02/87

DEPARTMENT OF EXTERNAL AFFAIRS

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Export and Investment Promotion Planning System

REPT: SYN-GEO 87/88 A. Post export program priorities

Region: WESTERN EUROPE

Mission: 431 HELSINKI

Market: 504 FINLAND

The Mission selected the following sectors as priority areas for export promotion activities for the coming fiscal year:

1. 005 COMM. & INFORM. EQP. & SERV

REASONS: THIS IS A STRONG SECTOR IN CDA & FINLAND IS RAPIDLY EXPANDING ITS INFORMATICS & COMMUNICATIONS CAPABILITIES.

2. 013 CONSUMER PRODUCTS

REASONS: THERE IS LARGE BUT STAGNANT FOR CANADIAN SPORTING (ESPECIALLY HOCKEY) EQUIPMENT. THE POST RECEIVES PLENTY OF ENQUIRIES ON OTHER CONSUMER PRODUCTS BUT OPPORTUNITIES ARE LIMITED.

3. 002 FISHERIES, SEA PRODUCTS & SERV.

REASONS: FINLAND IS THE LARGEST EUROPEAN IMPORTER OF CDN WHITEFISH, AND THERE IS A HIGH PER CAPITA CONSUMPTION OF OTHER FISH PRODUCTS WITH LIMITED LOCAL SUPPLY. WE SEE STRONG UPWARD TREND IN DEMAND FOR SPECIAL SEAFOOD.

4. 001 AGRI & FOOD PRODUCTS & SERVICE

REASONS: FINLAND SHOULD DECREASE ITS AGRICULTURAL SUBSIDIES & SEASONAL VARIATIONS LEAD TO INCREASED DEMAND FOR FOOD PRODUCTS SUCH AS BERRIES, HEALTH FOODS ETC.

The most important current Canadian export sectors to this market are (based on actual export sales):

1. 010 MINE, METAL, MINERAL PROD & SRV
2. 012 PETROCHEM & CHEM PROD, EQP, SERV
3. 006 ELECTRONICS EQUIP. & SERV
4. 001 AGRI & FOOD PRODUCTS & SERVICE
5. 002 FISHERIES, SEA PRODUCTS & SERV.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 431 HELSINKI

Market: 504 FINLAND

Sector: 001 AGRI & FOOD PRODUCTS & SERVICE

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1500.00M	\$ 1470.00M	\$ 1044.00M	\$ 1009.00M
Canadian Exports \$	6.00M	\$ 5.60M	\$ 7.50M	\$ 4.50M
Canadian Share of Import Market	0.40%	0.40%	0.70%	0.50%

Major Competing Countries

Market Share

i) 073 COLOMBIA	008 %
ii) 047 BRAZIL	008 %
iii) 507 SWEDEN	007 %
iv) 354 NETHERLANDS	005 %
v) 499 SPAIN	005 %
vi) 577 UNITED STATES OF AMERICA	004 %

Cumulative 3 year export potential for CDN products
in this Sector/Subsector: 15-30 \$M

Current status of Canadian exports: Mature with little growth

Products/services for which there are
good market prospects

Current Total Imports

	In Canadian \$
i) TOBACCO	\$ 68.00 M
ii) CATTLE AND FUR SKINS	\$ 38.00 M
iii) APPLES	\$ 42.00 M
iv) BERRIES	\$ 2.00 M
v) FLAX + MUSTARD SEED	\$ 0.60 M

The Trade Office reports that the following factors influence Canadian
export performance in this market for this sector (sub-sector).

- there are import restrictions which can present significant problems
- exports of certain products or services to this country are subject to Canadian export controls
- the degree of import duty protection of local industry tends to be low
- approval of technical standards can present problems in the case of some imported products

Export and Investment Promotion Planning System

MISSION: 431 HELSINKI

COUNTRY: 504 FINLAND

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- No factors reported by mission

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade fairs
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: IN STORE PROMOTION OF CONSUMER AND FOOD PRODUCTS IN FALL OF 1987.

Results Expected: A GREATER FINNISH AWARENESS OF CANADIAN FOOD PRODUCTS; SOME INCREASE IN SALES.

Activity: REPORT EXPECTED EASING OF FINNISH IMPORT RESTRICTIONS ON FOOD PRODUCTS TO THE DEPARTMENT AND SELECTED CANADIAN EXPORTERS.

Results Expected: SOME INCREASE IN EXPORT OPPORTUNITIES FOR CANADIAN SUPPLIERS.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 431 HELSINKI

Market: 504 FINLAND

Sector: 002 FISHERIES, SEA PRODUCTS & SERV.

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	77.00M	\$ 71.00M	\$ 65.00M	\$ 60.00M
Canadian Exports \$	3.80M	\$ 3.10M	\$ 2.60M	\$ 3.00M
Canadian Share of Import Market	5.00%	4.20%	4.00%	5.00%

Major Competing Countries

Market Share

i) 410 NORWAY	050 %
ii) 507 SWEDEN	017 %
iii) 520 THAILAND	007 %
iv) 405 ICELAND	004 %
v) 093 DENMARK	003 %
vi) 128 GERMANY WEST	002 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 5-15 \$M

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) FROZEN FISH	\$ 35.00 M
ii) LOBSTER	\$ 0.20 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- there are import restrictions which can present significant problems
- the degree of import duty protection of local industry tends to be moderate
- approval of technical standards can present problems in the case of some imported products

Export and Investment Promotion Planning System

MISSION: 431 HELSINKI

COUNTRY: 504 FINLAND

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- the unsuitability of Canadian products for this market
- non-tariff protectionist measures which are difficult to overcome

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade fairs
- use of Canadian Government export promotion activities
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: THE POST HAS FACILITATED DISCUSSIONS BETWEEN FANDO AND THE FINNISH CUSTOMS LABORATORY FOR THE EVENTUAL SIGNING OF A BILATERAL FOOD AND FISH INSPECTION AGREEMENT.

Results Expected: SIMPLIFICATION OF FINNISH INSPECTION PROCEDURES FOR CDN FISH EXPORTS; THESE PROCEDURES HAVE BEEN PROBLEMATIC IN THE PAST.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: DUE TO RAPIDLY INCREASING CONSUMPTION OF SPECIALITY SEAFOOD WE WILL PROVIDE RESTAURANT OPERATORS WITH CANADIAN SEAFOOD CATALOGUE AND OTHER PUBLICATIONS.

Results Expected: RESTAURANT OWNERS WILL REQUEST SPECIFIC CANADIAN SEAFOOD PRODUCTS FROM DISTRIBUTORS.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 431 HELSINKI

Market: 504 FINLAND

Sector: 005 COMM. & INFORM. EQP. & SERV

Subsector: 054 COMPUTERS, SOFTWARE & SYSTEMS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	720.00M	\$ 715.00M	\$ 604.00M	\$ 519.00M
Canadian Exports \$	5.70M	\$ 4.00M	\$ 4.30M	\$ 4.30M
Canadian Share of Import Market	0.80%	0.60%	0.70%	0.80%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	030 %
ii) 265 JAPAN	015 %
iii) 128 GERMANY WEST	012 %
iv) 051 UNITED KINGDOM	011 %
v) 507 SWEDEN	007 %
vi) 112 FRANCE	006 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 15-30 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) COMPUTER HARDWARE SYSTEMS	\$ 380.00 M
ii) COMPUTER PERIPHERALS AND SOFTWARE	\$ 151.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- exports of certain products or services to this country are subject to Canadian export controls
- the degree of import duty protection of local industry tends to be low

Export and Investment Promotion Planning System

MISSION: 431 HELSINKI

COUNTRY: 504 FINLAND

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

- the adequacy of exporter information in Canadian Directories

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: DATABASE COMPILED BY POST OF AGENTS, DISTRIBUTORS AND PURCHASERS OF INFORMATICS WILL BE UPDATED.

Results Expected: CONSIDERABLY IMPROVED ASSISTANCE TO CANADIAN EXPORTERS, INCREASE NUMBER OF AGENTS/DISTRIBUTORS REPRESENTING CANADIAN FIRMS.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: MASS MAILINGS OF DEPARTMENTAL PUBLICATIONS, GREATER PERSONAL CONTACT WITH FINNISH IMPORTERS.

Results Expected: INCREASED FINNISH AWARENESS OF CDN INFORMATIC CAPABILITIES, GREATER NUMBER OF AGENTS/DISTRIBUTORS FOR CDN FIRMS.

Export and Investment Promotion Planning System

MISSION: 431 HELSINKI

COUNTRY: 504 FINLAND

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: PREPARE REPORT IN FINNISH INFORMATICS MARKET AND FORWARD TO OTTAWA AND CANADIAN FIRMS.

Results Expected: BETTER KNOWLEDGE OF OPPORTUNITIES IN FINLAND.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 431 HELSINKI

Market: 504 FINLAND

Sector: 005 COMM. & INFORM. EQP. & SERV

Subsector: 055 BROADCASTING (INC CATV)

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	420.00M	\$ 285.00M	\$ 244.00M	\$ 174.00M
Canadian Exports \$	0.40M	\$ 0.29M	\$ 0.35M	\$ 0.00M
Canadian Share of Import Market	0.10%	0.10%	0.10%	0.00%

Major Competing Countries

Market Share

i) 507 SWEDEN	030 %
ii) 265 JAPAN	017 %
iii) 128 GERMANY WEST	014 %
iv) 051 UNITED KINGDOM	007 %
v) 577 UNITED STATES OF AMERICA	005 %
vi) 093 DENMARK	005 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 1-3 \$M

Current status of Canadian exports: Small but expanding.

Products/services for which there are good market prospects

Current Total Imports

- i) CATV EQUIPMENT
- ii) CATV SERVICES

In Canadian \$
\$ 5.00 M
\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- exports of certain products or services to this country are subject to Canadian export controls
- the degree of import duty protection of local industry tends to be low

Export and Investment Promotion Planning System

MISSION: 431 HELSINKI

COUNTRY: 504 FINLAND

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- No factors reported by mission

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- support provided by the PEMD program
- participation in trade missions
- use of Canadian Government export promotion activities
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: REPORT DEVELOPMENTS IN CATV AND TV BROADCASTING, WHICH ARE MOVING VERY QUICKLY IN FINLAND, TO DOC + CANADIAN FIRMS.

Results Expected: SIGNIFICANT PARTICIPATION BY CANADIAN COMPANIES IN CATV DEVELOPMENTS.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: PREPARE REPORT ON TELECOMMUNICATIONS AND CATV IN FINLAND, FORWARD TO DOC AND CANADIAN SUPPLIERS.

Results Expected: INCREASED CANADIAN SALES.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 431 HELSINKI

Market: 504 FINLAND

Sector: 013 CONSUMER PRODUCTS

Subsector: 134 LEISURE PROD. TOOLS HARDWARE

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	85.00M	\$ 85.00M	\$ 85.00M	\$ 81.00M
Canadian Exports \$	2.80M	\$ 2.50M	\$ 0.86M	\$ 1.11M
Canadian Share of Import Market	3.30%	3.00%	0.90%	1.40%

Major Competing Countries

Market Share

i) 128 GERMANY WEST	010 %
ii) 189 HONG KONG	010 %
iii) 507 SWEDEN	009 %
iv) 112 FRANCE	006 %
v) 237 ITALY	006 %
vi) 026 AUSTRIA	005 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 5-15 \$M

Current status of Canadian exports: Mature with little growth

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) HOCKEY SKATES + EQUIPT.	\$ 4.00 M
ii) FITNESS EQUIPMENT	\$ 5.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be moderate

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- No factors reported by mission

Export and Investment Promotion Planning System

MISSION: 431 HELSINKI

COUNTRY: 504 FINLAND

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade fairs
- use of Canadian Government export promotion activities
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: IN-STORE PROMOTION OF CANADIAN SPORTING GOODS.

Results Expected: SOME INCREASE IN SALES.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ANNUAL RECEPTION FOR MAJOR DISTRIBUTOR OF CANADIAN SKATES AND HOCKEY EQUIPMENT TO WHICH MOST IMPORTANT BUYERS AND SPORTS JOURNALISTS ARE INVITED.

Results Expected: REGAINING MARKET SHARE OF HOCKEY SKATES AND EQUIPMENT.

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional Projects approved and planned for the coming fiscal year.		
Mission: 431 HELSINKI		
Sector: 001 AGRI & FOOD PRODUCTS & SERVICE		
010 FAIRS IN-STORE CONSUMER & FOOD PRODUCTS PROMOTION	HELSINKI	0087
Sector: 002 FISHERIES, SEA PRODUCTS & SERV.		
020 MISSION OUTGOING SPECIALTY SEAFOODS MISSION/PROMOTION	HELSINKI	1087
Sector: 005 COMM. & INFORM. EGP. & SERV		
024 MISSION INCOMING INFORMATICS JOURNALIST VISIT TO CANADA		1087
Sector: 006 ELECTRONICS EQUIP. & SERV		
020 MISSION OUTGOING COMPUTER SOFTWARE MISSION TO FINLAND, SWEDEN, NORWA	HELSINKI	0288
ELECTRONICS COMPONENTS MISSION TO FINLAND	HELSINKI	0587
FOREIGN INVESTMENT MISSION TO FINLAND	HELSINKI	0687
FOREIGN INVESTMENT SEMINARS IN FINLAND		0288
Sector: 008 TRANSPORT SYS, EQUIP, COMP, SERV.		
020 MISSION OUTGOING SHIPBUILDING COMPONENTS MISS. TO FINLAND	HELSINKI	1087
OFFSHORE TECHNOLOGY MISSION	HELSINKI, RAUMA	0288
Sector: 013 CONSUMER PRODUCTS		
010 FAIRS INFO BOOTH AT TRAVEL '88,	HELSINKI, FINLAND	HELSINKI
IN-STORE CONSUMER AND FOOD	PRODUCTS SHOW, HELSINKI	HELSINKI
		0188
		0587
024 MISSION INCOMING FINNISH BUYERS TO CSGA SHOW	MONTREAL	0288
SPORTING GOODS BUYERS FM FINL. NORWAY, DENM., TO CSGA	MONTREAL	0288
Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 431 HELSINKI		
Sector: 005 COMM. & INFORM. EGP. & SERV		
010 FAIRS BUSINESS MACHINES & EQUIPMENT EXHIBITION	HELSINKI	0988

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 431 HELSINKI		
Sector: 006 ELECTRONICS EQUIP. & SERV		
010 FAIRS ELTEK/ELKOM EXHIBITION	HELSINKI	0389

Export and Investment Promotion Planning System

87/88 Trade and Economic Overview

Mission: 432 STOCKHOLM

Country: 507 SWEDEN

THE SWEDISH ECON. ENJOYS THE PROSPECT OF ANOTHER RECORD YEAR IN 1986-87. THE CONTINUED GROWTH PROSPECTS ARE BASED ON THE FALL IN THE OIL PRICE, COUPLED WITH THE DROP IN VALUE OF THE US DOLLAR. SWEDISH FIRMS HAD RECORD PROFITS IN '85, WHICH BEGAN WITH THE DEVALUATION OF THE KRONOR IN '81 & '82. BY LATE '85, THE COMPETITIVE ADVANTAGE OF THE DEVALUATIONS HAD BEEN EXHAUSTED BY THE CONTINUED RISE IN DOMESTIC PRODUCTION COSTS, PARTICULARLY AS UNIONS DEMANDED THEIR SHARE OF THE CORPORATE PROFITS ARISING FM LARGE EXPORT SALES INCREASES. AS A RESULT, PREDICTIONS OF ZERO GROWTH IN SWEDISH IND. FOR '86 EMERGED AS PROD'N COSTS THREATENED TO OVERTAKE SALES GROWTH. HOWEVER, THESE PREDICTIONS WERE BASED ON STEADY ENERGY PRICES IN AN IND'L NATION WITH NEGLIGIBLE FOSSIL FUEL RESOURCES, & ON STEADY FOREIGN DEBT SRVC COSTS FOR DEBTS INCURRED SINCE THE OIL PRICE INCREASES IN THE MID-'70'S. THE FALL IN THE INT'L OIL PRICE HAS SERVED TO OFFSET THE INCREASES IN PERSONNEL COSTS FOR SWEDISH IND., THERBY MAINTAINING THE PROFITABILITY OF EXPORT SALES. THE FALL IN THE VALUE OF THE US DOLLAR HAS SIGNIFICANTLY REDUCED DEBT SERVICE COSTS FOR SWEDEN TO THE POINT WHERE SWEDEN WILL REDUCE ITS FOREIGN DEBT FOR THE 1ST TIME IN A DECADE. WITH YEAR TO YEAR GROWTH OF 3% IN THE GDP FOR 1ST HALF OF '86, A PREDICTION OF ANNUAL REAL GNP GROWTH OF 2.5% FOR '86 APPEARS REALISTIC, AS DOES A PREDICTION OF 1.5 TO 2% FOR '87. THE POTENTIAL FOR INCREASED ECON. COOP'N BETWEEN CDA & SWEDEN IS LIMITED ONLY BY THE INTEREST OF CDN INDUSTRY. SWEDEN IS A HIGHLY INDUSTRIALIZED COUNTRY USING THE LATEST TECH. IN DATA PROCESSING, DATA COMMUN'NS, ROBOTICS, AND PROCESS CONTROL AUTOMATION. THE SWEDISH BUSINESS COMMUNITY HAS A GREAT DEAL OF EXPERIENCE IN INT'L TRADE & INVESTMENT. EVIDENCE OF THESE CHARACTERISTICS IS SEEN IN THE PLANS FOR LAUNCHING SEVERAL SWEDISH COMMERCIAL SATELLITES PRIMARILY TO IMPROVE WORLDWIDE COMMUN'NS OF SWEDISH FIRMS WITH THEIR OVERSEAS AFFILIATES. SWEDEN IS THE 10TH LARGEST SOURCE OF DIRECT FOREIGN INVSTMT IN CDA, WITH OVER 100 SWEDISH SUBSIDIARIES IN OPERATION. SWEDISH IND. OFFERS OPPORTS FOR THE SALE OF CDN TECH, & FOR THE ACQUISITION OF SWEDISH TECH. BY CDN INDUSTRY. FOR SALES, CDN SUPPLIERS MUST BE PREPARED TO DEVOTE APPROPRIATE ATTENTION & RESOURCES TO WINNING THE CONFIDENCE & APPROVAL OF SWEDISH IMPORTERS, IN THE FACE OF STIFF COMPETITION. THE SWEDE'S ARE HIGHLY SELECTIVE IN THE CHOICE OF SUPPLIERS, PROD. SPECIFICATION, PRICE, & TERMS OF SALE. SALES TO SWEDEN FOR CDN FIRMS CAN INCLUDE THE SUPPLY OF COMPONENTS OF LARGER SYSTEMS TO SWEDISH MULTINAT'LS WHERE THE OVERALL SYSTEM WILL BE SOLD TO A 3RD COUNTRY.

Export and Investment Promotion Planning System

REPT: SYN-GEO 87/88 A. Post export program priorities

Region: WESTERN EUROPE

Mission: 432 STOCKHOLM

Market: 507 SWEDEN

The Mission selected the following sectors as priority areas for export promotion activities for the coming fiscal year:

1. 005 COMM. & INFORM. EQP. & SERV

REASONS: LARGEST INSTALLED BASE OF MOBILE PHONES IN REGION, PROCEEDING WITH NMT900 NETWORK, WITH ERICSSON LEADING PROD DEV. AND SERVICES TO CREATE NORDIC MKT GROWTH, ESA GROUND STATION OPERATOR

2. 006 ELECTRONICS EQUIP. & SERV

REASONS: REGIONAL LEADER IN IND'L AUTOMA'N & ROBOTICS, & IN PER CAPITA INSTAL'N OF COMPUTER TERMINALS, OFFERING MKT FOR SYSTEM COMPONENT SALES IN REGION AND THROUGH SWE MULTINATIONALS.

3. 004 DEFENCE PROGRAMS, PRODUCTS, SERV

REASONS: CONTINUED PENTRA'N OF TERRIT'AL WATERS BY SOVIET SUBMAR AND EVOLVING REGNL STRATEGY OF NATO-SOVIET UNION OFFERS OPPORT. FOR ASW EQPT. & SRVCES MOU ON COOP. IN DEV. OF BATTLEFIELD CLOTHING & EQUIPMENT.

4. 013 CONSUMER PRODUCTS

REASONS: HIGH DISPOSABLE SWEDISH INCOMES AND DECREASE IN KRONOR-CDN\$ EXCHANGE RATE OFFERS POTENTIAL FOR FURS, ACTIVE SPORTSWEAR, & SPORTS EQPT. STRONG INTEREST BY SWEDES IN RECORDED MUSIC FM CDA INCL. CD RECORDINGS

The most important current Canadian export sectors to this market are (based on actual export sales):

1. 002 FISHERIES, SEA PRODUCTS & SERV.
2. 007 POWER & ENERGY EQUIP. & SERV.
3. 009 FOREST PRODUCTS, EQUIP, SERVICES
4. 010 MINE, METAL, MINERAL PROD & SRV

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 432 STOCKHOLM

Market: 507 SWEDEN

Sector: 002 FISHERIES, SEA PRODUCTS & SERV.

Subsector: 021 FISH & SHELLFISH & OTHER PROD

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	160.00M	\$ 142.00M	\$ 130.00M	\$ 122.00M
Canadian Exports \$	12.60M	\$ 12.30M	\$ 11.80M	\$ 13.30M
Canadian Share of Import Market	7.90%	8.50%	9.10%	10.90%

Major Competing Countries

Market Share

i) 507 SWEDEN	051 %
ii) 577 UNITED STATES OF AMERICA	006 %
iii) 093 DENMARK	016 %
iv) 354 NETHERLANDS	005 %
v) 410 NORWAY	015 %
vi) 504 FINLAND	003 %

Cumulative 3 year export potential for CDN products
in this Sector/Subsector: 30-60 \$M

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) PACIFIC SALMON	\$ 23.60 M
ii) EELS	\$ 1.60 M
iii) FRESHWATER LAKETROUT/WHITEFISH	\$ 3.50 M
iv) HALIBUT	\$ 2.40 M
v) GREYSOLE FILLETS	\$ 1.10 M
vi) SCALLOPS	\$ 1.30 M
vii) SQUID	\$ 0.10 M

The Trade Office reports that the following factors influence Canadian
export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

Export and Investment Promotion Planning System

MISSION: 432 STOCKHOLM

COUNTRY: 507 SWEDEN

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- the apparent limited sectoral capability in Canada compared to other competing export countries

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- support provided by the PEMD program
- participation in trade fairs
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: MAINTAIN & UP-GRADE STATUS OF CDN PACIFIC SALMON VIS-A-VIS BALTIC SALMON & NORDIC FARMED FISH, MONITOR MKT DEVELOPMENTS & WORK WITH SWEDISH BUYERS TO IDENTIFY SOURCES IN CDA FOR FISHERIES PRODUCTS, & ASSIST CDN SUPPLIERS IN NEGOTIATIONS WITH LOCAL BUYERS.

Results Expected: MAINTAIN CDN SHARE OF GROWING SWEDISH MARKET FOR FISHERIES AND SEA PRODUCTS.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: POST RECEIVED 2 VIDEO CASSETTES "WILD PACIFIC SALMON". PLANS TO SHOW CASSETTES IN COLLABORATION WITH LOCAL CDN SALMON AGENTS TO MEDIA, CATERING & RETAIL TRADE TO EMPHASIZE SUPERIORITY OF WILD SALMON OVER FARMED FISH.

