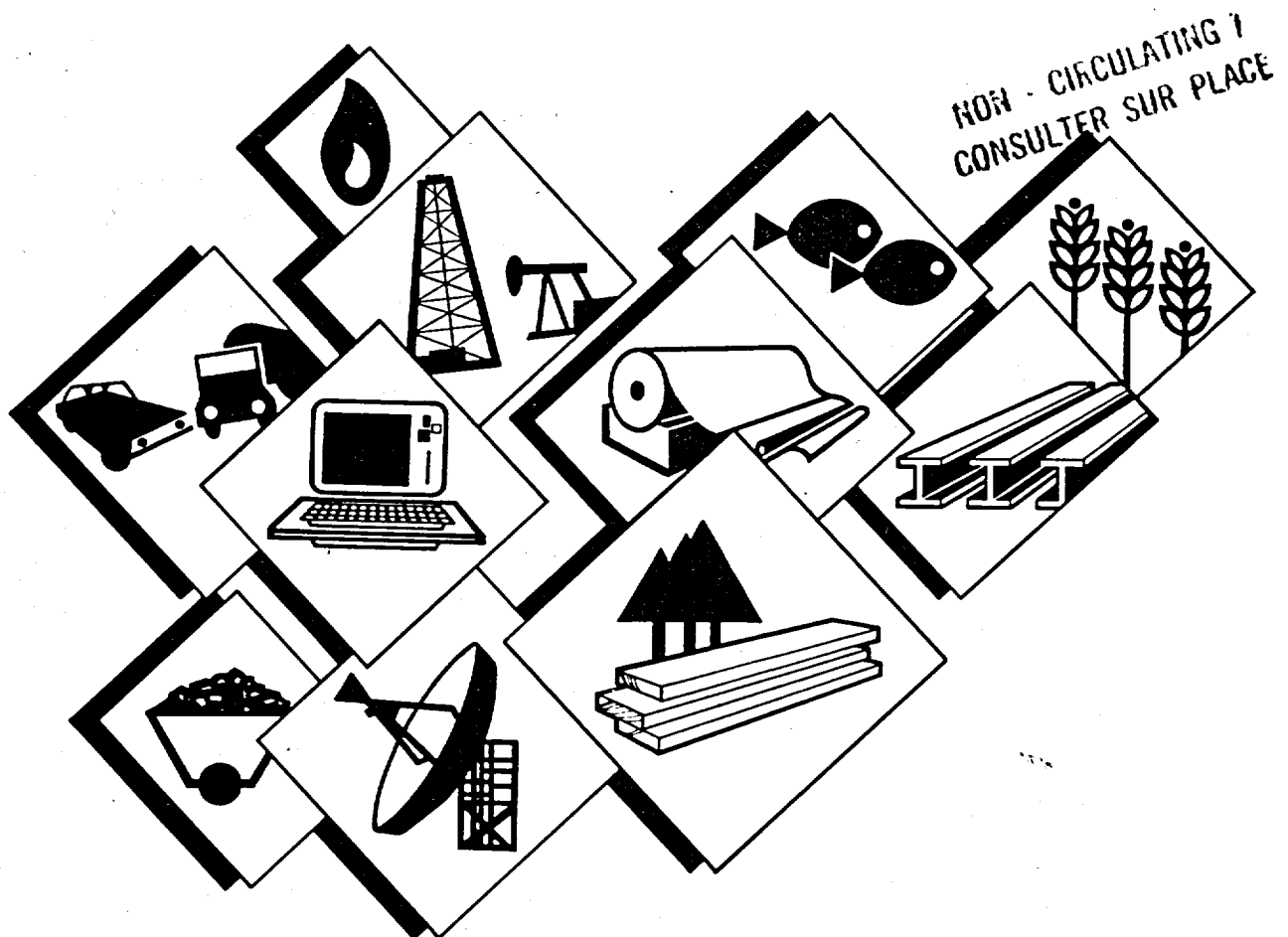




GEOGRAPHICAL SYNOPSIS

WESTERN EUROPE

1989-90 EXPORT AND INVESTMENT PROMOTION OPERATIONAL PLAN



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**GEOGRAPHIC SYNOPSIS OF
EXPORT PROMOTION PROGRAM PLANS
OF CANADIAN MISSIONS ABROAD
FY 1989/90**

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 in Western Europe for fiscal year 1989/90 commencing April 1, 1989.

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 alphabetically by mission and is available for each of seven geographic regions. A similar geographic synopsis is also available for the following geographic regions:

Latin America and Caribbean
Asia and Pacific
United States
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 as well as approved promotional projects in support of specific program activities.

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

The computerized planning system from which this report was produced was developed by the Department of External Affairs 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.

Dept. of External Affairs
Min. des Affaires extérieures
OTTAWA

JUL 25 1989

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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 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:

- 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 16 sectors and a variety of market reports. Information from these reports can be obtained on request from the geographic or sectoral bureaux of the Department 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 sectoral bureaux of the Department of External Affairs or the International Trade Centres located within the provincial offices of Industry, Science and Technology Canada (formerly DRIE) throughout Canada.

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

DEPARTMENT OF EXTERNAL AFFAIRS
Export and Investment Promotion Planning System
1989/90 Geographic Synopsis

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RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: ANKARA

Country: TURKEY

THE VOLUME OF BUSINESS VISITORS TO TURKEY FROM CANADA INCREASED 37% LAST YEAR. SIMILARLY, THE VOLUME OF BUSINESS VISITORS TO CANADA FROM TURKEY HAS ALSO INCREASED STEADILY. TRADE INQUIRIES FROM BOTH CANADA AND TURKEY HAVE ALSO RISEN. THESE TRENDS REFLECT AN INCREASING UNDERSTANDING ON THE PART OF THE BUSINESS COMMUNITIES OF THE TWO COUNTRIES THAT THE CANADIAN AND TURKISH ECONOMIES COMPLEMENT EACH OTHER, THEREBY OPENING MANY OPPORTUNITIES FOR BILATERAL TRADE EXPANSION. DURING THE LAST TWELVE MONTHS, THE TURKISH ECONOMY GREW AT A RATE OF 7%. AT THE SAME TIME, INFLATION HAS CLIMBED RAPIDLY, REACHING AN ESTIMATED 85% PER ANNUM AT THE END OF OCTOBER 1988. THE OZAL GOVERNMENT, RECOGNIZING THAT THE EXCESSIVE GROWTH IN THE ECONOMY WAS THE CENTRAL FACTOR PUSHING UP INFLATION, SEVERELY CUT BACK ON PUBLIC SECTOR INVESTMENT, EXCEPT IN CERTAIN CLEARLY-DEFINED SECTORS. ONLY SPECIFIC PUBLIC SECTOR PROJECTS ALREADY UNDERWAY WILL BE FUNDED; THESE INCLUDE THE ATATURK HYDRO DAM, THE COASTAL POWER PLANT PROJECTS, THE ATATURK AIRPORT (ISTANBUL), THE ANKARA METRO AND A FEW HIGHWAY PROJECTS. IN ADDITION TO THESE, HIGH PRIORITY MILITARY PROJECTS ARE UNAFFECTED BY THE AUSTERITY MEASURES. AS A RESULT OF RESCHEDULING IN 1980, 1988 WAS A PERIOD OF HEAVY DEBT REPAYMENT FOR TURKEY; SOME 7.3 BILLION DOLLARS WAS REQUIRED FOR DEBT SERVICING IN 1988, AND 7.9 BILLION WILL BE NEEDED IN 1989. DEBT SERVICING WILL REMAIN HIGH THROUGH 1990 AND THEN BEGIN TO DECLINE. THE COMBINATION OF HEAVY DEBT SERVICE AND HIGH INFLATION WILL LIMIT PUBLIC SECTOR CONTRACTING OPPORTUNITIES FOR THE NEXT 12 MONTHS; HOWEVER, THE TURKISH ECONOMY IS STILL EXPECTED TO MAINTAIN A REAL GROWTH RATE OF GREATER THAN 5% PER ANNUM OVER THE FORSEEABLE FUTURE. ACCORDINGLY, THERE REMAIN EXCELLENT BUSINESS OPPORTUNITIES IN ALL SECTORS FOR FIRMS WHICH ARE WILLING TO DO THE NECESSARY ADVANCE WORK TO POSITION THEMSELVES FOR THE BUSINESS EXPANSION WHICH IS EXPECTED IN THE 1990S. TURKEY REMAINS ONE OF THE MOST DYNAMIC MARKETS IN THE WORLD. WESTERN-ORIENTED, WITH A STABLE, SECULAR AND DEMOCRATIC GOVERNMENT, TURKEY'S HAS APPLIED FOR ENTRY INTO THE EEC. HER HIGH BIRTH RATE AND INDUSTRIOUS POPULATION WILL ENSURE THAT THE TURKISH DOMESTIC MARKET REMAINS DYNAMIC OF ITSELF. MOREOVER, TURKEY'S STRATEGIC POSITION ON THE HISTORIC TRADE ROUTES BETWEEN EUROPE AND THE MIDDLE EAST, ITS POSITION AMONG THE ISLAMIC COUNTRIES AND ITS EXPORT-ORIENTED ECONOMY SHOULD ALSO ENSURE THAT TURKEY REMAINS A GOOD CHOICE FOR INVESTMENT AIMED AT SERVING THIRD COUNTRY MARKETS. THE TURKISH GOVERNMENT HAS ESTABLISHED A LEGAL FRAMEWORK WHICH GUARANTEES THE FREE MOVEMENT OF INVESTMENT CAPITAL. IN ADDITION, SEVERAL INCENTIVE PROGRAMS HAVE BEEN INSTITUTED TO ENCOURAGE FOREIGN INVESTMENT. FOR ALL OF THE ABOVE REASONS, TURKEY SEEMS DESTINED TO BE AN EVER MORE IMPORTANT TRADING PARTNER FOR CANADA IN COMING YEARS.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 EXPORT PROMOTION PRIORITIES

Mission: ANKARA

Country: TURKEY

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

1. DEFENCE PROGRAMS, PRODUCTS, SERV
 WITHIN THE NEXT FIVE YEARS, TURKEY WILL BE PROCURING A WIDE VARIETY OF NEW DEFENCE EQUIPMENT, MUCH OF WHICH COULD BE SUPPLIED FROM CANADA. AMONG THE LARGEST OF THESE ARE A NEW LOW LEVEL AIR DEFENCE SYSTEM AND A NEW LIGHT/MEDIUM TRANSPORT AIRCRAFT.
2. TRANSPORT SYS, EQUIP, COMP, SERV.
 CANADA HAS ESTABLISHED A PREEMINENT POSITION IN URBAN TRANSIT IN TURKEY BY BEING SELECTED AS FINALIST FOR THE ANKARA METRO. ALMOST ALL OF TURKEY'S MAJOR CITIES WILL ALSO REQUIRE MASS TRANSIT SYSTEMS. TRANSPORTATION (INCLUDING ROAD, RAIL AND AIR) HAS BEEN ASSIGNED THE HIGHEST PRIORITY BY THE STATE PLANNING ORGANIZATION.
3. POWER & ENERGY EQUIP. & SERV.
 TURKEY HAS ONE OF THE MOST COMPREHENSIVE ELECTRIC POWER DEVELOPMENT PROGRAMS ON EARTH, WITH OVER 100 THERMAL AND HYDRO-ELECTRIC STATIONS PLANNED. THESE, PLUS UPGRADING OF THE POWER GRID, WILL OPEN OPPORTUNITIES FOR MANY CANADIAN SUPPLIERS.
4. OIL & GAS EQUIPMENT, SERVICES
 THE COMPLETION OF THE GAS PIPELINE FROM THE BULGARIAN BORDER TO ANKARA HAS OPENED UP MANY OPPORTUNITIES FOR CANADIAN SUPPLIERS OF BOTH GOODS AND SERVICES. A NEW LNG PORT IS ALSO PLANNED. TURKISH STATE PETROLEUM (TPAO) IS EAGER TO ENTER INTO JOINT VENTURES WITH CANADIAN FIRMS.
5. MINE, METAL, MINERAL PROD & SRV
 FOREIGN FIRMS ARE BEING ENCOURAGED TO APPLY FOR EXPORT PERMITS FOR GOLD, SILVER AND OTHER MINERALS. TURKEY'S HARD COAL MINES, LEAD-ZINC AND ALUMINUM SMELTERS ARE BEING MODERNIZED. THERE REMAINS A STRONG DEMAND FOR BASE METALS, THERMAL AND COKING COAL.
6. ADVANCED TECH. PROD. & SERV
 TURKEY IS JUST BEGINNING TO INTRODUCE AUTOMATED SYSTEMS INTO BANKING, BUSINESS, EDUCATION AND GOVERNMENT. THERE IS A DIMINISHED, BUT STILL VERY STRONG, DEMAND FOR NEW TELECOMMUNICATIONS EQUIPMENT OF ALL TYPES. CANADA IS WELL KNOWN IN TURKEY IN THIS SECTOR AS A RELIABLE SUPPLIER OF SUPERIOR GOODS AND SERVICES.

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

- | | |
|-------------------------------------|--------------------------------------|
| 1. ADVANCED TECH. PROD. & SERV | 4. TRANSPORT SYS, EQUIP, COMP, SERV. |
| 2. MINE, METAL, MINERAL PROD & SRV | 5. DEFENCE PROGRAMS, PRODUCTS, SERV |
| 3. FOREST PRODUCTS, EQUIP, SERVICES | 6. AGRI & FOOD PRODUCTS & SERVICE |

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ANKARA

Market: TURKEY

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1700.00 \$M	1900.00 \$M	1800.00 \$M	1400.00 \$M
Canadian Exports	0.43 \$M	24.40 \$M	5.00 \$M	50.00 \$M
Canadian Share of Market	0.02 %	1.28 %	0.27 %	3.57 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	50.00 %
SWITZERLAND	10.00 %
UNITED KINGDOM	3.00 %
GERMANY WEST	20.00 %
ITALY	10.00 %
BELGIUM	2.00 %

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

Products/services for which there are good market prospects:

1. LOW LEVEL AIR DEFENCE SYSTEM AND RELATED PROGRAMS
2. SHORT/MEDIUM RANGE MILITARY TRANSPORT AIRCRAFT
3. ASW/COASTAL PATROL AIRCRAFT
4. SHIPBOARD ELECTRONIC SYSTEMS
5. MULTI-ROLE HELICOPTER CO-PRODUCTION PROGRAM
6. NORTHROP F-5A/B REFURBISHMENT PROGRAM
7. SUPPLY & CO-PROD. IN TURNKEY OF MINE COUNTERMEASUR
8. NIGHT VISION DEVICES (THERMAL)
9. SURVEILLANCE DRONES AND RPVS
10. TURKISH ARMED FORCES INTEGRATED COMMUNICATION SYS.
11. SUPPLY OF FAST ATTACK VESSELS
12. ORDINANCE/GUNS/HOWITZER MODERNIZATION PROGRAM

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ANKARA

Market: TURKEY

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- Competitive Canadian financing
- Willingness of exporters to invest/joint venture in territory
- GOOD LOCAL AGENT; GOOD
- UNDERSTANDING OF LOCAL
- MARKET CONDITIONS

Factors for Canadian exports not reaching market potential:

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

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

Activity: FINAL NEGOTIATIONS OF LLAD CONTRACT
Expected Results: CONTRACT AWARD TO CDN SUPPLIER

Activity: AGGRESIVE MARKETING OF CDN TRANSPORT AIRCRAFT CAPABILITY
Expected Results: SHORT LISTING OF CDN SUPPLIER

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

Activity: IDEA 89 INT'L DEFENCE, ELECTRONICS AND AVIONICS SHOW
Expected Results: INCREASE AWARENESS BY TURKISH MILITARY OF CDN DEFENCE SYSTEMS/PRODUCTS

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ANKARA

Market: TURKEY

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

Activity: VISIT TO CDA BY TURKISH MINISTER OF NATIONAL DEFENCE
Expected Results: PROMOTE CDN CAPABILITY IN DEFENCE SECTOR & ADATS/DASH-8/CL-215T SELECTION OF ADATS

Activity: PRESENT A BRIEFING BY DEHAVILLAND AIRCRAFT OF CDA LTD.
Expected Results: PROMOTE DASH-8

Activity: ORGANIZATION OF VISIT OF CDN DEFENCE MISSION TO TERRITORY
Expected Results: INCREASE FAMILIARITY OF TURKISH MILITARY WITH CDN DEFENCE SYSTEMS; HELP CDN FIRMS KNOW TURKISH MILITARY.

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

SUPPLY AND CO-PRODUCTION IN TURKEY OF MINE COUNTERMEASURES
Approximate Value: 300 M\$
Financing Source: EDC - Export Dev Corporation
DOM - Domestically funded
Contact: R. G. FARREL 136 12 76

SUPPLY OF COASTAL PATROL/ASW AIRCRAFT
Approximate Value: 350 M\$
Financing Source: EDC - Export Dev Corporation
DOM - Domestically funded
Contact: C. DZGUC 136 12 76

TURKISH ARMED FORCE INTEGRATED COMMUNICATIONS SYSTEM (TAFICS)
Approximate Value: 3000 M\$
Financing Source: EDC - Export Dev Corporation
DOM - Domestically funded
Contact: :

F5-A/B REFURBISHMENT PROGRAM
Approximate Value: 50 M\$
Financing Source: EDC - Export Dev Corporation
DOM - Domestically funded
Contact: :

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ANKARA

Market: TURKEY

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: TELECOM, DATACOM, SAT, SPACECOM

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	300.00 \$M	300.00 \$M	200.00 \$M	220.00 \$M
Canadian Exports	141.00 \$M	140.00 \$M	100.00 \$M	100.00 \$M
Canadian Share of Market	47.00 %	46.00 %	50.00 %	45.00 %

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

Major Competing Countries Market Share

BELGIUM	15.00 %
GERMANY WEST	20.00 %
JAPAN	15.00 %

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

Products/services for which there are good market prospects:

1. DIGITAL TELEPHONE EXCHANGES
2. RURAL TELECOMMUNICATION EQUIPMENT
3. SATELLITE EARTH STATIONS
4. CELLULAR TELEPHONES

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Competitive pricing
- Strong sectoral capability in Canada
- Competitive Canadian financing
- willingness of exporters to invest/joint venture in territory
- CDA WAS AN EARLY INVESTOR
- IN THE TURKISH TELECOMM.
- SECTOR.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ANKARA

Market: TURKEY

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

Activity: CDN SOLO TECHNOLOGY FAIR - FEBRUARY 89, ISTANBUL
Expected Results: NEW CONTACTS FOR JV POSSIBILITIES WITH TURKISH FIRMS FOR PROMOTION OF TELECOMMUNICATIONS EQUIPMENT AND SERVICES

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

Activity: INCOMING INFORMATICS AND COMMUNICATIONS TECHNOLOGY MISSION
Expected Results: INCREASED AWARENESS OF CDN CAPABILITY

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

SOUTH ANATOLIAN DEVELOPMENT PROJECT	Approximate Value: 100 M\$ Financing Source : Contact : R. G. FARRELL, D. CLENNING AKIN KOSETORUNU TEL: 136 12 77
FREE ZONES TELECOMMUNICATIONS PROJECT	Approximate Value: 20 M\$ Financing Source : Contact : D. CLENNING AKIN KOSETORUNU

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1 TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ANKARA

Market: TURKEY

Sector : POWER & ENERGY EQUIP. & SERV.

Sub-Sector: HYDRO

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	500.00 \$M	325.00 \$M	201.00 \$M	262.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.00 \$M	15.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	5.70 %

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

Major Competing Countries Market Share

JAPAN	20.00 %
FRANCE	15.00 %
GERMANY WEST	10.00 %
PEOPLE'S REP OF CHINA	5.00 %
YUGOSLAVIA	5.00 %
ITALY	5.00 %

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

Products/services for which there are good market prospects:

1. HYDROELECTRIC POWER SYSTEMS, EQPT..., TURBINES

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- CIDA programs
- Strong sectoral capability in Canada
- Willingness of exporters to invest/joint venture in territory
- INTEREST OF SOME CDN FIRM
- IN BUILD-OPERATE-TRANSFER
- PROJECT

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ANKARA

Market: TURKEY

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Non-competitive financing
- LOW LEVEL OF INTEREST FROM CDN FIRM
- BUDGETARY CONSTRAINTS

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

Activity: CONCLUSION OF FUNDING ARRANGEMENTS FOR LAMAS RIVER PROJECT
Expected Results: CONTRACT SIGNING

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

Activity: PROMOTION OF CDN HYDROELECTRIC CAPABILITY
Expected Results: HAVE AT LEAST ONE CDN FIRM TO ENTER NEGOTIATIONS WITH TURKISH GOV'T FOR A DAM & HEPP PROJECT ON BOT BASIS

Activity: PROMOTE CDN CAPABILITY FOR REHABILITATION OF HYDRO PLANTS
Expected Results: AWARD OF CONTRACT TO AT LEAST UN CDN FIRM FOR HEPP UPGRADING PROGRAM

Activity: REPORT ON OPPORTUNITIES IN HYDRO-POWER -POWER GEN. SECTOR
Expected Results: ENCOURAGEMENT OF CDN SUPPLIERS TO CONSIDER OPPORTUNITIES IN TURKEY, ESPECIALLY IN GAP REGION

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ANKARA

Market: TURKEY

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

HEPPS INCLUDED IN GAP PROJECT Approximate Value: 1000 M\$
 Financing Source : OTHER
 Contact : R. G. FARRELL, TEL:136 12 77

APPROXIMATELY 40 HEPP PROJECTS Approximate Value: 50 M\$
THROUGHOUT TURKEY UNDER BOT Financing Source : OTHER
 Contact : C. OZGUC, TEL: 136 12 77 RWT

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ANKARA

Market: TURKEY

Sector : POWER & ENERGY EQUIP. & SERV.

Sub-Sector: THERMAL

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	110.00 \$M	280.00 \$M	125.00 \$M	200.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.00 \$M	0.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	0.00 %

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

Major Competing Countries

Market Share

GERMANY WEST	20.00 %
AUSTRIA	15.00 %
POLAND	15.00 %
ITALY	10.00 %
CZECHOSLOVAKIA	10.00 %
FRANCE	10.00 %

Current Status of Canadian
exports in this sector/subsector: Market share declining

Products/services for which there are good market prospects:

1. FOSSIL STEAM GENERATING BOILERS, TURBINES, VALVES

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Non-competitive financing
- RELUCTANCE TO ACCEPT BUILD-OPERATE
- TRANSFER (B.D.T.) MODEL

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ANKARA

Market: TURKEY

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

Activity: SELECTION OF ONE OF THE TWO INTERNATIONAL CONSORTIA
Expected Results: SUB-CONTRACT AWARD FOR CANADIAN FIRM

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

Activity: PROMO. OF CDN TECH IN LIGNITE UPGRADING FOR POWER GENERATION
Expected Results: OPENING OF NEW OPPORTUNITIES FOR CDN ENGINEERING COMPANIES
IN POWER DEVELOPMENT

Activity: PROMO. OF CDN TECH. IN UPGRADING OF EXISTING THERMAL PLANTS
Expected Results: CONTRACT AWARD TO A CDN FIRM FOR IMPLEMENTATION WORK ON
THERMAL POWER PLANT REHABILITATION PROGRAM.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ANKARA

Market: TURKEY

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

NEW COAL FIRED POWER PLANT
PROJECTS

Approximate Value: 500 M\$
Financing Source : EDC - Export Dev Corporation
DOM - Domestically funded
Contact : R. G. FARRELL, TEL: 136 12 77
C. OZGUC TEL:136 12 77 EXTOTT

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ANKARA

Market: TURKEY

Sector : POWER & ENERGY EQUIP. & SERV.

Sub-Sector: NUCLEAR

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

Major Competing Countries	Market Share
CANADA	0.00 %
GERMANY WEST	0.00 %
FRANCE	0.00 %
UNITED STATES OF AMERICA	0.00 %
JAPAN	0.00 %
ITALY	0.00 %

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

Products/services for which there are good market prospects:

1. CANDU REACTOR
2. PRESSURIZERS, GENERATORS, TURBINES

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Provincial export promotion
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- Bilateral economic trade agreement
- Willingness of exporters to invest/joint venture in territory
- INFLUENTIAL LOCAL PARTNER

Factors for Canadian exports not reaching market potential:

- Non-competitive financing
- LACK OF FINANCING AVAILABLE,
- RELUCTANCE TO ACCEPT BOT FORMULA

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ANKARA

Market: TURKEY

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

Activity: OBTAINING OF \$1.5 BN FINANCING; ACCEPTANCE OF BOT FORMULA.
Expected Results: ACCEPTANCE OF BOT BY CDN GOVT & SECURING FINANCING WILL RESULT IN CANDU SALE. CANDU TECH. IS FAVOURED BY TURKISH GOVT.

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

Activity: COMPLETION OF NEW FUNDING FORMULA PROP.-NEW FOREIGN PARTICI.
Expected Results: SIGNING OF CONTRACT.

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

PROCUREMENT/INSTALLATION OF A 15-20 MW NUCLEAR REACTOR
Approximate Value: 30 M\$
Financing Source : DOM - Domestically funded
EDC - Export Dev Corporation
Contact : R. G. FARRELL

ATOMIC ENERGY INSTITUTION REACTOR-EXPERIMENTAL PUPOSES
Approximate Value: 0 M\$
Financing Source :
Contact : C. OZGUC

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ANKARA

Market: TURKEY

Sector : POWER & ENERGY EQUIP. & SERV.

Sub-Sector: TRANSMISSION

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	410.00 \$M	300.00 \$M	150.00 \$M	300.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.00 \$M	0.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	0.00 %

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

Major Competing Countries

Market Share

JAPAN	15.00 %
GERMANY WEST	15.00 %
ITALY	15.00 %
YUGOSLAVIA	15.00 %
FRANCE	10.00 %
UNITED KINGDOM	10.00 %

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

Products/services for which there are good market prospects:

1. 380 KV TRANSMISSION LINE TURNKEY PROJECTS
2. SUPPLY OF LINE HARDWARE/INSULATORS
3. SUPPLY OF LOAD MGMT/DISTRIBUTION CONTROL SYSTEMS
4. TRANSMISSION LINE STRINGING & MAINTENANCE EQPT.
5. CONSULTANCY SERVICES-TRAINING PACKAGES, POWER DIST.
6. SIMULATORS FOR POWER TRANSMISSION/DISTRIBUTION
7. SCADA SYSTEMS

Factors contributing to current successful Canadian exports:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ANKARA

Market: TURKEY

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Non-competitive financing
- Market prospects have not been adequately explored
- LACK OF INTEREST IN TURKISH POWER
- TRANSMISSION LINE, INSTALLATION, ETC

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

Activity: PARTI. BY CDN FIRMS IN TURKISH POWER TRANS. LINE PROJECTS
Expected Results: SECURING OF CONTRACT

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

Activity: PUBLICIZATION OF DETAILS OF TURKISH POWER LINE CONST. PROJECT
Expected Results: PARTICIPATION OF AT LEAST ONE CDN COMPANY IN TENDERING PROCESS FOR TURKISH POWER LINE CONSTRUCTION PROJECTS.

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ANKARA

Market: TURKEY

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

PROCUREMENT OF TRANSMISSION	Approximate Value:	100 M\$
LINES AND ASSOCIATED HARDWARE	Financing Source :	IBRD - World Bank DOM - Domestically funded
	Contact	: R. G. FARRELL 136 12 76 C. DZGUC 136 12 76 EXTOTT/RWT

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ANKARA

Market: TURKEY

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: URBAN TRANSIT

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	100.00 \$M	125.00 \$M	100.00 \$M	50.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.00 \$M	40.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	80.00 %

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

Major Competing Countries	Market Share
CANADA	0.00 %
SWEDEN	100.00 %
GERMANY WEST	0.00 %
FRANCE	0.00 %
BELGIUM	0.00 %
UNITED KINGDOM	0.00 %

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

Products/services for which there are good market prospects:

1. HEAVY RAIL URBAN TRANSIT SYSTEMS
2. LIGHT RAIL URBAN TRANSIT SYSTEMS
3. URBAN TRANSIT CONSULTING

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Provincial export promotion
- Competitive pricing
- Strong sectoral capability in Canada
- Competitive Canadian financing
- Willingness of exporters to invest/joint venture in territory
- WELL CHOSEN LOCAL PARTNER

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ANKARA

Market: TURKEY

Factors for Canadian exports not reaching market potential:

- Market prospects have not been adequately explored
- SUSPENSION OF URBAN TRANSIT PROJECT
- DUE TO BUDGETARY CONSTRAINTS

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

Activity: COMPLETION OF FINAL NEGOTIATIONS ON ANKARA URBAN TRANSIT PRO
Expected Results: SIGNING FINAL CONTRACT AND START OF CONSTRUCTION WORK

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

Activity: PREPARATION OF A TURNKEY PROPOSAL FOR BURSA LIGHT RAIL TRANS
Expected Results: AN ATTRACTIVE PACKAGE MAY RESULT IN A CONTRACT AWARD ON SOLE SOURCE BASIS

Activity: SUBMISSION OF A PROPOSAL TO IZMIR MUNICIPALITY - STUDY
Expected Results: AN EXTERNALLY-FUNDED STUDY COULD LEAD TO AWARD OF STUDY CONTRACT TO CDN FIRMS ON SOLE SOURCE BASIS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ANKARA

Market: TURKEY

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

ISTANBUL HEAVY RAIL METRO AND	Approximate Value:	2500 M\$
BOSPHORUS UNDERWATER TUNNEL	Financing Source :	EDC - Export Dev Corporation DOM - Domestically funded
	Contact	: R. G. FARREL, PHONE 136 12 77 CAN DZGUC

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ANKARA

Market: TURKEY

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: RAIL

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	250.00 \$M	250.00 \$M	200.00 \$M	200.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.00 \$M	20.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	2.50 %

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

Major Competing Countries	Market Share
JAPAN	25.00 %
SOUTH AFRICA	20.00 %
UNITED STATES OF AMERICA	15.00 %
GERMANY WEST	15.00 %
ITALY	15.00 %
FRANCE	10.00 %

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

Products/services for which there are good market prospects:

1. SUPPLY OF TRACK OVERHAUL EQUIPMENT
2. SUPPLY OF LOCOMOTIVE CREW TRAINING SIMULATOR
3. SIGNALIZATION/ELECTRIFICATION SYSTEMS

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Competitive pricing
- Strong sectoral capability in Canada
- GOOD SUPPORT SERVICES
- FROM LOCAL AGENTS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ANKARA

Market: TURKEY

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Unsuitable product
- Non-competitive financing
- Market prospects have not been adequately explored
- RELUCTANCE OF CDN FIRMS TO AGGRES.
- PURSUE BUSINESS. LOW TURK. PRIORITY

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

Activity: ORGANIZE A BRIEFING ON CDN RAIL COMMUTER TECHNOLOGY
Expected Results: INFLUENCE THE SPECIFICATIONS TO FAVOUR CDN TECHNOLOGY

Activity: SECURE AT LEAST ONE CDN BIDDER FOR EACH TENDER
Expected Results: CONTRACT AWARDS TO CDN FIRMS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ANKARA

Market: TURKEY

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

OPPORTUNITIES TO SUPPLY A WIDE VARIETY OF RAILWAY EQUIPMENT Approximate Value: 50 M\$
Financing Source : IBRD - World Bank
DOM - Domestically funded
Contact : R. G. FARREL/CAN OZGUC
EXTOTT RWT

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ANKARA

Market: TURKEY

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: AEROSPACE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1600.00 \$M	1240.00 \$M	600.00 \$M	600.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	2.20 \$M	50.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.40 %	1.60 %

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

Major Competing Countries Market Share

UNITED STATES OF AMERICA	40.00 %
GERMANY WEST	20.00 %
FRANCE	20.00 %
ITALY	10.00 %
UNITED KINGDOM	5.00 %
SPAIN	5.00 %

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

Products/services for which there are good market prospects:

1. SUPPLY/PRO. MILITARY TRANSPORT AIRCRAFT SHORT/MED.
2. REGIONAL CIVIL TRANSPORT AIRCRAFT
3. EXECUTIVE AND CARGO TRANSPORT HELICOPTERS
4. FOREST FIRE FIGHTING AIRCRAFT

Factors contributing to current successful Canadian exports:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ANKARA

Market: TURKEY

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Non-competitive financing
- Market prospects have not been adequately explored
- BUDGETARY CONSTRAINTS IN THE HOST
- COUNTRY

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

Activity: SUBMISSION OF A PROPOSAL FOR LEASE OF TWO FEEDER LINE AIRCRAFT
Expected Results: PENETRATING OF TURKISH CIVIL AVIATION MARKET

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

Activity: START TALKS ON CO-PRODUCTIONS OF REGIONAL CARRIER
Expected Results: CONCLUSION OF AGREEMENT TO CO-PRODUCE AIRCRAFT DASH-8

Activity: SUBMISSION OF A PROPOSAL TO SUPPLY FOREST FIRE AIRCRAFT
Expected Results: CONTRACT AWARD FOR SUPPLY OF FOREST FIRE FIGHTING AIRCRAFT

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ANKARA

Market: TURKEY

Sector : MINE, METAL, MINERAL PROD & SRV

Sub-Sector: MINERALS AND MINERAL PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	4174.00 \$M	3600.00 \$M	3252.00 \$M	3050.00 \$M
Canadian Exports	52.00 \$M	48.00 \$M	70.00 \$M	80.00 \$M
Canadian Share of Market	1.20 %	1.33 %	1.84 %	2.60 %

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

Major Competing Countries

Market Share

GERMANY WEST	15.00 %
SWITZERLAND	15.00 %
BELGIUM	10.00 %
JAPAN	10.00 %
SPAIN	10.00 %
ITALY	10.00 %

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

Products/services for which there are good market prospects:

1. ALUMINIUM INGOTS
2. ASBESTOS FIBRE
3. STEEL BLOOMS, BILLETS & STABS
4. PIG IRON
5. SCRAP METAL
6. SHEETS, COILS
7. RAILS

Factors contributing to current successful Canadian exports:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ANKARA

Market: TURKEY

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Non-competitive financing
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored
- LACK ON INTEREST OF CDN SUPPLIERS
- IN TURKISH REQUIREMENTS.

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

Activity: ORGANIZATION OF A FABRICATED STEEL PRODUCTS SUPPLIER MISSION
Expected Results: INCREASED FAMILIARITY OF TURKISH BUYERS WITH CDN STEEL
INDUSTRY.

Activity: ASSIST SRVCE COS WHICH IS NECESSARY STEP/OPENING SECT. IN CDA
Expected Results: SEE BELOW.

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ANKARA

Market: TURKEY

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

OPPORTUNITIES IN PRIVATE

Approximate Value: 50 M\$

SECTOR FOR SALE MINERALS/METAL

Financing Source : DOM - Domestically funded

Contact : R. G. FARRELL, C. DZGUC

EXTOTT/RWT

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ANKARA

Market: TURKEY

Sector : MINE, METAL, MINERAL PROD & SRV

Sub-Sector: EQUIPMENT AND MACHINERY

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	220.00 \$M	210.00 \$M	205.00 \$M	170.00 \$M
Canadian Exports	0.93 \$M	0.73 \$M	0.70 \$M	0.80 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	0.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	30.00 %
UNITED KINGDOM	15.00 %
ITALY	10.00 %
JAPAN	10.00 %
GERMANY WEST	10.00 %
SWEDEN	10.00 %

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

Products/services for which there are good market prospects:

1. METALLURGICAL EQUIPMENT
2. METAL WORKING MACHINERY
3. BORING/DRILLING EQUIPMENT
4. METHANE GAS EXTRACTION EQPT.
5. COAL WASHERY EQUIPMENT

Factors contributing to current successful Canadian exports:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ANKARA

Market: TURKEY

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Non-competitive financing
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored
- FAILURE TO FOLLOW-UP ON IDENTIFIED
- OPPORTUNITIES BY CANADIAN FIRMS.

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

Activity: BIDDING SUPPORT FOR CDN FIRM PURSUING UPGRADING-LEAD PLANT
Expected Results: AWARD CONTRACT FOR PROJECT IMPLEMENTATION TO A CDN FIRM

Activity: PROMOTION OF CDN CAPABILITY IN ALUMINUM PLANT MODERNIZATION
Expected Results: AWARD OF CONTRACT TO A CANADIAN FIRM

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

Activity: PROMOTION OF CDN CAPABILITY - MODERNIZATION OF COPPER PLANT
Expected Results: CONTRACT AWARD TO CDN FIRM FOR ENGINEERING SERVICES AND PROJECT IMPLEMENTATION/MANAGEMENT

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ANKARA

Market: TURKEY

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

OPPORTUNITIES FOR SUPPLY OF	Approximate Value:	30 M\$
METALLURGICAL/METAL MACHINERY	Financing Source :	EDC - Export Dev Corporation DOM - Domestically funded
	Contact	: R. G. FARRELL, C. OZGUC EXTOTT/RWT

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ANKARA

Market: TURKEY

Sector : MINE, METAL, MINERAL PROD & SRV

Sub-Sector: MINE DEVELOPMENT SERVICES

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	2.00 \$M	2.00 \$M	2.00 \$M	10.00 \$M
Canadian Exports	0.00 \$M	0.20 \$M	0.00 \$M	0.00 \$M
Canadian Share of Market	0.00 %	10.00 %	0.00 %	0.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	15.00 %
UNITED KINGDOM	15.00 %
GERMANY WEST	15.00 %
FRANCE	15.00 %
JAPAN	15.00 %
BELGIUM	15.00 %

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

Products/services for which there are good market prospects:

1. GOLD/SILVER MINE DEVELOPMENT WORKS
2. TECHNICAL SERVICES FOR COPPER RESERVE SURVEY
3. COAL MINE DEVELOPMENT SERVICES
4. LEAD-ZINC MINE DEVELOPMENT
5. GEOLOGICAL/AERIAL MAGNETIC MAPPING

Factors contributing to current successful Canadian exports:

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

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RPTC1 TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ANKARA

Market: TURKEY

Factors for Canadian exports not reaching market potential:

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

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

Activity: COMPLETION OF TENDERING PROCESS BY CDN FIRM FOR MINE DEV'T
Expected Results: CONTRACT AWARD TO CDN FIRM FOR MINE DEVELOPMENT SERVICES

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

Activity: PROMOTION OF CDN CAPABILITY IN COPPER SURVEY PROJECT
Expected Results: AWARD OF CONTRACT TO ONE CDN FIRM

Activity: PROMOTION OF CDN CAPABILITIES IN COAL MINE DEVELOPMENT
Expected Results: INCREASE FAMILIARITY OF TURKISH COAL PRODUCING FIRMS WITH
CDN EXPERTISE

Activity: PROMOTION OF CDN EXPERIENCE/TECH RE GEO/AERIAL MAPPING
Expected Results: SECURING OF CONTRACTS FOR CDN SUPPLIERS OF MAGNETIC MAPPING
DEVICES

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ANKARA

Market: TURKEY

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

AERIAL MAPPING PROJECTS - Approximate Value: 0 M\$
GEOLOGICAL MAPPING OF MIN. RESERVES Financing Source : DOM - Domestically funded
EDC - Export Dev Corporation
Contact : R. G. FARRELL

OPPORTUNITIES FOR EXPLORATION AND MINING LICENCES Approximate Value: 5 M\$
Financing Source : DOM - Domestically funded
EDC - Export Dev Corporation
Contact : C. OZGUC, EXTOTT/RWT

RPTCL TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ANKARA

Market: TURKEY

Sector : OIL & GAS EQUIPMENT, SERVICES

Sub-Sector: MACHINERY AND EQUIPMENT

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	175.00 \$M	560.00 \$M	400.00 \$M	450.00 \$M
Canadian Exports	2.50 \$M	2.00 \$M	3.80 \$M	150.00 \$M
Canadian Share of Market	1.40 %	0.30 %	1.00 %	33.00 %

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

Major Competing Countries

Market Share

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

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

Products/services for which there are good market prospects:

1. NATURAL GAS DISTRIBUTION NETWORK EQUIPMENT
2. NATURAL GAS HEATING EQUIPMENT
3. OILFIELD EQUIPMENT
4. LNG STORAGE AND TRANSPORT SYSTEMS
5. CONVERSION KITS FOR VEHICLES
6. NATURAL GAS FILLING STATION EQUIPMENT
7. SCADA SYSTEMS FOR LNG NETWORKS

Factors contributing to current successful Canadian exports:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ANKARA

Market: TURKEY

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored

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

Activity: INCREASE OF CALLS ON POTENTIAL CLIENTS—MINIMUM ONE/MONTH
Expected Results: MORE EFFECTIVE PROMOTION OF CDN CAPABILITIES IN OIL/GAS SECTOR. INCREASE AWARENESS OF NEW OPPORTUNITIES.

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

Activity: CDN SOLO FAIR - FEB. 90, ISTANBUL.
Expected Results: BETTER EXPOSURE OF CDN FIRMS TO POTENTIAL JV PARTNERS.

Activity: NATION PETROLEUM SHOW, JUNE 89, CALGARY
Expected Results: INCREASED AWARENESS OF CDN CAPABILITIES IN OIL AND GAS SECTOR

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

Activity: SEMINAR ON TECH FOR RECOVERY OF HEAVY OIL
Expected Results: WINNING OF A CONSULTANCY CONTRACT TO ASSIST TPAO IN HEAVY OIL EXTRACTION. FOLLOW-UP EQUIPMENT CONTRACTS.

Activity: INCOMING/OUTGOING MISSION FOR NATURAL GAS APPLICATIONS TECH.
Expected Results: WINNING OF AT LEAST ONE NEW CONTRACT FOR CDN FIRM IN GAS TECH APPLICATIONS. SUB-CONTRACTS FOR CDN MANUFACTURED EQPT.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ANKARA

Market: TURKEY

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

NATURAL GAS DISTRIBUTION
SYSTEM FOR IZMIT

Approximate Value: 150 M\$
Financing Source : B.C. - Buyer Credits required
Contact : D. H. CLENDENNING TEL: 136 12 77

TURKEY-IRAN NATURAL GAS
PIPELINE

Approximate Value: 0 M\$
Financing Source : B.C. - Buyer Credits required
Contact : A. KOSETORUNU TEL: 136 12 77

OIL EXPLORATION AND RECOVERY
PROJECTS

Approximate Value: 0 M\$
Financing Source : B.C. - Buyer Credits required
Contact :

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ANKARA

Market: TURKEY

Sector : OIL & GAS EQUIPMENT, SERVICES

Sub-Sector: SERVICES INCLUDING CONSULTING

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	3.00 \$M	3.50 \$M	5.00 \$M	5.00 \$M
Canadian Exports	0.00 \$M	1.00 \$M	1.50 \$M	2.00 \$M
Canadian Share of Market	0.00 %	31.00 %	30.00 %	40.00 %

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

Major Competing Countries	Market Share
UNITED KINGDOM	30.00 %
ITALY	20.00 %
UNITED STATES OF AMERICA	10.00 %

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

Products/services for which there are good market prospects:

1. CONSULTANCY FOR PIPELINE & NATURAL GAS PROJECTS

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Non-competitive financing
- Limited appreciation/understanding of distribution system
- Performance of local agent or representative

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ANKARA

Market: TURKEY

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

Activity: CDN SOLO FAIR IN INSTANBUL, FEBRUARY 1990.
Expected Results: SECURING OF NEW JV PARTNERS FOR EXHIBITING FIRMS

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

Activity: ONE INCOMING AND ONE OUTGOING OIL AND GAS MISSION
Expected Results: INVOLVEMENT OF AT LEAST ONE CDN ENGINEERING/CONSULTING FIRM IN IRAN/TURKEY PIPELINE & IN SEVERAL NATURAL GAS CONVERSION

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

TURKEY-IRAN NATURAL GAS
PIPELINE PROJECT

Approximate Value: 2 M\$
Financing Source : B.C. - Buyer Credits required
Contact : D. H. CLENNING
TEL: 137 12 77 AKIN KOSETORUNU

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: ATHENS

Country: GREECE

OVERVIEW

THE GREEK ECONOMY CONTINUED TO IMPROVE AT A MODEST RATE IN 1987, LARGELY AS A RESULT OF THE STABILISATION PACKAGE OF OCTOBER 1985 WHICH INTRODUCED A TIGHT INCOMES POLICY AND PRICE CONTROLS. THIS POLICY WAS STILL IN EFFECT THROUGHOUT 1987 ALTHOUGH TOWARDS THE END OF THE YEAR WAGE AND PRICE CONTROLS WERE SOMEWHAT RELAXED, AND REFORMS IN THE FINANCIAL SYSTEM WERE INTRODUCED. DURING 1987 GNP FELL BY 0.5% TO ABOUT US\$48 BILLION BUT AN INCREASE OF 2.5% IS FORECASTED FOR 1988. GREECE HAS A SMALL INDUSTRIAL BASE REPRESENTING ONLY 20% OF THE GNP. THE AGRICULTURAL SECTOR REPRESENTS 17% OF THE GNP WHILE THE HEART OF THE ECONOMY REMAINS THE SERVICE SECTOR WHICH REPRESENTS OVER 56% OF THE GNP. INFLATION DECREASED SLIGHTLY TO 15% IN 1987 AND THE OUTLOOK FOR 1988 IS 13%. THIS RATE IS ABOUT 4 TIMES HIGHER THAN THE AVERAGE RATE WITHIN THE EEC AND IS ONE OF THE WORRYING FACTORS FOR THE LONG-TERM COMPETITIVENESS OF GREEK GOODS WITHIN THE EEC. UNEMPLOYMENT REMAINS STABLE AT ABOUT 7.4% WHICH IS LOWER THAN THE EC AVERAGE. FOREIGN DEBT AT THE END OF 1987 WAS ABOUT US\$19.0 BILLION AND HAS GROWN SLIGHTLY TO US\$21 BILLION FOR 1988. ABOUT THREE QUARTERS OF THE DEBTS ARE LOANS TO THE GOVERNMENT SECTOR. THE DEBT SERVICING RATIO IS 27%. FOREIGN EXCHANGE RESERVES GREW TO US\$3.2 BILLION AT THE END OF 1987 AND ARE NOW ABOUT US\$5 BILLION. THE CURRENT ACCOUNT DEFICIT HAS SLIGHTLY IMPROVED IN 1987 TO THE US\$1.25 BILLION LEVEL AND IS EXPECTED TO REMAIN AT THIS SAME LEVEL FOR 1988 - BASICALLY DUE TO INCREASED EEC RECEIPTS AND INCREASED INVISIBLE RECEIPTS. MOST OF THE INCREASE IN INVISIBLE RECEIPTS IS DUE TO TOURISM WHERE A 20% INCREASE OVER 1986 WAS REALISED WHILE THE INCREASE IN 1988 WAS ONLY 3%.

OUTLOOK

AS GREECE ENTERS A 3 TO 9 MONTH PRE-ELECTORAL PERIOD, THE OUTLOOK CONTINUES TO BE FAVOURABLE WITH MODEST IMPROVEMENTS FORESEEN FOR MOST INDICATORS. GNP IS EXPECTED TO GROW AT 2.5% WHILE THE INDUSTRIAL SECTOR OUTPUT IS EXPECTED TO INCREASE BY 6.5% AND AGRICULTURAL OUTPUT TO INCREASE BY 3%. INVESTMENT IS ALSO INCREASING.

OPPORTUNITIES

MAJOR DIFFICULTIES FOR CANADIAN EXPORTERS ARE STILL THE STRONG DUTY FREE EEC COMPETITION, REQUESTS FOR COUNTERTRADE AND OFFSETS AND OTHER NTB'S SUCH AS TENDERS IN GREEK, PAYMENT IN LOCAL CURRENCY AND BUREAUCRACY. THE VOLUME OF TRADE SHOULD INCREASE MODESTLY DUE TO GENERALLY IMPROVED ECONOMIC CONDITIONS AND NEW SPOT OPPORTUNITIES IN THE INDUSTRIAL AND DEFENCE SECTORS. THERE WILL LIKELY BE A SMALL INCREASE IN INDUSTRIAL EQUIPMENT INVESTMENTS. THE STRONG MILITARY SPENDING, ABOUT CDN.\$2.5 BILLION (14% OF BUDGET AND 7% OF GNP) REPRESENTS ALONG WITH OTHER MAJOR GOVERNMENT EXPENDITURES THE MARKETS OPPORTUNITIES. IN THE LONGER TERM (4 TO 5 YEARS) BOTH THE ENERGY AND FORESTRY SECTORS APPEAR TO OFFER POTENTIAL FOR CANADIAN PRODUCTS. MORE TRADITIONAL SECTORS SUCH AS AGRICULTURAL AND FOOD PRODUCTS (FISH, SEED POTATOES AND BEANS), CRUDE MATERIALS (SKINS AND FUR CUTTINGS) OFFER A STABLE TRADE BASE OF ABOUT

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RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: ATHENS

Country: GREECE

\$25-30 MILLION.

RPT82

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 EXPORT PROMOTION PRIORITIES

Mission: ATHENS

Country: GREECE

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

1. DEFENCE PROGRAMS, PRODUCTS, SERV
GREECE IS SPENDING APPROX. 7% OF ITS G.N.P. ON DEFENCE (ABOUT \$3 BILLION ANNUALLY) WHICH REPRESENTS A WIDE RANGE OF OPPORTUNITIES FOR CANADIAN COMPANIES. GREECE ALSO HAS SEVERAL NATO FINANCED MILITARY PROJECTS.
2. FOREST PRODUCTS, EQUIP, SERVICES
GREECE DOES NOT GROW SUFFICIENT FORESTS TO MEET ITS REQUIREMENTS FOR CONSTRUCTION GRADE TIMBER, ALSO CONSIDERABLE INTEREST HAS BEEN DEVELOPED OVER PAST FEW YEARS BY EMB IN T.F.H. WHICH SHOULD LEAD TO SALES OF PLYWOOD AND OTHER FOREST PRODUCTS AND PULP AND PAPER.
3. OIL & GAS EQUIPMENT, SERVICES
ALL THE OIL PRODUCED IN GREECE (25,000 BPD) IS BY A CANADIAN CONTROLLED CONSORTIUM. THIS SHOULD GIVE US A PREFERRED ACCESS TO THIS CO. WITH BETTER THAN AVERAGE CHANCES TO INTRODUCE CANADIAN GOODS AND SERVICES. GREECE IS ALSO INTRODUCING A BILLION DOLLAR GAS P.L. & LNG PROJECT.
4. ADVANCED TECH. PROD. & SERV
HELLENIC TELECOMMUNICATIONS ORGANIZATION PROGRAM INCLUDES THE CREATION OF A PACKET SWITCHING DATA PROCESSING AND DISTRIBUTION SYSTEM, AS WELL AS THE DEVELOPMENT OF ITS TELECOMMUNICATION SYSTEM INCLUDING RURAL, TELECOMMUNICATIONS, GOODS OPPORTUNITIES EXIST. ALSO FOR SOFTWARE.
5. TRANSPORT SYS, EQUIP, COMP, SERV.
OLYMPIC AVIATION IS EVALUATING BIDS FOR THE RENEWAL OF ITS FLEET. GOVT IS EXPECTED TO PROCEED WITH NEXT PHASE METRO (24KM). CANADA'S INTEREST IS IN A/C, ROLLING STOCK, AND EQUIPMENT SUCH AS RAILS, LOCOS AND A NEW MAJOR OVERHALL. MAINTENANCE SHOP FOR THE RAILWAYS.

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

- | | |
|------------------------------------|--------------------------------------|
| 1. CONSUMER PRODUCTS & SERVICES | 4. TRANSPORT SYS, EQUIP, COMP, SERV. |
| 2. FISHERIES, SEA PRODUCTS & SERV. | 5. FOREST PRODUCTS, EQUIP, SERVICES |
| 3. AGRI & FOOD PRODUCTS & SERVICE | |

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ATHENS

Market: GREECE

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	300.00 \$M	300.00 \$M	800.00 \$M	800.00 \$M
Canadian Exports	11.00 \$M	15.00 \$M	0.00 \$M	24.00 \$M
Canadian Share of Market	3.00 %	4.00 %	0.00 %	3.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	35.00 %
GERMANY WEST	30.00 %
FRANCE	20.00 %
UNITED KINGDOM	15.00 %
NETHERLANDS	10.00 %

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

Products/services for which there are good market prospects:

1. DASH-8-300
2. CL-215 FIRE FIGHTING
3. RADAR
4. ROCKET J-V
5. VDS - AIRCRAFT

Factors contributing to current successful Canadian exports:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ATHENS

Market: GREECE

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Unsuitable product
- Limited appreciation/understanding of distribution system
- Limited Canadian capabilities
- Performance of local agent or representative

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

Activity: ATTEMPT TO HAVE CMC SPECIFIED FOR NEW FRIGATE RADARS
Expected Results: GET RADAR COMPANY SPECIFIED BY HN AND INCLUDE IN VARIOUS PACKAGES

Activity: ATTEMPT TO HAVE 2 CDN CDS SPECIF. FOR NAVAL AIRCRAFT
Expected Results: GET ONE OF THE TWO CDN CDS SPECIFIED FOR THE NAVAL AIRCRAFT

Activity: FOLLOW UP & PROMOTE SONARS AND VDS-INDAL FOR HELICOPTER SUPP
Expected Results: GET 2 OR 3 COMPANIES SPECIFIED ON NAVAL PROJECTS

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

Activity: ARRANGE FOR DEMO DASH-8-300
Expected Results: PROVE TO OLYMPIC AVIATION, HELLENIC NAVY AND AIRFORCE THAT A/C CAN PERFORM JOB

Activity: ARRANGE FOR DEMO ROCKET FIRING
Expected Results: DEMONSTRATE SUPERIOR PERFORMANCE OF CDN ROCKET TO HAF RESULTING IN CDN \$2 MILLION SALE

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ATHENS

Market: GREECE

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: COMPUTERS, SOFTWARE & SYSTEMS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	250.00 \$M	250.00 \$M	250.00 \$M	250.00 \$M
Canadian Exports	6.00 \$M	1.00 \$M	2.50 \$M	1.00 \$M
Canadian Share of Market	2.50 %	0.40 %	1.00 %	0.40 %

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

Major Competing Countries Market Share

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

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

Products/services for which there are good market prospects:

1. COMPUTER & SOFTWARE
2. TELECOMMUNICATIONS
3. ELECTRONICS
4. INFORMATICS
5. DATA DISTR. EQUIPMENT

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Non-competitive financing
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ATHENS

Market: GREECE

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

Activity: ASSIST RURAL TELECOM & OTHER CDN COS BY ALERTING THEM ON UPC
Expected Results: OBTAIN 5% OF AWARDS IN COMMUNICATION EQUIPMENT

Activity: MONITOR DEVELOPMENT OF DATA PROCESSING SYSTEM
Expected Results: INCLUSION OF CDN COS IN SUPPLY OF DATA NETWORK PACKET SWITCHING EQUIPMENT

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

Activity: GREEK GOVT HAS RECENTLY STARTED TO INTRODUCE SATELLITE TV.
Expected Results: INCLUSION OF CDN COS IN SUPPLY OF EQUIPMENT

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

Activity: SATELLITE TV
Expected Results: INCLUSION OF CDN COS IN SUPPLY OF EQUIPMENT

Activity: DATA PROCESSING
Expected Results: INCLUSION OF CDN COS IN SUPPLY OF EQUIPMENT

Activity: INFORMATICS
Expected Results: INCLUSION OF CDN COS IN SUPPLY OF EQUIPMENT

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ATHENS

Market: GREECE

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	250.00 \$M	250.00 \$M	250.00 \$M	250.00 \$M
Canadian Exports	6.00 \$M	1.00 \$M	2.50 \$M	1.00 \$M
Canadian Share of Market	2.50 %	0.40 %	1.00 %	0.40 %

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

Major Competing Countries

Market Share

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

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

Products/services for which there are good market prospects:

1. COMPUTER & SOFTWARE
2. TELECOMMUNICATIONS
3. ELECTRONICS
4. INFORMATICS
5. DATA DISTR.EQUIPM

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Import duties are moderate
- Trade Fair activity
- Strong sectoral capability in Canada

Factors for Canadian exports not reaching market potential:

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

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ATHENS

Market: GREECE

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

Activity: ASSIST RURAL TELECOM & OTHER CDN COES BY ALERTING THEM
Expected Results: OBTAIN 5% OF AWARDS IN COMMUNICATION EQUIPMENT

Activity: MONITOR DEVELOPMENT OF DATA PROCESSING SYSTEM
Expected Results: INCLUSION OF CDN COS IN SUPPLY OF DATA NETWORK PACKET SWITCHING EQUIPMENT

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

Activity: GREEK GOVT HAS RECENTLY STARTED TO INTRO SATELLITE TV.POST
Expected Results: INCLUSION OF CDN COS IN SUPPLY OF EQUIPMENT

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ATHENS

Market: GREECE

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

SATELLITE TV

Approximate Value: 2 M\$
Financing Source : OTHER
Contact : S.MCDOWALL/J.GERAKIS COMM DIV
CDN EMB TLX:215584

DATA PROCESSING

Approximate Value: 10 M\$
Financing Source : OTHER
Contact : S.MCDOWALL/J.GERAKIS COMM DIV
CDN EMB TLX:215584

INFORMATICS

Approximate Value: 20 M\$
Financing Source : OTHER
Contact : S.MCDOWALL/J.GERAKIS COMM DIV
CDN EMB TLX:215584

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ATHENS

Market: GREECE

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: URBAN TRANSIT

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	200.00 \$M	50.00 \$M	50.00 \$M	50.00 \$M
Canadian Exports	5.00 \$M	1.00 \$M	1.00 \$M	1.00 \$M
Canadian Share of Market	2.00 %	2.00 %	2.00 %	2.00 %

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

Major Competing Countries

Market Share

UNITED KINGDOM	20.00 %
FRANCE	20.00 %
GERMANY WEST	20.00 %
COMECON	20.00 %
UNITED STATES OF AMERICA	20.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. RR MAJOR OVERHAUL REPAIR SHOP
2. SYST.EQUIPMENT
3. LDCOS
4. RAILS

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ATHENS

Market: GREECE

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

Activity: ASSIST CDN SUB SUPPL TO GET THEIR EQPT INCL IN 1 OF THE PREQ
Expected Results: TO GET AT LEAST ONE CDN CO INTO A CONSORTIUM

Activity: GET A CDN MFGRS TO BID ON TENDER FOR 15 LOCOS WORTH \$30 MIL.
Expected Results: 20% CHANCE OF \$30 MILLION ORDER

Activity: GET CDN CO TO BID ON TENDER FOR RAILS
Expected Results: 10% CHANCE OF \$20 MILLION ORDER

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

Activity: ASSIST CDN CO WHO IS PURSUING MAJOR OVERHAUL RR REPAIR SHOP
Expected Results: GET CDN CO ON SHORT LIST

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ATHENS

Market: GREECE

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

RAIL ELECTRIFICATION PROJECT Approximate Value: 100 M\$
 Financing Source : OTHER
 Contact : S.MCDDOWALL/J.GERAKIS COMM DIV
 CDN EMB TLX:215584

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ATHENS

Market: GREECE

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: AEROSPACE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	600.00 \$M	400.00 \$M	200.00 \$M	200.00 \$M
Canadian Exports	30.00 \$M	5.00 \$M	2.00 \$M	2.00 \$M
Canadian Share of Market	5.00 %	1.00 %	1.00 %	1.00 %

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

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

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

Products/services for which there are good market prospects:

1. DHC'S DASH-8-300
2. CANADAIR'S CHALLENGER
3. CL-215

Factors contributing to current successful Canadian exports:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ATHENS

Market: GREECE

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

Activity: FOLLOW ON EVALUATION PROCED TO ASSIST DHC TO BE SPECIFIED
Expected Results: 5% CHANCE OF WINNING BID FOR \$150 MILLION

Activity: FOLLOW UP ON GOVT INTENTIONS TO PURCH VIP A/C TO ENSURE THAT
Expected Results: OBTAIN RFQ SUBMISSION OF OFFER

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

Activity: ARRANGE FOR DEMO OF THE DASH-8-300 A/C TO GREEK OFFICIALS
Expected Results: INCREASED AWARENESS OF THE AIRCRAFT'S CAPABILITIES

Activity: ARRANGE FOR NEW DEMO OF THE CHALLENGER A/C TO GREEK OFFICIALS
Expected Results: INCREASED AWARENESS OF THE AIRCRAFT'S CAPABILITIES

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ATHENS

Market: GREECE

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

OLYMPIC AVIATION FLEET RENEWAL Approximate Value: 135 M\$
 Financing Source : EDC - Export Dev Corporation
 Contact : S.MCDOWALL/J.GERAKIS COMM.DIV.
 CDN EMB TLX:215584

HAF VIP PLANE 1 TO 5 Approximate Value: 75 M\$
 Financing Source : EDC - Export Dev Corporation
 Contact : S.MCDOWALL/J.GERAKIS COMM DIV
 CDN EMB TLX:215584

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ATHENS

Market: GREECE

Sector : FOREST PRODUCTS, EQUIP, SERVICES

Sub-Sector: WOOD AND WOOD PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	180.00 \$M	179.00 \$M	160.00 \$M	160.00 \$M
Canadian Exports	1.60 \$M	1.40 \$M	1.20 \$M	1.00 \$M
Canadian Share of Market	0.90 %	0.80 %	0.80 %	0.60 %

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

Major Competing Countries

Market Share

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

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. LUMBER
2. PLYWOOD
3. TIMBER FRAME HOUSING TECHNIQUE
4. PULP AND PAPER

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Import duties are low
- Aggressive marketing
- Provincial export promotion
- Competitive pricing
- Strong sectoral capability in Canada

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ATHENS

Market: GREECE

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

Activity: FOLLOW UP ON TIMBER FRAME CONSTR SEM & GET LOC DEV TO BUILD
Expected Results: PUBLISH IN GREEK OF TFC TECHNIQUES & DESIGN SPECS AS REQUESTED BY LOCAL ARCHITECTS & ADAPTED TO GREEK NEEDS.

Activity: CONT DISTRIB OF TIMBER FRAME CONSTR MANUAL TO ENG/ARCH/INSTI
Expected Results: GREATER AWARENESS OF CANADIAN TIMBER FRAME HOUSING METHODS \$1 ML SALES IN NEXT 3 YEARS

Activity: ESTABLISH CONSIGNMENT PLYWOOD STOCKS IN PIRAEUS
Expected Results: ESTABLISH INITIAL SALES

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

Activity: FOLLOW UP ON DISC W/LEADING GREEK LUMB/PLYWOOD IMPORTERS.
Expected Results: NEW BUYERS IDENTIFICATION START CANADIAN LUMBER/PLYWOOD SALES

Activity: MAKE CONTACT WITH MAJOR PULP AND PAPER BUYERS
Expected Results: ESTABLISH 2 OR 3 BUYING CONNECTIONS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ATHENS

Market: GREECE

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

FIND SUPPLIERS OF CONSTRUCTION DIMENSION LUMBER AND PLYWOOD	Approximate Value:	5 M\$
	Financing Source :	
	Contact	: C.DIAMANTOPOULOS, COMM.,DIV. CDN EMB TLX:215584
FINE SUPPLIERS OF PULP & PAPER ESP.KRAFT & NEWSPRINT & PULP	Approximate Value:	5 M\$
	Financing Source :	
	Contact	: C.DIAMANTOPOULOS, COMM.,DIV. CDN EMB.,TLX:215584

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ATHENS

Market: GREECE

Sector : OIL & GAS EQUIPMENT, SERVICES

Sub-Sector: MACHINERY AND EQUIPMENT

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	50.00 \$M	50.00 \$M	50.00 \$M	50.00 \$M
Canadian Exports	2.50 \$M	0.00 \$M	0.00 \$M	0.00 \$M
Canadian Share of Market	5.00 %	0.00 %	0.00 %	0.00 %

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

Major Competing Countries

Market Share

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

Products/services for which there are good market prospects:

1. PROJECT MANAGEMENT FOR P.L. CONSTRUCTION
2. CNG TECHNOLOGY EQUIPMENT
3. OIL & GAS EXPLORATION EQUIPMENT

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ATHENS

Market: GREECE

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

Activity: ASSIST OTHER CDN COS TO PARTICIPATE IN CONSTR.OF GAS P.L.
Expected Results: INCLUSION OF CDN COS IN REPS TO BE ISSUED

Activity: INTRODUCE CDN CNG TECHNOLOGY TO COMBAT POLLUTION PROBLEMS
Expected Results: INTRODUCE COS TO GREECE

Activity: ASSIST CDN COS TO BE REGISTERED WITH NAPC
Expected Results: GET 10% OF BUSINESS OF O&G CONSUMABLES AND NEW EXPLORATION WORK.

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

Activity: NATL GAS TRANSPORTATION AND DISTRIBUTION NETWORK
Expected Results: PARTICIPATION OF CDN COS IN CONSTRUCTION AND MANAGEMENT

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ATHENS

Market: GREECE

Sector : OIL & GAS EQUIPMENT, SERVICES

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	50.00 \$M	50.00 \$M	50.00 \$M	50.00 \$M
Canadian Exports	2.50 \$M	0.00 \$M	0.00 \$M	0.00 \$M
Canadian Share of Market	5.00 %	0.00 %	0.00 %	0.00 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	5.00 %
UNITED KINGDOM	10.00 %
FRANCE	10.00 %
ITALY	5.00 %
UNION OF SOVIET SOC REP	5.00 %
GERMANY WEST	20.00 %

Products/services for which there are good market prospects:

1. PROJECT MANAGEMENT FOR P.L.CONSTR.
2. CNG TECHNOLOGY & EQUIPMENT
3. OIL & GAS EXPLORATION EQUIPMENT

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Import duties are moderate

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ATHENS

Market: GREECE

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

Activity: ASSIST OTHER CDN COS TO PART IN CONSTR OF GAS P.L. & MANAG.
Expected Results: INCLUSION OF CDN COS IN REPS TO BE ISSUED

Activity: INTRODUCE CDN CNG TECHNOLOGY TO COMBAT POLLUTION PROBLEMS
Expected Results: INTRODUCE COS TO GREECE

Activity: ASSIST CDN COS TO BE REGISTERED WITH NAPC
Expected Results: GET 10% OF BUSINESS OF O&G CONSUMABLES AND NEW EXPLORATION WORK

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

Activity: NATL GAS TRANSPORTATION AND DISTRIBUTION NETWORK
Expected Results: PARTICIPATION OF CDN COS IN CONSTRUCTION AND MANAGEMENT

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RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: ATHENS

Country: GREECE

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

	Total (\$ Million)	Canadian Share	Major Competitor Share
Current year	300.00	1.00	90.00
One year ago	200.00	1.00	90.00
Two years ago	200.00	1.00	90.00

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

\$5 MILLION

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

- E.C. - W.GERMANY - ITALY - FRANCE - U.K.
- U.S.A.

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

- VERY LITTLE OFFICIALLY AS GREECE HAS EXCHANGE CONTROL ALTHOUGH THIS IS LOOSENING UP FOR EC COUNTRIES. HOWEVER MANY GREEKS DO HAVE CAPITAL OUTSIDE THE COUNTRY AND THIS WILL BE A TARGET CLIENTELE

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RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: ATHENS

Country: GREECE

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

- F.T.A.
- GOOD IMAGE

the following constraints:

- FAR AWAY
- NOT WELL KNOWN
- F.T.A.

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

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

The mission believes that the following sectors are of greatest interest to investors in its territory/country with an assigned ranking of 1-10:

Sector	Ranking
Agriculture/Food/Fish	1
Consumer Products	1
Commercial Service	1

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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: ATHENS

Country: GREECE

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

Date

Type: OUTCALL PROGRAM

MEVGAL YOGURT PLANT

0/00

Location: GREECE

Invest Nature: EQUITY

GREENFIELD

Sector: MULTIPLE SECTORS

Cooperants: GENERAL

Estimated Budget: \$0.00

Total estimated budget for all proposals:

\$0.00

Post : ATHENS

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Post/Contact</u>
89/04/00	BUYERS MISSION FROM GREECE TO AUTO SHOW CDA/MONTREAL MISSION IN, TO FAIR	TRANSPORT SYS,EQUIP,COMP,SERV.
89/05/06	INDEX G. GARAGE EQUIPMENT SHOW PIRAEUS, GREECE INFO BOOTH, ONLY	TRANSPORT SYS,EQUIP,COMP,SERV. S.WATERFALL/D.ADAMS

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: BERNE

Country: SWITZERLAND

THE CANADA-SWISS TRADE AND ECONOMIC RELATIONSHIP CONTINUED TO EXPAND IN 1987 (JUST UNDER \$1 BILLION TRADE) AND EXCEEDED 1987 RECORDS IN 1988 (\$1.3 BILLION). CANADIAN EXPORTS TO SWITZERLAND GREW BY 20% TO CDN \$400 MILLION. SWISS EXPORTS TO CANADA GREW ABOUT 10% TO CDN \$590 MILLION. 1988 RESULTS SHOW CONTINUED STRONG GROWTH OF CANADIAN EXPORTS TO SWITZERLAND AND MINIMAL GROWTH IN SWISS EXPORTS TO CANADA. INVESTMENT CONTINUES TO BE A SIGNIFICANT FACTOR. SWITZERLAND IS CLOSE BEHIND FRANCE AS THE 7TH LARGEST INVESTOR IN CANADA AND CANADA RANKS 6TH AS AN INVESTOR IN SWITZERLAND. 1987 SAW MEANINGFUL EXPANSION OF INVESTMENTS IN CANADA BY OERLIKON BUEHRLE AND SANDOZ (\$30 MILLION) AND A GENERALLY HIGHER LEVEL OF AWARENESS. CANADIAN BORROWING ON THE SWISS CAPITAL MARKET HELD IN THE \$3-4 BILLION ANNUALLY RANGE WHILE THE NUMBER OF MAJOR CANADIAN FIRMS MAKING PROMOTIONAL PRESENTATIONS TO EQUITY INVESTORS CLIMBED STEEPLY. SWISS TOURISM VISITS TO CANADA INCREASED BY OVER 15% TO 70,000 IN 1987. THERE ARE NO MAJOR IRRITANTS IN THE ECONOMIC RELATIONS BETWEEN OUR COUNTRIES. WE CONTINUE TO SEEK MODIFICATION OF RESTRICTIONS IMPOSED BY SWISS AGRICULTURAL POLICY AND THE SWISS LOBBY FOR BANKING RECIPROCITY. SWITZERLAND, WITH 6.5 MILLION POPULATION AND ONLY 41,000 SQUARE KILDMETERS EXERTS A FINANCIAL AND ECONOMIC INFLUENCE FAR BEYOND ITS SIZE. THE SWISS ENJOY THE HIGHEST STANDARD OF LIVING AMONG OECD MEMBERS (ABOUT 20% ABOVE WEST GERMANY), STRIKE FREE LABOUR-MANAGEMENT RELATIONS, A GOVERNMENT BUDGET IN THE BLACK, VIRTUALLY NO UNEMPLOYMENT (0.8%), STABLE PRICES (CPI INCREASE OF 2%), A BOP SURPLUS AND ONE OF THE WORLD'S STRONGEST CURRENCIES. SWISS DIRECT INVESTMENTS ABROAD WERE ABOUT 55 BILLION SWISS FRANCS (29 BILLION US\$) BY THE END OF 1986. THE ECONOMIC OUTLOOK FOR SWITZERLAND IS "STEADY AS SHE GOES!". AVERAGE ANNUAL INCREASE IN GDP WAS 2.0% FOR 1987 AND IS FORECAST AT THE SAME LEVEL FOR 1988, WITH A SLIGHT SLOWDOWN IN 1989. THE MAJOR IMPEDIMENT TO ECONOMIC GROWTH APPEARS TO BE THE TIGHT LABOUR MARKET WHICH IS REFLECTED IN SHORTAGES OF PERSONNEL IN A WIDE RANGE OF JOBS. MONETARY POLICY REMAINS TIGHT WITH A 3% GROWTH TARGET IN THE MONEY SUPPLY FOR THE YEAR. IN THE LONGER TERM THE SWISS WILL HAVE TO DEAL WITH THE AREA OF ENERGY SOURCES IN ORDER TO GUARANTEE FUTURE SUPPLIES. AS PREDICTED THE GROWTH OF THE EXPORT SECTOR SLOWED IN 1987 BUT CONTINUED LOCAL CONSUMER DEMAND AND BUOYANT BUILDING INDUSTRY MAINTAINED THE ECONOMIC GROWTH. INDUSTRIAL PRODUCTION, WHICH HAD FALLEN SLIGHTLY (1%) IN 1987, ROSE STRONGLY IN THE FIRST QUARTER OF 1988 (6% ABOVE THE EQUIVALENT LEVEL IN 1987). THE RESURGENCE OF THE US DOLLAR (SW.FR. 1.34 IN JANUARY AND OVER SW.FR. 1.50 IN JULY) HAS CONTRIBUTED TO THE HEALTHY BUSINESS ENVIRONMENT. ECONOMICALLY, AS WELL AS POLITICALLY, SWITZERLAND IS PRIMARILY CONCERNED WITH THE EC MOVEMENT TOWARD A COMMON INTEGRATED MARKET IN 1992. LIKE OTHER EFTA COUNTRIES, SWITZERLAND HAS HAD A FREE TRADE AGREEMENT WITH THE EC SINCE 1972. PRESENT POLICY IS TO ACHIEVE AS CLOSE A HARMONIZATION AS POSSIBLE WITH THE EC WITHOUT ACTUAL MEMBERSHIP. THE MORE THAN 100 AGREEMENTS MADE BY SWITZERLAND WITH THE EC (A GREATER NUMBER BY FAR THAN ANY OTHER EFTA COUNTRY) ARE STRONG ARGUMENT

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: BERNE

Country: SWITZERLAND

THAT SWITZERLAND'S RELATIONSHIP WITH BRUSSELS IS CLOSER THAN THAT OF SOME EC MEMBER COUNTRIES. SWISS INDUSTRY IS WELL AWARE THAT DESPITE THESE MAMMOTH EFFORTS IT IS GOING TO BE EASIER TO DO BUSINESS FROM WITHIN THE COMMUNITY THAN FROM OUTSIDE. CONSEQUENTLY THE SWISS HAVE INVESTED INVESTMENTS IN GERMANY AT THE END OF 1986 WAS ALMOST 14 BILLION DM. AT THE SAME TIME GERMANY HAD ONLY INVESTED 10 BILLION DM. AT THE SAME TIME GERMANY HAD ONLY INVESTED 10 BILLION DM IN SWITZERLAND (EVEN THOUGH GERMAN POPULATION IS OVER 60 MILLION). THE CAUTIOUS SWISS ARE WELL WORTH EMULATING IN THEIR TWO PRONG APPROACH TO 1992.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 EXPORT PROMOTION PRIORITIES

Mission: BERNE

Country: SWITZERLAND

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

1. ADVANCED TECH. PROD. & SERV
STRONG GROWTH SECTOR. SPECIALIZED BUT MODEST DOMESTIC MANUFACTURING BASE. INTEREST (EXHIBITED) IN NORTH AMERICAN TECHNOLOGY.
2. CONSUMER PRODUCTS & SERVICES
SWISS ENJOY HIGHEST PER CAPITA INCOME IN OECD. STABLE CURRENCY; STRONG PURCHASING POWER; SUPERB TEST MARKET FOR WESTERN EUROPE. ATTRACTIVE MARKET FOR QUALITY PRODUCTS.
3. FOREST PRODUCTS, EQUIP, SERVICES
SWISS CONTINUE TO LOOK FOR DIVERSIFIED SOURCES OF SUPPLY (COMPETITIVE) CANADIAN DOLLAR EXCHANGE RATE ATTRACTIVE.
4. FISHERIES, SEA PRODUCTS & SERV.
AS WITH CONSUMER PRODUCTS HIGH STANDARD OF LIVING HAS OPENED MARKET TO LUXURY ITEMS LIKE SALMON AND LOBSTER. NEW VARIETIES BEING SOUGHT. STRONG DISTRIBUTION CHANNELS.

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

1. MINE, METAL, MINERAL PROD & SRV
2. CONSUMER PRODUCTS & SERVICES
3. FOREST PRODUCTS, EQUIP, SERVICES
4. TRANSPORT SYS, EQUIP, COMP, SERV.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BERNE

Market: SWITZERLAND

Sector : FISHERIES, SEA PRODUCTS & SERV.

Sub-Sector: FISH & SHELLFISH & OTHER PROD .

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	214.30 \$M	238.50 \$M	241.00 \$M	250.00 \$M
Canadian Exports	14.10 \$M	22.30 \$M	28.00 \$M	33.00 \$M
Canadian Share of Market	6.60 %	9.30 %	11.60 %	13.20 %

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

Major Competing Countries	Market Share
DENMARK	25.00 %
FRANCE	16.00 %
NETHERLANDS	11.00 %

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

Products/services for which there are good market prospects:

1. YELLOW PERCH FILLETS (FRESH, FROZEN)
2. SALMON (FROZEN)
3. SHRIMPS, FRESH & FROZEN
4. LIVE LOBSTER
5. COD FILLETS

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Fairs and Missions support
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- IMPORTS ARE DUTY FREE

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- LABELLING FOR PACKAGES REQUIRED IN
- 3 LANGUAGES

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BERNE

Market: SWITZERLAND

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

Activity: SURVEY - 20 LARGEST FISH & SEAFOOD IMPORTERS
Expected Results: PREPARE ANALYSIS FOR DISTRIBUTION TO CDN SUPPLIERS

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

Activity: IGEHO, BASEL, 23-29 NOV. 89, INFO BOOTH
Expected Results: MAKE CONTACT WITH 50 IMPORTERS

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

Activity: 2ND SURVEY-NEXT 20 LARGEST FISH & SEAFOOD IMPORTERS
Expected Results: PREPARE ANALYSIS FOR DISTRIBUTION TO CDN SUPPLIERS.

Activity: COORDINATE 2 RESTAURANT PROMOTIONS WITH IMPORTERS
Expected Results: PROVIDE SUPPORT TO CONSUMERS FOR CDN PRODUCT RECOGNITION

Activity: REPORT-SWISS MARKET FOR FISH & SEAFOOD PRODUCTS
Expected Results: BRING SWISS REQUIREMENTS TO ATTENTION OF CDN EXPORTERS AND PRODUCERS

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BERNE

Market: SWITZERLAND

Sector : FISHERIES, SEA PRODUCTS & SERV.

Sub-Sector: PROCESSED FISH & SHELLFISH

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	114.50 \$M	166.00 \$M	160.00 \$M	175.00 \$M
Canadian Exports	4.80 \$M	8.20 \$M	9.50 \$M	12.50 \$M
Canadian Share of Market	4.20 %	5.00 %	6.00 %	7.00 %

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

Major Competing Countries Market Share

DENMARK	27.20 %
NORWAY	12.60 %
SPAIN	10.30 %

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

Products/services for which there are good market prospects:

1. SHRIMPS (CANNED)
2. SALMON (SMOKED, CANNED)
3. BREADED SEAFISH

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Fairs and Missions support
- Competitive pricing
- Strong sectoral capability in Canada
- STRONG SUPPORT FROM SWISS
- AGENTS, - IMPORTS ARE DUT
- FREE

Factors for Canadian exports not reaching market potential:

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

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BERNE

Market: SWITZERLAND

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

Activity: SURVEY-20 LARGEST FISH & SEAFOOD IMPORTERS
Expected Results: PREPARE ANALYSIS FOR DISTRIBUTION TO CDN SUPPLIERS

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

Activity: IGEHO, BASEL, 23-29 NOV. 89, INFO BOOTH
Expected Results: MAKE CONTACT WITH 50 IMPORTERS

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

Activity: 2ND SURVEY-NEXT 20 LARGEST FISH & SEAFOOD IMPORTERS
Expected Results: PREPARE ANALYSIS FOR DISTRIBUTION TO CDN SUPPLIERS

Activity: COORDINATE 2 RESTRAURANT PROMOTIONS WITH IMPORTERS
Expected Results: PROVIDE SUPPORT TO CONSUMERS FOR CDN PRODUCT RECOGNITION

Activity: REPORT-ON SWISS MARKET FOR FISH & SEAFOOD PRODUCTS
Expected Results: BRING SWISS REQUIREMENTS TO ATTENTION OF CDN EXPORTERS AND PRODUCERS

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BERNE

Market: SWITZERLAND

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	60.00 \$M	80.00 \$M	100.00 \$M	100.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.00 \$M	0.00 \$M
Canadian Share of Market	1.00 %	1.00 %	1.00 %	1.00 %

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

Major Competing Countries Market Share

UNITED STATES OF AMERICA	70.00 %
GERMANY WEST	15.00 %
AUSTRIA	5.00 %

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

Products/services for which there are good market prospects:

1. N B C MATERIAL
2. F-18 FIGHTER & EQUIPMENT
3. MISSILES
4. SYNTHETIC APERTURE CARDS
5. AIRCRAFT MTC & PARTS
6. AMMUNITION

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- Competitive pricing

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Limited Canadian capabilities
- LOCAL PURCHASE REQUIREMENTS
- MUST BE WILL TO MFG UNDER LICENCE
- IN CH/JOINT VENTURE

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BERNE

Market: SWITZERLAND

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

Activity: PURCHASE OF CHEMICAL LITMUS PAPER DELAYED IN 1988.
Expected Results: PURCHASE ORDER IN 1990 OF \$2M. (APPROX)

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

Activity: FOLLOW F-18 OFFSET NEGOTIATIONS FOR CDN OPPORTUNITIES/PROB.
Expected Results: KEEP OTTAWA INFORMED OF PROGRESS

Activity: ANNUAL REPORT ON SWISS DEFENCE PROCUREMENT
Expected Results: REPORT IN SEPT/OCT 89 FOR 1990

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BERNE

Market: SWITZERLAND

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: TELECOM, DATACOM, SAT, SPACECOM

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1075.00 \$M	1372.00 \$M	1533.00 \$M	1620.00 \$M
Canadian Exports	5.00 \$M	5.00 \$M	13.00 \$M	14.00 \$M
Canadian Share of Market	0.50 %	0.40 %	0.80 %	0.90 %

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

Major Competing Countries Market Share

GERMANY WEST	33.00 %
SWEDEN	15.00 %
UNITED STATES OF AMERICA	5.00 %
UNITED KINGDOM	4.70 %

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

Products/services for which there are good market prospects:

1. INDUSTRIAL CATV EQUIPMENT
2. HOME TV DISHES/CONVERTERS
3. HOME TELEPHONE SETS
4. FIBRE OPTIC COMMUNICATION PRODUCTS
5. MULTI-CHANNEL MICROWAVE DISTRIBUTION SYSTEMS MMDS
6. SL-1 SOFTWARE FOR DIGITAL SWITCHING EQUIPMENT
7. CENTRALIZED CONTRBL & MAINTENANCE OF PBX EQUIPMENT
8. ON LINE MGMT SYSTEM & GRAPHICS FOR TELECOM NETWORK
9. INDUSTRIAL TELEVISION PRODUCTS

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BERNE

Market: SWITZERLAND

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Trade Fair activity
- Provincial export promotion
- Competitive pricing
- Strong sectoral capability in Canada
- Willingness of exporters to invest/joint venture in territory
- GOOD RELATIONSHIP WITH
- ESTABLISHED SWISS AGENTS
- -GOOD CONTACTS WITH PTT

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Non-competitive pricing
- Lack of promotion and advertising
- PTT APPROVAL REQU'
- FOR EQUIPMENT
- PTT SUPPORTS LOCAL MANU. 1ST WHO
- CAN ALSO BE REPS FOR FOREIGN PROD.

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

Activity: MONITOR DEV'T OF THE MARKET FOR HOME TV DISHES/CONVERTERS
Expected Results: INCREASE BY 2 THE NUMBER OF CDN COMPANIES REPRESENTED IN SWITZERLAND

Activity: MONITOR THE IMPLEMENTATION OF NEW TELECOM. LAW
Expected Results: I.D. MARKET OPENINGS AND OPPORTUNITIES BROUGHT BY LEGAL CHANGES & DEREGULATIONS

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BERNE

Market: SWITZERLAND

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

Activity: INTERNATIONAL "MONTREUX TV SYMPOSIUM 89" NATIONAL STAND
Expected Results: TARGET SIGNING OF 10 DISTRIBUTORSHIP AGREEMENT

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

Activity: MONITOR DEV'T IN THE USE OF SATELLITE CHANNELS
Expected Results: I.D. OPPORTUNITIES FOR CDA

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

SWISSNET (ISDN FIBRE OPTIC NETWORK)	Approximate Value: 2000 M\$
	Financing Source : OTHER
	Contact : CDN EMBASSY

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BERNE

Market: SWITZERLAND

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: COMPUTERS HARD/SOFTWARE & COMP

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	2881.00 \$M	3120.00 \$M	3350.00 \$M	3750.00 \$M
Canadian Exports	8.50 \$M	6.90 \$M	4.50 \$M	5.50 \$M
Canadian Share of Market	0.29 %	0.22 %	0.13 %	0.14 %

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

Major Competing Countries	Market Share
GERMANY WEST	35.00 %
UNITED STATES OF AMERICA	14.00 %
UNITED KINGDOM	11.00 %
FRANCE	7.00 %
JAPAN	6.00 %
NETHERLANDS	6.00 %

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

Products/services for which there are good market prospects:

1. COMPUTER PRODUCTS
2. COMPONENTS
3. PORTABLE COMPUTERS
4. WORD PROCESSING EQUIPMENT
5. LOCAL AREA NETWORK
6. SOFTWARE FOR OFFICE AUTOMATION
7. DATA PROCESSING EQUIPMENT
8. EDUCATIONAL SOFTWARE IN FRENCH
9. SOFTWARE & HARDWARE FOR EXPERT SYSTEMS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BERNE

Market: SWITZERLAND

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Market prospects have not been adequately explored
- IMPORTS FROM EEC AND EFTA COUNTRIES
- ARE DUTY FREE

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

Activity: TARGETED MARKETING; MAIL-OUT AND QUESTIONNAIRES
Expected Results: TO MEASURE INTEREST IN CONSIDERING CDN SUPPLIERS; IDENTIFY 10 HIGH VOLUME BUYERS

Activity: DEV DATA-BASE & COMPANY PROFILE SYSTEM-SWI COMPUTER SECTOR
Expected Results: TO SUPPLY CDN EXPORTERS WITH MORE INFO AND TO PREPARE MATERIAL FOR WIN PROGR.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BERNE

Market: SWITZERLAND

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

Activity: INFORMATIC MISSION, FEB. 89 (EXTOTT/RWT, RWTF)
Expected Results: INCREASE CDN EXPORTS BY SIGNING DISTRIBUTORSHIP & AGENT AGREEMENTS (TARGET 4)

Activity: INELTEC 89, BASEL, SEPT. 5-8, 1989, INFO BOOTH
Expected Results: HAVE 5 CDN COMPANIES PARTICIPATE

Activity: SEMICON EUROPE, ZURICH OERLIKON, FEB '90, INFO BOOTH
Expected Results: MEET 40 POTENTIAL AGENTS FOR CDN COMPANIES CONSIDERATION

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

Activity: INFO BOOTH AT SWISS COMPUTER FAIR IN GERMAN SPEAKING SECTOR
Expected Results: INCREASE AWARENESS OF CDN PRESENCE ON SWISS MARKET (TARGET 25 DISTRIBUTORS)

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BERNE

Market: SWITZERLAND

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	6850.00 \$M	7600.00 \$M	8000.00 \$M	8000.00 \$M
Canadian Exports	18.00 \$M	9.20 \$M	10.00 \$M	25.00 \$M
Canadian Share of Market	0.01 %	0.01 %	0.01 %	0.01 %

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

Major Competing Countries Market Share

GERMANY WEST	45.00 %
JAPAN	16.00 %
FRANCE	11.00 %
ITALY	8.00 %
UNITED STATES OF AMERICA	8.00 %
BELGIUM	4.00 %

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

Products/services for which there are good market prospects:

1. EXECUTIVE JET
2. AIRCRAFT ENGINES & PARTS
3. AUTOMOTIVE PARTS

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- Competitive pricing

Factors for Canadian exports not reaching market potential:

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

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BERNE

Market: SWITZERLAND

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

Activity: . ASSISTANCE IN CONTACTS WITH FED. GOV. RE EXECUTIVE JET
Expected Results: CONTRACT DECISION 1989 \$15-20 M

Activity: ASSESSMENT OF AUTOMOTIVE MARKET
Expected Results: REPORT TO OTTAWA

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BERNE

Market: SWITZERLAND

Sector : FOREST PRODUCTS,EQUIP,SERVICES

Sub-Sector: WOOD AND WOOD PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	854.70 \$M	1.00 \$M	1.20 \$M	1.40 \$M
Canadian Exports	11.50 \$M	15.30 \$M	19.50 \$M	22.80 \$M
Canadian Share of Market	1.30 %	1.50 %	1.60 %	1.60 %

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

Major Competing Countries . Market Share

GERMANY WEST	37.50 %
AUSTRIA	22.00 %
FRANCE	11.50 %
ITALY	7.40 %
FINLAND	4.40 %
SWEDEN	3.20 %

Products/services for which there are good market prospects:

1. LUMBER SOFTWOOD

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BERNE

Market: SWITZERLAND

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

Activity: MARKET STUDY-PART OF STUDY DESCR. IN PULP/PAPER SUB-SECTOR
Expected Results: STUDY RESULTS SHOULD PROVIDE GUIDE TO CDN INDUSTRY, ON WHEN TO ENTER MARKET AND WHO TO DEAL WITH

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BERNE

Market: SWITZERLAND

Sector : FOREST PRODUCTS,EQUIP,SERVICES

Sub-Sector: PULP AND PAPER PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	256.80 \$M	1.69 \$M	1.89 \$M	2.10 \$M
Canadian Exports	34.70 \$M	39.50 \$M	46.50 \$M	52.90 \$M
Canadian Share of Market	1.35 %	2.30 %	2.50 %	2.60 %

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

Major Competing Countries Market Share

GERMANY WEST	33.60 %
SWEDEN	14.90 %
FINLAND	11.10 %
AUSTRIA	10.60 %
FRANCE	6.20 %
BELGIUM	3.40 %

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

Products/services for which there are good market prospects:

1. WOOD PULP & SIMILAR PULP
2. PAPERBOARD

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Import duties are high
- Non-competitive pricing
- MARKET VARIES WITH EXCHANGE RATE &
- SUPPLY FROM SCANDINAVIA, EFTA PREF.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BERNE

Market: SWITZERLAND

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

Activity: MARKET STUDY OF PULP & PAPER TO DETERMINE KEY LEVELS \$ # ETC
Expected Results: STUDY RESULTS SHOULD PROVIDE GUIDE TO CDN INDUSTRY, ON WHEN TO ENTER THE MARKET AND WHO TO DEAL WITH

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BERNE

Market: SWITZERLAND

Sector : MINE, METAL, MINERAL PROD & SRV

Sub-Sector: MINERALS AND MINERAL PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1438.00 \$M	1337.00 \$M	1360.00 \$M	1400.00 \$M
Canadian Exports	1.50 \$M	2.20 \$M	2.80 \$M	3.20 \$M
Canadian Share of Market	0.10 %	0.16 %	0.20 %	0.22 %

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

Major Competing Countries Market Share

GERMANY WEST	44.40 %
FRANCE	8.80 %
ITALY	6.80 %
BELGIUM	5.30 %
NETHERLANDS	5.30 %

Products/services for which there are good market prospects:

1. GOLD
2. PLATINUM

Factors contributing to current successful Canadian exports:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BERNE

Market: SWITZERLAND

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

Activity: REPORT -COMPREHENSIVE STATISTICAL DATA
Expected Results: DISTRIBUTION TO CDN SUPPLIERS. BETTER KNOWLEDGE OF MARKET & DISTRIBUTION CHANNELS.

Activity: ASSIST CDA MINT IN REPRESENTATION TO SWISS GOVERNMENT
Expected Results: RECLASSIFICATION OF PLATIUM CDIN

Activity: PROMOTION OF GOLD SECTOR WITH INSTITUTIONAL MARKET
Expected Results: CONTINUED SALE OF NON-MONETARY GOLD

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BERNE

Market: SWITZERLAND

Sector : CONSUMER PRODUCTS & SERVICES

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

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	174.10 \$M	213.90 \$M	218.40 \$M	225.70 \$M
Canadian Exports	29.70 \$M	52.10 \$M	55.80 \$M	60.00 \$M
Canadian Share of Market	17.10 %	24.40 %	25.50 %	26.60 %

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

Major Competing Countries	Market Share
GERMANY WEST	22.40 %
ITALY	42.80 %
GREECE	8.50 %
UNITED STATES OF AMERICA	8.30 %
FRANCE	6.80 %
DENMARK	5.00 %

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

Products/services for which there are good market prospects:

1. FUR GARMENTS
2. FUR SKINS

Factors contributing to current successful Canadian exports:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BERNE

Market: SWITZERLAND

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

Activity: REPORT-MARKET FOR FUR GOODS TO DISTRIBUTE TO CDN EXPORTER
Expected Results: INCREASE AWARENESS OF MARKETING POSSIBILITIES FOR CDN FUR GOODS

Activity: MAILING OF FUR GUIDE TO SWISS FURRIERS
Expected Results: MAIL REPORT TO 100 CDN FURRIERS. BETTER KNOWLEDGE OF CDN CAPABILITY IN FUR SECTOR (DISTRIBUTE TO 250 BUYERS)

Activity: RECRUITING OF BUYERS FOR 1989 IFF
Expected Results: RECRUIT 3 NEW BUYERS FOR IFF

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

Activity: IFF 1989
Expected Results: PURCHASE OF \$2M BY SWISS BUYERS ON SITE

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

Activity: RECRUITING OF SWISS BUYERS TO IFF MTL 1990/91
Expected Results: RECRUIT 3 NEW BUYERS

Activity: CALLS ON THE FUR TRADE ASSOCIATION AND 20 FURRIERS
Expected Results: PREPARATION OF ANALYSE OF PRODUCT NEEDS FOR CDN EXPORTERS

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BERNE

Market: SWITZERLAND

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: LEISURE PROD. TOOLS HARDWARE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	159.00 \$M	197.00 \$M	200.00 \$M	202.00 \$M
Canadian Exports	1.30 \$M	2.20 \$M	3.10 \$M	4.10 \$M
Canadian Share of Market	0.80 %	1.10 %	1.50 %	2.00 %

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

Major Competing Countries Market Share

GERMANY WEST	26.20 %
AUSTRIA	23.30 %
FRANCE	15.10 %
TAIWAN	6.50 %
ITALY	5.80 %
UNITED STATES OF AMERICA	5.10 %

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

Products/services for which there are good market prospects:

1. ICE HOCKEY EQUIPMENT

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BERNE

Market: SWITZERLAND

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

Activity: REPORT-SWISS MARKET FOR SPORTING GOODS
Expected Results: INCREASED INTEREST IN SWISS MARKET. DISTRIBUTE TO CDN EXPORTERS

Activity: PROMOTE CSGA FEB 89 (MTL) FAIR & RECRUIT BUYERS
Expected Results: 4-5 NEW BUYING CONNECTIONS

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

Activity: PRE-FAIR MAILINGS ISPD FAIRS SEPT '89 AND FEB '90
Expected Results: AWARENESS OF CDN STAND BY SWISS BUYERS

Activity: VISITING SWISSPO TRADE FAIR ZURICH (BUYERS' FAIR)
Expected Results: IDENTIFY 8-10 NEW OUTLETS FOR WINTER SPORTING GOODS

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BERNE

Market: SWITZERLAND

Sector : EDUCATION, MEDICAL, HEALTH PROD

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

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	702.50 \$M	741.20 \$M	744.40 \$M	746.20 \$M
Canadian Exports	1.70 \$M	3.50 \$M	4.20 \$M	5.20 \$M
Canadian Share of Market	0.24 %	0.47 %	0.56 %	0.70 %

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

Major Competing Countries	Market Share
GERMANY WEST	40.30 %
UNITED STATES OF AMERICA	12.20 %
FRANCE	9.60 %
JAPAN	7.40 %
AUSTRIA	4.70 %
ITALY	4.10 %

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

Products/services for which there are good market prospects:

1. ORTHOPAEDIC/REHABILITATION EQUIPMENT
2. MEDICAL INSTRUMENTS

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Unsuitable product

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BERNE

Market: SWITZERLAND

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

Activity: PARTICIPATION WITH INFO BOOTH -CATALOG SHOW 1990 IFAS
Expected Results: I.D. 30-50 AGENTS OF SPECIFIC PRODUCT NEEDS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BERNE

Market: SWITZERLAND

Sector : INDUSTRIAL MACHIN, PLANTS, SERV.

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	5180.00 \$M	8717.00 \$M	9850.00 \$M	10100.00 \$M
Canadian Exports	29.40 \$M	38.40 \$M	39.20 \$M	39.90 \$M
Canadian Share of Market	0.57 %	0.43 %	0.39 %	0.40 %

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

Major Competing Countries Market Share

GERMANY WEST	44.20 %
ITALY	10.20 %
UNITED STATES OF AMERICA	9.40 %
FRANCE	7.40 %
UNITED KINGDOM	7.40 %
JAPAN	4.90 %

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

Products/services for which there are good market prospects:

1. MOTORS

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing

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RPTDL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: BERNE

Country: SWITZERLAND

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

	Total (\$ Million)	Canadian Share	Major Competitor Share
Current year	3000.00	6.00	10.00
One year ago	3200.00	1.50	12.00
Two years ago	5000.00	2.00	10.00

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

IN YOUR OPINION HOW MUCH FOREIGN INVESTMENT FROM YOUR TERRITORY CAN CANADA REASONABLE EXPECT TO ATTRACT NEXT YEAR? [INCLUDE PORTFOLIO IF THAT IS PRIME FOCUS] \$30 MILLION SWISS FOCUS FOR 1989-92 IS ON SECURING THIER POSITION WITHIN THE EEC. CONSEQUENTLY THEIR PRIMARY TARGET FOR INVESTMENT/

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

- FRG
- USA
- UK
- H.K.

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

- ALMOST EXCLUSIVELY COMPANY TO COMPANY, FRG EMBASSY IS ACTIVE IN PROMOTING CLIMATE
- REGULAR VISITS BY MANY STATE ORGANIZATION, ESP. GEORGIA, CALIFORNIA, N.Y., PA, & MASS. WHICH INVOLVE USE OF STATE PRIVATE SECTOR COMP, GALA DINNERS & HARD SELL ON SPECIFIC INVESTMENT OPPORTUNITIES.
- MAJOR VISIBLE ACTIVITY IS CHAMBER OF COMMERCE PROMOTION, REGULAR DISTRIBUTION OF PROMOTIONAL NEWSLETTER LISTING INVESTMENT OPPORTUNITIES & VISITS BY REGIONAL IND DEV COUNCIL

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: BERNE

Country: SWITZERLAND

Competitors' activities cont'd:

- INFREQUENT BUT EFFECTIVE VISITS BY COMBINATION OF OFFICIALS & CORPORATE LEADERS PROMOTING LONG TERM OPPORTUNITY OF H.K.

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

- MORE EUROPEAN THAN USA IN BUSINESS METHODS
- GOOD PLACE TO LIVE

the following constraints:

- SMALL & WIDELY SPREAD MKT

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

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

The mission believes that the following sectors are of greatest interest to investors in its territory/country with an assigned ranking of 1-10:

Sector	Ranking
Agriculture/Food/Fish	1
Resource Processing	5
Machinery and Equipment	3
Transportation	8
Consumer Products	6
Commercial Service	7
Computer and Communications	9
Health Care Products/Medical	4
Aerospace and Defence	2
Strategic Technologies	10

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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: BERNE

Country: SWITZERLAND

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

Date

Type: MISSION OUT, MINISTERIAL

MINISTERIAL PRESENTATION

5/89

Location: ZURICH/CH GENEVA/CH

Invest Nature: PORTFOLIO

Sector: MULTIPLE SECTORS

Cooperants: CSA

Estimated Budget: \$500.00

DAVOS SYMPOSIUM

1/90

Location: DAVOS/CH

Invest Nature: ALL

Sector: MULTIPLE SECTORS

Cooperants: WEF/INV. CDA

Estimated Budget: \$16,000.00

Type: SEMINAR, ABROAD

CDN DOOR TO N.A.

5/89

Location: ZURICH/CH

Invest Nature: ACQ/GREENFIELD

Sector: FOREST PRODUCTS, EQUIP, SERVICES

Cooperants: OSEC

Estimated Budget: \$2,000.00

ROUND TABLE OF CANADA

6/89

Location: OTTAWA/CDA

Invest Nature: ACQ/GREENFIELD

JT. VENTURE

Sector: MULTIPLE SECTORS

Cooperants: WEF

Estimated Budget: \$2,500.00

Type: DIRECT MAIL CAMPAIGN

DIRECT MAILING

0/89

Location: CH

Invest Nature: PORTFOLIO

JOINT VENTURE

STRAT. PARTNER

Sector: ADVANCED TECH. PRDD. & SERV

Cooperants:

Estimated Budget: \$2,000.00

29/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: BERNE

Country: SWITZERLAND

Date

Type: OUTCALL PROGRAM

SR EXECUTIVE CALL PROGRAM

0/89

Location: CH

Invest Nature: GREENFIELD

Sector: ADVANCED TECH. PRDD. & SERV

Cooperants: AMBASSADOR

Estimated Budget: \$1,500.00

Total estimated budget for all proposals:

\$24,500.00

Post : BERNE

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Post/Contact</u>
89/10/03	ITU COMMUNICATION'89, GENEVA, SWITZERLAND FAIR, NATIONAL STAND	ADVANCED TECH. PROD. & SERV G.COTE/H.SCHROETER

RPT81

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: BRUSSELS

Country: BELGIUM

MODEST YET BALANCED GROWTH HAS SUPPORTED THE BELGIAN ECONOMY OVER THE FIRST HALF OF 1988 AND BARRING ANY DRAMATIC OUTSIDE SHOCKS THIS GROWTH WILL BE MAINTAINED IF NOT STRENGTHENED INTO 1989.

PRIVATE CORPORATE INVESTMENT, UP 8% IN 1987 AND EXPECTED TO INCREASE 10% IN 88; CONSTRUCTION, PRIMARILY RESIDENTIAL (UP 26% IN 87); AND CONSUMPTION ESPECIALLY OF CONSUMER DURABLES, HAVE BEEN IMPORTANT FACTORS IN PRODUCING 1.8% REAL GROWTH IN 1987 AND A FORECAST OF 3% IN 88. THE CLOSE LINKS TO THE EUROPEAN MONETARY SYSTEM (EMS) AND THE CONTINUED WEAKNESS OF THE US DOLLAR AND OF ENERGY PRICES HAVE ENABLED BELGIUM TO KEEP THESE GAINS WITH MINIMUM INFLATIONARY LOSSES. EVEN THE NEGATIVE ASPECTS IN THE BELGIAN ECONOMY ARE STARTING TO EASE, THE CENTRAL GOVERNMENT'S BUDGET DEFICIT, AS HIGH AS 11% OF GROSS NATIONAL PRODUCT (GNP) IN 1986, IS BEING CONTAINED BY REDUCED PUBLIC INVESTMENT AND CONSUMPTION AND COULD BE DOWN TO 7% OF GNP IN 1989. ALTHOUGH THE UNEMPLOYMENT RATE, CURRENTLY 11%, HAS FALLEN SLIGHTLY, IT WILL CONTINUE TO BE A MAJOR CONCERN. THE STRONG CURRENCY BUOYED BY A SURPLUS BALANCE OF PAYMENTS AND MEMBERSHIP IN THE EMS, GAINS IN PRODUCTION AND PRIVATE INVESTMENT, ALONG WITH RENEWED VIGOUR IN THE SERVICES SECTOR ALL POINT TO A SOLID IF NOT SPECTACULAR ADVANCE FOR THE BELGIAN ECONOMY IN THE COMING YEAR.

THE VOLUME OF BELGIUM'S INTERNATIONAL TRADE INCREASED 7% IN 1987 AND ALTHOUGH THERE WAS A SMALL MERCHANDISE TRADE DEFICIT, OVERALL PAYMENTS REMAINED IN SURPLUS. THE TRADE ACCOUNT APPEARS TO BE CONTINUING THIS TREND IN 1988 AND, UNLESS THERE ARE MAJOR RISES IN THE VALUE OF THE US DOLLAR AND/OR OIL PRICES, THE SURPLUS SHOULD BE MAINTAINED FOR 1989. BELGIUM IS AN EXPERIENCED INTERNATIONAL TRADER RANKING 10TH IN THE WORLD. THREE QUARTERS OF ITS TRADE IS WITH OTHER MEMBERS OF THE EEC. OVER THE LAST TWO YEARS EXPORTS TO CANADA HAVE BEEN INHIBITED BY THE STRONG BELGIAN FRANC. FROM THE CANADIAN SIDE, THE REVERSE APPLIES, THE COMPETITIVE CANADIAN DOLLAR HAS FACILITATED OUR SALES AND BELGIUM HAS BECOME OUR 6TH LARGEST MARKET, ACCOUNTING FOR OVER C \$ 1.2 BILLION IN 1987.

TRADITIONAL FORESTRY AND METALS/MINERALS PRODUCTS STILL REPRESENT 75% OF CANADA'S EXPORTS IN THIS MARKET BUT THE OPPORTUNITIES FOR HIGH VALUE ADDED MANUFACTURES AND CONSUMER GOODS ARE EXCELLENT. MORE CANADIAN AND BELGIAN COMPANIES ARE CONSIDERING THE MUTUAL ADVANTAGES OF JOINT VENTURES AND INVESTMENTS IN ORDER TO BENEFIT FROM THE CHANGED TRADING ENVIRONMENT EXPECTED WITH A UNIFIED EUROPEAN MARKET AND A NORTH AMERICAN FREE TRADE AREA. IT IS ON THESE MORE SOPHISTICATED FORMS OF COOPERATION AND INTERDEPENDENCE, RATHER THAN THE SIMPLE EXCHANGE OF GOODS, THAT THE FUTURE DIVERSIFICATION AND EXPANSION OF CANADA/BELGIUM TRADE WILL DEPEND. THE OFFICES OF OVER 167 FINANCIAL INSTITUTIONS GIVE THE GRAND DUCHY OF LUXEMBOURG AN INTERNATIONAL IMPORTANCE FAR BEYOND ITS SMALL SIZE (2,600 SQ KMS) AND POPULATION (366,000). LUXEMBOURG IS EXPECTED TO PLAY A MAJOR ROLE IN THE INTEGRATION OF FINANCIAL SERVICE WITHIN THE COMMON MARKET.

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: BRUSSELS

Country: NATO, BRUSSELS

GENERAL: THE DELEGATION TID PROGRAMME IS SPECIALIZED IN DEFENCE PRODUCTS AND RELATED COMMUNICATIONS AND ELECTRONICS SECTORS. THE MULTILATERAL NATO FRAMEWORK RESULTS IN A MIXTURE OF TRADE PROMOTION/MARKET ACCESS, DEFENCE SYSTEMS DEVELOPMENT PROJECTS AND BID OPPORTUNITIES.

TRADE PROMOTION/MARKET ACCESS: DELEGATION TID STAFF HAVE NOTED A MARKED CHANGE OF ATTITUDE ON THE PART OF OTHER NATIONS FOLLOWING PUBLICATION OF CANADA'S DEFENCE WHITE PAPER. THERE HAS BEEN A MUCH FREER FLOW OF TRADE OPPORTUNITIES/MARKET ACCESS INFORMATION TO THE DELEGATION. TID STAFF HAVE BEEN PARTICULARLY ACTIVE IN STRUCTURING THE NATO CONVENTIONAL ARMAMENTS PLANNING SYSTEM (CAPS) SINCE IT PROMISES TO YIELD IMPORTANT DEFENCE SYSTEMS DEVELOPMENT OPPORTUNITIES FOR CANADIAN INDUSTRY OVER THE NEXT 10 YEARS. ON THE EUROPEAN SCENE, CLOSE RELATIONS HAVE BEEN CEMENTED WITH SOME SYMPATHETIC REPRESENTATIONS TO THE INDEPENDENT EUROPEAN PROGRAMS GROUP (IEPG) WHICH HAS ALLOWED TID STAFF TO FOLLOW CLOSELY THEIR DEFENCE EQUIPMENT PLANS, IN PARTICULAR A TENDENCY TOWARDS PROTECTIONIST MEASURES. THIS HAS BEEN MOST NOTABLE RECENTLY IN THE PROPOSED EEC TARIFF ON DEFENCE PRODUCTS. DELEGATION INTERVENTIONS DURING THE CONFERENCE OF NATIONAL ARMAMENTS DIRECTORS (CNAD) MEETING AND IN THE NORTH ATLANTIC COUNCIL HAVE ALERTED OUR EUROPEAN PARTNERS THAT CANADA CONSIDERS THE PROPOSED TARIFF AS A THREAT TO DEFENCE TRADE AND NATO ARMAMENTS COOPERATION PROJECTS.

SYSTEM DEVELOPMENT PROJECTS: AIDED BY WELL-COORDINATED INTER-DEPARTMENTAL ACTION PLANS AND AN ACTIVE INTERVENTIONIST GROUP OF CANADIAN INDUSTRIALISTS IN THE NATO INDUSTRIAL ADVISORY GROUP (NIAG), CANADIAN INDUSTRY IS NOW WELL ESTABLISHED IN THE MANY SYSTEMS DEVELOPMENT PROGRAMS BEING PROGRESSSED UNDER THE CNAD. EXAMPLES OF SYSTEMS WERE REPORTED IN LAST YEAR'S TID OVERVIEW. MANY ADDITIONAL OPPORTUNITIES WILL FOLLOW FROM THE CAPS WITH MID-1989 AS THE TARGET DATE FOR THE FIRST CAPS PLAN. INCREASING COMMITMENT BY THE UNITED STATES TO NATO PROGRAMMES SHOULD ALSO YIELD IMPORTANT NEW OPPORTUNITIES FOR CANADIAN INDUSTRY GIVEN THE CLOSE CANADA/U.S. RELATIONSHIP AND THE FREE TRADE AGREEMENT, AND IF THE NATO UMBRELLA CAN BE RETAINED IN THE FACE OF EUROPEAN PROTECTIONIST SENTIMENTS, SIGNIFICANT ADDITIONAL JOINT VENTURE PROSPECTS BETWEEN EUROPEAN AND CANADIAN INDUSTRY SHOULD BE POSSIBLE.

BID OPPORTUNITIES: DELEGATION TID STAFF, WORKING CLOSELY WITH EXPERT STAFF FROM DEPARTMENTS, HAVE SUCCEEDED IN REDEFINING AND SHARPENING THE APPLICATION OF INDUSTRIAL BENEFIT RULES AND ARRANGEMENTS IN THE NATO AWACS PROGRAMME AND INCREASING INDUSTRIAL BID OPPORTUNITIES FROM THE NATO MAINTENANCE AND SUPPLY AGENCY (NAMS). THIS EFFORT WILL CONTINUE. THE NATO MARKETPLACE CONFERENCE, ORIGINALLY PLANNED FOR JUNE, 1988 HAS BEEN POSTPONED BY THE ORGANIZERS UNTIL MARCH, 1989. THE TID STAFF HAS RECENTLY ENTERED INTO FORMAL DISPUTE PROCEDURES ON SOME MAJOR NATO INFRASTRUCTURE PROGRAMMES TO SUPPORT CANADIAN FIRMS AND TO INDICATE CANADA'S SERIOUS CONCERN WITH SOME HIGHLY MANIPULATIVE PRACTICES. FOR MANY CANADIAN FIRMS, INDUSTRIAL BRIEFINGS TO NATO EXPERT GROUPS HAS RESULTED IN MARKETING OPPORTUNITIES IN INDIVIDUAL NATIONS. CANADIAN FIRMS HAVE RECEIVED BRIEFINGS

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RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: BRUSSELS

Country: NATO, BRUSSELS

AT NATO . A NUMBER OF SUCH PRESENTATIONS ARE ALREADY PLANNED FOR THE NEAR FUTURE AND IN FY 1989/90. THE RECENT AGREEMENT ON THE AIR COMMAND AND CONTROL SYSTEM (ACCS) MANAGEMENT STRUCTURE OPENS UP 10-15 YEAR PROGRAMME, PARTICULARLY IN COMMUNICATIONS, ELECTRONICS AND SOFTWARE.

29/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 EXPORT PROMOTION PRIORITIES

Mission: BRUSSELS

Country: BELGIUM

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

1. FOREST PRODUCTS,EQUIP,SERVICES
BELGIUM MAJOR LUMBER IMPORTING CENTRE FOR EUROPE.
2. ADVANCED TECH. PROD. & SERV
FAST GROWTH/HIGH IMPORT SECTOR.
EXCELLENT SCOPE FOR CANADIAN HIGH TECH PRODUCTS/SERVICES.
3. EDUCATION,MEDICAL,HEALTH PROD
SPECIFIC SUB-SECTORS IDENTIFIED AS OFFERING GOOD PROSPECTS.
WILL BENEFIT FROM CONCENTRATED PROMOTION.
4. DEFENCE PROGRAMS,PRODUCTS,SERV
RECENTLY SIGNED MOU ON DEFENCE INDUSTRIAL COOPERATION HAS CREATED
NEW OPPORTUNITIES.

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

1. FOREST PRODUCTS,EQUIP,SERVICES
2. MINE,METAL,MINERAL PROD & SRV

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BRUSSELS

Market: BELGIUM

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: ARMAMENTS & VEHICLES

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	0.00 \$M	1.50 \$M	1.13 \$M	1.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	1.90 \$M	0.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	0.00 %

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

Major Competing Countries

Market Share

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

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. COMPOSANTS POUR SYSTEMES ELECTRONIQUES D'ARMEMENTS
2. SOUS-TRAITANCE (DANS LE CADRE DE L'OTAN)
3. PROJ(E PRDD)CONJ A DETERM DANS CADRE ENTENTE BILAT

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- VIVE CONCUR EUROP IND ACTIVE DANS
- PRESQUE LES MEMES SECTEURS D'ACT.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BRUSSELS

Market: BELGIUM

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

Activity: MISSION DE QUELQUES 30 INDUSTRIELS BELGES, AU CDA EN MAI 89
Expected Results: DEVELOPPEMENT DU J.U. ET DE LA COOPERATION INDUSTRIELLE

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BRUSSELS

Market: BELGIUM

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: SECURITY PRODUCTS

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

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

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

Products/services for which there are good market prospects:

1. PROTECTION CONTRE L'INTRUSION
2. PROTECTION CONTRE L'INDIVIDU

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

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

29/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BRUSSELS

Market: BELGIUM

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

Activity: INITIER DES CONTACTS AVEC DES MENSUELS D'INFO & ASSOC PROF.
Expected Results: MIEUX CERNER LES BESOINS DU MARCHE

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BRUSSELS

Market: BELGIUM

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: COMPUTERS HARD/SOFTWARE & COMP

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1.43 \$M	1.60 \$M	1.92 \$M	2.30 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.00 \$M	0.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	0.00 %

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

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

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

Products/services for which there are good market prospects:

1. PERIFERIQUES
2. LOGICIELS

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- willingness of exporters to invest/joint venture in territory

29/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BRUSSELS

Market: BELGIUM

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

Activity: FLANDERS TECHNOLOGY INTERNATIONAL (APRIL-MAY 89)
Expected Results: EXCHANGE OF TECHNOLOGIES

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BRUSSELS

Market: BELGIUM

Sector : FOREST PRODUCTS,EQUIP,SERVICES

Sub-Sector: WOOD AND WOOD PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	671.00 \$M	640.00 \$M	617.50 \$M	598.30 \$M
Canadian Exports	67.00 \$M	63.70 \$M	48.80 \$M	47.60 \$M
Canadian Share of Market	10.00 %	9.90 %	7.90 %	7.90 %

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

Major Competing Countries

Market Share

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

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

Products/services for which there are good market prospects:

1. SOFTWOOD LUMBER
2. HARDWOOD LUMBER
3. PLYWOOD
4. SHINGLES AND SHAKES
5. HARDWOOD VENEERS
6. OTHER WOOD PRODUCTS

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Import duties are moderate
- Aggressive marketing
- Trade Fair activity
- Competitive pricing
- Strong sectoral capability in Canada

29/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BRUSSELS

Market: BELGIUM

Factors for Canadian exports not reaching market potential:

- VARIES FM PROD LINE TO PROD LINE.
- IN SECONDARY/HIGH VALUE PROD REQ

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

Activity: REVIEW POSS. INTRO OF FURTHER MFG'D PROD: SOLID WD PANELING
Expected Results: TO DETERMINE POSSIBILITY TO CHANGE CUSTOMER TASTES

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

Activity: CONT'D PROM VIA VIDEO/TECHNICAL LITERATURE OF TFC CONSTRUCT
Expected Results: INCREASE MARKET/CONSUMER AWARENESS OF TFC AND RELATED BUILDING PRODUCTS

Activity: CONT'D PROMOTION OF LESS WELL KNOWN CANADIAN SPECIES
Expected Results: INCREASED AWARENESS AND DEMAND FOR CANADIAN PRODUCTS

Activity: IF FUNDING AVAIL, PURSUE RECOMMENDED DEMO HOUSING PROJECT

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BRUSSELS

Market: BELGIUM

Sector : CONSUMER PRODUCTS & SERVICES

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

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1.90 \$M	1.80 \$M	1.70 \$M	1.70 \$M
Canadian Exports	275.00 \$M	250.00 \$M	250.00 \$M	230.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	0.00 %

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

Major Competing Countries	Market Share
NETHERLANDS	27.00 %
FRANCE	21.00 %
GERMANY WEST	19.00 %
ITALY	45.00 %

Products/services for which there are good market prospects:

1. WINTERWEAR
2. CHILDREN'S WEAR
3. ACTIVE SPORTSWEAR
4. FUR

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Import duties are moderate

Factors for Canadian exports not reaching market potential:

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

29/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BRUSSELS

Market: BELGIUM

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

Activity: CONT'D MKT ANAL EXP RESULTS: DEFINE SPECIFIC OPPORT.; REPORT 1
Expected Results: BETTER APPRECI IN CANADA OF (EXPORT POTENTIAL OF MKT)
EFFORT

Activity: BASED ON RESP TO MKT STUDY, PROP SENDING MAJOR BUYER(S) TO CDA
Expected Results: COORDINATED PENETRATION OF BELGIAN MARKET

29/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BRUSSELS

Market: BELGIUM

Sector : EDUCATION, MEDICAL, HEALTH PROD

Sub-Sector: PHARMACEUTICALS, BIOTECHNOLOGY

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	2000.00 \$M	2500.00 \$M	3000.00 \$M	2900.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.00 \$M	0.00 \$M
Canadian Share of Market	2.00 %	3.00 %	3.00 %	5.00 %

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

Major Competing Countries

Market Share

GERMANY WEST	35.00 %
UNITED STATES OF AMERICA	20.00 %
FRANCE	15.00 %
UNITED KINGDOM	10.00 %
NETHERLANDS	7.00 %
OTHER COUNTRIES	13.00 %

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

Products/services for which there are good market prospects:

1. CHIMIE CLINIQUE
2. IMMUNOCHIMIE
3. MICROBIOLOGIE
4. HAEMATOLOGIE, HISTOLOGIE CYTOTOLOGIE
5. DIAGNOSTIQUE IN VITRO MARCHE VETERINAIRE
6. SONDÉ DNA
7. SEMENCES ARTIFICIELLES MAIS, CÉREALES
8. BIOPESTICIDES/RESISTANCES AUX AGENTS PATHOG.
9. BIOHERBICIDES
10. BIOENGRAIS (FIXATION)
11. HORTICULTURE

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Import duties are low

29/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BRUSSELS

Market: BELGIUM

Factors for Canadian exports not reaching market potential:

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

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

Activity: PURSUE CONTACTS W/IND FED(FECHIM) & IMPORTERS/DIST OF DIAGN.
Expected Results: BETTER KNOWLEDGE OF MARKET

Activity: CONT TO UPDATE LIST OF CDN PROD'RS WHO SEEK TO DEV THEIR EXP
Expected Results: FACILITATE SETTING UP CONTACTS, INCLUDING FOR VISITING CDN CO REPRESENTATIVES OR ANY CANADIAN MISSION MEMBERS

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

Activity: EXPOMED 90, BRUSSELS, MAY 1990
Expected Results: GREATER AWARENESS A CDN CAPAB MEDICAL PROD/EQPT SECTOR, IN GENERAL & DIAGNOSTICS, INCL FOR VET APPLIC, IN PART

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

Activity: INCR PROM'L ACTIV. I.E. ARTICLES IN TRADE REVIEWS
Expected Results: WIDEN FIELD OF POTENTIAL BELGIAN CANDIDATES WHO ARE PREPARED TO CONSIDER CDN BUSINESS PROP IN BIOTECHNOLOGY/DIAGNOSTICS

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BRUSSELS

Market: BELGIUM

Sector : EDUCATION, MEDICAL, HEALTH PROD

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

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

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

Major Competing Countries	Market Share
GERMANY WEST	35.00 %
FRANCE	25.00 %
ITALY	15.00 %
UNITED KINGDOM	10.00 %
NETHERLANDS	5.00 %
OTHER COUNTRIES	10.00 %

Products/services for which there are good market prospects:

1. ELECTRO/MICROELECTR FOR PHYS MEDICINE
2. DIAGNOSTIC, SELF-HELP THERAPEUTIC DEVICES

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector

Factors for Canadian exports not reaching market potential:

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

29/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BRUSSELS

Market: BELGIUM

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

Activity: FOLLOW-UP TO CANADIAN PARTICIPATION IN EXPOMED 88.
Expected Results: INCREASED POSSIBILITIES FOR DISTRIBUTION ARRANGEMENTS

Activity: GATHER INFO ON PRINCIPLE COMPETITIONS IN BELGIAN MARKET
Expected Results: DETERMINE MARKET CHARACTERISTICS

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

Activity: EXPOMED 90 - BRUSSELS, MAY 1990
Expected Results: ESTABLISHED NEW CONTACTS; INCREASE AWARENESS OF CDN. CAPABILITIES IN THIS PARTICULAR SECTOR.

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

Activity: EXAM POSS CDN MISS TO THE BENELUX: AIDS FOR HANDICAPPED
Expected Results: INCREASED BILATERAL COOPERATION IN THIS SECTOR THROUGH DISTRIBUTION ARRANGEMENTS OR OTHER FORMS SUCH AS TECHN EXCHANGE

29/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BRUSSELS

Market: BELGIUM

Sector : INDUSTRIAL MACHIN, PLANTS, SERV.

Sub-Sector: MANUFACT & MATERIAL PLANT, EQP.

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

Major Competing Countries	Market Share
GERMANY WEST	45.00 %
FRANCE	20.00 %
NETHERLANDS	15.00 %
DENMARK	5.00 %
OTHER COUNTRIES	15.00 %

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

Products/services for which there are good market prospects:

1. MAT TRAIT DECHETS SOLIDES. CONTR EMIS INCINERATEUR
2. MAT & EQUIP POUR TRAIT A LA SOURCE DES EAUX USEES
3. MATERIEL TRAITEMENT DECHETS TOXIQUES
4. TRAIT DES BOUES, EN PART EXTRACTION HYDROCARBURES
5. INSTRUMENTS MESURE, REGULATION, CONTROLE
6. MATERIEL DE RECYCLAGE DECHETS-COMPOSTAGE
7. "ENVIRONMENTAL SECURITY" INDUSTRIE NUCLEAIRE

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Market prospects have not been adequately explored
- MKT FOR ENVIRON PROD/EQUIP EXPAND-
- ING & REQUIRES CONT'D MONITORING

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BRUSSELS

Market: BELGIUM

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

Activity: CONTACT W/CURRENT & NEW LOCAL GOVT ENVIRONMENTAL AUTHO
Expected Results: WIDEN KNOWLEDGE OF MARKET, INCREASE CONSUMER AWARENESS
CANADIAN CAPABILITIES

Activity: LIST PERSONS & COS IN BELG ACTIVE IN ENVIRONMENT SECTOR
Expected Results: FACILITATE CONTACTS BETWEEN CDN COS WHO SEEK TO PENETRATE
THE MKT & INTERESTED BELGIAN FIRMS LOOKING FOR NEW SOURCES

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

Activity: INTENSIFY PROM ACTIVITIES VIA DISTREBS. OF EXISTING PUBLIC.
Expected Results: STRENGTHEN CANADA'S PRESENCE IN THIS HIGHLY COMPETITIVE
MARKET

Activity: VISIT AQUA-EXPO, BRUS, NOV 89, IFEST, GHENT & OTHER FAIRS IN BEL
Expected Results: ESTABLISH NEW CONTACTS. VISITS ALSO PROVIDE OPPORTUNITIES
LOCATE ANY SIGNIFICANT NEW PRODUCT DEVELOPMENT

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: BRUSSELS

Country: BELGIUM

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

	Total (\$ Million)	Canadian Share	Major Competitor Share
Current year	6000.00	6.00	18.00
One year ago	5800.00	5.00	15.00
Two years ago	6000.00	6.00	15.00

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

C \$ 400 MILLION

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

- NETHERLANDS
- FRANCE
- W. GERMANY
- SPAIN

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

- PARTICIPATION IN TRADE FAIRS.
- TRADE/INVESTMENT MISSIONS.
- INDIVIDUAL COMPANY PROMOTION (TRAVEL, HOSPITALITY).
- LOCAL/REGIONAL INCENTIVE PROGRAMS (TAY, TRAINING, ETC).

RPTDL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: BRUSSELS

Country: BELGIUM

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

- MORE COMFORTABLE WITH BUSINESS ENVIRONMENT.
- ACCESS TO N.A. MARKET.
- EASIER FOR SMALL/MEDIUM SIZED COMPANIES.
- FRENCH LANGUAGE.
- GOOD INTRODUCTION TO N. AMERICA.

the following constraints:

- DISTANCE
- BUSINESS STYLE
- LACK OF FAMILIARITY
- COMPETITION
- TRANSFER KEY PERSONNEL

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

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

The mission believes that the following sectors are of greatest interest to investors in its territory/country with an assigned ranking of 1-10:

Sector	Ranking
Agriculture/Food/Fish	6
Resource Processing	1
Machinery and Equipment	2
Transportation	4
Consumer Products	9
Commercial Service	10
Computer and Communications	7
Health Care Products/Medical	5
Aerospace and Defence	8
Strategic Technologies	3

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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: BRUSSELS

Country: CANADA

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

	Date
Type: MISSION IN, TO INDUSTRY	
MISSION HI-TECH IN COOP WITH PROVINCES FABRIMETAL ASSOCIATION.	5/89
Location: QUEBEC/ONT/ALBERTA	
Invest Nature: JOINT VENTURE ACQUISITION	
Sector: GRAINS AND OILSEEDS	
Cooperants: FABRIMETAL PROVINCES	
Estimated Budget: \$5,000.00	
Type: OTHER PROMOTION	
CONCENTRATED PROMOTION IN ONE CITY.	9/89
Location: ANTWERP	
Invest Nature: VARIOUS	
Sector: FISHERIES, SEA PRODUCTS & SERV.	
Cooperants: BRUSSELS BASED CAN. COMPANIES.	
Estimated Budget: \$3,000.00	
CONCENTRATED PROMOTION IN ONE CITY.	3/90
Location: KORTRIJK	
Invest Nature: ACQUISITION GREENFIELD JOINT VENTURE	
Sector: GRAINS AND OILSEEDS	
Cooperants: BRUSSELS BASED CANADIAN COMPANIES.	
Estimated Budget: \$3,000.00	
CONCENTRATED PROMOTION IN ONE CITY.	11/89
Location: HASSELT	
Invest Nature: VARIOUS	
Sector: FISHERIES, SEA PRODUCTS & SERV.	
Cooperants: BRUSSELS BASED CANADIAN COMPANIES	
Estimated Budget: \$3,000.00	
ENTREPRENEUR MIGRANT ADVERTISING.	2/90
Location: BELGIUM	
Invest Nature: VARIOUS	
Sector: MULTIPLE SECTORS	
Cooperants: IMMIGRATION PROGRAM BRU	
Estimated Budget: \$8,000.00	

Total estimated budget for all proposals: \$22,000.00

Post : BRUSSELS

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Post/Contact</u>
89/04/24	FLANDERS TECHNOLOGY INTL' GHENT, BELGIUM INFO BOOTH, ONLY	ADVANCED TECH. PROD. & SERV D.ADAMS/G.COTE
89/09/00	MEDICAL PRODUCTS BUYERS MISS. FROM BELGIUM MISSION IN, TO INDUSTRY	EDUCATION, MEDICAL, HEALTH PROD
90/03/01	BATIBOUW-ARCHITECTURAL DESIGN SHOW, BELGIUM INFO BOOTH, ONLY	CONSTRUCTION INDUSTRY

RPT81

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: COPENHAGEN

Country: DENMARK

THE DANISH ECONOMY IN EARLY 1989 IS CHARACTERIZED BY A SLOWDOWN IN CONSUMER SPENDING, A DECLINE IN INVESTMENTS AS WELL AS AN UPSWING IN INDUSTRIAL EXPORTS. AUSTERITY CONTINUES TO BE THE DANISH GOVERNMENT'S POLICY COURSE WITH REDUCTIONS IN THE PUBLIC SECTOR, AND CONTINUED HIGH TAXATION. THE GOVERNMENT HAD HOPED THIS YIELD A SIZEABLE BUDGETARY SURPLUS THIS YEAR TO BE USED TO PAY OFF SOME OF DENMARK'S EXTERNAL DEBT WHICH IS THE HIGHEST PER CAPITA AMONG OECD COUNTRIES. HOWEVER, LATEST FORECASTS ARE INDICATING THAT THE SLOWDOWN IN THE DOMESTIC ECONOMY WILL RESULT IN LOWER REVENUES THAN PLANNED AND THE BUDGET WILL LIKELY BE SLIGHTLY IN DEFICIT. GNP WHICH HAS NOT INCREASED SINCE 1986, IS EXPECTED TO REGISTER ONLY 1.5% GROWTH AND UNEMPLOYMENT WILL LIKELY RISE TO 4.5% FROM ITS PRESENT 8.5%. IMPORTS ARE SEEN AS STAYING AT A CONSTANT LEVEL WHILE EXPORTS SHOULD RISE 5 - 7% LEADING TO A TRADE SURPLUS. THIS PLUS THE EXPECTED SHRINKAGE OF DOMESTIC DEMAND WILL HELP THE BALANCE OF PAYMENTS SITUATION. HOWEVER, GIVEN THE LARGE DEBT SERVICE OUTFLOW IMPROVEMENT WILL STILL BE MARGINAL LEAVING THE DEFICIT AT 2.5% OF GNP. FROM CANADIAN PERSPECTIVE THESE ECONOMIC DEVELOPMENTS WILL SOMEWHAT LESSEN OUR EXPORT OPPORTUNITIES. HOWEVER, DENMARK REPRESENTS AN ATTRACTIVE MARKET FOR CANADIAN EXPORTERS IN VIEW OF ITS HIGH PER CAPITA INCOME, MEMBERSHIP IN THE EC, SIMILARITY OF BUSINESS PRACTICE (INCLUDING A WIDESPREAD ENGLISH LANGUAGE CAPABILITY) AND CLEAR DISTRIBUTION CHANNELS. ALTHOUGH THE MARKET IS DEMANDING AND THE COMING EC INTERNAL MARKET PROCESS MAY INCREASE COMPETITION TO SOME EXTENT, CANADIAN EXPORTS CONTINUE TO BE SUCCESSFUL IN BOTH TRADITIONAL AND NEW PRODUCT AREAS. IN 1988 OUR EXPORTS GREW 19% TO \$131 MILLION (STATS CANADA FIGURES) WITH MAJOR ITEMS BEING FISH PRODUCTS, COAL, CHEMICAL PRODUCTS, HI-TECH PRODUCTS AND MEDICAL SUPPLIES. DANISH EXPORTS TO CANADA TOTALED ESTIMATED \$245M LAST YEAR AND ARE MAINLY FOOD-STUFFS, FURNITURE, CONSUMER GOODS AND MEDICAL PRODUCTS. IT SHOULD BE NOTED THAT CANADIAN STATISTICS UNDERCOUNT OUR EXPORTS TO DENMARK BY NEARLY 20% DUE TO THE ENTREPOT PROBLEM (I.E. MANY GOODS ARE SHIPPED VIA OTHER PORTS). USING DANISH STATISTICS OUR EXPORTS LAST YEAR WERE \$156M. WE SEE GOOD POTENTIAL FOR CANADIAN COMMUNICATION AND INFORMATICS GOODS, SOPHISTICATED OFFICE EQUIPMENT, SPECIALIZED MACHINING AND PROCESS CONTROL EQUIPMENT, HIGH DESIGN CONSUMER GOODS, BIOMEDICAL EQUIPMENT, WASTE WATER TREATMENT MACHINERY, SPECIALITY FOOD PRODUCTS AND DEFENCE PRODUCTS. AS WE MOVE INTO THE EUROPEAN INTERNAL MARKET ERA THERE WILL ALSO BE GROWING OPPORTUNITIES FOR TECHNOLOGY TRANSFER, JOINT VENTURE AND STRATEGIC PARTNERING ARRANGEMENTS BETWEEN CANADIAN AND DANISH FIRMS. THE EMBASSY HAS RECENTLY ADDED A TECHNOLOGY DEVELOPMENT OFFICER WHO WILL BE EXPLORING THESE POSSIBILITIES IN GREATER DEPTH OVER THE COMING YEAR. TARGET SECTORS INCLUDE AGRICULTURE AND FOOD PRODUCTS, FISHERIES, LIGHT MANUFACTURING AND ADVANCED TECHNOLOGY INDUSTRIES.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 EXPORT PROMOTION PRIORITIES

Mission: COPENHAGEN

Country: DENMARK

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

1. ADVANCED TECH. PROD. & SERV
DENMARK HAS THE HIGHEST COMPUTER PROCESSING CAPACITY PER CAPITA IN EUROPE. ENGLISH SOFTWARE IS ACCEPTED AND MARKET FOR ALL TYPES OF HARDWARE/SOFTWARE GROWING QUICKLY. CANADIAN COMPANIES HAVE HAD IMPORTANT SUCCESSES HERE.
2. FISHERIES, SEA PRODUCTS & SERV.
ALTHOUGH A MATURE MARKET THIS SECTOR STILL OFFERS OPPORTUNITIES FOR NEW PRODUCT PENETRATION, AS WELL AS SIGNIFICANT TECHNOLOGY EXCHANGE. THERE IS ALSO AN ONGUING NEED FOR REPORTING AND TRADE POLICY WORK IN THIS SECTOR.
3. DEFENCE PROGRAMS, PRODUCTS, SERV
POST IS INVOLVED IN BOTH PRODUCT PROMOTION AND POLICY ISSUES (MAINLY OFFSETS) WITH DANISH DEFENCE.
4. AGRI & FOOD PRODUCTS & SERVICE
THIS SECTOR ACCOUNTS FOR MAJOR PORTION OF OUR RESPONSIVE WORKLOAD - BOTH ENQUIRIES FROM CANADA AND DENMARK. IT ALSO OFFERS SIGNIFICANT TECH TRANSFER OPPORTUNITIES.