Results Expected: INCREASED AWARENESS OF CDN PRODUCT AND INCREASED SALES.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 432 STOCKHOLM

Market: 507 SWEDEN

Sector: 002 FISHERIES, SEA PRODUCTS & SERV.

Subsector: 022 PROCESSED FISH & SHELLFISH

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	244.00M	\$ 232.00M	\$ 204.00M	\$ 203.00M
Canadian Exports \$	9.00M	\$ 8.50M	\$ 8.30M	\$ 7.70M
Canadian Share of Import Market	3.80%	3.60%	4.00%	3.80%

Major Competing Countries

Market Share

i) 410 NORWAY	039 %
ii) 093 DENMARK	018 %
iii) 096 GREENLAND	008 %
iv) 548 TURKEY	007 %
v) 520 THAILAND	005 %
vi) 405 ICELAND	003 %

Cumulative 3 year export potential for CDN products
in this Sector/Subsector: 30-60 \$M

Current status of Canadian exports: Well established and growing

Products/services for which there are
good market prospects

Current Total Imports

	In Canadian \$
i) SHRIMP-COOKED SHELL-OFF	\$ 32.80 M
ii) SHRIMP-COOKED SHELL-ON	\$ 32.20 M
iii) ROE-FRESHWATER FISH CURED	\$ 14.70 M
iv) CRABMEAT - COOKED FROZEN	\$ 2.20 M
v) LOBSTER-COOKED IN BRINE FROZEN	\$ 3.30 M
vi) LOBSTERMEAT - CANNED	\$ 1.00 M
vii) SALMON - CANNED	\$ 0.00 M
viii) HERRING - BARRELLED CURED	\$ 6.90 M
ix) CRABMEAT - CANNED	\$ 3.40 M

Export and Investment Promotion Planning System

MISSION: 432 STOCKHOLM

COUNTRY: 507 SWEDEN

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- the apparent limited sectoral capability in Canada compared to other competing export countries

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- support provided by the PEMD program
- participation in trade fairs
- competitive export pricing for this market

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: ACTIVITIES ARE EXPLICITLY RESPONSIVE IN THIS SECTOR ON-GOING EFFORTS ARE MADE TO FURNISH LOCAL ENQUIRERS WITH "NEW" AND ADDITIONAL SOURCES.

Results Expected:

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 432 STOCKHOLM

Market: 507 SWEDEN

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	233.00M	\$ 212.00M	\$ 199.00M	\$ 107.00M
Canadian Exports \$	6.00M	\$ 5.00M	\$ 2.00M	\$ 1.00M
Canadian Share of Import Market	2.60%	2.40%	1.00%	0.90%

Major Competing Countries

Market Share

i) 507 SWEDEN	085 %
ii) 577 UNITED STATES OF AMERICA	008 %
iii) 051 UNITED KINGDOM	003 %
iv) 128 GERMANY WEST	002 %
v) 410 NORWAY	001 %

Cumulative 3 year export potential for CDN products
in this Sector/Subsector: 30-60 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) ASW EQUIPMENT	\$ 10.00 M
ii) AIRCRAFT ELECTRONICS	\$ 15.00 M
iii) RADAR SYSTEMS	\$ 10.00 M
iv) NBC PROTECTION EQUIPMENT	\$ 2.00 M
v) FIRE COMMAND SYSTEMS	\$ 10.00 M
vi) C3 AND TELECOMMUNICATIONS	\$ 5.00 M

Projects or portion of projects which are still in the planning
stage and for which Canadian companies might have reasonable prospects.

- i) Project Name: JAS 39 MULTI-PURPOSE AIRCRAFT
Approximate Value: \$ 3500 M
Financing Source: 012 DDM
For further info. please contact:
STOCKHOLM/ROENNE CDN EMBASSY TLX:10687

Export and Investment Promotion Planning System

MISSION: 432 STOCKHOLM

COUNTRY: 507 SWEDEN

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

ii) Project Name: MEDIUM-HEAVY HELICOPTERS

Approximate Value: \$ 100 M

Financing Source: 012 DOM

For further info. please contact:

STOCKHOLM/ROENNE M. RONNE CDN. EMB. STOCK. TLX 10687

iii) Project Name: MULTI-PURPOSE ARMoured VEHICLE

(STRIDSFORDON 90)

Approximate Value: \$ 500 M

Financing Source: 012 DOM

For further info. please contact:

STOCKHOLM/ROENNE CDN EMBASSY TLX: 10687

iv) Project Name: COAST ARTILLERY COMBAT COMMAND SYSTEM

(STRIKA 85)

Approximate Value: \$ 200 M

Financing Source: 012 DOM

For further info. please contact:

M. RONNE CDN EMBASSY STOCKHOLM TLX 10687

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- exports of certain products or services to this country are subject to Canadian export controls
- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- the apparent limited sectoral capability in Canada compared to other competing export countries
- non-tariff protectionist measures which are difficult to overcome

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade fairs
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada
- the existence of a bilateral economic/trade arrangement between Canada and this country

Export and Investment Promotion Planning System

MISSION: 432 STOCKHOLM

COUNTRY: 507 SWEDEN

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: MONITOR EVALUATION OF C-TECH ASW EQUIPMENT

Results Expected: POSSIBLE CONTRACT FOR 24 SYSTEMS

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ONGOING LIAISON WITH FMV TO IDENTIFY NEW OPPORTUNITIES

Results Expected: IDENTIFICATION OF AT LEAST 2 SUITABLE POTENTIAL CANADIAN SUPPLIERS.

Activity: MONITOR PROGRESS OF JAS GROUP

Results Expected: IDENTIFICATION OF AT LEAST 2 SUITABLE POTENTIAL CANADIAN SUPPLIERS.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 432 STOCKHOLM

Market: 507 SWEDEN

Sector: 005 COMM. & INFORM. EGP. & SERV

Subsector: 053 TELECOMMUNICATIONS (INC SPACE)

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	500.00M	\$ 500.00M	\$ 471.00M	\$ 390.00M
Canadian Exports \$	13.00M	\$ 10.00M	\$ 9.00M	\$ 5.00M
Canadian Share of Import Market	3.00%	2.00%	2.00%	1.00%

Major Competing Countries

Market Share

i) 507 SWEDEN	070 %
ii) 265 JAPAN	026 %
iii) 504 FINLAND	016 %
iv) 577 UNITED STATES OF AMERICA	015 %
v) 051 UNITED KINGDOM	014 %
vi) 093 DENMARK	010 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 30-60 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) DIGIAL RADIO COM.	\$ 50.00 M
ii) PABX	\$ 20.00 M
iii) DATA COM. PRODUCTS	\$ 50.00 M
iv) CELLULAR RADIO	\$ 100.00 M
v) OPTICAL FIBRE	\$ 30.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

Export and Investment Promotion Planning System

MISSION: 432 STOCKHOLM

COUNTRY: 507 SWEDEN

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- the unsuitability of Canadian products for this market
- the apparent limited sectoral capability in Canada compared to other competing export countries
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- non-tariff protectionist measures which are difficult to overcome

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

- the adequacy of exporter information in Canadian Directories
- sourcing assistance from Canadian federal/provincial governments departments
- product/service information from Canadian companies

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: COVER NORDIC MOBILE DIGITAL RADIO SHOW, IN STOCKHOLM OCT. 87

Results Expected: PREPARE PLAN FOR THE PARTICIPATION AT NEXT EVENT.

Activity: ASSIST DATA RADIO TO SELECT AGENT FOR SWEDEN.

Results Expected: AGENT SELECTION.

Export and Investment Promotion Planning System

MISSION: 432 STOCKHOLM

COUNTRY: 507 SWEDEN

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: PROVIDE INFO ON DEVELOPMENT OF CELLULAR RADIO MARKET TO INTERESTED CANADIAN FIRMS (NOVATEL, MDI, ETC.)

Results Expected: FIRMS TO DECIDE WHETHER OR NOT TO ADAPT EQUIPMENT TO MARKET.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: PLAN CANADIAN PRESENCE AT NORDIC MOBILE DIGITAL RADIO SHOW 87.

Results Expected: MISSION TO SHOW AND/OR INFO BOOTH.
(PROVINCIAL OR FEDERAL).

Activity: ARRANGE TECHNICAL JOURNALIST VISIT TO CANADA TO COVER TELECOMMUNICATIONS.

Results Expected: INCREASE AWARENESS OF CANADIAN EXPERTISE.

Activity: IDENTIFY GOOD SWEDISH AGENTS IN DATA COMMUNICATIONS FIELD.

Results Expected: 3 NEW AGENTS FOR CANADIAN DATACOM FIRMS.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 432 STOCKHOLM

Market: 507 SWEDEN

Sector: 005 COMM. & INFORM. EGP. & SERV

Subsector: 054 COMPUTERS, SOFTWARE & SYSTEMS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1700.00M	\$ 1700.00M	\$ 1610.00M	\$ 1316.00M
Canadian Exports \$	14.00M	\$ 11.00M	\$ 8.00M	\$ 7.00M
Canadian Share of Import Market	0.82%	0.64%	0.49%	0.53%

Major Competing Countries

Market Share

i) 507 SWEDEN	030 %
ii) 577 UNITED STATES OF AMERICA	037 %
iii) 265 JAPAN	014 %
iv) 128 GERMANY WEST	014 %
v) 051 UNITED KINGDOM	010 %
vi) 112 FRANCE	010 %

Cumulative 3 year export potential for CDN products
in this Sector/Subsector: 60-100 \$M

Current status of Canadian exports: Well established and growing

Products/services for which there are
good market prospects

Current Total Imports

	In Canadian \$
i) PC SOFTWARE (GEN)	\$ 100.00 M
ii) WORD PROCESSING	\$ 50.00 M
iii) COMPUTER PERIPHERALS	\$ 200.00 M
iv) LIBRARY/FINANCIAL SYSTEMS	\$ 20.00 M
v) MAIN FRAME SOFTWARE	\$ 100.00 M
vi) DATA-BASE SERVICES	\$ 20.00 M
vii) VIDEOTEXT	\$ 40.00 M

The Trade Office reports that the following factors influence Canadian
export performance in this market for this sector (sub-sector).

- exports of certain products or services to this country are subject to Canadian export controls
- the degree of import duty protection of local industry tends to be low

Export and Investment Promotion Planning System

MISSION: 432 STOCKHOLM

COUNTRY: 507 SWEDEN

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- the unsuitability of Canadian products for this market
- the apparent limited sectoral capability in Canada compared to other competing export countries
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: CONTINUED DEVELOPMENT OF AGENCY CONTACTS THROUGH ON-SITE VISITS.

Results Expected: 10-20 AGENCIES.

Activity: ARRANGE FOR SWEDEGRAPHIC VISIT TO CANADA, INCOMING BUYER PROGRAM (ONT. OR FEDERAL GOVERNMENT).

Results Expected: YEARLY SALES OF VIDEOTEX EQUIPMENT OF .5 TO 1 MILLION.

Activity: IDENTIFY AGENTS/DISTRIBUTORS IN MALMO, GOTHENBURG.

Results Expected: BETTER GEOGRAPHICAL COVERAGE.

Export and Investment Promotion Planning System

MISSION: 432 STOCKHOLM

COUNTRY: 507 SWEDEN

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: IDENTIFY PROPER VENUE (TRADE MISSION, FAIR) FOR COMPUTER PERIPHERAL MISSION TO SWEDEN.

Results Expected: MISSION TO SWEDEN.

Activity: IDENTIFY SOFTWARE AGENCIES LOOKING FOR NEW PRODUCTS (PC LEVEL).

Results Expected: 5 NEW AGENCIES.

Activity: SELECT AND PROMOTE PARTICIPATION AT DATA OFFICE ENVIRONMENT SHOW, STOCKHOLM, OCT. 87

Results Expected: MISSION AND/OR INFO BOOTH.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 432 STOCKHOLM

Market: 507 SWEDEN

Sector: 005 COMM. & INFORM. EQP. & SERV

Subsector: 056 ELECTRONIC COMPONENTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	800.00M	\$ 800.00M	\$ 782.00M	\$ 678.00M
Canadian Exports \$	16.00M	\$ 13.00M	\$ 10.00M	\$ 9.00M
Canadian Share of Import Market	2.00%	2.00%	1.00%	1.00%

Major Competing Countries

Market Share

i) 507 SWEDEN	020 %
ii) 577 UNITED STATES OF AMERICA	040 %
iii) 265 JAPAN	020 %
iv) 128 GERMANY WEST	010 %
v) 051 UNITED KINGDOM	010 %
vi) 112 FRANCE	008 %

Cumulative 3 year export potential for CDN products
in this Sector/Subsector: 30-60 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are
good market prospects

Current Total Imports

i) SEMI-CONDUCTORS	In Canadian \$
ii) PRINTED CIRCUIT BOARDS	\$ 100.00 M
iii) CONNECTORS	\$ 100.00 M
	\$ 50.00 M

The Trade Office reports that the following factors influence Canadian
export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector
(sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- the apparent limited sectoral capability in Canada compared to other competing export countries
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

Export and Investment Promotion Planning System

MISSION: 432 STOCKHOLM

COUNTRY: 507 SWEDEN

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

- the adequacy of exporter information in Canadian Directories
- sourcing assistance from Canadian federal/provincial governments departments
- product/service information from Canadian companies

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: CONTINUED PROMOTION OF CANADIAN FIRMS IN ERICSSON SPHERE VIA LLAD PROGRAM.

Results Expected: 3 TO 5 NEW BUYING CONNECTIONS.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ASSIST INTRODUCTION OF NEW SEMICONDUCTOR PRODUCTS.

Results Expected: DESIGNED INTO NEXT GENERATION ERICSSON PABX PRODUCTS

Activity: PROMOTION OF CDN CIRCUIT BOARD PRODUCTS.

Results Expected: YEARLY SALES OF \$1 MILLION IN SWEDEN.

Activity: CONTINUED WORK ON SALE OF ELECTRONICS PRODUCTION EQUIPMENT.

Results Expected: INTRODUCTORY SALE TO AT LEAST 1 MAJOR FIRM.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 432 STOCKHOLM

Market: 507 SWEDEN

Sector: 006 ELECTRONICS EQUIP. & SERV

Subsector: 062 INSTRUMENTATION

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	798.00M	\$ 699.00M	\$ 485.00M	\$ 436.00M
Canadian Exports \$	7.00M	\$ 5.00M	\$ 3.00M	\$ 2.00M
Canadian Share of Import Market	0.90%	0.70%	0.60%	0.50%

Major Competing Countries

Market Share

i) 507 SWEDEN	50 %
ii) 128 GERMANY WEST	16 %
iii) 577 UNITED STATES OF AMERICA	13 %
iv) 052 ENGLAND	5 %
v) 512 SWITZERLAND	4 %

Cumulative 3 year export potential for CDN products
in this Sector/Subsector: 30-60 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are
good market prospects

Current Total Imports

	In Canadian \$
i) RADIATION DETECTION	\$ 4.00 M
ii) EXPLOSIVES DETECTION	\$ 0.00 M
iii) NAVIGATION EQUIPMENT	\$ 21.70 M
iv) PROD. EQUIPMENT FOR CIRCUIT BOARDS	\$ 10.00 M

Projects or portion of projects which are still in the planning
stage and for which Canadian companies might have reasonable prospects.

- i) Project Name: MACHINE READABLE PASSPORTS
Approximate Value: \$ 10 M
Financing Source: O12 DOM
For further info. please contact:
MARC LEPAGE CDN EMBASSY STOCKHOLM TLX:10687

Export and Investment Promotion Planning System

MISSION: 432 STOCKHOLM

COUNTRY: 507 SWEDEN

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade missions
- use of provincial governments export promotion activities
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: ASSIST INTRODUCTION OF BOMB DESTRUCTION/DISPOSAL EQUIPMENT TO SWEDEN.

Results Expected: DEMO SYSTEM THIS YEAR SALES IN 87-88.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: MONITOR MARKET OPPORTUNITIES FOR MICRONAV/CANADIAN MARCONI ETC. NAVIGATION/LANDING SYSTEMS FOR SMALL AIRPORTS/AIRCRAFT.

Results Expected: IDENTIFICATION OF EXPORT OPPORTUNITIES.

Activity: INTRODUCTION OF OPTICAL READING EQUIPMENT/TECHNOLOGY (ESP. FOR MACHINE READABLE PASSPORTS)

Results Expected: INFLUENCE SWEDISH AUTHORITIES TO INTRODUCE TECHNOLOGY

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 432 STOCKHOLM

Market: 507 SWEDEN

Sector: 007 POWER & ENERGY EQUIP. & SERV.

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1097.00M	\$ 997.00M	\$ 729.00M	\$ 679.00M
Canadian Exports \$	4.00M	\$ 3.00M	\$ 2.00M	\$ 1.00M
Canadian Share of Import Market	0.40%	0.30%	0.30%	0.10%

Major Competing Countries

Market Share

i) 507 SWEDEN	050 %
ii) 128 GERMANY WEST	016 %
iii) 504 FINLAND	005 %
iv) 577 UNITED STATES OF AMERICA	004 %
v) 051 UNITED KINGDOM	003 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 5-15 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

i) NUCLEAR REACTOR SERVICING

Current Total Imports
In Canadian \$
\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low
- approval of technical standards can present problems in the case of some imported products

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies

Export and Investment Promotion Planning System

MISSION: 432 STOCKHOLM

COUNTRY: 507 SWEDEN

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- No factors reported by mission

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: FOLLOW UP GOV'T PLANS FOR ADDITIONAL WIND ENERGY TEST PLANTS

Results Expected: IDENTIFICATION OF POSSIBLE EXPORT OPPORTUNITIES.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: MONITOR PERFORMANCE OF SWEDEN'S NUCLEAR POWER PROGRAMME.

Results Expected: IDENTIFICATION OF POSSIBLE EXPORT OPPORTUNITIES.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 432 STOCKHOLM

Market: 507 SWEDEN

Sector: 008 TRANSPORT SYS, EQUIP, COMP, SERV.

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	5785.00M	\$ 5169.00M	\$ 3718.00M	\$ 3235.00M
Canadian Exports \$	26.00M	\$ 23.00M	\$ 18.00M	\$ 20.00M
Canadian Share of Import Market	0.50%	0.40%	0.50%	0.60%

Major Competing Countries

Market Share

i) 507 SWEDEN	047 %
ii) 128 GERMANY WEST	021 %
iii) 577 UNITED STATES OF AMERICA	008 %
iv) 265 JAPAN	005 %
v) 051 UNITED KINGDOM	005 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) AUTO PARTS AND ACCESSORIES	\$ 1066.80 M
ii) AIRCRAFT ELECTRONICS AND COMPONENTS	\$ 132.40 M
iii) AIRCRAFT ENGINE COMPONENTS	\$ 140.50 M
iv) COMMUTER AIRCRAFT	\$ 40.20 M
v) SKIDOO'S	\$ 10.70 M
vi) TRAIN CONTROL SYSTEMS	\$ 0.70 M
vii) NAVIGATION AIDS/SYSTEMS	\$ 0.00 M
viii) SIMULATORS	\$ 4.30 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low
- approval of technical standards can present problems in the case of some imported products

Export and Investment Promotion Planning System

MISSION: 432 STOCKHOLM

COUNTRY: 507 SWEDEN

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- the unsuitability of Canadian products for this market
- non-tariff protectionist measures which are difficult to overcome

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: MONITOR DEVELOPMENTS OF NEW RESCUE BOARD TO IDENTIFY INTEREST IN WATER BOMBERS AND BEST WAY OF INTRODUCING THEM TO SWEDEN.

Results Expected: WATER BOMBER ON TRIAL.

Activity: FOLLOW UP EFFORTS TO INTRODUCE CDN SUBWAY TRAIN CONTROL/INFORMATION SYSTEM TO SL.

Results Expected: VISIT BY SL PERSONNEL TO ALRT IN VANCOUVER.

Activity: FOLLOW UP CONTACTS MADE BY CANADIAN AVIONICS COMPANIES RE SWEDISH DISTRIBUTORS.

Results Expected: TWO DISTRIBUTION AGREEMENTS COMPLETED BY EARLY 1987.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: LIAISE WITH SAS AND LINJEFLYG ON THEIR PLANS FOR MIDSIZE (PASS) COMMUTER AIRCRAFT.

Results Expected: REVITALIZED INTEREST IN DASH 8 (300 SERIES).

Export and Investment Promotion Planning System

MISSION: 432 STOCKHOLM

COUNTRY: 507 SWEDEN

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: GENERAL LIAISON WITH SWEDISH VEHICLE MANUFACTURERS.

Results Expected: INCREASED MARKET AWARENESS AND ABILITY TO IDENTIFY EXPORT OPPORTUNITIES.

Activity: MONITOR CIVIL AVIATION AUTHORITIES PLANS TO UPGRADE AND EXPAND CIVILIAN AIRPORTS.

Results Expected: IDENTIFICATION OF EXPORT OPPORTUNITIES.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 432 STOCKHOLM

Market: 507 SWEDEN

Sector: 009 FOREST PRODUCTS, EQUIP, SERVICES

Subsector: 092 WOOD AND WOOD PRODUCTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	800.00M	\$ 720.00M	\$ 595.00M	\$ 493.00M
Canadian Exports \$	8.00M	\$ 7.20M	\$ 7.40M	\$ 6.80M
Canadian Share of Import Market	1.00%	1.00%	1.20%	1.40%

Major Competing Countries

Market Share

i) 507 SWEDEN	090 %
ii) 093 DENMARK	001 %
iii) 553 UNION OF SOVIET SOC REP	001 %
iv) 504 FINLAND	002 %
v) 099 POLAND	001 %
vi) 410 NORWAY	001 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 5-15 \$M

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) SOFTWOOD PLYWOOD	\$ 22.30 M
ii) OAK, SAWN	\$ 15.70 M
iii) OAK, VENEER	\$ 8.60 M
iv) OTHER HARDWOOD VENEER EXCL. BIRCH, MAHOGANY, TEAK	\$ 13.80 M
v) MAPLE, SAWN	\$ 5.70 M
vi) ASH, SAWN	\$ 1.60 M
vii) HEMLOCK, SAWN	\$ 0.70 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- there are import restrictions which can present significant problems

Export and Investment Promotion Planning System

MISSION: 432 STOCKHOLM

COUNTRY: 507 SWEDEN

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- other factor(s) described by the Trade Office as follows:
LOCAL PHYTOSANITARY CONCERNS RE-POSSIBILITY OF PINWOOD NEMATODE
B. XYLOPHILUS BEING HARMFUL TO LOCAL FOREST STANDS/FOR TOTAL BAN
MAY '86 ON IMPORTED OVERSEAS SOFTWOOD CHIPS, NOT EVEN ALLOWING TEM-
PORARY LIFTING OF BAN DURING COLD MONTHS UNTIL RESULTS OF SWEDISH

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- competitive export pricing for this market

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: POST HAS DEVOTED CONSIDERABLE TIME ON NEGOTIATION BETWEEN LOCAL PLANT HEALTH AUTHOR & AGCAN WITH RESPECT TO IMPORT BAN ON WOOD-CHIPS JOINT COAL SWEDEN RESEARCH INVESTIG. STILL ON-GOING.

Results Expected: TEMPORARY LIFTING OF BAN FOR WINTER MONTHS. IF SUCCESSFUL, MARKET IN 87/88 SHOULD OFFER GOOD OPPORTUNITIES FOR CDN PRODUCTS.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: MAINTAIN CLOSE CONTACT WITH LOCAL HARDWOOD & SAWN LUMBER TRADE TO IDENTIFY NEW OPPORTUNITIES.