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

- | | |
|-------------------------------------|-------------------------------------|
| 1. FISHERIES, SEA PRODUCTS & SERV. | 4. CHEM PROD & PETROCHEM, EQP, SERV |
| 2. MINE, METAL, MINERAL PROD & SRV | 5. ADVANCED TECH. PROD. & SERV |
| 3. DEFENCE PROGRAMS, PRODUCTS, SERV | |

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: COPENHAGEN

Market: DENMARK

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	3719.00 \$M	3569.00 \$M	3550.00 \$M	3550.00 \$M
Canadian Exports	18.00 \$M	20.50 \$M	21.00 \$M	23.00 \$M
Canadian Share of Market	4.80 %	5.60 %	5.90 %	6.40 %

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

Major Competing Countries Market Share

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

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

Products/services for which there are good market prospects:

1. FEED FERTILIZER
2. MAPLE SUGAR (FOR PRODUCTION TOBACCO)
3. MUSSES, SEA GRASS (FOR PECTIN PRODUCTION)
4. CORN I.Q.F. AND COB (ENTERING VIA OTHER PORTS)
5. HONEY
6. SPECIAL CROPS
7. SEEDS FOR SEWING
8. VEG. AND FRUIT - FROZEN AND CANNED
9. BREEDING STOCK AND SEMEN
10. ADDITIVES AND SLAUGHTER HOUSE WASTE
11. TOBACCO
12. FRUIT SNACKS

Factors contributing to current successful Canadian exports:

- Fairs and Missions support

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: COPENHAGEN

Market: DENMARK

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Lack of promotion and advertising
- CAP OF EEC
- INSUFFICIENT INTEREST ON PART OF EXPORTERS TO SERV SUCH SMALL MKT

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

- Activity: BREEDING STOCK. ENCOURAGE CDN SUPPLIERS TO MRKT IN DEN.
Expected Results: MAINTAIN NEWLY OPENED MARKET PREVIOUSLY IN DANGER OF CLOSURE DUE TO VET. REG.S
- Activity: CONT TO INTROD & ASSIST GREENLAND BUYERS IN SOURCING IN CDA
Expected Results: IF TRANSPORTATION LINKS MAINTAINED OR EXPANDED EXPECT TO DOUBLE PRES. CDN SALE
- Activity: AS FOLLOW UP TO SIAL 88. INTRODUCE FRUIT SNACK FOOD TO DEN.
Expected Results: COVERAGE OF DANISH MARKET WITHIN A YEAR
- Activity: ASSIST CDN COS INTERESTED IN DANISH AG/FOOD PROCESSING TECH.
Expected Results: MARKET MAINTENANCE WITH SOME POSSIBILITY OF EXPANSION

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

- Activity: SUPPORT DNT AT N. EUROPE'S LRGST LVSTCK FAIR, HERNING, JUNE 89
Expected Results: MAINTAIN NEWLY OPENED MARKET PREVIOUSLY IN DANGER OF CLOSURE DUE TO VET. REG.S

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: COPENHAGEN

Market: DENMARK

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

Activity: DETAILED ANAL OF N.A. EXPORTS TO DEN. TO ALERT CDN/NEW OPPTS.
Expected Results: DIVERSIFICATION OF PRODUCTS THUS INCREASING CANADIAN SHARE OF MARKET.

Activity: INVESTIGATE LOSS OF \$10M EXPORT OF PANCREATIC GLANDS/INSULIN
Expected Results: REGAIN LOST MARKET SHARE.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: COPENHAGEN

Market: DENMARK

Sector : FISHERIES, SEA PRODUCTS & SERV.

Sub-Sector: FISH & SHELLFISH & OTHER PROD

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	910.00 \$M	1093.00 \$M	1150.00 \$M	1150.00 \$M
Canadian Exports	22.00 \$M	36.00 \$M	36.00 \$M	36.00 \$M
Canadian Share of Market	2.40 %	3.30 %	3.10 %	3.10 %

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

Major Competing Countries

Market Share

GREENLAND	35.00 %
NORWAY	16.00 %
FAROE ISLANDS	18.00 %
SWEDEN	5.00 %
ICELAND	4.00 %

Current Status of Canadian

exports in this sector/subsector: Well established and growing

Products/services for which there are good market prospects:

1. SHRIMP
2. SALMON
3. LUMPFISH ROE
4. LOBSTER
5. COD
6. EEL
7. OTHER SPECIALITY SPECIES

Factors contributing to current successful Canadian exports:

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

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: COPENHAGEN

Market: DENMARK

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

Activity: SUPPL MKT INTELL ON DANISH DOMESTIC & INTL. FISHERIES.
Expected Results: BETTER INFORMED CANADIAN AUTHORITIES AND COMPANIES ON WORLD MARKET CONDITIONS

Activity: ASSIST BOTH CDN EXPORTERS AND DANISH IMPORTERS.
Expected Results: INCREASED TRADE AND MAINTENANCE OF MARKET SHARE

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

Activity: INTL FISH.(EGPT)EXH COPEN JUNE '89 PEMD CDN PARTICIPANTS.
Expected Results: INTRODUCTION OF NEW CANADIAN EQUIPMENT AND TECH TRANSFER

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

Activity: PROMOTE CDN PROD/SPECIES COMMANDING HIGHER PRICES IN EUROPE
Expected Results: DIVERSIFICATION OF EXPORT PRODUCT RANGE-IE., EEL, MONKFISH

Activity: FOLLOW UP NFLD INTEREST IN ROE PROCESSING TECH.
Expected Results: TRANSFER OF ROE PROCESSING TECHNOLOGY TO CANADA

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: COPENHAGEN

Market: DENMARK

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	300.00 \$M	270.00 \$M	270.00 \$M	280.00 \$M
Canadian Exports	14.00 \$M	12.00 \$M	12.00 \$M	14.00 \$M
Canadian Share of Market	5.00 %	4.00 %	4.00 %	5.00 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	60.00 %

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

Products/services for which there are good market prospects:

1. AMMUNITION
2. GAS MASKS
3. SONAR
4. TACAN SYSTEMS
5. SHIP COMMUNICATIONS

Factors contributing to current successful Canadian exports:

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

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: COPENHAGEN

Market: DENMARK

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

Activity: WORK W/DAN. GOVT & IND TO MINIMIZE IMPACT OF OFFSETS ISSUE.
Expected Results: CONTINUED SALES POSSIBILITIES

Activity: REG CALLS ON KEY DEC MAKERS IN DEFENCE.
Expected Results: TO MAINTAIN CDN MARKET SHARE IN FACE OF SEVERE DANISH DEFENCE BUDGET SQUEEZE

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

Activity: FOLLOW UP TO DEFENCE PRODUCTS MISSION DEC.88
Expected Results: INTRODUCTION OF NEW CANADIAN SUPPLIERS

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: COPENHAGEN

Market: DENMARK

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	3100.00 \$M	3100.00 \$M	2800.00 \$M	2800.00 \$M
Canadian Exports	30.00 \$M	30.00 \$M	30.00 \$M	30.00 \$M
Canadian Share of Market	0.97 %	0.97 %	1.07 %	1.07 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	40.00 %
GERMANY WEST	20.00 %
JAPAN	18.00 %
UNITED KINGDOM	10.00 %
SWEDEN	5.00 %

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

Products/services for which there are good market prospects:

1. TELEPHONE RELATED PRODUCTS
2. DATA COMMUNICATION
3. SOFTWARE/COMPUTER EQUIPMENT
4. ELECTRONIC INSTRUMENTATION
5. COMPONENTS
6. PROCESS CONTROL

Factors contributing to current successful Canadian exports:

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

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: COPENHAGEN

Market: DENMARK

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Unsuitable product
- Limited appreciation/understanding of distribution system
- Performance of local agent or representative
- LIMITED TECH/MKTG SUPPORT.

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

Activity: COMPUTERIZED LISTING OF LOCAL SECTOR CONTACTS/INTERESTS
Expected Results: IMPROVED ABILITY TO INTRODUCE NEW CANADIAN PRODUCTS

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

Activity: FOLLOW UP ON RESULTS OF INCOMING TELCO MISSION MARCH 89
Expected Results: INCREASED PURCHASES OF CDN TELE/DATA PRODUCTS.

Activity: ADVANCED TECHNOLOGY MISSION FALL 89
Expected Results: NEW BUSINESS CONNECTIONS

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

Activity: ASSIST CDN COS IN CONSOLIDATING BUSINESS
Expected Results: MAINTAIN PRESENT BUSINESS VOLUME

Activity: INTRODUCE NEW CANADIAN COMPANIES APPROX 8 PER QUARTER
Expected Results: 2 NEW BUYING CONNECTIONS PER QUARTER.

Activity: UPDATE REOPRT ON DANISH ADVANCED TECH SECTOR.
Expected Results: FACILITATE UNDERSTANDING OF DANISH MARKET

Activity: CANVAS/VISIT SELECTED COMPANIES IN JUTLAND
Expected Results: ESTABLISH NEW POTENTIAL DISTRIBUTOR CONTACTS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: COPENHAGEN

Market: DENMARK

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

GREAT BELT TUNNEL

Approximate Value: 3000 M\$

Financing Source : DOM - Domestically funded

Contact : D.HORUP, CDN EMB COPEN, E.R.
CUYLITS, DRIE OTTAWA

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: COPENHAGEN

Market: DENMARK

Sector : MINE, METAL, MINERAL PROD & SRV

Sub-Sector: MINERALS AND MINERAL PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	785.00 \$M	582.00 \$M	650.00 \$M	700.00 \$M
Canadian Exports	19.00 \$M	15.00 \$M	22.00 \$M	25.00 \$M
Canadian Share of Market	3.00 %	2.63 %	3.40 %	3.50 %

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

Major Competing Countries	Market Share
AUSTRALIA	35.00 %
COLUMBIA	27.00 %
POLAND	16.00 %
UNITED STATES OF AMERICA	16.00 %
PEOPLE'S REP OF CHINA	3.00 %

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

Products/services for which there are good market prospects:

1. THERMAL COAL

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- DENMARK CHOOSES FOR POLTCL REASONS
- TO SPREAD PRCHSES OVER MANY CNTRIES

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: COPENHAGEN

Market: DENMARK

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

Activity: MAINTAIN GOOD RLTHS WITH 2 PURCH UTILITIES.

Expected Results: MAINTAIN AND INCREASE MARKET SHARE

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

Activity: ENCOUR SOURCING FM NEW CDN MINES TO EXPAND AVAILABLE TYPES

Expected Results: IF WE CAN OFFER MORE TYPES OF COAL POTENTIAL FOR 50% INCREASE IN IMPORTS FROM COA

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: COPENHAGEN

Country: DENMARK

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

	Total (\$ Million)	Canadian Share	Major Competitor Share
Current year	10290.00	0.80	35.00
One year ago	9590.00	2.00	27.00
Two years ago	9800.00	2.00	35.00

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

DIRECT INVESTMENT \$10M (WE EXPECT THIS TO BE PRIMARILY GREENFIELD SMALL BUSINESS AND JOINT VENTURE) PORTFOLIO \$150M (DOWN FROM LAST YEAR'S \$190M AS EC INTERNAL MARKET INTEGRATION HAS INCREASED RELATIVE ATTRACTIVENESS OF EC SECURITIES.

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

- U.K.
- U.S.
- F.R.G.
- SPAIN

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

- U.K. HAS BEEN MOST ACTIVE HOLDING BRITISH INVESTMENT WEEKS IN VARIOUS REGIONS WITH PARTICIPATION OF U.K. BASED INDUSTRIAL DEV'T OFFICERS/EXPERTS. HAS ALSO CONDUCTED AN ACTIVE MEDIA CAMPAIGN HIGHLIGHTING ADVANTAGES OF LOWER U.K. TAX/LABOUR COSTS PLACED IN CONTEXT OF EC MARKET INTEGRATION.
- U.S. IS THE TRADITIONAL FIRST DESTINATION FOR EXPANSION BEYOND EUROPE. SEVERAL STATES HAVE ACTIVE PROMOTION PROGRAMS BUT LITTLE IS DONE ON A NATIONAL LEVEL.

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RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: COPENHAGEN

Country: DENMARK

Competitors' activities cont'd:

- WE ARE NOT AWARE OF ANY ACTIVE PROMOTION OF INVESTMENT IN GERMANY.
- SPAIN'S PROGRAM HAS FOCUSED ON PROMOTIONS OF CERTAIN PROVINCES AND GENERAL PROVISION OF INFORMATION. THEY HAVE NOT HELD ANY MAJOR EVENTS OF WHICH WE ARE AWARE.

Compared to major competitive destinations, Canada is perceived to have

the following advantages:

- LOWER CDN TAXATION, LABOUR COST
- ACCESS TO U.S. MARKET
- LESS COSTLY LIABILITY INSURANCE THAN U.S.
- SIMILAR BUSINESS CLIMATE/ETHICS

the following constraints:

- FOR PROV. OF QUEBEC LANGUAGE IS PERCEIVED AS BARRIER
- FIRMS WHICH ESTABLISHED IN FIRA ERA STILL WARY OF RED TAPE
- U.S. REGARDED AS REAL N.A. MARKET
- CONCERN THAT CDA DOES NOT REALLY OFFER ACCESS TO U.S. MARKET

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

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

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RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: COPENHAGEN

Country: DENMARK

The mission believes that the following sectors are of greatest interest to investors in its territory/country with an assigned ranking of 1-10:

Sector	Ranking
Agriculture/Food/Fish	2
Resource Processing	10
Machinery and Equipment	4
Transportation	9
Consumer Products	5
Commercial Service	3
Computer and Communications	7
Health Care Products/Medical	1
Aerospace and Defence	6
Strategic Technologies	8

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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: COPENHAGEN

Country: DENMARK

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

	Date
Type: SEMINAR, ABROAD	
LUNCHEON FOR SENIOR BUSINESS LEADERS HOSTED BY H.O.M. Location: COPENHAGEN Invest Nature: GREENFIELD TECH. LICENSING Sector: INDUSTRIAL MACHIN, PLANTS, SERV. Cooperants: Estimated Budget: \$800.00	2/90
LUNCHEON FOR SENIOR BUSINESS LEADERS HOSTED BY H.O.M. Location: COPENHAGEN Invest Nature: GREENFIELD JOINT VENTURE Sector: AGRI & FOOD PRODUCTS & SERVICE Cooperants: Estimated Budget: \$800.00	11/89
LUNCHEON FOR SENIOR BUSINESS LEADERS HOSTED BY H.O.M. Location: COPENHAGEN Invest Nature: GREENFIELD STRAT. PARTNER Sector: EDUCATION, MEDICAL, HEALTH PRDD Cooperants: Estimated Budget: \$800.00	9/89
Type: DIRECT MAIL CAMPAIGN	
ONGOING PROGRAM OF PROVIDING INDUSTRY SPECIFIC NEWS ON CDA Location: Invest Nature: ALL Sector: MULTIPLE SECTORS Cooperants: Estimated Budget: \$3,000.00	0/00
Type: OUTCALL PROGRAM	
PROGRAM OF CALLS ON KEY MONEY MANAGERS/PENSION FUNDS Location: Invest Nature: PORTFOLIO Sector: MULTIPLE SECTORS Cooperants: PRIVATE CDN FINANCIAL FIRMS Estimated Budget: \$0.00	0/89

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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: COPENHAGEN

Country: DENMARK

Date

Type: OUTCALL PROGRAM

FOLLOW-UP CALLS ON LEADS IDENTIFIED BY BUSINESS CONTACT CDA

0/89

Location: JUTLAND

Invest Nature: GREENFIELD

JOINT VENTURE

Sector: MULTIPLE SECTORS

Cooperants:

Estimated Budget: \$2,000.00

Type: OTHER PROMOTION

BUSINESS CONTACT CANADA

2/90

Location: KOLDING, JUTLAND

Invest Nature: JOINT VENTURE

GREENFIELD

Sector: MULTIPLE SECTORS

Cooperants: PROVINCES

Estimated Budget: \$10,000.00

BUSINESS CONTACT CANADA

11/89

Location:

Invest Nature: JOINT VENTURE

GREENFIELD

Sector: MULTIPLE SECTORS

Cooperants: PROVINCES

Estimated Budget: \$10,000.00

Total estimated budget for all proposals:

\$27,400.00

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Post : COPENHAGEN

Start Date Event Name, Location & Type Sector/Post/Contact

89/10/00 COMPUTER MISSION TO NORDICS ADVANCED TECH. PROD. & SERV
MISSION OUT, INDUSTRY

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: DUBLIN

Country: IRELAND

ACCORDING TO THE IRISH CENTRAL STATISTICS OFFICE, CANADIAN EXPORTS TO IRELAND IN 1987 TOTALLED \$217 MILLION. MAJOR CANADIAN EXPORTS ARE COMPUTERS AND PARTS, TELEPHONE EQUIPMENT AND PARTS, WOODPULP, WHEAT, AIRCRAFT ENGINES AND PARTS, LUMBER, VEGETABLE WASTE, MAN-MADE FIBRES, SALMON, RAPE-SEED MEAL, POTASSIUM CHLORIDE, PEAS AND TOOLS. IRELAND IS CANADA'S 14TH LARGEST CUSTOMER. STATISTIC CANADA FIGURES SHOW CANADIAN EXPORTS REACHED \$215 MILLION IN 1988, AND THE IRISH CENTRAL STATISTICS OFFICE'S RECKONING WILL BE SUBSTANTIALLY HIGHER. A FURTHER INCREASE CAN BE FORECAST FOR 1989. CANADA IS IRELAND'S 12TH LARGEST CUSTOMER, WITH IMPORTS OF \$216 MILLION IN 1987. MAJOR IMPORTS ARE COMPUTERS AND PART, ALUMINA, LIQUEURS, AMIDE FUNCTION COMPOUNDS, COCOA OR CHOCOLATE IN POWDER FORM, HETEROCYCLIC COMPOUNDS AND OPHTHALMIC GOODS. THE INFLATION RATE AND THE BALANCE OF PAYMENTS CONTINUED TO IMPROVE AS THEY HAVE DONE EACH YEAR SINCE 1981. THIS HAS CONTRIBUTED TO THE IRISH POUND STABILITY WITHIN THE EMS. INFLATION IS ONLY 1.8%, A TWENTY-FIVE YEAR LOW. THE BALANCE OF PAYMENTS SHOULD SHOW A SURPLUS OF 700 MILLION POUNDS/STERLING COMPARED TO 263 MILLION POUNDS/STERLING IN 1987. THE SURPLUS IN THE TRADE BALANCE OF 1.3 BILLION POUNDS/STERLING SHOULD BE EVEN BIGGER IN 1988. IN THE FIRST SIX MONTHS OF 1988, TOTAL EXPORTS WENT UP BY 15%: AGRICULTURAL EXPORTS ROSE BY 16% AND INDUSTRIAL EXPORTS BY 13%. THE COUNTRY'S FOREIGN DEBT WAS OF 9.9 BILLION POUNDS/STERLING LAST JUNE. OF THE 300 MILLION POUNDS/STERLING INCREASE IN THE FOREIGN DEBT DURING THE PERIOD JANUARY-JUNE 1988, ONLY 70 MILLION POUNDS/STERLING WERE DUE TO NEW FOREIGN LOANS. THE REST WAS ACCOUNTED BY FLUCTUATIONS IN EXCHANGE RATES. THE DOMESTIC DEBT IS 18.9 BILLION POUNDS/STERLING. THE SERVICING OF THE NATIONAL DEBT AMOUNT TO 27% OF GOVERNMENT CURRENT EXPENDITURE. TOTAL GOVERNMENT SPENDING IN 1988 WILL BE 8.1 BILLION POUNDS/STERLING. THE PROCEEDS OF A TAX AMNESTY, THE BUDYANCY OF THE DOMESTIC ECONOMY AND TIGHT CONTROLS ON GOVERNMENT SPENDING WILL BRING EXCHEQUER BORROWING THIS YEAR DOWN TO 1 BILLION POUNDS/STERLING. THIS IS THE SMALLEST DEFICIT SINCE 1981. GNP INCREASED BY 4% IN 1987 DUE TO A 10% RISE IN INDUSTRIAL PRODUCTION AND A STRONG EXPORT PERFORMANCE. GNP WILL GROW BY 1 1/2% ONLY IN 1988 BECAUSE OF CUTBACKS IN GOVERNMENT EXPENDITURES AND WILL TOTAL ABOUT 18.3 BILLION POUNDS/STERLING. THE FAVOURABLE BALANCE OF PAYMENTS POSITION HAS BROUGHT INCREASED LIQUIDITY INTO THE MARKETS WHICH IN TURN PUSHED INTEREST RATES DOWN. PRIME OVERDRAFT RATE IN COMMERCIAL BANKS HAS DECLINED BY FIVE PERCENTAGE POINTS AND AT THE END OF 1987 REACHED 9%, ITS LOWEST NOMINAL RATE IN TEN YEARS. THE RATE HAS CONTINUED TO DECLINE THIS YEAR. UNEMPLOYMENT, ALTHOUGH LOWER THAN LAST YEAR, REMAINS HIGH AT 17.9% AND REPRESENTS, ALONG WITH SERVICING OF THE NATIONAL DEBT, THE MAJOR HURDLES TO ECONOMIC RECOVERY. THE SITUATION IS BETTER THAN IT WAS BUT STILL REMAINS FRAGILE. IT WILL KEEP IMPROVING IN 1989 IF THE GOVERNMENT CONTINUES TO REDUCE ITS EXPENDITURES AND IF EXPORTS CONTINUE TO GROW, AS THEY HAVE DONE OVER THE PAST YEARS.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 EXPORT PROMOTION PRIORITIES

Mission: DUBLIN

Country: IRELAND

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

1. TRANSPORT SYS,EQUIP,COMP,SERV.
TO BUILD ON THE BREAKTHROUGH BY DEHAVILLAND RE ORDERS FOR 5 DASH 8 (SERIES 100).
2. ADVANCED TECH. PROD. & SERV
IRELAND HAS A WELL DEVELOPED HI-TECH INDUSTRY. CANADIAN CAPABILITIES ARE READILY RECOGNIZED IN AREAS SUCH AS TELECOMMUNICATIONS, ELECTRONICS, COMPUTER (HARDWARE AND SOFTWARE) AND BROADCASTING EQUIPMENT.
3. AGRI & FOOD PRODUCTS & SERVICE
THE LEVEL OF (IRISH AND CANADIAN) INTEREST IN POSSIBLE CO-OPERATION INCLUDING LICENSING AND JOINT VENTURES.
4. FISHERIES,SEA PRODUCTS & SERV.
SEE 3. VISITS TO AND FROM NEWFOUNDLAND HAVE SUGGESTED MUTUAL INTEREST IN CO-OPERATION.

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

1. TRANSPORT SYS,EQUIP,COMP,SERV.
2. ADVANCED TECH. PROD. & SERV
3. FOREST PRODUCTS,EQUIP,SERVICES
4. GRAINS AND OILSEEDS

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DUBLIN

Market: IRELAND

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: ANIMAL,POULTRY BREEDING STOCK

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	30.00 \$M	35.00 \$M	38.00 \$M	40.00 \$M
Canadian Exports	0.10 \$M	0.10 \$M	0.30 \$M	0.50 \$M
Canadian Share of Market	0.30 %	0.30 %	0.80 %	1.20 %

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

Major Competing Countries	Market Share
IRELAND	60.00 %
UNITED KINGDOM	20.00 %
FRANCE	10.00 %
UNITED STATES OF AMERICA	2.00 %
DENMARK	2.00 %
NEW ZEALAND	1.00 %

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

Products/services for which there are good market prospects:

1. BOVINE SEMEN
2. BOVINE EMBRYOS
3. BREEDING LIVESTOCK
4. POULTRY BREEDING STOCK

Factors contributing to current successful Canadian exports:

- Trade Fair activity
- Strong sectoral capability in Canada
- NEW AGGRESSIVE LOCAL
- AGENT

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Restrictive standards
- ANIMAL HEALTH
- REGULATIONS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DUBLIN

Market: IRELAND

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

Activity: EXPLORE EMBRYO TRANSFER MARKET
Expected Results: NEW MARKET SEGMENT

Activity: LIAISE WITH DEPT OF AGRICULTURE RE ANIMAL HEALTH
Expected Results: MARKET ACCESS

Activity: ASSIST AGENT AT TRADE SHOWS AND RELATED EVENTS
Expected Results: IMPROVED EXPOSURE

Activity: EXPLORE MARKET FOR POULTRY STOCK

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

Activity: MISSION TO ONTARIO AND/OR BRITISH COLUMBIA
Expected Results: INCREASED SEMEN ORDERS

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DUBLIN

Market: IRELAND

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: SEMI & PROCESSED FOOD & DRINK

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	550.00 \$M	600.00 \$M	650.00 \$M	700.00 \$M
Canadian Exports	1.00 \$M	1.00 \$M	1.50 \$M	2.00 \$M
Canadian Share of Market	0.10 %	0.10 %	0.20 %	0.20 %

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

Major Competing Countries	Market Share
IRELAND	55.00 %
UNITED KINGDOM	25.00 %
FRANCE	5.00 %
ITALY	2.00 %
NETHERLANDS	2.00 %
DENMARK	2.00 %

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

Products/services for which there are good market prospects:

1. JOINT VENTURES/LICENSING
2. DRIED PEAS/BEANS
3. FROZEN/CANNED CORN
4. BAKERY PRODUCTS
5. BEER
6. WHISKEY
7. HONEY
8. CHEESE
9. FOOD INGREDIENTS
10. WINE
11. MUSTARD FLOUR
12. MAPLE SYRUP

Factors contributing to current successful Canadian exports:

- Import duties are moderate
- Fairs and Missions support
- Trade Fair activity

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DUBLIN

Market: IRELAND

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Lack of promotion and advertising
- Market prospects have not been adequately explored

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

Activity: FOLLOW UP ON SIAL FROZEN FOOD SEMINAR
Expected Results: EXCHANGE OF TECHNOLOGY

Activity: LIAISON WITH FOOD RESEARCH CENTRES IN IRELAND AND CANADA
Expected Results: INCREASED CO-OPERATION

Activity: MAINTAIN LINKS WITH AGENTS AND BUYERS
Expected Results: NEW ORDERS

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

Activity: MISSION TO ANUGA
Expected Results: EXCHANGE OF TECHNOLOGY/NEW ORDERS

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

Activity: REPORT ON 1992 RE FOOD PRODUCTS
Expected Results: INCREASED AWARENESS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DUBLIN

Market: IRELAND

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: FOOD HANDLING, PROCESSING EQUIP

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	25.00 \$M	28.00 \$M	30.00 \$M	33.00 \$M
Canadian Exports	0.10 \$M	0.10 \$M	0.10 \$M	0.20 \$M
Canadian Share of Market	0.40 %	0.40 %	0.30 %	0.60 %

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

Major Competing Countries	Market Share
UNITED KINGDOM	60.00 %
ITALY	8.00 %
DENMARK	5.00 %
IRELAND	3.00 %
NETHERLANDS	2.00 %
GERMANY WEST	2.00 %

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

Products/services for which there are good market prospects:

1. FOOD PROCESSING EQUIPMENT
2. ABBATOIR EQUIPMENT
3. FOOD HYGIENE EQUIPMENT

Factors contributing to current successful Canadian exports:

- Import duties are moderate

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Market prospects have not been adequately explored

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DUBLIN

Market: IRELAND

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

Activity: APPROACH MAJOR PROCESSORS
Expected Results: INCREASED AWARENESS

Activity: LINK UP WITH IRISH PARTICIPANTS AT SIAL SEMINAR
Expected Results: INCREASED AWARENESS

Activity: SPECIAL PROJECT/POULTRY
Expected Results: EQUIPMENT/TURNKEY SALE

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DUBLIN

Market: IRELAND

Sector : FISHERIES, SEA PRODUCTS & SERV.

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	86.00 \$M	89.00 \$M	89.00 \$M	91.00 \$M
Canadian Exports	3.00 \$M	3.00 \$M	4.00 \$M	5.00 \$M
Canadian Share of Market	3.00 %	3.00 %	4.00 %	5.00 %

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

Major Competing Countries	Market Share
IRELAND	60.00 %
UNITED KINGDOM	20.00 %
UNITED STATES OF AMERICA	5.00 %
THAILAND	4.00 %
DENMARK	2.00 %
GERMANY WEST	1.00 %

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

Products/services for which there are good market prospects:

1. JOINT VENTURE/LICENSING
2. CANNED SALMON
3. FROZEN SALMON
4. PROCESSING MACHINERY
5. HARVESTING MACHINERY

Factors contributing to current successful Canadian exports:

- Import duties are moderate
- Canada is one of few sources of supply
- Strong sectoral capability in Canada

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Restrictive quotas
- Limited appreciation/understanding of distribution system

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DUBLIN

Market: IRELAND

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

Activity: FOLLOW UP RE SIAL BREAKFAST SEMINAR
Expected Results: TECHNOLOGY EXCHANGE

Activity: COOPERATE WITH IRISH SEA FISHERIES BOARD
Expected Results: INCREASED INDUSTRY COOPERATION

Activity: EXAMINE MARKET POTENTIAL FOR HARVESTING/PROCESSING EQUIPMENT
Expected Results: NEW MARKET POTENTIAL/SALES

Activity: FOLLOW UP RE IRISH VISITORS TO WURLD SYMP.ON FISHING GEAR
Expected Results: NEW MARKET POTENTIAL/SALES

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

Activity: TECHNOLOGICAL MISSIONS TO AND FROM ST. JOHN'S, NEWFOUNDLAND
Expected Results: JOINT VENTURE AND/OR LICENSING

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

Activity: ASSESSMENT OF FISHERY SECTOR RE 1992
Expected Results: INCREASED AWARENESS RE COMPETITION

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DUBLIN

Market: IRELAND

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1950.00 \$M	2100.00 \$M	1900.00 \$M	2000.00 \$M
Canadian Exports	55.00 \$M	70.00 \$M	75.00 \$M	80.00 \$M
Canadian Share of Market	3.00 %	3.50 %	4.00 %	4.00 %

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

Major Competing Countries

Market Share

UNITED KINGDOM	35.00 %
IRELAND	20.00 %
UNITED STATES OF AMERICA	8.00 %
JAPAN	6.00 %
GERMANY WEST	4.00 %
NETHERLANDS	4.00 %

Current Status of Canadian

exports in this sector/subsector: Well established and growing

Products/services for which there are good market prospects:

1. COMPUTERS AND PARTS
2. TELECOM EQUIPMENT AND PARTS
3. CABLE TV EQUIPMENT/CONSULTING
4. ELECTRONIC COMPONENTS
5. INSTRUMENTATION
6. SOFTWARE
7. REMOTE SENSING SERVICES
8. ANTENNAS

Factors contributing to current successful Canadian exports:

- Import duties are moderate
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Provincial export promotion
- Competitive pricing
- Strong sectoral capability in Canada
- Willingness of exporters to invest/joint venture in territory

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DUBLIN

Market: IRELAND

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Restrictive standards

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

Activity: EXAMINE SCOPE FOR TECHNOLOGY TRANSFER
Expected Results: JOINT VENTURES AND/OR LICENSING

Activity: REGULAR CONTACT WITH CANADIAN SUBSIDIARIES BRANCH PLANTS
Expected Results: INCREASED IMPORTS OF COMPONENTS

Activity: MONITOR INTRODUCTION OF MMDS AND RELATED CABLE TV NEEDS
Expected Results: SALES OF EQUIPMENT AND CONSULTANCY

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

Activity: HIGH TECHNOLOGY MISSION TO TORONTO/MONTREAL
Expected Results: TECHNICAL CO-OPERATION

Activity: ATTEND HIGH TECH CONFERENCE OTTAWA 1989
Expected Results: NEW HIGH TECH CONTACTS

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DUBLIN

Market: IRELAND

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

NEW VIDEOTEX PROJECT

Approximate Value: 0 M\$
Financing Source : OTHER
Contact : EMBASSY

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DUBLIN

Market: IRELAND

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: AEROSPACE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	35.00 \$M	88.00 \$M	95.00 \$M	150.00 \$M
Canadian Exports	4.00 \$M	10.00 \$M	19.00 \$M	40.00 \$M
Canadian Share of Market	11.00 %	11.00 %	20.00 %	26.00 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	60.00 %
UNITED KINGDOM	9.00 %
NETHERLANDS	5.00 %
FRANCE	4.00 %

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

Products/services for which there are good market prospects:

1. AIRCRAFT
2. AIRCRAFT ENGINES
3. AIRCRAFT PARTS
4. AVIONICS EQUIPMENT

Factors contributing to current successful Canadian exports:

- Import duties are moderate
- Aggressive marketing
- Fairs and Missions support
- Trade Fair activity
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- Competitive Canadian financing

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DUBLIN

Market: IRELAND

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

Activity: REGULAR FOLLOW UP WITH AER LINGUS
Expected Results: OVERCOME FOKKER COMPETITION

Activity: REGULAR FOLLOW UP WITH GUINNESS PEAT AVIATION RE"OPTIONS"
Expected Results: 5 DASH 8'S

Activity: REGULAR FOLLOW UP WITH RYANAIR
Expected Results: PURCHASE OF DASH 8.

Activity: FOLLOW UP WITH IRISH AIR CORPS RE SPECIAL DASH 8 (TRITON)
Expected Results: SALE OF TWO PATROL TRITONS

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

Activity: PARIS AIR SHOW
Expected Results: CONFIRM OPTIONS OR NEW ORDERS

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

Activity: FLIGHT DEMONSTRATION
Expected Results: CONFIRMED OR NEW ORDERS

Activity: EXPLORE LOCAL CONTENT ASPECT
Expected Results: UNKNOWN

Activity: APPROACH DEPT OF TRANSPORT RE REGIONAL AIRPORT MODERNIZATION
Expected Results: SALE OF AVIONICS RELATED EQUIPMENT

Activity: LIAISON WITH BACKERS OF DUBLIN STOLPORT
Expected Results: LONG TERM POSSIBILITIES

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DUBLIN

Market: IRELAND

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

REGIONAL AIRPORT MODERNIZATION Approximate Value: 10 M\$
Financing Source :
Contact : POST

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: HELSINKI

Country: FINLAND

FINLAND ENJOYS AN ACTIVE MARKET ECONOMY FOR WHICH FOREIGN TRADE IS CRUCIAL. IN 1988, FINLAND EXPORTED GOODS AND SERVICES VALUED AT \$ CAN 32 BILLION TO MAJOR TRADE PARTNERS: E.E.C., ACCOUNTING FOR 44%, EFTA 20% AND USSR FOR 15% OF THIS TOTAL.

MAIN ECONOMIC INDICATORS.

GDP WENT UP BY 3.2% IN 88 AND ESTIMATES FOR 89 SHOW SLOWER PROGRESS AT 2%. FINLAND REMAINS AMONG THE TENTH WEALTHIEST COUNTRIES IN THE WESTERN WORLD WITH A PER CAPITA OF GDP OF \$CAN 22,000. 1988 GROWTH HAS BEEN SUSTAINED BY A STRONG DOMESTIC DEMAND, STIMULATED BY WAGE INCREASES AND TAX BREAKS AND GOOD EXPORT PERFORMANCE. THIS DESPITE THE CONTINUOUS SLOWDOWNS OF SALES TO THE SOVIET UNION FROM 20% IN 86 TO 15% IN 88. GLOBAL EXPORTS HAVE BEEN SUCCESSFULLY COMPENSATED BY PROGRESS ON WESTERN EUROPEAN MKT SUCH AS WEST GERMANY, SWEDEN, FRANCE, U.K. AND ITALY. THIS SUCCESS SHOWS THE PRAGMATISM AND EFFICIENCY OF FINNISH EXPORTERS IN SECURING GOOD POSITIONS ON THESE MARKETS BEFORE THE CHANGES TO BE BROUGHT BY THE UNIFORMISATION OF THE E.E.C. ARE IN FORCE. IN 87 FINLAND MANAGED A RESPECTABLE \$CAN 550 MILLION BALANCE OF TRADE SURPLUS, WHICH SHOULD REACH \$ CAN 700 MILLION IN 1988. FOR THE SAME PERIOD THE CURRENT ACCOUNT HAS SHOWN A DEFICIT OF \$ CAN 2.5 BILLION WITH NO EXPECTATION TO DECREASE IN 1988 AND 89, HOWEVER, IT STILL REMAINS AT A MANAGEABLE LEVEL OF AROUND 3 % OF GDP. IN ADDITION TO STRONG IMPORTS GROWTH, INVISIBLE SUCH AS INCREASED DEBT SERVICE AND FINNISH TRAVEL ABROAD ARE MAJOR COMPONENTS OF THIS DEFICIT. INDUSTRIAL RESTRUCTURING CONTINUES AND INVOLVES TAKEOVERS OF SMALLER FIRMS BY LARGER CONGLOMERATES, HIGH LEVELS OF INVESTMENT ABROAD AND GROWING UNEMPLOYMENT (CURRENTLY 5.0%). THERE IS ALSO INCREASED EMPHASIS ON HIGH TECHNOLOGY, RESEARCH AND DEVELOPMENT AND CO-OPERATION WITH OTHER COUNTRIES. CANADA IS A FAVOURED TARGET FOR FINNISH INVESTORS (MOST OF THE TOP INDUSTRIAL 20 COMPANIES HAVE OPERATION IN CANADA) AND A MARKET DESIRE FOR TECHNOLOGICAL CO-OPERATION HAS BECOME EVIDENT. TRADE WITH CANADA.

THE PROSPECTS FOR INCREASING TRADE BETWEEN CANADA AND FINLAND ARE EXCELLENT. STATISTICS CANADA REPORTS THAT OUR EXPORTS TO FINLAND INCREASED FROM CDN DOLLARS 95.8 M IN 1987 TO CDN DOLLARS 170 M IN 1988. (CDN DOLLARS 176M ACCORDING TO FINNISH STATISTICS WHICH INCLUDE DOLLARS 12.5 M IN CDN ZINC SALES BUT NOT A DLRS. 48 M AIRCRAFT OWNED BY A CDN CO.). CDN EXPORTS OF MFTRG PRODS ROSE CONSIDERABLY IN 88 AND SHOULD CONTINUE DOING SO AS THE IMPACT OF THE LOWER \$ BECOMES ENTRENCHED. WE ALREADY SEE THAT OPPORTUNITIES IN INFORMATICS, ELECTRONICS, LEISURE PRODUCTS AND SPECIALTY SEA FOODS ARE NOTED BY CANADIAN EXPORTERS AS 1988 STATISTICS SHOW AN INCREASE OF 42% ON THE SAME PERIOD LAST YEAR. STRONG DOMESTIC DEMAND FOR THESE PRODUCTS IS EXPECTED TO GO IN 89-90. IT IS UP TO CANADIAN EXPORTERS TO TAKE ADVANTAGE OF IT.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 EXPORT PROMOTION PRIORITIES

Mission: HELSINKI

Country: FINLAND

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

1. ADVANCED TECH. PROD. & SERV
RAPIDLY EXPANDING MARKET IN FINLAND. HIGH EXPERTISE AND SUBSTANTIAL INTEREST ON PART OF CANADIAN SUPPLIERS.
2. FISHERIES, SEA PRODUCTS & SERV.
HIGH PER CAPITA CONSUMPTION OF FISH. CANADA RANK FIFTH LARGEST SOURCE OF FISH FOR FINLAND. EXPANDING DEMAND FOR SPECIALTY SEA PRODUCTS AND FISH (WHITEFISH).
3. CONSUMER PRODUCTS & SERVICES
FREQUENT ENQUIRIES FROM CANADIAN EXPORTERS MARKET. SPORTING GOODS (HOCKEY EQUIPMENT) STABLE. CANADIAN LABEL WELL RECEIVED BY CONSUMERS.
4. DEFENCE PROGRAMS, PRODUCTS, SERV
INCREASED AWARENESS OF THE FINNISH MARKET BY CANADIAN SUPPLIERS.

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

- | | |
|-------------------------------------|--------------------------------|
| 1. MINE, METAL, MINERAL PROD & SRV | 4. ADVANCED TECH. PROD. & SERV |
| 2. FOREST PRODUCTS, EQUIP, SERVICES | |
| 3. CHEM PROD & PETROCHEM, EQP, SERV | |

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: HELSINKI

Market: FINLAND

Sector : FISHERIES, SEA PRODUCTS & SERV.

Sub-Sector: FISH & SHELLFISH & OTHER PROD

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	170.00 \$M	180.00 \$M	190.00 \$M	200.00 \$M
Canadian Exports	3.60 \$M	4.10 \$M	5.50 \$M	7.00 \$M
Canadian Share of Market	2.10 %	2.30 %	2.80 %	3.50 %

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

Major Competing Countries Market Share

FINLAND	75.00 %
NORWAY	12.00 %
ICELAND	3.00 %

Products/services for which there are good market prospects:

1. WHITEFISH
2. SHRIMPS
3. LOBSTERS

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- Fairs and Missions support
- Trade Fair activity
- Canada is one of few sources of supply
- VALUE CRNCY FLUCTUATION
- IN FAVOUR OF CAD. \$.

Factors for Canadian exports not reaching market potential:

- Restrictive quotas
- Restrictive standards

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: HELSINKI

Market: FINLAND

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

Activity: FISHERIES PRODUCTS IN FINLAND REPORT
Expected Results: BETTER KNOWLEDGE OF DEMAND AND MARKET.

Activity: CONTINUED DEVELOPMENT OF CENTRAL NETWORK & DISTR OF INFO
Expected Results: MAINTAIN GROWTH OF CDN SALES OF SHRIMPS FROM 2 TONS IN 1986 TO 44.6 TONS IN 1988.

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

Activity: CDN SPECIALTY SEAFOOD INFO DAY INCLUDING "DEGUSTATION"
Expected Results: RAISE INTEREST OF IMPORTERS AND CATERERS IN CDN PRODUCTS.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: HELSINKI

Market: FINLAND

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	110.00 \$M	120.00 \$M	130.00 \$M	130.00 \$M
Canadian Exports	1.50 \$M	1.50 \$M	2.00 \$M	2.50 \$M
Canadian Share of Market	1.30 %	1.00 %	1.50 %	1.90 %

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

Major Competing Countries

Market Share

UNION OF SOVIET SUC REP	50.00 %
UNITED KINGDOM	20.00 %
FRANCE	10.00 %
UNITED STATES OF AMERICA	10.00 %
SWEDEN	5.00 %

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

Products/services for which there are good market prospects:

1. MARINE
2. ELECTRICAL & ELECTRONIC
3. SECURITY PRODUCTS

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Import duties are moderate
- Aggressive marketing
- PEMD support
- Strong sectoral capability in Canada

Factors for Canadian exports not reaching market potential:

- LOCAL AGENTS
- REQUIRED
- INFREQ. VISITS W. AGENTS & REPS.
- AGENT NOT LOCATED IN FINLAND.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: HELSINKI

Market: FINLAND

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

Activity: CONTINUE TO BUILD UP CONTACTS IN FINNISH DEFENCE FORCES
Expected Results: BETTER KNOWLEDGE OF FINNISH REQUIREMENTS.

Activity: LOCATE NEW POTENTIAL AGENTS FOR CDN DEFENCE PRODS SUPPLIERS.
Expected Results: INCREASED PRESENCE OF CDN DEFENCE PROD: ENSURE THAT CDN CO. ARE INVITED TO BID ON AT LEAST 2 NEW PROJECTS.

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

Activity: DEFENCE PRODUCTS AND RELATED SERVICES REPORT.
Expected Results: IMPROVE KNOWLEDGE OF FINNISH MARKET IN CANADA.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: HELSINKI

Market: FINLAND

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: BROADCASTING, INC. CABLE TV

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	554.00 \$M	657.00 \$M	700.00 \$M	750.00 \$M
Canadian Exports	0.30 \$M	0.20 \$M	1.30 \$M	1.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.10 %	0.10 %

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

Major Competing Countries	Market Share
JAPAN	30.30 %
SWEDEN	15.10 %
GERMANY WEST	13.70 %
UNION OF SOVIET SOC REP.	6.20 %
UNITED KINGDOM	4.40 %
DENMARK	4.10 %

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

Products/services for which there are good market prospects:

1. CATV EQUIPMENT
2. CATV SERVICES

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Import duties are moderate
- PEMD support
- Fairs and Missions support
- Strong sectoral capability in Canada

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: HELSINKI

Market: FINLAND

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

Activity: CONTINUE REP ON FINNISH TV & CATV IND. TO CDN SUPPLIERS
Expected Results: INCREASE CDN FIRMS KNOWLEDGE ON FINNISH MARKET WHICH IS MOVING VERY FAST.

Activity: DEVELOP CONTACT NETWORK
Expected Results: FIND FURTHER OPPORT FOR CDN FIRMS WHOSE EXP TO FINLAND INCR BY +637% DURING JAN-SEPT 88.

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

Activity: ORGANIZE CATV INDUSTRIES MISSION TO CANADA
Expected Results: MAINTAIN GROWTH MOMENTUM SETTING 89 INCREASE AT 10%.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: HELSINKI

Market: FINLAND

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: COMPUTERS HARD/SOFTWARE & COMP

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	764.00 \$M	834.00 \$M	920.00 \$M	1020.00 \$M
Canadian Exports	3.40 \$M	4.70 \$M	5.50 \$M	6.10 \$M
Canadian Share of Market	0.40 %	0.50 %	0.60 %	0.60 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	33.10 %
JAPAN	13.40 %
UNITED KINGDOM	12.70 %
GERMANY WEST	9.50 %

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

Products/services for which there are good market prospects:

1. COMPUTER HARDWARE SYSTEMS
2. COMPUTER PERIPHERALS AND SOFTWARE
3. REMOTE SENSING

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Market prospects have not been adequately explored

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: HELSINKI

Market: FINLAND

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

Activity: EXPAND POST DATA BASE & UPDATE MARKET REPORT.
Expected Results: MORE PRECISE ASSISTANCE TO CANADIAN EXPORTERS.
MORE FIRMS REPRESENTED IN FINLAND.

Activity: CONTINUE MAILINGS OF CDN INFORMATICS PUBLIC TO FINNISH IMPOR
Expected Results: INCREASED AWARENESS IN FINLAND OF CANADIAN EXPERTISE AND
PRODUCTS.

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

Activity: HARDWARE/SOFTWARE MISSION TO FINLAND.
Expected Results: FOLLOW-UP ON LAST YEAR'S MISSIONS AND INCREASE MARKET GAIN.

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: HELSINKI

Market: FINLAND

Sector : ELECTRONICS EQUIP. & SERV

Sub-Sector: PRODUCTS & COMPONENTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	298.00 \$M	350.00 \$M	350.00 \$M	380.00 \$M
Canadian Exports	3.00 \$M	2.00 \$M	2.00 \$M	2.50 \$M
Canadian Share of Market	1.00 %	0.60 %	0.60 %	0.60 %

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

Major Competing Countries

Market Share

GERMANY WEST	29.80 %
UNITED STATES OF AMERICA	16.20 %
UNITED KINGDOM	10.10 %
JAPAN	8.30 %
SWEDEN	7.80 %
SWITZERLAND	6.30 %

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

Products/services for which there are good market prospects:

1. ELECTRONIC PRODUCTS & COMPONENTS

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Market prospects have not been adequately explored

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: HELSINKI

Market: FINLAND

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

Activity: CONTINUE EXPANDING POSTS DATABASE.

Expected Results: UP-TO DATE CONTACT INFORMATION TO CANADIAN FIRMS

Activity: CONTINUE MAILING OF CDN ELECTRONICS PUBLICATIONS

Expected Results: IMPROVE FINNISH IMPORTERS KNOWLEDGE OF CANADIAN FIRMS AND PRODUCTS.

Activity: CONTINUE REGULAR ATTENDANCE OF FINN. & EUROPEAN TRADE FAIRS

Expected Results: ESTABLISH BETTER CONTACTS WITH FINNISH FIRMS SEEKING NEW PRODUCTS.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: HELSINKI

Market: FINLAND

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: LEISURE PROD. TOOLS HARDWARE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	36.00 \$M	44.00 \$M	50.00 \$M	55.00 \$M
Canadian Exports	1.00 \$M	1.70 \$M	2.00 \$M	2.50 \$M
Canadian Share of Market	2.80 %	3.80 %	4.00 %	4.50 %

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

Major Competing Countries

Market Share

AUSTRIA	19.00 %
FRANCE	13.00 %
TAIWAN	10.00 %
GERMANY WEST	9.00 %
SWEDEN	8.00 %
ITALY	6.00 %

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

Products/services for which there are good market prospects:

1. SPORTING GOODS

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Import duties are moderate
- Aggressive marketing
- Fairs and Missions support
- CURRENCY VALUE

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: HELSINKI

Market: FINLAND

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

Activity: INSTORE PROMOTION. CDN SPORTING GOODS USING LOCAL ATHLETES
Expected Results: GREATER EXPOSURE. INCREASED SALES BY 5%.

Activity: ANNUAL DISPLAY OF SPORTING GOODS & RECEIPT FROM MAJOR DISTRIBUTOR.
Expected Results: MAINTAIN MARKET SHARE IN HOCKEY EQUIPMENT AND DEVELOP NEW MARKET.

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

Activity: EXPLORE VIABILITY OF NEW PRODUCTS ON FINNISH MARKET
Expected Results: DIVERSIFY FROM HOCKEY EQUIPMENT. BENEFIT FROM GOOD PERCEPTION OF CANADIAN LABEL BY CONSUMERS.

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RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: HELSINKI

Country: FINLAND

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

	Total (\$ Million)	Canadian Share	Major Competitor Share
Current year	1000.00	2.10	43.00
One year ago	1147.00	5.10	23.00
Two years ago	2121.00	2.50	30.00

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

50 MILLION

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

- SWEDEN
- WEST GERMANY
- BENELUX
- DENMARK
- U.S.A.
- FRANCE

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

- INFORMATION SESSION SEMINAR
- LIMITED NATIONAL MARKET IN FINLAND, THE TIGHTENING OF E.E.C. ARE PRESSING FINNISH CORPORATIONS TO INTERNATIONALIZE THEIR ACTIVITIES. PRIORITY MARKETS ARE SWEDEN AND E.E.C.

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: HELSINKI

Country: FINLAND

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

- ACCESS TO AMERICAN MARKET
- POSITIVE IMAGE, AFFINITIES

the following constraints:

- PRIORITY FOR FINNISH COMPANIES IS THE E.E.C.
- LACK OF TAKEOVER TARGET

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

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

The mission believes that the following sectors are of greatest interest to investors in its territory/country with an assigned ranking of 1-10:

Sector	Ranking
Resource Processing	1
Machinery and Equipment	2
Consumer Products	3
Health Care Products/Medical	4

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: HELSINKI

Country: FINLAND

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

Date

Type: COMMUNICATIONS EXHIBIT

LIGHT WEIGHT EXHIBIT INVOLVING GOOD QUALITY MATERIAL
(SLIDES) FOR COMMUNICATIONS PROGRAM

0/89

Location: HELSINKI-TURKU

Invest Nature: ALL

Sector: FISHERIES, SEA PRODUCTS & SERV.

Cooperants:

Estimated Budget: \$5,000.00

Type: SEMINAR, ABROAD

WORKSHOP SESSIONS ON DOING BUSINESS IN CANADA

0/89

Location:

Invest Nature: ALL

Sector: FISHERIES, SEA PRODUCTS & SERV.

Cooperants: KOP BANK FINNISH EXPORT INSTITUTE
PROV. GOV'T BC. QUE. ONT.

Estimated Budget: \$1,000.00

Type: MISSION IN, TO INDUSTRY

IN CONJUNCTION WITH FINNISH EXPORT INSTITUTE TRAINING WORK-
SHOP ON BUSINESS IN CANADA

3/89

Location:

Invest Nature: ACQUISITION

STRATEGIC PART.

Sector: FISHERIES, SEA PRODUCTS & SERV.

Cooperants: FINNISH EXPORT INSTITUTE

Estimated Budget: \$10,000.00

Type: DIRECT MAIL CAMPAIGN

SECTOR OF STUDIES PRODUCED BY INVEST CDA SENT TO SPECIFIC
COMPANIES AS A FOLLOW UP TO OUR GENERAL

0/89

Location:

Invest Nature: ALL

Sector: FISHERIES, SEA PRODUCTS & SERV.

Cooperants: INV. CDA

Estimated Budget: \$1,000.00

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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: HELSINKI

Country: FINLAND

Date

Type: OUTCALL PROGRAM

AMBASSADOR CORPORATE LIAISON PROGRAM

0/89

Location: HELSINKI, TURKU, TAMP.

Invest Nature: ACQUISITION

STRATEGIC PART.

Sector: FISHERIES, SEA PRODUCTS & SERV.

Cooperants: MAIN FINNISH CORPORATION

Estimated Budget: \$1,500.00

Total estimated budget for all proposals: \$18,500.00

89/06/12 RP-A10 PEMD - Government Initiated Activities 1989 177A)

Post : HELSINKI

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Post/Contact</u>
89/04/18	ELTEK/ELCOM - INFORMATICS SHOW HELSINKI, FINLAND INFO BOUTH, ONLY	ADVANCED TECH. PROD. & SERV MCCALLUM/SCHROETER

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: LISBON

Country: PORTUGAL

ACCORDING TO THE ANALYSIS OF THE BANK OF PORTUGAL, ECONOMIC GROWTH WAS AGAIN STRONG IN 1987. GDP GREW BY 4.7% (4.3%*). INTERNAL DEMAND GAINED 9.5% (8.5%) BUT EXTERNAL DEMAND FELL BY 5% (4.5% DECLINE). PRIVATE CONSUMPTION WAS UP BY 6.8% (7.0%) WHILE PUBLIC SECTOR CONSUMPTION GROWTH WAS KEPT AT 1.7% (1.6%). GROSS FIXED CAPITAL FORMATION GREW BY 19.5% (9.5%). THE BANK AGAIN WARNED PORTUGUESE AUTHORITIES THAT SUCH INTERNAL DEMAND GROWTH RATES CANNOT BE SUSTAINED IN THE MEDIUM TERM BECAUSE THEY EXCEED, BY A SIGNIFICANT MARGIN, THE RESPONSE CAPACITY OF INTERNAL SUPPLY. THIS IMBALANCE HAS UNTIL NOW AFFECTED MAINLY THE TRADE BALANCE, WHICH CONTINUED TO DETERIORATE, AND AS EXTERNAL FACTORS HAVE BEEN RELATIVELY FAVOURABLE IT HAS BEEN POSSIBLE TO KEEP INFLATION MORE OR LESS IN CHECK. AT 31 DEC 87 THE CPI HAD GROWN BY 9.4% (11.7% IN 86, 19.3% IN 85; 29.3% IN 84). THE BALANCE ON CURRENT ACCOUNTS WAS THE EQUIVALENT OF US \$648 MILLION (US \$1,159 MILLION) OR 1.8% OF GDP (3.9%). THE MERCHANDISE TRADE DEFICIT OF US \$3.4 BILLION (US \$1.7 BILLION) WAS OFFSET BY, AMONG OTHERS, A SURPLUS IN TOURISM OF US \$1,725 MILLION (US \$1,203 MILLION) AND BY EMIGRANT REMITTANCES OF US \$3,247 MILLION (US \$2,580 MILLION). FINANCIAL FLOWS WITH EEC WERE ALSO POSITIVE AS PORTUGAL "PAID IN" US \$398 MILLION AND "RECEIVED" US \$711 MILLION. ECONOMIC PERFORMANCE REFLECTED FAVOURABLY ON THE LABOUR MARKET. OVERALL EMPLOYMENT INCREASED BY 2.6% (0.2%) AND UNEMPLOYMENT DECLINED TO 7.0% (8.4%). PRIVATE SECTOR SALARY INCREASES AVERAGED 11.8% (17%). AT YEAR END, FOREIGN DEBT EXPRESSED IN ESCUDOS HAD FALLEN SLIGHTLY TO 2,358 BILLION (2,382 BILLION) ALTHOUGH THE US\$ EQUIVALENT HAD GROWN SIGNIFICANTLY FROM US \$16.3 BILLION TO US \$18.2 BILLION. BY MID-1988, THE DOWNWARD TREND IN CPI SHOWED SIGNS OF REVERSING ITSELF, OECD REPORTED THAT WITH A 1.4% INCREASE IN AUGUST, THE 12-MONTH INDEX HAD INCREASED BY 9.8%. THE EXTERNAL FACTORS (INTERNATIONAL INTEREST RATES, EXCHANGE RATES, OIL PRICES) WHICH HAD SIGNIFICANTLY CONTRIBUTED TO PORTUGUESE ECONOMIC HEALTH IN 85-87, NOW THREATENED IT IN 88 AND 89. THE GOVERNMENT'S OBJECTIVES (INFLATION CONTROL, EMPLOYMENT, MODERNIZATION, DEVELOPMENT, BUDGET DEFICIT CUTS) SEEMED TO ESCAPE ITS REACH. IN RESPONSE, THE GOVERNMENT ADOPTED MEASURES TO REDUCE THE RATE OF GROWTH IN INTERNAL CONSUMPTION, AS IT EXPECTED THAT BUDGETARY DEFICITS RELATIVE TO GDP WOULD CONTINUE TO DECLINE (FROM 9.5% IN 1987 TO 7.5% IN 1989). DESPITE THE MID-88 TREND REVERSAL, THE GOVERNMENT MAINTAINED ITS FORECAST OF INFLATION RATES CLOSER TO THE EEC AVERAGE. THE EUROPEAN SINGLE MARKET IS THE OBJECT OF MANY OF PORTUGAL'S CONCERNS. PREOCCUPATION WITH ACCESSION AND ITS BENEFITS HAS BEEN REPLACED BY THE CHALLENGES OF INTEGRATION INTO AN EEC WITH DOMINANT FIGURES - FRG, UK, FRANCE, ITALY, AND "THE NEW GIANT" SPAIN - AND SMALL, PERIPHERAL PLAYERS - IRELAND, GREECE, AND OF COURSE PORTUGAL ITSELF. SUCH CONCERNS HAVE ONLY JUST BEGUN TO BE FORMULATED.

* UNLESS OTHERWISE INDICATED, FIGURES IN BRACKETS ARE VALUES FOR 1986.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 EXPORT PROMOTION PRIORITIES

Mission: LISBON

Country: PORTUGAL

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

1. GRAINS AND OILSEEDS

CEREALS MARKET WILL BE FREE FROM GOV'T DIRECT INTERVENTION. CANADIAN EXPORTERS WILL HAVE TO FACE STRONG COMPETITION, AIMED AT INDIVIDUAL MILLERS, FOR INCREASED MARKET SHARES. THE OPENING OF CANOLA MARKET TO HUMAN CONSUMPTION USES WILL CREATE NEW OPPORTUNITIES.

2. FISHERIES, SEA PRODUCTS & SERV.

PORTUGUESE MARKET FOR IMPORTED COD WILL REMAIN SIGNIFICANT BUT ACCESS TO IT WILL INCREASINGLY DEPEND ON COMPREHENSIVE MARKETING STRATEGIES.

3. AGRI & FOOD PRODUCTS & SERVICE

INTEREST IN CANADIAN SEED POTATOES WILL REMAIN HIGH IN SPITE OF NEED FOR PORTUGAL TO SEEK DEROGATIONS FROM EEC REGULATIONS. SEMEN AND ANIMAL FEED SALES CONTINUE TO EXPAND. EMBRYO TRANSFER MARKET IS NOW POISED FOR TAKEOFF. INTEREST IN DAIRY CATTLE WILL REMAIN HIGH.

4. ADVANCED TECH. PROD. & SERV

THE INFORMATIZATION OF GOV'T AND BUSINESS OPERATIONS WILL CONTINUE AT A RAPID PACE. MODERNIZATION OF TELECOMMUNICATIONS AND PRIVATIZATION OF RADIO AND TV SECTORS WILL CONTINUE TO DEMAND STATE-OF-THE-ART PRODUCTS AND SERVICES.

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

1. FISHERIES, SEA PRODUCTS & SERV.
2. GRAINS AND OILSEEDS
3. MINE, METAL, MINERAL PROD & SRV

4. AGRI & FOOD PRODUCTS & SERVICE
5. ADVANCED TECH. PROD. & SERV

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LISBON

Market: PORTUGAL

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: ANIMAL, POULTRY BREEDING STOCK

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	0.73 \$M	0.66 \$M	0.98 \$M	1.10 \$M
Canadian Exports	0.11 \$M	0.10 \$M	0.48 \$M	0.50 \$M
Canadian Share of Market	15.00 %	16.00 %	41.00 %	45.00 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	46.00 %
FRANCE	16.00 %
NETHERLANDS	3.00 %
UNITED KINGDOM	1.00 %

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

Products/services for which there are good market prospects:

1. SEMEN
2. EMBRYO TRANSFER PRODUCTS

Factors contributing to current successful Canadian exports:

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

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LISBON

Market: PORTUGAL

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

Activity: ONGOING SUPPORT FOR LOCAL AGENTS
Expected Results: CONTINUED EXPORT VALUE GROWTH

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LISBON

Market: PORTUGAL

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: SEEDS & SPECIAL CROPS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	18.30 \$M	34.00 \$M	24.00 \$M	31.00 \$M
Canadian Exports	0.70 \$M	2.50 \$M	2.40 \$M	2.50 \$M
Canadian Share of Market	4.00 %	7.00 %	10.00 %	8.00 %

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

Major Competing Countries

Market Share

NETHERLANDS	37.00 %
UNITED KINGDOM	34.00 %
DENMARK	7.00 %

Products/services for which there are good market prospects:

1. SEED POTATOES

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- EEC DEROGATION REQUI
- REMENT
- EEC NON - TARIFF PROTECTIONIST
- MEASURES

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LISBON

Market: PORTUGAL

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

Activity: MARKETING CALLS ON BUYERS
Expected Results: MAINTAIN INTEREST IN CDN PRODUCT

Activity: REGULAR MEETINGS WITH LOCAL AUTHORITIES
Expected Results: ENSURE PROMPT ACTION RE DEROGATION

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

Activity: MAINTAIN CLOSE CONTACT WITH PTGSE PHYTOSANITARY REPS
Expected Results: FACILITATE
 A BETTER MARKET PENETRATION

Activity: PROPOSED INCOMING MISSION
Expected Results: MAINTAIN INTEREST IN CDN PRODUCT

RPIC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LISBON

Market: PORTUGAL

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: FEED, FERTILIZER & VET PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	192.00 \$M	253.00 \$M	244.00 \$M	284.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	2.40 \$M	4.00 \$M
Canadian Share of Market	0.00 %	0.00 %	1.00 %	1.40 %

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

Major Competing Countries Market Share

THAILAND	45.00 %
UNITED STATES OF AMERICA	41.00 %
BRAZIL	0.50 %

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

Products/services for which there are good market prospects:

1. ALFALFA [PELLETS/CUBES]

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Provincial export promotion
- Strong sectoral capability in Canada

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LISBON

Market: PORTUGAL

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

Activity: CONTINUING SUPPORT FOR LOCAL AGENT
Expected Results: MAINTAIN EXPORTS GROWTH RATE

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

Activity: INCOMING MISSION ON ALFAFA [CUBES & PELLETS]
Expected Results: SECURE & EXPAND MARKET SHARE

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LISBON

Market: PORTUGAL

Sector : FISHERIES, SEA PRODUCTS & SERV.