Results Expected: INCREASE LOCAL COGNIZANCE OF CANADA'S STRONG CAPABILITY TO SUPPLY HIGH QUALITY HARDWOOD LUMBER.

Activity: MONITOR TRADE DEVELOPMENTS IN THE AREA OF VENEER & SOFTWOOD PLYWOOD TO IDENTIFY BUSINESS OPPORTUNITIES AS THEY ARISE.

Results Expected: INCREASE LOCAL COGNIZANCE OF CANADA'S STRONG CAPABILITY TO SUPPLY HIGH QUALITY VENEER & SOFTWOOD PLYWOOD.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 432 STOCKHOLM

Market: 507 SWEDEN

Sector: 009 FOREST PRODUCTS, EQUIP, SERVICES

Subsector: 096 EQUIPMENT AND MACHINERY

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	315.00M	\$ 262.00M	\$ 211.00M	\$ 127.00M
Canadian Exports \$	2.50M	\$ 2.10M	\$ 1.60M	\$ 0.30M
Canadian Share of Import Market	0.80%	0.80%	0.80%	0.20%

Major Competing Countries

Market Share

i) 507 SWEDEN	050 %
ii) 128 GERMANY WEST	017 %
iii) 504 FINLAND	013 %
iv) 051 UNITED KINGDOM	006 %
v) 265 JAPAN	004 %

Cumulative 3 year export potential for CDN products
in this Sector/Subsector: 15-30 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) PAPER MACHINE CONTROL SYSTEMS	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian
export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector
(sub-sector) in this market is lower than optimum mainly because of:

- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies

Export and Investment Promotion Planning System

MISSION: 432 STOCKHOLM

COUNTRY: 507 SWEDEN

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: WORK WITH SENTROL TO UTILIZE THEIR NEW AGREEMENT WITH VALMET.

Results Expected: INCREASED MARKET PROSPECTS AND ADDITIONAL EXPORT OPPORTUNITIES.

Activity: MONITOR NEW DEVELOPMENTS IN SWEDISH PULP AND PAPER INDUSTRY.

Results Expected: INCREASED ABILITY TO IDENTIFY EXPORT PROSPECTS.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: LIAISE WITH DEVRON HERCULES' DISTRIBUTOR JOH. SJO.

Results Expected: IDENTIFY MARKET PROSPECTS AND ADDITIONAL EXPORT OPPORTUNITIES.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 432 STOCKHOLM

Market: 507 SWEDEN

Sector: 010 MINE, METAL, MINERAL PROD & SRV

Subsector: 106 EQUIPMENT AND MACHINERY

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	83.00M	\$ 79.00M	\$ 61.00M	\$ 60.00M
Canadian Exports \$	0.30M	\$ 0.50M	\$ 0.40M	\$ 0.00M
Canadian Share of Import Market	0.36%	0.63%	0.65%	0.00%

Major Competing Countries

Market Share

i) 507 SWEDEN	050 %
ii) 128 GERMANY WEST	013 %
iii) 504 FINLAND	006 %
iv) 237 ITALY	005 %
v) 577 UNITED STATES OF AMERICA	005 %

Cumulative 3 year export potential for CDN products
in this Sector/Subsector: 3-5 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are
good market prospects

Current Total Imports

i) PELLET SCREENING ROLLERS	\$ 0.00 M
ii) MINE MANAGEMENT SYSTEMS	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian
export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector
(sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- the apparent limited sectoral capability in Canada compared to other competing export countries

Export and Investment Promotion Planning System

MISSION: 432 STOCKHOLM

COUNTRY: 507 SWEDEN

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- No factors reported by mission

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: MAINTAIN CONTACT WITH LKAB RE PELLET SCREENING ROLLERS AND MINE MANAGEMENT SYSTEMS.

Results Expected: INCREASED AWARENESS OF MARKET CONDITIONS AND ABILITY TO IDENTIFY EXPORT OPPORTUNITIES.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 432 STOCKHOLM

Market: 507 SWEDEN

Sector: 013 CONSUMER PRODUCTS

Subsector: 133 CULTURE INDUSTRIES

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	44.00M	\$ 40.00M	\$ 41.00M	\$ 33.00M
Canadian Exports \$	8.00M	\$ 6.00M	\$ 4.00M	\$ 1.00M
Canadian Share of Import Market	19.00%	15.00%	10.00%	3.00%

Major Competing Countries

Market Share

i) 507 SWEDEN	050 %
ii) 577 UNITED STATES OF AMERICA	022 %
iii) 128 GERMANY WEST	022 %
iv) 354 NETHERLANDS	020 %
v) 051 UNITED KINGDOM	010 %
vi) 093 DENMARK	003 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 15-30 \$M

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects

Current Total Imports

In Canadian \$

i) RECORDS AND TAPES	\$ 30.00 M
ii) COMPACT DISCS	\$ 10.00 M
iii) FILM & T.V. PROGRAMMING	\$ 4.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- the apparent limited sectoral capability in Canada compared to other competing export countries
- non-tariff protectionist measures which are difficult to overcome
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

Export and Investment Promotion Planning System

MISSION: 432 STOCKHOLM

COUNTRY: 507 SWEDEN

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

- the adequacy of exporter information in Canadian Directories
- product/service information from Canadian companies

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: INCOMING BUYER (NORDISC GRAMMOFON) TO VISIT CANADIAN RECORD COMPANIES (ONT. SPONSORED).

Results Expected: REPRESENT CDN RECORD FIRMS IN NORDIC AREA.
YEARLY SALES .5 TO 1 M. STARTING 1987.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: WORK IN COORDINATION WITH MAJOR BUYERS (AHLENS) CDN EXPORTER (EXILE RECORDS) & VARIOUS GOVERNMENT (ONT. & FEDERAL) TO COUNTERACT SWEDISH RECORD INDUSTRY ATTEMPT TO SQUEEZE OUT CANADIAN IMPORTS.

Results Expected: MAINTAIN PRESENT LEVEL OF EXPORTS.

Activity: PREPARE/OBTAIN LIST OF CANADIAN EXPORTERS OF T.V. AND FILM PRODUCTS AND PROVIDE TO EMERGING CABLE T.V. INDUSTRY.

Results Expected: INCREASED CANADIAN SALES.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 432 STOCKHOLM

Market: 507 SWEDEN

Sector: 015 CONSTRUCTION INDUSTRY

Subsector: 152 EQUIPMENT & MACHINERY

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	257.00M	\$ 229.00M	\$ 164.00M	\$ 153.00M
Canadian Exports \$	1.50M	\$ 1.00M	\$ 0.60M	\$ 0.30M
Canadian Share of Import Market	0.60%	0.40%	0.40%	0.20%

Major Competing Countries

Market Share

i) 507 SWEDEN	050 %
ii) 128 GERMANY WEST	013 %
iii) 577 UNITED STATES OF AMERICA	007 %
iv) 504 FINLAND	004 %
v) 051 UNITED KINGDOM	004 %
vi) 265 JAPAN	003 %

Cumulative 3 year export potential for CDN products
in this Sector/Subsector: 5-15 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are
good market prospects

Current Total Imports

In Canadian \$

i) ROAD GRADERS	\$ 1.50 M
ii) COMPACT LOADERS	\$ 30.20 M

The Trade Office reports that the following factors influence Canadian
export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low
- approval of technical standards can present problems in the case of some imported products

Export and Investment Promotion Planning System

MISSION: 432 STOCKHOLM

COUNTRY: 507 SWEDEN

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- the apparent limited sectoral capability in Canada compared to other competing export countries
- non-tariff protectionist measures which are difficult to overcome
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters
- other factor(s) described by the Trade Office as follows:
PREVIOUS HIGH EXCHANGE RATE COMBINE WITH DECLINING CONSTRUCTION ACTIVITY(AT A TIME WHEN CAD DOLLAR RATE DECREASED)

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: FOLLOW UP VAGVERKET'S DECISION NOT TO BUY CANADIAN GRADERS TO SEE IF THEIR CONDITIONS COUNTERVEIL GATT PROCUREMENT PROCEDURES.

Results Expected: MORE COMPREHENSIVE SPECIFICATIONS IN VAGVERKET'S PROCUREMENT IN 1987.

Activity: LIAISE WITH OLEMA TO ASSIST THEIR SALES OF CDN COMPACT LOADERS.

Results Expected: INCREASED MARKET AWARENESS OF CDN PRODUCTS COMPETITIVE ALTERNATIVE TO BOBCAT.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ASSIST CDN FIRMS IN GETTING VAGVERKET TO TEST AND EVALUATE CDN GRADER FOR 1987 PROCUREMENT.

Results Expected: SALE OF AT LEAST 5 GRADERS IN 1987.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 432 STOCKHOLM

Market: 507 SWEDEN

Sector: 016 INDUSTRIAL MACHIN. PLANTS. SERV.

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	5548.00M	\$ 4953.00M	\$ 3555.00M	\$ 3241.00M
Canadian Exports \$	26.00M	\$ 23.00M	\$ 17.00M	\$ 16.00M
Canadian Share of Import Market	0.50%	0.50%	0.50%	0.50%

Major Competing Countries

Market Share

i) 507 SWEDEN	050 %
ii) 128 GERMANY WEST	022 %
iii) 051 UNITED KINGDOM	007 %
iv) 577 UNITED STATES OF AMERICA	006 %
v) 265 JAPAN	003 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

In Canadian \$

i) FMS	\$ 0.00 M
ii) PRODUCTION MACHINERY FOR ELECTRONICS INDUSTRY	\$ 54.80 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- the apparent limited sectoral capability in Canada compared to other competing export countries
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

Export and Investment Promotion Planning System

MISSION: 432 STOCKHOLM

COUNTRY: 507 SWEDEN

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- competitive export pricing for this market

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: MONITOR INDUSTRIAL DEVELOPMENTS TO IDENTIFY BUSINESS OPPORTUNITIES AS THEY APPEAR.

Results Expected: INCREASED AWARENESS OF CANADIAN SUPPLIERS' COMPETENCE. AT LEAST 1 NEW AGENCY AGREEMENT.

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional Projects approved and planned for the coming fiscal year.		
Mission: 432 STOCKHOLM		
Sector: 005 COMM. & INFORM. EQP. & SERV		
010 FAIRS ROBOTICS MISSION TO SWEDEN SHOW	STOCKHOLM	1187
020 MISSION OUTGOING DATA COMMUNICATIONS EQPT MISS. AND SEMINAR	STOCKHOLM	1087
024 MISSION INCOMING CABLE TV MISSION		0987
MONTREAL INNATL SOFTWARE MARKET	MONTREAL	0587
SWEDISH BUYERS TO CDN EXH AT TELECOM-GENEVA	GENEVA	1087
Sector: 006 ELECTRONICS EQUIP. & SERV		
010 FAIRS ELECTRONIKA SHOW, GOTHENBURG, SWEDEN	GOTHENBURG	1187
NORDIC CAD-CAM, STOCKHOLM	STOCKHOLM	0000
DATA OFFICE ENVIRONMENT EXH., STOCKHOLM	STOCKHOLM	0987
020 MISSION OUTGOING MISSION TO CDN EXHIBIT AT TELECOM EXHIBIT, GENE GENEVA		1087
ROBOTICS MISSION TO SWEDEN		1187
DATA COMMUNICATIONS EQUIPMENT MISSION TO STOCKHOLM	STOCKHOLM	0000
DATA COMMUNICATIONS EQUIPMENT SEMINAR IN STOCKHOLM	STOCKHOLM	0000
024 MISSION INCOMING CABLE/VIDEOTEX MISSION FROM SWEDEN, IRELAND, SPAIN		0000
BUYERS FM SWEDEN TO MONTREAL INT'L SOFTWARE MARKE	MONTREAL	0587
Sector: 009 FOREST PRODUCTS, EQUIP, SERVICES		
010 FAIRS SPCI '87	STOCKHOLM	0487
Sector: 010 MINE, METAL, MINERAL PROD & SRV		
010 FAIRS ELMIA WOOD EXH., SWEDEN		0687
Sector: 013 CONSUMER PRODUCTS		
020 MISSION OUTGOING BOOK PUBLISHERS MISSION TO NORDIC	STOCKHOLM	0587
Sector: 016 INDUSTRIAL MACHIN, PLANTS, SERV.		
010 FAIRS SPCI TRADE FAIR. (PULP & PAPER) STOCKHOLM, SWEDEN	STOCKHOLM	0487

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional Projects approved and planned for the coming fiscal year.		
Mission: 432 STOCKHOLM		
Sector: 016 INDUSTRIAL MACHIN, PLANTS, SERV.		
010 FAIRS		
CABLE TV EXHIBITION, STOCKHOLM	STOCKHOLM	0587
INT'L TRADE FOR INSTRUMENTS AND MEASUREMENT, STOC	STOCKHOLM	0587
STOCKHOLM TECHNICAL FAIR (TECHNICAL MANUFACTU	STOCKHOLM	1087
SPCI '87 INT'L PULP & PAPER CONF & EXH., STOCKHOL	STOCKHOLM	0487
Sector: 999 MULTIPLE SECTORS		
010 FAIRS		
STOCKHOLM TECHNICAL FAIR	STOCKHOLM	1087
Type of Event		
Location		
Date		
Promotional projects proposed for the two following fiscal years.		
Mission: 432 STOCKHOLM		
Sector: 001 AGRI & FOOD PRODUCTS & SERVICE		
010 FAIRS		
GASTRO NORD	STOCKHOLM	0488
Sector: 005 COMM. & INFORM. EGP. & SERV		
010 FAIRS		
SOFTWARE SHOW	STOCKHOLM	0390
DATAKONTOR	STOCKHOLM	0989
SOFTWARE SHOW	STOCKHOLM	0389
Sector: 006 ELECTRONICS EQUIP. & SERV		
010 FAIRS		
ELECTRONIC PRODUCTION	STOCKHOLM	0588
Sector: 011 OIL & GAS EQUIPMENT, SERVICES		
020 MISSION OUTGOING		
OFFSHORE SHOW	GOTHENBURG	0290
Sector: 013 CONSUMER PRODUCTS		
024 MISSION INCOMING		
CSGA	MONTREAL	0289
CSGA	MONTREAL	0290

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 432 STOCKHOLM		
Sector: 013 CONSUMER PRODUCTS		
024 MISSION INCOMING		
FUR FAIR	MONTREAL	0589
FUN FAIR	MONTREAL	0590
Sector: 999 MULTIPLE SECTORS		
010 FAIRS		
TECHNICAL FAIR	STOCKHOLM	1088
TECHNICAL FAIR	STOCKHOLM	1089

Export and Investment Promotion Planning System

87/88 Trade and Economic Overview

Mission: 433 OSLO

Country: 410 NORWAY

THE NORWEGIAN ECONOMY HAS BEEN ONE OF THE FASTEST GROWING IN THE WORLD SINCE THE MID-1970'S, DUE PRIMARILY TO HIGH EXPORT EARNINGS FROM NORTH SEA OIL, WHICH ACCOUNTED FOR 21% OF STATE REVENUES IN 1985. ALTHOUGH MOST OF THE ECONOMIC INDICATORS POINT TO TOUGHER TIMES AHEAD AS A DIRECT RESULT OF THE TURBULENT OIL MARKET, NORWAY IS FACING THIS ECONOMIC BATTLE FROM THE ENVIABLE POSITION OF ZERO NATIONAL DEBT. WITH GDP GROWTH DECLINING FROM 4.4% IN 1985 TO 2.8% IN 1986, NORWAY WILL TALLY UP A BALANCE OF PAYMENT DEFICIT OF UP TO US\$5.4 BILLION IN 1986 AND AS MUCH AS US\$5.7 BILLION IN 1987. RECURRENT SPECULATION AGAINST THE KRONE PROMPTED THE NEW LABOUR GOVERNMENT TO DEVALUE BY 12% IMMEDIATELY UPON ASSUMING OFFICE IN MAY 1986. UNFORTUNATELY, WITH LITTLE SURPLUS MANUFACTURING CAPACITY TO TAKE ADVANTAGE OF HIGHER DEMAND AND WITH THE NATIONAL UNEMPLOYMENT RATE LESS THAN 2%, THE DIRECT RESULT WAS HIGHER INFLATION (9.5% IN 1986) RATHER THAN INCREASED EXPORT EARNINGS. IN OCTOBER, 1986, PRIVATE CONSUMPTION, LED BY AUTOMOBILE IMPORTS, WAS INCREASING BY 7.8% ANNUALLY DESPITE INTEREST RATES EXCEEDING 17%. NATIONAL FIGURES FOR 1985 SHOW THAT WAGES INCREASED BY 7.8% AND ARE EXPECTED TO REACH 9.5% INCREASE IN 1986. EFFECTIVE JANUARY 1, 1987, THE GENERAL WORK WEEK WILL BE REDUCED FROM 40 TO 37.5 HOURS WITH FULL COMPENSATION IN WAGES. AS A CONSEQUENCE, BEFORE ADJUSTING FOR CHANGES IN EXCHANGE RATES, PRODUCTION COSTS IN NORWAY WILL RISE BY 10% MORE THAN ITS MAIN FOREIGN COMPETITORS IN 1986 AND 1987. AS A RESULT, NORWAY MUST DEVELOP MORE EFFICIENT MEANS OF PRODUCTION IN ALL SECTORS INCLUDING OIL AND GAS THUS GIVING OPPORTUNITIES FOR CANADIAN EXPORTERS IN SEVERAL AREAS. EMBASSY EXPORT PROMOTIONAL ACTIVITY WILL CONCENTRATE IN THE FOLLOWING SECTORS: DEFENCE PROGRAMS AND PRODUCTS (INCLUDING AEROSPACE); COMPUTERS, SOFTWARE AND SYSTEMS; BROADCASTING INCLUDING CATV; TELECOMMUNICATIONS INCLUDING SPACE; FURS (APPAREL); GRAINS AND OILSEEDS.

Export and Investment Promotion Planning System

REPT: SYN-GEO 87/88 A. Post export program priorities

Region: WESTERN EUROPE

Mission: 433 OSLO

Market: 410 NORWAY

The Mission selected the following sectors as priority areas for export promotion activities for the coming fiscal year:

1. 004 DEFENCE PROGRAMS, PRODUCTS, SERV

REASONS: NORWG DEFENCE BUDGET FOR 1987 WILL ALLOCATE 22.8% OF ITS TOTAL TO MATERIEL PURCHASES INCREASING TO 25% IN 1988. 50-80% OF PURCHASES ARE FROM ABROAD.

2. 011 OIL & GAS EQUIPMENT, SERVICES

REASONS: THE OIL INDUSTRY IS NORWAY'S MAJOR SOURCE OF REVENUE & STIMULUS FOR R AND D. OPERATORS LOOKING FOR MORE EFFICIENT TECHN., TRADITIONAL SUPPLIERS WILL BE REPLACED BY INNOVATIONS IN EQUIP. AND SERVICES.

3. 005 COMM. & INFORM. EQP. & SERV

REASONS: THE NORWEGIAN PTT'S UPGRADING/MODERNIZATION PROGRAM TOGETHER WITH PARTIAL DEREGULATION OF PTT MONOPOLY IS INCREASING MARKET POTENTIAL FOR FOREIGN SUPPLIERS.

4. 003 GRAINS AND OILSEEDS

REASONS: EXPANSION OF ANIMAL FEED MARKET: SCOPE FOR INCREASING CANADIAN SHARE FOR CANOLA AS PERCENTAGE OF PROTEIN REQUIREMENT.

The most important current Canadian export sectors to this market are (based on actual export sales):

1. 010 MINE, METAL, MINERAL PROD & SRV
2. 003 GRAINS AND OILSEEDS
3. 004 DEFENCE PROGRAMS, PRODUCTS, SERV
4. 011 OIL & GAS EQUIPMENT, SERVICES
5. 005 COMM. & INFORM. EQP. & SERV

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 433 OSLO

Market: 410 NORWAY

Sector: 003 GRAINS AND OILSEEDS

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	280.00M	\$ 280.00M	\$ 268.00M	\$ 285.00M
Canadian Exports \$	30.00M	\$ 28.00M	\$ 25.00M	\$ 24.50M
Canadian Share of Import Market	10.70%	10.00%	9.30%	8.60%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	026 %
ii) 001 ARGENTINA	012 %
iii) 507 SWEDEN	010 %
iv) 128 GERMANY WEST	006 %
v) 051 UNITED KINGDOM	004 %

Cumulative 3 year export potential for CDN products
in this Sector/Subsector: 60-100 \$M

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) CEREAL GRAINS	\$ 24.20 M
ii) OILSEEDS AND PRODUCTS	\$ 0.20 M

Projects or portion of projects which are still in the planning
stage and for which Canadian companies might have reasonable prospects.

i) Project Name: ENCOURAGE THE USE OF CANOLA AS A PROTEIN
SUPPLEMENT IN ANIMAL FEED.

Approximate Value: \$ 2 M

Financing Source: 012 DOM

For further info. please contact:

T. SAETREMYR, CDN EMBASSY TLX: 56-71880 DOMCA N (OSLO)

Export and Investment Promotion Planning System

MISSION: 433 OSLO

COUNTRY: 410 NORWAY

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- there are import restrictions which can present significant problems
- the degree of import duty protection of local industry tends to be moderate
- approval of technical standards can present problems in the case of some imported products

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- non-tariff protectionist measures which are difficult to overcome

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: CONTINUING DIALOGUE WITH NORWEGIAN GRAIN CORPORATION TO PROMOTE THE USE OF CANADIAN WHEAT.

Results Expected: INCREASE IMPORTS OF CANADIAN WHEAT.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: DEVELOP CLOSER CONTACTS WITH IMPORT ORGANIZATION TO ENCOURAGE USE OF CANOLA IN ANIMAL FEED.

Results Expected: INCREASE THE USE OF CANOLA IN ANIMAL FEED.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 433 OSLO

Market: 410 NORWAY

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	680.00M	\$ 600.00M	\$ 529.00M	\$ 467.00M
Canadian Exports \$	6.00M	\$ 5.00M	\$ 8.80M	\$ 0.00M NA
Canadian Share of Import Market	0.90%	0.80%	1.70%	0.00% NA

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	040 %
ii) 128 GERMANY WEST	020 %
iii) 507 SWEDEN	020 %
iv) 051 UNITED KINGDOM	005 %
v) 112 FRANCE	005 %

Cumulative 3 year export potential for CDN products
in this Sector/Subsector: 5-15 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) SMALLER UNITS WEAPON SYSTEMS & SMALL ARMS	\$ 29.50 M
ii) QUARTERMASTERS STORES	\$ 19.70 M
iii) COMMUNICATIONS & ELECTRONIC EQUIPMENT	\$ 138.30 M
iv) AMMUNITIONS AND EXPLOSIVES	\$ 192.20 M
v) PROTECTIVE AND MEDICAL EQUIPMENT	\$ 12.60 M
vi) ENGINES AND PARTS	\$ 150.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- exports of certain products or services to this country are subject to Canadian export controls
- the degree of import duty protection of local industry tends to be low

Export and Investment Promotion Planning System

MISSION: 433 OSLO

COUNTRY: 410 NORWAY

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non-tariff protectionist measures which are difficult to overcome
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada
- the existence of a bilateral economic/trade arrangement between Canada and this country

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: LIAISON CALLS ON ALL DEFENCE-RELATED IMPORT AGENTS, PRIME CONTRACTORS AND MATERIEL COMMANDS.

Results Expected: GREATER AWARENESS IN NORWAY OF CANADIAN EXPERTISE AND NEW AGENTS FOR FIVE CANADIAN FIRMS.