Sub-Sector: FISH & SHELLFISH & OTHER PROD

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	397.00 \$M	432.00 \$M	397.00 \$M	387.00 \$M
Canadian Exports	34.00 \$M	76.00 \$M	49.00 \$M	50.00 \$M
Canadian Share of Market	8.50 %	17.60 %	13.00 %	13.00 %

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

Major Competing Countries

Market Share

ICELAND	35.00 %
NORWAY	19.00 %
PORTUGAL	9.00 %
DENMARK	5.50 %
OTHER COUNTRIES	4.00 %

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

Products/services for which there are good market prospects:

1. COD
2. SQUID [ILLEX TYPE]
3. HAKE
4. REDFISH
5. OTHER GROUND FISH SPECIES

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- Strong sectoral capability in Canada

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Restrictive quotas
- 13% AD VALOREM DUTY APPLICABLE
- TO WET SALT COD WHEN EEC TARIFF

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LISBON

Market: PORTUGAL

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

Activity: ONGOING PROGRAM OF MARKETING CALLS ON MAJ IMPORTERS
Expected Results: REPORTS TO EXPORTERS ON OPPORTUNITIES

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

Activity: CLOSER CONTACT WITH LOCAL AUTHORITIES
Expected Results: MAINTAIN ACCESS TO MARKET

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LISBON

Market: PORTUGAL

Sector : GRAINS AND OILSEEDS

Sub-Sector: CEREAL GRAINS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	817.00 \$M	655.00 \$M	626.00 \$M	666.00 \$M
Canadian Exports	59.00 \$M	38.00 \$M	24.00 \$M	33.00 \$M
Canadian Share of Market	7.00 %	6.00 %	4.00 %	5.00 %

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

Major Competing Countries	Market Share
PORTUGAL	64.00 %
UNITED STATES OF AMERICA	13.00 %
SAUDI ARABIA	4.00 %

Products/services for which there are good market prospects:

1. WHEAT
2. FEED BARLEY CORN
3. CORN

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- REPORTEDLY, CDN WHEAT IS PRESENTLY
- FACING QUALITY COMP. FROM SAUDI ARA

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LISBON

Market: PORTUGAL

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

Activity: ONGOING MKT CONTACTS WITH EXPANDED POTENTIAL CUST BASE
Expected Results: TIMELY ADVISE TO EXPORTERS TO TRENDS & OPPORTUNITIES.

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

Activity: CALLS ON MILLERS & IMPORT AGENTS
Expected Results: ASSESS COMPETITION CAPABILITIES

Activity: OUTGOING MISSION FROM CANADA TO PORTUGAL
Expected Results: INCREASE MARKET SHARE

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LISBON

Market: PORTUGAL

Sector : GRAINS AND OILSEEDS

Sub-Sector: OILSEEDS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	342.00 \$M	467.00 \$M	423.00 \$M	439.00 \$M
Canadian Exports	4.00 \$M	6.00 \$M	8.10 \$M	9.00 \$M
Canadian Share of Market	1.20 %	1.30 %	1.90 %	2.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	37.00 %
FRANCE	33.00 %
BRAZIL	14.00 %
PARAGUAY	3.00 %
ARGENTINA	1.50 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. SOYABEANS
2. CANOLA
3. SUNFLOWER

Factors contributing to current successful Canadian exports:

- Competitive pricing
- Strong sectoral capability in Canada

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Restrictive quotas
- EEC SUBSIDY ON THE
- EEC CROP
- EEC NON-TARIFF PROTECTIONIST
- MEASURES

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LISBON

Market: PORTUGAL

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

Activity: ONGOING CALLS ON CLIENTS AND POTENTIAL IMPORTERS
Expected Results: OPEN NEW SALES OPPORTUNITIES

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

Activity: MEETINGS WITH LOCAL AUTHORITIES RE CANOLA
Expected Results: ACCEPTANCE TO CANOLA FOR HUMAN CONSUMPTION

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LISBON

Market: PORTUGAL

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: BROADCASTING, INC. CABLE TV

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	11.00 \$M	15.00 \$M	16.00 \$M	17.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.00 \$M	1.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	5.90 %

Major Competing Countries

Market Share

ITALY	34.00 %
DENMARK	17.00 %
JAPAN	14.00 %
GERMANY WEST	6.00 %

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

Products/services for which there are good market prospects:

1. CATV
2. STUDIO EQUIPMENT

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector

Factors for Canadian exports not reaching market potential:

- Market prospects have not been adequately explored

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LISBON

Market: PORTUGAL

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

Activity: MARKETING CALLS ON POTENTIAL BUYERS
Expected Results: OPEN SALES OPPORTUNITIES

Activity: OUTGOING MISSION ON CATV
Expected Results: INCREASED LOCAL AWARENESS ON CDN CAPABILITIES

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

NEW TV BROADCASTING SERVICES	Approximate Value:	24 M\$
	Financing Source :	B.C. - Buyer Credits required DOM - Domestically funded
	Contact :	

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LIS80N

Market: PORTUGAL

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: COMPUTERS HARD/SOFTWARE & COMP

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	189.00 \$M	322.00 \$M	325.00 \$M	340.00 \$M
Canadian Exports	0.00 \$M	1.60 \$M	2.00 \$M	3.00 \$M
Canadian Share of Market	0.00 %	0.50 %	0.60 %	0.90 %

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

Major Competing Countries Market Share

UNITED STATES OF AMERICA	21.00 %
UNITED KINGDOM	18.00 %
GERMANY WEST	11.00 %
NETHERLANDS	9.00 %
ITALY	7.00 %
FRANCE	6.00 %

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

Products/services for which there are good market prospects:

1. SOFTWARE
2. NETWORKS
3. CONSULTING

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Provincial export promotion
- Strong sectoral capability in Canada

Factors for Canadian exports not reaching market potential:

- Market prospects have not been adequately explored

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LISBON

Market: PORTUGAL

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

Activity: CONTINUING SUPPORT FOR LOCAL AGENTS
Expected Results: MAINTAIN GROWTH RATE IN MARKET SHARE

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

Activity: EXPAND NETWORK OF CONTRACTS WITH POTENTIAL BUYERS
Expected Results: MAINTAIN GROWTH RATE IN MARKET SHARE

Activity: OUTGOING MISSION ON INFORMATICS
Expected Results: INCREASED AWARENESS OF MARKET POTENTIAL

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LISBON

Market: PORTUGAL

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: AEROSPACE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	12.00 \$M	26.00 \$M	30.00 \$M	250.00 \$M
Canadian Exports	0.10 \$M	0.00 \$M	0.00 \$M	30.00 \$M
Canadian Share of Market	0.80 %	0.00 %	0.00 %	12.00 %

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

Major Competing Countries Market Share

UNITED KINGDOM	41.00 %
UNITED STATES OF AMERICA	39.00 %
FRANCE	7.00 %
GERMANY WEST	3.00 %

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

Products/services for which there are good market prospects:

1. CL - 215
2. DASH - 8

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector

Factors for Canadian exports not reaching market potential:

- PREFERENTIAL POSITION OF COMPETIT
- AGENT [DASH-8]. REELUCTANCE OF AUTH

29/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LISBON

Market: PORTUGAL

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

Activity: ONGOING SUPPORT FOR LOCAL AGENTS
Expected Results: SALES OF DASH-8 AND CL-215

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LISBON

Market: PORTUGAL

Sector : FOREST PRODUCTS,EQUIP,SERVICES

Sub-Sector: PULP AND PAPER PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	27.00 \$M	34.00 \$M	37.00 \$M	46.00 \$M
Canadian Exports	0.50 \$M	1.60 \$M	1.70 \$M	2.50 \$M
Canadian Share of Market	2.00 %	5.00 %	4.00 %	5.00 %

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

Major Competing Countries

Market Share

FINLAND	33.00 %
SWEDEN	33.00 %
NORWAY	12.00 %
UNION OF SOVIET SOC REP	2.00 %
SPAIN	11.00 %

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

Products/services for which there are good market prospects:

1. NEWSPRINT

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Strong sectoral capability in Canada

Factors for Canadian exports not reaching market potential:

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

29/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LISBON

Market: PORTUGAL

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

Activity: CONTINUING CALLS ON CLIENTS & POTENTIAL BUYERS
Expected Results: MAINTAIN EXPORTS GROWTH TRENDS

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LISBON

Market: PORTUGAL

Sector : MINE,METAL,MINERAL PROD & SRV

Sub-Sector: MINERALS AND MINERAL PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	159.00 \$M	178.00 \$M	171.00 \$M	187.00 \$M
Canadian Exports	3.00 \$M	12.00 \$M	16.00 \$M	20.00 \$M
Canadian Share of Market	1.50 %	7.00 %	9.00 %	11.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	55.00 %
SOUTH AFRICA	19.00 %
UNITED KINGDOM	9.00 %
AUSTRALIA	2.00 %
COLOMBIA	2.00 %
POLAND	1.50 %

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

Products/services for which there are good market prospects:

1. COAL

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Market prospects have not been adequately explored

29/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LISBON

Market: PORTUGAL

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

Activity: CONTINUING CONTACT WITH CLIENTS
Expected Results: MAINTAIN EXPORTS GROWTH TREND

Post : LISBON

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Post/Contact</u>
89/06/00	MUNICIPALIS'89, LISBON, PORTUGAL INFO BOOTH, ONLY	ADVANCED TECH. PROD. & SERV
89/07/08	MUNICIPALIS 89 LISBON PORTUGAL INFO BOOTH, WITH GROUP	ADVANCED TECH. PROD. & SERV

RPT81

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: LONDON

Country: UNITED KINGDOM

THE UK IMPORTED 100 BILLION POUNDS STERLING WORTH OF GOODS IN 1988 OF WHICH NEARLY 60% ORIGINATED FROM OUTSIDE THE EC. UK IMPORTS WILL REMAIN HEALTHY OF CAPACITY CONSTRAINTS IN UK INDUSTRY AND STRONG DEMAND FOR WORLD CLASS PRODUCT OFFERING. CANADA'S SHARE OF THIS VERY LARGE MARKET WAS \$C3.45 BN OR APPROXIMATELY 3% OF BRITAIN'S NON-EEC IMPORTS, CANADIAN EXPORTS TO THE UK REPRESENT ONE THIRD OF ALL CANADA'S EXPORTS TO THE EUROPEAN COMMUNITY AND CANADIAN MARKET PENETRATION IS ON AVERAGE FOUR TIMES HIGHER THAN IN OTHER EC COUNTRIES. SINCE 1985, THE CANADIAN DOLLAR HAS DECLINED 16% AGAINST THE POUND AND AS CANADIAN COMPETITIVENESS IMPROVED OUR EXPORTS HAVE GROWN BY 11% IN 1987 AND 15.5% IN THE FIRST EIGHT MONTHS OF 1988, FASTER THAN THE GROWTH IN OVERALL UK IMPORTS. WE EXPECT THAT NEAR TERM EXCHANGE RATE FLUCTUATIONS WILL BE MODEST AND UNLIKELY TO ADVERSELY AFFECT CANADA'S COMPETITIVENESS. FURTHER GROWTH IN EXPORTS TO BRITAIN THROUGH TO 1990 IS FORECAST. SOME OF OUR TRADITIONAL EXPORTS WHICH HAVE BEEN VERY BUOYANT OF LATE (LUMBER, PULP, NEWSPRINT) AND AGRICULTURAL GOODS REMAIN VULNERABLE TO SPECIAL EC DEALS WITH EFTA OR VARIOUS NTRS. IN THE AGRICULTURE AND RESOURCE SECTORS WE ARE DEVELOPING QUALITY FOOD AND HIGHER VALUE ADDED LUMBER AND PAPER PRODUCT MARKETS. IN SOME MANUFACTURED PRODUCTS - TELECOMMUNICATIONS, PHOTOGRAPHIC EQUIPMENT, THE AIRCRAFT SECTOR AND AUTOMOTIVE GOODS - WE HAVE EXPERIENCED 30% PLUS GROWTH IN 1987 AND THOUGH THE OVERALL DOLLAR VALUE REMAINS SMALL, THE DYNAMISM OF OUR HIGHER VALUE ADDED PRODUCT EXPORTS WILL BE THE BASIS OF EXPORT GROWTH. IN 1987 THE COMMERCIAL/ECONOMIC DIVISION RESPONDED TO 8191 BUSINESS ENQUIRIES - THIS FIGURE ROSE SHARPLY TO 7413 IN THE FIRST HALF OF 1988. SOME 135 CANADIAN MANUFACTURING COMPANIES HAVE OFFICES IN BRITAIN AND MANY MANUFACTURE FOR LOCAL OR EXPORT MARKETS, USING THEIR UK OPERATIONS AS A EUROPEAN HEADQUARTERS AND STIMULATING INTER CORPORATE TRADE. WE EXPECT THIS TREND TO CONTINUE AS CANADIAN FIRMS POSITION THEMSELVES TO TAKE ADVANTAGE OF THE EVOLVING SINGLE EUROPEAN MARKET. A MAJOR FOCUS OF OUR WORK IN THE NEAR TERM WILL BE TO HELP CANADIAN COMPANIES EXPLOIT 1992 OPPORTUNITIES AND RESOLVE ACCESS PROBLEMS. DESPITE MISGIVINGS IN SOME AREAS, OUR VIEW IS THAT 1992 AS CONCEIVED BY THE UK GOVERNMENT WILL STIMULATE TRADE AND CREATE CONSIDERABLE OPPORTUNITIES FOR CANADA. IN ADDITION SOME 39 CANADIAN BANK, INVESTMENT AND LEGAL FIRMS OPERATE IN LONDON'S FINANCIAL COMMUNITY. 1988 HAS BEEN A BANNER YEAR FOR CANADIAN DOLLAR EURO BONDS WITH \$12 BN IN NEW ISSUES BY OCTOBER - A MAJOR SOURCE OF CANADA'S INTERNATIONAL FINANCE. BRITAIN IS A MAJOR SOURCE OF OTHER INDIRECT (EQUITY) AND DIRECT INVESTMENT (1.5 BN IN 1987) AND REMAINS CANADA'S 2ND LARGEST INVESTOR. LONDON IS OFTEN THE EUROPEAN FOCAL POINT FOR INTERNATIONAL FINANCIAL SERVICE FIRMS. WE NEED TO ENSURE THAT CANADA, AS A MAJOR ECONOMIC POWER, A LARGER ECONOMIC DEBTOR AND CREDITOR, AND MEMBER OF THE G-7 IS WELL REGARDED IN FOREIGN EXCHANGE AND OTHER FINANCIAL MARKETS. THE UK ECONOMY HAS BEEN VERY BUOYANT IN 1988 WITH EXCEPTIONALLY STRONG CONSUMER AND INVESTMENT EXPENDITURES CREATING A YAWNING TRADE DEFICIT; MANUFACTURING INVESTMENT IS EXPECTED TO INCREASE 18% NEXT YEAR, A SECTOR INTO WHICH MOST CANADIAN EXPORTS FEED.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 EXPORT PROMOTION PRIORITIES

Mission: LONDON

Country: UNITED KINGDOM

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

1. FOREST PRODUCTS,EQUIP,SERVICES
CANADA HAS TRADITIONALLY MAINTAINED A SIGNIFICANT SHARE OF THE UK MARKET. CURRENCY RE-ALIGNMENT HAS IMPROVED CANADA'S COMPETITIVE POSITION IN THIS PRICE-SENSITIVE SECTOR.
2. ADVANCED TECH. PROD. & SERV
UK MARKET IS EXPANDING RAPIDLY. NORTH AMERICA IS ACKNOWLEDGED SOURCE OF HI-TECH PRODUCTS AND SERVICES. INCREASED SPECIALIZATION, WELL TARGETED MARKETING STRATEGY, & CAREFUL SELECTION OF UK PARTNERS. HAVE FACILITATED MARKET ENTRY FOR NEW CANADIAN EXPORTERS.
3. AGRI & FOOD PRODUCTS & SERVICE
COMPETITIVE PRICING IS KEY IN THIS SECTOR AND THE CONTINUED WEAKENING OF THE CANADIAN DOLLAR HAS FAVOURED CANADIAN EXPORTERS DESPITE THE EEC COMMON AGRICULTURAL POLICY.
4. FISHERIES,SEA PRODUCTS & SERV.
DEMAND IS STRONG AND CONSUMPTION TRENDS ARE FAVOURABLE IN THE UK. HIGH PRICES FOR FROZEN COD DISTURBED TRADE IN 1987 BUT 1988 TRADE LOOKS STRONG AGAIN.
5. DEFENCE PROGRAMS,PRODUCTS,SERV
INDUSTRY-TU-INDUSTRY COOPERATION CONTINUES TO BROADEN IN SCOPE. ANNUAL MEETING OF RDP COMMITTEE AND FAVOURABLE PROCUREMENT DECISIONS BY DND AND BY UKMOD HAVE IMPROVED THE ENVIRONMENT FOR EXPANSION OF TWO-WAY TRADE & BUSINESS COOPERATION. KEEN UK INTEREST IN DND PROCUREMENT PROJECTS WILL PAVE THE WAY FOR OFFSET OPPORTUNITIES.
6. MINE,METAL,MINERAL PROD & SRV
FAVOURABLE CURRENCY FLUCTUATIONS SHOULD MARGINALLY IMPROVE CANADIAN ACCESS TO UK MARKET. EXPORT VOLUME IS SIGNIFICANT AND TRADE CHANNELS WELL ESTABLISHED.

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

- | | |
|-----------------------------------|-----------------------------------|
| 1. FOREST PRODUCTS,EQUIP,SERVICES | 4. AGRI & FOOD PRODUCTS & SERVICE |
| 2. MINE,METAL,MINERAL PROD & SRV | 5. CHEM PROD & PETROCHEM,EQP,SERV |
| 3. FISHERIES,SEA PRODUCTS & SERV. | 6. GRAINS AND OILSEEDS |

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LONDON

Market: UNITED KINGDOM

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: MEATS & MEAT BY-PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	2850.00 \$M	2900.00 \$M	2900.00 \$M	2900.00 \$M
Canadian Exports	14.80 \$M	8.30 \$M	5.30 \$M	5.00 \$M
Canadian Share of Market	0.50 %	0.30 %	0.20 %	0.20 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	2.00 %
FRANCE	3.00 %
BELGIUM	3.00 %
NETHERLANDS	16.00 %
DENMARK	30.00 %
OTHER COUNTRIES	14.00 %

Current Status of Canadian
exports in this sector/subsector: Market share declining

Products/services for which there are good market prospects:

1. PORK OFFAL (HUMAN CONSUMPTION)
2. BEEF OFFAL (NON HUMAN CONSUMPTION)
3. HIGH QUALITY BEEF
4. BEEF JERKY

Factors contributing to current successful Canadian exports:

- Import duties are low
- Competitive pricing
- Strong sectoral capability in Canada

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Restrictive standards
- HORMONE BAN
- (31.12.88)

29/05/89

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LONDON

Market: UNITED KINGDOM

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

Activity: ONGOING LIAISON WITH UK IMPORTERS-IMPROVE DOCUMENTARY PROCE.
Expected Results: FEWER PROBLEMS EXPERIENCED IN FY 88/89 WITH SHIPMENTS HELD UP AT PORTS; FEWER STILL IN 89-90

Activity: CONT. MONITORING OF SITUATION ON HORMONE BAN
Expected Results: POSSIBLE FURTHER DELAY IN BAN BEING IMPLEMENTED

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

Activity: ENCOURAGE CDN EXPORTERS-EXPORT HORMONE FREE BEEF
Expected Results: NEW MARKET TO BE DEVELOPED. LIMITED RESULTS IN YEAR ONE.

Activity: ENCOURAGE CONT. EXPORTS OF EDIBLE PORK/BEEF OFFAL
Expected Results: MAINTENANCE OF MARKET SHARE OF EDIBLE PORK OFFAL; DEVELOP NEW MARKET FOR INEDIBLE OFFAL

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LONDON

Market: UNITED KINGDOM

Sector : FISHERIES, SEA PRODUCTS & SERV.

Sub-Sector: FISH & SHELLFISH & OTHER PROD

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	841.00 \$M	1100.00 \$M	1000.00 \$M	1000.00 \$M
Canadian Exports	35.00 \$M	33.00 \$M	35.00 \$M	37.00 \$M
Canadian Share of Market	4.00 %	3.30 %	3.50 %	3.70 %

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

Major Competing Countries

Market Share

ICELAND	10.00 %
NORWAY	7.00 %
DENMARK	0.00 %
NETHERLANDS	2.00 %
INDIA	2.00 %
OTHER COUNTRIES	2.00 %

Current Status of Canadian

exports in this sector/subsector: Well established and growing

Products/services for which there are good market prospects:

1. FROZEN COD
2. CRAB
3. FROZEN SALMON
4. LOBSTER
5. SHRIMP

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector

Factors for Canadian exports not reaching market potential:

- LACK OF LONG-TERM APPR TO UK MKT -
- TENDENCY TO TREAT IT AS RESIDUAL MK

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LONDON

Market: UNITED KINGDOM

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

Activity: CONT. LIAISON WITH UK PURCHASERS
Expected Results: INCREASED AWARENESS OF CANADIAN SUPPLIERS

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

Activity: LOBSTER PROMOTION
Expected Results: INCREASED AWARENESS OF CDN LOBSTER

Activity: STUDY OF IMPACT OF PRICE RISE ON CANNED SALMON MARKET
Expected Results: INFORM CANADIAN INDUSTRY OF IMPLICATIONS

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LONDON

Market: UNITED KINGDOM

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	15000.00 \$M	16000.00 \$M	16500.00 \$M	16500.00 \$M
Canadian Exports	25.00 \$M	25.00 \$M	40.00 \$M	60.00 \$M
Canadian Share of Market	1.00 %	1.00 %	1.00 %	1.00 %

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

Major Competing Countries	Market Share
UNITED KINGDOM	85.00 %
UNITED STATES OF AMERICA	8.00 %
FRANCE	3.00 %
GERMANY WEST	2.00 %
ITALY	1.00 %

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

Products/services for which there are good market prospects:

1. SONOBODY PROCESSORS
2. TANK FIRE CONTROL COMPUTERS
3. DIGITAL COMMUNICATION SWITCHES
4. AIR NAVIGATION TRAINING
5. ALUMINIUM CASTINGS
6. ELECTRONIC MODULES
7. AIRCRAFT SIMULATORS
8. MAINTENANCE SIMULATORS

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- Fairs and Missions support
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- Willingness of exporters to invest/joint venture in territory

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LONDON

Market: UNITED KINGDOM

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Non-competitive pricing
- Limited Canadian capabilities
- UK MOD BUY IN UK
- POLICY

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

Activity: FOLLOW UP TO MINE COUNTER MEASURES MISSION
Expected Results: PROMOTION OF JOINT VENTURES BETWEEN CDN & UK MCM COMPANIES TO PURSUE UK AND THIRD COUNTRY MARKETS

Activity: FOLLOW UP TO FARNBOROUGH INTERNATIONAL 88
Expected Results: PROMOTION OF CDN AEROSPACE PRODUCTS AND COMPANIES TO UK MOD AND UK INDUSTRY

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

Activity: CDN INDUSTRIAL MISSION OCTOBER 89
Expected Results: EXPOSURE OF TARGETED CDN INDUSTRIAL SECTOR TO UK MOD OPERATIONAL & PROCUREMENT EXECUTIVE REPRESENTATIVES

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

Activity: CDA/UK RDP STEERING COMMITTEE APRIL 89
Expected Results: I.D. OF COOPERATIVE DEFENCE DEVELOPMENT PROJECTS BETWEEN CDA & UK

Activity: CDN INDUSTRIAL BRIEFINGS TO UK MOD AT CDA HOUSE
Expected Results: IN DEPTH EXPOSURE OF UK MOD OPERATIONAL AND REQUIREMENTS PERSONNEL TO CDN NICHE CAPABILITIES

Activity: PARIS AIRSHOW JUNE 89
Expected Results: PROMOTION OF CDN PARTICIPATION IN AEROSPACE JOINT VENTURE

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LONDON

Market: UNITED KINGDOM

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: COMPUTERS HARD/SOFTWARE & COMP

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	8750.00 \$M	9000.00 \$M	9500.00 \$M	10500.00 \$M
Canadian Exports	70.00 \$M	90.00 \$M	110.00 \$M	130.00 \$M
Canadian Share of Market	1.00 %	1.00 %	1.00 %	1.00 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	20.00 %
JAPAN	20.00 %
UNITED KINGDOM	20.00 %
OTHER COUNTRIES	10.00 %

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

Products/services for which there are good market prospects:

1. SOFTWARE
2. DATA COMMUNICATIONS
3. SPECIALIZED COMPUTER HARDWARE
4. COMPUTER SERVICES

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Limited appreciation/understanding of distribution system

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LONDON

Market: UNITED KINGDOM

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

Activity: OVERVIEW OF UK MARKET
Expected Results: ASSIST CDN COMPANIES TO IDENTIFY MORE CLEARLY OPPORTUNITIES

Activity: CONVERSION OF EXISTING CONTACT/CO. IN SECTOR TO WIN
Expected Results: POTENTIAL AGENTS

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

Activity: BRITISH ELECTRONICS WEEK
Expected Results: ENHANCED UK AWARENESS OF CDA AS COMPETITIVE SUPPLY SOURCE

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

Activity: CO-PROMOTIONAL COMPANY SEMINARS AT CANADA HOUSE
Expected Results: NEW SALES OFFICE FOR CDN FIRMS IN THE UK

Activity: PREPARATION OF UK MARKET REPORTS - CIRCULATE TO CDN INDUSTRY
Expected Results: HEIGHTENED INTEREST IN UK MARKET BY CDN SUPPLIERS

Activity: IDENTIFICATION OF UK BUYERS FOR PEMD/MISSION TRIPS TO CDA
Expected Results: INTRODUCE NEW CDN SUPPLIERS TO UK MARKET

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LONDON

Market: UNITED KINGDOM

Sector : FOREST PRODUCTS,EQUIP,SERVICES

Sub-Sector: WOOD AND WOOD PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	2250.00 \$M	2450.00 \$M	2600.00 \$M	2450.00 \$M
Canadian Exports	350.00 \$M	420.00 \$M	480.00 \$M	450.00 \$M
Canadian Share of Market	15.00 %	17.00 %	18.00 %	18.00 %

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

Major Competing Countries Market Share

SWEDEN	14.00 %
FINLAND	12.00 %
UNION OF SOVIET SOC REP	10.00 %
UNITED STATES OF AMERICA	8.00 %

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

Products/services for which there are good market prospects:

1. SOFTWOOD LUMBER
2. SECONDARY WOOD PRODUCTS
3. SOFTWOOD PLYWOOD
4. HARDWOOD LUMBER

Factors contributing to current successful Canadian exports:

- Import duties are low
- Aggressive marketing
- Fairs and Missions support
- Trade Fair activity
- Provincial export promotion
- Competitive pricing
- Strong sectoral capability in Canada

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LONDON

Market: UNITED KINGDOM

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Restrictive quotas
- Restrictive standards
- Non-competitive pricing
- OTHER TECHNICAL
- CONSIDERATION
- STRONG COMPETITION, EXCHANGE RATES,
- QUOTA, PLANT HEALTH REGULATIONS

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

Activity: MONITORING, REPORTING AND RECDM. ON MAJOR ACCESS ISSUES
Expected Results: IMPROVED STRATEGIC FRAMEWORK FOR APPROPRIATE INTERVENTION, DECISIONS AND POLICY.

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

Activity: INTERBUILD '89
Expected Results: INCREASED SALES OF LUMBER BUT MOST SIGNIFICANTLY PLYWOOD AND VALUE ADDED PRODUCTS

Activity: WESTERN RED CEDAR SHINGLE MISSION
Expected Results: INCREASED SALES AND INTERNATIONAL MARKET CLARIFICATION

Activity: HOUSING MISSION (TIMBER FRAME CONSTRUCTION - TFC)
Expected Results: INCREASED LEVELS TFC, LUMBER SALES AND PLYWOOD

Activity: ARCHITECTURAL JOINERY MISSION
Expected Results: MARKET DEVELOPMENT

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LONDON

Market: UNITED KINGDOM

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

Activity: WITH COFI-BPIP, ASSESS OPPORTUNITIES FOR WOOD PRODUCT IN UK
Expected Results: INCREASED INFORMATION, MARKET DEVELOPMENT, PROMOTION AND SALE

Activity: MEET WITH SENIOR EXECUTIVES OF TFC CO. & ESTATE AGENCIES
Expected Results: REVITALIZE LEVEL OF TFC HOUSING STARTS

Activity: SECTOR PROFILES
Expected Results: POSITION PAPERS FOR CONSULTATION AND ASSESSMENT OF POLICY

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LONDON

Market: UNITED KINGDOM

Sector : MINE, METAL, MINERAL PROD & SRV

Sub-Sector: MINERALS AND MINERAL PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	9197.00 \$M	9342.00 \$M	10600.00 \$M	12000.00 \$M
Canadian Exports	634.00 \$M	593.00 \$M	700.00 \$M	800.00 \$M
Canadian Share of Market	6.90 %	6.30 %	6.60 %	6.60 %

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

Major Competing Countries

Market Share

EUROPEAN COMMON MARKET C	30.00 %
SWITZERLAND	30.00 %
UNITED STATES OF AMERICA	9.00 %

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

Products/services for which there are good market prospects:

1. COAL
2. IRON ORE
3. PRECIOUS METALS CONCENTRATES
4. NICKEL ORES
5. TIN CONCENTRATES
6. ZINC CONCENTRATES

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- CURRENCY FLUCTUATIONS CAN RESTRICT
- SALES IN THIS MARKET

29/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LONDON

Market: UNITED KINGDOM

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

Activity: CONTACT WITH GOVT/ASBESTOS ASS. TO MONITOR LEGISLATION
Expected Results: REGULAR REPORTS TO BE MADE

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

Activity: MAINTAIN EXISTING & EXPAND RANGE OF CONTACTS-METAL BUYERS
Expected Results: HOLD OR INCREASE CDA MARKET SHARE

Activity: PREPARE ADDITIONAL MARKET PROFILES
Expected Results: STRATEGIC ANALYSIS OF SECTOR

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LONDON

Market: UNITED KINGDOM

Sector : MINE, METAL, MINERAL PROD & SRV

Sub-Sector: METALS, PRIMARY & FABRICATED

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	10550.00 \$M	11442.00 \$M	13500.00 \$M	14000.00 \$M
Canadian Exports	230.00 \$M	211.00 \$M	320.00 \$M	340.00 \$M
Canadian Share of Market	2.20 %	1.80 %	2.30 %	2.40 %

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

Major Competing Countries

Market Share

EUROPEAN COMMON MARKET C	60.00 %
UNITED STATES OF AMERICA	6.00 %
SWEDEN	5.00 %
NORWAY	4.00 %

Current Status of Canadian

exports in this sector/subsector: Mature with little growth

Products/services for which there are good market prospects:

1. COPPER
2. LEAD
3. NICKEL
4. ZINC
5. MAGNESIUM

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- Willingness of exporters to invest/joint venture in territory
- SHRINKAGE OF UK MFG SECT.
- ESPECIALLY METAL WASHING
- INDUSTRIES

29/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LONDON

Market: UNITED KINGDOM

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- CURRENCY FLUCTUATIONS CAN INHIBIT
- SALES TO THIS MARKET

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

Activity: ACTIVELY ENCOURAGE FORMATION OF NICKEL/COPPER STUDY GROUPS
Expected Results: ESTABLISHMENT OF STUDY GROUP

Activity: CONT. MONITORING/REPORTING ON INTERNATIONAL METALS SCENE
Expected Results: INSIGHT INTO MARKET ACTIVITY

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

Activity: PREPARE ADDITIONAL MARKET PROFILE
Expected Results: STRATEGIC ANALYSIS AND IDENTIFICATION OF TRADE OPPORTUNITIES

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RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: LONDON

Country: UNITED KINGDOM

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

	Total (\$ Million)	Canadian Share	Major Competitor Share
Current year	27000.00	9.00	58.00
One year ago	41000.00	5.00	70.00
Two years ago	40000.00	5.00	65.00

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

2.0 BILLION DOLLARS (GROSS FDI, EXCLUDING PORTFOLIO)

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

- USA
- AUSTRALIA
- FRANCE
- GERMANY
- SPAIN
- NETHERLANDS

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

- US CORPORATE MATCHMAKING
- VISITS BY US STATES (GOVERNORS AND BLUE-CHIP CORPORATIONS)
- DOING BUSINESS IN AUSTRALIA SEMINARS

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: LONDON

Country: UNITED KINGDOM

Compared to major competitive destinations, Canada is perceived to have

the following advantages:

- PROFITABILITY
- MARKET EXPANSION & DIVERSIFICATION
- PROMINENCE TO US MARKET
- NATURAL RESOURCES, POLITICAL STABILITY

the following constraints:

- GOVT REGULATIONS
- MARKET SIZE & DISPERSION
- TAXATION
- HIGH GOVT DEBT

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

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

The mission believes that the following sectors are of greatest interest to investors in its territory/country with an assigned ranking of 1-10:

Sector	Ranking
Agriculture/Food/Fish	5
Resource Processing	4
Machinery and Equipment	9
Transportation	10
Consumer Products	8
Commercial Service	7
Computer and Communications	6
Health Care Products/Medical	2
Aerospace and Defence	1
Strategic Technologies	3

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: LONDON

Country: UNITED KINGDOM

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

Date

Type: MISSION OUT, MINISTERIAL

ISTC: THE NEW GVT/INDUSTRY ALLIANCE

6/89

Location:

Invest Nature: ALL

Sector: MULTIPLE SECTORS

Cooperants: ISTC INV CDA

Estimated Budget: \$1,000.00

FTA UPDATE-MINT

4/89

Location:

Invest Nature: ALL

Sector: MULTIPLE SECTORS

Cooperants: INV CDA

Estimated Budget: \$5,000.00

Type: SEMINAR, ABROAD

FINANCIAL UPDATE

5/89

Location:

Invest Nature: ALL

Sector: MULTIPLE SECTORS

Cooperants: FIN INV CDA

Estimated Budget: \$1,000.00

Type: ENTREPRENURIAL SEMINAR

ENTREPRENEURIAL IMMIGRATION COUNSELLING SESSIONS

11/89

Location:

Invest Nature: ALL

Sector: MULTIPLE SECTORS

Cooperants: PROVS RWP

Estimated Budget: \$5,000.00

EI COMMUNICATIONS CAMPAIGN

10/89

Location:

Invest Nature: ALL

Sector: MULTIPLE SECTORS

Cooperants: PROVS RWP

Estimated Budget: \$50,000.00

29/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: LONDON

Country: UNITED KINGDOM

Date

Type: ENTREPRENURIAL SEMINAR

COMMUNICATIONS 89

5/89

Location:

Invest Nature: JOINT VENTURE
STRATEGIC PARTN
TECHN LICENSING

Sector: POWER & ENERGY EQUIP. & SERV.

Cooperants: ISTC/IITD

Estimated Budget: \$500.00

BRITISH ELECTRONICS WK

4/89

Location:

Invest Nature: JOINT VENTURE
STRATEGIC PARTN
TECHN LICENSING

Sector: POWER & ENERGY EQUIP. & SERV.

Cooperants: ISTC/IITD

Estimated Budget: \$500.00

CBI & EXHIBITION POSSIBLE INFO BOOTH.

11/89

Location:

Invest Nature: ALL

Sector: MULTIPLE SECTORS

Cooperants: INV CDA

Estimated Budget: \$9,000.00

Type: DIRECT MAIL CAMPAIGN

WINVEST IMPLEMENTATION

4/89

Location:

Invest Nature: ALL

Sector: MULTIPLE SECTORS

Cooperants: TPE INV CDA

Estimated Budget: \$3,000.00

FREE TRADE UPDATE

4/89

Location:

Invest Nature: ALL

Sector: MULTIPLE SECTORS

Cooperants: INV CDA

Estimated Budget: \$1,000.00

29/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: LONDON

Country: UNITED KINGDOM

Date

Type: OUTCALL PROGRAM

MARINE TECHNOLOGY: FOLLOW UP TO SEMINAR

5/89

Location:

Invest Nature: JOINT VENTURE
STRATEGIC PARTN
TECHN LICENSING

Sector: AGRI & FOOD PRODUCTS & SERVICE

Cooperants: ISTC TDS

Estimated Budget: \$1,000.00

HEALTH CARE FOLLOW UP TO BIOS PROJECT

4/89

Location:

Invest Nature: JOINT VENTURE
STRATEGIC PARTN
TECHN LICENSING

Sector: TRANSPORT SYS,EQUIP,COMP,SERV.

Cooperants: ISTC INV CDA

Estimated Budget: \$1,000.00

VENTURE BACKED COMPANIES IN CONJ W/INC PROJECT.

10/89

Location:

Invest Nature: JOINT VENTURE
STRATEGIC PARTN
TECHN LICENSING

Sector: MINE,METAL,MINERAL PROD & SRV

Cooperants: INV CDA

Estimated Budget: \$1,000.00

OPT ELECTRONICS IN CONJ W/CDA/FRG STUDY

9/89

Location:

Invest Nature: JOINT VENTURE
STRATEGIC PARTN
TECHN.LICENSING

Sector: POWER & ENERGY EQUIP. & SERV.

Cooperants: ISTC IN CDA

Estimated Budget: \$1,000.00

UK EXPORTERS-FOLLOW UP TO DM

6/89

Location:

Invest Nature: ALL
Sector: MULTIPLE SECTORS

Cooperants: ISTC/ADMS

Estimated Budget: \$1,000.00

29/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: LONDON

Country: UNITED KINGDOM

Date

Type: OTHER PROMOTION

PROMOTIONAL LIT:
TESTIMONIALS

6/89

Location:

Invest Nature: ALL

Sector: MULTIPLE SECTORS

Cooperants: CRD'S INV CDA

Estimated Budget: \$4,000.00

PRES OF INV CDA: BRIEFING FOR INVESTORS

3/90

Location:

Invest Nature: ALL

Sector: MULTIPLE SECTORS

Cooperants: INV CDA

Estimated Budget: \$1,000.00

Total estimated budget for all proposals:

\$86,000.00

Post : LONDON

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Post/Contact</u>
89/04/17	PAC EX'89 - BIRMINGHAM,U.K. INFO BOOTH, WITH GROUP	INDUSTRIAL MACHIN,PLANTS,SERV H.SCHROETER
89/04/24	SUNLEY MISSION TO EASTERN CANADA MISSION IN, TO INDUSTRY	FOREST PRODUCTS,EQUIP,SERVICES MCCALLUM/H.SCHROETER
89/04/25	BRITISH ELECTRONICS WEEK, LONDON, U.K. INFO BOOTH, ONLY	ADVANCED TECH. PROD. & SERV T.CASSIDY
89/05/00	FISHERIES BUYERS MISSION FROM U.K. MISSION IN, TO INDUSTRY	FISHERIES,SEA PRODUCTS & SERV.
89/05/00	ARCHITECTURAL JOINERY MISSION TO U.K./IRELAND MISSION OUT, INDUSTRY	FOREST PRODUCTS,EQUIP,SERVICES
89/05/00	WESTERN RED CEDAR SHINGLE & SH AKE MISSION MISSION OUT, INDUSTRY	FOREST PRODUCTS,EQUIP,SERVICES
89/05/03	BUYERS FROM W.EUROPE TO MTL INT'L FUR FAIR MISSION IN, TO FAIR	CONSUMER PRODUCTS MCCALLUM/WATERFALL
89/06/05	MISSION FM WESTERN EUROPE TO INTERCAN,EDMONTON MISSION IN, TO FAIR	PETROCHEM & CHEM PROD,EQP,SERV D.ADAMS/S.WATERFALL
89/07/03	ROYAL AGRICULTURAL SHOW STONELEIGH,ENGLAND INFO BOOTH, ONLY	AGRI & FOOD PRODUCTS & SERVICE H.SCHROETER/G.COTE
89/09/00	PARTICLE BOARD MISSION TO U.K. MISSION OUT, INDUSTRY	FOREST PRODUCTS,EQUIP,SERVICES

Post : LONDON

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Post/Contact</u>
89/09/05	OFFSHORE EUROPE '89, ABERDEEN, SCOTLAND FAIR, NATIONAL STAND	OIL & GAS EQUIPMENT, SERVICES H. SCHRÖETER/D. ADAMS
89/10/00	DEFENCE TRADE & INDUSTRIAL MIS SION (RDP) MISSION OUT, INDUSTRY	DEFENCE PROGRAMS, PRODUCTS, SERV
89/11/26	INTERBUILD '89 - CONSTRUCTION EXH., BIRMINGHAM, U.K. INFO BOOTH, ONLY	FOREST PRODUCTS, EQUIP, SERVICES D. ADAMS/H. SCHRÖETER

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: MADRID

Country: SPAIN

SPAIN WILL HAVE THE FASTEST GROWING ECONOMY IN THE EUROPEAN COMMUNITY IN 1988 AND AGAIN IN 1989. ACCORDING TO THE COMMUNITY'S ANNUAL ECONOMIC REPORT, REAL GDP GROWTH WILL BE 4.8 PERCENT IN 1988 AND IS PROJECTED AT 4.0 PERCENT FOR 1989. CANADIAN TRADE WITH SPAIN IN 1988 SHOULD HIT A NEW RECORD HIGH OF ABOUT \$900 MILLION, ALMOST DOUBLE THE 1985 TOTAL. ALTHOUGH THE CANADIAN DOLLAR EXCHANGE RATE IS CURRENTLY NEAR A SIX YEAR LOW AT 97 PESETAS, PROJECTIONS FOR 1988 INDICATE THAT CANADA'S TRADE DEFICIT WILL BE APPROXIMATELY \$400 MILLION. WITH A POPULATION OF 40 MILLION AND A GDP OF \$400 BILLION, SPAIN HAS THE 11TH LARGEST ECONOMY IN THE WORLD, IMMEDIATELY AFTER THAT OF CANADA. AS SPAIN ONLY RANKS 30TH IN TERMS OF CANADIAN EXPORT MARKETS, THERE IS AMPLE SCOPE TO IMPROVE OUR EXPORT PERFORMANCE. SINCE JOINING THE EEC IN 1986, SPAIN HAS EXPERIENCED A MASSIVE 40 PERCENT INCREASE IN FIXED CAPITAL INVESTMENT INSPIRED BY: MARKET LIBERALIZATION; AVAILABILITY OF SKILLED LABOR AT THREE QUARTERS OF THE EC AVERAGE COST; AND SOUND GOVERNMENT. DURING 1988 SPAIN WILL RECORD INCREASES IN GROSS CAPITAL FORMATION OF 13%, IN INTERNAL DEMAND OF 6.5%, IN IMPORTS OF 15.5%, IN EXPORTS OF 10.5%, IN EMPLOYMENT OF 2.8%, IN PRODUCTIVITY OF 1.8% AND IN DIRECT FOREIGN INVESTMENT OF 30%. ALTHOUGH A CURRENT ACCOUNT DEFICIT OF \$4 BILLION IS EXPECTED IN 1988, IT WILL BE OFFSET BY LONG TERM FOREIGN INVESTMENT OF \$10 BILLION. SPAIN'S FOREIGN EXCHANGE RESERVES OF \$50 BILLION ARE CONSIDERABLY MORE THAN ITS TOTAL FOREIGN DEBT OF \$40 BILLION. INFLATION IS RUNNING AT THE EC NORM OF ABOUT 4.5% ANNUALLY AND THE PUBLIC SECTOR BORROWING REQUIREMENT IS DOWN TO 3% OF GDP. THE MAJOR WEAK SPOT IN THE ECONOMY REMAINS UNEMPLOYMENT WHICH OFFICIALLY STANDS AT 19.8% BUT IN REALITY IS AROUND 16% AS MUCH SEASONAL AND PART-TIME EMPLOYMENT GOES UNREPORTED. TRADE, INVESTMENT AND TECHNOLOGY TRANSFER OPPORTUNITIES IN SPAIN ARE AMONGST THE BEST IN EUROPE IN A WIDE VARIETY OF SECTORS. CANADIAN COMPANIES WITH SPECIALIZED PRODUCTS AND SERVICES WILLING TO ENTER INTO INDUSTRIAL COOPERATION AGREEMENTS ARE PARTICULARLY WELL-RECEIVED BY SPANISH FIRMS AT THIS TIME AS THEY PREPARE FOR INCREASED COMPETITION IN 1992 FOLLOWING THE END OF SPAIN'S TRANSITION PERIOD INTO THE EC AND INTRODUCTION OF THE EC'S UNIFIED MARKET. EXPORT POSSIBILITIES ARE ESPECIALLY GOOD FOR: FISHERIES PRODUCTS, ANIMAL BREEDING STOCK; TREE AND PLANT SEEDLINGS; RESOURCE PRODUCTS SUCH AS WOOD PRODUCTS, ASBESTOS, COPPER ORE, AND IRON AND STEEL PRODUCTS; DEFENCE EQUIPMENT; COMMUNICATIONS EQUIPMENT; MEDICAL AND HOSPITAL EQUIPMENT; AND SPECIALIZED TECHNOLOGY RELATED TO CONTROL AND AUTOMATION SYSTEMS, DISTRIBUTION NETWORKS, BIOTECHNOLOGY, AND NEW MATERIALS. SPAIN WILL HOST BOTH A WORLD FAIR AND THE SUMMER OLYMPICS IN 1992. THESE EVENTS ARE GIVING ADDED IMPETUS TO WHAT WAS ALREADY A MAJOR EFFORT TO DEVELOP AND MODERNIZE SPAIN'S BASIC, INFRASTRUCTURE. BUSINESS PROSPECTS HAVE NEVER BEEN BETTER FOR CANADIAN COMPANIES WHO ARE PREPARED TO MAKE A STRATEGIC COMMITMENT TO THE SPANISH AND EUROPEAN MARKETS AT THIS TIME.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 EXPORT PROMOTION PRIORITIES

Mission: MADRID

Country: SPAIN

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

1. ADVANCED TECH. PROD. & SERV
SPAIN HAS PASSED NEW LAWS REGARDING TELECOMMUNICATIONS AND PRIVATE TV WHICH HAVE LIBERALIZED MARKET ACCESS FOR A VARIETY OF COMMUNICATIONS AND BROADCASTING EQUIPMENT. SPAIN IS ALSO CONSIDERING LAUNCHING ITS OWN COMMUNICATIONS SATELLITE.
2. DEFENCE PROGRAMS, PRODUCTS, SERV
SPAIN IMPORTS APPROXIMATELY \$1 BILLION OF DEFENCE EQUIPMENT ANNUALLY AND IS INTERESTED IN INDUSTRIAL COOPERATION WITH CANADA IN ORDER TO IMPROVE ITS TECHNOLOGICAL BASE.
3. TRANSPORT SYS, EQUIP, COMP, SERV.
URBAN TRANSPORTATION SYSTEMS WILL BE UPGRADED IN BARCELONA FOR THE 92 OLYMPICS AND IN SEVILLE FOR THE 92 WORLD'S FAIR. THIRD LEVEL AIRLINES AND RAILWAY MODERNIZATION ARE ALSO PLANNED.
4. INDUSTRIAL MACHIN, PLANTS, SERV.
SPAIN IMPORTS SOME \$11 BILLION OF INDUSTRIAL MACHINERY ANNUALLY. OPPORTUNITIES FOR SALES AND INDUSTRIAL COOPERATION IN AREAS SUCH AS POLLUTION CONTROL, WATER TREATMENT AND CONSTRUCTION EQUIPMENT ARE EXCELLENT.
5. FISHERIES, SEA PRODUCTS & SERV.
SPAIN IS THE LARGEST CONSUMER FISHERIES PRODUCTS IN WESTERN EUROPE. ANNUAL IMPORTS ARE \$1600 MILLION. CANADIAN FISHERIES PRODUCTS ENJOY IMPROVED ACCESS SINCE SPAIN JOINED THE EC AND THE DOLLAR HAS DEPRECIATED SIGNIFICANTLY.
6. EDUCATION, MEDICAL, HEALTH PROD
SPANISH GOVERNMENT IS COMMITTED TO IMPROVING HEALTH CARE SERVICES AND CDA IS VIEWED AS A MODEL. SPANISH IMPORTERS AND MANUFACTURERS FACE GROWING COMPETITION WITHIN THE EC AND ARE LOOKING FOR NEW, COMPETITIVE PRODUCTS.

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

- | | |
|--------------------------------------|------------------------------------|
| 1. MINE, METAL, MINERAL PROD & SRV | 4. AGRI & FOOD PRODUCTS & SERVICE |
| 2. FOREST PRODUCTS, EQUIP, SERVICES | 5. ADVANCED TECH. PROD. & SERV |
| 3. TRANSPORT SYS, EQUIP, COMP, SERV. | 6. FISHERIES, SEA PRODUCTS & SERV. |

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MADRID

Market: SPAIN

Sector : FISHERIES, SEA PRODUCTS & SERV.

Sub-Sector: FISH & SHELLFISH & OTHER PROD

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	780.00 \$M	1585.00 \$M	1743.00 \$M	1917.00 \$M
Canadian Exports	0.77 \$M	5.49 \$M	7.00 \$M	9.00 \$M
Canadian Share of Market	0.98 %	0.35 %	0.40 %	0.47 %

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

Major Competing Countries	Market Share
SPAIN	50.00 %
EUROPEAN COMMON MARKET C	18.00 %
ARGENTINA	3.00 %
MOROCCO	2.00 %
CHILE	2.00 %
ICELAND	2.00 %

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

Products/services for which there are good market prospects:

1. WET-SALTED COD INCLUDING FILLETS
2. FROZEN FLJUNDER, PLAICE & SIMILAR
3. FRESH & FROZEN COD, INCLUDING FILLETS
4. LIVE CLAM
5. LIVE LOBSTER
6. FROZEN SALMON
7. FROZEN FISH BLOCKS, VARIOUS SPECIES
8. FROZEN ILLEX SQUID
9. FROZEN MONKFISH TAILS
10. LIVE GOUSENECK BARNACLES
11. CANNED SALMON
12. FROZEN SHRIMPS

Factors contributing to current successful Canadian exports:

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

29/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MADRID

Market: SPAIN

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- LITTLE CDN INTEREST IN MARKETING
- POTENTIAL FOR FISH PROD. IN SPAIN

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

Activity: CONTACTS WITH SPANISH IMPORTERS, PROVIDING PRODUCT INFORM.
Expected Results: TRADE LINKS WILL BE IMPROVED STEADILY .

Activity: ORGANIZE RETURN VISIT BY NWFLD DELEGATION TO BASQUE FISHING
Expected Results: PRODUCT SALES, MARKETING AND INDUSTRIAL COOPERATION IN AGREEMENTS

Activity: ARTICLE ON FISH MARKET IN SPAIN - FOR CDN INDUSTRIES
Expected Results: ENCOURAGE CDN SUPPLIERS TO TAKE A MORE ACTIVE INTEREST IN SPANISH MARKET

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

Activity: SPANISH FISH BUYER'S MISSION TO MARITIMES
Expected Results: \$2 M IN NEW SALES

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

Activity: CONTACTS WITH SPANISH FISHING CO. INTERESTED IN CDN FISHERIES
Expected Results: IMPROVE ACCESS TO SPANISH MARKET AND THIRD COUNTRY MARKETS TRADITIONALLY SERVICED BY SPANISH COMPANIES

Activity: ORGANIZED INCOMING SPANISH VETERINARY MISSION TO CANADA
Expected Results: CONTINUED ACCESS FOR CDN BREEDING STOCK

Activity: MARKET RESEARCH-CDN FEED PEAS AND FORAGE
Expected Results: DETERMINATION OF WHETHER MARKET EXISTS.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MADRID

Market: SPAIN

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	800.00 \$M	1000.00 \$M	1200.00 \$M	1400.00 \$M
Canadian Exports	3.00 \$M	12.00 \$M	5.00 \$M	20.00 \$M
Canadian Share of Market	0.40 %	1.20 %	0.40 %	1.40 %

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

Major Competing Countries	Market Share
SPAIN	40.00 %
UNITED STATES OF AMERICA	25.00 %
FRANCE	20.00 %
GERMANY WEST	5.00 %
UNITED KINGDOM	4.00 %

Products/services for which there are good market prospects:

1. CL 215 AIRCRAFT
2. M 41 TANK DIESEL KITS
3. INFRA-RED-SUPPRESSION SYSTEM
4. ATC EQP
5. RADIOS
6. ASW EQPT
7. NFR-90 PROGRAM

Factors contributing to current successful Canadian exports:

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

29/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MADRID

Market: SPAIN

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- Limited Canadian capabilities
- Market prospects have not been adequately explored
- UNPREPARED CDN CO TO ENTER INTO
- INDUSTRIAL CO-UP AGREEMENTS

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

Activity: CONTACTS WITH MOD PURCHASING DIRECTORATES, ASSOC OF DEFENCE
Expected Results: STIMULATE SPANISH DECISION-MAKERS TO CONSIDER CDN CO. AS JOINT VENTURE PARTNERS ON NEW MAJOR DEVELOPMENT PROGRAMS.

Activity: ASSIST CANADAIR IN ITS EFFORTS TO CONVINCE FOREST PROTECT.
Expected Results: THERE IS POTENTIAL FOR \$100 MILLION SALE

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

Activity: ENCOURAGE SPANISH DEFENCE MANU. ASS. TO TAKE MISSION TO CDA
Expected Results: NEW INDUSTRIAL COOPERATION AGREEMENTS BETWEEN CDN AND SPANISH CO.

Activity: PREPARE NEW MARKET GUIDE/CONTACT LIST FOR DISTRIB. AT HI-TEC
Expected Results: ASSIST 5 CDN COMPANIES TO FIND REPRESENTATION IN SPAIN

29/05/89

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MADRID

Market: SPAIN

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

EUROPEAN FIGHTER AIRCRAFT

Approximate Value: 4000 M\$

Financing Source : DDM - Domestically funded

Contact : B. WOOLHAM (613) 996-0639

NATO FRIGATE REPLACEMENT
(NFR-90)

Approximate Value: 10000 M\$

Financing Source : DDM - Domestically funded

Contact : B. WOOLHAM (613) 996-0639

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MADRID

Market: SPAIN

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	4120.00 \$M	5192.00 \$M	5711.00 \$M	6625.00 \$M
Canadian Exports	7.80 \$M	8.70 \$M	10.20 \$M	12.30 \$M
Canadian Share of Market	0.19 %	0.17 %	0.18 %	0.19 %

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

Major Competing Countries Market Share

SPAIN	46.00 %
EUROPEAN COMMON MARKET C	28.00 %
UNITED STATES OF AMERICA	10.00 %
JAPAN	7.00 %
ASIA OR FAR EAST	6.00 %
OTHER COUNTRIES	3.00 %

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

Products/services for which there are good market prospects:

1. COMPUTERS, SOFTWARE AND SYSTEMS
2. BROADCAST, INCL. CATV, ETC.
3. TELECOMMUNICATION EQUIPMENT
4. WORK PLACE AUTOMATION
5. ELECTRONIC COMPONENTS

Factors contributing to current successful Canadian exports:

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

29/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MADRID

Market: SPAIN

Factors for Canadian exports not reaching market potential:

- Market prospects have not been adequately explored
- TRARIFFS & HOMOLOGATION REQUIREMENT
- CDN PRODUCTS-NOT ADAPTED TO LAW

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

Activity: REPORT ON NEW TELECOMMUNICATION LAW WHICH HAS BEEN APPROVED
Expected Results: LAW IMPROVES MARKETS FOR ACCESS FOR BROAD RANGE OF CDN PRODUCTS

Activity: ASSIST IMAX CORP TO FOLLOW UP ON LEAD FOR THEATRES
Expected Results: PROSPECTS ARE GOOD FOR THE SALE OF TWO OR THREE THEATRES

Activity: ASSIST CDN CO. IN THEIR EFFORTS TO SELL COMMUNICATION EQPT.
Expected Results: SALES OF SEVERAL MILLION DOLLARS

Activity: PREPARE ARTICLE-COMPUTER SOFTWARE MARKET IN SPAIN
Expected Results: INTEREST FIVE NEW COMPANIES IN THE SPANISH MARKET

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

Activity: OFFICIAL STAND AT INFORMAT 89 IN BARCELONA
Expected Results: APPOINTMENTS OF AGENTS BY 3 CDN COMPANIES

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

Activity: ASSIST SPAR, TELESAT ETC TO PARTICIPATE IN COMM. SATELLITE
Expected Results: CDN PARTICIPATION COULD RESULT IN UP TO \$200 MILLION IN SALES

Activity: DETERMINE OPPORTUNITIES IN STAR RURAL COMMUNICATIONS PROJECT
Expected Results: POSSIBLE CDN PARTICIPATION IN THIS \$300 MILLION PROJECT

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MADRID

Market: SPAIN

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

SPANISH COMMUNICATIONS
SATELLITE

Approximate Value: 300 M\$
Financing Source : DOM - Domestically funded
EDC - Export Dev Corporation
Contact : M. WONDERGEM (613) 995 6440

STAR RURAL COMMUNICATIONS
PROJECT

Approximate Value: 300 M\$
Financing Source : DOM - Domestically funded
EDC - Export Dev Corporation
Contact : D. WISMER TLX:27347 DOMCA E

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MADRID

Market: SPAIN

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	2700.00 \$M	3200.00 \$M	3800.00 \$M	4000.00 \$M
Canadian Exports	7.00 \$M	3.00 \$M	10.00 \$M	12.00 \$M
Canadian Share of Market	0.28 %	0.10 %	0.25 %	0.30 %

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

Major Competing Countries

Market Share

SPAIN	70.00 %
FRANCE	10.00 %
GERMANY WEST	10.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. URBAN TRANSIT
2. FLIGHT SIMULATORS
3. COMMUTER AIRCRAFT
4. CONSULTING SERVICES
5. LOCOMOTIVE PARTS
6. RAILWAY EQUIPMENT

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Provincial export promotion
- Competitive pricing
- Canada is one of few sources of supply
- willingness of exporters to invest/joint venture in territory

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MADRID

Market: SPAIN

Factors for Canadian exports not reaching market potential:

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

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

Activity: COORDINATE MARKETING EFFORTS OF CDN SUPPLIERS OF URBAN TRAN.
Expected Results: SUBMISSION OF COMPETITIVE JOINT-VENTURE BID FOR URBAN TRANS-IT IN BARCELONA.

Activity: MARKETING ASSISTANCE TO CAE ON FLIGHT SIMULATORS FOR IBERIA
Expected Results: POSSIBLE SALE OF 3 SIMULATORS

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

Activity: PROMOTE CDN AIRCRAFT & CONSULTING SERVICES & EDC FINANCING
Expected Results: GENERATION OF A NUMBER OF REQUESTS FOR PROPOSALS

Activity: DISCUSS IMPORT REQUIRE. IN CONNECTION WITH RAILWAY MODERN.
Expected Results: CDN SUPPLIERS WILL BE ADVISED OF ANY OPPORTUNITIES

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MADRID

Market: SPAIN

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

MODERNIZATION OF SPANISH
RAILWAY SYSTEM

Approximate Value: 10000 Ms
Financing Source : DOM - Domestically funded
Contact : D. WISMER TLX 27347 DOMCA E
M. WONDERGEM (613) 995-6440

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MADRID

Market: SPAIN

Sector : EDUCATION, MEDICAL, HEALTH PROD

Sub-Sector: PHARMACEUTICALS, BIOTECHNOLOGY

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1700.00 \$M	1086.00 \$M	1100.00 \$M	1200.00 \$M
Canadian Exports	3.50 \$M	3.00 \$M	3.20 \$M	3.60 \$M
Canadian Share of Market	0.20 %	0.28 %	0.29 %	0.30 %

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

Major Competing Countries

Market Share

SPAIN	38.00 %
GERMANY WEST	16.00 %
UNITED STATES OF AMERICA	10.00 %
UNITED KINGDOM	9.00 %
FRANCE	8.00 %
ITALY	8.00 %

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

Products/services for which there are good market prospects:

1. HEALTH CARE AND HOSPITAL PRODUCTS
2. PHARMACEUTICAL PRODUCTS

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Fairs and Missions support
- Provincial export promotion
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- Willingness of exporters to invest/joint venture in territory

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MADRID

Market: SPAIN

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Market prospects have not been adequately explored
- LACK ON INTEREST BY CDN COMPANIES
- REGISTRATION-TIME CONSUMING

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

Activity: SURVEY - I.D. SPECIFIC SECTORS OFFERING OPPORTUNITIES
Expected Results: IMPROVE OUR CAPACITY TO SOURCE POTENTIAL EXPORTERS IN CDA
INFORM EXPORTERS OF LOCAL OPPORTUNITIES

Activity: VISIT BARCELONA TO CALL ON MAJOR IMPORTERS IN SECTOR
Expected Results: INFORM IMPORTERS OF AVAILABILITY OF CDN PRODUCTS AND DETER-
MINE THEIR INTEREST

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

Activity: INVITE SECTOR SPECIALIST TO ASSIST IN GENERAL MARKET SURVEY
Expected Results: IMPROVE OUR CAPACITY TO SOURCE POTENTIAL EXPORTERS IN CDA.
INFORM EXPORTERS OF LOCAL OPPORTUNITIES.

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MADRID

Market: SPAIN

Sector : INDUSTRIAL MACHIN, PLANTS, SERV.

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	6600.00 \$M	7920.00 \$M	10900.00 \$M	13400.00 \$M
Canadian Exports	13.10 \$M	13.80 \$M	16.90 \$M	18.50 \$M
Canadian Share of Market	0.24 %	0.18 %	0.16 %	0.14 %

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

Major Competing Countries	Market Share
SPAIN	45.00 %
GERMANY WEST	15.00 %
UNITED STATES OF AMERICA	9.00 %
FRANCE	9.00 %
ITALY	6.00 %
UNITED KINGDOM	6.00 %

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

Products/services for which there are good market prospects:

1. WASTE AND WATER TREATMENT EQUIPMENT
2. POLLUTION CONTROL
3. CONSTRUCTION EQUIPMENT
4. ROBOTICS AND INDUSTRIAL AUTOMATION
5. INDUSTRIAL HEAT PUMP SYSTEMS

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Fairs and Missions support
- Provincial export promotion
- Willingness of exporters to invest/joint venture in territory

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MADRID

Market: SPAIN

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Non-competitive financing
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored

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

Activity: FOLLOW-UP WITH CDTI ON BEHALF OF NRC TECH. TRANSFER OPPORT.
Expected Results: 6/8 TECHNOLOGY AGREEMENTS

Activity: FOLLOW-UP WITH CANARIES GOV'T RE MONENCO PROP.-POWER PLANT
Expected Results: SHOULD PROJECT GO AHEAD SEVERAL CDN EQUIPMENT SUPPLIERS
WOULD HAVE OPPORTUNITY TO BID SUPPLY MACHINERY.

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

Activity: SURVEY-I.D. PRODUCTS/SERVICES-WASTE/WATER/POLLUTION EQUIPMT.
Expected Results: INDUCE 8 CDN COMPANIES TO UNDERTAKE NEW MARKETING ACTIVITY
IN SPAIN

Activity: ORGANIZE VISIT TO CDA-IMPORTERS/MUNICIPAL-POLLUTION CONTROL
Expected Results: 3/4 JOINT VENTURE AGREEMENTS, TWO CONSULTING SERVICE
OPPORTUNITIES & 20M IN POTENTIAL SALES

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RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: MADRID

Country: SPAIN

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

	Total (\$ Million)	Canadian Share	Major Competitor Share
Current year	2000.00	0.05	40.00
One year ago	2500.00	0.10	64.00
Two years ago	3000.00	0.10	65.00

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

DIRECT-\$30MILLION PORTFOLIO - \$20 MILLION

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

- HULLAND
- FRG
- PORTUGAL
- USA
- FRANCE
- UK

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

- CORPORATE CALLING PROGRAM UNDERTAKEN ON PART-TIME BASIS BY LOCALLY ENGAGED DUTCH NATIONAL ON BEHALF ON INVESTMENT DEVELOPMENT OFFICE IN DUTCH MIN OF ECONOMIC AFFAIRS.
- RESPONSIVE COUNSELLING
- PART OF GENERAL PUBLICITY EFFORT - NO MAJOR PROGRAM

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: MADRID

Country: SPAIN

Compared to major competitive destinations, Canada is perceived to have

the following advantages:

- ACCESS TO NORTH AMERICAN MARKETS
- EASE OF DOING BUSINESS
- AVAILABILITY OF SKILLED LABOR, LOW COST ENERGY, HIGH TECHNOLOGY
- AVAILABILITY OF SKILLED LABOR, LOW COST ENERGY, HIGH TECHNOLOGY

the following constraints:

- LACK OF KNOWLEDGE ABOUT CANADA
- DISTANCE
- LANGUAGE/CULTURE

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

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

The mission believes that the following sectors are of greatest interest to investors in its territory/country with an assigned ranking of 1-10:

Sector	Ranking
Agriculture/Food/Fish	3
Resource Processing	1
Machinery and Equipment	5
Consumer Products	4
Commercial Service	8
Computer and Communications	7
Health Care Products/Medical	6
Aerospace and Defence	2

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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: MADRID

Country: SPAIN

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

	Date
Type: MISSION OUT, INDUSTRY	
MISSION LED BY NEWFOUNDLAND MIN OF FISHERIES	10/89
Location: VIGO/SAN SEBASTIAN	
Invest Nature: STRAT. PARTNER	
JT VENTURE	
TECH LICENCING	
Sector: FISHERIES, SEA PRODUCTS & SERV.	
Cooperants: NEWFOUNDLAND GOVT BASQUE/GALICIAN GOVTS	
Estimated Budget: \$4,000.00	
Type: SEMINAR, ABRDAD	
SEMINAR WHOULD INTRODUCE CDN/SPAN COUNTERPART ORGANIZATIONS TO PRODUCE TWO-WAY INVESTMENT FLOWS	2/90
Location: BARCELONA	
Invest Nature: PORTFOLIO	
Sector: MULTIPLE SECTORS	
Cooperants: SPANISH & CDN INVESTMENT DEALERS ASSOCIATIONS	
Estimated Budget: \$4,000.00	
SENIOR CANADIAN OFFICIAL TO HEADLINE SEMINAR	5/89
Location: MADRID SPAIN	
Invest Nature: ALL TYPES	
Sector: MULTIPLE SECTORS	
Cooperants: CEDE ICEX	
Estimated Budget: \$4,000.00	
Type: MISSION IN, TO INDUSTRY	
PRES OF SPAN STATE OIL CO - REPSOL PLANS TO VISIT CANADA	4/89
Location: OTTAWA TORONTO CALG.	
Invest Nature: ACQUISITION	
JT VENTURE	
STRAT PARTNER	
Sector: MULTIPLE SECTORS	
Cooperants: REPSOL EMER PETRO - CANADA	
Estimated Budget: \$0.00	
Total estimated budget for all proposals:	\$12,000.00

Post : MADRID

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Post/Contact</u>
89/06/04	MINT MISSION TO SPAIN MISSION OUT, INDUSTRY	SERVICE INDUSTRIES G.COTE
89/06/05	INFORMAT'89 - COMPUTER SHOW, BARCELONA, SPAIN FAIR, NATIONAL STAND	ADVANCED TECH. PROD. & SERV G.COTE/H.SCHROETER
89/09/00	COMMUNICATIONS MISSION TO CDN COMPUTER SHOW/T.O. FR SPAIN MISSION IN, TO FAIR	ADVANCED TECH. PROD. & SERV
89/11/00	C.E.O.E. EXECUTIVES TO ONT.& QUE. MISSION IN, TO INDUSTRY	GENERAL OR UNASSIGNED ISB
90/03/00	ENVIRONMENTAL CONTROL MISSION FR SPAIN TO GLOBE'90 VANC. MISSION OUT, INDUSTRY	INDUSTRIAL MACHIN, PLANTS, SERV

RPT81

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: OSLO

Country: ICELAND

WITH A POPULATION OF ONLY 240,000, ICELAND HAS NOT BEEN A MAJOR EXPORT MARKET FOR CANADIAN GOODS AND SERVICES. PRIOR TO 1987, TOTAL ANNUAL CANADIAN EXPORTS TO ICELAND WERE TRADITIONALLY AROUND THE CDN \$3 MILLION MARK, WITH WHEAT AND FLOUR PRODUCTS ACCOUNTING FOR APPROXIMATELY ONE-THIRD OF THE TOTAL. IN 1987, CANADIAN EXPORTS JUMPED TO \$10.4 M, AND \$10.8 IN 1988, WITH A VARIETY OF CONSUMER PRODUCTS ACCOUNTING FOR THIS TOTAL. ICELAND IS FAR FROM BEING SELF-SUFFICIENT AND IMPORTS A LARGE PERCENTAGE OF ITS REQUIRED GOODS AND SERVICES. THE C.I.F. VALUE OF IMPORTS TO ICELAND IN 1987 TOTALLED ABOUT US \$1.9 BILLION. OF THIS TOTAL ABOUT 40% WAS SPENT ON CONSUMER GOODS, 30% ON PRIMARY PRODUCTS AND INTERMEDIATE GOODS, AND 30% ON INVESTMENT GOODS. FOR THE MOST PART, EXPORT ITEMS ARE FREE OF RESTRICTION. THE STANDARD OF LIVING ENJOYED BY ICELANDERS IS COMPARABLE WITH THAT OF SCANDINAVIANS AND NORTH WESTERN EUROPEANS. IN SPITE OF ITS SMALL SIZE (OR PERHAPS BECAUSE OF IT) ICELAND IS TECHNOLOGICALLY WELL ADVANCED AND OFFERS OPPURTUNITIES IN TELECOMMUNICATIONS, ELECTRONICS AND OFFICE EQUIPMENT FIELD. HOWEVER, 1988 HAS SEEN A RADICAL CHANGE IN THE ECONOMIC ENVIRONMENT IN ICELAND. THE DECLINING VALUE OF THE FISH CATCH, POOR PROFITABILITY OF THE EXPOSED SECTORS, A CONTINUING CURRENT ACCOUNT DEFICIT AND DOUBLE DIGIT INFLATION HAVE FORCED THE GOVERNMENT TO: A) IMPOSE A PRICE FREEZE ON ALL GOODS AND SERVICES; B) FREEZE WAGES UNTIL FEBRUARY, 1989; C) DEVALUE THE ICELANDIC KRONA; D) REDUCE CENTRAL BANK INTEREST RATES E) SUBSIDIZE PRODUCTION OF FROZEN FISH PRODUCTS AND SCALLOPS; AND, F) ASSIST EXPORTERS THROUGH DEBT RESCHEDULING.

1988 FISH CATCH RESULTS ARE EXPECTED TO CONTRACT BY 2% WITH A FURTHER PROJECTED REDUCTION OF 4.5% IN 1989. FORECASTS GENERALLY FOR 1989 ARE RATHER PESSIMISTIC AFTER SEVERAL YEARS OF OUTSTANDING GROWTH WITH HIGHER INFLATION AND LOWER EXPORT EARNINGS. HOWEVER, BY WORKING WITH THE APPROXIMATELY 250-300 IMPORTING FIRMS IN ICELAND COMMERCIAL AND MARKET NICHEs DO EXIST FOR CANADIAN EXPORTER. THE COMMERCIAL DIVISION AT THE EMBASSY IN OSLO WILL CONTINUE TO RESPOND TO BOTH CANADIAN AND ICELANDIC REQUESTS FOR INFORMATION ON MARKETING OPPORTUNITIES IN ALL SECTORS.

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: OSLO

Country: NORWAY

THE NORWEGIAN ECONOMY HAS PERFORMED UNDER VERY MIXED REVIEWS DURING THE PAST YEAR AND WILL REMAIN RELATIVELY SLUGGISH INTO 1989. THE BETTER THAN EXPECTED PERFORMANCE OF EXTERNAL ECONOMIES HAS ENABLED NORWAY TO MAINTAIN AND IN FACT INCREASE EXPORTS IN SOME TRADITIONAL SECTORS WHILE ITS DOMESTIC ECONOMY HAS AT THE SAME TIME SUFFERED A SLOWDOWN. THE NET RESULT LEAVES NORWAY WITH A LESS THAN EXPECTED CURRENT ACCOUNT DEFICIT, APPROXIMATELY CAD.6 BILLION IN 1988, BUT ONE THAT AS A PERCENTAGE OF GDP IS SIGNIFICANTLY HIGHER THAN IN ANY OTHER OECD COUNTRY. FULL EMPLOYMENT CONTINUES TO BE A PRIME POLICY OBJECTIVE OF THE NORWEGIAN GOVERNMENT BUT EVENTS OVER THE PAST YEAR HAVE CAUSED UNEMPLOYMENT LEVELS TO RISE. THE CONTINUING DROP IN CONSUMER SPENDING, 5% IN 1988 COMPARED TO 1987, LOWER OIL PRICES AND STAGNANT RESULTS IN SOME INDUSTRIES HAVE LED TO A RISE IN UNEMPLOYMENT TO 2.5% WITH FURTHER INCREASES EXPECTED. HOWEVER, THIS TREND COUPLED WITH INCOME REGULATIONS INTRODUCED BY THE GOVERNMENT IN MARCH, 1988, SHOULD RESULT IN CONTINUING WAGE LEVEL CONTROL THAT WILL ENSURE HOURLY WAGES WILL NOT BE HIGHER THAN NORWAY'S MAJOR TRADING PARTNERS THUS ENABLING NORWAY TO BE MORE COMPETITIVE. THE ANNUAL RATE OF INFLATION IS EXPECTED TO FALL BY THE END OF 1988 TO A LEVEL OF 5% AND AN EVEN FURTHER DECELERATION IN 1989 APPEARS POSSIBLE. STRONG PERFORMANCE BY THE METAL INDUSTRIES, AND RAPID GROWTH OF OIL PRODUCTION HAVE BOOSTED GDP GROWTH IN 1988 TO OVER 3%. HOWEVER, PREDICTIONS FOR 1989 CALL FOR A WORSENING BALANCE OF PAYMENTS AND GDP GROWTH DECLINE TO BELOW 3% AS CAPACITY LIMITS ARE PRESSED.

WHILE NORWAY'S ECONOMY WAS ASSISTED BY STRONG EXTERNAL FACTORS, INVESTMENT GROWTH IN NORWAY AND ABROAD GENERALLY SPEAKING HAS DECLINED. OIL AND GAS INVESTMENTS CONTINUE TO LEAD THE WAY HOWEVER INVESTMENTS IN COMMERCIAL BUILDINGS AND HOUSEHOLDS ARE REDUCING SUBSTANTIALY. AS WELL EXTERNAL INVESTMENT IS SLOWING. TOTAL NORWEGIAN DIRECT INVESTMENTS IN THE EEC DECLINED BY 40% IN THE FIRST EIGHT MONTHS OF 1988 COMPARED WITH 1987. AS BEFORE, NORWAY MUST CONTINUE TO DEVELOP MORE EFFICIENT MEANS OF PRODUCTION IN ALL SECTORS INCLUDING OIL AND GAS THUS GIVING OPPORTUNITIES FOR CANADIAN EXPORTERS IN SEVERAL AREAS. EMBASSY EXPORT PROMOTIONAL ACTIVITY WILL CONCENTRATE ON THE FOLLOWING SECTORS: DEFENCE PROGRAMS AND PRODUCTS (INCLUDING AEROSPACE); COMPUTERS, SOFTWARE AND SYSTEMS; BROADCASTING INCLUDING CATV; TELECOMMUNICATIONS INCLUDING SPACE; AND OIL AND GAS EQUIPMENT AND SERVICES.

RPT82

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 EXPORT PROMOTION PRIORITIES

Mission: OSLO

Country: NORWAY

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

1. DEFENCE PROGRAMS, PRODUCTS, SERV
THE MINISTRY OF DEFENCE, IN IT 1989-93 FIVE-YEAR PLAN, HAS ALLOCATED NOK.27 BILLION (CAD.5BLN) FOR INVESTMENTS IN MATERIAL. THIS IS A NOK .6 MILLION INCREASE OVER THE PREVIOUS PERIOD. HISTORICALLY, NORWAY PURCHASES 50-80% OF ITS DEFENCE REQUIREMENTS FROM ABROAD.
2. OIL & GAS EQUIPMENT, SERVICES
NORWAY CONTINUES TO LOOK FOR MORE EFFICIENT METHODS TO EXTRACT ITS KNOWN OFFSHORE OIL AND GAS RESERVES. OPPORTUNITIES EXIST AS WELL IN POSSIBLE ONSHORE GAS PIPE LINE DEVELOPMENT. NORWEGIAN TECHNOLOGY WILL ALSO BE IMPORTANT FOR THE HIBERNIA DEVELOPMENT OFF NEWFOUNDLAND.
3. ADVANCED TECH. PROD. & SERV
MARKET DEREGULATION CONTINUES TO PROVIDE OPPORTUNITIES FOR AGGRESSIVE FIRMS IN THE COMMUNICATIONS SECTOR. AS WELL, COMPUTER SOFTWARE AND HARDWARE ARE ALSO IN GROWING DEMAND.

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

1. MINE, METAL, MINERAL PROD & SRV
2. GRAINS AND OILSEEDS
3. DEFENCE PROGRAMS, PRODUCTS, SERV
4. OIL & GAS EQUIPMENT, SERVICES

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: OSLO

Market: NORWAY

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	600.00 \$M	650.00 \$M	700.00 \$M	750.00 \$M
Canadian Exports	5.00 \$M	2.00 \$M	4.00 \$M	4.00 \$M
Canadian Share of Market	0.80 %	0.30 %	0.60 %	0.50 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	40.00 %
GERMANY WEST	25.00 %
SWEDEN	25.00 %
UNITED KINGDOM	7.50 %
FRANCE	7.50 %

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

Products/services for which there are good market prospects:

1. COMMUNICATIONS & ELECT. EQUIPMENT
2. ENGINES & PARTS
3. PROTECTIVE & MEDICAL EQUIPMENT
4. QUARTMASTER STORES
5. AMMUNITION & EXPLOSIVES
6. SMALLER UNIT WEAPONS SYSTEMS & SMALL ARMS

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Competitive pricing
- Strong sectoral capability in Canada
- Bilateral economic trade agreement

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: OSLO

Market: NORWAY

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- EXPORTERS HAVE NOT EXAMINED MKT
- CLOSELY ENOUGH TO FIND OPPS.

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

Activity: FOLLOW UP ON DEFENCE TRADE MISSION TO NORWAY, NOV/88
Expected Results: NEW AGENCY AGREEMENTS & IDENTIFICATION OF MKT NICHES FOR MISSION MEMBERS

Activity: FOLLOW UP ON RDP MEETING SCHEDULED FOR FALL.
Expected Results: IDENTIFICATION OF NEW MARKET OPPORTUNITIES FOR CDN EXPORTER

Activity: CONT CALLS ON DEFENCE-RELATED IMP AGENTS, PRIME CONTRACTORS
Expected Results: INCREASE AWARENESS IN NORWAY OF CDN EXPERTISE.

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

Activity: ENCOURAGE NORWEGIAN PARTICIPATION & ATTEND ARM-X.
Expected Results: INCREASE AWARENESS IN NORWAY OF CDN EXPERTISE.

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

Activity: ENCOURAGE NORWEGIAN MINISTRY OF DEFENCE OFFICIALS TO VIS CAN
Expected Results: INCREASED AWARENESS OF CDN CAPABILITY

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: OSLO

Market: NORWAY

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

MINE COUNTER MEASURE VESSELS
FOR ROYAL NORWEGIAN NAVY

Approximate Value:

0 M\$

Financing Source :

Contact

: CDN EMBASSY, OSCARS GATE 20
0352 OSLO 3, NOR FAX 47-2-69

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DSLO

Market: NORWAY

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: TELECOM, DATACOM, SAT, SPACECOM

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	232.00 \$M	270.00 \$M	230.00 \$M	220.00 \$M
Canadian Exports	4.40 \$M	6.00 \$M	6.00 \$M	6.00 \$M
Canadian Share of Market	2.00 %	2.50 %	2.50 %	3.00 %

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

Major Competing Countries Market Share

SWEDEN	26.00 %
GERMANY WEST	25.00 %
ITALY	19.00 %
BELGIUM	8.00 %

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

Products/services for which there are good market prospects:

1. PABX
2. SWITCHING EQUIPMENT
3. RADARSAT

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: OSLO

Market: NORWAY

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

Activity: FOLLOW-UP WITH NORWEGIAN SPACE AGENCY RE DEVEL RADARSAT PROJ
Expected Results: NORWAY WILL PARTICIPATE IN RADARSAT PROJECT.

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

Activity: DEVELOP CONTACTS WITH ANDYA ROCKET CENTRE.
Expected Results: POSSIBLE CDN PARTICIPATION IN NORWEGIAN SPACE PROGRAMME.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: OSLO

Market: NORWAY

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: COMPUTERS HARD/SOFTWARE & COMP

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	800.00 \$M	870.00 \$M	825.00 \$M	800.00 \$M
Canadian Exports	6.00 \$M	7.00 \$M	7.00 \$M	7.00 \$M
Canadian Share of Market	0.70 %	0.70 %	0.80 %	0.90 %

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

Major Competing Countries Market Share

UNITED STATES OF AMERICA	31.00 %
UNITED KINGDOM	11.00 %
JAPAN	0.00 %
GERMANY WEST	8.00 %
SWEDEN	8.00 %

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

Products/services for which there are good market prospects:

1. SOFTWARE
2. DATA COMMUNICATIONS

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Provincial export promotion
- Competitive pricing
- Competitive Canadian financing

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Limited Canadian capabilities

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: OSLO

Market: NORWAY

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

Activity: FOLLOW-UP ADVANCED TECHNOLOGY MISSION FALL 1988
Expected Results: 3-4 AGENCY AGREEMENTS

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

Activity: ADVANCED TECHNOLOGY MISSION (OUTGOING), NOV/89
Expected Results: 3-4 AGENCY AGREEMENTS

Activity: ATTEND CEBIT 90, HANNOVER
Expected Results: ESTABLISH NEW CONTACTS

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

Activity: ATTEND SOFTWARE 90, OSLO, & CAD/CAM FAIR, OSLO 1989
Expected Results: IDENTIFY NEW MARKET POSSIBILITIES

Activity: ATTEND MICRODATA, OSLO MAY/89
Expected Results: IDENTIFY NICHEs FOR PL EQUIPMENT & SOFTWARE

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: OSLO

Market: NORWAY

Sector : OIL & GAS EQUIPMENT, SERVICES

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	2000.00 \$M	2000.00 \$M	2000.00 \$M	2000.00 \$M
Canadian Exports	4.50 \$M	4.00 \$M	4.00 \$M	4.00 \$M
Canadian Share of Market	0.20 %	0.20 %	0.20 %	0.20 %

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

Major Competing Countries	Market Share
UNITED KINGDOM	32.00 %
UNITED STATES OF AMERICA	16.00 %
FRANCE	12.00 %
NETHERLANDS	10.00 %
GERMANY WEST	7.00 %
OTHER COUNTRIES	12.00 %

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

Products/services for which there are good market prospects:

1. SUBSEA TECHNOLOGY
2. PRODUCTION SYSTEMS
3. RESERVOIR STIMULATION TECHNOLOGY
4. DRILLING EQUIPMENT
5. COLD WATER TECHNOLOGY
6. GAS PIPELINE TECHNOLOGY
7. GAS DETECTION EQUIPMENT
8. SAFETY SYSTEMS
9. ENVIRONMENT CONTROL SYSTEMS
10. DOWNHOLE EQUIPMENT
11. DATA LOGGING/ACQUISITION
12. INSTRUMENTATION

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: OSLO

Market: NORWAY

Factors contributing to current successful Canadian exports:

- Import duties are moderate
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Trade Fair activity
- Provincial export promotion
- Strong sectoral capability in Canada
- Competitive Canadian financing

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Non-competitive pricing
- Lack of promotion and advertising

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

Activity: COMP CALLS ON LARGEST IMPORTERS & SUPPLIERS
Expected Results: IDENTIFY LIST OF NEW AGENCIES

Activity: PROMOTION OF CDN COLD CLIMATE TECHNOLOGY
Expected Results: POSITIONING CDN COMP. FOR FUTURE PROJECTS IN NORTHERN AREA

Activity: MONITOR POTENTIAL GAS PIPELINE CONSTRUCTION PROJECTS
Expected Results: INFORM COMP. OF OPPORTUNITIES FOR CO-OPERATION

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

Activity: CANADA-NORWAY OFFSHORE WORKING GROUP
Expected Results: IDENTIFY OPPORTUNITIES FOR JOINT CO-OPERATION

Activity: INTER-CAN 89, EDMONTON
Expected Results: 2-3 NORWEGIAN FIRMS TO ATTEND SHOW

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: OSLO

Market: NORWAY

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

Activity: ASSIST CDN FIRMS IN FINDING APPROP NORWEGIAN PARTNERS
Expected Results: NEW JOINT VENTURES & POSSIBLE NEW OPPORTUNITIES FOR SALE TO NORWAY

Activity: ENCOURAGE NORWAY COMP TO ATTEND OFFSHORE NEWFOUNDLAND 89
Expected Results: 6 NORWEGIAN COMP TO ATTEND EXHIBITION

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: OSLO

Market: NORWAY

Sector : CONSUMER PRODUCTS & SERVICES

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

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	50.00 \$M	42.00 \$M	38.00 \$M	35.00 \$M
Canadian Exports	2.00 \$M	25.00 \$M	2.50 \$M	3.00 \$M
Canadian Share of Market	4.00 %	6.00 %	6.50 %	7.50 %

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

Major Competing Countries	Market Share
GERMANY WEST	28.00 %
GREECE	20.00 %
DENMARK	15.00 %

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

Products/services for which there are good market prospects:

1. FURS, APPAREL

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Import duties are high
- Lack of promotion and advertising

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: OSLO

Market: NORWAY

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

Activity: SALES TO NORWAY IMPORTS AS FOLLOW-UP TO FUR SHOW IN OSLO MAR
Expected Results: INCREASED SALES OF CDN FUR COATS

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

Activity: ASSIST 2 NORWEGIAN& 1 ICELANDIC BUY TO FUR SH IN MTL MAY/89
Expected Results: TOTAL SALES OF OVER \$1 MILLION

Activity: FUR BUYER TO HUDSONS BAY AUCTION, TORONTO FEB/90
Expected Results: SALES OF 20.7 MILLION

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

Activity: ATTEND FASHION WEEK, OSLO MAR/90
Expected Results: IDENTIFY NEW BUYERS FOR CDN FURS

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RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: OSLO

Country: NORWAY

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

	Total (\$ Million)	Canadian Share	Major Competitor Share
Current year	2330.00	0.60	80.00
One year ago	1114.00	1.80	73.00
Two years ago	1000.00	2.00	80.00

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

\$300 MILLION - WITH THE COMPLETION OF THE NORSK HYDRO PROJ AT BECANOUR, START UP OF ACTIVITIES RELATED TO HIBERNIA DEV & CONTINUED AQUACULTURE INTERESTS 1989, SHOULD PROVE TO BE A VERY INTERESTING YEAR FOR INVEST FROM NORWAY. HOWEVER, GENER WITH THE ECON SLOWDOWN, INTERN INVESTMENTS WILL SLOW DOWN.

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

- UNITED KINGDOM
- SWITZERLAND
- U.S.A.
- WEST INDIES (BERMUDA)
- BELGIUM
- SWEDEN

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

- SEMINARS, EITHER INDEPENDENTLY OR IN CONJUNCTION WITH THE EXPORT COUNCIL OF NORWAY, THAT ARE GENERAL IN NATURE OR TARGETED TO SPECIFIC SECTORS.
- TRADE AND INVESTMENT MISSIONS (BOTH TO NORWAY AS WELL AS MISSIONS TO COUNTRY).
- CORPORATE LIAISON CALLS.

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: OSLO

Country: NORWAY

Competitors' activities cont'd:

- ADVERTISING/DIRECT MAIL CAMPAIGNS.

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

- MORE APPEALING INDUSTRIAL ENVIRONMENT, CLOSENESS TO U.S.A.
- MORE APPEALING INDUSTRIAL ENVIRONMENT, CLOSENESS TO U.S.A.

the following constraints:

- LACK OF AWARENESS OF MARKET POTENTIAL

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

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

The mission believes that the following sectors are of greatest interest to investors in its territory/country with an assigned ranking of 1-10:

Sector	Ranking
Agriculture/Food/Fish	1
Resource Processing	2
Machinery and Equipment	3
Transportation	10
Consumer Products	6
Commercial Service	5
Computer and Communications	7
Health Care Products/Medical	9
Aerospace and Defence	8
Strategic Technologies	4

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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: OSLO

Country: NORWAY

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

Date

Type: SEMINAR, ABROAD

HIGHLIGHT CAN AFTER FREE TRADE AGREEMENT IN PLACE & ADVANTAGE RE ACCESS TO USA MARKET.

4/89

Location: OSLO

Invest Nature:

Sector: MULTIPLE SECTORS

Cooperants: EXPORT COUNCIL/ PROV. GOVTS.

Estimated Budget: \$5,000.00

Type: DIRECT MAIL CAMPAIGN

TO KEEP CONTACTS INFORMED OF CANADA AS AN INVESTMENT OPPURTUNITY.

0/00

Location:

Invest Nature:

Sector: MULTIPLE SECTORS

Cooperants:

Estimated Budget: \$500.00

Total estimated budget for all proposals:

\$5,500.00

Post : OSLO

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Post/Contact</u>
89/05/28	CANADA NORWAY OFFSHORE WORKING GROUP MISSION TO CDA MISSION IN, ACCESS	OIL & GAS EQUIPMENT, SERVICES H.SCHROETER/D.ADAMS
89/06/00	SOFTWARE BUYER (MIM) MISSION IN, TO FAIR	ADVANCED TECH. PROD. & SERV
89/08/00	AQUACULTURE/AQUANDR, OSLO, NORWAY INFO BOOTH, ONLY	FISHERIES, SEA PRODUCTS & SERV.
89/08/11	AQUA-NOR'89, TRONDHEIM, NORWAY INFO BOOTH, WITH GROUP	FISHERIES, SEA PRODUCTS & SERV. G.MCCALLUM/D.ADAMS
89/09/00	FUR SKIN BUYER (HUDSON BAY AUC TION) MISSION IN, TO FAIR	CONSUMER PRODUCTS
89/09/26	CANADA - USA NEW PRODUCTS CATALOGUE SHOW OSLO NORWAY OTHER PROMOTION	GENERAL OR UNASSIGNED ISB MCCALLUM/COTE
89/11/00	DO-IT-YOURSELF HOME IMPRO- VEMENT MISSION TO NORWAY MISSION OUT, INDUSTRY	FOREST PRODUCTS, EQUIP, SERVICES
90/02/00	SPORTING GOODS BUYER (SPORTING GOODS SHOW) MISSION IN, TO FAIR	CONSUMER PRODUCTS
90/02/00	BUYERS MISSION TO HARDWARE SHOW, TORONTO MISSION IN, TO FAIR	CONSUMER PRODUCTS

RPTBL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: STOCKHOLM

Country: SWEDEN

WAGE COSTS ROSE 8% IN 1988, WITH THE SAME FORECAST IN 1989, PUSHING INFLATION TO 6.7% IN 1988 (TWICE THE OECD AVERAGE), AND 7% IS EXPECTED FOR 1989. WAGE PRESSURES FLOW FROM A SERIOUS LABOUR SHORTAGE, WITH COMPANIES BIDDING FOR SCARCE RECRUITS WITH WAGE AND BENEFIT INCREASES. UNEMPLOYMENT IS DOWN TO 1.8% NATIONALLY, REPRESENTING REGIONAL AND STRUCTURAL UNEMPLOYMENT. DOMESTIC DEMAND PROVIDES THE IMPETUS FOR THIS STRONG ECONOMIC GROWTH, WITH DEMAND UP 3.4% LAST YEAR, AND 2.5% IN 1989. WITH INDUSTRY OPERATING AT CAPACITY, THE EXCESS OF DEMAND OVER GNP GROWTH WILL BE MET BY INCREASED IMPORTS. THIS IS NOT EXPECTED TO AFFECT THE TRADE BALANCE OF TRADE, AS SHARP PRICE RISES FOR SUCH MAJOR SWEDISH EXPORTS AS SPECIALTY STEEL, AND PULP AND PAPER WILL COMPENSATE. BUSINESS CONFIDENCE WAS BOLSTERED BY THE RETURN OF THE SOCIAL DEMOCRATS TO POWER IN THE SEPTEMBER 1988 ELECTIONS, CONTINUING THEIR MANAGEMENT OF SWEDEN FOR 50 OF THE PAST 56 YEARS. SWEDEN CAN CONTINUE TO ENJOY THE BENEFITS OF A PATERNALISTIC WELFARE SYSTEM COMBINED WITH A VIGOROUS INTERNATIONAL-MINDED CAPITALISM IN THE BUSINESS COMMUNITY. THE NEW GOVERNMENT'S PROGRAMS APPEAR TO CONTINUE THE ECONOMIC REVIVAL OF THE 1980'S, THROUGH INDUSTRIAL AND LABOUR ADJUSTMENT, AND AN ENTREPRENEURIAL VERSION OF MARKET SOCIALISM. MORE DEREGULATION APPEARS LIKELY, TO PREPARE SWEDEN FOR THE EUROPEAN COMMUNITY'S MOVE TO THE 1992 INTERNAL MARKET. SWEDISH BUSINESS SUPPORTS THE FOUR FREEDOMS, OF TRADE, SERVICES, MANPOWER, AND CAPITAL. THIS LATTER SECTOR IS IN PROCESS OF DEREGULATION, WITH LIFTING OF MOST RESTRICTIONS ON OVERSEAS PORTFOLIO INVESTMENT IN JANUARY 1989. TAX CUTS, ALONG WITH FINANCIAL DEREGULATION, MAY ENABLE POOLS OF SWEDISH CAPITAL, FORMERLY CONTAINED BY SEVERE RESTRICTIONS ON INVESTMENT OUTSIDE SWEDEN, TO DEVELOP INTERNATIONAL ACTIVITIES ANALOGOUS TO THE INDUSTRIAL OPERATIONS OF THE LARGER SWEDISH MULTINATIONAL FIRMS.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 EXPORT PROMOTION PRIORITIES

Mission: STOCKHOLM

Country: SWEDEN

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

1. ADVANCED TECH. PROD. & SERV
WELL DEVELOPED DATA COMMUNICATIONS NETWORK, INCL ELECTRONIC MAIL.
LARGEST INSTALLED BASE OF CELLULAR PHONES AND COMPUTER TERMINALS IN
REGION. ESA GROUND STATION OPERATOR.
2. ELECTRONICS EQUIP. & SERV
LEADER IN ROBOTICS AND INDUSTRIAL AUTOMATION. LEADER IN PER CAPITA
INSTALLATION OF COMPUTER TERMINALS. WORLDWIDE MARKET THROUGH SWEDISH
MULTINATIONALS.
3. DEFENCE PROGRAMS, PRODUCTS, SERV
CONTINUING PENETRATION OF TERRITORIAL WATERS BY SUBMARINES. MOU ON
DEFENCE COOPERATION FOR RESEARCH AND DEVELOPMENT.
4. CONSUMER PRODUCTS & SERVICES
HIGH DISPOSABLE INCOMES, COMBINED WITH PREFERENCE FOR NORTH AMERICAN
STYLES IN CONSUMER PRODUCTS. STRONG MARKET FOR SPORTS EQUIPMENT AND
ACTIVE SPORTSWEAR.

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

1. FISHERIES, SEA PRODUCTS & SERV.
2. TRANSPORT SYS, EQUIP, COMP, SERV.
3. FOREST PRODUCTS, EQUIP, SERVICES
4. MINE, METAL, MINERAL PROD & SRV

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: STOCKHOLM

Market: SWEDEN

Sector : FISHERIES, SEA PRODUCTS & SERV.

Sub-Sector: FISH & SHELLFISH & OTHER PROD

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	149.00 \$M	167.00 \$M	185.00 \$M	203.00 \$M
Canadian Exports	13.80 \$M	13.80 \$M	14.00 \$M	15.50 \$M
Canadian Share of Market	9.30 %	8.30 %	7.50 %	7.60 %

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

Major Competing Countries	Market Share
SWEDEN	45.00 %
DENMARK	18.00 %
NORWAY	15.00 %
NETHERLANDS	7.00 %
CANADA	5.00 %
UNITED STATES OF AMERICA	3.00 %

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

Products/services for which there are good market prospects:

1. PACIFIC SALMON FROZEN
2. EELS, GUTTED, FROZEN
3. FRESHWATER LAKE TROUT & WHITEFISH, FROZEN
4. COD FILLETS, FROZEN
5. FRESHWATER LAKE HERRING/CISCO ROE FROZEN
6. SCALLOPS, FROZEN
7. GREYSOLE FILLETS FROZEN
8. WHITEFISH ROE, FROZEN
9. HALIBUT, FROZEN

Factors contributing to current successful Canadian exports:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: STOCKHOLM

Market: SWEDEN

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

Activity: POST REPRESENTATIVE WILL ATTEND ANUGA89 IN COLOGNE
Expected Results: LOCATE SALES OPPORTUNITIES FOR CDN PRODUCTS

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

Activity: IDENTIFY SUPP: IQF LAYER/SHTRPK GREYSOLE FILLETS
Expected Results: INCREASED SALES

Activity: IDENTIFY SUPP OF COD FILLETS IN INSTL/RTL PACKS
Expected Results: INCREASED SALES

Activity: IDENTIFY CDN SUPP OF FRESHWATER ROE.
Expected Results: DOUBLE SALES VOLUME

Activity: SUPPORT LOCAL EEL IMPORTERS.
Expected Results: NO INTERRUPTION IN TRADITIONALLY GOOD CDN SALES TO THIS MKT & MARKET SHARES MAINTAINED

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: STOCKHOLM

Market: SWEDEN

Sector : FISHERIES, SEA PRODUCTS & SERV.

Sub-Sector: PROCESSED FISH & SHELLFISH

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	254.00 \$M	297.00 \$M	330.00 \$M	360.00 \$M
Canadian Exports	11.80 \$M	18.50 \$M	19.50 \$M	21.50 \$M
Canadian Share of Market	4.60 %	6.20 %	5.90 %	5.80 %

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

Major Competing Countries	Market Share
NORWAY	29.00 %
SWEDEN	25.00 %
DENMARK	15.00 %
GREENLAND	8.00 %
CANADA	6.00 %
UNITED STATES OF AMERICA	5.00 %

Products/services for which there are good market prospects:

1. SHRIMP IQF COOKED, SHELL-ON
2. FISH ROE-COD, LUMBFISH CURED
3. FRESHWATER CRAYFISH-COOKED
4. SHRIMP-IQF COOKED, SHELL OFF
5. LOBSTER-FROZEN COOKED
6. CRABMEAT COOKED FROZEN
7. HERRING BARRELLED CURED

Factors contributing to current successful Canadian exports:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: STOCKHOLM

Market: SWEDEN

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

Activity: IDENTIFY CDN FIRMS TO SUPPLY FROZ, COOK FRESHWATER CRAYFISH
Expected Results: ESTABLISH CDN CAPABILITY TO SUPPLY MULTIMILLION DOLLAR MARKET OPPORTUNITY

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

Activity: POST REP. TO ATTEND ANUGA 89 IN COLOGNE.
Expected Results: INCREASED SALES

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

Activity: IDENTIFY MKT NICHE FOR SMOKED SALMON IN HANDICRAFT PACKS.
Expected Results: LOCATE SALES OPPORTUNITIES FOR CDN PRODUCTS

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: STOCKHOLM

Market: SWEDEN

Sector : GRAINS AND OILSEEDS

Sub-Sector: CEREAL GRAINS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	17.00 \$M	26.00 \$M	24.00 \$M	26.00 \$M
Canadian Exports	4.70 \$M	12.40 \$M	9.50 \$M	12.60 \$M
Canadian Share of Market	24.00 %	47.00 %	39.00 %	48.00 %

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

Major Competing Countries

Market Share

SWEDEN	80.00 %
CANADA	10.00 %
GERMANY WEST	3.00 %
FINLAND	2.00 %
DENMARK	1.00 %
UNITED STATES OF AMERICA	1.00 %

Current Status of Canadian

exports in this sector/subsector: Well established and growing

Products/services for which there are good market prospects:

1. WHEAT GRAINS
2. DURUM GRAINS
3. WHEAT GLUTEN

Factors contributing to current successful Canadian exports:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: STOCKHOLM

Market: SWEDEN

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

Activity: REINFORCE REPUTION OF CDN DURUM
Expected Results: MAINTAIN BUYER KNOWLEDGE OF CDN DURUM SPECS & COMPETITIVENES

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

Activity: ENCOURAGE INVITE TO CIGI COURSESTO KEY LOCAL INDUSTRY PERSON
Expected Results: INCREASED AWARENESS OF OUTSTANDING QUALITY OF CDN GRAINS LEADING TO INCREASED LOCAL PURCHASES.

Activity: MONITOR QUALITY DECLINE TREND IN LOCAL WHEAT
Expected Results: INCRAESED SALES OPPORTUNITIES FOR HIGH QUALITY CDN GRAINS

Activity: OPRTNTY: TRAD. EUROP. SUPP. OF WHEAT GLUTEN CEASING PROD.
Expected Results: CAPTURE MKT SHARES BY REPLACING PREVIOUS MAJOR FOREIGN SUPP

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: STOCKHOLM

Market: SWEDEN

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	236.00 \$M	290.00 \$M	310.00 \$M	310.00 \$M
Canadian Exports	2.50 \$M	3.00 \$M	3.00 \$M	3.00 \$M
Canadian Share of Market	1.00 %	1.00 %	1.00 %	1.00 %

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

Major Competing Countries Market Share

SWEDEN	85.00 %
UNITED STATES OF AMERICA	8.00 %
UNITED KINGDOM	3.00 %
GERMANY WEST	2.00 %
NORWAY	1.00 %

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

Products/services for which there are good market prospects:

1. ASW EQUIPMENT
2. NBCW EQUIPMENT
3. ELECTRONIC EQUIPMENT

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Fairs and Missions support
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- Bilateral economic trade agreement

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: STOCKHOLM

Market: SWEDEN

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

Activity: CONT TO WORK THROUGH DEFENCE RDP COMMITTEE
Expected Results: IDENTIFICATION OF NEW SALES OPPORTUNITIES

Activity: SUPPORT MFRS OF ASW EQUIPMENT IN PROCUREMENT PROCESSES.
Expected Results: INCREASED SALES.

Activity: SUPPORT MFRS OF ELECT. EQUIP IN MKT DEVELOPMENT.
Expected Results: INCREASED MARKET EXPOSURE

Activity: SUPPORT MFG OF BCW EQUIP IN MKT IDENTIFICATION
Expected Results: INCREASED SALES

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

Activity: INVITE HEAD OF SWED DFCE PRCRMT TO CDA FOR OFF. & IND. VSTS.
Expected Results: IMPROVED
PROFILE FOR CDN PRODUCTION CAPABILITIES

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: STOCKHOLM

Market: SWEDEN

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

BCW SYMPOSIUM IN UMEA, JUN
1989

Approximate Value: 0 M\$
Financing Source :
Contact : CDN EMBASSY STOCKHOLM

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: STOCKHOLM

Market: SWEDEN

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: TELECOM, DATACOM, SAT, SPACECOM

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	630.00 \$M	670.00 \$M	700.00 \$M	750.00 \$M
Canadian Exports	7.00 \$M	7.50 \$M	10.00 \$M	15.00 \$M
Canadian Share of Market	1.10 %	1.20 %	1.50 %	2.00 %

Major Competing Countries

Market Share

SWEDEN	60.00 %
JAPAN	9.00 %
FINLAND	0.00 %
UNITED STATES OF AMERICA	5.00 %
UNITED KINGDOM	5.00 %
DENMARK	5.00 %

Current Status of Canadian

exports in this sector/subsector: Well established and growing

Products/services for which there are good market prospects:

1. DIGITAL RADIOLINK EQUIPMENT
2. CELLULAR RADIO
3. DATA COM PRODUCTS
4. PABS EQUIPMENT

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: STOCKHOLM

Market: SWEDEN

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

Activity: REPORT ON CELLULAR RADIO MKT IN SWEDEN
Expected Results: BETTER SOURCING OF NICHE PRODUCTS

Activity: GENERAL MKT SURVEY ON TELECOMMUNICATIONS
Expected Results: BETTER SOURCING OF NICHE PRODUCTS

Activity: REPORT ON ONGOING LIBERALISA'N OF TELECOM SERV & NEW MARKET.
Expected Results: BETTER SOURCING OF NICHE PRODUCTS

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: STOCKHOLM

Market: SWEDEN

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: BROADCASTING, INC. CABLE TV

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	348.00 \$M	360.00 \$M	380.00 \$M	400.00 \$M
Canadian Exports	7.10 \$M	7.60 \$M	8.50 \$M	9.00 \$M
Canadian Share of Market	2.00 %	2.10 %	2.30 %	2.25 %

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

Major Competing Countries Market Share

JAPAN	20.00 %
GERMANY WEST	20.00 %
UNITED STATES OF AMERICA	20.00 %
UNITED KINGDOM	15.00 %
FRANCE	10.00 %

Products/services for which there are good market prospects:

1. TV & VIDEO RECORDING EQUIPMENT
2. CABLE TV PRODUCTS
3. SOUND RECORDING EQUIPMENT

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Unsuitable product

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: STOCKHOLM

Market: SWEDEN

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

Activity: PREPARE SHORT REPORT ON MAJOR CABLE TV OPERATORS IN SWEDEN
Expected Results: BETTER TARGETING OF BUYER CONTACTS FOR CDN SUPPLIES

Activity: VISIT BY 2-3 MAJOR SWD. CATV OPERATORS TO CANADA
Expected Results: CLOSER COOP. WITH CDN OPERATORS & EQUIPMENT MFRS.

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

Activity: TRADE MISSION TO SWEDEN & SEMINAR CATV OPER & EQUIP MFG.
Expected Results: INCREASED AWARENESS OF CDN CAPABILITY, NEW BUYING CONNECTION
GOOD MKT PROSPECTS.

Activity: CDN BOOTH AT SATELLITE 89, STOCKHOLM

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: STOCKHOLM

Market: SWEDEN

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: COMPUTERS HARD/SOFTWARE & COMP

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1800.00 \$M	2000.00 \$M	2200.00 \$M	2500.00 \$M
Canadian Exports	13.30 \$M	12.40 \$M	13.00 \$M	13.50 \$M
Canadian Share of Market	0.75 %	0.60 %	0.80 %	0.80 %

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

Major Competing Countries	Market Share
SWEDEN	30.00 %
UNITED STATES OF AMERICA	30.00 %
JAPAN	15.00 %
UNITED KINGDOM	15.00 %

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

Products/services for which there are good market prospects:

1. PC SOFTWARE
2. MAINFRAME SOFTWARE
3. COM. SOFTWARE & PERIPHERALS
4. LIBRARY & FINANCIAL SYSTEMS
5. UNIX SOFTWARE
6. SOFTWARE CONSULTING SERVICES

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: STOCKHOLM

Market: SWEDEN

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

Activity: CONT DEVEL OF AGENCY CONTACTS THROUGH CORP VISITS
Expected Results: 10-15 NEW AGENTS OVER THE YEAR.

Activity: PREPARE OVERVIEW OF SWED. COMPUTER & SOFTWARE MARKET
Expected Results: BETTER TARGETING OF CDN PRODUCTS POTENTIAL

Activity: IDENTIFY BUYEERS & AGENTS VISITING MAJOR U.S. COMP. SHOWS.
Expected Results: GENERAL PROMOTION OF CDN CAPACITY WITH THE CDN PRESENCE AT US SHOWS

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

Activity: ATTEND CEBIT HANDOVER
Expected Results: INCREASED BUYING CONNECTIONS; GREATER MARKET EXPOSURE.

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

Activity: PROMOTE CDN PARTICIPATION IN MAJOR EUROPEAN COMP. SHOWS.
Expected Results: BETTER AWARENESS OF CDN CAPACITY

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: STOCKHOLM

Market: SWEDEN

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: REMOTE SENSING INC. SPACE SAT

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	60.00 \$M	65.00 \$M	70.00 \$M	75.00 \$M
Canadian Exports	3.00 \$M	3.00 \$M	3.50 \$M	4.00 \$M
Canadian Share of Market	5.00 %	5.00 %	5.00 %	5.30 %

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

Major Competing Countries	Market Share
SWEDEN	50.00 %
FRANCE	15.00 %
UNITED STATES OF AMERICA	10.00 %
GERMANY WEST	10.00 %

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

Products/services for which there are good market prospects:

1. IMAGING EQUIPMENT
2. IMAGING SOFTWARE
3. EARTH RECEIVING STATIONS

Factors contributing to current successful Canadian exports:

- Strong sectoral capability in Canada
- Competitive Canadian financing

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored
- DEFENCE CONTROL OF
- AIR. PHOTOM. ACTVTS.

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: STOCKHOLM

Market: SWEDEN

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

Activity: NORDIC REMOTE SENSING SEMINARS PROM CDN R&D & TECH ASPECTS
Expected Results: BETTER AWARENESS IN THE R.S. COMMUNITY OF CDN CAPABILITY
IN THIS SECTOR-& TO PROMOTE R.S. WORLD CONF IN CDN SUMMER89

Activity: REPORT ON R.S. ACTIVITIES IN THE PRIVATE SECTOR.
Expected Results: BETTER TARGETING OF BUYERS FOR NICHE PROD & TECHNOLOGY

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: STOCKHOLM

Market: SWEDEN

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: OTHER ELECTRONICS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	780.00 \$M	800.00 \$M	820.00 \$M	850.00 \$M
Canadian Exports	5.00 \$M	7.00 \$M	7.00 \$M	7.00 \$M
Canadian Share of Market	1.00 %	1.00 %	1.00 %	1.00 %

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

Major Competing Countries	Market Share
SWEDEN	25.00 %
JAPAN	20.00 %
UNITED STATES OF AMERICA	20.00 %
GERMANY WEST	10.00 %

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

Products/services for which there are good market prospects:

1. SEMI CONDUCTORS
2. PRINTED CIRCUIT BOARDS
3. CONNECTORS

Factors contributing to current successful Canadian exports:

- Strong sectoral capability in Canada
- Competitive Canadian financing

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Lack of promotion and advertising
- Unsuitable product
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored
- CDN EXPORT CONTROL

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: STOCKHOLM

Market: SWEDEN

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

Activity: CONT PROM OF CDN FIRMS TO ERICSSON WHO HAVE INDICATED OFFSET
Expected Results: 3-5 NEW BUYING CONNECTIONS

Activity: CONT PROM OF CDN ELECT., COMP THROUGH CORPORATE VISITS

Activity: CONT SUPPORT & PROM OF NEW GENERATION OF LSDN CHIPS

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

Activity: JOURNALISTS FM ELECTRONIKVARLDEN TO BE INVITED TO CDA.
Expected Results: BETTER PRESS COVERAGE OF NEW PRODUCTS

Activity: PROM. CDN PRICPTN IN MAJDR EUROPE ELECT. COMPONENTS FAIR.
Expected Results: BETTER AWARENESS OF CDN CAPABILITY AMONG SWE OEMS & DISTRIBUTORS

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: STOCKHOLM

Market: SWEDEN

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: CONSULTING & OTHER SERVICES

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	100.00 \$M	100.00 \$M	110.00 \$M	115.00 \$M
Canadian Exports	1.00 \$M	1.00 \$M	2.00 \$M	3.00 \$M
Canadian Share of Market	1.00 %	1.00 %	2.00 %	3.00 %

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

Major Competing Countries	Market Share
SWEDEN	70.00 %
UNITED STATES OF AMERICA	5.00 %
FRANCE	5.00 %
GERMANY WEST	5.00 %
UNITED KINGDOM	5.00 %

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

Products/services for which there are good market prospects:

1. CONSULTING SERVICES

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Strong sectoral capability in Canada
- Competitive Canadian financing
- willingness of exporters to invest/joint venture in territory

Factors for Canadian exports not reaching market potential:

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

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: STOCKHOLM

Market: SWEDEN

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

Activity: COMPUTER JOURNALISTS MISSION TO CANADA
Expected Results: BETTER PRESS COVERAGE FOR CDN PRODUCTS

Activity: INDENTIFY CDN SOFTWARE HOUSE INTREST IN OPENING LOCAL OFFICE
Expected Results: LONG TERM SALES NOT POSSIBLE WITHOUT LOCAL PRESENCE.

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

Activity: TRADE MISSION & CDN BOOTH AT MAJOR COMPUTER FAIR OCT89
Expected Results: BETTER EXPOSURE OF CDN CAPABILITIES.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: STOCKHOLM

Market: SWEDEN

Sector : POWER & ENERGY EQUIP. & SERV.

Sub-Sector: SOLAR & OTHER PASSIVE SYSTEMS

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

Major Competing Countries

Market Share

GERMANY WEST
JAPAN

0.00 %
0.00 %

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

Products/services for which there are good market prospects:

1. ALTERNATE NERGY SYSTEMS & TECHNOLOGY
2. ELECTRICITY-EFFICIENT/REPLACING TECHNOLOGY

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector

Factors for Canadian exports not reaching market potential:

- Market prospects have not been adequately explored

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

Activity: PREPARATION OF REPORT ON EXPORT & TECHNOLOGY INFLOW OPPS.
Expected Results: DISSEMINATION OF MARKET OPPORTUNITY INFORMATION

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: STOCKHOLM

Market: SWEDEN

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

Activity: LIASION WITH NATIONAL ENERGY ADMINISTRATION
Expected Results: BETTER DEFINED OPPORTUNITIES

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

ENERGY & TECHNOLOGY FUND	Approximate Value:	80 M\$
	Financing Source :	OTHER
	Contact :	EMBASSY STOCKHOLM

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: STOCKHOLM

Market: SWEDEN

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: AUTOMOTIVE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	3800.00 \$M	4400.00 \$M	5000.00 \$M	5500.00 \$M
Canadian Exports	26.00 \$M	30.00 \$M	35.00 \$M	40.00 \$M
Canadian Share of Market	0.70 %	0.70 %	0.70 %	0.73 %

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

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

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

Products/services for which there are good market prospects:

1. VANS
2. OEM COMPONENTS
3. SNOWMOBILES
4. TRUCKS

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Restrictive standards
- Unsuitable product
- Market prospects have not been adequately explored

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: STOCKHOLM

Market: SWEDEN

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

Activity: CONT LIASON/SUPPORT RE SATISFYING SWEDISH STANDARDS
Expected Results: MAINTAIN/INCREASE
MARKET SHARE

Activity: INDENTFY NEW DISTR FOR COMPONENTS & ACCESSORIES
Expected Results: INCREASED SALES

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: STOCKHOLM

Market: SWEDEN

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: URBAN TRANSIT

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	45.00 \$M	45.00 \$M	50.00 \$M	55.00 \$M
Canadian Exports	0.50 \$M	0.50 \$M	0.50 \$M	0.50 \$M
Canadian Share of Market	1.00 %	1.00 %	1.00 %	1.00 %

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

Major Competing Countries	Market Share
GERMANY WEST	0.00 %

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

Products/services for which there are good market prospects:

1. VEHICLE CONTROL & IDENTIFICATION SYSTEMS
2. SPECIALIZED BUSES

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Provincial export promotion
- Strong sectoral capability in Canada

Factors for Canadian exports not reaching market potential:

- Market prospects have not been adequately explored

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: STOCKHOLM

Market: SWEDEN

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

Activity: FOLLOW UP ON VEHICLE CONTROL PILOT PROJECT
Expected Results: FURTHER SALES

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: STOCKHOLM

Market: SWEDEN

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: AERUSPACE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	752.00 \$M	500.00 \$M	550.00 \$M	550.00 \$M
Canadian Exports	4.40 \$M	3.00 \$M	3.00 \$M	3.00 \$M
Canadian Share of Market	0.59 %	0.80 %	0.60 %	0.60 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	57.00 %
UNITED KINGDOM	17.00 %
GERMANY WEST	17.00 %
FRANCE	7.00 %

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

Products/services for which there are good market prospects:

1. SIMULATORS
2. MICROWAVE LANDING SYSTEMS
3. TESTING EQUIPMENT

Factors contributing to current successful Canadian exports:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: STOCKHOLM

Market: SWEDEN

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

Activity: SUPPORT CDN MFR IN TENDER PROCESS FOR MICROWAVE LAND SYSTEM
Expected Results: COMPANY INVITED TO TENDER

Activity: IDENTIFY DISTR FOR NON-DESTRUCTIVE TESTING EQUIPMENT
Expected Results: LONG RUN SALES

Activity: CONT SUPPORT TO CDN SIMULATOR MANUFACTURERS
Expected Results: FOLLOW-ON SALES

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

Activity: PROMOTION OF AIRSHOW CANADA 1989
Expected Results: INCREASED SWEDISH ATTENDANCE

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: STOCKHOLM

Market: SWEDEN

Sector : FOREST PRODUCTS,EQUIP,SERVICES

Sub-Sector: WOOD AND WOOD PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	734.00 \$M	951.00 \$M	1032.00 \$M	1100.00 \$M
Canadian Exports	5.90 \$M	11.10 \$M	12.00 \$M	14.00 \$M
Canadian Share of Market	0.80 %	1.20 %	1.20 %	1.30 %

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

Major Competing Countries	Market Share
SWEDEN	70.00 %
FINLAND	6.00 %
GERMANY WEST	5.00 %
DENMARK	3.00 %
POLAND	2.00 %
UNION OF SOVIET SOC REP	2.00 %

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

Products/services for which there are good market prospects:

1. HARDWOOD,PULPWOOD/CHIPS
2. OAK,VENEER
3. OAK,SAWN
4. HARDWOOD,VENEER
5. FIBREBOARD
6. PLYWOOD SOFTWOOD CONSTRUCTION
7. ASH,SAWN
8. MAPLE,SAWN
9. WALNUT,SAWN
10. HEMLOCK,SAWN
11. OAK PARQUET FLOORING

Factors contributing to current successful Canadian exports:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: STOCKHOLM

Market: SWEDEN

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

Activity: JOINT LOCAL CDN RSRCH IN PWN; ONGOING CONTACT W. PLNT PRCTN.
Expected Results: REVIEW OF IMPORT BAN IN SOFTWOOD PULPWOOD/CHIPS WITH RESTORED MARKET ACCESS.

Activity: ONGOING CONTACT WITH LOCAL BUYERS RE HRDWD/PULPWOOD & CHIPS.
Expected Results: ESTABLISH MARKET OPPORTUNITIES

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

Activity: IDENTIFY SOURCES OF SAWN HEMLOCK.
Expected Results: NEW BUYING CONNECTIONS

Activity: IDENTIFY REGULAR SUPP OF FIBREBOARD
Expected Results: INCREASED SALES

Activity: IDENTIFY SUPP OF DAK PARQUET FLOORING
Expected Results: INCREASED SALES

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: STOCKHOLM

Market: SWEDEN

Sector : CONSUMER PRODUCTS & SERVICES

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

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	38925.00 \$M	51060.00 \$M	60000.00 \$M	65000.00 \$M
Canadian Exports	2141.00 \$M	2830.00 \$M	3500.00 \$M	4250.00 \$M
Canadian Share of Market	5.50 %	5.50 %	5.80 %	6.50 %

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

Major Competing Countries Market Share

GREECE	25.80 %
DENMARK	20.00 %
KOREA	12.00 %
GERMANY WEST	10.30 %
HONG KONG	7.80 %
CANADA	5.50 %

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

Products/services for which there are good market prospects:

1. FOX
2. MINK
3. RACCOON
4. COYOTE
5. BEAVER
6. MUSCRAT

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Import duties are moderate
- Fairs and Missions support
- Trade Fair activity
- Strong sectoral capability in Canada

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: STOCKHOLM

Market: SWEDEN

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

Activity: OBTAIN INFO ON CDN PARTICIPATION IN FRANKFURT FAIR, W GERMANY
Expected Results: BUYING CONNECTIONS

Activity: ENCOURAGE SWED BUYERS TO ATTEND MTL. & FRANKFURT SHOWS.
Expected Results: INCREASED PURCHASES

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

Activity: INVITE 1-2 SWED BUYERS TO MTL FOR FAIR, MAY 89-90
Expected Results: INCREASED PURCHASES

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

Activity: ENCOURAGE CDN FURRIER VISIT SWED DISPLAY AT POST OCT/NOV89
Expected Results: INCREASED PURCHASES.

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: STOCKHOLM

Market: SWEDEN

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: JEWELRY & GIFTWARE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	5779.00 \$M	5129.00 \$M	6250.00 \$M	6750.00 \$M
Canadian Exports	890.00 \$M	1287.00 \$M	1750.00 \$M	2250.00 \$M
Canadian Share of Market	15.40 %	25.10 %	28.00 %	33.30 %

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

Major Competing Countries	Market Share
CZECHOSLOVAKIA	45.60 %
CANADA	25.10 %
TAIWAN	17.40 %
ITALY	601.00 %
SWITZERLAND	2.50 %
POLAND	1.30 %

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

Products/services for which there are good market prospects:

1. ICE HOCKEY SKATES
2. PROTECTIVE EQUIPMENT
3. BASEBALL
4. VOLLEY BALL
5. AMERICAN FOOTBALL EQUIPMENT

Factors contributing to current successful Canadian exports:

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

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: STOCKHOLM

Market: SWEDEN

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

Activity: IDENTIFY CDN SUPP OF FTBALL, VOLLEY BALL BASEBALL EQUIP MORE
Expected Results: ADDITIONAL BUYING CONNECTIONS

Activity: OBTAIN INFIRM ON LOCAL MKT CONDITIONS IN ABOVE SUB-SECTORS
Expected Results: INCREASED SALES VOLUMES

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

Activity: PARTICIPATE IN ISPO SPORT GOODS FAIR (MUNICH) CDN STAND, FEB 89-
Expected Results: INCREASE NUMBER OF SWEDISH AGENTS

Activity: INVITE SWED BUYERS TO CSGA SHOW, FEB 89/90
Expected Results: PURCHASES/REPRESENTATION.

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

Activity: CONTACT SWED BUYING GROUPS, COOP, TO INFORM ON AVAILABILITY
Expected Results: PURCHASES, INCREASED MARKET SHARE

Activity: ENCOURAGE CDN & SWED FIRMS TO EXHIBIT PRODUCTS AT DOMESTIC
Expected Results: PURCHASES, INCREASED MARKET SHARE.

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: STOCKHOLM

Market: SWEDEN

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: CULTURE INDUSTRIES

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	4091.00 \$M	4225.00 \$M	4550.00 \$M	4790.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	250.00 \$M	350.00 \$M
Canadian Share of Market	0.00 %	0.00 %	5.50 %	7.30 %

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

Major Competing Countries	Market Share
UNITED KINGDOM	41.60 %
UNITED STATES OF AMERICA	17.60 %
ITALY	12.50 %
FRANCE	7.30 %
DENMARK	7.10 %
GERMANY WEST	7.00 %

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

Products/services for which there are good market prospects:

1. TV DOCUMENTARY
2. EDUCATIONAL
3. VIDEO

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Import duties are moderate
- Aggressive marketing
- PEMD support

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: STOCKHOLM

Market: SWEDEN

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

Activity: FOLLOW UP ON CDN PRIZE-WINNING FILM SHOWN LOCALLY

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

Activity: IDENTIFY CDN FILM PROCRS, ENCOURAGE THEM TO VISIT MKT
Expected Results: INCREASED PURCHASES

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: STOCKHOLM

Country: SWEDEN

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

- ACCESS TO U.S. MARKET
- FAMILIAR CULTURE/LIFESTYLE

the following constraints:

- DISTANCE TO U.S. MARKET AREAS
- LACK OF NATIONAL DATABASE ON INVESTMENT PROGRAMS

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

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

The mission believes that the following sectors are of greatest interest to investors in its territory/country with an assigned ranking of 1-10:

Sector	Ranking
Agriculture/Food/Fish	8
Resource Processing	4
Machinery and Equipment	1
Transportation	3
Consumer Products	7
Commercial Service	10
Computer and Communications	9
Health Care Products/Medical	5
Aerospace and Defence	6
Strategic Technologies	2

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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: STOCKHOLM

Country: SWEDEN

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

	Date
Type: COMMUNICATIONS EXHIBIT	
CANADA WEEK	0/00
Location: JONKOPING	
Invest Nature: ALL	
Sector: MULTIPLE SECTORS	
Cooperants: CDN PROVINCES & SWEDISH TRADE COUNCIL	
Estimated Budget: \$4,000.00	
INFO BOOTH CAD/CAM CONFERENCE	5/89
Location: GOTHENBURG	
Invest Nature: ACQUISITION	
JOINT VENTURE	
TECHN LICENSING	
Sector: GRAINS AND OILSEEDS	
Cooperants: CDN PROVINCES	
Estimated Budget: \$3,000.00	
INFO BOOTH INTERNATIONAL CHEMISTRY CONGRESS	8/89
Location: STOCKHOLM	
Invest Nature: JOINT VENTURE	
STRATEGIC PARTN	
TECHN LICENSING	
Sector: FISHERIES, SEA PRODUCTS & SERV.	
Cooperants: CDN PROVINCES	
Estimated Budget: \$3,000.00	
Type: OUTCALL PROGRAM	
INDUSTRY LIAISON BY AMBASSADOR & C. COUNSELLOR	0/00
Location:	
Invest Nature: ALL	
Sector: MULTIPLE SECTORS	
Cooperants: CDN PROVINCES	
Estimated Budget: \$4,000.00	

Total estimated budget for all proposals: \$14,000.00

Post : STOCKHOLM

Start Date Event Name, Location & Type Sector/Post/Contact

89/10/19 INT'L TECHNICAL TRADE FAIR, GENERAL OR UNASSIGNED ISB
STOCKHOLM, SWEDEN
INFO BOOTH, ONLY

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: HAGUE, THE

Country: NETHERLANDS

DURING 1988, THE DUTCH ECONOMY FURTHERED THE MODEST RECOVERY WHICH BEGAN IN 1983. THE PRESENT GOVERNMENT WAS ELECTED ON AND HAS ADHERED TO A PROGRAM OF AUSTERITY AIMED AT REDUCING GOVERNMENT SPENDING, STIMULATING THE PRIVATE SECTOR AND CREATING JOBS. THESE POLICIES HAVE PERMITTED THE ECONOMY TO GROW BY OVER 2% OVER THE PAST YEAR, AND GROWTH IN 1989 COULD BE AS HIGH AS 3%. INFLATION IS NEAR ZERO, WHILE UNEMPLOYMENT, CONSISTENTLY HIGH OVER RECENT YEARS HAS DECLINED MARGINALLY TO ABOUT 12%. THIS ECONOMIC GROWTH, WHILE REMAINING LOW, WAS MUCH HIGHER THAN FORECAST, ALTHOUGH CRONIC UNEMPLOYMENT CONTINUES TO BE A PROBLEM. AIDED BY WAGE RESTRAINT INDUSTRIAL INVESTMENT HAS MADE A REMARKABLE RECOVERY, INCREASING BY 12% WITH A FURTHER 4% IN 1987 AND 5% IN 1988. EXPECTED GROWTH IN INDUSTRIAL PRODUCTION HAS EXCEEDED THE EUROPEAN AVERAGE BY NEARLY 0% SINCE 1980. THE INTERNATIONAL SECTOR CONTINUES TO BE THE KEY COMPONENT OF THE DUTCH ECONOMY WITH ALMOST 60% OF THE GNP BEING TRADE RELATED. OVER 70% OF DUTCH EXPORTS GO TO OTHER EC COUNTRIES (30% TO GERMANY ALONE) WHILE THE USA AND JAPAN ACCOUNT FOR MUCH OF THE REST. DESPITE A STRONG AND RISING GUILDER, DUTCH EXPORTS REMAIN STRONG AND THE TRADE BALANCE HAS REGISTERED A SURPLUS OF 2-3% OF GNP. THE CURRENT ACCOUNT SURPLUS OF DFL. 7.5 BILLION IS EXPECTED TO INCREASE TO DFL. 9 BILLION IN 1988. IMPORT GROWTH, PRIMED IN PART BY A FAVOURABLE EXCHANGE RATE IS EXPECTED TO REMAIN IN THE 3-4% RANGE. KEY SUPPLIERS ARE EEC PARTNERS, THE USA AND JAPAN AND THE MAIN IMPORTS ARE CRUDE OIL, FOODSTUFFS, CHEMICALS, TRANSPORT EQUIPMENT AND OTHER MACHINERY AND A BROAD RANGE OF CONSUMER GOODS. THE NETHERLANDS REMAINS ONE OF CANADA'S MOST IMPORTANT MARKETS. SALES TO THE NETHERLANDS ROSE TO CANADIAN DOLLARS 970 MILLION IN 1986 AND EXCEEDED CANADIAN \$ 1 BILLION IN 1987. THIS TREND IS CONTINUING. THE SIGNIFICANT DECLINE OF THE CANADIAN DOLLAR AGAINST THE GUILDER OVER THE PAST 3 YEARS HAS MADE CANADIAN GOODS MUCH MORE COMPETITIVE, HENCE EXPANDING THE BREADTH AND DEPTH OF OPPORTUNITIES. THIS HAS CAUSED A REMARKABLE INCREASE IN DUTCH ENQUIRIES FOR CANADIAN GOODS AND THERE ARE EXCELLENT AND IMPROVING PROSPECTS FOR THE SALE OF CANADIAN INFORMATICS, COMMUNICATIONS, DEFENCE AND ELECTRONICS EQUIPMENT, SOFTWARE, ENVIRONMENTAL EQUIPMENT AND TECHNOLOGY, FOODSTUFFS, FISH (INCLUDING DIFFERENT SPECIES), AUTOMATION AND PROCESS CONTROL, FOREST PRODUCTS, SPORTING GOODS ETC.

MOREOVER, THE STRONG GUILDER COMBINED WITH CANADA'S FAVOURABLE INVESTMENT CLIMATE AND THE PROSPECTS FOR CANADA-U.S. FREE TRADE, HAVE MADE CANADA AN INCREASINGLY ATTRACTIVE DESTINATION FOR DUTCH INVESTMENT AS DEMONSTRATED BY THE NUMBER OF ENQUIRIES. FURTHER DUTCH TOURISM TO CANADA ROSE BY 17% IN 1987 AND HAVE REACHED 14% IN 1988. THE NETHERLANDS CONTINUES TO BE AN EXCELLENT SOURCE FOR NEW TECHNOLOGIES. IN SUM, AN IMPROVING DUTCH ECONOMY AND THE INHERENT STRENGTHS OF THE NETHERLANDS COMBINED WITH FAVOURABLE EXCHANGE RATES SHOULD ALLOW THE NETHERLANDS TO CONTINUE, INDEED, IMPROVE, AS AN EXCELLENT ECONOMIC PARTNER FOR CANADA.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 EXPORT PROMOTION PRIORITIES

Mission: HAGUE, THE

Country: NETHERLANDS

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

1. ADVANCED TECH. PROD. & SERV
PERIPHERAL EQUIPMENT MARKET OF TELEPHONE SYSTEM WILL BE LIBERALIZED JAN 1, 1989 - INFORMATICS SECTOR GROWING AT 20% ANNUALLY & DUTCH ARE MORE RECEPTIVE TO ENGLISH LANGUAGE DOCUMENTATION THAN MANY CONTINENTAL EUROPEANS.
2. DEFENCE PROGRAMS, PRODUCTS, SERV
LARGE PROPORTION OF DUTCH MOD REQUIREMENTS ARE IMPORTED. DEFENCE SPENDING IS GROWING AT 2% ANNUALLY. PROCUREMENT OFFICIALS ARE OPEN TO NEW ADVANCED TECHNOLOGY. ARMED SERVICES OF BOTH COUNTRIES EXCHANGE INFO FREELY & RESPECT EACH OTHERS RECOMMENDATIONS.
3. FOREST PRODUCTS, EQUIP, SERVICES
TIMBER FRAME CONSTRUCTION HAS GAINED LIMITED ACCEPTANCE IN NETHERLANDS THERE IS POTENTIAL FOR GREATER MARKET SHARE. SPF ALSO USED IN RENOVATION WORK. PLYWOOD USE EXPANDING. WESTERN RED CEDAR GROWING IN POPULARITY.
4. AGRI & FOOD PRODUCTS & SERVICE
POTENTIAL FOR AGRICULTURAL PRODUCTS NOT GOVERNED BY EC LEVY SYSTEMS HAS INCREASE SIGNIFICANTLY DUE TO COMPETITIVE VALUE OF DOLLAR. PROSPECTS FOR CERTAIN SPECIALTY FOODS HAVE IMPROVED DUE TO COMPETITIVE CANADIAN PRICES.