Activity: FOLLOW UP WITH MINISTRY OF DEFENCE AND PRIME CONTRACTORS AS RESULT OF DISCUSSIONS AT THE MOU RDP SC MEETING.

Results Expected: INCREASE SALES OF CANADIAN DEFENCE PRODUCTS IN NORWAY TO \$6 MILLION IN 1987.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: MARKET ANALYSIS FOR DEFENCE PRODUCT SALES AND JOINT VENTURES BETWEEN CANADA AND NORWAY.

Results Expected: COMPREHENSIVE REPORT ON POTENTIAL SUBSECTORS FOR CANADIAN EXPORT DEVELOPMENT.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 433 OSLO

Market: 410 NORWAY

Sector: 005 COMM. & INFORM. EGP. & SERV

Subsector: 053 TELECOMMUNICATIONS (INC SPACE)

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	340.00M	\$ 280.00M	\$ 195.00M	\$ 95.00M
Canadian Exports \$	43.00M	\$ 26.00M	\$ 12.00M	\$ 3.00M
Canadian Share of Import Market	12.50%	9.00%	6.00%	3.00%

Major Competing Countries

Market Share

i) 507 SWEDEN	025 %
ii) 265 JAPAN	015 %
iii) 128 GERMANY WEST	011 %
iv) 237 ITALY	007 %
v) 075 CANADA	006 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects

Current Total Imports

i) PABX	In Canadian \$
ii) SWITCHING EQUIPMENT	\$ 20.00 M
	\$ 10.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be moderate

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non-tariff protectionist measures which are difficult to overcome

Export and Investment Promotion Planning System

MISSION: 433 OSLO

COUNTRY: 410 NORWAY

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: FOLLOW UP WITH MOLLER GROUP VISIT TO CDA ON ON-GOING BASIS TO ASSIST EFFORTS IN ESTABLISHING AGENCY AGREEMENT.

Results Expected: POSSIBLE ESTABLISHMENT OF TWO OR THREE AGENCY AGREEMENTS.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ATTEND NORCOM 88 IN OSLO TO INCREASE EMBASSY AWARENESS OF NORWEGIAN AGENTS AND POSSIBLE BUYERS FOR CANADIAN PRODUCTS.

Results Expected: EVENTUAL AGENCY AGREEMENTS AND INCREASED SALES.

Activity: ASSIST NORWEGIAN PTT WITH MEETINGS IN CANADA FOR GROUP POSSIBLY VISITING SOME TIME IN 1987.

Results Expected: INCREASE AWARENESS OF CANADIAN EQUIPMENT WITH RESULTING POSSIBILITY OF SALES TO NORWAY.

Activity: ATTEND TELECOM '87 IN GENEVA TO INTRODUCE NORWEGIAN DELEGATION TO CANADIAN PARTICIPANTS.

Results Expected: PRODUCT AWARENESS AND POSSIBLE AGENCY AGREEMENTS.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 433 OSLO

Market: 410 NORWAY

Sector: 005 COMM. & INFORM. EGP. & SERV

Subsector: 054 COMPUTERS, SOFTWARE & SYSTEMS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	810.00M	\$ 740.00M	\$ 650.00M	\$ 400.00M
Canadian Exports \$	9.00M	\$ 6.00M	\$ 4.00M	\$ 2.50M
Canadian Share of Import Market	1.10%	0.70%	0.60%	0.60%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	028 %
ii) 051 UNITED KINGDOM	017 %
iii) 128 GERMANY WEST	015 %
iv) 507 SWEDEN	013 %
v) 265 JAPAN	010 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 30-60 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports In Canadian \$	
i) SOFTWARE	\$ 0.00 M
ii) DATA COMMUNICATION	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be moderate

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- the apparent limited sectoral capability in Canada compared to other competing export countries
- non-tariff protectionist measures which are difficult to overcome

Export and Investment Promotion Planning System

MISSION: 433 OSLO

COUNTRY: 410 NORWAY

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- competitive export pricing for this market

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: FOLLOW UP INFORMATICS MISSION WITH ALL NORWEGIAN CONTACTS.

Results Expected: POSSIBILITY OF DEVELOPING TWO AGENCY AGREEMENTS IN NORWAY.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ATTEND SOFTWARE EXHIBITION IN OSLO (MAR/88) TO INCREASE CONTACT WITH NORWEGIAN INDUSTRY IN SOFTWARE SECTOR AND ESTABLISH POSSIBLE AGENCY INTEREST.

Results Expected: INCREASE AWARENESS OF CANADIAN CAPABILITIES AMONGST NORWEGIAN COMPANIES.

Activity: ATTEND OFFICE EQUIPMENT SHOW IN OSLO (SEP/87) TO INCREASE CONTACT WITH NORWEGIAN OFFICE EQUIPMENT MANUFACTURERS AND AGENTS. FOLLOW UP WITH INDIVIDUAL CALLS.

Results Expected: INCREASE AWARENESS OF CANADIAN CAPABILITIES.

Activity: SOFTWARE SEMINAR IN CONJUNCTION WITH MISSION AND SOFTWARE SHOW.

Results Expected: POSSIBLE SALE OF EQUIPMENT AND ESTABLISHMENT OF NEW AGENCY AGREEMENT.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 433 OSLO

Market: 410 NORWAY

Sector: 005 COMM. & INFORM. EGP. & SERV

Subsector: 055 BROADCASTING (INC CATV)

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	450.00M	\$ 420.00M	\$ 375.00M	\$ 300.00M
Canadian Exports \$	1.00M	\$ 0.50M	\$ 0.20M	\$ 1.00M
Canadian Share of Import Market	0.20%	0.10%	0.05%	0.30%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	017 %
ii) 265 JAPAN	014 %
iii) 128 GERMANY WEST	013 %
iv) 507 SWEDEN	011 %

Cumulative 3 year export potential for CDN products
in this Sector/Subsector: 1-3 \$M

Current status of Canadian exports: Market share declining

Products/services for which there are
good market prospects

Current Total Imports

i) VIDEO EQUIPMENT	\$ 0.00 M
ii) CATV EQUIPMENT	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian
export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be moderate

In the Trade Office's opinion, Canadian export performance in this sector
(sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non-tariff protectionist measures which are difficult to overcome

Export and Investment Promotion Planning System

MISSION: 433 OSLO

COUNTRY: 410 NORWAY

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- competitive export pricing for this market

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: FOLLOW UP ON MULTI-MICROWAVE DISTRIBUTION SYSTEM (MMDS) AND VISIT TO PTT.

Results Expected: POSSIBLE SALE OF EQUIPMENT AND SERVICES TO PTT.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: EXTENSIVE REVIEW OF CATV SYSTEMS IN NORWAY AND ATTEND CATV EXHIBITION IN FALL OF 1987 TO INCREASE EMBASSY CONTACTS.

Results Expected: ANALYSIS OF CURRENT STATE OF CATV SYSTEMS IN NORWAY AND RECOMMENDATIONS FOR FUTURE PROMOTIONAL ACTIVITY.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 433 OSLO

Market: 410 NORWAY

Sector: 011 OIL & GAS EQUIPMENT, SERVICES

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1600.00M	\$ 2052.00M	\$ 2020.00M	\$ 1880.00M
Canadian Exports \$	5.00M	\$ 4.50M	\$ 4.20M	\$ 4.00M
Canadian Share of Import Market	0.30%	0.20%	0.20%	0.20%

Major Competing Countries

Market Share

i) 128 GERMANY WEST	030 %
ii) 051 UNITED KINGDOM	025 %
iii) 577 UNITED STATES OF AMERICA	015 %
iv) 265 JAPAN	010 %
v) 354 NETHERLANDS	010 %
vi) 112 FRANCE	005 %

Cumulative 3 year export potential for CDN products
in this Sector/Subsector: 5-15 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are
good market prospects

Current Total Imports
In Canadian \$

i) ROV'S (SUBMARINES)	\$ 0.00 M
ii) DRILL COLLARS & SLIP RINGS	\$ 0.00 M
iii) DOWNHOLE EQUIPMENT	\$ 0.00 M
iv) FRACTURING EQUIPMENT	\$ 0.00 M
v) SAFETY EQUIPMENT	\$ 0.00 M
vi) COLD WATER TECHNOLOGY/CONSULTING	\$ 0.00 M
vii) TELECOMMUNICATIONS	\$ 0.00 M

Projects or portion of projects which are still in the planning
stage and for which Canadian companies might have reasonable prospects.

i) Project Name: ONSHORE DRILLING ON SPITZBERGEN ISLAND
(ARCTIC ENVIRONMENT)

Approximate Value: \$ M

Financing Source: 023 EDC

For further info. please contact:

D. E. CARL CANADIAN EMBASSY, OSLO

Export and Investment Promotion Planning System

MISSION: 433 OSLO

COUNTRY: 410 NORWAY

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be moderate

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- non-tariff protectionist measures which are difficult to overcome
- other factor(s) described by the Trade Office as follows:
ARTIC OFFSHORE IS READY TO START IN THE BARENTS SEA, FOR WHICH CANADIAN FIRMS HAVE PROVEN EXPERTISE IN BOTH EQUIPMENT & SERVICES IF EXPLORATION IN THE BARENTS SEA STARTS IN 1987/88, CANADIAN FIRMS SHOULD BE SUCCESSFUL.

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of provincial governments export promotion activities
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: COMPANY CALLS ON LARGEST IMPORT HOUSES AND STOCKISTS/SUPPLY DEPOTS.

Results Expected: 10 NEW AGENCIES FOR CANADIAN EXPORTERS.

Activity: CANADA-NORWAY OFFSHORE WORKING GROUP.

Results Expected: AS MORE GRASS-ROOTS FIRMS BECOME INVOLVED IN THIS BILATERAL FORUM, WE ANTICIPATE GREATER SOURCING ENQUIRIES FROM NORWEGIAN FIRMS.

Activity: FOLLOW-UP CALLS ON SPECIFIC FIRMS FOLLOWING POLAR TECHNOLOGY MISSION IN OCTOBER, 1986.

Results Expected: CONTRACTS FOR ENGINEERING SERVICES AND DESIGN IF DRILLING COMMENCES IN BARENTS SEA OR ON SPITZBERGEN ISLAND.

Export and Investment Promotion Planning System

MISSION: 433 OSLO

COUNTRY: 410 NORWAY

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: MEETINGS IN SPITZBERGEN WITH OFFSHORE DRILLING COMPANIES TO INTRODUCE EXPERTISE OF CANADIAN FIRMS IN ARCTIC ENVIRONMENT.

Results Expected: SALES AND SERVICE CONTRACTS FOR CANADIAN ONSHORE FIRMS, PRIMARILY FROM ALBERTA.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 433 OSLO

Market: 410 NORWAY

Sector: 013 CONSUMER PRODUCTS

Subsector: 131 APPAREL (CLOTH, FUR, SHOES) TEXT

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size (import) \$	43.00M	\$ 38.00M	\$ 30.00M	\$ 24.00M
Canadian Exports \$	1.50M	\$ 1.30M	\$ 1.00M	\$ 0.90M
Canadian Share of Import Market	3.50%	3.40%	3.30%	3.70%

Major Competing Countries

Market Share

i) 128 GERMANY WEST	035 %
ii) 093 DENMARK	025 %
iii) 159 GREECE	009 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 1-3 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects
i) FURS (APPAREL)

Current Total Imports
In Canadian \$
\$ 38.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be high

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

Export and Investment Promotion Planning System

MISSION: 433 OSLO

COUNTRY: 410 NORWAY

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- use of provincial governments export promotion activities
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: CALL ON MAJOR FUR IMPORTERS AND RETAIL OUTLETS TO ENSURE AWARENESS OF CANADIAN PRODUCT.

Results Expected: GREATER AWARENESS OF CANADIAN PRODUCT.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ENCOURAGE BUYERS TO ATTEND MONTREAL FUR FAIR.

Results Expected: INCREASE AWARENESS OF CANADIAN FUR PRODUCTS AMONGST NORWEGIAN BUYERS.

Activity: ARRANGE FUR SHOW AT AMBASSADOR'S RESIDENCE.

Results Expected: INCREASE AWARENESS OF CANADIAN FURS AMONGST NORWEGIAN PRESS, BUYERS AND RETAIL OUTLETS.

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional Projects approved and planned for the coming fiscal year.		
Mission: 433 OSLO		
Sector: 001 AGRI & FOOD PRODUCTS & SERVICE		
020 MISSION OUTGOING AGRICULTURE INVESTMENT SEMINARIN AGUA-NOR, TRONDHEI TRONDHEIM		0887
Sector: 006 ELECTRONICS EQUIP. & SERV		
010 FAIRS INFO BOOTH AT NOR-COM, OSLO, NORWAY	OSLO	0587
020 MISSION OUTGOING TECHNOLOGY TRANSFER MISSION TONORWAY	OSLO	0987
024 MISSION INCOMING INVESTMENT MISSION FROM NORWAY		0987
OFFSHORE TECHNOLOGY MISSION FROM NORWAY	HALIFAX	0987
TELECOMMUNICATIONS MISSION FROM NORWAY		0388
OFFICE AUTOMATION MISSION FROM NORWAY (EQUIPMENT & S TORONTO		0288
Sector: 008 TRANSPORT SYS, EQUIP, COMP, SERV.		
020 MISSION OUTGOING OCEAN INDUSTRIES MISSION TO NORWAY	OSLO	0587
Sector: 013 CONSUMER PRODUCTS		
020 MISSION OUTGOING CANADIAN ARTS, CRAFTS AND GIFTWARE MISSION TO	OSLO	0288
024 MISSION INCOMING FUR BUYERS FROM NORWAY TO MONTREAL	MONTREAL	0587
FUR BUYERS FROM NORWAY TO TORONTO	TORONTO	0288
SPORTING GOODS BUYERS FROM NORWAY TO MONTREAL	MONTREAL	0188
Sector: 016 INDUSTRIAL MACHIN, PLANTS, SERV.		
024 MISSION INCOMING HARDWARE BUYERS FROM NORWAY TO CDN HARDWARE SHOW, TO TORONTO		0288
Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 433 OSLO		
Sector: 001 AGRI & FOOD PRODUCTS & SERVICE		
010 FAIRS INNATL HOTEL, RESTAURANT, INSTITUTIONAL & CATERING	OSLO	1188

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 433 OSLO		
Sector: 001 AGRI & FOOD PRODUCTS & SERVICE		
020 MISSION OUTGOING PROCESSED FOOD MISSION	OSLO/BERGEN	0389
Sector: 002 FISHERIES, SEA PRODUCTS & SERV.		
010 FAIRS AGUANOR '89 NORFISHING '88	TRONDHEIM TRONDHEIM	0889 0888
Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV		
024 MISSION INCOMING DEFENCE PRODUCTS AND INVESTMENT		0390
Sector: 005 COMM. & INFORM. EGP. & SERV		
010 FAIRS TELEMATIC '88 NORCOM(INT'L TELECOM. EXH. AND CENFERENCE	OSLO OSLO	1088 0688
020 MISSION OUTGOING SOFTWARE	OSLO/STAVANGER	1089
024 MISSION INCOMING SOFTWARE BUYERS MISSION TO ATTEND MIM	MONTREAL	0588
Sector: 006 ELECTRONICS EQUIP. & SERV		
010 FAIRS KONTOR '88	OSLO	0988
Sector: 009 FOREST PRODUCTS, EQUIP, SERVICES		
024 MISSION INCOMING FURNITURE	TORONTO	1089
Sector: 011 OIL & GAS EQUIPMENT, SERVICES		
010 FAIRS OFFSHORE NORTHERN SEAS (ONS 88)	STAVANGER	0888
020 MISSION OUTGOING ONSHORE OIL MISSION	SPITZBERGEN(SVALBARD	0389
Sector: 013 CONSUMER PRODUCTS		
020 MISSION OUTGOING FUR MFRS SALES MISSION	OSLO	0488

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 433 OSLO		
Sector: 013 CONSUMER PRODUCTS		
024 MISSION INCOMING		
CDN FUR FASHION SHOW	MONTREAL	0588
FURSKIN BUYERS (HUDSON BAY FUR AUCTION)	TORONTO	0289
SPORTING GOODS BUYERS MISSION	MONTREAL	0189
Sector: 015 CONSTRUCTION INDUSTRY		
020 MISSION OUTGOING		
DO-IT-YOURSELF '89	OSLO	0889
024 MISSION INCOMING		
HARDWARE BUYERS	TORONTO	0289

Export and Investment Promotion Planning System

87/88 Trade and Economic Overview

Mission: 435 COPENHAGEN

Country: 093 DENMARK

THE DANISH ECONOMY EARNS 29% OF ITS GDP FROM EXPORTS. THE ECONOMY IS A SOPHISTICATED INT'L & SRVCE ECONOMY PROVIDING A HIGH STANDARD OF LIVING. DENMARK'S MAJOR TRADING PARTNERS ARE W. GERMANY, THE U.K. & SWEDEN, ACCOUNTING FOR OVER 40% OF TRADE. DANISH EXPORTS ARE APPROX. 70% MFTD GOODS & 20% AGRI'L PRODS, WHILE ITS IMPORTS ARE PRIMARILY RAW & SEMI-PROCESSED COMMODITIES. THE DANISH ECONOMY HAS ENJOYED A SIGNIFICANT REAL GROWTH IN THE PAST 4 YEARS WITH AN AVERAGE OF 3% ANNUAL INCREASE IN GDP. THIS GROWTH AGGRAVATED A PERSISTENT BALANCE OF PAYMENTS DEFICIT NOW EXPECTED TO REACH 5% OF GDP FOR 86. A NEGATIVE MERCHANDISE TRADE BALANCE HAS LARGELY CONTRIBUTED TO THE DEFICIT WITH THE INCREASE IN CONSUMER GDP RESULTING IN INCREASED IMPORTS WHILE EXPORT GROWTH STAGNATED. ALTHOUGH THIS PROBLEM CLD HAVE BEEN ADDRESSED BY A DEVALUATION OF THE KRONER THE GOVT BELIEVED THIS CLD LEAD TO HIGHER INFLATION & INTEREST RATES & INSTEAD CHOSE TO INSTITUTE RESTRICTIVE FISCAL POLICIES WHICH INCLUDE TAXATION OF CONSUMER CREDIT. THESE MEASURES COUPLED WITH OTHER DAMPENING POLICIES AFFECTING THE CONSTRUCTION & PUBLIC SECTORS ARE EXPECTED TO SLOW DOMESTIC DEMAND & LEAD TO A DECREASE IN IMPORTS. THE GOVT HAS ALSO PRESENTED A BUDGETARY SURPLUS IN KEEPING WITH ITS AUSTERITY PROGRAM. CDA'S EXPORTS TO DENMARK ARE PRIMARILY IN THE RAW AND SEMI-PROCESSED COMMODITY AREAS. 1985 EXPORTS REACHED \$82M. MAIN PRODS HAVE BEEN COAL, ANIMAL, FISH & SEA PRODS, PLYWOOD & ASBESTOS. COMPUTER & PARTS, ELECTRONICS & OTHER HIGH TECH PRODS REPRESENT ANOTHER IMPORTANT COMPONENT OF CDN EXPORTS TO DENMARK ACCOUNTING FOR 11% OF '85 EXPORTS GROWING FM 9% IN '84. DANISH EXPORTS TO CDA ARE SPREAD THROUGH MANY PRODUCT AREAS WITH SOME CONCENTRATION IN FOODSTUFFS, FURNITURE, MEDICAL PRODS & SPECIALIZED MACHINERY & INSTRUMENTS. DANISH EXPORTS HAVE GROWN TO \$229 MILLION IN '85 RESULTING IN A SUBSTANTIAL BILATERAL TRADE IMBALANCE. WHILE CDN STATISTICS UNDERCOUNT CDN EXPORTS TO DENMARK BY AN ESTIMATED 30% DUE TO THE ENTREPOT PROBLEM IT IS STILL CLEAR THAT CDN EXPORTS HAVE NOT BEEN INCREASING THEIR SHARE OF DANISH IMPORTS. THE LOWER CDN DOLLAR EXCHANGE RATE SHLD HELP TO OPEN PROSPECTS FOR INCREASED SALES THIS YEAR. DANISH TRADE IN GENERAL IS LIKELY TO RESPOND TO A LIMITED DEGREE TO ITS GOVTS POLICY OF DAMPENING IMPORTS & INCREASING EXPORTS. HOWEVER MOST ANALYSTS EXPECT ONLY A MARGINAL IMPROVEMENT IN THE CURRENT ACCOUNT TO A DEFICIT OF AROUND \$2.5B OR 5% OF GNP FOR '86. PROSPECTS FOR '87 ARE BETTER AS INCREASED DEMAND BY TRADING PARTNERS SUCH AS W. GERMANY SHLD STIMULATE GREATER MFTD EXPORTS. AN IMPROVED BALANCE OF PAYMENTS POSITION IS EXPECTED AND A DEFICIT OF \$2 BILLION.

Export and Investment Promotion Planning System

REPT: SYN-GEO 87/88 A. Post export program priorities

Region: WESTERN EUROPE

Mission: 435 COPENHAGEN

Market: 093 DENMARK

The Mission selected the following sectors as priority areas for export promotion activities for the coming fiscal year:

1. 005 COMM. & INFORM. EQP. & SERV

REASONS: DENMARK HAS HIGHEST COMPUTER PROCESSING CAPACITY PER CAPITA IN EUROPE. MKT FOR ALL TYPES OF SOFTWARE AND SOME HARDWARE IS GROWING QUICKLY. DENMARK IS IDEAL TEST MARKET FOR EUROPE.

2. 004 DEFENCE PROGRAMS, PRODUCTS, SERV

REASONS: DEFENCE PRODUCT SALES HAVE GONE FM \$2M TO \$15M IN PAST THREE YEARS. RELATIONSHIP WITH DANISH MILITARY IS STILL IN EARLY DVLPMT AND MUST BE PRIORITY FOR PROMOTION EFFORTS TO CONSOLIDATE & BUILD ON THIS MARKET

3. 006 ELECTRONICS EQUIP. & SERV

REASONS: SCIENTIFIC ELECTRONIC EQPT IS HIGH GROWTH MKT & CDN PRODUCTS ARE COMPETITIVE. CDN MEASURING INSTRUMENTATION IS WELL ACCEPTED BY MKT WHEN IT FINDS MATCH WITHIN DENMARK'S "NICHE" ORIENTED INDUSTRY.

4. 001 AGRI & FOOD PRODUCTS & SERVICE

REASONS: THIS SECTOR ACCOUNTS FOR MAJOR PORTION OF OUR RESPONSIVE WORKLOAD BOTH ENQUIRIES FROM CANADA AND FROM DENMARK.

The most important current Canadian export sectors to this market are (based on actual export sales):

1. 010 MINE, METAL, MINERAL PROD & SRV
2. 001 AGRI & FOOD PRODUCTS & SERVICE
3. 009 FOREST PRODUCTS, EQUIP, SERVICES
4. 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 435 COPENHAGEN

Market: 093 DENMARK

Sector: 001 AGRI & FOOD PRODUCTS & SERVICE

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	3200.00M	\$ 3300.00M	\$ 3190.00M	\$ 3440.00M
Canadian Exports \$	16.00M	\$ 15.00M	\$ 12.00M	\$ 9.00M
Canadian Share of Import Market	0.50%	0.50%	0.40%	0.30%

Major Competing Countries

Market Share

i) 128 GERMANY WEST	017 %
ii) 354 NETHERLANDS	012 %
iii) 237 ITALY	005 %
iv) 499 SPAIN	004 %
v) 577 UNITED STATES OF AMERICA	004 %

Cumulative 3 year export potential for CDN products
in this Sector/Subsector: 30-60 \$M

Current status of Canadian exports:

Products/services for which there are
good market prospects

Current Total Imports

i) MOSSES	In Canadian \$	\$ 8.00 M
ii) MAPLE SUGAR		\$ 1.50 M

The Trade Office reports that the following factors influence Canadian
export performance in this market for this sector (sub-sector).