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

1. MINE, METAL, MINERAL PROD & SRV
2. CHEM PROD & PETROCHEM, EQP, SERV
3. FOREST PRODUCTS, EQUIP, SERVICES
4. AGRI & FOOD PRODUCTS & SERVICE

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: HAGUE, THE

Market: NETHERLANDS

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	15909.00 \$M	18628.00 \$M	17575.00 \$M	18437.00 \$M
Canadian Exports	72.00 \$M	90.00 \$M	140.00 \$M	173.00 \$M
Canadian Share of Market	0.45 %	0.48 %	0.80 %	0.94 %

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

Major Competing Countries	Market Share
BELGIUM	18.00 %
GERMANY WEST	16.00 %
FRANCE	9.00 %
UNITED KINGDOM	6.00 %
UNITED STATES OF AMERICA	4.00 %

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

Products/services for which there are good market prospects:

1. DRY PULSES (HUMAN CONSUMPTION AND FEED)
2. SOYABEANS (FOOD GRADE)
3. FROZEN & CANNED CORN
4. HORSEMEAT, MEAT OFFALS & SPECIALTY BEEF
5. FROZEN BLUEBERRIES
6. SPECIALTY FOODS

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- PEMD support

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: HAGUE, THE

Market: NETHERLANDS

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Import duties are high
- Restrictive quotas
- Restrictive standards
- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system

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

Activity: SERVICES INCR FLOW OF ENQ FROM CDN SUPPLIER & LOCAL IMPORT
Expected Results: EXPANDING MARKET SHARE.

Activity: ENC DUTCH IMP/AG TO VISIT CDN STANDS AT MAJOR EUR FOOD SHOWS
Expected Results: INCREASING AWARENESS OF CANADIAN SUPPLY CAPABILITIES.

Activity: ESTABLISH DATABANK ACTUAL & POT. DUTCH AGENTS IMPORT.BUYERS
Expected Results: MORE COMPLETE INFORMATION ON IMPORTERS WILL LEAD TO INCREASED SALES.

Activity: ANALYSE ROLE OF WHOLESALE CENTRE CATERING TO THE HOTEL/REST
Expected Results: INCREASE EXPORTS IN HOTEL/RESTAURANT SECTOR.

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

Activity: INITIATE EXAM & EVALUTE OF IMPLIC OF EUROPE 1992 FOR CDN EXP
Expected Results: ADJUSTMENT OF MARKET STRATEGIES & TACTICS.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: HAGUE, THE

Market: NETHERLANDS

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1630.00 \$M	1720.00 \$M	1818.00 \$M	1910.00 \$M
Canadian Exports	49.00 \$M	30.00 \$M	32.00 \$M	35.00 \$M
Canadian Share of Market	3.00 %	1.70 %	1.70 %	1.80 %

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

Major Competing Countries	Market Share
NETHERLANDS	40.00 %
UNITED STATES OF AMERICA	25.00 %
GERMANY WEST	12.00 %
UNITED KINGDOM	10.00 %
ITALY	5.00 %

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

Products/services for which there are good market prospects:

1. RIFLES
2. SURVEILLANCE DRONES
3. SIMULATORS
4. NBC EQUIPMENT
5. ELECTRONIC WARFARE

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Competitive pricing
- Strong sectoral capability in Canada
- Bilateral economic trade agreement
- WILLINGNESS TO OFFER GOOD
- OFFSET PACKAGES TO DUTCH
- INDUSTRY

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: HAGUE, THE

Market: NETHERLANDS

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

Activity: SERVICE INCREASING FLOW OF ENQUIRIES FROM CDN SUPPLIERS
Expected Results: ALLOW DUTCH OFFICIALS TO EVALUATE NEW DEFENCE PRODUCTS & THUS INCREASE CDN MARKET SHARE

Activity: DEVELOP CLOSER CONTACTS WITH SR. MILITARY OFFICIALS
Expected Results: IMPROVED ACCESS FOR CDN BUSINESSMEN TO MORE SENIOR LEVELS THAN WAS PREVIOUSLY THE CASE

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

Activity: PREPARE RESEARCH DEV'T & PRODUCTION STEERING COMMITTEE
Expected Results: IMPROVED CONTACT WITH DUTCH MOD, IMPROVED FLOW OF INFO LEADING TO GREATER OPPORTUNITIES TO BID ON DUTCH REQUIREMENT

Activity: DEV. COMPUTER DATABASE TO TRACK MARKET PROSPECTS
Expected Results: TIMELY INFO/ADVICE TO CDN EXPORTERS WILL ENHANCE THEIR CHANCES FOR SUCCESS.

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: HAGUE, THE

Market: NETHERLANDS

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	7013.00 \$M	9422.00 \$M	11306.00 \$M	16306.00 \$M
Canadian Exports	53.13 \$M	61.16 \$M	73.37 \$M	13.05 \$M
Canadian Share of Market	0.76 %	0.65 %	0.65 %	0.80 %

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

Major Competing Countries

Market Share

GERMANY WEST	29.00 %
BELGIUM	13.00 %
UNITED STATES OF AMERICA	12.00 %
UNITED KINGDOM	8.00 %
FRANCE	7.00 %
JAPAN	6.00 %

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

Products/services for which there are good market prospects:

1. DATACOMM HARDWARE
2. PUBLIC DATACOM SWITCHES
3. PABX
4. PC LOCAL & WIDE AREA NETWORKS
5. COMPUTER PERIPHERALS
6. LAB INSTRUMENTS
7. ANALYTICAL INSTRUMENTS
8. COMPUTER SOFTWARE
9. PROCESS CONTROL INSTRUMENTATION

Factors contributing to current successful Canadian exports:

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

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: HAGUE, THE

Market: NETHERLANDS

Factors for Canadian exports not reaching market potential:

- Market prospects have not been adequately explored

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

Activity: FOLLOW UP ON INTEREST GENER BY INFO BOOTH IN EUROCOMM, 12/88
Expected Results: 5 NEW AGENCIES FOR CANADIAN MANUFACTURERS.

Activity: PREP/DIST REPORT ON NETH MKT FOR COMPUTER HARD/SOFTWARE
Expected Results: INTRODUCE 5 NEW FIRMS TO DUTCH MARKET.

Activity: ENLARGE ENB DIR OF NETHS TELECOM EQUIP IMP/AGENTS & VISIT CO
Expected Results: IDENTIFY NEW IMPORTERS/AGENTS INTERESTED IN CANADIAN PRODUCTS.

Activity: ENLARGE EMBASSY DIR OF NETHS COMPUTER HARD/SOFTWARE IMPORTER
Expected Results: REINFORCE IMAGE OF CANADA AS SOURCE FOR INNOVATIVE AND AND QUALITY PRODUCTS.

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

Activity: MATCHMAKER MISSION TO "HET INSTRUMENT" MAY 1990
Expected Results: AT LEAST 5 NEW AGENCIES FOR CANADIAN INSTRUMENTATION PRODUCTS.

Activity: INCOMING LAB. EQUIP AGENTS/DISTR MISSION FROM BENELUX
Expected Results: AT LEAST 5 NEW AGENCIES FOR CANADIAN INSTRUMENTATION PRODUCTS.

Activity: INFO BOOTH AT EUROCOMM 90 EXHIBITION
Expected Results: AT LEAST 5 NEW AGENCIES FOR CANADIAN DATACOM/TELECOM PRODUCTS.

Activity: REPORT ON NETHS MARKET FOR INSTRUMENTATION
Expected Results: INTRODUCE 5 NEW FIRMS TO DUTCH MARKET.

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: HAGUE, THE

Market: NETHERLANDS

Sector : FOREST PRODUCTS,EQUIP,SERVICES

Sub-Sector: WOOD AND WOOD PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1652.00 \$M	1925.00 \$M	1950.00 \$M	2145.00 \$M
Canadian Exports	45.00 \$M	27.00 \$M	33.00 \$M	43.00 \$M
Canadian Share of Market	2.72 %	1.40 %	1.70 %	2.00 %

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

Major Competing Countries

Market Share

BELGIUM	17.00 %
GERMANY WEST	16.00 %
FINLAND	8.00 %
SWEDEN	7.00 %
FRANCE	5.00 %
UNION OF SOVIET SOC REP	5.00 %

Current Status of Canadian

exports in this sector/subsector: Well established and growing

Products/services for which there are good market prospects:

1. CLS SPF & SIMILAR
2. PLYWOOD
3. WESTERN RED CEDAR
4. HEMLOCK
5. DIY & SEMI MANUFACTURED PRODUCTS
6. DOUGLAS FIR
7. HARDWOOD AND RELATED PRODUCTS

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- PEMD support
- Canada is one of few sources of supply
- Strong sectoral capability in Canada

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: HAGUE, THE

Market: NETHERLANDS

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Restrictive quotas
- Restrictive standards
- COMPETITION, TFC NOT FULLY
- ACCEPTED, US STRENGTH IN PLYWOOD

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

Activity: MONITOR DUTCH VIEWS ON PLANT HEALTH ISSUES & ARGUE CDN POSTN
Expected Results: CONTINUED UNRESTRICTED ACCESS TO EEC FOR CDN SOFTWOOD LUMBER

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

Activity: MARKET REPORT ON FOREST PRODUCTS MARKET
Expected Results: INTRODUCE 5 NEW EXPORTERS TO DUTCH MARKET

Activity: INCOMING FOREST-BASED DIY & BUILDING PRODUCTS BUYERS MISSION
Expected Results: INTRODUCE KEY BUYERS/IMPORTERS TO SELECTED CDN SUPPLIERS

Activity: LIAISE W/KEY LOCAL TRADE PUBLNS: ENCOURAGE COVERAGE OF CDA
Expected Results: ENHANCE CDA'S IMAGE AS ECOLOGICALLY RESPONSIBLE SUPPLIER OF FOREST PRODUCTS AND KNOW-HOW RE BUILDING SECTOR

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RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: HAGUE, THE

Country: NETHERLANDS

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

	Total (\$ Million)	Canadian Share	Major Competitor Share
Current year	6088.00	0.00	11.60
One year ago	10335.00	0.00	43.50
Two years ago	8000.00	0.00	35.00

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

SAME OR SLIGHTLY LOWER LEVEL THAN PREVIOUS YEAR

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

- U.S.A.
- U.K.
- WEST GERMANY
- ITALY
- FRANCE
- JAPAN

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

- USA VERY STRONG CHAMBER OF COMMERCE WITH 1600 CORP. MEMBERS, ORGANIZING TECH TRANSFER SEMINARS, A LARGE ANNUAL INVEST IN USA SEMINAR AND NUMEROUS LUNCHEON MEETINGS
- MANY AMERICAN STATES HAVE INVESTMENT AND TRADE OFFICES WHICH PROVIDE SIMILAR SERVICES TO THE ONES WE PROVIDE. THEY ORGANIZE SEMINARS/RECEPTIONS IN PRESTIGE LOCATIONS FOR VISITING DELEGATIONS FROM THEIR STATE/CITY.

RPTDL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: HAGUE, THE

Country: NETHERLANDS

Compared to major competitive destinations, Canada is perceived to have

the following advantages:

- STRONG ECONOMIC GROWTH, LOW ENERGY AND LABOUR COSTS
- OPPORTUNITIES ARISING FROM FTA
- CAN MARKET GOOD TEST MARKET FOR NORTH AMERICAN OPERATION
- QUALITY OF LIFE BETTER THAN U.S.A.

the following constraints:

- LARGE COMPANIES GO WHERE ACTION IS (U.S.A.)
- LIMITED AVAILABILITY OF EXPERIENCED MANPOWER
- TECHNOLOGICALLY LESS ADVANCED THAN U.S.
- F.T.A., YES OR NO?

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

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

The mission believes that the following sectors are of greatest interest to investors in its territory/country with an assigned ranking of 1-10:

Sector	Ranking
Agriculture/Food/Fish	1
Resource Processing	5
Machinery and Equipment	4
Transportation	3
Consumer Products	7
Commercial Service	6
Computer and Communications	9
Health Care Products/Medical	2
Aerospace and Defence	10
Strategic Technologies	8

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: HAGUE, THE

Country: NETHERLANDS

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

Date

Type: DIRECT MAIL CAMPAIGN

DUTCH LANGUAGE PROMOTIONAL BROCHURES & SERVICE FROM COMPUTER CONSULTANTS ON BEHALK OF DIRECT MAIL PROG. 0/89

Location:

Invest Nature: GREENFIELD
JOINT VENTURE
TECH LICENSING

Sector: MULTIPLE SECTORS

Cooperants:

Estimated Budget: \$5,000.00

TARGET SUB-SECTOR: PLASTICS, INDUSTRY EQUIPMENT 0/89

Location:

Invest Nature: JOINT VENTURE
TECH LICENSING

Sector: CHEM PROD & PETROCHEM, EQP, SERV

Cooperants: ISTC/INVCAN PROV. GOV'TS

Estimated Budget: \$1,500.00

SUB-SECTOR: DIES & MOULDING TOOLS 0/89

Location:

Invest Nature: JOINT VENTURE
TECH LICENSING

Sector: INDUSTRIAL MACHIN, PLANTS, SERV.

Cooperants: ISTC/INVCAN PROV. GOV'T

Estimated Budget: \$2,000.00

MAIN SUB-SECTOR; AUTOMOTIVE TRUCKS AND TRAILORS 0/89

Location:

Invest Nature: JOINT VENTURE
TECH LICENSING
GREENFIELD

Sector: TRANSPORT SYS, EQUIP, COMP, SERV.

Cooperants: ISTC/INVCAN PROV. GOV'TS

Estimated Budget: \$1,500.00

MAIN TARGET SUB-SECTORS ARE PHARMACEUTICALS, BIOTECHNOLOGY & EQUIPMENT 0/89

Location:

Invest Nature: JOINT VENTURE
TECH LICENSING

Sector: EDUCATION, MEDICAL, HEALTH PROD

Cooperants: ISTC/INVCAN PROV GOV'TS

Estimated Budget: \$2,000.00

29/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: HAGUE, THE

Country: NETHERLANDS

Date

Type: OUTCALL PROGRAM

MAIN PROMOTION TOOL WILL BE IMPORT PROFILES PREPARED BY ISTC 0/89

Location:

Invest Nature: JOINT VENTURE
TECH LICENSING
GREENFIELD

Sector: MULTIPLE SECTORS

Cooperants: ISTC

Estimated Budget: \$4,500.00

DUTCH VENTURE CAPITAL FIRMS WILL IDENTIFY DUTCH PARTNERS 0/89

Location:

Invest Nature: STRAT. PARTNERS

Sector: MULTIPLE SECTORS

Cooperants: INVCAN/VENTURE ECONOMICS

Estimated Budget: \$3,000.00

FOODHANDLING/PROCESSING AND AQUACULTURE ARE MAIN TARGETS 0/89

Location:

Invest Nature: JOINT VENTURE
TECH LICENSING
GREENFIELD

Sector: AGRI & FOOD PRODUCTS & SERVICE

Cooperants: ISTC INVCAN PROV GOV'TS

Estimated Budget: \$3,000.00

Type: OTHER PROMOTION

LUNCHEON MEETINGS, SEMINARS, COCKTAILS FOR PROVINCIAL AND CITY ECON. DEVELOPMENT AGENCIES. 0/89

Location:

Invest Nature: GREENFIELD
JOINT VENTURE
TECH LICENSING

Sector: MULTIPLE SECTORS

Cooperants: NETHS-CDN CHAMBER OF COMMERCE

Estimated Budget: \$5,000.00

GENERAL SUPPORT FOR CHAMBER ACTIVITIES, INC. DIRECTORY AND NEWSLETTER 0/89

Location:

Invest Nature: GREENFIELD
JOINT VENTURE
TECH LICENSING

Sector: MULTIPLE SECTORS

Cooperants: NETHS-CDN CHAMBER OF COMMERCE

Estimated Budget: \$5,000.00

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: HAGUE, THE

Country: NETHERLANDS

Total estimated budget for all proposals: \$32,500.00

89/06/12 RP-A10 PEMD - Government Initiated Activities 1989

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Post : HAGUE, THE

Start Date Event Name, Location & Type Sector/Post/Contact

89/05/21 SOFTWARE MISSION TO BENELUX
MISSION OUT, INDUSTRY

ADVANCED TECH. PROD. & SERV
G.MCCALLUM

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: VIENNA

Country: AUSTRIA

SIMILAR TO OTHER INDUSTRIALIZED COUNTRIES, THE CRASH ON INTERNATIONAL STOCK EXCHANGE IN THE FALL OF 1987 DID NOT HAVE ANY SIGNIFICANTLY NEGATIVE CONSEQUENCES FOR AUSTRIA'S ECONOMIC DEVELOPMENT IN 1988. ON THE CONTRARY, ECONOMIC ACTIVITY IN AUSTRIA SHOWED NO SIGNS OF SLOWING DOWN OVER FIRST HALF OF 1988. REAL GROSS DOMESTIC PRODUCT INCREASED BY 4.7% FROM THE FIRST HALF OF 1987, POSTING THE HIGHEST GROWTH RATE SINCE 1980. EXPORTS GAINED MOMENTUM AND IN JULY EXCEEDED LAST YEAR'S LEVEL BY 8.5% IN REAL TERMS. WITH THE IMPROVEMENT IN CONSUMER CLIMATE LAST YEAR'S HIGH INCOME GAINS WERE FINALLY CHANNLED INTO THE MARKET PLACE. REAL PRIVATE CONSUMPTION SURGED BY 4.5% IN THE FIRST HALF OF 1988, COMPARED TO LAST YEAR'S LEVEL. IN THE LABOUR MARKET, THE FAVOURABLE TRENDS CONTINUED. AT THE END OF AUGUST THE NUMBER OF JOBS WAS 0.7% ABOVE LAST YEAR'S LEVEL. AT A SEASONAL ADJUSTED BASIS, THE UNEMPLOYMENT RATE STAGNATED AT 5.5%. RISING PRICES OF RAW MATERIALS WERE ROUGHLY OFFSET BY DECLINING ENERGY PRICES. IN AUGUST THE INFLATION RATE WAS ONLY 1.8%.

ONE OF THE INTERESTING FACTORS TO BE NOTED IS A RECENTLY DEVELOPED TENDENCY TOWARDS INTERNATIONALIZATION OF AUSTRIAN ECONOMY. NOTWITHSTANDING ITS RELATIVELY SMALL SIZE AUSTRIA IS TODAY A MODERN INDUSTRIALIZED COUNTRY RANGING IN UPPER THIRD AMONG THE INDUSTRIALIZED NATIONS AND WHOSE EXPORTS ACCOUNT FOR APPROXIMATELY 38% OF GNP. CONSEQUENTLY THE INCREASING INTERCONNECTIONS OF ECONOMIC ACTIVITIES BEYOND NATIONAL AND REGIONAL BORDERS BECAME ONE OF MAJOR AIMS OF AUSTRIAN ECONOMIC POLICY. IN PURSUING THE SEARCH FOR NEW FORMS OF INTERNATIONALIZATION, AUSTRIAN INDUSTRY IS ACTIVELY LOOKING FOR THE MAIN AREAS OF FUTURE ACTIVITIES WHICH COULD BE EITHER JOINT VENTURES, TURNKEY PROJECTS, CONTRACTUAL COOPERATION, TECHNOLOGY AND KNOW-HOW TRANSFERS, CONSULTING AND MANAGEMENT AGREEMENTS, LICENSING AGREEMENTS AND SIMILAR.

AS MARKET FOR CANADIAN GOODS IN AUSTRIA IS WELL ESTABLISHED AND THUS REQUIRES MAINLY RESPONSIVE MONITORING, OUR PLANNED ACTIVITIES WILL MAINLY CONCENTRATE ON PRODUCTIVE JOB CREATING INVESTMENTS, TECHNOLOGY TRANSFERS, JOINT VENTURES, CROSS-LICENSING AND SIMILAR ACTIVITIES. THESE ACTIVITIES WILL COINCIDE WITH AUSTRIAN AIMS OUTLINED ABOVE AND WOULD OFFER MEANINGFUL AREA FOR COOPERATIVE EFFORTS. INASMUCH AS SOME OF THESE WERE INITIATED IN THE PAST THEY WILL BE INTENSIFIED THROUGH POST'S DIRECT CONTACT WITH AUSTRIAN BUSINESS COMMUNITY AND IN SOME INSTANCES IN A CLOSE COOPERATION WITH THE FEDERAL ECONOMIC CHAMBER. THE COOPERATION WITH THE LATTER HAS RESULTED IN MANY SUCCESSFUL UNDERTAKINGS IN THE PAST, AND SEVERAL SIMILAR COOPERATIVE EVENTS ARE ALSO PLANNED FOR THE FUTURE. IN PARTICULAR WE SHALL EXPAND OUR ACTIVITIES IN TECHNOLOGY TRANSFER AND JOINT VENTURE AREAS WHERE WE HAVE HAD ALREADY SOME MEANINGFUL RESULTS AND WHERE THE VERY BEST OPPORTUNITIES LIE. FURTHERMORE, WE SHALL CONCENTRATE ON EXPANSION OF OUR "MISSIONARY" ACTIVITIES, PARTICULARLY THOSE CONNECTED WITH THE AUSTRIAN PERCEPTION OF THE F.T.A. AND ITS CONSEQUENCES TO AUSTRO-CANADIAN ECONOMIC RELATIONS. WE BELIEVE ALSO TO BE ABLE TO CAPITALIZE ON VERY POSITIVE ECONOMIC OUTLOOK FOR AUSTRIA FOR 1989 AND THIS COUNTRY'S TENDENCY TO LEAD

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: VIENNA

Country: AUSTRIA

ITS ECONOMY TOWARDS THE PROCESS OF INTERNATIONALIZATION AND MORE LIBERAL INVESTMENT POLICIES AT HOME AND ABROAD.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 EXPORT PROMOTION PRIORITIES

Mission: VIENNA

Country: AUSTRIA

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

1. ADVANCED TECH. PROD. & SERV
CANADIAN EXPORTS TO AUSTRIA UNDER THIS HEADING CONTINUE TO DEMONSTRATE THEIR STRENGTH AND ARE NOW APPROXIMATELY 12% OF OUR TOTAL TRADE. WE CONTINUE TO ACTIVELY SUPPORT THIS SECTOR, PARTICULARLY TELECOMMUNICATIONS AND INFORMATICS SUBSECTORS.
2. AGRI & FOOD PRODUCTS & SERVICE
EXPORTS OF CANADIAN FOOD PRODUCTS IN GENERAL AND MAPLE SYRUP IN PARTICULAR SHOW 100% INCREASE IN RECENT YEARS.
3. FISHERIES, SEA PRODUCTS & SERV.
FISH AND FISH PRODUCTS ALSO SHOW CONSTANT, ALBEIT MODEST, INCREASE (APPROX. 50% FROM 1984). THEREFORE WE INTEND TO INTENSIFY OUR CONTACTS ON BOTH SIDES.
4. TRANSPORT SYS, EQUIP, COMP, SERV.
RECENT SALES OF CANADIAN AIRCRAFT AND LICENSING AGREEMENT FOR TRUCK MANUFACTURE WILL OFFER THIS SECTOR NOTABLE GROWTH.

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

- | | |
|--------------------------------------|--------------------------------|
| 1. FOREST PRODUCTS, EQUIP, SERVICES | 4. ADVANCED TECH. PROD. & SERV |
| 2. MINE, METAL, MINERAL PROD & SRV | |
| 3. TRANSPORT SYS, EQUIP, COMP, SERV. | |

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: VIENNA

Market: AUSTRIA

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: SEMI & PROCESSED FOOD & DRINK

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	2190.00 \$M	2067.00 \$M	2200.00 \$M	2300.00 \$M
Canadian Exports	3.00 \$M	3.50 \$M	4.00 \$M	5.00 \$M
Canadian Share of Market	0.01 %	0.02 %	0.02 %	0.02 %

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

Major Competing Countries	Market Share
EUROPEAN COMMON MARKET C	51.00 %
OTHER COUNTRIES	25.00 %
COMECON	10.00 %
WEST EUROPE	6.00 %

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

Products/services for which there are good market prospects:

1. MAPLE SYRUP
2. HONEY
3. FOOD SPECIALTIES

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Limited Canadian capabilities

29/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: VIENNA

Market: AUSTRIA

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

Activity: INTENSIFIED CONTACTS WITH AUSTRIAN FOOD TRADE
Expected Results: INCREASE IN EXPORT PERFORMANCE

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

Activity: STIMULATE AUSTRIAN ATTENDANCE AT CDN EXHIBIT AT ANUGA 89
Expected Results: INCREASE IN CONTACTS AND SALES

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: VIENNA

Market: AUSTRIA

Sector : FISHERIES, SEA PRODUCTS & SERV.

Sub-Sector: PROCESSED FISH & SHELLFISH

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	120.00 \$M	129.00 \$M	135.00 \$M	140.00 \$M
Canadian Exports	3.00 \$M	4.00 \$M	5.00 \$M	7.00 \$M
Canadian Share of Market	2.50 %	3.10 %	3.70 %	5.00 %

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

Major Competing Countries Market Share

EUROPEAN COMMON MARKET C	62.00 %
COMECON	10.00 %
WEST EUROPE	8.00 %

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

Products/services for which there are good market prospects:

1. CRUSTACEANS
2. SMOKED FISH
3. SALT WATER FISH (OTHER THAN HERRING)
4. KETAR CAVIAR
5. TROUT

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Trade Fair activity
- Strong sectoral capability in Canada

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Limited Canadian capabilities

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: VIENNA

Market: AUSTRIA

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

Activity: EXTENSIVE CANVASS OF AUSTRIAN FISH MANUFACTURERS & IMPORTERS
Expected Results: INCREASE AWARENESS ABOUT CANADIAN SUPPLY POTENTIAL AND
CONSEQUENT INCREASE IN SALES

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

Activity: ENDEAVOUR TO INCR AWAR OF AUSTRIAN TRADERS IN THIS SECT.
Expected Results: INCREASE IN SALES

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: VIENNA

Market: AUSTRIA

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: COMPUTERS HARD/SOFTWARE & COMP

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1242.00 \$M	1160.00 \$M	1250.00 \$M	1300.00 \$M
Canadian Exports	8.80 \$M	10.10 \$M	12.00 \$M	13.00 \$M
Canadian Share of Market	0.80 %	0.90 %	0.95 %	1.00 %

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

Major Competing Countries	Market Share
GERMANY WEST	32.00 %
UNITED STATES OF AMERICA	24.00 %
JAPAN	15.00 %

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

Products/services for which there are good market prospects:

1. SOFTWARE
2. MINI COMPUTERS
3. COMPUTER PARTS

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Limited Canadian capabilities

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: VIENNA

Market: AUSTRIA

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

Activity: CONTINUATION OF CONTACTS WITH MAJOR AUSTRIAN ORG IN THIS SEC
Expected Results: IMPROVED EXPORT POTENTIAL

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

Activity: INTENSIFIED FOLLOW UP WITH INDUSTRY.
Expected Results: INCREASED SALES, EXTENSION OF COOP EFFORTS INCLUDING VENTURES AND JOINT RESEARCH

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: VIENNA

Market: AUSTRIA

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: AEROSPACE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	180.00 \$M	291.00 \$M	300.00 \$M	320.00 \$M
Canadian Exports	0.50 \$M	14.00 \$M	1.00 \$M	15.00 \$M
Canadian Share of Market	0.03 %	0.50 %	0.03 %	0.50 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	72.00 %
EUROPEAN COMMON MARKET C	20.00 %

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

Products/services for which there are good market prospects:

1. AIRCRAFT
2. SPARE PARTS FOR AIRCRAFT

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Market prospects have not been adequately explored
- AUSTRIAN MKT IS RELATIV SMALL THE-
- REFORE ALMOST HAND-TAILED SALES

29/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: VIENNA

Market: AUSTRIA

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

Activity: ASSIST CDN MANUFACTURER(DEHAVILLAND)WITH THEIR SALES EFFORTS
Expected Results: POSSIBLE PURCHASE OF DASH-8 BY AUSTRIAN AIRLINES

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

Activity: TO MONITOR CDN PARTIC AT INT'L PARIS AIR SHOW IN MAY-JUNE 89
Expected Results: INCREASED AWARENESS IN AUSTRIA OF CANADIAN CAPABILITIES IN THIS SECTOR

29/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTDL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: VIENNA

Country: AUSTRIA

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

	Total (\$ Million)	Canadian Share	Major Competitor Share
Current year	450.00	2.50	38.00
One year ago	460.00	2.50	40.00
Two years ago	500.00	3.00	41.00

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

AUSTRIAN INVESTMENTS ABROAD ARE FAR BELOW THE INTERNATIONAL AVERAGE. AS A MATTER OF FACT, AUSTRIA IS A NET CAPITAL IMPORTER. ONLY IN 1986 AUSTRIAN INVESTMENTS ABROAD EXCEEDED FOREIGN INVESTMENTS IN AUSTRIAN COMPANIES. INVESTMENTS IN CDA MAY ARRIVE AT \$7-10 MILLION IN 1989.

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

- F.R. GERMANY 40%
- SWITZERLAND AND LIECHTENSTEING 20%
- U.S.A. 23%

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

- FRG IS AUSTRIA'S MAJOR TRADING PARTNER AND ACCOUNTS FOR 40% OF TOTAL AUSTRIAN TRADE & INVESTMENT. AS A MATTER OF FACT, THE RELATIONSHIP IS SIMILAR TO ONE BETWEEN TH USA & CDA. THEREFORE, INVESTMENT FLOW BOTH WAYS IS QUITE NATURAL WITHOUT MAJOR PROMOTIONAL EFFORTS ON PART OF FRG.
- SWITZERLAND HAD BEEN TRADITIONALLY ONE OF MOST SOUGHT INVESTMENT AREAS FOR AUSTRIAN INVESTMENT ABROAD. SWISS TAX & FISCAL POLICIES ARE ONE OF MAJOR FACTOR.
- NO VISIBLE ACTIVE PROMOTION OF INVESTMENTS BY U.S.A. AUTHORITIES. SIZE OF THE MARKET AND U.S. ECONOMIC POTENTIAL ARE MAIN FACTORS.

RPTDL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: VIENNA

Country: AUSTRIA

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

- ECONOMIC AND POLITICAL STABILITY
- ACCESS TO NORTH AMERICAN MARKET
- LOW ENERGY COST, ABUNDANCE OF RAW MATERIALS, SKILLED LABOUR
- LOW ENERGY COST, ABUNDANCE OF RAW MATERIALS, SKILLED LABOUR

the following constraints:

- CDN INDUSTRIAL POTENTIAL IS LESS KNOWN THAN COMPETITORS
- RELATIVELY SMALL DOMESTIC MARKET
- CDN ORIENTATION TO USA AND PACIFIC RIM

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

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

The mission believes that the following sectors are of greatest interest to investors in its territory/country with an assigned ranking of 1-10:

Sector	Ranking
Machinery and Equipment	5
Transportation	5
Computer and Communications	5

29/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: VIENNA

Country: AUSTRIA

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

	Date
Type: MISSION OUT, INDUSTRY	
IN COOPERATION WITH PROVINCES & AUSTRIAN INDUSTRY ASS. DIRECT APPROACH TO POTENTIAL INVESTORS	6/89
Location: INNSBRUCK, BREGENZ	
Invest Nature: STRATEGIC PART.	
Sector: CONSUMER PRODUCTS & SERVICES	
Cooperants: PROVINCES	
Estimated Budget: \$2,500.00	
Type: SEMINAR, ABROAD	
ROUND TABLE DISCUSSIONS WITH POTENTIAL INVESTORS	9/89
Location: GRAZ	
Invest Nature: J/V	
TECH LICENSING	
Sector: ADVANCED TECH. PRDD. & SERV	
Cooperants: IND. ASSOC. FED. CHAMBER PROVINCES	
Estimated Budget: \$1,200.00	
ROUND TABLE DISCUSSIONS WITH POTENTIAL INVESTORS	9/89
Location: KLAGENFURT	
Invest Nature: J/V	
TECH. LICENSING	
Sector: ADVANCED TECH. PRDD. & SERV	
Cooperants: IND. ASSOC. FED. CHAMBER PROVINCES	
Estimated Budget: \$1,500.00	
Type: DIRECT MAIL CAMPAIGN	
APPRDACH APPROX. 800-1000 AUSTRIAN COMPANIES RE POTENTIAL INVESTMENT IN COA	10/89
Location:	
Invest Nature: GENERAL	
Sector: MULTIPLE SECTORS	
Cooperants:	
Estimated Budget: \$1,500.00	

Total estimated budget for all proposals: \$6,700.00

89/06/12 RP-A10 PEMD - Government Initiated Activities 1989

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Post : VIENNA

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Post/Contact</u>
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89/06/18	WORLD TECH VIENNA, VIENNA, AUSTRIA INFO BOOTH, ONLY
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ADVANCED TECH. PROD. & SERV MCCALLUM/SCHROETER

29/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPT81

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: PARIS

Country: FRANCE

L'ECONOMIE FRANCAISE CONNAIT EN 1988 UNE ALLURE QU'ELLE N'AVAIT PAS TENUE DEPUIS LONGTEMPS. ALORS QUE LES PREVISIONS FAITES A L'AUTOMNE 1987 ANNONCAIENT UNE CROISSANCE DU PIB EN 1988 DE 2.2% (PREVISIONS REVUES A LA BAISSSE EN AVRIL 1988 A 1.9% A LA SUITE DU KRACH BOURSIER), LA BANQUE DE FRANCE PARLE MAINTENANT D'UN ACCROISSEMENT QUI SE SITUERAIT A 3.5%. CE RYTHME N'EST PAS LE FAIT DU HASARD, MAIS LA CONFIRMATION DE LA REMONTEE DE L'ECONOMIE FRANCAISE DEPUIS 3-4 ANS ET QUI REPOSE ESSENTIELLEMENT SUR: UNE GESTION D'ASSAINISSEMENT DES FINANCES PUBLIQUES; UNE POLITIQUE DE RIQUEUR AU NIVEAU DES PRIX, DES COUTS ET DES SALAIRES (QUOIQUE LES PRIX AIENT ETE LIBERALISES L'AN DERNIER); ET UNE INCITATION A LA MODERNISATION ETA LA RATIONALISATION DE LA PRODUCTION QUI ONT POUR BUT D'AMELIORER LA COMPETITIVITE DE L'INDUSTRIE HEXAGONALE. LE SUIVI CONSISTANT DE CES POLITIQUES A PRODUIT UNE NOUVELLE CONFIANCE DANS L'ECONOMIE. LES EFFETS SE SONT FAIT RESSENTIR DANS LES RESULTATS DES SOCIETES (AUGMENTATION QUASI-GENERALE ET SUBSTANTIELLE DES MARGES DE REVENUS) ET, EN PARTICULIER, DANS LES TAUX D'INVESTISSEMENT DE CELLES-CI: AINSI AU PREMIER SEMESTRE DE 1988, LES VENTES ET LES INTENTIONS DE COMMANDES EN BIENS D'EQUIPEMENTS ETAIENT A LEUR PLUS HAUT NIVEAU DEPUIS LA FIN DES ANNEES 1970. LA CROISSANCE ATTENDUE DU PIB EN 1989 EST DE 2.6%; L'INFLATION EST MAITRISEE ET LA HAUSSE DES PRIX EN 1989 DEVRAIT ETRE DE L'ORDRE DE 2.2% (2.8% EN 1988). AVEC LA POURSUITE DES INVESTISSEMENTS PRODUCTIFS, UNE LEGERE AMELIORATION DEVRAIT SE PRODUIRE AU CHAPITRE DE L'EMPLOI (LE TAUX DE CHOMAGE OSCILLE EN OCTOBRE 1988 AUX ALENTOURS DE 10%). SIGNE ENCOURAGEANT, LA CAPACITE DE PRODUCTION INSTALLEE DANS L'INDUSTRIE MANUFACTURIERE EST UTILISEE EN MOYENNE A 85%. LES ECHANGES COMMERCIAUX FRANCAIS ONT SUBI LE CONTRECROUP DE CETTE BONNE SANTE DES INVESTISSEMENTS PRODUCTIFS. LE DEFICIT COMMERCIAL GLOBAL QUI ETAIT DE FF 0.4 MILLIARDS EN 1986 EST PASSE A FF 30.7 MILLIARDS EN 1987. CETTE DEGRADATION EST DUE PRINCIPALEMENT AU FAIT QUE LE SOLDE INDUSTRIEL (ACHATS D'EQUIPEMENTS SURTOUT) EST DEvenu DEFICITAIRE POUR LA PREMIERE FOIS DEPUIS 1969 A -FF 10.3 MILLIARDS. POUR 1988, LA REDUCTION DE LA FACTURE ENERGETIQUE ET LA BONNE TENUE DES EXPORTATIONS AGRO-ALIMENTAIRES PERMETTENT DE PREVOIR UNE BAISSSE DU DEFICIT A FF 25 MILLIARDS MALGRE LA POURSUITE SOUTENUE DES INVESTISSEMENTS INDUSTRIELS. EN 1987, LES ECHANGES COMMERCIAUX ENTRE LA FRANCE ET LE CANADA ONT POUR LA PREMIERE FOIS FRANCHI LA BARRE DES C\$ 3 MILLIARDS AVEC DES EXPORTATIONS VERS LA FRANCE DE C\$ 1.437 MILLIARD ET DES IMPORTATIONS DE C\$ 1.921 MILLIARD (SUR LA BASE DES STATISTIQUES DOUANIERES FRANCAISES). CELA A PRODUIT UNE DETERIORATION DU SOLDE COMMERCIAL, MALGRE UNE TENUE FAVORABLE DU DOLLAR, MAIS A AUSSI CORRESPONDU A LA LIVRAISON DES PREMIERS AIRBUS COMMANDES PAR WARDAIR. IL FAUT S'ATTENDRE A UNE AGGRAVATION POUR LES PROCHAINS MOIS ET ANNEES (65 AIRBUS VENDUS EN TOUT AU TROIS GRANDES SOCIETES DE TRANSPORT AERIEN CANADIENNES). EN EFFET, POUR LES 8 PREMIERS MOIS DE 1988, NOS IMPORTATIONS DE FRANCE SE CHIFFRENT DEJA A C\$ 1.739 MILLIARD (EXPORTATIONS: C\$ 0.988 MILLIARD). CELA DONNE DEJA UNE MESURE DU DEFI A RELEVER QUI S'OFFRE A NOS EXPORTATEURS

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RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: PARIS

Country: FRANCE

ET A NOS SERVICES. NOUS CONTINUERONS DE MISER SUR LES SECTEURS PORTEURS (AGRO-ALIMENTAIRE, HAUTE TECHNOLOGIE) EN ENCOURAGEANT LES PARTENARIATS ET LES ECHANGES TECHNOLOGIQUES. A CETTE FIN, NOUS COMPTONS MIEUX INTEGRER LES ACTIVITES DE L'ANTENNE COMMERCIALE ET ECONOMIQUE DU CONSULAT DE LYON SOUS-MARINS) UNE ACTION D'ENVERGURE AXES SUR LE DEVELOPPEMENT DE LA COOPERATION INDUSTRIELLE ENTRE LES DEUX PAYS.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 EXPORT PROMOTION PRIORITIES

Mission: PARIS

Country: FRANCE

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

1. AGRI & FOOD PRODUCTS & SERVICE
SECTEUR A FORT POTENTIEL D'EXPORTATION; BONNE REPONSE DU MARCHE. ATOUT CANADIEN DANS PRODUITS SPECIAUX. SECTEUR A FORTE CONCENTRATION POUR POLITIQUE COMMERCIALE: PROBLEMES D'ACCES; QUESTIONS TOUCHANT PDL. AGR. FRANCAISE; QUESTIONS SUR BLE, OLEAGINEUX, CEREALES, PROTEAGINEUX.
2. ADVANCED TECH. PROD. & SERV
POTENTIEL ACCRU EN RAISON DE DEREGLEMENTATION ET DE L'ECHANCE DU MARCHE UNIQUE (1992). RECONNAISSANCE PAR MARCHE D'AVANCE TECHNOLOGIQUE CANADIENNE (PABX - CABLO-DISTRIBUTION).
3. DEFENCE PROGRAMS, PRODUCTS, SERV
SERIEUX DES FIRMES CANADIENNES EN MATIERE DE DEFENSE ET SECURITE; POTENTIEL ENORME EN COOP. IND. SI GRANDS PROJETS ABOUTISSENT (EX.: SOUS-MARINS); INTERET DES FIRMES FRANCAISES A COOPERER.
4. ADVANCED TECH. PROD. & SERV
MARCHE EN PLEINE CROISSANCE ET OUVERT; SUCCES REMPORTES PAR SOCIETES CANADIENNES DANS DOMAINE DES LOGICIELS. SOUPLESSE D'ADAPTATION AUX EXIGENCES DU MARCHE FRANCAIS.
5. CONSTRUCTION INDUSTRY
SECTEUR TRES PORTEUR EN FRANCE ET QUI SE PRETE BIEN A NOS OBJECTIFS DE RECHERCHE DE PARTENAIRES TECHNOLOGIQUES.
6. OTHER SERVICES
SOCIETES DE DISTRIBUTION FRANCAISES (GRANDES SURFACES; CENTRALES D'ACHATS) OFFRENT DEBOUCHES INTERESSANTS POUR NOS BIENS DE CONSOMMATION (FOOD ET NON-FOOD); BONNE REACTION DU MARCHE.

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

- | | |
|--------------------------------------|-------------------------------------|
| 1. FOREST PRODUCTS, EQUIP, SERVICES | 4. MINE, METAL, MINERAL PROD & SRV |
| 2. MINE, METAL, MINERAL PROD & SRV | 5. FOREST PRODUCTS, EQUIP, SERVICES |
| 3. TRANSPORT SYS, EQUIP, COMP, SERV. | 6. AGRI & FOOD PRODUCTS & SERVICE |

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: PARIS

Market: FRANCE

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: ANIMAL, POULTRY BREEDING STOCK

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	706.60 \$M	687.40 \$M	650.00 \$M	670.00 \$M
Canadian Exports	3.30 \$M	3.60 \$M	3.50 \$M	4.50 \$M
Canadian Share of Market	0.47 %	0.53 %	0.54 %	0.67 %

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

Major Competing Countries

Market Share

NETHERLANDS	28.10 %
BELGIUM	27.90 %
UNITED KINGDOM	17.30 %
GERMANY WEST	6.70 %
UNITED STATES OF AMERICA	4.90 %
POLAND	4.40 %

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

Products/services for which there are good market prospects:

1. VEAUX D'ENGRAISSEMENT
2. EMBRYONS BOVINS
3. SPERME BOVIN
4. BOVINS REPRODUCTEURS
5. PORCINS REPRODUCTEURS
6. EMBRYONS CHEVRES
7. CHEVRES ANGORA
8. CHEVAUX
9. VOLAILLES
10. BISON
11. APPATS DE PECHE
12. CHIENS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PARIS

Market: FRANCE

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Import duties are low
- Fairs and Missions support
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- QUALITE & SALUBRITE SUPE-
- RIEURES DU TROUPEAU CANA-
- DIEN

Factors for Canadian exports not reaching market potential:

- Restrictive standards
- Lack of promotion and advertising
- Market prospects have not been adequately explored
- ACCORD SANITAIRE SUR VEAUX RECU
- QU'AU MOIS D'OCTOBRE 1988

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

Activity: MISE A JOUR CONTINUELLE DES LISTES D'IMPORTATEURS
Expected Results: MEILLEUR CIBLAGE DES CONTACTS PRIORITAIRES

Activity: RECHERCHE SUR LE MARCHE DE PORCINS REPRODUCTEURS
Expected Results: INCITATION DES EXPORTATEURS CANADIENS

Activity: OBTENTION DU CERTIFICAT SANITAIRE POUR LE BISON
Expected Results: VENTES INITIALES

Activity: S'OCCUPER DES PROBL.D'ACCES & DES BARRIERES NON-TARIFAIRES
Expected Results: PROTEGER LES DEBOUCHES PRESENTS ET EN OUVRIR D'AUTRES

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PARIS

Market: FRANCE

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

Activity: SALON INTERNATIONAL DE L'AGRICULTURE (MARS 1989)
Expected Results: AUGMENTATION DE LA VALEUR ET DE LA GAMME DE PRODUITS
EXPORTES

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

Activity: MISS.FRANCAISE A L'ONT.PDRK CONG(AVEC APPUI FIN.DE L'ONT)
Expected Results: INCITATION DE L'INTERET FRANCAIS AUX RACES CANADIENNES

Activity: AMELIORATION DE LIAISON AVEC PRODUCT.FRANC.DE REPROD.PORCINS

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: PARIS

Market: FRANCE

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: SEEDS & SPECIAL CROPS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1307.90 \$M	1467.80 \$M	1400.00 \$M	1450.00 \$M
Canadian Exports	10.60 \$M	15.40 \$M	11.50 \$M	14.50 \$M
Canadian Share of Market	0.81 %	1.05 %	0.82 %	1.00 %

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

Major Competing Countries	Market Share
NETHERLANDS	38.90 %
GERMANY WEST	13.70 %
BELGIUM	8.90 %
UNITED STATES OF AMERICA	4.70 %
UNITED KINGDOM	2.30 %
DENMARK	1.90 %

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

Products/services for which there are good market prospects:

1. LENTILLES
2. MAIS DE SEMENCE
3. SOJA DE SEMENCE
4. POIS DE SEMENCE
5. TREFLE DE SEMENCE
6. FLEOLE DE SEMENCE
7. ALPISTE
8. HARICOTS ECOSSES
9. POIS ECOSSES

Factors contributing to current successful Canadian exports:

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

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PARIS

Market: FRANCE

Factors for Canadian exports not reaching market potential:

- Restrictive standards
- Non-competitive pricing

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

Activity: MISE A JOUR CONTINUELLE DES LISTES D'IMPORTATEURS POTENTIELS
Expected Results: MEILLEUR CIBLAGE DES CONTACTS

Activity: S'OCCUP.DES PROB.D'ACCES & BARRIERES NON-TARIFAIRES
Expected Results: PROTEGER LES DEBOUCHES PRESENTS ET EN OUVRIR D'AUTRES

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

Activity: SEM.D'AGRIC.CDA EN NOV.1989 SUR LES LEGUMES SECS
Expected Results: MEILLEURE CONNAISSANCE DES IMPORTATEURS CONCERNANT DISPONIBILITE ET QUALITE CANADIENNES.

Activity: 2E CONSUL.A HAUT NIVEAU DES AGENTS S'OCCUP.DES REL.PHYTOSAN.
Expected Results: MEILLEURE GESTION DES PROBLEMES CANADA/FRANCE ET CANADA/CEE

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: PARIS

Market: FRANCE

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: MEATS & MEAT BY-PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	3435.30 \$M	3722.30 \$M	3500.00 \$M	3600.00 \$M
Canadian Exports	25.00 \$M	31.40 \$M	30.50 \$M	31.50 \$M
Canadian Share of Market	0.72 %	0.84 %	0.87 %	0.88 %

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

Major Competing Countries Market Share

BELGIUM	17.90 %
UNITED KINGDOM	16.70 %
NETHERLANDS	15.00 %
GERMANY WEST	13.80 %
IRELAND	8.10 %
DENMARK	7.80 %

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

Products/services for which there are good market prospects:

1. CHARCUTERIE
2. ABATS
3. VIANDE CHEVALINE

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- Competitive pricing

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Import duties are high
- Restrictive standards
- Lack of promotion and advertising
- Limited Canadian capabilities
- Market prospects have not been adequately explored
- TAUX DE DOUANES ELEVES

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PARIS

Market: FRANCE

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

Activity: MISE A JOUR CONTINUELLE DES LISTES D'IMPORTATEURS POTENTIELS
Expected Results: MEILLEUR CIBLAGE DE NOS CONTACTS PRIORITAIRES

Activity: CONCERTATION AVEC AUTRES MISS. EN EUROPE, EXTOTT & AGRICOTT
Expected Results: PLAN POUR SUPPRIMER TAUX DE DOUANE PROHIBITIF (RECLASSIFICATION DU NEGOCIATIONS DANS GATT).

Activity: S'OCCUPER DES PROBLEMES D'ACCES ET BARRIERES NON-TARIFAIRES
Expected Results: PROTEGER LES DEBOUCHES PRESENTS ET EN OUVRIR D'AUTRES

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

Activity: VIS.AU CDA D'UNE MISS. DE VETERINAIRES S'OCCUP. HYG. SANITAIRE
Expected Results: FACILITATION DE LA RESOLUTION DES PROBLEMES DU COMMERCE FUTUR.

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: PARIS

Market: FRANCE

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: SEMI & PROCESSED FOOD & DRINK

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	3027.50 \$M	3714.10 \$M	3811.00 \$M	4000.00 \$M
Canadian Exports	8.70 \$M	13.70 \$M	14.50 \$M	15.60 \$M
Canadian Share of Market	0.28 %	0.37 %	0.38 %	0.39 %

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

Major Competing Countries

Market Share

ITALY	16.20 %
BELGIUM	15.90 %
GERMANY WEST	13.30 %
NETHERLANDS	12.40 %
UNITED KINGDOM	10.40 %
SPAIN	3.80 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. MYRTILLES SURGELEES
2. MIEL
3. WHISKY
4. SEVE D ERABLE
5. FARINE DE MOUTARDE
6. MAIS ET CONSERVE
7. BIERE
8. VIN

Factors contributing to current successful Canadian exports:

- Import duties are moderate
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Canada is one of few sources of supply
- Strong sectoral capability in Canada

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PARIS

Market: FRANCE

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Import duties are high
- Non-competitive pricing
- Lack of promotion and advertising
- Unsuitable product

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: PARIS

Market: FRANCE

Sector : FISHERIES, SEA PRODUCTS & SERV.

Sub-Sector: FISH & SHELLFISH & OTHER PROD

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	2099.40 \$M	2662.30 \$M	2800.00 \$M	2950.00 \$M
Canadian Exports	93.80 \$M	109.00 \$M	118.00 \$M	125.00 \$M
Canadian Share of Market	4.50 %	4.10 %	4.20 %	4.20 %

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

Major Competing Countries Market Share

UNITED KINGDOM	11.20 %
NORWAY	9.00 %
DENMARK	8.50 %
SENEGAL	6.50 %
NETHERLANDS	4.90 %
UNITED STATES OF AMERICA	4.60 %

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

Products/services for which there are good market prospects:

1. SAUMON CONGELE
2. HOMARD VIVANT
3. HOMARD CONGELE
4. FILETS CONGELES DE CABILAUD
5. BROCHETS CONGELES
6. MURUE SALEE
7. CREVETTES CONGELEES
8. AUTRES POISSONS D'EAU DOUCE
9. LOTTES
10. CRABE CONGELE

Factors contributing to current successful Canadian exports:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PARIS

Market: FRANCE

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Unsuitable product
- LES MARCH.PLUS ATTRAYANTS(DU PLUS
- FACILE D'ACCES)TELS QUE JAP & E.-U.

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

Activity: ETUDES SUR SAUMON,HOMARD & CRABE & DIFF.AUPRES DES EXPORT.
Expected Results: APRES DIFFUSION MEILLEURE CONNAISSANCE DU MARCHÉ ET AUGMENTATION POSSIBLE DES PARTS DE MARCHÉ.

Activity: REMISE A JOUR DE NOS LISTES D'IMPORT.GRACE A UN MAILING/INTE
Expected Results: MEILLEUR CIBLAGE DES IMPORTATEURS ET AUGMENTATION DES VENTES

Activity: S'OCCUPER DES PROBLEMES D'ACCES ET BARRIERES NON-TARIFAIRES
Expected Results: PROTEGER LES DEBOUCHES PRESENTS ET EN OUVRIR D'AUTRES.

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

Activity: RAPP.SUR LES PREV.DE MARCH.POUR LES ESP.PRINC.DE PROD.PECHE
Expected Results: INFORMATION DISTRIBUEE A EXTOTT/TAF ET PECHEES ET OCEANS.
MEILLEURE CONNAISSANCE DE L'EVOLUTION DU MARCHÉ FRANCAIS.

Activity: SUIVI DANS LA PRESSE FRANC.& DIV.PUBL.DISP.DES NEG.FRANCE/CD
Expected Results: MEILLEURE INFORMATION DE L'EVOLUTION DU DOSSIER VU EN FRANCE
PAR LES MEDIAS

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: PARIS

Market: FRANCE

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	229.00 \$M	264.00 \$M	310.00 \$M	350.00 \$M
Canadian Exports	10.80 \$M	10.10 \$M	10.50 \$M	15.00 \$M
Canadian Share of Market	4.70 %	3.80 %	3.10 %	4.20 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	50.00 %
GERMANY WEST	15.00 %
UNITED KINGDOM	15.00 %
ITALY	10.00 %
OTHER COUNTRIES	10.00 %

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

Products/services for which there are good market prospects:

1. DRONES
2. WATER BOMBERS
3. SOUS-MARINS (COMPOSANTS ELECTRONIQUES, EQUIP, NAVAL)
4. ERYX (MISSILE)
5. EQUIPEMENT SECURITE INCENDIE

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Fairs and Missions support
- Competitive pricing
- willingness of exporters to invest/joint venture in territory

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PARIS

Market: FRANCE

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- Limited Canadian capabilities
- Market prospects have not been adequately explored

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

Activity: EQUIPEMENT & SERVICES POUR COMBAT DES INCENDIES.
Expected Results: VENTE AU MINISTERE INTERIEUR (SECURITE CIVILE)

Activity: PROJET CASAP (SOUS-MARINS)
Expected Results: ASSURER MEILLEURE PARTICIPATION INDUSTRIELLE CANADIENNE AU PROJET.

Activity: CL-289: APPUI DES EFF. DE CANADAIR POUR VENT. DANS PAYS TIERS.
Expected Results: ACCORD AVEC SOCIETE FRANCAISE POUR VENTE MOYEN ORIENT ET AFRIQUE.

Activity: PROJETS TICCS ET ERYX.
Expected Results: ACCORDS AVEC SOCIETES CANADIENNES ET EXPORTATION TECHNOLOGIE

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

Activity: PARIS AIR-SHOW 89
Expected Results: EXPOSITION INDUSTRIE CANADIENNE POUR ACCROISSEMENT EXPORTATION.

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

Activity: SUIVI OFFRES FRANCAISES CHARS LECLERC & VEHIC. BLINDE LEGER.
Expected Results: JV ET TRANSFERTS DE TECHNOLOGIE.

Activity: MISSION GDA AU CDA POUR EXPLICATIONS PROCEDURES ACHAT.
Expected Results: SOUMISSION ACCRUE INDUSTRIE CANADIENNE SUR PROJETS FRANCAIS.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: PARIS

Market: FRANCE

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: TELECOM, DATACOM, SAT, SPACECOM

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	141.00 \$M	218.00 \$M	269.00 \$M	333.00 \$M
Canadian Exports	2.60 \$M	1.60 \$M	1.90 \$M	2.30 \$M
Canadian Share of Market	1.80 %	0.70 %	0.70 %	0.70 %

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

Major Competing Countries	Market Share
JAPAN	22.00 %
UNITED STATES OF AMERICA	16.00 %
ITALY	11.00 %
GERMANY WEST	10.00 %
UNITED KINGDOM	7.00 %

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

Products/services for which there are good market prospects:

1. AUTOCOMMUTATEURS PRIVES (PABX)
2. MESSAGERIE, COURIER ELECTRON.
3. RECEPTEURS DE SATELLITE
4. SYSTEMES DE TRANSMISSION DE DONNEES.
5. MODEMS

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- willingness of exporters to invest/joint venture in territory

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PARIS

Market: FRANCE

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Restrictive quotas
- Restrictive standards
- Unsuitable product
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored
- Performance of local agent or representative

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

Activity: RAPP SUR LE MARCH FRANCOIS, Y COMP LES EFF DE L'ACC EUROP. DE 92
Expected Results: AUGMENTATION DE LA PARTICIPATION CANADIENNE AU MARCH FRANCAIS.

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

Activity: INFO BOOTH ET MISSION, T⁸⁹
Expected Results: PARTICIPATION DE NOUVELLES SOCIETES CANADIENNES AU MARCH FRANCAIS.

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

Activity: SEMINAIRE, HAUTE TECHNOLOGIE
Expected Results: PROMOTION DE NOUVELLES TECHNOLOGIES ET SOCIETES.

Activity: VISITE DU DOCOTT A FRANCE TELECOM ET SECTEUR PRIVE.
Expected Results: MEILLEURE INFORMATION SUR LE MARCH & EVENTUELLEMENT AUGMENTATION DE PARTICIPATION CANADIENNE AU MARCH.

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: PARIS

Market: FRANCE

Sector : ELECTRONICS EQUIP. & SERV

Sub-Sector: INSTRUMENTATION

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	5728.60 \$M	6630.00 \$M	5250.00 \$M	5600.00 \$M
Canadian Exports	52.20 \$M	67.40 \$M	57.50 \$M	62.00 \$M
Canadian Share of Market	0.90 %	1.02 %	1.10 %	1.00 %

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

Major Competing Countries

Market Share

GERMANY WEST	6.50 %
UNITED STATES OF AMERICA	2.50 %
JAPAN	2.40 %
ITALY	2.50 %
UNITED KINGDOM	1.40 %
BELGIUM	1.60 %

Current Status of Canadian

exports in this sector/subsector: Mature with little growth

Products/services for which there are good market prospects:

1. DISPOSITIFS A SEMI-CONDUCTEURS
2. CIRCUITS IMPRIMES RIGIDES
3. PART.& PIECES D'APP.ELECTRI.DE SIGN.ACOUST.DU VISU
4. APPA.ELECTRIQUES DU AU LASER A SOUDER/COUPER MAT.
5. PHOTODIODES, PHOTOTRANSISTORES
6. APP.ELECTRI.OU AU LASER A SOUDER,COUPER METAUX
7. PIECES OUTIL ET MACHINE-OUTIL ELECTROMECHANIQUES
8. TUBES POUR HYPERFREQUENCE

Factors contributing to current successful Canadian exports:

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

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PARIS

Market: FRANCE

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- Performance of local agent or representative

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

Activity: POURS.DES ACTIONS MKTG, TELLES QUE MAILING AUX PRINC. IMPORT.
Expected Results: AMELIORATION DE LA CONNAISSANCE DES EQUIP. CANAD/ETABLIS.
LIENS AFFAIRES

Activity: REACTUAL'N, CONT DES PRINC. FABRIC. LOCAUX OUVERTS AUX OPP J.V.

Activity: APPUI AUX SOUMISS. CDNS D'APPELS D'OFFRES POUR MARCH PUBL/PRI
Expected Results: EVALUATION AFFINEE DU POTENTIEL D'AFFAIRES

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

Activity: REALISAT. ETUDE SECT'L, REPORTAGE ECONO, INTEG. IMPACT DU MARCH.
Expected Results: DIVERSIFIER LA GAMME DES PRODUITS CANADIENS DEJA INTRODUITS
SUR LE MARCHÉ.

Activity: MAINTIEN DES CUNT. EXIST. AVEC LES PRINC. DISTRIB. NAT. DE MAT.

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: PARIS

Market: FRANCE

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: AUTOMDTIVE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	2137.40 \$M	2595.00 \$M	2800.00 \$M	3030.00 \$M
Canadian Exports	14.70 \$M	15.40 \$M	13.90 \$M	15.00 \$M
Canadian Share of Market	0.70 %	0.60 %	0.50 %	0.50 %

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

Major Competing Countries Market Share

GERMANY WEST	35.20 %
SPAIN	14.70 %
ITALY	13.60 %
BELGIUM	9.00 %
JAPAN	6.40 %
UNITED KINGDOM	5.60 %

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

Products/services for which there are good market prospects:

1. AUTRES CHARIOTS MUNIS SYST DE LEVAGE DE LEUR CHAR.
2. DUMPERS A MOTEUR >10000 CM3 (TOMBREAUX AUTOMOBILES)
3. PIECES ET ACCESS. POUR VEHIC. AUTO. DE TRANSP. MARCH.
4. AUTRES ORGANES DE TRANSMISSIONS

Factors contributing to current successful Canadian exports:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PARIS

Market: FRANCE

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Unsuitable product
- Limited appreciation/understanding of distribution system
- Performance of local agent or representative

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

Activity: MAILING AUPRES DES SOCIETES IMPORTATRICES FRANCAISES
Expected Results: CONNAISSANCE ACCRUE DES CAPACITES & PRODUITS CANADIENS ET
ETABLISSEMENTS LIENS D'AFFAIRES DIRECTS.

Activity: RECH. & APPROF. DES DPP. D'IMPORT. & DE COOP. TECHN. TELLES QUE
Expected Results: MEILLEUR POSITIONNEMENT DANS LE RESEAU COMPLEXE DE LA DIS-
TRIBUTION & IDENTIFICATION DE PARTENAIRES POTENTIELS.

Activity: MISE A JOUR & DIFF. PLUS LARGE DE FICHES "EXPORT. A" MISES A DIS
Expected Results: SENSIBILISATION AUX PROBLEMES DE STANDARDISATION

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

Activity: EQUIP'AUTO (OCT 89)
Expected Results: DEGAGER NOUVELLES OPPORTUNITES D'AFFAIRES.

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

Activity: MISS D'EXPORT CDNS DE PIECES & EQUIP. VIS. APPUYEES PAR PEMO.
Expected Results: DEFINIR LES CONDITIONS D'UNE MEILLEURE PENETRATION A LONG
TERME

Activity: INTEG. DES ELEM. D'INFORM. FOURNIS PAR LES DEL. DE MEIR EN ONT.
Expected Results: ETABLIR UNE ADEQUATION OFFRE/DEMANDE POUR LES PIECES DE
RECHANGE.

Activity: MAINT. CONT. & RENC. D'INDUST. EN PART. LORS DES MANIF. NAT'L/REG.
Expected Results: SUIVRE L'EVOLUTION DES TECHN. LIEES A L'AUTOMATISATION DE LA
PRODUCTION DE PIECES AUTOMOBILES.

Activity: IMPACTS DU MARCHE UNIQUE EUROP. SUR SECT. PIECES & ACCESS. AUTO
Expected Results: PROBLEMES: AGREMENTS/NORMES TECHNIQUES.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: PARIS

Market: FRANCE

Sector : FOREST PRODUCTS,EQUIP,SERVICES

Sub-Sector: WOOD AND WOOD PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1761.00 \$M	2047.00 \$M	2200.00 \$M	2400.00 \$M
Canadian Exports	51.00 \$M	70.00 \$M	90.00 \$M	110.00 \$M
Canadian Share of Market	2.90 %	3.40 %	4.00 %	4.50 %

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

Major Competing Countries Market Share

GERMANY WEST	11.10 %
BELGIUM	10.00 %
FINLAND	9.80 %
SWEDEN	5.70 %
GABON	5.50 %
ITALY	5.40 %

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

Products/services for which there are good market prospects:

1. BOIS D'OEUVRE RESINEUX
2. BOIS DUVRES
3. MENUISERIES
4. CONTREPLAQUE
5. PANNEAUX

Factors contributing to current successful Canadian exports:

- Fairs and Missions support
- Trade Fair activity
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- MARCHE SOUMIS AUX VARIATIONS DU DOLLAR

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PARIS

Market: FRANCE

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Restrictive quotas

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

Activity: PROM. DE L'UTILIS. DES PROD. CDNS DANS LA CONSTR. ENC. MISS. CDA
Expected Results: DEVELOPPER DEMANDE DES UTILISATEURS.

Activity: PARTICIPATION A SEMINAIRES SECTORIELS.
Expected Results: DEVELOPPER DEMANDE DES UTILISATEURS

Activity: SURVEILLER PROBLEMES D'ACCES, BARRIERES NON-TARIFAIRES.
Expected Results: FACILITER EXPORTATIONS.

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

Activity: PARTICIPATION A BATIMAT 89.
Expected Results: \$ 10 A 12 MILLIONS

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

Activity: DEV. NOUV. CONT. FRANCAIS POUR IMPORTATION BOIS OUVRES.
Expected Results: TROUVER NOUVEAUX DEBOUCHES.