- there are import restrictions which can present significant problems
- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector
(sub-sector) in this market is lower than optimum mainly because of:

- the unsuitability of Canadian products for this market
- non-tariff protectionist measures which are difficult to overcome
- other factor(s) described by the Trade Office as follows:

AS A MEMBER OF THE EC DANISH AGRICULTURAL POLICY MUST CONFIRM TO
THE C. A. P. THIS INTRODUCES A VARIETY OF NTB'S. IN ADDITION MANY
CDN AGRICULTURAL PRODUCTS DO NOT CONFORM TO LOCAL QUALITY
STANDARDS/TASTE.

Export and Investment Promotion Planning System

MISSION: 435 COPENHAGEN

COUNTRY: 093 DENMARK

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade missions
- Canada's position as one of the few major sources of international supply

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: THIS SECTOR REPRESENTS THE MAJOR PORTION OF OUR RESPONSIVE WORKLOAD WITH OVER 90 REQUESTS FOR ASSISTANCE RECEIVED EACH QUARTER. GIVEN THE OFTEN LIMITED MARKET PROSPECTS WE ARE DEVELOPING STANDARD MARKET INFO SHEETS TO ASSIST FIRMS IN DEFINING WHETHER THEY

Results Expected: WE PLAN TO MINIMIZE TIME REQUIRED TO RESPOND TO REQUESTS FREEING MORE TIME TO WORK ON TECHNOLOGY INFLOW PROGRAM.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: THE TECHNOLOGY INFLOW POTENTIAL OF THIS SECTOR IS HIGH. POST HAS IDENTIFIED FIRMS WITH SUITABLE TECH FOR CDN INDUSTRY & WILL START PROGRAM OF DETAILED FOLLOW UP INCLUDING ATTENDANCE AT MAJOR TRADE SHOWS ANUGA/SIAL/IFE.

Results Expected: 6 - 8 NEW LICENSING AGREEMENTS FOR THE YEAR.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 435 COPENHAGEN

Market: 093 DENMARK

Sector: 002 FISHERIES, SEA PRODUCTS & SERV.

Subsector: 021 FISH & SHELLFISH & OTHER PROD

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	445.00M	\$ 445.00M	\$ 440.00M	\$ 365.00M
Canadian Exports \$	12.00M	\$ 10.00M	\$ 8.00M	\$ 4.50M
Canadian Share of Import Market	2.70%	2.30%	1.80%	1.40%

Major Competing Countries

Market Share

i) 507 SWEDEN	015 %
ii) 410 NORWAY	011 %
iii) 354 NETHERLANDS	006 %
iv) 128 GERMANY WEST	005 %

Cumulative 3 year export potential for CDN products
in this Sector/Subsector: 30-60 \$M

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) PACIFIC SALMON	\$ 89.00 M
ii) COD	\$ 40.00 M
iii) ROE (LUMPFISH)	\$ 4.00 M
iv) LOBSTER FROZEN/LIVE	\$ 3.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- other factor(s) described by the Trade Office as follows:

THIS SECTOR IS HIGHLY INFLUENCED BY A) LOCAL SUPPLY, B) WORLD MARKET
C) \$ LEVEL CANADA SHOULD CONSIDER MORE SOPHISTICATED MARKETING
THIS SECTOR.

Export and Investment Promotion Planning System

MISSION: 435 COPENHAGEN

COUNTRY: 093 DENMARK

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade fairs
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: FOLLOW UP TO FOOD PACIFIC INITIATIVE. DANISH BUYERS WE TOOK TO THIS EVENT ARE DEMONSTRATING INCREASED INTEREST IN CDN SOURCING WE WILL FOLLOW PROGRESS OF THEIR INITIAL ORDERS TO ENSURE THAT IF THERE ARE PROBLEMS THEY ARE RESOLVED AS QUICKLY AS POSSIBLE.

Results Expected: IF INITIAL ORDERS OF \$.3 MILLION PROVE SATISFACTORY THESE BUYERS REPRESENT AN ANNUAL SALES POTENTIAL OF \$ 3 MILLION.

Activity: THERE IS A SUBSTANTIAL RESPONSIVE WORKLOAD WHICH WE WILL CONTINUE TO SERVICE.

Results Expected: AN AVERAGE OF 60 REQUESTS FOR ASSISTANCE ARE RECEIVED EACH QUARTERS.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: CANADIAN EEL HAS HAD LIMITED SUCCESS IN DANISH MARKET LARGELY DUE TO PACKAGING/CLASSIFICATION INADEQUACIES. WE WILL BE WORKING WITH DANISH EEL EXPERT TO ORGANIZE TRAINING PROGRAM FOR EASTERN CDN FISHERIES.

Results Expected: INCREASED QUALITY LEVELS FOR CANADIAN EEL.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 435 COPENHAGEN

Market: 093 DENMARK

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Subsector: 042 ARMAMENTS & VEHICLES

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	0.00M NA	\$ 0.00M NA	\$ 0.00M NA	\$ 0.00M NA
Canadian Exports \$	20.00M	\$ 15.00M	\$ 7.00M	\$ 2.00M
Canadian Share of Import Market	0.00% NA	0.00% NA	0.00% NA	0.00% NA

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	000 %
ii) 128 GERMANY WEST	000 %
iii) 051 UNITED KINGDOM	000 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 30-60 \$M

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects

Current Total Imports

In Canadian \$

i) AUTOMOTIVE RETROFIT
ii) AMMUNITION

\$ 0.00 M

\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- exports of certain products or services to this country are subject to Canadian export controls
- the degree of import duty protection of local industry tends to be low
- approval of technical standards can present problems in the case of some imported products

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- No factors reported by mission

Export and Investment Promotion Planning System

MISSION: 435 COPENHAGEN

COUNTRY: 093 DENMARK

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: NEW PROGRAM MANAGER RESPONSIBLE FOR SECTOR IN PROCESS OF ESTABLISHING CONTACT WITH KEY DECISION MAKERS.

Results Expected: INTRODUCTORY CALLS TO BE COMPLETED 12/86
FURTHER CALLS AND SOME OF HOSPITALITY EVENTS
WILL CONSOLIDATE CONTACTS.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: THIS SECTOR IS FOCUS OF MAJOR ONGOING PROMOTION EFFORTS. WE WILL UNDERTAKE PROGRAM OF REGULAR CALLS ON KEY DECISION MAKERS AND WHEN APPR. SUPPLEMENT THESE WITH CALL AT POLITICAL LEVEL.

Results Expected: INCREASED SALES OF \$ 5 M.

Activity: OFFSET ISSUE CONTINUES TO THREATEN FUTURE SALES EXPANSION. WE WILL WORK WITH DANISH OFFICIALS TO TRY TO MINIMIZE IMPACT.

Results Expected: CONTINUED SALES POSSIBILITIES.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 435 COPENHAGEN

Market: 093 DENMARK

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Subsector: 044 OTHER DEFENSE PROD & SERV.

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size (import) \$	0.00M NA	\$ 0.00M NA	\$ 0.00M NA	\$ 0.00M NA
Canadian Exports \$	3.00M	\$ 1.50M	\$ 1.00M	\$ 1.00M
Canadian Share of Import Market	0.00% NA	0.00% NA	0.00% NA	0.00% NA

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	000 %
ii) 128 GERMANY WEST	000 %
iii) 051 UNITED KINGDOM	000 %

Cumulative 3 year export potential for CDN products
in this Sector/Subsector: 5-15 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are
good market prospects

Current Total Imports In Canadian \$
i) NBC EQUIPMENT \$ 0.00 M
ii) OTHER PROTECTIVE CLOTHING \$ 0.00 M

The Trade Office reports that the following factors influence Canadian
export performance in this market for this sector (sub-sector).

- exports of certain products or services to this country are subject to Canadian export controls
- the degree of import duty protection of local industry tends to be low
- approval of technical standards can present problems in the case of some imported products

In the Trade Office's opinion, Canadian export performance in this sector
(sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- the apparent limited sectoral capability in Canada compared to other competing export countries

Export and Investment Promotion Planning System

MISSION: 435 COPENHAGEN

COUNTRY: 093 DENMARK

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- use of Canadian Government export promotion activities

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: NEW PROGRAM MANAGER RESPONSIBLE FOR SECTOR IN PROCESS OF ESTABLISHING CONTACT WITH KEY DECISION MAKERS.

Results Expected: INTRODUCTORY CALLS TO BE COMPLETED 12/86
FURTHER CALLS AND SOME OF HOSPITALITY EVENTS
WILL CONSOLIDATE CONTACTS.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: THIS SECTOR IS FOCUS OF MAJOR ONGOING PROMOTION EFFORTS. WE WILL UNDERTAKE PROGRAM OF REGULAR CALLS ON KEY DECISION MAKERS AND WHEN APPROPRIATE SUPPLEMENT THESE WITH CALL AT POLITICAL LEVEL.

Results Expected: INCREASED SALES OF \$ 2M.

Activity: OFFSET ISSUE CONTINUES TO THREATEN FUTURE SALES EXPANSION. WE WILL WORK WITH DANISH OFFICIALS TO TRY TO MINIMIZE IMPACT.

Results Expected: CONTINUED SALES POSSIBILITIES.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 435 COPENHAGEN

Market: 093 DENMARK

Sector: 005 COMM. & INFORM. EQP. & SERV

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	2000.00M	\$ 1800.00M	\$ 1700.00M	\$ 1500.00M
Canadian Exports \$	23.00M	\$ 18.00M	\$ 16.00M	\$ 15.00M
Canadian Share of Import Market	1.15%	1.00%	1.00%	1.00%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	040 %
ii) 128 GERMANY WEST	020 %
iii) 265 JAPAN	015 %
iv) 051 UNITED KINGDOM	010 %
v) 507 SWEDEN	008 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 30-60 \$M

Current status of Canadian exports:

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) TELEPHONE RELATED PRODUCTS	\$ 300.00 M
ii) DATA COMMUNICATION	\$ 250.00 M
iii) SOFTWARE/COMPUTER EQUIP.	\$ 700.00 M
iv) CAD/CAM - IMAGING	\$ 70.00 M

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

i) Project Name: DANISH TEL. COS. TAKING OVER X.25 NETWORK
FM 1.1.86 INCREASED X.25 MARKETING DROP
Approximate Value: \$ 100 M
Financing Source: 012 DOM
For further info. please contact:
EMBASSY

Export and Investment Promotion Planning System

MISSION: 435 COPENHAGEN

COUNTRY: 093 DENMARK

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- exports of certain products or services to this country are subject to Canadian export controls
- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters
- other factor(s) described by the Trade Office as follows:

MANY COMPANIES HAVE LIMITED RESOURCES FOR TECHNICAL/MARKETING SUPPORT FOR THEIR EUROPEAN DISTRIBUTORS. COMPETITORS TEND TO VISIT DENMARK MORE FREQUENTLY AND PROVIDE HIGHER DEGREE OF AFTER SALES MARKETING/TECHNICAL SUPPORT COMPARED TO CANADIAN EXPORTERS.

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- strong sectoral capability in Canada

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: INTRODUCING NEW CDN COMPANIES APPROX. 20 PER QUARTER. CONTACT/CALL ON SELECTED DANISH COMPANIES/TELEPHONE COMPANIES RE CANADIAN X.25 EQUIPMENT SUPPLY CAPABILITIES (SEE 7.9)(ALSO PROPOSE MISSION).

Results Expected: 4 NEW BUYING CONNECTIONS PER QUARTERS.

Activity: PROGRAM TO INCREASE AWARENESS OF CDN SUPPLY CAPABILITY USING DIRECT MAIL, ATTENDANCE AT TRADE SHOWS, SELECTED COMPANY CALLS.

Results Expected: DANISH REQUEST FOR OUR ASSISTANCE IN SOURCING TO INCREASE 15%.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 435 COPENHAGEN

Market: 093 DENMARK

Sector: 006 ELECTRONICS EQUIP. & SERV

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1.80M	\$ 1.50M	\$ 1.20M	\$ 1.10M
Canadian Exports \$	16.00M	\$ 12.00M	\$ 10.00M	\$ 8.00M
Canadian Share of Import Market	0.90%	0.80%	0.80%	0.70%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	030 %
ii) 128 GERMANY WEST	025 %
iii) 265 JAPAN	025 %
iv) 051 UNITED KINGDOM	008 %

Cumulative 3 year export potential for CDN products
in this Sector/Subsector: 30-60 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) INSTRUMENTATION	\$ 800.00 M
ii) COMPONENTS	\$ 400.00 M
iii) PROCESS CONTROL	\$ 200.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- exports of certain products or services to this country are subject to Canadian export controls
- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non competitive pricing
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters
- other factor(s) described by the Trade Office as follows:

MANY COMPANIES HAVE LIMITED RESOURCES FOR TECHNICAL/MARKETING SUPPORT FOR THEIR EUROPEAN DISTRIBUTORS. COMPETITORS TEND TO VISIT

Export and Investment Promotion Planning System

MISSION: 435 COPENHAGEN

COUNTRY: 093 DENMARK

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- strong sectoral capability in Canada

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: INTRODUCE APPROX. 10 CANADIAN COMPANIES TO MARKET PER QUARTER.

Results Expected: 2 - 3 NEW BUSINESS CONNECTIONS PER QUARTER.

Activity: IMPROVE GENERAL AWARENESS OF CANADIAN ELECTRONICS SUPPLY CAPABILITY VIA DIRECT MAILING, TRADE SHOW ATTENDANCE, PERSONAL CALLS.

Results Expected: 2 - 3 NEW BUSINESS CONNECTIONS PER QUARTER.

Activity: UPDATE INVENTORY OF TRADE CONTACTS TO REFLECT NEW INTERESTS/TRENDS.

Results Expected:

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 435 COPENHAGEN

Market: 093 DENMARK

Sector: 009 FOREST PRODUCTS, EQUIP, SERVICES

Subsector: 092 WOOD AND WOOD PRODUCTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	700.00M	\$ 700.00M	\$ 650.00M	\$ 634.00M
Canadian Exports \$	10.00M	\$ 8.00M	\$ 11.00M	\$ 10.60M
Canadian Share of Import Market	1.40%	1.10%	1.70%	1.70%

Major Competing Countries

Market Share

i) 507 SWEDEN	043 %
ii) 504 FINLAND	016 %
iii) 128 GERMANY WEST	014 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 30-60 \$M

Current status of Canadian exports: Mature with little growth

Products/services for which there are good market prospects

Current Total Imports

i) PLYWOOD	\$ 78.00 M
ii) WOOD PULP	\$ 36.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- there are import restrictions which can present significant problems
- the degree of import duty protection of local industry tends to be low
- approval of technical standards can present problems in the case of some imported products

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- other factor(s) described by the Trade Office as follows:

CDN EXPORTERS REGARD DENMARK AS A LOW PRIORITY MARKET. THEIR INTEREST VARIES ACCORDING TO CONDITIONS IN THE US. SUSTAINED MARKETING WOULD PRODUCE MORE RESULTS.

Export and Investment Promotion Planning System

MISSION: 435 COPENHAGEN

COUNTRY: 093 DENMARK

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: TO INCREASE MAJOR BUYERS' AWARENESS OF CANADIAN SOURCES WE ARE WORKING WITH DANISH FIRMS TO ARRANGE TRAINING PROGRAMS IN CANADA FOR YOUNG DANISH BUYERS.

Results Expected: 1 - 2 BUYERS TO GO ON TRAINING PROGRAM WITH MAJOR CANADIAN FIRMS.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 435 COPENHAGEN

Market: 093 DENMARK

Sector: 010 MINE, METAL, MINERAL PROD & SRV

Subsector: 102 MINERALS AND MINERAL PRODUCTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	550.00M	\$ 550.00M	\$ 820.00M	\$ 578.00M
Canadian Exports \$	19.00M	\$ 18.00M	\$ 17.50M	\$ 18.00M
Canadian Share of Import Market	3.00%	3.00%	2.00%	3.00%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	020 %
ii) 011 AUSTRALIA	017 %
iii) 051 UNITED KINGDOM	013 %
iv) 288 SOUTH AFRICA	025 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 30-60 \$M

Current status of Canadian exports:

Products/services for which there are good market prospects

Current Total Imports

i) TYERMAL COAL

In Canadian \$
\$ 550.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- other factor(s) described by the Trade Office as follows:

DENMARK CHOOSES FOR POLITICAL REASONS TO SPREAD ITS COAL PURCHASES OVER MANY MINES AND MANY COUNTRIES OF SUPPLY. ADDITIONAL OPPORTUNITY SHOULD ARISE FOLLOWING DECISION TO BOYCOTT SOUTH AFRICA.

Export and Investment Promotion Planning System

MISSION: 435 COPENHAGEN

COUNTRY: 093 DENMARK

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- Canada's position as one of the few major sources of international supply

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: THERE ARE TWO MAJOR UTILITIES PURCHASING COAL. ONE BUYS FROM CDA, THE OTHER DOES NOT. POST WILL INVESTIGATE WHY AND IF THEY CAN BE INTERESTED IN CANADIAN SOURCES.

Results Expected: INCREASED INTEREST IN CANADIAN SOURCES FOR COAL.

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 435 COPENHAGEN		
Sector: 005 COMM. & INFORM. EGP. & SERV		
010 FAIRS		
MINI-SOLO CANADIAN DATA-COMMUNICATION PRODUCTS	COPENHAGEN	0488
KONTOR & DATA 88	COPENHAGEN	1088
MIKRODATA 89	COPENHAGEN	0389
024 MISSION INCOMING		
TRADE JOURNALISTS TOUR		0588
Sector: 010 MINE, METAL, MINERAL PROD & SRV		
024 MISSION INCOMING		
COAL BUYERS		0588
Sector: 999 MULTIPLE SECTORS		
010 FAIRS		
HI 89	HERNING	0989
INDUSTRIKONTAKT 88	COPENHAGEN	1188

Export and Investment Promotion Planning System

87/88 Trade and Economic Overview

Mission: 436 DUBLIN

Country: 224 IRELAND

DECLINING OIL PRICES, FALLING INT'L INTEREST RATES, THE DEPRECIATION OF STERLING & THE US DOLLAR LED TO FORECASTS OF A BRIGHTER ECONOMIC OUTLOOK FOR IRELAND IN '86. HOWEVER, MOST FORECASTS OF ECONOMIC GROWTH HAD TO BE REVISED DOWNWARDS. DOMESTIC CONSUMER SPENDING WAS NOT AS BUOYANT AS EXPECTED, ADVERSE WEATHER CONDITIONS REDUCED AGRICULTURAL OUTPUT & FEWER US VISITORS AFFECTED TOURISM. - BESIDES THESE CURRENT FACTORS, PROBLEMS OF UNEMPLOYMENT & PUBLIC FINANCE CONTINUE AS THE TWO MAJOR PROBLEMS OF THE IRISH ECONOMY & ARE EXPECTED TO REMAIN SO FOR THE REST OF THE DECADE. - INTERNALLY, THE MAIN CONSTRAINT TO GROWTH IS THE EXCHEQUER FINANCES. CURRENT BUDGET DEFICIT IS PROJECTED TO BE IR&180M OVER TARGET (COMPARED TO IR&549M FRO '85) DESPITE AN INCREASE IN THE BURDEN OF TAXATION & A DECREASE IN DEBT SERVICE EXPENDITURE. THE EXCHANGE RATE POLICY REMAINS UNCERTAIN. THE STRONG EXCHANGE RATE STANCE ADOPTED AT THE APRIL EMS REALIGNMENT WAS PARTLY REVERSED UNILATERALLY IN THE AUG. DEVALUATION OF THE IR. POUND BY 8%. THE IR. POUND APPRECIATED AGAINST STERLING FROM 82.7 IN NOV. TO 95.0 IN AUG., & THE DEVALUATION WAS DESIGNED TO COUNTERACT A NEGATIVE IMPACT ON IRISH EXPORTS. THE DECREASE IN COST RESULTING FROM THE IR. POUND APPRECIATION WAS NOT PASSED ON TOTALLY OR IMMEDIATELY TO THE CONSUMER, RESULTING IN INFLATION IN '86 BEING HIGHER THAN FORECAST. THE CURRENT 3% INFLATION RATE IS EXPECTED TO RISE TO 4% IN '87. THE GOVERNMENT ANNOUNCED GUIDELINES ADVOCATING PAY INCREASES BELOW INFLATION LEVELS. TRADE BALANCE SURPLUS OF IR&631M JAN-AUG '86 (COMPARED TO IR&307M '85) WAS DUE TO FALLING IMPORT PRICES MAINLY OIL, & DECLINE IN VOLUME OF IMPORTS (TOTAL '85 TRADE: IMPORTS IR&9437M, EXPORTS IR&9744M). - INTEREST RATES WHICH FELL BELOW 10% IN JUNE STARTED TO CLIMB AGAIN DUE TO THE UNCERTAINTY REGARDING THE EXCHANGE RATE POLICY, THE BUDGET OUTTURN & THE POLITICAL CLIMATE (ELECTION IS DUE IN NOV '87). EXCHEQUER FUNDING FROM DOMESTIC SOURCES HAS BEEN BELOW NORMAL & THE GOVERNMENT HAD TO RAISE SUBSTANTIAL SUMS ABROAD. - UNEMPLOYMENT WAS RECORDED AT 232,400 IN SEPT (17.9%) DESPITE THE CONTINUATION OF HIGH LEVEL EMIGRATION WHICH RE-EMERGED IN '84. PRIVATE SECTOR INVESTMENT INCREASED SINCE '84 BUT IT IS CONCENTRATED IN MACHINERY & EQUIP., NOT CONSTRUCTION (WHICH REMAINS A DEPRESSED SECTOR) THUS FIRMS BECOME MORE CAPITAL INTENSIVE BY UTILIZING MORE TECHNOLOGY BUT RESULTING IN NEGATIVE IMPACT ON EMPLOYMENT.

Export and Investment Promotion Planning System

REPT: SYN-GEO 87/88 A. Post export program priorities

Region: WESTERN EUROPE

Mission: 436 DUBLIN

Market: 224 IRELAND

The Mission selected the following sectors as priority areas for export promotion activities for the coming fiscal year:

1. 008 TRANSPORT SYS, EQUIP, COMP, SERV.

REASONS: GUINNESS PEAT AVIATION, AER LINGUS COMMUTER SERVICES & RYANAIR HAVE EXPRESSED INTEREST IN DEHAVILLAND DASH 7 AND 8 AIRCRAFT.

2. 015 CONSTRUCTION INDUSTRY

REASONS: IRISH GOVERNMENT HAS BEFORE IT A CDN PROPOSAL TO CONSTRUCT A \$200 MIL- LION + TRANSPORTATION CENTRE IN DOWNTOWN DUBLIN WHICH INCLUDES THE CONSTRUCTION OF A 3.5 KM SUBWAY.

3. 001 AGRI & FOOD PRODUCTS & SERVICE

REASONS: DUE TO IRISH GOVERNMENT POLICY OF IMPORT SUBSTITUTION IN FOOD SECTOR, WE ARE TRYING TO LINK CDN FOOD PROCESSORS (TECHNOLOGY) WITH IRISH INDUS- TRY. ESPECIALLY IN DAIRY, MEAT AND FISH PRODUCTS.