Activity: SURV. MISE EN PLACE DE HARM. CODES & NORMES PREVUE POUR 1992.
Expected Results: MAINTENIR HAUT VOLUME DU MARCHE.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: PARIS

Market: FRANCE

Sector : MINE, METAL, MINERAL PROD & SRV

Sub-Sector: MINERALS AND MINERAL PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	2089.00 \$M	1704.00 \$M	1554.00 \$M	0.00 \$M
Canadian Exports	292.00 \$M	259.00 \$M	236.00 \$M	0.00 \$M
Canadian Share of Market	14.00 %	15.20 %	15.20 %	0.00 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	18.40 %
BRAZIL	5.50 %
POLAND	2.80 %
AUSTRALIA	8.70 %
PERU	3.60 %
SWEDEN	1.90 %

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

Products/services for which there are good market prospects:

1. MINERAIS DE FER AGGLOMERES
2. MINERAIS DE ZINC
3. HOUILLES A COKE
4. MINERAIS DE TITANE
5. SOUFRE
6. AMIANTE
7. MINERAIS DE PLOMB
8. MINERAIS DE MOLYBDENE
9. NICKEL BRUT NON-ALLIE
10. ALUMINIUM BRUT EN LINGOT
11. ALUMINIUM BRUT EN PLAQUE OU BILLETTE
12. DR ET ALLIAGE ADMISSION TEMPORAIRE

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PARIS

Market: FRANCE

Factors contributing to current successful Canadian exports:

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

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

Activity: RAPPORT SUR AMIANTE EN FRANCE
Expected Results: MEILLEURE VUE SUR L'INDUSTRIE & FAIRE CONNAITRE AUX SOCIETES FRANCAISES LES DIFFERENTES QUALITES DU CHARBON CANADIEN.

Activity: MAILING RAPP SUR LE CHARBON CDN AUX SOCIETES FRANCAISES
Expected Results: ACCROISSEMENT DES VENTES

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

Activity: REALISATION DE RAPPORTS SUR: CHARBON - TITANE
Expected Results: MIEUX CONTROLER L'EVOLUTION DU SECTEUR EN FRANCE

Activity: FAIRE PARVENIR A OTT REGULIEREMENT DES COUPURES DE JOURNAUX

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: PARIS

Market: FRANCE

Sector : CHEM PROD & PETROCHEM, EQP, SERV

Sub-Sector: CHEM & PETROCHEM PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	17413.00 \$M	20293.00 \$M	21060.00 \$M	0.00 \$M
Canadian Exports	98.60 \$M	79.50 \$M	82.10 \$M	0.00 \$M
Canadian Share of Market	0.57 %	0.39 %	0.39 %	0.00 %

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

Major Competing Countries	Market Share
GERMANY WEST	26.20 %
BELGIUM	13.80 %
NETHERLANDS	11.00 %
UNITED KINGDOM	9.90 %
UNITED STATES OF AMERICA	8.70 %
SWITZERLAND	6.80 %

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

Products/services for which there are good market prospects:

1. URANIUM NATUREL, COMPOSES ET ALLIAGES
2. CHLDRURE DE POTASSIUM
3. STYRENE POUR AUTRES QUE 4
4. STYRENE POUR CAOUTCHOUC SYNTHETIQUE
5. MAT. PLASTIQUES & PROD. CAOUTCHOUC & PRODUITS
6. ELEMENTS RADIOACTIFS, ISOTUPES COMPOSES & ALLIAGES
7. CAOUTCHOUC ET OUVRAGES EN CAOUTCHOUC
8. PRODUITS PHARMACEUTIQUES
9. PRODUITS DIVERS

Factors contributing to current successful Canadian exports:

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

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PARIS

Market: FRANCE

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising

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

Activity: MATCHING DES 2 ETUDES(CDA/FRANCE) SUR LE MARCH DE LA CHIMIE
Expected Results: AUGMENTATION DES EXPORTATIONS

Activity: IMPLEMENTATION DU PROGRAMME WIN

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

Activity: RENCONT. LES PRINC. DISTRIB/IMPORTATEURS DE PRODUITS CHIMIQUES
Expected Results: AUGMENTATION DES EXPORTATIONS

Activity: EN VUE DE L'EUROPE DE 92, SUIVRE CE QUI SERA FAIT EN MAT. REG.
Expected Results: AUGMENTATION DES EXPORTATIONS.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: PARIS

Market: FRANCE

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: LEISURE PROD. TOOLS HARDWARE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1903.00 \$M	2451.00 \$M	2600.00 \$M	2800.00 \$M
Canadian Exports	4.40 \$M	9.40 \$M	10.00 \$M	11.00 \$M
Canadian Share of Market	0.20 %	0.40 %	0.40 %	0.50 %

Major Competing Countries

Market Share

GERMANY WEST	13.20 %
ITALY	11.00 %
TAIWAN	9.40 %
UNITED KINGDOM	7.40 %
UNITED STATES OF AMERICA	5.30 %
SPAIN	5.10 %

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

Products/services for which there are good market prospects:

1. QUINCAILLERIE, JARDINAGE
2. ARTICLES SPORT
3. ACCESSOIRES PISCINES

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Import duties are low
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Trade Fair activity

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Unsuitable product
- Limited appreciation/understanding of distribution system
- Limited Canadian capabilities
- LACK OF FOLLOW-UP

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PARIS

Market: FRANCE

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

Activity: CONT A AIDER LES EXPORT.CDNS A PENET.DANS LES GRANDES SURF.
Expected Results: ACCROISSEMENT DES VENTES DE PRODUITS DE CONSOMMATION.

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

Activity: PARTICIPATION AU SIG GRENOBLE
Expected Results: ACCROISSEMENT DES VENTES D'ARTICLES DE SPORTS.

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

Activity: REPORTAGE SUR LA GRANDE DISTRIBUTION.
Expected Results: MEILLEUR OUTIL DE TRAVAIL POUR LES FIRMES CANADIENNES

Activity: DEVELOPPER LE MARCHÉ DES ACCESS.OE PISCINES ET AQUACENTERS.
Expected Results: MEILLEURE PENETRATION DU MARCHÉ.

Activity: VOIR DEVEL.POSSIBLE DE LA CHAUSSURE D'HIVER CDNNE.
Expected Results: MEILLEURE PENETRATION DU MARCHÉ.

RPTC1 TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM
89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: PARIS

Market: FRANCE

Sector : EDUCATION, MEDICAL, HEALTH PROD

Sub-Sector: EDUCATIONAL SERVICES, EQUIPMENT

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1165.00 \$M	1408.00 \$M	1592.00 \$M	1630.00 \$M
Canadian Exports	7.22 \$M	7.04 \$M	8.60 \$M	10.00 \$M
Canadian Share of Market	0.62 %	0.50 %	0.54 %	0.61 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	28.40 %
GERMANY WEST	21.10 %
JAPAN	10.30 %
UNITED KINGDOM	6.00 %
ITALY	5.90 %
BELGIUM	5.30 %

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

Products/services for which there are good market prospects:

1. APPAREILS DE PROTHESES
2. INSTRUMENTS & APPAREILS DIVERS DE CHIRURGIE & LABO
3. PIECES ET ACCESSOIRES A RAYONS X
4. TUBES A RAYONS X
5. INSTRUMENTS DENTAIRES
6. AUDIOPROTHESES
7. PIECES POUR PROTHESES INTERNES
8. INSTRUMENTS D'OPHTALMOLOGIE
9. CANULES ET CATHETERS
10. RESPIRATEURS A USAGE MEDICAL
11. APPAREILS DE MECANOTHERAPIE ET MASSAGE
12. APPAREILS DE TRANSFUSION

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PARIS

Market: FRANCE

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Import duties are low
- Aggressive marketing
- PEMD support
- Fairs and Missions support

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

Activity: SUIV DE L'ETUDE TERM EN 87 SUR L'INSTRUM MEDICALE & PLUS
Expected Results: LOCALISATION DE DISTRIBUTEURS POUR L'INDUSTRIE CANADIENNE

Activity: IMPLEMENTER LE RESEAU WIN ADEQUATEMENT
Expected Results: MIEUX CONNAITRE LES EXPORTATEURS CANADIENS

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

Activity: BIOEXPO
Expected Results: PROMOUVOIR LA BIOTECHNOLOGIE CANADIENNE EN FRANCE

Activity: IPHARMEX
Expected Results: PROMOUVOIR LA BIOTECHNOLOGIE CANADIENNE EN FRANCE.

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

Activity: RENC SOC FABRIC EN FRANCE DANS LE BUT DE LES AMENER A FABRI
Expected Results: SUBSTITUER LES IMPORTATIONS PAR UNE FABRICATION LOCALE.

Activity: RENCONTRER DES DISTRIBUTEURS
Expected Results: MIEUX VENDRE NOS PRODUITS

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: PARIS

Market: FRANCE

Sector : INDUSTRIAL MACHIN, PLANTS, SERV.

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	8622.00 \$M	13090.00 \$M	13930.00 \$M	15000.00 \$M
Canadian Exports	86.40 \$M	129.20 \$M	138.00 \$M	150.00 \$M
Canadian Share of Market	1.00 %	0.99 %	0.99 %	1.00 %

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

Major Competing Countries

Market Share

GERMANY WEST	26.10 %
ITALY	13.20 %
UNITED KINGDOM	6.80 %
JAPAN	6.30 %
BELGIUM	5.60 %
SWITZERLAND	3.20 %

Current Status of Canadian

exports in this sector/subsector: Mature with little growth

Products/services for which there are good market prospects:

1. TURBO PROPULSEURS POUR AERONEFS CIVILS
2. APPAREILS, DISPOSITIFS POUR LIQUEFACTION DE L'AIR
3. PELLETEUSES, RAMASSEUSES MECANIQUES
4. DETENDEURS ET PARTIES
5. ARBRES DE TRANSMISSION, VILBREQUIRS, ENGRENAGES, EMB.
6. MATERIEL EXTRACTION
7. PIECES DETACHES D'OUTILS & MACH.-OUTILS POUR TRAV.
8. PART./PIECES DETACHEES POUR MACH. DE SONDAGE & FORA
9. MACH & APP. AUTO. SUR CHENILLES/ROUES/PAS SUR RAILS

Factors contributing to current successful Canadian exports:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PARIS

Market: FRANCE

Factors for Canadian exports not reaching market potential:

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

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

Activity: MISE A JOUR DE FICHES "EXPORTATEURS" + MINI-ETUDE DE MARCHÉ
Expected Results: MEILLEURE APPREC. DU NIVEAU TECHN. EXISTANT, & IDENTIFICATION DES OPP. PERMETTANT L'EXPANSION DES VENTES DE MATERIEL.

Activity: COOP ETROITE AVEC LE DELEGUE AUX TRANSF. DE TECHN. (PROG. TDD)
Expected Results: APPROCHE DIRECTE DES SOCIETES DETENTRICES OU ACQUEREUSES DE TECHNOLOGIE.

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

Activity: ENCOURAGEMENT DE VISITES D'EXPORTATEURS CDNS SOUS PROG. PEMD
Expected Results: RENFORCEMENT DES POSITIONS CANADIENNES ET ETABLISSEMENT DU SUIVI DES VENTES A MOYEN ET LONG TERME.

Activity: ETUDE COMPAR. DES POSS. CDNNES TELLES QUE DECRITES PAR LES DEL
Expected Results: PERMETTRE AUX FABRICANTS CANADIENS DE CONCURRENCER DIRECTEMENT DANS UN SECT. QUI LEUR EST RESTE JUSQU'ICI PEU ACCESSIB.

Activity: IMPACT DU MARCHÉ UNIQUE 93 SUR SECTEUR: ETUDE, ANALYSE
Expected Results: EVALUATION ACTUALISEE DE LA SPECIFICITE & DU POTENTIEL DES EQUIPEMENTS CDNS DANS LE CONTEXTE DU MARCHÉ UNIQUE.

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: PARIS

Market: FRANCE

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

PROJET DE SOUS-MARINS NUCLEAI- Approximate Value: 8 M\$
RES Financing Source :
Contact :

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: PARIS

Country: FRANCE

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

	Total (\$ Million)	Canadian Share	Major Competitor Share
Current year	4000.00	2.10	42.50
One year ago	7400.00	2.30	45.90
Two years ago	0.00	0.00	0.00

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

L'AN DERNIER DES INVSTMTS FRANC. AU CAN S'ELEVAIENT 9.7 MLDS DE FRANCS (\$2 MLDS) & REPRES 2.3% DE L'ENSEMBE DES INVSTMT FRANC. A L'ETRANGER. COMPTE TENU DE NOTRE EFFORT DE PROMO'N DS LE CADRE DU PROG DE DEV DES INVEST. & DE L'EVENEMENT DE L'ACCORD DE LIBR ECH. NS DEVRIONS POUVOIR ATTEINDRE 2.5-2.7%

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

- ETATS-UNIS
- SUISSE
- ROYAUME UNI
- ITALIE
- PAYS-BAS
- ALLEMAGNE

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

- PROSPECTION (VISITES A LA SOCIETE)
- PROMOTION (JOURNEES ECONOMIQUES/SEMINAIRES)
- JUMELAGE (REGIONS)
- MISSIONS DE COOPERATION INDUSTRIELLE

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RPTDL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: PARIS

Country: FRANCE

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

- PORTE D'ENTREE SUR LE MARCHE DES ETATS-UNIS - ACCORD DE
- PORTE D'ENTREE SUR LE MARCHE DES ETATS-UNIS - ACCORD DE
- COÛTS D'IMPLANTATION MOINS ÉLEVÉS PAR RAPPORT AUX
- COÛTS D'IMPLANTATION MOINS ÉLEVÉS PAR RAPPORT AUX
- LES MARCHÉS ET LES BÉNÉFICES.
- PRODUCTION INDUSTRIELLE DIVERSIFIÉE/INNOVATIONS
- PRODUCTION INDUSTRIELLE DIVERSIFIÉE/INNOVATIONS
- STABILITÉ/CONDITIONS ÉCONOMIQUES. QUALITÉ DE LA VIE.

the following constraints:

- RECENTRALISATION ACTIVITÉS SUR MARCHÉ EUROPÉEN DANS CADRE
- RECENTRALISATION ACTIVITÉS SUR MARCHÉ EUROPÉEN DANS CADRE
- OMNIBUS PAR MARCHÉ DES ETATS-UNIS (GREAT AMERICAN DREAM)
- MÉCONNAISSANCE DU MARCHÉ CANADIEN (OPPORTUNITÉS/AVANTAGES/
- MÉCONNAISSANCE DU MARCHÉ CANADIEN (OPPORTUNITÉS/AVANTAGES/
- PERCEPTION CLIMAT INVESTISSEMENT (ON SE SOUVIENT ENCORE DE
- PERCEPTION CLIMAT INVESTISSEMENT (ON SE SOUVIENT ENCORE DE
- MAUVAISE IMAGE INVESTISSEURS FRANÇAIS AUPRÈS SPÉCIALISTES
- MAUVAISE IMAGE INVESTISSEURS FRANÇAIS AUPRÈS SPÉCIALISTES
- MAUVAISE IMAGE INVESTISSEURS FRANÇAIS AUPRÈS SPÉCIALISTES

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

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

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RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: PARIS

Country: FRANCE

The mission believes that the following sectors are of greatest interest to investors in its territory/country with an assigned ranking of 1-10:

Sector	Ranking
Agriculture/Food/Fish	5
Resource Processing	1
Machinery and Equipment	7
Transportation	6
Consumer Products	10
Commercial Service	4
Computer and Communications	9
Health Care Products/Medical	8
Aerospace and Defence	2
Strategic Technologies	3

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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: PARIS

Country: FRANCE

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

Date

Type: MISSION OUT, MINISTERIAL

VISITE MINISTRE INDUSTRIE, SCIENCE, TECHNOLOGIE

11/89

Location: PARIS/LYON TOULOUSE

Invest Nature: VARIOUS

Sector: AGRI & FOOD PRODUCTS & SERVICE

Cooperants: 8.3.3

Estimated Budget: \$5,000.00

Type: MISSION OUT, INDUSTRY

MISSION/SALON INT'L COMPOSANTS ELECTRONIQUES PARIS NOV 89.

10/89

Location: PARIS, LYON

Invest Nature: VARIOUS

Sector: POWER & ENERGY EQUIP. & SERV.

Cooperants: 8.3.3

Estimated Budget: \$15,000.00

Type: SEMINAR, ABROAD

SEMINAIRE/JOURNEES ECONOMIQUES CIBLES

4/89

Location: TOULOUSE/LYON

Invest Nature: PORTFOLIO

TECHN LICENSING

Sector: AGRI & FOOD PRODUCTS & SERVICE

Cooperants: 8.3.3

Estimated Budget: \$16,000.00

Type: ENTREPRENURIAL SEMINAR

MAILING/SEMINAIRE CADRE PROJ. IMMIGRANT INVESTISSEUR

9/89

Location: STRASBOURG LYON/TOUL

Invest Nature: PORTFOLIO

ACQUISITION

GREENFIELD

Sector: AGRI & FOOD PRODUCTS & SERVICE

Cooperants:

Estimated Budget: \$20,000.00

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: PARIS

Country: FRANCE

Date

Type: MISSION IN, TO INDUSTRY

MISSION SENSIBILISATION DECIDEURS ECONOMIQUES/GENS
D'AFFAIRES.

10/89

Location: MTL/TORONTO/WPG

Invest Nature: VARIOUS

Sector: FOREST PRODUCTS,EQUIP,SERVICES

Cooperants: 8.3.3

Estimated Budget: \$20,000.00

Type: DIRECT MAIL CAMPAIGN

MAILING SECTEURS PRIORITAIRES POUR AF 89/90

6/89

Location:

Invest Nature: VARIOUS

Sector: FOREST PRODUCTS,EQUIP,SERVICES

Cooperants: 8.3.3

Estimated Budget: \$15,000.00

Type: OUTCALL PROGRAM

SUIVI DOSSIERS EN COURS/NOUVEAUX DOSSIERS

0/00

Location:

Invest Nature: VARIOUS

Sector: AGRI & FOOD PRODUCTS & SERVICE

Cooperants: 8.3.3

Estimated Budget: \$20,000.00

Type: OTHER PROMOTION

ETUDE DE MARCHE (IDENTIFICATION INVESTISSEURS POTENTIELS/
PROFILS SECTORIELS).

4/89

Location:

Invest Nature: VARIOUS

Sector: FOREST PRODUCTS,EQUIP,SERVICES

Cooperants:

Estimated Budget: \$15,000.00

VISITE PRESIDENT INVESTISSEMENT CANADA

2/90

Location: PARIS/LYON

Invest Nature: PORTFOLIO

TECHN LICENSING

Sector: AGRI & FOOD PRODUCTS & SERVICE

Cooperants: 8.3.3

Estimated Budget: \$3,000.00

29/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTDZ

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: PARIS

Country: FRANCE

Date

Type: OTHER PROMOTION

VISITES JOURNALISTES ECONOMIQUES

6/89

Location:

Invest Nature: PORTFOLIO

TECHN LICENSING

Sector: AGRI & FOOD PRODUCTS & SERVICE

Cooperants:

Estimated Budget: \$5,000.00

Total estimated budget for all proposals:

\$134,000.00

Post : PARIS

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Post/Contact</u>
89/04/00	SEAFOOD BUYERS TO MARITIMES MISSION IN, TO INDUSTRY	FISHERIES, SEA PRODUCTS & SERV.
89/04/01	MISSION TO INTERNATIONAL FRANCHISING FAIR - FRANCE MISSION OUT, INDUSTRY	SERVICE INDUSTRIES G.COTE/D.ADAMS
89/04/01	INT'L. FRANCHISING FAIR, PARIS INFO BOOTH, ONLY	GENERAL OR UNASSIGNED ISB G.COTE/D.ADAMS
89/04/17	COMPUTER MISSION TO PARIS/ SICOB MISSION OUT, INDUSTRY	ADVANCED TECH. PROD. & SERV
89/05/21	BIOTECHNOLOGY MISSION TO FRANCE MISSION OUT, INDUSTRY	EDUCATION, MEDICAL, HEALTH PROD D.ADAMS/G/COTE
89/05/23	BIO-EXPO, PARIS, FRANCE FAIR, NATIONAL STAND	EDUCATION, MEDICAL, HEALTH PROD D.ADAMS/G.COTE
89/06/08	PARIS AIR SHOW '89, LE BOURGET (PARIS), FRANCE FAIR, NATIONAL STAND	TRANSPORT SYS, EQUIP, COMP, SERV. Y.BEDARD/L.CAMERON
89/09/26	INFURA TELECOM, LYONS, FRANCE INFO BOOTH, ONLY	ADVANCED TECH. PROD. & SERV G.COTE/S.WATERFALL
89/10/00	MEDICAL/PHARMACEUTICAL MISS. TO IPHARMEX, FRANCE (LYON) MISSION OUT, INDUSTRY	EDUCATION, MEDICAL, HEALTH PROD
89/10/00	INFORMATION TECHNOLOGIES BUYERS MISSION FROM FRANCE MISSION IN, TO INDUSTRY	ADVANCED TECH. PROD. & SERV

Post : PARIS

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Post/Contact</u>
89/10/20	EQUIP'AUTO, PARIS,FRANCE INFO BOOTH, ONLY	TRANSPORT SYS,EQUIP,COMP,SERV. G.COTE/S.WATERFALL
89/11/07	BATIMAT - BUILDING MAT'L SHOW PARIS,FRANCE FAIR, NATIONAL STAND	CONSTRUCTION INDUSTRY G.COTE/D.ADAMS
90/02/00	SECURITY EQUIP. BUYERS MISSION FROM FRANCE MISSION IN, TO INDUSTRY	ADVANCED TECH. PROD. & SERV
90/03/00	SIA (AGRICULTURAL),PARIS, FRANCE FAIR, NATIONAL STAND	AGRI & FOOD PRODUCTS & SERVICE G.COTE/H.SCHRDETER
90/03/00	SPECIALTY FOOD BUYERS FROM FRANCE MISSION IN, TO INDUSTRY	AGRI & FOOD PRODUCTS & SERVICE

RPTBL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: ROME

Country: ITALY

ITALY

THE ITALIAN ECONOMY, WITH GNP GROWTH FORECAST OF MORE THAN 3 PERCENT, SHOULD REMAIN AMONGST THE STRONGEST AND MOST DYNAMIC OF THE EUROPEAN COMMUNITY IN 1989. INFLATION, A MAJOR CONCERN IN THE EARLY EIGHTIES, HAS REMAINED UNDER 5 PERCENT AND IT IS NOT EXPECTED TO EXCEED THAT LEVEL IN 1989. THE COUNTRY'S NUMBER ONE ECONOMIC PROBLEM IS THEREFORE THE PUBLIC DEFICIT WHICH THE CURRENT GOVERNMENT SEEMS DETERMINED TO BRING UNDER CONTROL. WHILE THIS MAY LEAD TO SLOWER GROWTH IN PUBLIC CONSUMPTION, DEMAND IS EXPECTED TO REMAIN HIGH IN 1989 AND IN PARTICULAR IMPORTS WILL CONTINUE TO GROW (+6.4 PERCENT), NOT ONLY AT A HIGHER RATE THAN EXPORTS (+4.5 PERCENT), BUT ALSO AT A HIGHER RATE THAN DOMESTIC DEMAND (+3.5 PERCENT). PROSPECTS FOR CANADIAN EXPORTS IN 1989 ARE THEREFORE EXCELLENT AND CANADIAN INDUSTRY SHOULD BE WELL POSITIONED TO TAKE ADVANTAGE OF THE OPPORTUNITIES OFFERED BY THE ECONOMIC AND INDUSTRIAL CO-OPERATION AGREEMENT SIGNED BY CANADA AND ITALY IN 1988. GREATER INTEREST BY ITALIAN INVESTORS TO CONSIDER OPPORTUNITIES ABROAD SHOULD ALSO ARISE FROM THE FURTHER LIBERALIZATION OF CAPITAL MOVEMENTS IN THE PERSPECTIVE OF THE EC SINGLE MARKET IN 1992.

MALTA

AS IT MOVES INTO ITS SECOND YEAR IN POWER, THE MALTESE NATIONALIST GOVERNMENT CONTINUES TO EXPLORE WAYS OF STRENGTHENING THE NATIONAL ECONOMY, REDUCING THE ROLE OF THE PUBLIC SECTOR IN THE MARKET, AND ENSURING A GENUINELY NON-ALLIGNED POSITION IN THE GLOBAL AND ECONOMIC SCENE. VARIOUS LARGE SCALE VENTURES ARE IN THE PLANNING OR IMPLEMENTATION STAGES, INCLUDING CONSTRUCTION OF A MAJOR POWER PLANT AND A STUDY OF THE MALTESE POTENTIAL AS AN OFFSHORE BANKING CENTRE.

LIBYA

OUR ACTIVITIES WITH RESPECT TO LIBYA WILL CONTINUE TO BE LIMITED TO THE PROVISION OF AVAILABLE MARKET INTELLIGENCE ON A RESPONSIVE BASIS.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 EXPORT PROMOTION PRIORITIES

Mission: ROME

Country: ITALY

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

1. ADVANCED TECH. PROD. & SERV
ITALIAN MARKET IS DEVELOPING FOR TELECOM, SATELLITE/SPACE SYSTEMS, ENVIRONMENTAL AND OTHER SPECIALIZED ELECTRONIC EQUIPMENT, PRODUCING SIGNIFICANT OPPORTUNITIES FOR INDUSTRIAL COOP, TECHNOLOGY TRANSFERS AND EXPORT SALES. SECTOR ALSO IMPORTANT IN CONTENT OF EC 1992 MARKET INTEGRATION.
2. DEFENCE PROGRAMS, PRODUCTS, SERV
REACTIVATED RDP COMMITTEE, COMBINED WITH RECENT ITALIAN DEFENCE CONTRACT IN CANADA, ARE PROVIDING AN IMPETUS TO DEFENCE TRADE BETWEEN THE TWO COUNTRIES AND PARTICULARLY FOR CANADIAN FIRMS SEEKING OPPORTUNITIES IN ITALY.
3. AGRI & FOOD PRODUCTS & SERVICE
HIGH EC AGRICULTURAL SUPPORT SUBSIDIES AND HARMONIZATION OF EC PLANT HEALTH AND VETERINARY REGULATIONS TEND TO RESTRICT MARKET ACCESS, NECESSITATING CONSTANT LIAISON WITH AND REPRESENTATIONS TO ITALIAN AUTHORITIES AS WELL AS PROMOTIONAL EFFORTS TO MAINTAIN AND INCREASE TRADITIONAL AND NEW NICHE MARKETS.
4. FISHERIES, SEA PRODUCTS & SERV.
ITALIAN FISH MARKET IS OPENING UP TO NON-MEDITERRANEAN SPECIES AND CANADIAN EXPORTERS HAVE BEGUN TO EXPLOIT NEW OPPORTUNITIES. FURTHER MARKET DEVELOPMENT WILL REQUIRE PROMOTIONAL EFFORTS AND GOVERNMENT REPRESENTATIONS TO IMPROVE MARKET ACCESS.
5. TRANSPORT SYS, EQUIP, COMP, SERV.
MAJOR MARKET FOR AIRCRAFT (CL-215, CHALLENGER, DASH-8), AIRCRAFT ENGINES AND PARTS, REQUIRING SUSTAINED MARKET INTELLIGENCE GATHERING AND LIAISON WITH AND REPRESENTATIONS TO ITALIAN GOVERNMENT AUTHORITIES.

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

1. FOREST PRODUCTS, EQUIP, SERVICES
2. MINE, METAL, MINERAL PROD & SRV
3. TRANSPORT SYS, EQUIP, COMP, SERV.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ROME

Market: ITALY

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	23000.00 \$M	24000.00 \$M	24000.00 \$M	25000.00 \$M
Canadian Exports	48.00 \$M	50.00 \$M	50.00 \$M	50.00 \$M
Canadian Share of Market	0.20 %	0.21 %	0.21 %	0.20 %

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

Major Competing Countries Market Share

FRANCE	15.00 %
GERMANY WEST	12.00 %
UNITED STATES OF AMERICA	10.00 %
UNITED KINGDOM	8.00 %
NETHERLANDS	7.00 %

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

Products/services for which there are good market prospects:

1. HORSEMEAT
2. PULSES
3. SEEDS

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Canada is one of few sources of supply

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ROME

Market: ITALY

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Import duties are high
- Restrictive standards
- Limited appreciation/understanding of distribution system
- Limited Canadian capabilities
- VET. AND PLANT
- HEALTH REGS.

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

Activity: NEED FOR MULTI-YR DEROGATION FM EEC TO EXPORT SEED POTATOES
Expected Results: STABILIZE MARKET PRESENCE AND INTRODUCE NEW VARIETIES

Activity: RENOV OF PLANT HEALTH & VET. REQUI IN VIEW OF ONGOING HARMON
Expected Results: MAINTAIN MARKET ACCESS FOR CATTLE, SEMEN, SEEDS, MEAT ETC.

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

Activity: SUPPORT CDN IND MKTG INIT THROUGH REPRES TO CLIENTS & GOVT
Expected Results: INCREASED SALES IN NICHE MARKETS OF GOOD POTENTIAL.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: RDME

Market: ITALY

Sector : FISHERIES, SEA PRODUCTS & SERV.

Sub-Sector: FISH & SHELLFISH & OTHER PROD

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1200.00 \$M	1000.00 \$M	1200.00 \$M	1400.00 \$M
Canadian Exports	11.00 \$M	14.00 \$M	15.00 \$M	17.00 \$M
Canadian Share of Market	0.90 %	1.00 %	1.40 %	1.40 %

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

Major Competing Countries	Market Share
NETHERLANDS	15.00 %
DENMARK	12.00 %
ARGENTINA	5.00 %
FRANCE	13.00 %
SPAIN	8.00 %
PANAMA	4.00 %

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

Products/services for which there are good market prospects:

1. FROZEN SALMON
2. LIVE LOBSTER
3. LIVE CLAMS

Factors contributing to current successful Canadian exports:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ROME

Market: ITALY

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Unsuitable product
- FAILURE TO ADAPT PRODUCT & PACKAGING TO MARKET REQUIREMENTS

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

Activity: OBTAIN IT GOVT AUTHORITY FOR IMPORT OF OTHER SHELL FISH
Expected Results: EXPORT AUTHORIZATION

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

Activity: CREATE DATA BASE OF LOCAL IMPORTERS/DISTRIBUTORS
Expected Results: MORE RAPID & DIRECT DISTRIBUTION OF OFFERS/INFO TO LOCAL IMPORTERS

Activity: EXPAND & UPDATE SERIES OF SPECIES/PROD REPORTS & SUMMARY OF
Expected Results: BUILD HIGHER PROFILE FOR ITALY-CDN FISH TRADE IN BOTH COUNTRIES

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ROME

Market: ITALY

Sector : FISHERIES, SEA PRODUCTS & SERV.

Sub-Sector: PROCESSED FISH & SHELLFISH

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	468.00 \$M	450.00 \$M	450.00 \$M	440.00 \$M
Canadian Exports	10.00 \$M	12.50 \$M	14.00 \$M	15.00 \$M
Canadian Share of Market	2.10 %	2.80 %	3.10 %	3.40 %

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

Major Competing Countries

Market Share

NORWAY	15.00 %
DENMARK	12.00 %
ICELAND	8.00 %
SPAIN	6.00 %
PORTUGAL	5.00 %
FRANCE	4.00 %

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

Products/services for which there are good market prospects:

1. SMOKED SALMON
2. SALTED COD
3. CANNED SALMON

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- PEMD support
- Fairs and Missions support
- Competitive pricing
- Canada is one of few sources of supply

Factors for Canadian exports not reaching market potential:

- Unsuitable product
- LACK OF CONSISTENT INTEREST ON PART
OF CANADIAN FIRMS

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: RUME

Market: ITALY

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

Activity: SMOKED SALMON PROM, POSS IN CONJ W/OUTGOING MISS OF SMOK.SALM
Expected Results: ESTABLISH 3 OR 4 AGENCY AGREEMENTS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ROME

Market: ITALY

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	400.00 \$M	500.00 \$M	550.00 \$M	550.00 \$M
Canadian Exports	25.00 \$M	30.00 \$M	35.00 \$M	35.00 \$M
Canadian Share of Market	6.25 %	6.00 %	6.36 %	6.36 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	70.00 %
GERMANY WEST	10.00 %

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

Products/services for which there are good market prospects:

1. AIRCRAFT ENGINES AND PARTS
2. AIRCRAFT SIMULATORS
3. COMMUNICATIONS AND NAVIGATION EQUIPMENT

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- CDN IND TECHNOLOGICAL
- LEAD IN ENGINES AND SIMU-
- LATORS

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- GOVERNMENT PROCURE-
- MENT OILICIES
- GOVT PROCUREMENT POLICIES & STRONG
- ITALIAN & OTHER COMPETITION

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ROME

Market: ITALY

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

Activity: FOLLOW UP TO RE-ACTIVATED CANADA-ITALY RDP COMM. MEETING
Expected Results: OBTAINING OF CONTRACTS BY CANADIAN COMPANIES

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

Activity: IDENT OF EXPORT OPPORT RELATED TO MAJOR CDN & ITALIAN ACQUIS
Expected Results: INCREASED TRADE AND INDUSTRIAL COOP.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ROME

Market: ITALY

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	10300.00 \$M	11300.00 \$M	11500.00 \$M	13000.00 \$M
Canadian Exports	10.00 \$M	9.00 \$M	10.30 \$M	13.00 \$M
Canadian Share of Market	1.00 %	0.80 %	0.90 %	1.00 %

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

Major Competing Countries	Market Share
ITALY	25.00 %
GERMANY WEST	20.00 %
UNITED STATES OF AMERICA	15.00 %
JAPAN	10.00 %
UNITED KINGDOM	8.00 %
FRANCE	6.00 %

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

Products/services for which there are good market prospects:

1. SPACE AND REMOTE SENSING
2. MODEMS/TERMINALS
3. ATC/AVIONICS
4. ENVIRONMENTAL EQUIPMENT AND SERVICES
5. COMPUTER SOFTWARE

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- PEMD support
- willingness of exporters to invest/joint venture in territory

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ROME

Market: ITALY

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Restrictive standards
- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored
- GOVERNMENT PROCURE-
- MENT PRACTICES

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

Activity: PURSUE MKT OPPORT FOR ATC INSTRUM & EQPT IN CONJ W/OUTG.MISS
Expected Results: INCREASED TRADE AND INDUSTRIAL CO-OPERATION

Activity: UNDERTAKE MARKET SURVEY ENVIRONMENTAL PRODUCTS & SERVICES
Expected Results: IDENTIFICATION MARKET OPPORTUNITIES IN THIS SECTOR

Activity: PURSUE MKT OPPORT FOR SPACE & REMOTE SENSING INSTRUM IN CONJ
Expected Results: INCREASED TRADE AND INDUSTRIAL CO-OPERATION

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ROME

Market: ITALY

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: AERUSPACE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	959.00 \$M	540.00 \$M	600.00 \$M	700.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.00 \$M	20.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	2.80 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	75.00 %
UNITED KINGDOM	9.00 %
FRANCE	5.00 %

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

Products/services for which there are good market prospects:

1. WATER-BUMBERS
2. COMMUTER AIRCRAFT
3. EXECUTIVE JET AIRCRAFT

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- Trade Fair activity
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- Competitive Canadian financing

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Restrictive standards
- GOVT PROCUREMENT
- PRACTICES
- GOVERNMENT PROCUREMENT PRACTICES

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ROME

Market: ITALY

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

Activity: FOLLOW UP ON REPRES TO ITALIAN AUTHO RE ACQUIS OF FIRE-FIGHT
Expected Results: SALE OF TWO ADDITIONAL CL-215

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

Activity: MONITOR PRDG OF NEGO FOR CDA-ITALY AIRWORTHINESS CERT AGREEM
Expected Results: REMOVAL OF IMPEDIMENT TO TRADE IN THIS SECTOR

Activity: SUPP CDN IND MKTG INIT THROUGH REPRES TO CLIENT & GOVT AUTHO
Expected Results: INCREASE SALES OF COMPLETE AIRCRAFT

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: ROME

Country: ITALY

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

	Total (\$ Million)	Canadian Share	Major Competitor Share
Current year	34900.00	1.00	12.00
One year ago	37300.00	1.00	11.00
Two years ago	40000.00	1.00	12.00

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

POST CURRENTLY HANDLING SEVERAL INVESTMENT FILES WHICH OVER LONGER TERM COULD REPRESENT MORE THAN \$1 BILLION IN DIRECT INVESTMENT IN CDA BY ITALIAN STATE HOLDING CO. OR THEIR SUBSIDIARIES. IT IS REASONABLE TO EXPECT THAT \$50M OF THIS AMOUNT COULD MATERIALIZE IN 1989-90 - INVESTMENT FLOW \$450M.

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

- EEC
- UNITED STATES
- BRASIL
- ARGENTINA

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

- INVESTMENT PROSPECTING BY LOCAL GOVERNMENT REPRESENTATIVES
- HIGH LEVEL VISITS OF HEADS OF GOVERNMENT AND MINISTERS
- INCOMING VISIT PROGRAMS FRD SENIOR EXECUTIVES OF ITALIAN STATE HOLDING COMPANIES

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RPTDL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: ROME

Country: ITALY

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

- GOVERNMENT INCENTIVE PROGRAM
- PROXIMITY OF USA MARKET
- AVAILABILITY AND LOW COST OF ENERGY. LOW INDIRECT LABOUR
- AVAILABILITY AND LOW COST OF ENERGY. LOW INDIRECT LABOUR

the following constraints:

- LACK OF KNOWLEDGE AND INFO ON INVESTMENT OPPORTUNITIES
- MARKET SIZE
- DISTANCE (FROM ITALY)

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

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

The mission believes that the following sectors are of greatest interest to investors in its territory/country with an assigned ranking of 1-10:

Sector	Ranking
Agriculture/Food/Fish	8
Resource Processing	1
Machinery and Equipment	4
Transportation	2
Consumer Products	5
Commercial Service	9
Computer and Communications	6
Health Care Products/Medical	10
Aerospace and Defence	3
Strategic Technologies	7

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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: ROME

Country: ITALY

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

	Date
Type: MISSION OUT, MINISTERIAL	
VISIT BY PROVINCIAL MINISTER	4/89
Location: ROME	
Invest Nature: GREENFIELD ACQUISITION	
Sector: OIL & GAS EQUIPMENT, SERVICES	
Cooperants: PROVINCE, INVESTMENT CDA, ISTC	
Estimated Budget: \$3,000.00	
VISIT BY ISTC MINISTER TO ITALY	6/89
Location: ROME	
Invest Nature: GREENFIELD ACQUISITION STRAT. PARTNER	
Sector: MULTIPLE SECTORS	
Cooperants: ISTC INVESTMENT CANADA	
Estimated Budget: \$3,000.00	
Type: MISSION OUT, INDUSTRY	
ENI/ISTC WORKING GROUP MEETING	6/89
Location: ROME	
Invest Nature: GREENFIELD ACQUISITION	
Sector: OIL & GAS EQUIPMENT, SERVICES	
Cooperants: ISTC, INVESTMENT CDA	
Estimated Budget: \$1,000.00	
Type: SEMINAR, ABROAD	
INVESTMENT SEMINAR IN CO-OPERATION WITH CONFINDUSTRIA	1/90
Location: ROME	
Invest Nature: VARIOUS	
Sector: MULTIPLE SECTORS	
Cooperants: INVESTMENT CDA, ISTC	
Estimated Budget: \$4,000.00	

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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: ROME

Country: ITALY

Date

Type: MISSION IN, TO INDUSTRY

VISIT OF SENIOR MANAGEMENT OF EFIM AND SUBSIDIARIES

5/89

Location: OTTAWA, MONTREAL, T.O

Invest Nature: GREENFIELD

ACQUISITION

Sector: OIL & GAS EQUIPMENT, SERVICES

Cooperants: INVESTMENT CDA, ISTC, PROVINCES

Estimated Budget: \$3,500.00

VISIT OF SENIOR MANAGEMENT OF IRI AND SUBSIDIARIES

10/89

Location: OTTAWA, MTL, TORONTO

Invest Nature: GREENFIELD

JOINT VENTURES

Sector: DEFENCE PROGRAMS, PRODUCTS, SERV

Cooperants: INVESTMENT CDA, ISTC, PROVINCES

Estimated Budget: \$3,500.00

Total estimated budget for all proposals:

\$18,000.00

89/06/12 RP-A10 PEMD - Government Initiated Activities 1989 392A)

Post : ROME

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Post/Contact</u>
89/09/00	FISHERY INSPECTORS FROM ITALY TO EAST COAST MISSION IN, ACCESS	FISHERIES, SEA PRODUCTS & SERV.

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: MILAN

Country: ITALY

THE CONSULATE GENERAL IN MILAN HAS RESPONSIBILITY FOR THE EIGHT NORTHERN REGIONS OF ITALY WHERE IS LOCATED MOST OF THE PRIVATE SECTOR OF THIS COUNTRY AND MANY OF THE OPERATIONAL ARMS OF STATE-OWNED COMPANIES WHICH ALTOGETHER REPRESENT NEARLY 80% OF ECONOMIC OUTPUT OF ITALY. THE PRIVATE SECTOR IS THE ECONOMIC BACKBONE OF ITALY, ITS STRENGTH COMING FROM THE POWERFUL ENTREPRENEURIAL SPIRIT WHICH HAS BEEN STIMULATING THE CREATION OF THOUSANDS OF SMALL BUSINESSES IN VIRTUALLY EVERY MANUFACTURING AND SERVICE SECTOR. THE FAVORABLE ECONOMIC SITUATION EXPERIENCED SINCE 1983 WAS FULLY TAKEN ADVANTAGE OF BY BUSINESS AND FINANCIAL INSTITUTIONS TO RESTRUCTURE AND CREATE THE CONDITIONS WHICH LED TO ITALY'S OVERCOMING THE U.K. AS THE FIFTH INDUSTRIAL POWER. SMALL AND MEDIUM SIZE BUSINESSES CONTINUE TO SEEK TO MODERNIZE THEIR MANUFACTURING FACILITIES THROUGH AUTOMATION, USE OF INFORMATICS AND UP TO DATE PROCESSING TECHNOLOGIES SPURRING LOCAL TECHNOLOGICAL INNOVATION, INCREASED PRODUCTION AND INCREASED OUTPUT WHICH HAS ALLOWED ITALIAN PRODUCTS TO BECOME MORE COMPETITIVE PRICewise WHILE MAINTAINING HIGH QUALITY AND DESIGN STANDARDS AS MAJOR SELLING POINT IN AND OUTSIDE ITALY. INGENUITY, FLEXIBILITY, CUSTOMIZATION FORM THE BASIS OF AN INCREASINGLY MORE INTERNATIONAL MENTALITY WHICH IS CONSIDERED BY ITALIAN BUSINESSMEN AS ESSENTIAL TO MEET THE CHALLENGES POSED BY THE UPCOMING EEC INTEGRATION OF 1992. WHILE THE ITALIAN REALITY REMAINS CONDUCIVE TO CONTINUE CONCENTRATION OF CDN DIRECT SALES IN COMMODITIES (PULP, METALS/MINERALS, WHEAT), THE POTENTIAL FOR INCREMENTAL BUSINESS LINKS BETWEEN CANADA AND ITALY APPEARS TO RESIDE IN TAPPING THE VAST NETWORK OF SME'S IN HIGH TECHNOLOGY ACTIVITIES SUCH AS PRECISION ENGINEERING, ROBOTICS, ARTIFICIAL INTELLIGENCE, BIOTECHNOLOGY, CAD/CAM/CAE, FLEXIBLE MANUFACTURING, ETC. THESE SUB-SECTORS OFFER OPPORTUNITIES NOT ONLY FOR CDN SUPPLIERS TO SELL HIGHLY SPECIALIZED PRODUCTS/SERVICES BUT ALSO FOR CDA TO ATTRACT THIS NEW GENERATION OF SUCCESSFUL SMALL BUSINESS ENTREPRENEURS THROUGH INVESTMENTS, JOINT-VENTURES, LICENSING AND OTHER FORMS OF COOPERATION AT ACADEMIC, R&D AND PRODUCTION LEVELS SO AS TO INSTILL IN CDA A SIMILAR INNOVATIVE SPIRIT WHICH CAN HELP US TO MEET OUR OWN CHALLENGES IN N.A. AND THE REST OF THE WORLD. NOTWITHSTANDING TWO PERENNIAL ECONOMIC PROBLEMS OF ITALY, NAMELY PUBLIC SECTOR DEFICIT (IN EXCESS OF 10% OF GNP PER YEAR) AND HIGH OFFICIAL UNEMPLOYMENT (14%) ECONOMIC GROWTH CONTINUES UNABATED (3-4%) LED BY CONSUMER DEMAND AND INVESTMENTS; INDUSTRIAL PRODUCTION GROWTH (5-6%) IS HIGHEST IN DECADE AND OUTPACES MOST EEC COUNTRIES RATIONALIZATION OF INDUSTRY, MORE INTENSIVE USE OF LABOUR AND AUTOMATION HAS MEANT CONTINUED PRODUCTIVITY INCREASES AND IN 1988 LIKELY SIGNIFICANT IMPROVEMENTS IN NEGATIVE TRADE BALANCE (LED BY EXPORTS). INFLATION REMAINS UNDER 5%. ECONOMIC INTEGRATION WITH EEC FOR 1992 IS MOTIVATING LARGE/ MEDIUM SIZE GROUPS TO RE-EXAMINE AND RE-ALIGN THEIR POSITIONS VIS-A-VIS EUROPE AND ELSEWHERE. ALL IN ALL, THEREFORE, IT LOOKS LIKE ECONOMIC ENVIRONMENT NEXT YEAR WILL CONTINUE TO BE VERY CONDUCIVE TO REALIZATION OF POST'S PLANS AND OBJECTIVES.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 EXPORT PROMOTION PRIORITIES

Mission: MILAN

Country: ITALY

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

1. **ADVANCED TECH. PROD. & SERV**
BETWEEN 1982-87 INVESTMENT SPENDING BY 1200 LARGEST ITALIAN COYS INCR. BY 75% INCREASING TOTAL VALUE ADDED BY THESE FIRMS BY OVER 100% WHILE REDUCING EMPL. BY ABOUT 17%. THESE NUMBERS CLEARLY DEMONSTRATE A "HOT" MKT FOR ALL PRODUCTIVITY ENHANCING PROD., SERVICES & HIGH TECH. INCLUDING INFORMATICS, AUTOMATION, PROCESS CONTROLS, ROBOTICS, ETC.
2. **FOREST PRODUCTS,EQUIP,SERVICES**
ITALY IS THIRD LARGEST LUMBER IMPORTING COUNTRY IN THE WORLD. CANADA'S MKT SHARE IS STILL SMALL AND GROWTH POTENTIAL IS SUBSTANTIAL. EXTERNAL CONDITIONS (EG. CDN DOLLAR VALUE) ARE ALSO GOOD. MARKET TRENDS FAVOUR HIGHER VALUE ADDED PRODUCTS WHICH IS IN LINE WITH CDN EXPORT POLICIES.
3. **AGRI & FOOD PRODUCTS & SERVICE**
AS A MAJOR IMPURTER OF AGRICULTURAL, RAW & SEMI-PROCESSED FOOD PROD, & LIVE ANIMALS, THERE IS A WIDE RANGE OF OPPORT FOR CDN EXPORTS INCLUDING MEAT PROD., SEEDS, SPECIALTY FOODS, BEVERAGES,FUR SKINS, SEMEN, ETC. ITALIAN FOOD PROCESSING TECHNOLOGY IS VERY ADVANCED & OFFERS LOTS OF OPPORTUNITIES FOR TECHNOLOGY TRANSFER.
4. **FISHERIES,SEA PRODUCTS & SERV.**
AS ONE OF LARGEST FISH & FISH PRODUCTS IMPURTING NATIONS, ITALY'S POTENTIAL FOR CDN EXPORTERS IS ENORMOUS BUT ALSO DEMANDING FROM HEALTH QUALITY,PRICE & PACKAGING PERSPECTIVES; AGGRESSIVE MKTING, COMMITMENT TO THE MKT & GOOD DEL. TERMS CAN ENSURE A SUBSTANTIAL SHARE OF THE MKT TO INTERESTED CDN EXPORTERS.
5. **EDUCATION,MEDICAL,HEALTH PROD**
ITALY IMPORTS NEARLY 80% OF ITS HEALTH CARE/PHARMACEUTICAL PRODUCTS NEEDS AND BIOTECHNOLOGY IS A FAST GROWING SECTOR OF ACTIVITY. HIGH QUALITY, COMPETITIVELY-PRICED PRODUCTS CAN SELL WELL IN THIS MARKET. SUBSTANTIAL INCREASE IN INQUIRIES REFLECTS NEED FOR SYSTEMATIC APPROACH.

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

- | | |
|-----------------------------------|-----------------------------------|
| 1. FOREST PRODUCTS,EQUIP,SERVICES | 4. ADVANCED TECH. PROD. & SERV |
| 2. MINE,METAL,MINERAL PROD & SRV | 5. AGRI & FOOD PRODUCTS & SERVICE |
| 3. GRAINS AND OILSEEDS | 6. FISHERIES,SEA PRODUCTS & SERV. |

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MILAN

Market: ITALY

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	16822.00 \$M	16724.00 \$M	16306.00 \$M	15900.00 \$M
Canadian Exports	16.00 \$M	23.00 \$M	25.00 \$M	25.00 \$M
Canadian Share of Market	0.10 %	0.14 %	0.15 %	0.16 %

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

Major Competing Countries	Market Share
FRANCE	23.00 %
NETHERLANDS	13.00 %
GERMANY WEST	6.00 %
DENMARK	5.00 %
GREECE	3.00 %
SPAIN	2.00 %

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

Products/services for which there are good market prospects:

1. MEAT (E.G. HORSEMEAT)
2. ANIMALS & SEMEN
3. SEED AND PULSES
4. FEED FERTILIZER (E.G. PEAT-MOSS)
5. BEVERAGES (E.G. WHISKY)
6. HIDES
7. FUR SKINS
8. HONEY
9. MAPLE SYRUP

Factors contributing to current successful Canadian exports:

- PEMD support
- Provincial export promotion
- Competitive pricing
- Strong sectoral capability in Canada

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MILAN

Market: ITALY

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Restrictive quotas
- Non-competitive pricing
- Lack of promotion and advertising
- IMPORT RESTRICTIONS FOR SEED
- POTATOES, MEAT

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

Activity: PARTICIPATION IN FIERAGRICOLA, VERONA
Expected Results: PROMOTION OF AGRICULTURAL PRODUCTS

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

Activity: MAINTAIN & DEV. NEW CONTACTS WITH INDEPENDENT AGENTS
Expected Results: I.D. 5/6 INCREMENTAL AGENCIES SUITABLE TO REP. CDN SUPPLIERS

Activity: REPORT ON ANY MARKET ACCESS/PREFERENCE CHANGES & NEW TRENDS
Expected Results: IMPROVE CDN AWARENESS AND UNDERSTANDING OF ITALIAN FOOD MARKET

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MILAN

Market: ITALY

Sector : FISHERIES, SEA PRODUCTS & SERV.

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1830.00 \$M	2163.00 \$M	2300.00 \$M	2400.00 \$M
Canadian Exports	21.00 \$M	29.00 \$M	32.00 \$M	34.00 \$M
Canadian Share of Market	1.10 %	1.30 %	1.30 %	1.40 %

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

Major Competing Countries

Market Share

NETHERLANDS	15.00 %
FRANCE	14.00 %
DENMARK	11.00 %
SPAIN	8.00 %
ARGENTINA	6.00 %
PANAMA	4.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. SALMON
2. COD
3. LOBSTERS
4. CLAMS
5. GROUND FISH

Factors contributing to current successful Canadian exports:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MILAN

Market: ITALY

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Limited Canadian capabilities

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

Activity: UPDATE REPORT ON FROZEN SALMON MARKET INCL. PREFERR. SPECIES
Expected Results: IMPROVE CDN UNDERSTANDING OF SOMETIMES CHANGING ITALIAN MARKET

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

Activity: FISHERY MISSION OF ITALIAN BUYERS TO CANADA
Expected Results: INCREASE BUSINESS RELATIONS WITH CDN PRODUCERS AND INCREASE SALES

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

Activity: MAINTAIN & IMPROVE POST'S CONTACTS WITH CDN SUPPLIERS
Expected Results: I.D. NEW SUPPLIERS AND LOCAL IMPORTERS/DISTRIBUTORS FOR SAME

Activity: FORWARD PERIODIC REPORTS TO ITALIAN IMPORTERS/DISTRIBUTORS
Expected Results: FACILITATE ADVANCED PROCUREMENT PROCEDURES COMMON IN ITALY

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MILAN

Market: ITALY

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: TELECOM, DATACOM, SAT, SPACECOM

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1750.00 \$M	2200.00 \$M	2500.00 \$M	2800.00 \$M
Canadian Exports	18.00 \$M	22.00 \$M	24.00 \$M	25.00 \$M
Canadian Share of Market	1.00 %	1.00 %	1.00 %	1.00 %

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

Major Competing Countries Market Share

GERMANY WEST	30.00 %
JAPAN	20.00 %
UNITED KINGDOM	10.00 %
FRANCE	10.00 %
NETHERLANDS	10.00 %
UNITED STATES OF AMERICA	10.00 %

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

Products/services for which there are good market prospects:

1. PABX COMPONENTS
2. DATA ACQUISITION EQUIPMENT
3. LAN'S
4. FIBER OPTICS COMPONENTS
5. CELLULAR TELEPHONY

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Trade Fair activity
- Competitive pricing

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MILAN

Market: ITALY

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Restrictive standards
- Non-competitive pricing
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored

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

Activity: I.D. MOST SUITABLE LOCAL COMPANIES TO ACT AS AGENTS
Expected Results: INCREASE NUMBER OF CDN COMPANIES REPRESENTED AND THEREBY EXPAND SALES

Activity: CONTINUOUS MONITORING OF TELECOM MARKET TO ALERT CDN SUPPL.
Expected Results: INCREASE CDN AWARENESS OF MARKET AS A LARGE AND POTENTIALLY PROFITABLE ONE

Activity: UNDERTAKE STUDY OF FIBER OPTICS SECTOR TO ASSESS MARKET
Expected Results: DETERMINE APPROPRIATENESS OF FUTURE TRADE MISSION IN THIS AREA

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MILAN

Market: ITALY

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: COMPUTERS HARD/SOFTWARE & COMP

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	3700.00 \$M	4400.00 \$M	5000.00 \$M	5700.00 \$M
Canadian Exports	10.00 \$M	19.00 \$M	20.00 \$M	25.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	0.00 %

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

Major Competing Countries Market Share

UNITED STATES OF AMERICA	20.00 %
GERMANY WEST	25.00 %
JAPAN	15.00 %
NETHERLANDS	10.00 %
FRANCE	10.00 %
UNITED KINGDOM	10.00 %

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

Products/services for which there are good market prospects:

1. TERMINALS
2. INTERFACES
3. SOFTWARE

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

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

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MILAN

Market: ITALY

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

Activity: SMAU 89 - OCTOBER

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

Activity: I.D. MOST APPROPRIATE LOCAL CO. CAPABLE OF ACTING AS AGENTS
Expected Results: APPOINTMENT OF ADDITIONAL AGENTS AND THEREBY INCREASED SALES

Activity: MONITOR LOCAL MARKET TRENDS TO SOURCE ACTIVELY CDN SUPPLIERS
Expected Results: INCREASE CDN AWARENESS OF MARKET AND ESTABLISH A FEW BUYING CONNECTIONS

Activity: I.D. SPECIALIZED TRADE MAGAZINES SUITABLE TO INTRO. NEW PROD
Expected Results: INCREASE ITALIAN AWARENESS OF CDN SUPPLIERS AND EXPAND SALES

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MILAN

Market: ITALY

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: INSTRUMENTA & PROCESS CONTROLS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	850.00 \$M	1000.00 \$M	1200.00 \$M	1500.00 \$M
Canadian Exports	9.00 \$M	6.00 \$M	8.00 \$M	10.00 \$M
Canadian Share of Market	1.00 %	0.60 %	0.60 %	0.60 %

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

Major Competing Countries	Market Share
GERMANY WEST	30.00 %
JAPAN	20.00 %
UNITED KINGDOM	10.00 %
FRANCE	10.00 %
NETHERLANDS	10.00 %
UNITED STATES OF AMERICA	10.00 %

Current Status of Canadian
exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. NON-DESTRUCTIVE TESTING EQUIPMENT
2. SENSING DEVICES
3. PROCESS CONTROL FOR CAM AND FMS

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Trade Fair activity
- Competitive pricing

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MILAN

Market: ITALY

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MILAN

Market: ITALY

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored
- Performance of local agent or representative
- CDN SUPPLIERS TEND TO LOOK AT EURO.
- AS SPOT MKT-INADEQ. FOR ITAL. BUYER

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: UPDATE FIVE YR "STRATEGIC MARKETING APPROACH" SUBMITTED - 87
Expected Results: UPDATE AND AGREEMENTS ON ACTION PLAN/OBJECTIVES

Activity: ELABORATION & DEF'N OF INFORMAL SELLER/BUYER ADVISORY COMM.
Expected Results: MORE COORDINATED MARKETING APPROACH

For the next fiscal year, the mission will carry out the following approved fairs and missions:

Activity: OUTGOING CONSTRUCTION LUMBER MISSION (OCTOBER 89)
Expected Results: INITIATE SALES TO ITALY

For the next fiscal year, the mission is planning to undertake the following new export support initiative(s) in this sector/sub-sector:

Activity: HOLD TWO/THREE CONFERENCES/WORKSHOPS IN MAJOR CITIES
Expected Results: DISSEMINATION OF TECHNICAL INFO AND INCREASED AWARENESS OF OUR SUPPLY POTENTIAL

Activity: I.D. NEW/RENEW PERSONAL CONTACTS AMONG MAJOR LUMBER DISTRIB.
Expected Results: ESTABLISH NEW DISTRIBUTORSHIPS AND EXPAND SALES OF LUMBER & PLYWOOD

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MILAN

Market: ITALY

Sector : FOREST PRODUCTS, EQUIP, SERVICES

Sub-Sector: PULP AND PAPER PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	3200.00 \$M	3850.00 \$M	4300.00 \$M	4600.00 \$M
Canadian Exports	260.00 \$M	308.00 \$M	335.00 \$M	350.00 \$M
Canadian Share of Market	8.10 %	8.00 %	7.80 %	7.60 %

Cumulative 3 year export potential for
CDN products in this sector/subsector: 100+ \$M

Major Competing Countries Market Share

GERMANY WEST	17.00 %
SWEDEN	16.00 %
FRANCE	11.00 %
AUSTRIA	9.00 %
UNITED STATES OF AMERICA	8.00 %
FINLAND	6.00 %

Current Status of Canadian
exports in this sector/subsector: Market share declining

Products/services for which there are good market prospects:

1. PULP
2. PAPER & PAPERBOARD
3. MANUFACTURED PAPER PRODUCTS E.G. COMPUTER FORMS

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- Competitive Canadian financing
- RELATIVELY LOW & STABLE
- DOLLAR RATE OF EXCHANGE

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MILAN

Market: ITALY

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Restrictive quotas
- Non-competitive pricing
- Lack of promotion and advertising
- MKT PROSPECTS LONG STANDING HAVEN'T
- BEEN ADEQUATELY EXPLORED.

For the next fiscal year, the mission will carry out the following approved fairs and missions:

Activity: OUTGOING SPECIALTY PAPERS AND MF'S PAPER PRODUCTS MISSION
Expected Results: INITIATE PENETRATION OF ITALIAN MKT FOR CDN PRODUCTS

For the next fiscal year, the mission is planning to undertake the following new export support initiative(s) in this sector/sub-sector:

Activity: INVESTIGATE ITALIAN IMPORT MARKET - CDN SUPPLY CAPABILITIES
Expected Results: I.D. 2/3 SPECIFIC NICHES AND CDN SUPPLIERS FOR PAPER PRODUCTS

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MILAN

Market: ITALY

Sector : EDUCATION, MEDICAL, HEALTH PROD

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	0.00 \$M	6850.00 \$M	8960.00 \$M	11500.00 \$M
Canadian Exports	4.20 \$M	8.60 \$M	10.00 \$M	12.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	0.00 %

Cumulative 3 year export potential for
CDN products in this sector/subsector: 30-60 \$M

Major Competing Countries

Market Share

GERMANY WEST	20.00 %
UNITED STATES OF AMERICA	18.00 %
FRANCE	15.00 %
JAPAN	10.00 %
NETHERLANDS	10.00 %
UNITED KINGDOM	8.00 %

Current Status of Canadian
exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. BIOTECHNOLOGY RELATED EQUIPMENT
2. BIOTECHNOLOGY RELATED SERVICES
3. BIOTECHNOLOGY RELATED INSTRUMENTS
4. TESTING EQUIPMENT
5. MEDICAL SUPPLIES
6. X-RAY DETECTION EQUIPMENT
7. HIGH QUALITY DISPOSABLES
8. DIAGNOSTIC EQUIPMENT (ELECTRICAL)
9. DENTAL EQUIPMENT

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Competitive pricing
- willingness of exporters to invest/joint venture in territory

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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: MILAN

Country: ITALY

The mission has proposed the following investment promotion activities for the next fiscal year:

	Date
Type: COMMUNICATIONS EXHIBIT	
INFO BOOTH AT MOBILE	9/89
Location: MILAN, UDINE	
Invest Nature: VARIOUS	
Sector: FISHERIES, SEA PRODUCTS & SERV.	
Cooperants: ISTC, IND. ASSOC. CONSULTANTS	
Estimated Budget: \$6,000.00	
Type: MISSION OUT, MINISTERIAL	
INVESTMENT OPPORTUNITIES PRESENTATION	10/89
Location:	
Invest Nature: VARIOUS	
Sector: MULTIPLE SECTORS	
Cooperants: ISTC, INDUSTRY BANKS	
Estimated Budget: \$4,000.00	
Type: MISSION OUT, INDUSTRY	
INFO BOOTH AT BI.MU	10/89
Location: MILAN	
Invest Nature: VARIOUS	
Sector: GRAINS AND OILSEEDS	
Cooperants: ISTC, IND. ASSOC. BANKS	
Estimated Budget: \$5,000.00	
INFO BOOTH AT PACHINTEX 89	11/89
Location: MILAN	
Invest Nature: VARIOUS	
Sector: GRAINS AND OILSEEDS	
Cooperants: ISTC, INV. CDA, IND. ASSOC.	
Estimated Budget: \$5,000.00	
Type: DIRECT MAIL CAMPAIGN	
TAILORED MAIL OUTS TO PRESELECTED COMPANIES	0/89
Location:	
Invest Nature: ALL	
Sector: AGRI & FOOD PRODUCTS & SERVICE	
Cooperants: INV. CANADA ISTC IND. ASSOC.	
Estimated Budget: \$5,000.00	

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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: MILAN

Country: ITALY

Date

Type: OUTCALL PROGRAM

PURSUE CONTACTS WITH INTERMEDIARIES TO UNCOVER ANALYZE LEADS AND OBTAIN SECTORAL INFORMATION 0/89

Location:

Invest Nature: VARIOUS

Sector: MULTIPLE SECTORS

Cooperants:

Estimated Budget: \$3,000.00

CONTINUED CORPORATE LIAISON VISITS AND FOLLOW UP ON LEADS 0/89

Location:

Invest Nature: VARIOUS

Sector: MULTIPLE SECTORS

Cooperants:

Estimated Budget: \$6,000.00

Type: OTHER PROMOTION

PRODUCE SECTORAL STUDIES TO IDENTIFY OPPORTUNITIES 12/89

Location:

Invest Nature: ALL

Sector: AGRI & FOOD PRODUCTS & SERVICE

Cooperants: RESEARCH ORGANIZATIONS

Estimated Budget: \$10,000.00

STRATEGIC PARTNERING. IDENTIFICATION OF ITAL. COMPANIES AND SOURCES OF CAPITAL 0/89

Location: MILAN

Invest Nature: STRATEGIC PARTN

Sector: MULTIPLE SECTORS

Cooperants: INV. CANADA, EXT; DRIE FIN. INTERM.

Estimated Budget: \$3,000.00

RUN SPECIAL ARTICLES ON INVESTMENT OPPORTUNITIES IN CANADA 5/89

Location:

Invest Nature: ALL

Sector: AGRI & FOOD PRODUCTS & SERVICE

Cooperants: ITSTC, INV. CDA, ITAL. MEDIA

Estimated Budget: \$30,000.00

Total estimated budget for all proposals: \$77,000.00

Post : MILAN

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Post/Contact</u>
89/04/06	CHILDREN'S BOOK FAIR, BOLOGNA, ITALY FAIR, NATIONAL STAND	CONSUMER PRODUCTS G.COTE/H.SCHROETER
89/04/15	MILAN SPRING FAIR, MILAN, ITALY INFO BOOTH, ONLY	GENERAL OR UNASSIGNED ISB D.ADAMS/G.COTE
89/10/05	SMAU-INT'L OFFICE EXH.(DATA PROCESSING EQUIP.)MILAN, ITALY FAIR, NATIONAL STAND	ADVANCED TECH. PROD. & SERV D.ADAMS/G.COTE
89/10/25	SAIE-BUILDING INDUSTRIALIZATION SHOW, BOLOGNA, ITALY INFO BOOTH, ONLY	CONSTRUCTION INDUSTRY H.SCHROETER/G.COTE
90/03/00	FIERA AGRICOLA, VERONA, ITALY FAIR, NATIONAL STAND	AGRI & FOOD PRODUCTS & SERVICE
90/03/00	VERONA AGRICULTURAL FAIR, ITALY FAIR, NATIONAL STAND	AGRI & FOOD PRODUCTS & SERVICE G.COTE/D.ADAMS

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: BONN

Country: GERMANY WEST

THE FRG IS THE DOMINANT ECONOMY IN EUROPE. ALTHOUGH PLAGUED BY STRUCTURAL RIGIDITIES AND A HIGH UNEMPLOYMENT RATE, THE ECONOMY GREW BY A SURPRISING RATE OF 3.5 PERCENT IN 1988 AND INFLATION WAS HELD AT A VERY LOW RATE IN THE RANGE OF ONE TO TWO PERCENT. GROWTH IN 1989 IS EXPECTED TO MODERATE TO ABOUT TWO PERCENT. IN THE ABSENCE OF ANY MAJOR RESOURCE ENDOWMENTS (OTHER THAN COAL), THE ECONOMY RELIES ON MANUFACTURING HIGH QUALITY TECHNOLOGICALLY ADVANCED PRODUCTS DEVELOPED AGAINST THE BACKGROUND OF A SERIOUS COMMITMENT TO RESEARCH AND TECHNOLOGY DEVELOPMENT BY THE PRIVATE SECTOR AND ALL LEVELS OF GOVERNMENT.