4. 005 COMM. & INFORM. EQP. & SERV

REASONS: CDN CAPABILITIES IN CABLE TELEVISION & REMOTE SENSING HAVE BEEN RECO- GNISED BY IRISH AUTHORITIES. TWO CDN MISSIONS TO IRELAND INDICATE CON- siderable future potential in this sector.

The most important current Canadian export sectors to this market are (based on actual export sales):

1. 005 COMM. & INFORM. EQP. & SERV
2. 006 ELECTRONICS EQUIP. & SERV
3. 003 GRAINS AND OILSEEDS
4. 009 FOREST PRODUCTS, EQUIP, SERVICES

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 436 DUBLIN

Market: 224 IRELAND

Sector: 001 AGRI & FOOD PRODUCTS & SERVICE

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	985.00M	\$ 970.00M	\$ 960.00M	\$ 915.00M
Canadian Exports \$	2.10M	\$ 2.00M	\$ 1.60M	\$ 1.70M
Canadian Share of Import Market	0.20%	0.20%	0.20%	0.20%

Major Competing Countries

Market Share

i) 224 IRELAND	070 %
ii) 051 UNITED KINGDOM	014 %
iii) 112 FRANCE	005 %
iv) 354 NETHERLANDS	003 %
v) 237 ITALY	002 %
vi) 128 GERMANY WEST	002 %

Cumulative 3 year export potential for CDN products
in this Sector/Subsector:

3-5 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are
good market prospectsCurrent Total Imports
In Canadian \$

i) JOINT VENTURES	\$ 0.00 M
ii) TOBACCO	\$ 1.00 M
iii) VEGETABLES	\$ 0.25 M
iv) APPLES	\$ 0.03 M
v) HAY	\$ 0.10 M
vi) HONEY	\$ 0.06 M
vii) CATTLE/SEMEN	\$ 0.03 M
viii) BEER	\$ 0.00 M
ix) WINE	\$ 0.00 M

Export and Investment Promotion Planning System

MISSION: 436 DUBLIN

COUNTRY: 224 IRELAND

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- there are import restrictions which can present significant problems
- the degree of import duty protection of local industry tends to be high
- approval of technical standards can present problems in the case of some imported products

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- non-tariff protectionist measures which are difficult to overcome
- other factor(s) described by the Trade Office as follows:

IRELAND'S STRICT ANIMAL AND PLANT HEALTH REGULATIONS. IRELAND'S SUCCESSFUL POLICY OF IMPORT SUBSTITUTION.

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of provincial governments export promotion activities

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: GENERATE GREATER CANADIAN INVOLVEMENT IN IRISH (AND EEC) MARKETS THROUGH JOINT VENTURES WITH IRISH PARTNERS.

Results Expected: SERIOUS INTEREST IN THIS CONCEPT ON THE PART OF IRISH INDUSTRY AND AUTHORITIES. EASIER ACCESS TO IRISH & EEC MARKETS.

Activity: FOLLOW-UP RE POSSIBILITIES OF CO-OPERATION BETWEEN IRISH AND CANADIAN BREWERS

Results Expected: HIGHLY COMPETITIVE MARKET. INITIAL CONTACT.

Activity: DISCUSS CANADIAN SOURCING OPTIONS WITH FRUIT IMPORTERS OF IRELAND LTD (FII).

Results Expected: INCREASING INTEREST ON PART OF FII IN NEW SOURCES.

Export and Investment Promotion Planning System

MISSION: 436 DUBLIN

COUNTRY: 224 IRELAND

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: DEVELOP MARKET FOR CANADIAN WINE.

Results Expected: SAMPLES EN ROUTE TO LOCAL WINE IMPORTER/
RETAILER.

Activity: FOLLOW UP MEETINGS WITH KERRY CO-OP CONCERNING TRANSFER OF
TECHNOLOGY IN FOOD SECTOR. KERRY CO-OP ALSO INTERESTED IN
INVESTMENT POSSIBILITIES IN CANADA.

Results Expected: CANADIAN CONSULTANT TO MAKE RECOMMENDATIONS
TO KERRY CO-OP. POSSIBLE VISIT TO CANADA.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 436 DUBLIN

Market: 224 IRELAND

Sector: 002 FISHERIES, SEA PRODUCTS & SERV.

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	40.00M	\$ 40.00M	\$ 37.00M	\$ 33.00M
Canadian Exports \$	1.50M	\$ 1.70M	\$ 1.00M	\$ 1.30M
Canadian Share of Import Market	3.70%	4.30%	2.70%	4.00%

Major Competing Countries

Market Share

i) 224 IRELAND	065 %
ii) 051 UNITED KINGDOM	025 %
iii) 577 UNITED STATES OF AMERICA	003 %
iv) 093 DENMARK	001 %
v) 354 NETHERLANDS	001 %

Cumulative 3 year export potential for CDN products
in this Sector/Subsector: 1-3 \$M

Current status of Canadian exports: Well established and growing

Products/services for which there are
good market prospects

Current Total Imports

In Canadian \$

i) SALMON CANNED	\$ 1.50 M
ii) SALMON FROZEN	\$ 0.10 M
iii) JOINT VENTURES/FISH PROCESSING/FISH FARMING	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian
export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be moderate

In the Trade Office's opinion, Canadian export performance in this sector
(sub-sector) in this market is lower than optimum mainly because of:

- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters

Export and Investment Promotion Planning System

MISSION: 436 DUBLIN

COUNTRY: 224 IRELAND

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- participation in trade fairs
- use of provincial governments export promotion activities
- strong sectoral capability in Canada

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: ASSESS THE POSSIBILITY OF CDN FISH PROCESSORS LINKING UP WITH IRISH PROCESSORS THROUGH JOINT VENTURES ETC. IRELAND'S TOTAL ALLOWABLE CATCH (EEC) IS CONSTRAINT TO GROWTH. ASSESS POSSIBILITY OF IMPORTING CDN (QUOTA) FISH FOR PROCESSING.

Results Expected: DISTINCT POTENTIAL IF RIGHT 'CANDIDATES' CAN BE LOCATED IN CANADA AND IRELAND.

Activity: CO-OPERATION AND TECHNOLOGY TRANSFER IN FISH FARMING.

Results Expected: IRELAND'S AQUACULTURE INDUSTRY IS GROWING RAPIDLY- SALMON, MUSSELS, OYSTERS.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 436 DUBLIN

Market: 224 IRELAND

Sector: 005 COMM. & INFORM. EQP. & SERV

Subsector: 051 REMOTE SENSING

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	0.00M NA	\$ 0.00M NA	\$ 0.00M NA	\$ 0.00M NA
Canadian Exports \$	1.00M	\$ 0.00M	\$ 0.00M	\$ 0.00M
Canadian Share of Import Market	0.00% NA	0.00%	0.00%	0.00%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA

000 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 1-3 \$M.

Current status of Canadian exports: No Export results to date

Products/services for which there are
good market prospects

i) COMPUTERIZATION PROJECT

Current Total Imports
In Canadian \$
\$ 0.00 M

The Trade Office reports that the following factors influence Canadian
export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector
(sub-sector) in this market is lower than optimum mainly because of:

- other factor(s) described by the Trade Office as follows:
UNCERTAINTY AS TO WHETHER IRISH AUTHORITIES WILL HAVE THE FINANCE
TO UNDERTAKE PROJECT.

Some Canadian exporters to this market in this sector(sub-sector)
have enjoyed success previously as a result of a variety of
factors which the trade office reports to include:

- use of provincial governments export promotion activities
- Canada's position as one of the few major sources of international
supply
- strong sectoral capability in Canada

Export and Investment Promotion Planning System

MISSION: 436 DUBLIN

COUNTRY: 224 IRELAND

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: FOLLOWING FEASIBILITY STUDY ON COMPUTERIZATION OF IRELAND'S NATURAL RESOURCES. CANADIAN GROUP WILL SUBMIT THEIR FINDINGS TO NATIONAL BOARD FOR SCIENCE AND TECHNOLOGY.

Results Expected: CONSULTANCY CONTRACT WILL DEPEND ON AVAILABILITY OF IRISH FUNDING

Activity: MAINTAIN CONTACT WITH NATIONAL BOARD FOR SCIENCE & TECHNOLOGY RE LIKELY OUTCOME.

Results Expected: CONSULTANCY CONTRACT WILL DEPEND ON AVAILABILITY OF IRISH FUNDING.

Activity: FOLLOW UP ON POSSIBLE IRISH-CANADIAN CO-OPERATION ON EUREKA PROJECT.

Results Expected: INVOLVEMENT OF CANADIAN SUBSIDIARIES IN IRELAND IS REALISTIC.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 436 DUBLIN

Market: 224 IRELAND

Sector: 005 COMM. & INFORM. EQP. & SERV

Subsector: 055 BROADCASTING (INC CATV)

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	7.00M	\$ 5.00M	\$ 5.00M	\$ 6.00M
Canadian Exports \$	0.50M	\$ 0.20M	\$ 0.10M	\$ 0.10M
Canadian Share of Import Market	7.00%	4.00%	2.00%	1.70%

Major Competing Countries

Market Share

i) 051 UNITED KINGDOM	040 %
ii) 128 GERMANY WEST	040 %
iii) 265 JAPAN	012 %

Cumulative 3 year export potential for CDN products
in this Sector/Subsector: 1-3 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are
good market prospects

Current Total Imports

In Canadian \$

i) CATV CONSULTING	\$ 0.05 M
ii) ANTENNAS	\$ 0.05 M
iii) OTHER BROADCAST EQPT	\$ 0.02 M

The Trade Office reports that the following factors influence Canadian
export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be moderate

In the Trade Office's opinion, Canadian export performance in this sector
(sub-sector) in this market is lower than optimum mainly because of:

- No factors reported by mission

Export and Investment Promotion Planning System

MISSION: 436 DUBLIN

COUNTRY: 224 IRELAND

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: IF THE IRISH DEPARTMENT OF COMMUNICATIONS ADOPTS MMDS CANADIAN SPECIALIST COMPANIES WILL LINK UP AGAIN WITH IRISH CABLE TV FIRMS.

Results Expected: SUBSTANTIAL POTENTIAL FOR BOTH CONSULTANCY AND CATV EQUIPMENT.

Activity: IRISH DOC HAVE RECENTLY LEGALISED CONSUMER SATELLITE DISHES DISHES (INC CDN UNITS) HAVE BEEN MARKETED DESPITE RESTRICTIONS. FOLLOW-UP WITH IRISH IMPORTERS IN ANTICIPATION OF INCREASED SALES.

Results Expected: GROWING MARKET.

Activity: IRISH DOC HAVE RECENTLY LEGALISED CONSUMER SATELLITE DISHES. DISHES (INC CDN UNITS) HAVE BEEN MARKETED DESPITE RESTRICTIONS. FOLLOW UP WITH IRISH IMPORTERS IN ANTICIPATION OF INCREASED SALES

Results Expected: GROWING MARKET.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: MEET SENIOR MANAGEMENT OF ATLANTIC SATELLITES CONCERNING THEIR LAUNCH PLANS. FINAL DECISION AWAITED.

Results Expected: IF PROJECT GOES AHEAD, MAJOR WORK WILL BE UNDERTAKEN BY HUGHES SATELLITE WHO HAVE ALSO INVESTED IN IRISH COMPANY.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 436 DUBLIN

Market: 224 IRELAND

Sector: 008 TRANSPORT SYS, EQUIP, COMP, SERV.

Subsector: 085 AEROSPACE

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	100.00M	\$ 35.00M	\$ 39.00M	\$ 41.00M
Canadian Exports \$	10.00M	\$ 3.00M	\$ 4.00M	\$ 4.00M
Canadian Share of Import Market	10.00%	8.60%	10.20%	9.80%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	065 %
ii) 051 UNITED KINGDOM	013 %
iii) 112 FRANCE	010 %

Cumulative 3 year export potential for CDN products
in this Sector/Subsector: 5-15 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) AIRCRAFT	\$ 2.00 M
ii) AIRCRAFT ENGINES	\$ 2.00 M
iii) AIRCRAFT PARTS	\$ 1.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- other factor(s) described by the Trade Office as follows:

DEHAVILLAND HAVE STEPPED UP THEIR MARKETING EFFORT AND ARE NOW DEALING DIRECTLY WITH AER LINGUS COMMUTER, GUINNESS PEAT AVIATION AND RYANAIR.

Export and Investment Promotion Planning System

MISSION: 436 DUBLIN

COUNTRY: 224 IRELAND

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade fairs
- use of Canadian Government export promotion activities
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: CANADIAN PARTICIPATION AT THE 1987 NATIONAL AIR SHOW AT BALDONNELL MILITARY AIRFIELD.

Results Expected: IMPROVED PUBLICITY FOR CANADIAN AEROSPACE PRODUCTS.

Activity: REPRESENT CANADIAN EMBASSY DUBLIN AT PARIS AIR SHOW 1987.

Results Expected: TO EXPOSE SENIOR IRISH OFFICIALS OF CANADIAN AEROSPACE PRODUCTS.

Activity: SUPPORT AIRTECH IRELAND IN CANADIAN/IRISH JOINT VENTURE COMPANY TO DEMONSTRATE ITS PRIMARY TRAINER TO THE IRISH ARMY AIR CORPS.

Results Expected: HAVE CANADIAN TRAINER SPECS REFLECTED IN THE IRISH ARMY AIR CORPS REQUIREMENTS.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: TO CONTINUE WITH MARKETING EFFORTS ON BEHALF OF CDN AEROSPACE INDUSTRY AND REGULARLY CALL ON AER LINGUS, GUINNESS PEAT AVIATION AND RYANAIR.

Results Expected: POSSIBLY 2 DASH 7 AND 2 DASH 8.

Activity: TO ASSESS INTEREST OF GUINNESS PEAT AVIATION IN CAE SIMULATORS.

Results Expected: LEASING SIMULATORS ON A WORLDWIDE BASIS.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 436 DUBLIN

Market: 224 IRELAND

Sector: 015 CONSTRUCTION INDUSTRY

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	65.00M	\$ 63.00M	\$ 65.00M	\$ 70.00M
Canadian Exports \$	2.00M	\$ 0.35M	\$ 0.45M	\$ 0.60M
Canadian Share of Import Market	3.00%	0.55%	0.69%	0.86%

Major Competing Countries

Market Share

i) 224 IRELAND	080 %
ii) 051 UNITED KINGDOM	012 %
iii) 128 GERMANY WEST	003 %
iv) 112 FRANCE	002 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports
In Canadian \$

i) ARCHITECTURAL SERVICES	\$ 0.05 M
ii) TUNNELING	\$ 0.00 M
iii) BUILDING MATERIALS	\$ 0.20 M
iv) BUILDING EQUIPMENT	\$ 0.10 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be moderate
- approval of technical standards can present problems in the case of some imported products

Export and Investment Promotion Planning System

MISSION: 436 DUBLIN

COUNTRY: 224 IRELAND

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters
- other factor(s) described by the Trade Office as follows:
AWARENESS CONSTRUCTION PROJECTS ARE GENERALLY AWARDED TO LOCAL COMPANIES.

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada
- the availability of competitive Canadian financing

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: MONITOR AND REPORT FORTHCOMING DEVELOPMENTS RE DUBLIN DOWNTOWN TRANSPORT COMPLEX. PROPOSAL MADE BY CANADIAN CONGLOMERATE.

Results Expected: GOVERNMENT DECISION AWAITED LATE '86. IF NEGATIVE, THERE IS POSSIBILITY THAT NEW GOVT IN '87 MIGHT REVERSE DECISION.

Activity: FOLLOW UP ON CANADIAN APPROACHES TO IRISH AIRPORT AUTHORITY CONCERNING DUBLIN AIRPORT RUNWAY EXPANSION.

Results Expected: BETTER POTENTIAL IF JOINT VENTURE WITH IRISH CONSTRUCTION COMPANY IS ESTABLISHED.

Activity: ONGOING DISCUSSIONS WITH MANAGEMENT AT PARC CONSULTANTS CONCERNING HOSPITAL DEVELOPMENTS IN MIDDLE EAST.

Results Expected: SUBJECT TO CONSTRUCTION OF NEW HOSPITAL CONTRACTS IN MIDDLE EAST.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ASSESS AND REPORT ON GOVT PLANS TO CONSTRUCT NEW SUBURBAN RAIL LINK FROM DUBLIN CITY CENTRE TO WESTERN SUBURBS.

Results Expected: NO DEVELOPMENTS BEFORE 1989. IRISH TRANSPORT AUTHORITY (CIE) HAS BEEN MADE AWARE OF CANADIAN CAPABILITIES.

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional Projects approved and planned for the coming fiscal year.		

Mission: 436 DUBLIN

Sector: 002 FISHERIES, SEA PRODUCTS & SERV.

020 MISSION OUTGOING FISHERY EQUIPMENT	DUBLIN	0987
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Type of Event	Location	Date
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Promotional projects proposed for the two following fiscal years.

Mission: 436 DUBLIN

Sector: 001 AGRI & FOOD PRODUCTS & SERVICE

020 MISSION OUTGOING SPRING SHOW (AGRICULTURAL MACHINERY)	DUBLIN	0588
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Sector: 013 CONSUMER PRODUCTS

024 MISSION INCOMING MONTREAL FUR FAIR	MONTREAL	0588
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Export and Investment Promotion Planning System

87/88 Trade and Economic Overview

Mission: 437 LONDON

Country: 051 UNITED KINGDOM

IN SPITE OF A RELATIVELY POOR SHOWING OF THE ECON. EXPECTED FOR '86 & '87, THE UK MKTPLACE IS LIKELY TO REMAIN ONE OF THE MORE DYNAMIC IN EUROPE. THE IMF PREDICTS MODEST GROWTH FOR BRITAIN WHICH IS NOW IN ITS FIFTH YR OF ECON. RECOVERY. GROWTH OF THE GDP WILL NOT EXCEED 2.5% IN '86 & '87. IND'L PROD'N HAS ONLY MANAGED TO EXCEED THE '79 PEAK IN THE 2ND QUARTER OF '85 WHILST TOTAL MFTG OUTPUT REMAINS BELOW THE '73 & '79 PEAKS. THE GOVT ECON. STRATEGY HAS REMAINED LARGELY UNCHANGED SINCE THE CONSERVATIVES TOOK OFFICE IN '79. THE OVERALL OBJECTIVE HAS BEEN TO PURSUE POLICIES IN A MEDIUM-TERM FRAMEWORK TO PUT DOWNWARD PRESSURE ON INFLATION & THEREFORE ENCOURAGE A SUSTAINABLE RECOVERY. INFLATION HAS INDEED TAKEN A DOWNWARD PATH, HOWEVER, WAGE INCREASES AT AROUND 8% ARE STILL HIGH & THREATEN BETTER EMPLOYMENT PROSPECTS. THE ACTUAL GROWTH OF THE LABOUR FORCE IS SLOWING, BUT UNEMPLOYMENT SEEMS LIKELY TO REMAIN HIGH; THERE WERE 1.25MN UNEMPLOYED PEOPLE IN '79 COMPARED TO 3.25 MN AT THE BEGINNING OF '86. UNEMPLOYMENT, HIGH INTEREST RATES & CONTROVERSIAL TIGHTENING OF SOCIAL EXPENDITURES HAVE CONTRIBUTED TO FEED GROWING CONTROVERSY OVER SOME OF THE GOVT'S POLICIES. THE BRITISH GOVT HAS BEEN A PIONEER IN IMPLEMENTING A VAST PRIVATISATION PROGRAMME WHICH HAS RESULTED IN THE SALE OF 30 MAJOR COS SINCE '79. THE PROGRAMME OPERATES VIA THREE MECHANISMS: 100% SELLOUT; EMPLOYEE BUY-OUT; OR THE SALE OF EQUITY ON THE MKT. THE AIM OF THE GOVT IS TO MAXIMISE REVENUES FM THE DISPOSAL OF PUBLIC COS IN ORDER TO PERMIT CUTS IN INCOME TAX. THE PROGRAMME HAS BEEN SUCCESSFUL & CERTAIN OTHER COUNTRIES HAVE MODELLED SIMILAR PROGRAMME ON THE UK EXPERIENCE. BRITISH GAS, BRITISH AIRWAYS & BRITISH AIRPORT AUTHORITIES ARE SOON TO JOIN THE RANKS OF THE LARGE PUBLIC CORPORATION TO HAVE BEEN PRIVATISED. THE UK HAS ALWAYS BEEN A PRIME MARKET FOR CDN GOODS AND SERVICES. IN '85 SOME C\$2.4B WORTH OF GOODS WERE IMPORTED FM CDA. BRITAIN REMAINS OUR THIRD LARGEST TRADING PARTNER AFTER THE USA & JAPAN & ACCOUNTS FOR MORE THAN 35% OF OUR TOTAL EXPORTS TO THE EEC. EXPORTS OF THE IND'L RAW MATERIALS, FISH & AGRI. PRODS MAKE UP 85% OF OUR EXPORTS TO THE UK. IT WILL BE DIFFICULT TO MAINTAIN TRAD'L HIGH EXPORT VOLUME FOR THESE PRODS IN YRS TO COME GIVEN THE GROWING NEGATIVE IMPACT OF THE EEC'S COMMON AGRI. POLICY (CAP) ON CDA'S AGRI. EXPORTS & THE EVER-FEROCIDIOUS COMPETITION FM OTHER SUPPLIERS, PARTICULARLY IN THE FOREST PRODS SECTOR. THE SHRINKAGE OF BRITISH MFTG IND. ADVERSELY AFFECTS MKT PROSPECTS FOR CDN EXPORTS OF METALS & MINERALS. HOWEVER, THE HIGH TECH. SECTOR OFFERS GOOD OPPORT. FOR THE CDN EXPORTER. CDA SELLS SOME C\$100M WORTH OF TELECOM. & RELATED EQPT TO THE UK. IN THE RECENT YRS, THE BUSINESS COMMUNITY IN THE UK HAS BECOME MORE AWARE OF CDN CAPABILITIES IN HIGH TECH., PARTICULARLY IN TELECOMS, DEFENCE PRODS & COMPUTER HARDWARE. IT IS INTERESTING TO NOTE THAT THERE EXIST MORE THAN 100 TRANSFER OF TECH. AGREEMENTS BETWEEN CDN & BRITISH FIRMS.

Export and Investment Promotion Planning System

REPT: SYN-GEO 87/88 A. Post export program priorities

Region: WESTERN EUROPE

Mission: 437 LONDON

Market: 051 UNITED KINGDOM

The Mission selected the following sectors as priority areas for export promotion activities for the coming fiscal year:

1. 009 FOREST PRODUCTS, EQUIP, SERVICES

REASONS: -CANADA HAS TRADITIONALLY MAINTAINED A SIGNIFICANT SHARE OF THE UK MARKET
-CURRENCY REALIGNMENT HAS IMPROVED CANADA'S COMPETITIVE POSITION IN THIS PRICE-SENSITIVE SECTOR.

2. 004 DEFENCE PROGRAMS, PRODUCTS, SERV

REASONS: -ANNUAL MEETING OF RDP COMMITTEE IS IMPROVING THE ENVIRONMENT FOR EVENTUAL EXPANSION OF TWO-WAY TRADE & OF BUSINESS COOP. -UK INTEREST IN UPCOMING DND PROCUREMENT PROJECTS WILL OPEN DOORS TO OFFSET OPPORTUNITIES.

3. 005 COMM. & INFORM. EQP. & SERV

REASONS: UK MKT IS EXPANDING RAPIDLY. -N. AMERICA IS ACKNOWLEDGED SOURCE OF HI-TECH PRODS & SRVCS. -INCREASE SPECIAL 'N BY CDN EXPTRS & RECENT FALL OF CDN \$ TO THE PND HAVE FACILITATED MKT ENTRY FOR NEW EXPORTERS.

4. 001 AGRI & FOOD PRODUCTS & SERVICE

REASONS: COMPETITIVE PRICING KEY IN THIS SECTOR & CURRENCY FLUCTUATIONS OF LATE HAVE FAVOURED CDN EXP. DESPITE THE EEC CAP. -DEMAND IS STRONG IN UK. BUT CDN FIRMS OCCASIONALLY DIRECT THEIR LTD SUPPLY (EG FISH) TO USA MARKET.

5. 010 MINE, METAL, MINERAL PROD & SRV

REASONS: FAVOURABLE CURRENCY FLUCTUATIONS SHLD MARGINALLY IMPROVE CDN ACCESS TO UK MARKET IN THIS COMMODITY SECTOR. -EXPORT VOLUME IS SIGNIFICANT AND TRADE CHANNELS WELL ESTABLISHED.

6. 016 INDUSTRIAL MACHIN, PLANTS, SERV.

REASONS: MANUFACTURING AND MATERIALS HANDLING EQUIPMENT REPRESENT GROWING MARKET IN UK AS ECONOMIC GROWTH IS STIMULATED BY CAPITAL INVESTMENT.

The most important current Canadian export sectors to this market are (based on actual export sales):

1. 010 MINE, METAL, MINERAL PROD & SRV
2. 009 FOREST PRODUCTS, EQUIP, SERVICES
3. 003 GRAINS AND OILSEEDS
4. 005 COMM. & INFORM. EQP. & SERV
5. 012 PETROCHEM & CHEM PROD, EQP, SERV
6. 002 FISHERIES, SEA PRODUCTS & SERV.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 437 LONDON

Market: 051 UNITED KINGDOM

Sector: 001 AGRI & FOOD PRODUCTS & SERVICE

Subsector: 014 MEATS & MEAT BY-PRODUCTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	2900.00M	\$ 2850.00M	\$ 2802.00M	\$ 2600.00M
Canadian Exports \$	14.00M	\$ 13.00M	\$ 13.50M	\$ 14.00M
Canadian Share of Import Market	0.50%	0.50%	0.50%	0.50%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	002 %
ii) 354 NETHERLANDS	016 %
iii) 112 FRANCE	003 %
iv) 093 DENMARK	030 %
v) 606 BENELUX COUNTRIES	003 %
vi) 224 IRELAND	014 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 30-60 \$M

Current status of Canadian exports: Mature with little growth

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) BEEF OFFAL	\$ 7.00 M
ii) HIGH QUALITY (FROZEN) BEEF	\$ 5.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- there are import restrictions which can present significant problems
- the degree of import duty protection of local industry tends to be low
- approval of technical standards can present problems in the case of some imported products

Export and Investment Promotion Planning System

MISSION: 437 LONDON

COUNTRY: 051 UNITED KINGDOM

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- non competitive pricing
- non-tariff protectionist measures which are difficult to overcome
- other factor(s) described by the Trade Office as follows:
MARKET IS PRICE DRIVEN AND THEREFORE AFFECTED BY CURRENCY MOVEMENTS. HEALTH STANDARDS HAVE BECOME MAJOR NON-TARIFF BARRIER. MARKET IS BEING SHORTED AS NUMBER OF CERTIFIED CANADIAN ABATTOIRS IS DECLINING.

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- use of Canadian Government export promotion activities
- competitive export pricing for this market

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: SUBMISSION OF INFORMATION TO DEA PENDING POSSIBLE APPROACH TO USA /EEC COMMISSION CONCERNING HIGH QUALITY BEEF QUOTAS.

Results Expected: HOPEFULLY, REFORM OF THE SYSTEM BY WHICH HQ BEEF QUOTAS ARE ALLOCATED AND ADMINISTERED.

Activity: PREPARE MARKET PROFILE OF SUB-SECTOR.

Results Expected: STRATEGIC ANALYSIS OF THE SECTOR AND IDENTIFICATION OF POSSIBLE TRADE POLICY TRADE PROMOTION NEEDS AND OPPORTUNITIES.

Activity: REVIEW UK/EEC IMPORT REQUIREMENTS AND PROCEDURES AND DEVELOP INFORMATION STRATEGY.

Results Expected: REDUCE NUMBER OF TRADE DETRIMENTAL PROBLEMS CAUSED BY LACK OF COMPLIANCE BY CANADIAN EXPORTERS.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ACTIVE LIAISON WITH BRITISH GOVERNMENT AUTHORITIES (MINISTRY OF AGRICULTURE, HM CUSTOMS) IN ORDER TO ENHANCE RELATIONS WITH AGRICULTURE CANADA.

Results Expected: EARLY WARNING SYSTEM OF HEALTH/INSPECTION ISSUES.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 437 LONDON

Market: 051 UNITED KINGDOM

Sector: 002 FISHERIES, SEA PRODUCTS & SERV.

Subsector: 021 FISH & SHELLFISH & OTHER PROD

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size (import) \$	1020.00M	\$ 850.00M	\$ 681.00M	\$ 581.00M
Canadian Exports \$	45.00M	\$ 40.00M	\$ 35.00M	\$ 33.00M
Canadian Share of Import Market	4.40%	4.70%	5.10%	5.70%

Major Competing Countries

Market Share

i) 405 ICELAND	019 %
ii) 410 NORWAY	016 %
iii) 093 DENMARK	013 %
iv) 354 NETHERLANDS	007 %
v) 658 FAROE ISLANDS	005 %
vi) 112 FRANCE	003 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) FROZEN COD	\$ 142.00 M
ii) FROZEN SALMON	\$ 30.00 M
iii) LOBSTER	\$ 4.00 M
iv) COLD WATER SHRIMP	\$ 29.00 M
v) MUSSELS	\$ 3.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be moderate

Export and Investment Promotion Planning System

MISSION: 437 LONDON

COUNTRY: 051 UNITED KINGDOM

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- a lack of interest in the market on the part of Canadian exporters
- other factor(s) described by the Trade Office as follows:

LACK OF LONG TERM APPROACH TO THE EUROPEAN MARKET BY MANY COMPANIES IN FACE OF CURRENT STRONG USA MARKET. IF LTA COLLAPSES, CANADIAN FISH EXPORTS COULD FACE HIGH TARIFFS WITHOUT QUOTAS.

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada
- the existence of a bilateral economic/trade arrangement between Canada and this country

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: VISITS TO MAJOR UK FISH PURCHASERS FOLLOWED BY REGULAR CONTACT BY PHONE/LETTER.

Results Expected: ESTABLISHMENT OF MORE CONTACTS BETWEEN CDN AND BRITISH COMPANIES AND IMPROVED MARKET KNOWLEDGE.

Activity: CO TOUR OF CANADA PRECEDED BY NOTIFICATION TO 40 BRITISH COMPANIES OF THE VISIT, THEN SUBSEQUENT FOLLOW-UP OF SOURCING ENQUIRIES.

Results Expected: IMPROVED CONTACT BETWEEN CANADIAN & BRITISH COMPANIES.

Activity: PREPARE MARKET PROFILE OF SUB-SECTOR.

Results Expected: STRATEGIC ANALYSIS OF SECTOR & IDENTIFICATION OF POSSIBLE TRADE PROMOTION/TRADE POLICY NEEDS AND OPPORTUNITIES.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 437 LONDON

Market: 051 UNITED KINGDOM

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	500.00M	\$ 500.00M	\$ 400.00M	\$ 450.00M
Canadian Exports \$	30.00M	\$ 25.00M	\$ 23.30M	\$ 20.00M
Canadian Share of Import Market	6.00%	5.00%	5.00%	4.50%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	050 %
ii) 112 FRANCE	015 %
iii) 128 GERMANY WEST	015 %

Cumulative 3 year export potential for CDN products
in this Sector/Subsector: 60-100 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are
good market prospectsCurrent Total Imports
In Canadian \$

i) MAD ASW EQUIPMENT	\$ 0.00 M
ii) ASRAAM PROJECT DEFINITION	\$ 0.00 M
iii) CL227 RPVS (SWEDEN)	\$ 0.00 M
iv) SIMULATORS (CAL, CAE)	\$ 0.00 M
v) SPECIALIZED CASTINGS	\$ 0.00 M
vi) ELECTRICAL/ELECTRONIC COMPONENTS	\$ 0.00 M
vii) ECM EQUIPMENT	\$ 0.00 M
viii) P&W ENGINES PT9	\$ 0.00 M
ix) RPVS	\$ 0.00 M
x) DIPPING SONARS	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian
export performance in this market for this sector (sub-sector).

- exports of certain products or services to this country are subject to Canadian export controls
- the degree of import duty protection of local industry tends to be low

Export and Investment Promotion Planning System

MISSION: 437 LONDON

COUNTRY: 051 UNITED KINGDOM

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- the apparent limited sectoral capability in Canada compared to other competing export countries
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- non-tariff protectionist measures which are difficult to overcome
- other factor(s) described by the Trade Office as follows:

AS UK IS A MAJOR SUPPLIER OF DEFENCE EQUIPMENT TO THE WORLD MARKET, THERE IS A STRONG BUILT-IN BIAS ON THE PART OF UKMOD PROCUREMENT AUTHORITIES TO SOURCE DOMESTICALLY, HOWEVER, RECENT CALLS FOR MORE VALUE FOR MONEY SPENT CREATES NEW MARKET OPPORTUNITIES.

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada
- the existence of a bilateral economic/trade arrangement between Canada and this country

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: PROMOTE INDUSTRIAL COOPERATION LINKS BETWEEN CANADIAN & UK FIRMS IN CONNECTION WITH MAJOR DND PROCUREMENT PROJECTS (NSA, CASAP, TCCCS ETC.)

Results Expected: GREATER UK FAMILIARITY WITH CDN CAPABILITIES LEADING TO INDUSTRIAL TEAMING - LONG TERM INDUSTRIAL BENEFITS TO CANADA

Activity: FOLLOW UP TO FARNBOROUGH '86 AND RDP/UK TRADE INDUSTRIAL MISSION TO CANADA FALL '86

Results Expected: PURSUIT OF NEW RESEARCH, PRODUCTION AND MARKETING TARGETS.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: POST REPRESENTATIVE AT ANNUAL HITECH CONFERENCE IN OTTAWA (MAR '87) AND AT PARIS AIR SHOW (JUNE '87)

Results Expected: MEETINGS WITH SOME 75 CANADIAN EXPORTERS SEEING TO BOOST SALES TO UK AND INDUSTRY TO INDUSTRY COOPERATION

Export and Investment Promotion Planning System

MISSION: 437 LONDON

COUNTRY: 051 UNITED KINGDOM

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: HOST '87 RESEARCH DEVELOPMENT AND PRODUCTION (RDP) COMMITTEE MEETING (AND ATTENDANT TRADE/INDUSTRIAL MISSION) IN LONDON.

Results Expected: STIMULATE UK INTEREST IN GREATER INTER-GOVERNMENTAL AND INTER-INDUSTRY COOPERATION ON DEFENCE R&D & PROCUREMENT.

Activity: ORGANIZE CANADIAN COMPANY PRODUCT SEMINARS AT CANADA HOUSE FOR HAND PICKED UK AUDIENCE.

Results Expected: SUPPORT CANADIAN INDUSTRY MARKETING INITIATIVES RELATED PRIMARILY TO UKMOD BIDDING/SUB-CONTRACT POSSIBILITIES.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 437 LONDON

Market: 051 UNITED KINGDOM

Sector: 005 COMM. & INFORM. EQP. & SERV

Subsector: 054 COMPUTERS, SOFTWARE & SYSTEMS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	9000.00M	\$ 8000.00M	\$ 8500.00M	\$ 7800.00M
Canadian Exports \$	60.00M	\$ 55.00M	\$ 51.00M	\$ 62.00M
Canadian Share of Import Market	0.66%	0.68%	0.60%	0.79%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	038 %
ii) 265 JAPAN	012 %
iii) 128 GERMANY WEST	012 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) SOFTWARE	\$ 0.00 M
ii) DATA COMMUNICATIONS	\$ 0.00 M
iii) SPECIALISED HARDWARE	\$ 0.00 M
iv) COMPUTER SERVICES	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- exports of certain products or services to this country are subject to Canadian export controls

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- other factor(s) described by the Trade Office as follows:
MANY OF COMPANIES ARE SMALL FIRST TIME EXPORTERS & NEED SIGNIFICANT CONSULTATION. MORE VISITS REQUIRED. J/V & TECH TRANSFER ARRANGEMENTS ALSO IMPORTANT.

Export and Investment Promotion Planning System

MISSION: 437 LONDON

COUNTRY: 051 UNITED KINGDOM

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

- the adequacy of exporter information in Canadian Directories
- sourcing assistance from Canadian federal/provincial governments departments
- product/service information from Canadian companies

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: CONTINUE TO LIAISE WITH INDUSTRY/GOVT DEPARTMENT TO PROMOTE CANADIAN EXPERTISE.

Results Expected: EMPHASIS PLACED ON LICENSING/JOINT VENTURES WITH UK COMPANIES.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: CONVERSION OF OUR RECORDS ON UK DISTRIBUTORS REPRESENTATIVES TO WIN BASED SYSTEM ON COMPUTER.

Results Expected: GREATER PRODUCTIVITY ABILITY TO AUTOMATE MATCHING OF CANADIAN AND UK COMPANIES.

Activity: C. O. TOUR UPDATE ON CANADIAN SECTORAL CAPABILITIES.

Results Expected: GREATER KNOWLEDGE OF CAPABILITIES, IDENTIFICATION OF UK OPPORTUNITIES.

Activity: PLANNED SERIES OF CALLS ON PROSPECTIVE PARTNER FOR J/V AND INDUSTRIAL COOPERATION ARRANGEMENTS.

Results Expected: QUALITY ASSISTANCE TO CANADIAN ENQUIRERS AND MORE TARGETED APPROACH TO INDUSTRIAL TEAMING POSSIBILITIES.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 437 LONDON

Market: 051 UNITED KINGDOM

Sector: 009 FOREST PRODUCTS, EQUIP, SERVICES

Subsector: 092 WOOD AND WOOD PRODUCTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	2300.00M	\$ 2250.00M	\$ 2150.00M	\$ 2370.00M
Canadian Exports \$	270.00M	\$ 250.00M	\$ 191.00M	\$ 251.00M
Canadian Share of Import Market	12.00%	10.00%	8.90%	10.60%

Major Competing Countries

Market Share

i) 507 SWEDEN	020 %
ii) 504 FINLAND	013 %
iii) 553 UNION OF SOVIET SOC REP.	011 %
iv) 577 UNITED STATES OF AMERICA	009 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects

Current Total Imports

In Canadian \$

i) SOFTWOOD TIMBER	\$ 175.00 M
ii) HARDWOOD TIMBER	\$ 9.00 M
iii) PANELLING (CONSTRUCTION)	\$ 58.00 M
iv) FABRICATED WOOD PRODUCT	\$ 9.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- there are import restrictions which can present significant problems
- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- non competitive pricing
- high tariffs
- non-tariff protectionist measures which are difficult to overcome
- other factor(s) described by the Trade Office as follows:

PRODUCTS IN THIS SUB SECTOR ARE "COMMODITIES" AND PRICING IS IMPORTANT. CURRENCY FLUCTUATION HAS A SIGNIFICANT IMPACT ON MARKET SHARE. NEW PRODUCTION FROM DOMESTIC/PANEL PRODUCT MILL HAS COME ON STREAM. EEC QUOTAS ARE RESTRICTIVE.

Export and Investment Promotion Planning System

MISSION: 437 LONDON

COUNTRY: 051 UNITED KINGDOM

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade missions
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: PREPARE A MARKET PROFILE OF SUB SECTOR.

Results Expected: STRATEGIC ANALYSIS OF SECTOR & IDENTIFICATION OF TRADE POLICY/TRADE PROMOTION NEEDS AND OPPORTUNITIES.

Activity: FOLLOW UP ON EXPERIENCE OF LIFESTYLE PROJECT.

Results Expected: REPORT ON ROLE OF QUALITY CONTROL & ENERGY CONSERVATION IN THE TIMBER FRAME HOUSING MARKET.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ANALYSIS OF CONSTRUCTION GRADE SHEATHING MARKET - OPPORTUNITIES AND COMMERCIAL RESTRAINTS TO USE OF SOFTWOOD PLYWOOD.

Results Expected: MAINTAIN AND INCREASE MARKET SHARE IN INDUSTRIAL HOUSING AND COMMERCIAL MARKET.

Activity: IN CO-OPERATION WITH COUNCIL OF FOREST INDUSTRIES OF B. C. SURVEY OF WINDOW AND DOOR JOINERY MARKET.

Results Expected: PROVIDE DEFINITIVE ADVICE ON MARKET OPPORTUNITIES AND POSSIBLE CLIENTS FOR CANADIAN MANUFACTURERS.

Activity: ANALYSIS OF UK WOOD FURNITURE AND USE OF HARDWOOD IN SOLID WOOD AND UPHOLSTERED FURNITURE.

Results Expected: ESTABLISH PARAMETERS FOR CANADIAN HARDWOOD DIMENSION PRODUCERS IN EFFORT TO PENETRATE UK

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 437 LONDON

Market: 051 UNITED KINGDOM

Sector: 009 FOREST PRODUCTS, EQUIP, SERVICES

Subsector: 094 PULP AND PAPER PRODUCTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	2500.00M	\$ 2300.00M	\$ 2100.00M	\$ 2400.00M
Canadian Exports \$	450.00M	\$ 400.00M	\$ 351.60M	\$ 462.10M
Canadian Share of Import Market	18.00%	17.30%	16.70%	19.20%

Major Competing Countries

Market Share

i) 507 SWEDEN	025 %
ii) 504 FINLAND	015 %
iii) 577 UNITED STATES OF AMERICA	011 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) SOFTWOOD PULP	\$ 200.00 M
ii) SACK KRAFT PAPER	\$ 12.00 M
iii) NEWSPRINT	\$ 125.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- there are import restrictions which can present significant problems
- the degree of import duty protection of local industry tends to be low

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- non competitive pricing
- non-tariff protectionist measures which are difficult to overcome
- other factor(s) described by the Trade Office as follows:
CURRENCY FLUCTUATION HAS A SIGNIFICANT IMPACT ON COMPETITIVENESS OF CANADIAN PULP AND NEWSPRINT. EEC QUOTA NEWSPRINT COULD BECOME RESTRICTIVE.

Export and Investment Promotion Planning System

MISSION: 437 LONDON

COUNTRY: 051 UNITED KINGDOM

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: PREPARE A MARKET PROFILE OF SUB-SECTOR.

Results Expected: STRATEGIC ANALYSIS OF SECTOR & IDENTIFICATION OF TRADE POLICY/TRADE PROMOTION NEEDS AND OPPORTUNITIES.

Activity: CONTINUE CONTACT WITH UK NEWSPAPER EDITORS WHO HAVE BEEN STRONG SUPPORTERS OF CANADIAN PAPER SOURCES.

Results Expected: MAINTAIN POSITIVE UK HOBBY FOR CANADIAN INDUSTRY.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ANALYSIS OF "FREE SHEET" UTILIZATION OF NEWSPRINT TONNAGE TO ESTIMATE FORECAST FUTURE GROWTH PATTERN.

Results Expected: POSSIBLE CONSIDERATION OF APPROACH TO EEC, IF STUDY RESULTS WARRANT, TO MODIFY USE OF QUOTA NEWSPRINT FOR FREE SHEETS.

Activity: MEETING WITH SENIOR LEVEL OFFICIALS OF CANADIAN LONDON-BASED COMPANIES TO EXPLORE POSSIBLE APPROACHES TO UK GOVERNMENT AND ULTIMATELY, EEC, RE DUTY FREE NEWSPRINT QUOTA.

Results Expected: CONCERTED APPROACH TO UK GOVERNMENT ON VOLUME OF DUTY FREE NEWSPRINT QUOTA WHICH COULD COME UP FOR REVIEW IN BRUSSELS.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 437 LONDON

Market: 051 UNITED KINGDOM

Sector: 010 MINE, METAL, MINERAL PROD & SRV

Subsector: 102 MINERALS AND MINERAL PRODUCTS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	9700.00M	\$ 9500.00M	\$ 9400.00M	\$ 9200.00M
Canadian Exports \$	950.00M	\$ 900.00M	\$ 820.00M	\$ 620.00M
Canadian Share of Import Market	9.80%	9.50%	8.70%	6.70%

Major Competing Countries

Market Share

- | | |
|---------------------------------|-------|
| i) 609 EUROPEAN COMMON MARKET C | 030 % |
| ii) 512 SWITZERLAND | 025 % |

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects

Current Total Imports

- | | |
|------------------------------------|----------------|
| i) COAL | In Canadian \$ |
| ii) IRON ORES | \$ 1100.00 M |
| iii) CONCENTRATES, PRECIOUS METALS | \$ 580.00 M |
| iv) NICKEL ORES AND CONCENTRATES | \$ 500.00 M |
| v) ZINC ORES | \$ 180.00 M |
| | \$ 60.00 M |

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- non competitive pricing
- other factor(s) described by the Trade Office as follows:
CURRENCY FLUCTUATIONS AND UNITED KINGDOM'S DECLINING MANUFACTURING BASE HAVE SERVED TO INHIBIT SALES POTENTIAL TO THIS MARKET.

Export and Investment Promotion Planning System

MISSION: 437 LONDON

COUNTRY: 051 UNITED KINGDOM

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade missions
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: PREPARE A MARKET PROFILE OF SUB-SECTOR.

Results Expected: STRATEGIC ANALYSIS OF SECTOR & IDENTIFICATION OF TRADE POLICY/TRADE PROMOTION, NEEDS AND OPPORTUNITIES.

Activity: CONTACT WITH IMPORTANT BUYERS OF CANADA'S MINERAL PRODUCTS SUCH AS BRITISH STEEL, NATIONAL SULPHURIC ACID ASSOCIATION, ETC., WILL BE MAINTAINED.

Results Expected: HOLDING OR POSSIBLE INCREASING CANADA'S SHARE OF THE MARKET FOR COMMODITIES SUCH AS IRON ORE, SULPHUR, COKING COAL, ETC.

Activity: REGULAR LIAISON WILL CONTINUE WITH BOTH ASBESTOS INFORMATION CENTRE AND ASBESTOS INTERNATIONAL ASSOCIATION TO MONITOR DEVELOPMENTS REGARDING LEGISLATION.

Results Expected: REPORTS ON A REGULAR BASIS WILL BE MADE.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: CO-ORDINATED CORPORATE LIAISON ACTIVITY WITH POST IDP AN APPROACH TO BRITISH STEEL INDUSTRY TO EXPAND SECONDARY PROCESSING AND INVESTMENT IN CANADA.

Results Expected: BETTER INSIGHT INTO BRITISH STEEL LONG TERM CORPORATE STRATEGY.

Export and Investment Promotion Planning System

MISSION: 437 LONDON

COUNTRY: 051 UNITED KINGDOM

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: INVESTIGATE WHAT ECONOMIC ASSISTANCE OR OTHER COMPARATIVE ADVANTAGES INHERENT IN BRITISH STEEL INDUSTRY, ALLOWING THEM TO COMPETE WITH SUCCESSING INTL. MATS.

Results Expected: REPORT INTELLIGENCE GAINED TO CDN INTERESTS.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 437 LONDON

Market: 051 UNITED KINGDOM

Sector: 010 MINE, METAL, MINERAL PROD & SRV

Subsector: 104 METALS, PRIMARY & FABRICATED

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import)	\$ 11750.00M	\$10700.00M	\$10250.00M	\$ 9740.00M
Canadian Exports	\$ 350.00M	\$ 320.00M	\$ 290.00M	\$ 245.00M
Canadian Share of Import Market	3.00%	3.00%	2.80%	2.50%

Major Competing Countries

Market Share

i) 609 EUROPEAN COMMON MARKET C	000 %
ii) 577 UNITED STATES OF AMERICA	000 %
iii) 507 SWEDEN	000 %
iv) 410 NORWAY	000 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 100 \$M AND UP

Current status of Canadian exports: Well established and growing

Products/services for which there are good market prospects

Current Total Imports

	In Canadian \$
i) COPPER	\$ 1130.00 M
ii) LEAD	\$ 240.00 M
iii) NICKEL	\$ 225.00 M
iv) ZINC	\$ 200.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- non competitive pricing
- other factor(s) described by the Trade Office as follows:
CURRENCY FLUCTUATIONS & UNITED KINGDOM'S DECLINING MANUFACTURING BASE HAVE SERVED TO INHIBIT SALES POTENTIAL TO THIS MARKET.

Export and Investment Promotion Planning System

MISSION: 437 LONDON

COUNTRY: 051 UNITED KINGDOM

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- competitive export pricing for this market
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: PREPARE A MARKET PROFILE OF THE SUB-SECTOR.

Results Expected: STRATEGIC ANALYSIS OF SECTOR & IDENTIFICATION OF POSSIBLE TRADE POLICY/TRADE PROMOTION NEEDS AND OPPORTUNITIES.

Activity: ACTIVELY ENCOURAGE THE FORMATION OF THE NICKEL AND COPPER STUDY GROUPS; BASED IN UK IF POSSIBLE.

Results Expected: ESTABLISHMENT OF STUDY GROUPS.

Activity: ROLE OF LONDON AS CENTRE FOR INTERNATIONAL METALS (LME, ILZSG) MAKES THIS IMPORTANT LISTENING POST. A MORE STRUCTURED APPROACH TO REPORTING AND MONITORING WILL BE DEVELOPED.

Results Expected: PERIODIC INSIGHTS INTO INTERNATIONAL MARKET ACTIVITIES. STRATEGIC ANALYSIS OF INDIVIDUAL METALS.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 437 LONDON

Market: 051 UNITED KINGDOM

Sector: 011 OIL & GAS EQUIPMENT, SERVICES

Subsector: 116 MACHINERY AND EQUIPMENT

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	1500.00M	\$ 1500.00M	\$ 1400.00M	\$ 1900.00M
Canadian Exports \$	10.00M	\$ 5.00M	\$ 10.00M	\$ 10.00M
Canadian Share of Import Market	0.67%	0.33%	0.71%	0.53%

Major Competing Countries

Market Share

i) 577 UNITED STATES OF AMERICA	036 %
ii) 609 EUROPEAN COMMON MARKET C	023 %
iii) 410 NORWAY	009 %
iv) 354 NETHERLANDS	009 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 30-60 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects

Current Total Imports

In Canadian \$

i) DRILLING TOOLS AND EQUIPMENT	\$ 270.00 M
ii) DEVELOPMENT DRILLING	\$ 100.00 M
iii) SURVEYING	\$ 40.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low
- approval of technical standards can present problems in the case of some imported products

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- the apparent limited sectoral capability in Canada compared to other competing export countries
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- non-tariff protectionist measures which are difficult to overcome
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters
- other factor(s) described by the Trade Office as follows:

COLLAPSE OF OIL PRICES HAS SEVERELY RESTRICTED OIL EXPLORATION

Export and Investment Promotion Planning System

MISSION: 437 LONDON

COUNTRY: 051 UNITED KINGDOM

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- use of Canadian Government export promotion activities
- use of provincial governments export promotion activities
- competitive export pricing for this market

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

- the adequacy of exporter information in Canadian Directories

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: PREPARE A MARKET PROFILE OF SUB-SECTOR.

Results Expected: IDENTIFICATION OF TRADE PROMOTION NEEDS AND OPPORTUNITIES.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: A SYSTEMATIC PROGRAMME OF VISITS TO BUYERS WILL BE DEVELOPED. THIS WOULD BE GREATLY FACILITATED BY COMPREHENSIVE BROCHURES.

Results Expected: INCREASING AWARENESS OF CANADA'S CAPABILITIES AND HENCE INCREASE IN EXPORTS OF GOODS AND SERVICES.

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region: WESTERN EUROPE

Mission: 437 LONDON

Market: 051 UNITED KINGDOM

Sector: 016 INDUSTRIAL MACHIN, PLANTS, SERV.

Subsector: 161 MANUFACT & MATERIAL PLANT, EGP.

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	936.00M	\$ 920.00M	\$ 916.00M	\$ 887.00M
Canadian Exports \$	2.40M	\$ 2.00M	\$ 1.80M	\$ 1.60M
Canadian Share of Import Market	0.26%	0.22%	0.20%	0.18%

Major Competing Countries

Market Share

i) 128 GERMANY WEST	003 %
ii) 237 ITALY	006 %
iii) 577 UNITED STATES OF AMERICA	003 %
iv) 512 SWITZERLAND	002 %
v) 265 JAPAN	002 %
vi) 112 FRANCE	002 %

Cumulative 3 year export potential for CDN products in this Sector/Subsector: 5-15 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are good market prospects	Current Total Imports In Canadian \$
i) INJECTION MOULDING MACH.	\$ 320.00 M
ii) MOULDS-ACCESSORIES	\$ 200.00 M
iii) PORTION PACKAGING MACHINERY	\$ 200.00 M
iv) PACKAGING MATERIALS	\$ 200.00 M
v) SPARES	\$ 20.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low

Export and Investment Promotion Planning System

MISSION: 437 LONDON

COUNTRY: 051 UNITED KINGDOM

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- market prospect which are relatively new and have not yet been explored adequately by Canadian exporters
- other factor(s) described by the Trade Office as follows:
THE TRADE FAIRS FOR PACKAGING & PLASTICS MACHINERY ARE ON THREE YEAR CYCLES, SO THE EXPORT MARKET DEVELOPMENT TENDS ONLY TO RECEIVE A BOOST EVERY THREE YEARS.

Some Canadian exporters to this market in this sector(sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- participation in trade fairs
- use of Canadian Government export promotion activities
- competitive export pricing for this market

The Trade Office has recommended that a comprehensive market study of this sector (sub-sector) would enhance the knowledge of Canadian exporters to this market.

The Trade Office suggests that sourcing tools currently available to them have some limitations in particular:

- the adequacy of exporter information in Canadian Directories
- product/service information from Canadian companies

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: IDENTIFICATION & LISTING OF UK AGENTS FOR CANADIAN COMPANIES IN THIS SUB SECTOR. TO BE FULLY EFFECTIVE, POST REQUIRES COMPREHENSIVE INFO FROM HQ AND CDN SUPPLY CAPABILITIES.

Results Expected: A COMPREHENSIVE LISTING BY END FY 87/88 OF ALL CANADIAN COMPANIES EXPORTING TO THE UK TOGETHER WITH THEIR AGENTS.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: ESTABLISH A NETWORK OF KEY CONTACTS IN THE MAJOR INDUSTRY SECTORS IN ORDER TO HAVE GREATER ACCESS TO MARKET INTELLIGENCE.

Results Expected: IMPROVEMENT OF MARKET ACCESS FOR CANADIAN EXPORTERS, AND THE AVAILABILITY OF POTENTIAL EXPORT OPPORTUNITIES.

Export and Investment Promotion Planning System

MISSION: 437 LONDON

COUNTRY: 051 UNITED KINGDOM

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: INSTITUTE SCHEDULE OF INDUSTRY VISITS IN ORDER TO BROADEN KNOWLEDGE OF INDUSTRY STRUCTURE.

Results Expected: WIDENING OF MARKET SCOPE AVAILABLE TO CDN EXPORTERS.

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional Projects approved and planned for the coming fiscal year.		
Mission: 437 LONDON		
Sector: 001 AGRI & FOOD PRODUCTS & SERVICE		
010 FAIRS ROYAL AGRICULTURAL SHOW	STONELEIGH	0787
024 MISSION INCOMING INCOMING BUYERS FRUIT AND VEGETABLES		0587
Sector: 002 FISHERIES, SEA PRODUCTS & SERV.		
020 MISSION OUTGOING OUTGOING FISHERIES MISSION	SCOTLAND	0288
024 MISSION INCOMING INCOMING BUYERS FISH		0987
Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV		
020 MISSION OUTGOING DEFENCE TRADE & INDUSTRIAL MISSION TO LONDON, EN TRADE & INDUSTRIAL MISSION (RE. RDP COMMITTEE)	LONDON LONDON	1087 0987
Sector: 005 COMM. & INFORM. EQP. & SERV		
010 FAIRS COMPEC	LONDON	1187
Sector: 008 TRANSPORT SYS, EQUIP, COMP, SERV.		
010 FAIRS AUTO TRADE SHOW AUTOMOTIVE TRADE SHOW, LONDON, ENGLAND AUTOPARTAC - LONDON, ENGLAND OFFSHORE EUROPE '87, ABERDEEN, SCOTLAND	LONDON LONDON LONDON ABERDEEN	0088 0987 0388 0987
020 MISSION OUTGOING AUTO PARTS MISSION TO U. K., ITALY AND SPAIN		0587
Sector: 009 FOREST PRODUCTS, EQUIP, SERVICES		
010 FAIRS INTERBUILD	BIRMINGHAM	1187
020 MISSION OUTGOING HARDWOOD TIMBER MISSION FROM CANADA		0587
024 MISSION INCOMING TIMBER FRAME STUDY TOUR TO CANADA		0587

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional Projects approved and planned for the coming fiscal year.		
Mission: 437 LONDON		
Sector: 010 MINE, METAL, MINERAL PROD & SRV		
010 FAIRS INTERBUILD - BIRMINGHAM, ENGLAND	BIRMINGHAM	1187
024 MISSION INCOMING HARDWOOD LUMBER MISSION FROM U. K. TECHNICAL HOUSING MISSION FROM U. K.		0987 0987
Sector: 011 OIL & GAS EQUIPMENT, SERVICES		
010 FAIRS OCEANOLOGY INTERNATIONAL OFFSHORE EUROPE	BRIGHTON ABERDEEN	0388 0987
Sector: 014 EDUCATION, MEDICAL, HEALTH PROD		
010 FAIRS BRITISH LABORATORY WEEK	LONDON	0987
Sector: 017 SERVICE INDUSTRIES		
010 FAIRS INTERPLAS '87-INT'L PLASTICS & RUBBER EXH., BIRMINGHAM	BIRMINGHAM	1187
Sector: 999 MULTIPLE SECTORS		
024 MISSION INCOMING INCOMING BUYERS IN ASSCN WITH MAJOR CDN FAIRS		1087
Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 437 LONDON		
Sector: 001 AGRI & FOOD PRODUCTS & SERVICE		
010 FAIRS ROYAL AGRICULTURAL SHOW	STONELEIGH	0788
024 MISSION INCOMING INCOMING BUYERS MISSION AGRICULTURE		0988
Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV		
024 MISSION INCOMING TRADE & INDUSTRIAL MISSION (RE. RDP COMMITTED)		0988

Export and Investment Promotion Planning System

Type of Event	Location	Date
Promotional projects proposed for the two following fiscal years.		
Mission: 437 LONDON		
Sector: 005 COMM. & INFORM. EQP. & SERV		
010 FAIRS COMMUNICATIONS 88	BIRMINGHAM	0588
Sector: 006 ELECTRONICS EQUIP. & SERV		
010 FAIRS BRITISH ELECTRONICS WEEK	LONDON	0488
Sector: 016 INDUSTRIAL MACHIN. PLANTS, SERV.		
010 FAIRS INTERPLAS PAKEX	BIRMINGHAM BIRMINGHAM	0590 0589
Sector: 999 MULTIPLE SECTORS		
010 FAIRS I. F. E. FARNBOROUGH INTL AIR SHOW	LONDON LONDON	0289 0988

Export and Investment Promotion Planning System

87/88 Trade and Economic Overview

Mission: 703 BRUSSELS, NAC

Country: 038 BELGIUM

THE TRADE & IND'L DEV. (TID) PROGRAM AT THE DELEG'N IS CONSIDERABLY DIFFERENT FM NORMAL POST PROGRAMS. THE MAJOR DIFFERENCES ARE AS FOLLOWS: A) SECTORS. AS REPORTED IN SECTION ONE, ACTIVITIES ARE PRINCIPALLY IN THE DEFENCE PRODS SECTOR & RELATED COMMUN'NS AND ELECTRONICS SECTORS. B) MULTILATERAL FRAMEWORK: THE DELEG'N TID PROGRAM IS A MIXTURE OF TRADE PROMOTION, SYSTEMS DEV. PROJS & BID SUPPORT DEFENCE POLICY & ARMAMENTS COOP. FRAMEWORK POLICIES DEV. IN NATO OFFER CONSIDERABLE OPPORT. TO IMPROVE DEFENCE PRODS MKT ACCESS IN NATO NATIONS & THE COMMITTEE STRUCTURE IS OFTEN USED TO INTRODUCE PROD. & TECH. BRIEFINGS BY CDN FIRMS TO GROUPS OF NAT'L EXPERTS AS WELL AS NATO AGENCIES. SYST. DEV. PROGRAMS ARE MAINLY THE PURVIV OF THE CONF. OF NAT'L ARMAMENTS DIRECTORS & ITS SUBORDINATE GROUPS. BID OPPORT. ARE FOUND IN NATO INFRASTRUCTURE FINANCED PROGRAMS, AS WELL AS A NUMBER OF NATO AGENCIES. NATO ALSO SPONSORS OR SUPPORTS A LARGE NUMBER OF SEMINARS & SYMPOSIA WHICH ARE USED BY CDN FIRMS & GOVT OFFICERS TO PROMOTE TRADE & MKT AWARENESS. C) STATISTICAL BASE. THERE IS NO REALISTIC BASIS FOR IDENTIFYING MKT SIZE, MKT SHARES ETC AS IN NAT'L MKTS. THE NATO INFRASTRUCTURE, MILITARY & CIVIL BUDGETS AS WELL AS BUDGETS OF NATO AGENCIES ARE FINANCED BY NAT'L CONTRIBUTIONS AND ARE USED FOR A WIDE VARIETY OF PURPOSES OF WHICH ONLY A PORTION IS BID OPPORT. RELATED. DVLPMT PROGRAMS ARE FINANCED BY NAT'L R&D SHARES WHICH WILL RESULT IN LARGE TRADE PAY-OFFS WHEN THEY REACH PROD'N. DEFENCE PROGRAMS BUREAU STATISTICS SHOW SALES OF SOME \$150 MN TO NATO AGENCIES OVER THE PERIOD 1962-86. HOWEVER, THESE STATISTICS DO NOT REFLECT THE MAJOR SOURCE OF CDN SALES FOR NATO PROGRAMS - SUB-CONTRACTS TO MAJOR PRIMES & INTRA-CORP. SALES. EXAMPLES INCL. NORTH. TELECOM SALES TO THE U. S. AIR FORCE & SUBSEQUENT INSTAL'NS AT NATO BASES, COMPUTING DEVICES AIR DEFENCE DISPLAY SALES TO HUGHES, SENSTAR INC. SECURITY SALES TO PHILLIPS & SYSTEMHOUSE SALES TO RAYTHEON (U. S.) FOR NATO PROGRAM SOFTWARE. INTRA-CORP. SALES EXAMPLES INCL. AEL MICROTTEL/GTE & CDN MARCONI/MARCONI EUROPEAN COS. SUCH SALES ARE RECORDED AS BILATERAL SALES IN BOTH CASES. THE DELEG'N TID PROGRAM IN THE COMING YR & FOR SUBSEQUENT YRS WILL THEREFORE CONCENTRATE ON TRADE PROM'N/MKT ACCESS, SYST. DVLPMT OPPORT. & PURSUIT OF BID OPPORT. FOR BID OPPORT., EMPHASIS WILL BE PLACED ON DIRECTING CDN FIRMS TOWARDS JOINT VENTURES AND SUB-CONTRACTS WITH MAJOR INT'L PRIME CONTRACTORS. DVLPMT OPPORT. EXIST IN A MAJOR WAY WITHIN CNAD PROJS. EXAMPLES INCLUDE NAVAL SYST., PRECISION MUNITIONS, AIR FORCE WEAPONS, COMMUN'NS & ELECTR. PROJS. A MAJOR LIMITATION WILL BE AVAILABLE R&D FUNDS IN DND/CRAD & DRIE/DIPP TO SUPPORT CDN IND'L INVOLVEMENT. FINALLY, THE DELEG'N INTENDS TO CONTINUE A CLOSE WORKING ASSOC. WITH THE CDN NATO IND'L ADVISORY GROUP TO PROMOTE WIDER CDN IND'L AWARENESS OF NATO DEVELOPMENT OPPORTUNITIES AND POSSIBLE TRADE-OFFS FOR BILATERAL DEVELOPMENT PROJECTS.

Export and Investment Promotion Planning System

REF: SYN-GEO 87/88 A. Post export program priorities

Region:

Mission: 703 BRUSSELS, NAC

Market: 038 BELGIUM

The Mission selected the following sectors as priority areas for export promotion activities for the coming fiscal year:

1. 004 DEFENCE PROGRAMS, PRODUCTS, SERV

REASONS: DEFENCE PROG. IN NATO AS DISCUSSED IN THE OVERVIEW OFFER MAJOR SYSTEMS DVLPMT OPPORT. LEADING TO LARGE TRADE PAY-OFFS AT PROD'N STAGE. CDN IND PART'N IN NATO DEV. PROG. PROMOTES IND'L J.V. FOR BILATERAL PROGRAMS.

The most important current Canadian export sectors to this market are (based on actual export sales):

1. 004 DEFENCE PROGRAMS, PRODUCTS, SERV
2. 005 COMM. & INFORM. EQP. & SERV
3. 006 ELECTRONICS EQUIP. & SERV

Export and Investment Promotion Planning System

87/88 Sector/Sub-Sector Highlights
Submitted by Posts by Region

Region:

Mission: 703 BRUSSELS, NAC

Market: 038 BELGIUM

Sector: 004 DEFENCE PROGRAMS, PRODUCTS, SERV

Subsector: 999 ALL SUB-SECTORS

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size(import) \$	0.00M	\$ 0.00M	\$ 0.00M	\$ 0.00M
Canadian Exports \$	0.00M	\$ 0.00M	\$ 0.00M	\$ 0.00M
Canadian Share of Import Market	0.00%	0.00%	0.00%	0.00%

Major Competing Countries

Market Share

Cumulative 3 year export potential for CDN products
in this Sector/Subsector:

30-60 \$M

Current status of Canadian exports: Small but expanding

Products/services for which there are
good market prospects

Current Total Imports

In Canadian \$

i) NAVAL SYSTEMS	\$ 0.00 M
ii) SOFTWARE	\$ 0.00 M
iii) TACAN	\$ 0.00 M
iv) SECURITY SYSTEMS	\$ 0.00 M
v) COMMUNICATIONS	\$ 0.00 M
vi) ELECTRONIC SUB-SYSTEMS	\$ 0.00 M

Projects or portion of projects which are still in the planning
stage and for which Canadian companies might have reasonable prospects:i) Project Name: NATO DEFENCE SYSTEMS DEVELOPMENT
OPPORTUNITIES

Approximate Value: \$ M

Financing Source: 025 OTHER

For further info. please contact:

DEA 053-3745 J.HOLT-BNATO 21613

ii) Project Name: NATO INFRASTRUCTURE FINANCED PROGRAMS

Approximate Value: \$ M

Financing Source: 025 OTHER

For further info. please contact:

DEA 053-3745 J.HOLT-BNATO 21613

Export and Investment Promotion Planning System

MISSION: 703 BRUSSELS, NAC

COUNTRY: 038 BELGIUM

Projects or portion of projects which are still in the planning stage and for which Canadian companies might have reasonable prospects.

iii) Project Name: NATO AIRBORNE EARLY WARNING PROGRAM (NAPMA)
 Approximate Value: \$ M
 Financing Source: 025 OTHER
 For further info. please contact:
 DEA 053-3745 J. HOLT-BNATO 21613

iv) Project Name: NATO MAINTENANCE & SUPPLY AGENCY (NAMSA)
 Approximate Value: \$ M
 Financing Source: 025 OTHER
 For further info. please contact:
 DEA 053-3745 J. HOLT-BNATO 21613

The Trade Office reports that the following factors influence Canadian export performance in this market for this sector (sub-sector).

- the degree of import duty protection of local industry tends to be low
- approval of technical standards can present problems in the case of some imported products

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- the apparent limited sectoral capability in Canada compared to other competing export countries
- difficulties of adaptation of marketing techniques to the market by some Canadian companies
- non-tariff protectionist measures which are difficult to overcome
- other factor(s) described by the Trade Office as follows:

MOST SUCCESSFUL FIRMS WORK WITH MAJOR INTL PRIME CONTRACTORS FOR SUB-CONTRACTS. THERE ARE TOO MANY NTB'S FOR SPECIALIZED CANADIAN DEFENCE INDUSTRY TO WIN PRIME CONTRACTS. CANADIAN FIRMS MUST THEREFORE ESTABLISH LINKS WITH MAJOR PRIMES.

Some Canadian exporters to this market in this sector (sub-sector) have enjoyed success previously as a result of a variety of factors which the trade office reports to include:

- aggressive marketing on the part of Canadian Exporters
- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- competitive export pricing for this market
- strong sectoral capability in Canada
- the existence of a bilateral economic/trade arrangement between Canada and this country

Export and Investment Promotion Planning System

MISSION: 703 BRUSSELS, NAC

COUNTRY: 038 BELGIUM

In support of Canadian exports in this sector (sub-sector) the Trade Office is currently engaged in activities which include:

Activity: MANY NATO DEFENCE SYSTEMS DEVELOPMENT OPPORTUNITIES ARE IN EARLY PROGRAM STAGES (I. E. FEASIBILITY PHASE). OVER NEXT TWO YEARS, MANY WILL ENTER PROJECT DEFINITION, THE KEY PHASE FOR INDUSTRIAL PREPOSITIONING.

Results Expected: CDN FIRMS WILL BENEFIT IN RELATION TO CDN GOVERNMENT R&D SUPPORT FOR PROJ. DEFINITION AND SUBSEQUENT DEVELOPMENT & PRODUCTION.

Activity: POST COMMERCIAL/ECONOMIC OFFICERS INTEND TO MAKE CONCERTED EFFORT TO DIRECT CANADIAN FIRMS TOWARDS SUB-CONTRACTS AND JOINT VENTURES WITH MAJOR INTERNATIONAL PRIME CONTRACTORS.

Results Expected: MORE EFFECTIVE APPLICATION OF CANADIAN SPECIALIZED CAPABILITY TO THE MARKET.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this sector (sub-sector):

Activity: POST INTENDS TO PREPARE ANALYSIS OF POSSIBLE INITIATIVE IN AIR DEFENCE PRODUCTION SHARING FOR MAJOR NATO PROGRAM IN AIR COMMAND, CONTROL AND COMMUNICATIONS IN THE 1990'S.

Results Expected: IF DND/DEA POLICY GUIDELINES ARE AGREED, SUCH AN INITIATIVE COULD RESULT IN INCREASED LEVERAGE FOR CDN CONTRACTORS & POST COMMERCIAL/ECONOMIC OFFICERS.