2. THE FRG MARK IS THE STRONGEST CURRENCY WITHIN THE EUROPEAN MONETARY SYSTEM AND, ALTHOUGH IT HAS RECENTLY MODERATED, IT IS STRONG AGAINST THE DOLLAR. HOWEVER, THIS HAS NOT IMPAIRED THE COUNTRY'S ABILITY TO ACCUMULATE HUGE TRADE SURPLUSES. GERMANY REMAINS THE WORLD'S LARGEST EXPORTER WITH A SURPLUS OF \$ US 45 BILLION; IT IS ALSO THE WORLD'S SECOND LARGEST IMPORTER AND IT IS ENCOURAGING TO NOTE THAT IMPORTS HAVE BEEN RISING FASTER THAN EXPORTS RECENTLY. THE FRG IS CANADA'S FOURTH LARGEST EXPORT MARKET TAKING \$ 1.8 BILLION WORTH OF PRODUCTS IN 1988.

3. AGAINST THIS BACKGROUND, THE FRG PRESENTS AN IDEAL EXPORT MARKET AND INVESTMENT AND SCIENCE AND TECHNOLOGY SOURCE FOR CANADA. OUR RESOURCES ARE AND ALWAYS WILL BE IN HIGH DEMAND; OUR SEMI- AND FULLY-MANUFACTURED EXPORTS WHICH HAVE BEEN GROWING RECENTLY ARE BECOMING INCREASINGLY COMPETITIVE DUE TO THE DIRECTION OF CURRENT EXCHANGE RATES; AS THE FRG REMAINS ON THE LEADING EDGE OF APPLYING THE RESULTS OF RESEARCH AND TECHNOLOGICAL DEVELOPMENT TO INDUSTRIAL APPLICATIONS, OUR FIRMS CAN LEARN AND ACQUIRE THESE APPLICATIONS TO INCREASE AND DIVERSIFY OUR OWN INDUSTRIAL OUTPUT; CAPITAL CONTINUES TO FLOW OUT OF THE FRG AND WITH THE ACCESS TO THE USA MARKET RESULTING FROM THE FTA, CANADA WILL BE AN ATTRACTIVE LOCATION FOR INVESTMENT; THE STRONG MARK AND GERMAN PROPENSITY FOR TRAVEL PRESENT EXCELLENT OPPORTUNITIES TO ENCOURAGE TOURISM.

4. THE BONN TRADE SECTION IS RESPONSIBLE FOR TRADE PROMOTION IN THE FOLLOWING SECTORS. -DEFENCE PRODUCTS, -SECURITY EQUIPMENT, -CONSUMER PRODUCTS, (-BOOKS, -MUSICAL INSTRUMENTS, -ART AND HANDICRAFT), -TRANSPORTATION & DISTRIBUTION SERVICES, -MARINE AND SHIPBUILDING.

5. THERE ARE SIGNIFICANT TRADE POLICY ISSUES LOOMING IN THE YEARS AHEAD. AS A MAJOR EXPORTING NATION, THE FRG WILL BE AN IMPORTANT ALLY FOR CANADA IN OUR ENDEAVOURS TO ENSURE THAT OUR ACCESS INTERESTS ARE ACHIEVED IN THE URUGUAY ROUND AND TO ENSURE THAT THE MOVEMENT TOWARD AN EC INTERNAL MARKET FREE OF BARRIERS BY 1992 IS NOT DONE BY ERECTING BARRIERS TO NON-EC TRADE. IN SOME AREAS, AGRICULTURE AND CERTAIN INDUSTRIES FACING STRUCTURAL PROBLEMS SUCH AS COAL, THE FRG IS NOT AS PROGRESSIVE IN ITS INTERNATIONAL POLICY AS THEY ARE OVERALL. WE MUST WORK CAREFULLY TO ENSURE THAT THEIR POLICY POSITIONS, REFLECTED IN BRUSSELS, ARE AS LIBERAL AS POSSIBLE TO ENABLE CANADA TO ACHIEVE OUR MARKET ACCESS GOALS.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 EXPORT PROMOTION PRIORITIES

Mission: BONN

Country: GERMANY WEST

The Mission selected the following sectors as priority areas for export promotion activities for the coming fiscal year for the stated reason:

1. DEFENCE PROGRAMS, PRODUCTS, SERV
GOVT TO GOVT MOU ON DEFENCE TRADE OFFERS GOOD POSSIBILITIES FOR DIRECT SALE, JOINT VENTURES AND COOPERATIVE R & D.
SECURITY EQUIPMENT MARKET IS RAPIDLY GROWING IN FRG.
2. AGRI & FOOD PRODUCTS & SERVICE
GOOD DEMAND FOR AG., FISH & FOOD PRODUCTS EXISTS BUT MARKET IS HIGHLY REGULATED AND STRICTLY CONTROLLED.
3. CONSUMER PRODUCTS & SERVICES
CULTURAL INDUSTRY HAS GOOD MARKETS IN HIGHLY DEVELOPED FRG.
4. ADVANCED TECH. PROD. & SERV
DEREGULATION OF COMMUNICATIONS BY BUNDESPOST HAS CREATED GOOD OPPORTUNITIES FOR NEW TECHNOLOGY.
5. FISHERIES, SEA PRODUCTS & SERV.

The most important current Canadian export sectors to this market are (based on actual export sales):

- | | |
|-------------------------------------|---------------------------------|
| 1. DEFENCE PROGRAMS, PRODUCTS, SERV | 4. CONSUMER PRODUCTS & SERVICES |
| 2. ADVANCED TECH. PROD. & SERV | |
| 3. FISHERIES, SEA PRODUCTS & SERV. | |

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BONN

Market: GERMANY WEST

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: SEMI & PROCESSED FOOD & DRINK

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	11985.00 \$M	12724.00 \$M	12100.00 \$M	12900.00 \$M
Canadian Exports	21.00 \$M	18.00 \$M	20.00 \$M	21.00 \$M
Canadian Share of Market	0.18 %	0.14 %	0.17 %	0.16 %

Cumulative 3 year export potential for
CDN products in this sector/subsector: 15-30 \$M

Major Competing Countries	Market Share
OTHER COUNTRIES	52.00 %
EUROPEAN COMMON MARKET C	42.00 %
COMECON	5.00 %

Current Status of Canadian
exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. PRE-COOKED FROZEN MEALS
2. FRESH & FROZEN BERRIES
3. MAPLE PRODUCTS
4. WILD RICE

Factors contributing to current successful Canadian exports:

- PEMD support
- Fairs and Missions support
- Trade Fair activity
- Canada is one of few sources of supply

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BUNN

Market: GERMANY WEST

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Import duties are high
- Restrictive quotas
- Restrictive standards
- Non-competitive pricing
- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored
- CERTIFICATES
- LONG-TERM COMMITMENT.

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: LIVE ANIMALS, SEMEN (SANITARY REGS)
Expected Results: STANDSTILL, REDUCTION AND REMOVAL OF TARIFFS AND NTBS IN AGRICULTURE SECTOR.

Activity: MEAT (HORMONES, THIRD COUNTRY DIRECTIVE)

Activity: GRAINS, OIL AND FLOUR PULSES (SUBSIDIES, LEVIES, IMPORT DEP)

Activity: WINE (SUBSIDIES ON GRAPES) PROCESSING

For the next fiscal year, the mission will carry out the following approved fairs and missions:

Activity: BERLIN GREEN WEEK
Expected Results: INCREASED UNDERSTANDING FOR CDN & GERMAN POSITIONS ON AGRICULTURE ISSUES.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BONN

Market: GERMANY WEST

For the next fiscal year, the mission is planning to undertake the following new export support initiative(s) in this sector/sub-sector:

Activity: REPORTING, ETC ON CONDUCT OF GATT URUGUAY ROUND
Expected Results: INFLUENCE FRG TO ADOPT LESS PROTECTIONIST POSITIONS.
INCREASE ACCESS TO EC FOR CDN AGRICULTURAL PRODUCTIONS.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BONN

Market: GERMANY WEST

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: OTHER DEFENSE PROD & SERV.

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	4.42 \$M	4.75 \$M	5.10 \$M	5.46 \$M
Canadian Exports	0.25 \$M	0.20 \$M	0.20 \$M	0.20 \$M
Canadian Share of Market	6.00 %	4.20 %	3.90 %	3.60 %

Cumulative 3 year export potential for
CDN products in this sector/subsector: 0-1 \$M

Major Competing Countries	Market Share
GERMANY WEST	70.00 %
UNITED STATES OF AMERICA	0.00 %
UNITED KINGDOM	0.00 %
NETHERLANDS	0.00 %
FRANCE	0.00 %
ITALY	0.00 %

Current Status of Canadian
exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. INTRUSION DETECTION
2. ACCESS CONTROL
3. TEMPEST EQUIPMENT
4. SYSTEMS COMPONENTS

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- Trade Fair activity
- Provincial export promotion
- Strong sectoral capability in Canada
- ACTIVE SUPPORT OF EMBASSY

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BONN

Market: GERMANY WEST

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored
- NORMAL OBSTACLES PRE
- BY FOREIGN GOVT

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: FOLLOW UP ON TRADE ENQUIRIES FROM SECURITY '88 FAIR
Expected Results: ESTABLISH AND STRENGTHEN CO. CONTACTS: EXP. SALES

Activity: REQUEST CDN SUPPLIERS TO SUBMIT NEW PRODUCT INFO FOR DISTR.
Expected Results: ESTABLISH AND STRENGTHEN CO. CONTACTS: EXP. SALES

Activity: CONTINUE SURVEY OF GERMAN MFGRS AND INSTALLERS INTEREST
Expected Results: IMPROVED ABILITY TO TARGET MARKET SEGMENTS.

For the next fiscal year, the mission will carry out the following approved fairs and missions:

Activity: SECURITY '90 ESSEN 20 - 23 NOV, 1990
Expected Results: UP TO \$250,000 SALES ON SITE. \$500,000 SALES PROSPECTS.

For the next fiscal year, the mission is planning to undertake the following new export support initiative(s) in this sector/sub-sector:

Activity: CLOSER MONITORING OF FRG GOVT PROCUREMENT
Expected Results: CDN BIDS ON UP TO 10 MAJOR TENDERS.

Activity: SUB-SECTOR PROFILES OF FRG SECURITY PRODUCTS MARKET
Expected Results: IMPROVED TARGETING OF PROMOTIONAL WORK AND EXPECTED

Activity: UP DATE OF DEA LITERATURE ON CDN EXPORT CAPABILITIES
Expected Results: ON SITE SALES AT SECURITY '90 AS ABOVE.

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BONN

Market: GERMANY WEST

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: MARINE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1035.00 \$M	1050.00 \$M	1100.00 \$M	1150.00 \$M
Canadian Exports	3.50 \$M	3.00 \$M	4.00 \$M	5.00 \$M
Canadian Share of Market	0.33 %	0.28 %	0.36 %	0.43 %

Cumulative 3 year export potential for
CDN products in this sector/subsector: 30-60 \$M

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	5.00 %
UNITED KINGDOM	2.00 %
FRANCE	2.00 %
NETHERLANDS	1.00 %
SWEDEN	1.00 %
ITALY	1.00 %

Current Status of Canadian

exports in this sector/subsector: Well established and growing

Products/services for which there are good market prospects:

1. HELICOPTER RECOVERY SYSTEM
2. ON-BOARD HELICOPTER HANGERS
3. ANTI-SUBMARINE ELECTRONICS
4. SHINPADS
5. SHINCOM
6. IR SUPPRESSION
7. MINE COUNTERMEASURES
8. SURVEILLANCE SYSTEMS (SHIPBORNE)

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BONN

Market: GERMANY WEST

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Competitive pricing
- Strong sectoral capability in Canada
- Bilateral economic trade agreement
- willingness of exporters to invest/joint venture in territory
- NATO FRIGATE OFFICE IN
- HAMBURG HAS SOME
- CANADIAN STAFF.

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: PRESENTATION ON NFR 90 FRIGATE PROGRAM
Expected Results: MARKET IDENTIFICATION.

Activity: HITEC 90
Expected Results: SUPPLIER IDENTIFICATION.

Activity: NAVAL INDUSTRY LIAISON
Expected Results: MARKET IDENTIFICATION.

For the next fiscal year, the mission will carry out the following approved fairs and missions:

Activity: DEFENCE TRADE MISSION TO CANADA 90
Expected Results: JOINT VENTURE TECH. TRANSFER

Activity: INTERNATIONAL SHIPPING & MARINE SHOW HAMBURG 90
Expected Results: MARKET IDENTIFICATION.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BONN

Market: GERMANY WEST

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	36900.00 \$M	38500.00 \$M	38500.00 \$M	40000.00 \$M
Canadian Exports	98.00 \$M	120.00 \$M	200.00 \$M	150.00 \$M
Canadian Share of Market	0.26 %	0.31 %	0.51 %	0.31 %

Cumulative 3 year export potential for
CDN products in this sector/subsector: 100+ \$M

Major Competing Countries Market Share

UNITED STATES OF AMERICA	10.00 %
FRANCE	2.00 %
UNITED KINGDOM	1.00 %
ITALY	1.00 %
BELGIUM	0.50 %
SWEDEN	0.25 %

Current Status of Canadian
exports in this sector/subsector: well established and growing

Products/services for which there are good market prospects:

1. ARMAMENTS
2. AIRCRAFT AIRFRAMES
3. NAVAL EQUIPMENT
4. AVIONICS
5. ELECTRONIC WARFARE
6. SIMULATORS
7. ORDNANCE
8. VEHICLES

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Competitive pricing
- Strong sectoral capability in Canada
- Bilateral economic trade agreement
- willingness of exporters to invest/joint venture in territory

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BONN

Market: GERMANY WEST

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: FOLLOW-UP TO 1988 DEFENCE MISSION TO GERMAN
Expected Results: EXPANDED CONTACTS WITH LOCAL COS.

Activity: HITEC 89 MEETINGS WITH CAN. FIRMS
Expected Results: IDENTIFICATION OF NEW SUPPLIERS.

Activity: FOLLOW-UP OF 1987 RESEARCH DEV. & PROD. MEETING
Expected Results: MARKET OPPORTUNITIES.

For the next fiscal year, the mission will carry out the following approved fairs and missions:

Activity: DEFENCE TRADE MISSION TO CANADA 1990
Expected Results: TECH TRANSFER, JOINT VENTURES.

Activity: I.L.A. (INTERN. AIR SHOW HANNOVER) 1990
Expected Results: MARKET DEVELOPMENT.

For the next fiscal year, the mission is planning to undertake the following new export support initiative(s) in this sector/sub-sector:

Activity: NATO FRIGATE PROGRAM
Expected Results: EXPORT OPPORTUNITIES.

Activity: DEFENCE SCIENCE MDU FOLLOW-UP
Expected Results: NEW R & D PROJECTS.

Activity: NEW ATTACK HELICOPTER
Expected Results: SIMULATOR OPPORTUNITY.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BDNN

Market: GERMANY WEST

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1210.00 \$M	1800.00 \$M	1700.00 \$M	1800.00 \$M
Canadian Exports	21.20 \$M	31.00 \$M	31.00 \$M	35.00 \$M
Canadian Share of Market	1.70 %	1.70 %	1.80 %	1.90 %

Cumulative 3 year export potential for
CDN products in this sector/subsector: 100+ \$M

Major Competing Countries Market Share

JAPAN	35.00 %
UNITED STATES OF AMERICA	13.00 %
FRANCE	12.00 %
NETHERLANDS	7.00 %
UNITED KINGDOM	5.00 %
ITALY	5.00 %

Current Status of Canadian
exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. DATA TELECOMMUNICATIONS
2. ISDN PRODUCTS
3. MOBILE RADIO
4. FIBRE OPTICAL EQPT

Factors contributing to current successful Canadian exports:

- PEMD support
- Fairs and Missions support
- Provincial export promotion
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BONN

Market: GERMANY WEST

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Restrictive standards
- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- Performance of local agent or representative

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: ANALYSIS & REPORTING ON REFORM OF FED. POSTS & TELECOM
Expected Results: FACILITATE PROMOTION OF CDN TELECOM PRODUCTS IN FRG.

Activity: MONITORING OF GOVT/MIN PROCUREMENT PROGRAMS AND POLICIES
Expected Results: INCREASE BIDS & CONTRACT AWARDS BY 5%.

Activity: EXPAND EXCHANGES BTWN CAN & GER ON BROADBAND COMMUN TECH
Expected Results: TECHNOLOGY TRANSFER IN ISDN BROADBAND; INITIAL SALES OF CDN SERVICES & EQPT.

For the next fiscal year, the mission will carry out the following approved fairs and missions:

Activity: CEBIT
Expected Results: INTRODUCTION OF 10 NEW CDN COS TO FRG MARKET.

For the next fiscal year, the mission is planning to undertake the following new export support initiative(s) in this sector/sub-sector:

Activity: SUPPORT CDN CO. TO OPERATE MOBILE TELEPHONE NET
Expected Results: CDN CO. TO OPERATE PRIVATE SECTOR, NET.

Activity: PRESENTATION OF CDN EQPT TO BUNDESPOST (W/MUNICH)
Expected Results: 5% INCREASE IN SALES OF EQPT.

Activity: FOLLOW UP OF VISIT TO CAN OF MINISTER OF POSTS & TELECOMMUN
Expected Results: INCREASED PROFILE FOR CANADA IN PROCUREMENT OF TELECOM EQUIPMENT.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BONN

Market: GERMANY WEST

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: CULTURE INDUSTRIES

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	350.00 \$M	376.00 \$M	390.00 \$M	400.00 \$M
Canadian Exports	0.46 \$M	0.43 \$M	0.50 \$M	0.55 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	0.00 %

Cumulative 3 year export potential for
CDN products in this sector/subsector: 1-3 \$M

Major Competing Countries

Market Share

UNITED KINGDOM	14.00 %
UNITED STATES OF AMERICA	13.00 %
ITALY	8.00 %
FRANCE	4.00 %
NETHERLANDS	5.00 %
BELGIUM	2.00 %

Current Status of Canadian
exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. CHILDRENS BOOKS
2. BOOKS ABOUT CANADA
3. CANADIAN FICTION
4. COOK BOOKS

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Fairs and Missions support
- Canada is one of few sources of supply

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Market prospects have not been adequately explored
- Performance of local agent or representative

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BONN

Market: GERMANY WEST

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: RESPONSES TO TRADE ENQUIRIES FROM PUBLISHERS & AUTHORS
Expected Results: RIGHTS SALES OF \$50,000.

For the next fiscal year, the mission will carry out the following approved fairs and missions:

Activity: FRANKFURT BOOK FAIR.
Expected Results: INTRODUCTION OF NEW AUTHORS AND TITLES ULTIMATELY RIGHT SALES \$ 30,000.

For the next fiscal year, the mission is planning to undertake the following new export support initiative(s) in this sector/sub-sector:

Activity: EXPANSION CONTACTS W/GERMAN PUBLISHERS & AGENTS.

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RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: BONN

Country: GERMANY WEST

The mission reports that the approximate flows to all countries of investment from its country/territory in Canadian \$ is as follows: (including portfolio flows if a primary focus)

	Total (\$ Million)	Canadian Share	Major Competitor Share
Current year	13533.00	3.40	50.80
One year ago	10987.00	2.40	47.70
Two years ago	10000.00	2.30	49.00

The mission is of the opinion that Canada can reasonably expect to attract the following amount of foreign investment from its territory/country next year:

233 MILLION.

Canada's major competitors for investment from this territory/country are:

- U.S.A.
- GREAT BRITAIN
- NETHERLANDS
- FRANCE
- BELGIUM/LUXEMBURG
- SWITZERLAND

The following types of activities are currently being undertaken by Canada's major competitors to attract investment from this territory/country:

- NATIONAL ADVERTISING CAMPAIGNS.
- SEMINARS
- NATIONAL PRESENTATIONS AT FAIRS.
- DIRECT MAIL CAMPAIGNS AND CALLS BY NATIONAL, REGIONAL AND MUNICIPAL PROMOTERS.

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: BONN

Country: GERMANY WEST

Compared to major competitive destinations, Canada is perceived to have

the following advantages:

- F.T.A.
- LAW & ORDER
- EUROPEAN ATMOSPHERE
- POLITICAL STABILITY.
- SECURE RAW MATERIAL BASE.

the following constraints:

- STRONG IMAGES OF U.S.A.
- PREFERENCE FOR EEC COUNTRIES
- COLD CLIMATE
- SMALL MARKET SIZE
- ABSENCE OF NEWS ON CANADA

The mission indicates the following potential for various types of investment from within its territory/country:

Type of Investment	Potential
Portfolio	LOW
Acquisition	HIGH
Greenfield	HIGH
Joint Venture	MEDIUM
Strategic Partnering	LOW
Technology Licensing	MEDIUM

The mission believes that the following sectors are of greatest interest to investors in its territory/country with an assigned ranking of 1-10:

Sector	Ranking
Agriculture/Food/Fish	6
Resource Processing	3
Machinery and Equipment	1
Transportation	2
Consumer Products	8
Commercial Service	10
Computer and Communications	4
Health Care Products/Medical	7
Aerospace and Defence	5
Strategic Technologies	9

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: BONN

Country: GERMANY WEST

The mission has proposed the following investment promotion activities for the next fiscal year:

	Date
Type: SEMINAR, ABROAD	
SEMINAR/DINNER FOR ENTREPRENEURS.	1/90
Location: KASSEL	
Invest Nature: GREENFIELD	
Sector: DEFENCE PROGRAMS, PRODUCTS, SERV	
Cooperants: HESSISCHE LANDESBANK	
Estimated Budget: \$3,000.00	
SEMINAR/LUNCH FOR ENTREPRENEURS.	4/89
Location: BERLIN	
Invest Nature: GREENFIELD	
Sector: GRAINS AND OILSEEDS	
Cooperants: CHAMBER OF COMM. BERLIN	
Estimated Budget: \$3,000.00	
SEMINAR TO INTRODUCE WESTERN INCENTIVES.	10/89
Location: FRG	
Invest Nature: ACQUISITION GREENFIELD	
Sector: FISHERIES, SEA PRODUCTS & SERV.	
Cooperants: BC, ALTA, SASK, MAN	
Estimated Budget: \$7,000.00	
Type: MISSION IN, TO INDUSTRY	
CROSS-COUNTRY TOUR OF 7 INVESTMENT ADVISORS.	9/89
Location:	
Invest Nature: ACQUISITION GREENFIELD JOINT VENTURES	
Sector: GRAINS AND OILSEEDS	
Cooperants: INVESTMENT CANADA	
Estimated Budget: \$42,700.00	
CROSS-COUNTRY TOUR OF 7 INVESTMENT WRITERS	5/89
Location:	
Invest Nature: ACQUISITION GREENFIELD JOINT VENTURES	
Sector: GRAINS AND OILSEEDS	
Cooperants: INVESTMENT CANADA	
Estimated Budget: \$42,700.00	

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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: BONN

Country: GERMANY WEST

Date

Type: DIRECT MAIL CAMPAIGN

MATCHING OF VENTURE CAPITAL FIRMS

6/89

Location: FRG

Invest Nature: STRATEGIC PARTN

Sector: FISHERIES, SEA PRODUCTS & SERV.

Cooperants: ACOA

Estimated Budget: \$7,000.00

Type: OTHER PROMOTION

ADVERTISING CAMPAIGN TO RE-INFORCE IMAGE OF CANADA AS
EXCELLENT SITE OF INVESTMENT.

10/89

Location: FRG

Invest Nature: ACQUISITION

GREENFIELD

JOINT VENTURES

Sector: AGRI & FOOD PRODUCTS & SERVICE

Cooperants:

Estimated Budget: \$200,000.00

Total estimated budget for all proposals:

\$305,400.00

89/06/12 RP-A10 PEMD - Government Initiated Activities 1989 431A)

Post : BONN

Start Date Event Name, Location & Type Sector/Post/Contact

89/10/12	FRANKFURT BOOK FAIR, FRANKFURT WEST GERMANY FAIR, NATIONAL STAND	CONSUMER PRODUCTS G.COTE/H.SCHROETER
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RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: DUSSELDORF

Country: GERMANY WEST

THE FRG IS THE DOMINANT ECONOMY IN EUROPE. ALTHOUGH PLAGUED BY STRUCTURAL RIGIDITIES AND HIGH UNEMPLOYMENT RATE, THE ECONOMY GREW BY A SURPRISING RATE OF 3.5 PERCENT IN 1988 AND INFLATION WAS HELD AT A VERY LOW RATE IN THE RANGE OF ONE TO TWO PERCENT. GROWTH IN 1989 IS EXPECTED TO MODERATE TO ABOUT TWO PERCENT. IN THE ABSENCE OF ANY MAJOR RESOURCE ENDOWMENTS (OTHER THAN COAL), THE ECONOMY RELIES ON MANUFACTURING HIGH QUALITY TECHNOLOGI- CALLY ADVANCED PRODUCTS DEVELOPED AGAINST THE BACKGROUND OF A SERIOUS COM- MITMENT TO RESEARCH AND TECHNOLOGY DEVELOPMENT BY THE PRIVATE SECTOR AND ALL NEW LEVELS OF GOVERNMENT.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 EXPORT PROMOTION PRIORITIES

Mission: DUSSELDORF

Country: GERMANY WEST

The Mission selected the following sectors as priority areas for export promotion activities for the coming fiscal year for the stated reason:

1. INDUSTRIAL MACHIN, PLANTS, SERV.
STRENGTH OF GERMAN MARKETING AND SUPPORT OF EDC FINANCING (FOR THIRD COUNTRY COOP). PRICING AND EXCHANGE RATE SHIFT IN FAVOUR OF CDN \$ EXPORTS. LARGE DOMESTIC GERMAN MARKET FOR SPECIALIZED, HIGH QUALITY MACHINERY. FIRST-CLASS INDUSTRIAL TRADE FAIRS IMPORTANT FOR INT'L MARKETING.
2. FOREST PRODUCTS, EQUIP, SERVICES
PRICE COMPETITIVENESS. LARGE MARKET FOR BUILDING MATERIALS AND PAPER PRODUCTS. SPECIAL QUALITIES OF HEMLOCK AND CEDAR. LAUNCH OF EQUIPMENT AND ENGINEERING EXPORTS FOR EASTERN EUROPE MARKET.
3. CONSUMER PRODUCTS & SERVICES
LARGE DOMESTIC MARKET AND HIGH LEVEL OF CONSUMER SPENDING. NEW REPUTATION OF CANADIAN DESIGN FOR FASHION (LARGELY UNKNOWN HERE). EXCELLENT MARKET EXPOSURE THROUGH TRADE FAIRS (FURNITURE, FASHIONS, LEISURE WEAR, ETC.).
4. FISHERIES, SEA PRODUCTS & SERV.
DIVERSIFY MARKETS FOR CANADIAN SEAFOOD PRODUCTS. LARGE MARKET WITH GOOD DISTRIBUTION NETWORK. GERMANY IS SOURCE OF PRODUCT-ENHANCING TECHNOLOGY (I.E. PROCESSING).
5. AGRI & FOOD PRODUCTS & SERVICE
LARGE DOMESTIC MARKET WITH GOOD DISTRIBUTION NETWORK. COMPETITIVE PRICING IN CANADIAN \$. UNIQUE FOOD SHOW ANUGA IN OCTOBER, 1989.

The most important current Canadian export sectors to this market are (based on actual export sales):

- | | |
|-------------------------------------|-------------------------------------|
| 1. FOREST PRODUCTS, EQUIP, SERVICES | 4. FISHERIES, SEA PRODUCTS & SERV. |
| 2. MINE, METAL, MINERAL PROD & SRV | 5. INDUSTRIAL MACHIN, PLANTS, SERV. |
| 3. AGRI & FOOD PRODUCTS & SERVICE | |

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DUSSELDORF

Market: GERMANY WEST

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: SEMI & PROCESSED FOOD & DRINK

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	11985.00 \$M	12724.00 \$M	12100.00 \$M	12900.00 \$M
Canadian Exports	21.00 \$M	18.00 \$M	20.00 \$M	21.00 \$M
Canadian Share of Market	0.18 %	0.14 %	0.17 %	0.16 %

Cumulative 3 year export potential for
CDN products in this sector/subsector: 15-30 \$M

Major Competing Countries

Market Share

OTHER COUNTRIES	52.00 %
EUROPEAN COMMON MARKET C	42.00 %
COMECON	5.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. PRE-COOKED FROZEN MEALS
2. FRESH & FROZEN BERRIES
3. MAPLE PRODUCTS
4. WILD RICE
5. ORGANIC GRAINS

Factors contributing to current successful Canadian exports:

- PEMD support
- Fairs and Missions support
- Trade Fair activity
- Canada is one of few sources of supply

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DUSSELDORF

Market: GERMANY WEST

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Import duties are high
- Restrictive quotas
- Restrictive standards
- Non-competitive pricing
- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored
- CERTIFICATES
- LONG-TERM COMMITMENT

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: INTRODUCTION TO NEW FIRMS OF FROZEN PRE-COOKED MEALS
Expected Results: INCREASE ANNUAL SALES BY 5-10%

For the next fiscal year, the mission will carry out the following approved fairs and missions:

Activity: ANUGA 1989
Expected Results: INTRODUCE NEW PRODUCTS, IMPROVE DISTRIBUTION, INCREASE SALES BY 5%

For the next fiscal year, the mission is planning to undertake the following new export support initiative(s) in this sector/sub-sector:

Activity: IDENTIFY NEW CHANNELS OF DISTRIBUTION
Expected Results: INCREASE SALES BY 10%

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DUSSELDORF

Market: GERMANY WEST

Sector : FISHERIES, SEA PRODUCTS & SERV.

Sub-Sector: FISH & SHELLFISH & OTHER PROD

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1179.00 \$M	1240.00 \$M	1150.00 \$M	1300.00 \$M
Canadian Exports	25.00 \$M	30.00 \$M	30.00 \$M	33.00 \$M
Canadian Share of Market	2.10 %	2.40 %	2.60 %	2.50 %

Cumulative 3 year export potential for
CDN products in this sector/subsector: 30-60 \$M

Major Competing Countries

Market Share

EUROPEAN COMMON MARKET C
EUROPE

60.00 %
30.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. LIVE LOBSTER
2. FROZEN LOBSTER
3. SHRIMP
4. SMOKED SALMON
5. FROZEN SALMON
6. SALMON ROE

Factors contributing to current successful Canadian exports:

- PEMD support
- Fairs and Missions support
- Trade Fair activity
- Canada is one of few sources of supply
- Strong sectoral capability in Canada

29/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DUSSELDORF

Market: GERMANY WEST

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Import duties are high
- Restrictive quotas
- Non-competitive pricing
- Lack of promotion and advertising
- Market prospects have not been adequately explored
- WAVERING INTEREST IN NON-US MARKETS
- QUALITY FLUCTUATIONS

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: UPDATE FISH FACT SHEETS DESCRIBING MARKET
Expected Results: MAKE CDN AWARE OF OPPORTUNITIES & DISTRIBUTION CHANNELS

For the next fiscal year, the mission will carry out the following approved fairs and missions:

Activity: ANUGA 1989
Expected Results: SALES INCREASE BY 5%. INTRODUCE NEW EXPORTERS TO FRG MKT.

For the next fiscal year, the mission is planning to undertake the following new export support initiative(s) in this sector/sub-sector:

Activity: "CANADA" SECTION IN TRADE JOURNAL
Expected Results: HIGHER PROFILE FOR CDN FISH

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DUSSELDURF

Market: GERMANY WEST

Sector : FOREST PRODUCTS,EQUIP,SERVICES

Sub-Sector: WOOD AND WOOD PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	2180.00 \$M	2140.00 \$M	2130.00 \$M	2040.00 \$M
Canadian Exports	100.00 \$M	95.00 \$M	92.00 \$M	85.00 \$M
Canadian Share of Market	4.60 %	4.40 %	4.30 %	4.20 %

Cumulative 3 year export potential for
CDN products in this sector/subsector: 100+ \$M

Major Competing Countries

Market Share

SWEDEN	25.00 %
FINLAND	20.00 %
UNION OF SOVIET SOC REP	15.00 %
AUSTRIA	10.00 %
FRANCE	5.00 %
UNITED STATES OF AMERICA	5.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. SOFTWOOD JOINERY
2. METRIC DIN PLYWOOD
3. MAPLE FLOURING
4. MAPLE TABLE TOPS
5. CEDAR PANELLING
6. MOULDINGS
7. LOG HOME PACKAGES

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Import duties are moderate
- PEMD support
- Trade Fair activity
- Competitive pricing
- Strong sectoral capability in Canada

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DUSSELDORF

Market: GERMANY WEST

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: INVESTIGATE MKT OPP FOR CDN STAIRCASE COMPONENTS
Expected Results: SAMPLE ORDERS FROM LARGE SCALE STAIRCASE SYSTEM MANUFACTURERS

Activity: CONT EFFORTS W/GERMAN WOOD HOUSE BUILDERS TO INCR CDN CONT.
Expected Results: SAMPLE ORDERS FRO FLOORING, PANELLING AND SIDING

For the next fiscal year, the mission is planning to undertake the following new export support initiative(s) in this sector/sub-sector:

Activity: PRODUCE FOLDER ON CDN CAPABILITIES IN THE WOOD PROD. SECTOR
Expected Results: SAMPLE ORDERS FOR CANADIAN FINISHED PRODUCTS

Activity: ACTIVE SUPPORT OF UNIVERSITY SEMINARS ON WOOD BLDG MATERIALS
Expected Results: INCREASE AWARENESS ON PROVEN CANADIAN BUILDING COMPONENTS

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DUSSELDORF

Market: GERMANY WEST

Sector : FOREST PRODUCTS, EQUIP, SERVICES

Sub-Sector: PULP AND PAPER PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	3550.00 \$M	3500.00 \$M	3470.00 \$M	3003.00 \$M
Canadian Exports	600.00 \$M	600.00 \$M	582.00 \$M	567.00 \$M
Canadian Share of Market	17.00 %	17.00 %	17.00 %	19.00 %

Cumulative 3 year export potential for
CDN products in this sector/subsector: 100+ \$M

Major Competing Countries

Market Share

SWEDEN	35.00 %
FINLAND	20.00 %
UNITED STATES OF AMERICA	15.00 %
NORWAY	5.00 %
AUSTRIA	2.00 %
UNION OF SOVIET SOC REP	2.00 %

Current Status of Canadian

exports in this sector/subsector: Well established and growing

Products/services for which there are good market prospects:

1. PULP
2. NEWSPRINT
3. KRAFTLINER

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Import duties are low
- Aggressive marketing
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada

29/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DUSSELDORF

Market: GERMANY WEST

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: CDN IND WELL ORG'D IN THIS SUB-SECTOR.

Expected Results: WE EXPECT CANADIAN INDUSTRY TO HOLD ITS MARKET SHARE

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DUSSELDORF

Market: GERMANY WEST

Sector : MINE, METAL, MINERAL PROD & SRV

Sub-Sector: MINERALS AND MINERAL PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1300.00 \$M	1250.00 \$M	1220.00 \$M	0.00 \$M
Canadian Exports	95.00 \$M	90.00 \$M	84.00 \$M	0.00 \$M
Canadian Share of Market	7.30 %	7.20 %	6.80 %	0.00 %

Cumulative 3 year export potential for
CDN products in this sector/subsector: 100+ \$M

Major Competing Countries Market Share

EUROPEAN COMMON MARKET C	17.00 %
SOUTH AFRICA	10.00 %
SOUTH AMERICA	7.00 %
COMECOM	13.00 %
UNITED STATES OF AMERICA	7.00 %
AUSTRIA	7.00 %

Current Status of Canadian
exports in this sector/subsector: Mature with little growth

Products/services for which there are good market prospects:

1. LEAD
2. COAL
3. COPPER
4. ZINC
5. TITANIUM
6. MOLYBDENUM

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada

29/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DUSSELDORF

Market: GERMANY WEST

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Market prospects have not been adequately explored
- STRONG IMPORT RESTR.
- ONLY FOR COAL

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: MAKE GRANITE PRODUCERS AWARE OF OPPORTUNITIES
Expected Results: SAMPLE ORDERS

Activity: ENCOURAGE PRODUCERS TO VISIT FRG GRANITE TRADE FAIR/89
Expected Results: ESTABLISH BUYING AND AGENCY AGREEMENTS.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DUSSELDORF

Market: GERMANY WEST

Sector : CHEM PROD & PETROCHEM,EQP,SERV

Sub-Sector: CHEM & PETROCHEM PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	13810.00 \$M	13370.00 \$M	13500.00 \$M	14000.00 \$M
Canadian Exports	52.00 \$M	56.00 \$M	60.00 \$M	68.00 \$M
Canadian Share of Market	0.38 %	0.42 %	0.44 %	0.48 %

Cumulative 3 year export potential for
CDN products in this sector/subsector: 100+ \$M

Major Competing Countries Market Share

FRANCE	15.00 %
SWITZERLAND	11.00 %
UNITED STATES OF AMERICA	10.00 %
UNITED KINGDOM	9.00 %
ITALY	4.00 %

Current Status of Canadian
exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. CLEANING CHEMICALS
2. CHEMICALS FOR PAINTS
3. CHEMICALS FOR PRINTING
4. CHEMICALS FOR PRINTED CIRCUITS

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Import duties are moderate
- Competitive pricing
- Strong sectoral capability in Canada

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Unsuitable product
- Limited appreciation/understanding of distribution system

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DUSSELDORF

Market: GERMANY WEST

For the next fiscal year, the mission is planning to undertake the following new export support initiative(s) in this sector/sub-sector:

Activity: MEETING WITH GERMAN MANUFACTURERS
Expected Results: TRANSFER TECHNOLOGY TO CANADA

IC

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DUSSELDORF

Market: GERMANY WEST

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: LEISURE PROD. TOOLS HARDWARE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	2822.00 \$M	2980.00 \$M	1536.00 \$M	0.00 \$M
Canadian Exports	12.00 \$M	11.00 \$M	6.00 \$M	0.00 \$M
Canadian Share of Market	0.40 %	0.36 %	0.45 %	0.70 %

Cumulative 3 year export potential for
CDN products in this sector/subsector: 30-60 \$M

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	3.60 %
UNITED KINGDOM	5.60 %
FRANCE	8.90 %
JAPAN	3.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. TOOLS
2. HARDWARE

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Fairs and Missions support
- Trade Fair activity
- Provincial export promotion
- CIDA programs
- Strong sectoral capability in Canada

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- INADEQUATE FOLLOW UP BY COMPANIES

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DUSSELDORF

Market: GERMANY WEST

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: CONTINUE EFFORTS IN MKTG TOOLS & HARDWARE
Expected Results: INCREASE MARKET SHARE

For the next fiscal year, the mission will carry out the following approved fairs and missions:

Activity: CDN INFO STAND AT HARDWARE FAIR, COLUGNE, MARCH 1989
Expected Results: REVIEW EXISTING MARKETING ARRANGEMENTS, EVALUATE MARKET OPPORTUNITIES, INTRODUCE NEW BUYERS/DISTRIBUTORS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DUSSELDORF

Market: GERMANY WEST

Sector : EDUCATION, MEDICAL, HEALTH PROD

Sub-Sector: HOSP. & MEDICAL EQUIP, INSTRUM.

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1724.00 \$M	1626.00 \$M	0.00 \$M	0.00 \$M
Canadian Exports	7.70 \$M	9.60 \$M	10.50 \$M	11.20 \$M
Canadian Share of Market	0.47 %	0.60 %	0.70 %	0.00 %

Cumulative 3 year export potential for
CDN products in this sector/subsector: 30-60 \$M

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	22.00 %
JAPAN	15.00 %
FRANCE	8.00 %
UNITED KINGDOM	6.00 %

Current Status of Canadian
exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. MEDICAL INSTRUMENTS
2. DENTAL INSTRUMENTS

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Trade Fair activity
- Competitive pricing
- Strong sectoral capability in Canada
- EXCELLENT FOLLOW-UP

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DUSSELDURF

Market: GERMANY WEST

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: CONTINUE EFFORTS IN MKTG HOSPITAL/MEDICAL EQPT & INSTRUMENTS
Expected Results: INCREASE MARKET SHARE

Activity: PURSUE LEADS FROM MEDICA 88
Expected Results: INTRODUCTION OF CDN COYS TO FRG MARKET.

For the next fiscal year, the mission will carry out the following approved fairs and missions:

Activity: INFO STAND AT MEDICA
Expected Results: INCREASED AWARENESS OF DISTRIBUTION NETWORK

Activity: CALLS ON MAJOR GERMAN IMPORTERS/DISTRIBUTORS
Expected Results: NEW TRADING ARRANGEMENTS. INTRODUCTION OF TRIAL ORDERS FOR NEW PRODUCTS. IC

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DUSSELDORF

Market: GERMANY WEST

Sector : INDUSTRIAL MACHIN, PLANTS, SERV.

Sub-Sector: MANUFACT & MATERIAL PLANT, EQP.

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	15700.00 \$M	14890.00 \$M	15000.00 \$M	15500.00 \$M
Canadian Exports	0.75 \$M	1.81 \$M	2.20 \$M	2.60 \$M
Canadian Share of Market	0.00 %	0.00 %	0.02 %	0.02 %

Cumulative 3 year export potential for
CDN products in this sector/subsector: 5-15 \$M

Major Competing Countries

Market Share

ITALY	8.00 %
SWITZERLAND	7.00 %
NETHERLANDS	7.00 %
UNITED STATES OF AMERICA	6.00 %
JAPAN	5.00 %
UNITED KINGDOM	5.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. PLASTIC PACKAGING MACHINERY
2. BAG MAKING MACHINERY
3. FISH PACKING MACHINERY
4. FRUIT PACKING MACHINERY

Factors contributing to current successful Canadian exports:

- Import duties are moderate
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Competitive pricing
- Strong sectoral capability in Canada
- Competitive Canadian financing
- LICENSING

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DUSSELDORF

Market: GERMANY WEST

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Restrictive standards
- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- Limited Canadian capabilities

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: MEET WITH INDUSTRY IN TERRITORY
Expected Results: BETTER AWARENESS OF CDN CAPABILITIES

Activity: MEET WITH CDN MANUFACTURERS
Expected Results: POINT OUT OPPORTUNITIES IN TERRITORY

For the next fiscal year, the mission will carry out the following approved fairs and missions:

Activity: K-SHOW'89 FOR PLASTICS
Expected Results: INCREASE EXPORTS

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: DUSSELDORF

Country: GERMANY WEST

The mission reports that the approximate flows to all countries of investment from its country/territory in Canadian \$ is as follows: (including portfolio flows if a primary focus)

	Total (\$ Million)	Canadian Share	Major Competitor Share
Current year	13533.00	3.40	50.80
One year ago	10987.00	2.40	47.70
Two years ago	10000.00	2.30	49.00

The mission is of the opinion that Canada can reasonably expect to attract the following amount of foreign investment from its territory/country next year:

233 MILLION

Canada's major competitors for investment from this territory/country are:

- U.S.A.
- GREAT BRITIAN
- NETHERLANDS
- FRANCE
- BELGIUM
- LUXEMBURG

The following types of activities are currently being undertaken by Canada's major competitors to attract investment from this territory/country:

- NATIONAL ADVERTISING CAMPAIGNS
- SEMINARS
- NATIONAL PRESENTATIONS AT FAIRS
- DIRECT MAIL CAMPAIGNS AND CALLS BY NATIONAL, REGIONAL AND MUNICIPAL PROMOTERS

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RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: DUSSELDORF

Country: GERMANY WEST

Compared to major competitive destinations, Canada is perceived to have the following advantages:

- F.T.A.
- LAW AND ORDER
- EUROPEAN ATMOSPHERE
- POLITICAL STABILITY
- SECURE RAW MATERIAL BASE

the following constraints:

- STRONG IMAGES OF U.S.A.
- PREFERENCE FOR EEC COUNTRIES
- COLD CLIMATE
- SMALL MARKET
- ABSENCE OF NEWS ON CANADA

The mission indicates the following potential for various types of investment from within its territory/country:

Type of Investment	Potential
Portfolio	LOW
Acquisition	HIGH
Greenfield	HIGH
Joint Venture	MEDIUM
Strategic Partnering	LOW
Technology Licensing	MEDIUM

The mission believes that the following sectors are of greatest interest to investors in its territory/country with an assigned ranking of 1-10:

Sector	Ranking
Agriculture/Food/Fish	6
Resource Processing	3
Machinery and Equipment	1
Transportation	2
Consumer Products	8
Commercial Service	10
Computer and Communications	4
Health Care Products/Medical	7
Aerospace and Defence	5
Strategic Technologies	9

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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: DUSSELDORF

Country: GERMANY WEST

The mission has proposed the following investment promotion activities for the next fiscal year:

Date

Type: COMMUNICATIONS EXHIBIT

INVESTMENT EXHIBIT AT KARLSRUHE TRADE SHOW

9/89

Location:

Invest Nature: TECH. LICENSING
JOINT VENTURE

Sector: FOREST PRODUCTS, EQUIP, SERVICES

Cooperants: VERBAND HOLZUND KUNSTSTOFFVERARBEITUNG

Estimated Budget: \$8,000.00

Type: MISSION OUT, INDUSTRY

MISSION OF CDN MANUF. OF PLASTIC PRODUCTION EQUIPMENT TO K-SHOW 89

11/89

Location: DUSSELDORF

Invest Nature: JV

TECH LICENSING

Sector: INDUSTRIAL MACHIN, PLANTS, SERV.

Cooperants: VDMA

Estimated Budget: \$2,000.00

Type: SEMINAR, ABROAD

TAILORED INVESTMENT SEMINARS FOR REGIONAL AUDIENCES

10/89

Location: SAARBRUCKEN, LUDWIG.

Invest Nature: JV

ACQUISITION

TECH LICENSING

Sector: INDUSTRIAL MACHIN, PLANTS, SERV.

Cooperants: IHK

Estimated Budget: \$4,000.00

Type: MISSION IN, TO INDUSTRY

GERMAN INVESTMENT IN CDN HYDRAULICS PRODUCTION

5/89

Location:

Invest Nature: JOINT VENTURE

AQUISITION

Sector: INDUSTRIAL MACHIN, PLANTS, SERV.

Cooperants: VDMA

Estimated Budget: \$6,000.00

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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: DUSSELDORF

Country: GERMANY WEST

Date

Type: MISSION IN, TO INDUSTRY

GERMAN INVESTMENT INDUSTRIES REMANUFACTURING FACILITY

11/89

Location:

Invest Nature: GREENFIELD

JOINT VENTURE

Sector: FOREST PRODUCTS, EQUIP, SERVICES

Cooperants: INDIVIDUAL COMPANIES, INDIVIDUALS

Estimated Budget: \$6,000.00

Total estimated budget for all proposals:

\$26,000.00

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Post : DUSSELDORF

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Post/Contact</u>
89/04/08	EQUITANA, ESSEN, FRG INFO BOOTH, ONLY	AGRI & FOOD PRODUCTS & SERVICE MCCALLUM/SCHROETER
89/05/20	BERGBAU'89 - MINING EQUIP. EXH. DUESSELDORF, FRG INFO BOOTH, ONLY	MINE, METAL, MINERAL PROD & SRV MCCALLUM/SCHROETER
89/09/00	BUYERS MISSION TO WORLD ENERGY CONFERENCE, MONTREAL MISSION IN, TO FAIR	POWER & ENERGY EQUIP & SERV.
89/10/14	ANUGA INT'L FOOD FAIR, COLOGNE, FRG FAIR, NATIONAL STAND	AGRI & FOOD PRODUCTS & SERVICE H. SCHROETER/A. ADAMS
89/11/02	KUNSTOFF (K'89), DUESSELDORF. F.R.G. FAIR, NATIONAL STAND	INDUSTRIAL MACHIN, PLANTS, SERV H. SCHROETER/G. COTE
89/11/22	MEDICA, DUESSELDORF, FRG INFO BOOTH, ONLY	EDUCATION, MEDICAL, HEALTH PROD WATERFALL/SCHROETER
90/02/00	CONSTRUCTA, HANNOVER, FRG INFO BOOTH, ONLY	CONSTRUCTION INDUSTRY
90/02/13	DUMOTEKNIKA - HOUSEWARES EXH., COLOGNE, FRG INFO BOOTH, WITH GROUP	CONSUMER PRODUCTS SCHROETER/WATERFALL
90/03/00	3RD COUNTRY CO-OP PROJECTS IN-COMING MISSION MISSION IN, TO INDUSTRY	GENERAL OR UNASSIGNED ISB
90/03/04	IGEDO - INT'L FASHION FAIR, DUESSELDORF, F.R.G. INFO BOOTH, ONLY	CONSUMER PRODUCTS

RPT81

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: MUNICH

Country: GERMANY WEST

THE FRG IS THE DOMINANT ECONOMY IN EUROPE. ALTHOUGH PLAGUED BY STRUCTURAL RIGIDITIES AND HIGH UNEMPLOYMENT RATE, THE ECONOMY GREW BY A SURPRISING RATE OF 3.5 PERCENT IN 1988 AND INFLATION WAS HELD AT A VERY LOW RATE IN THE RANGE OF ONE TO TWO PERCENT. GROWTH IN 1989 IS EXPECTED TO MODERATE TO ABOUT TWO PERCENT. IN THE ABSENCE OF ANY MAJOR RESOURCE ENDOWMENTS (OTHER THAN COAL), THE ECONOMY RELIES ON MANUFACTURING HIGH QUALITY TECHNOLOGICALLY ADVANCED PRODUCTS DEVELOPED AGAINST THE BACKGROUND OF A SERIOUS COMMITMENT TO RESEARCH AND TECHNOLOGY DEVELOPMENT BY THE PRIVATE SECTOR AND ALL LEVELS OF GOVERNMENT.

2. THE FRG MARK IS THE STRONGEST CURRENCY WITHIN THE EUROPEAN MONETARY SYSTEM AND, ALTHOUGH IT HAS RECENTLY MODERATED, IT IS STRONG AGAINST THE DOLLAR. HOWEVER, THIS HAS NOT IMPAIRED THE COUNTRY'S ABILITY TO ACCUMULATE HUGE TRADE SURPLUSES. GERMANY REMAINS THE WORLD'S LARGEST EXPORTER WITH A SURPLUS OF \$ US 45 BILLION; IT IS ALSO THE WORLD'S SECOND LARGEST IMPORTER AND IT IS ENCOURAGING TO NOTE THAT IMPORTS HAVE BEEN RISING FASTER THAN EXPORTS RECENTLY. THE FRG IS CANADA'S FOURTH LARGEST EXPORT MARKET TAKING CDN \$ 1.8 BILLION WORTH OF PRODUCT IN 1988.

3. AGAINST THIS BACKGROUND, THE FRG PRESENTS AN IDEAL EXPORT MARKET AND INVESTMENT AND SCIENCE AND TECHNOLOGY SOURCE FOR CANADA. OUR RESOURCES ARE AND ALWAYS WILL BE IN HIGH DEMAND; OUR SEMI- AND FULLY-MANUFACTURED EXPORTS WHICH HAVE BEEN GROWING RECENTLY ARE BECOMING INCREASINGLY COMPETITIVE DUE TO THE DIRECTION OF CURRENT EXCHANGE RATES; AS THE FRG REMAINS ON THE LEADING EDGE OF APPLYING THE RESULTS OF RESEARCH AND TECHNOLOGICAL DEVELOPMENT TO INDUSTRIAL APPLICATIONS, OUR FIRMS CAN LEARN AND ACQUIRE THESE APPLICATIONS TO INCREASE AND DIVERSIFY OUR OWN INDUSTRIAL OUTPUT; CAPITAL CONTINUES TO FLOW OUT OF THE FRG AND WITH THE ACCESS TO THE USA MARKET RESULTING FROM THE FTA, CANADA WILL BE AN ATTRACTIVE LOCATION FOR INVESTMENT; THE STRONG MARK AND GERMAN PROPENSITY FOR TRAVEL PRESENT EXCELLENT OPPORTUNITIES TO ENCOURAGE TOURISM.

4. WITHIN THIS ENVIRONMENT OUR PRIMARY OBJECTIVE IN THE COMING YEAR WILL BE TO IDENTIFY TRADE AND INVESTMENT OPPORTUNITIES IN THE AUTOMOTIVE, TELECOMMUNICATIONS, COMPUTERS AND SOFTWARE (INCLUDING ROBOTICS), AND SPORTING EQUIPMENT SECTORS.

IN THE AUTOMOTIVE SECTOR WE WILL CONTINUE TO ENCOURAGE THE LARGE GERMAN MANUFACTURERS TO TAKE ADVANTAGE OF THEIR DUTY REMISSION MOU'S. OUR EMPHASIS, HOWEVER, WILL NOW SHIFT TO DAIMLER-BENZ AND VW. IN THE TELECOMMUNICATIONS SECTOR WE WILL WORK TO TAKE ADVANTAGE OF THE LOOSENING OF BUNDESPOST CONTROLS OVER MODEMS AND MOBILE TELEPHONES. THIS WILL BE A CONTINUATION OF WORK STARTED IN FY 88/89. ADVANCES IN THE COMPUTER AND SOFTWARE MARKET WILL BE DIFFICULT AS THE COMPETITION FROM LARGE LOCAL AND FOREIGN (PRIMARILY US) FIRMS IS FIERCE. NEVERTHELESS THERE ARE NICHE OPPORTUNITIES WHICH WE WILL CONTINUE TO ASSIST CANADIAN FIRMS TO EXPLOIT. OUR APPROACH TO THE SPORTING GOODS SECTOR WILL BE A CONTINUATION OF CURRENT PROJECTS I.E. A PUSH FOR GREATER VISIBILITY IN THE GERMAN MARKET AND, AT THE SAME TIME, THE ACCEPTANCE AND EDUCATION OF

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RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: MUNICH

Country: GERMANY WEST

CANADIAN FIRMS AS TO WHAT IT TAKES TO BE SUCCESSFUL. THE AEROSPACE SECTOR REMAINS UNSETTLED AS IT IS UNCLEAR WHAT IT WILL LOOK LIKE FOLLOWING THE EXPECTED TAKEOVER OF MBB BY DAIMLER. OUR TECHNOLOGY TRANSFER/INVESTMENT ATTENTION WILL CONTINUE TO BE FOCUSED ON MEDICAL EQUIPMENT AND ADVANCED STRENGTHEN OUR TRADE PROMOTION EFFORTS USING OUR NEWLY INSTALLED WIN SYSTEM, A HIGHLY FOCUSED OUTCALL PROGRAM AND SHORT DURATION "MINI SOLO" SHOWS HELD IN MAJOR CENTRES IN OUR TERRITORY.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 EXPORT PROMOTION PRIORITIES

Mission: MUNICH

Country: GERMANY WEST

The Mission selected the following sectors as priority areas for export promotion activities for the coming fiscal year for the stated reason:

1. TRANSPORT SYS,EQUIP,COMP,SERV.

THE AUTOMOBILE INDUSTRY IN THE FRG IS VERY LARGE, DYNAMIC, TECHNICALLY ADVANCED AND INCLINED TO BUY IN NORTH AMERICA TO KEEP COSTS LOW AND TO HAVE A MEANS OF PROTECTING ITS ACCESS TO THE MARKET, BMW, DB AND VW HAVE DUTY REMISSION ORDERS AND FURTHER INCENTIVES TO BUY CANADIAN.

2. ADVANCED TECH. PROD. & SERV

THE LARGE GERMAN (AND OTHER EUROPEAN) TELECOMMS MARKETS ARE OPENING UP AS STATE MONOPOLIES RELAX THEIR GRIPS. THIS IS A FIELD IN WHICH CANADA LED BY NORTEL IS STRONG AND DIVERSIFIED ENOUGH TO COMPETE WITH OTHER FOREIGN SUPPLIERS.

3. ADVANCED TECH. PROD. & SERV

CANADIAN FIRMS TECHNOLOGICALLY ASSOCIATED WITH US FIRMS AMONG MOST ADVANCED IN FIELD. GERMAN FIRMS AND CONSUMERS COMMITTED TO TECHNOLOGICAL ADVANCEMENT ARE ANXIOUS TO HAVE HIGH PERFORMANCE PRODUCTS PRODUCED BY CDN COYS.

4. CONSUMER PRODUCTS & SERVICES

THE CANADIAN SPORTING GOODS INDUSTRY IS GRADUALLY BUILDING A FOLLOWING IN THE FRG BASED ON CONTINUED PARTICIPATION AT ISPO. ALTHOUGH COMPETITION IS TOUGH, IT IS FREE OF MANY OF THE NTB'S THAT HAMPER OUR SUCCESS IN MORE EXOTIC SECTORS.

The most important current Canadian export sectors to this market are (based on actual export sales):

1. TRANSPORT SYS,EQUIP,COMP,SERV.
2. ADVANCED TECH. PROD. & SERV
3. ADVANCED TECH. PROD. & SERV

4. CONSUMER PRODUCTS & SERVICES

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MUNICH

Market: GERMANY WEST

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: TELECOM, DATACOM, SAT, SPACECOM

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1210.00 \$M	1800.00 \$M	1700.00 \$M	1800.00 \$M
Canadian Exports	21.20 \$M	31.00 \$M	31.00 \$M	35.00 \$M
Canadian Share of Market	1.70 %	1.70 %	1.80 %	1.90 %

Cumulative 3 year export potential for
CDN products in this sector/subsector: 100+ \$M

Major Competing Countries Market Share

JAPAN	35.00 %
UNITED STATES OF AMERICA	13.00 %
FRANCE	12.00 %
NETHERLANDS	7.00 %
UNITED KINGDOM	5.00 %
ITALY	5.00 %

Current Status of Canadian
exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. DATA TELECOMMUNICATIONS
2. ISDN PRODUCTS
3. MOBILE RADIO
4. FIBRE OPTICAL EQUIPMENT

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Provincial export promotion
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MUNICH

Market: GERMANY WEST

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Restrictive standards
- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- Performance of local agent or representative

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: SUPPORT BCE MOBILE TO FIND SUITABLE JOINT VENTURE.
Expected Results: ESTABLISH BCE MOBILE AS A JOINT VENTURE PARTNER OF GERMAN CO TO PARTICIPATE IN THE NEW GERM.PRIV.CELLULAR RADIO NETWORK

For the next fiscal year, the mission will carry out the following approved fairs and missions:

Activity: CEBIT'89, HANNOVER
Expected Results: INTRODUCTION OF 10 NEW CANADIAN COMPANIES TO GERMAN MARKET

For the next fiscal year, the mission is planning to undertake the following new export support initiative(s) in this sector/sub-sector:

Activity: SUPPORT CDN CO. TO ESTABLISH OFFICE IN FRG
Expected Results: OPENING OF SALES OFFICE IN FRG.

Activity: ARRANGE MINI SOLD SHOW TO PRESENT CDN TELECOM CAPABILITIES
Expected Results: INTRODUCTION OF 6 NEW CDN COMPANIES TO FRG MARKET

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MUNICH

Market: GERMANY WEST

Sector : ADVANCED TECH. PRDD. & SERV

Sub-Sector: COMPUTERS HARD/SOFTWARE & COMP

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	8300.00 \$M	10400.00 \$M	9700.00 \$M	10300.00 \$M
Canadian Exports	19.50 \$M	28.00 \$M	32.00 \$M	39.00 \$M
Canadian Share of Market	0.21 %	0.27 %	0.33 %	0.40 %

Cumulative 3 year export potential for
CDN products in this sector/subsector: 100+ \$M

Major Competing Countries Market Share

UNITED STATES OF AMERICA	23.00 %
FRANCE	16.00 %
JAPAN	12.00 %
ITALY	11.00 %
UNITED KINGDOM	7.00 %
IRELAND	6.00 %

Current Status of Canadian
exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. DATA COMMUNICATION
2. SOFTWARE
3. PC-NETWORKING
4. PC-ADD-ON PRODUCTS
5. OFFICE AUTOMATION
6. CAD/CAM/CIM

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Provincial export promotion
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MUNICH

Market: GERMANY WEST

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored
- Performance of local agent or representative

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: SUPPORT CDN CO. TO ESTABLISH SOFTWARE J.V. WITH NIXDORF.
Expected Results: JOINT VENTURE.

Activity: MICROELECTRONIC MISSION TO CEBIT TO SUPPORT DRIE.
Expected Results: INTRODUCTION OF 6 NEW COMPANIES TO POTENTIAL J.V.PARTNERS

For the next fiscal year, the mission will carry out the following approved fairs and missions:

Activity: CEBIT'89, HANNOVER
Expected Results: INTRO. OF 7 NEW COMPANIES TO FRG

Activity: SYSTEMS'89, MUNICH
Expected Results: INTRO. OF 5 NEW COMPANIES TO FRG

For the next fiscal year, the mission is planning to undertake the following new export support initiative(s) in this sector/sub-sector:

Activity: SOFTWARE MISSION FROM QUEBEC
Expected Results: INTRODUCTION OF 6 NEW COMPANIES TO FRG MARKET

Activity: SUPPORT PROD DEMO OF COMPUTER HARD/SOFTWARE
Expected Results: INTRODUCTION OF NEW CDN PRODUCTS TO FRG MARKET

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MUNICH

Market: GERMANY WEST

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: AUTOMDTIVE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	4328.00 \$M	4760.00 \$M	5120.00 \$M	5510.00 \$M
Canadian Exports	36.20 \$M	128.00 \$M	160.00 \$M	190.00 \$M
Canadian Share of Market	0.84 %	2.69 %	3.13 %	3.45 %

Cumulative 3 year export potential for
CDN products in this sector/subsector: 100+ \$M

Major Competing Countries Market Share

FRANCE	28.00 %
ITALY	13.00 %
UNITED KINGDOM	13.00 %
UNITED STATES OF AMERICA	8.00 %
AUSTRIA	7.00 %
BENELUX COUNTRIES	6.50 %

Current Status of Canadian
exports in this sector/subsector: Well established and growing

Products/services for which there are good market prospects:

1. CATALYTIC CONVERTERS
2. ELECTRIC MOTORS
3. ALUMINUM WHEELS
4. CLUTCHES
5. SEAT BELTS
6. GLASS (WINDSHIELDS)
7. ELECTRONIC IN GENERAL
8. COMPLETE RUBBER SEALING SYSTEMS
9. NEW PRODUCT WITH TECHNOLOGICAL ADVANTAGE FOR O.E.M

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MUNICH

Market: GERMANY WEST

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Trade Fair activity
- Competitive pricing
- Strong sectoral capability in Canada
- Bilateral economic trade agreement

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- Limited Canadian capabilities
- VERY HIGH GERMAN TECH STAND /QUAL
- NO J.I.T.SUPPL POSS DUE TO DISTANCE

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: ASSIST CDN CD TO GAIN TUV APPROV & INTRODUCE PRODUCT.
Expected Results: A) TUV APPROVAL
B) SALES T.B.A.

Activity: LOBBY VW TO TRANSFER DIE CASTING TO CANADA.
Expected Results: CREATION OF UP TO 500 JOBS IN CANADA. SALES COULD REACH \$50M

Activity: ASSIST CDN CD TO PROMOTE BRAZING SYSTEM.
Expected Results: INCREASE SALES. ASSURE POSITION OF FRG MARKET.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MUNICH

Market: GERMANY WEST

For the next fiscal year, the mission is planning to undertake the following new export support initiative(s) in this sector/sub-sector:

- Activity: I.A.A. SHOW IN FRANKFURT
Expected Results: PROMOTE OEM CANADIAN CAPABILITIES
- Activity: ORGANIZE AUTO PARTS SALES MISSIONS.
Expected Results: INCREASE CANADIAN SALES IN THE FRG.
- Activity: PROVIDE GUIDE ON HOW TO ACCESS FRG AUTO MFGRS.
Expected Results: PROVIDE CANADIAN INDUSTRY WITH AN EFFECTIVE TOOL THEY CAN USE IN APPROACHING & DEALING WITH FRG CAR MFGRS.
- Activity: THE GERMAN AUTO IND 1992. SUGGESTIONS ON HOW TO APPROACH IT
Expected Results: PROVIDE INFO ON POSSIBLE AFFECT 1992 ON FRG AUTO INDUSTRY.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MUNICH

Market: GERMANY WEST

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: AEROSPACE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	6000.00 \$M	7100.00 \$M	6400.00 \$M	6500.00 \$M
Canadian Exports	35.00 \$M	30.00 \$M	65.00 \$M	78.00 \$M
Canadian Share of Market	0.60 %	0.40 %	1.00 %	1.20 %

Cumulative 3 year export potential for
CDN products in this sector/subsector: 100+ \$M

Major Competing Countries

Market Share

FRANCE	47.00 %
UNITED STATES OF AMERICA	24.00 %
UNITED KINGDOM	16.00 %
ITALY	2.00 %
NETHERLANDS	2.00 %

Current Status of Canadian
exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. AIRPLANES
2. ENGINES
3. SYSTEMS AND SUB-SYSTEMS

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Trade Fair activity
- Provincial export promotion
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MUNICH

Market: GERMANY WEST

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: INTROD. OF MICROWAVE LANDING SYST TO FRG AIRPORTS.
Expected Results: OPENING MARKET FOR MICROWAVE LANDING SYSTEMS.

For the next fiscal year, the mission is planning to undertake the following new export support initiative(s) in this sector/sub-sector:

Activity: REPORT ON GERMAN AEROSPACE MARKET
Expected Results: INFORMATION ON STRUCTURE OF FRG AEROSPACE MARKET AND POTENTIAL FOR CANADIAN EXPORTERS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MUNICH

Market: GERMANY WEST

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: LEISURE PROD. TOOLS HARDWARE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	2040.00 \$M	2120.00 \$M	2250.00 \$M	2410.00 \$M
Canadian Exports	3.46 \$M	4.10 \$M	5.20 \$M	6.10 \$M
Canadian Share of Market	0.17 %	0.19 %	0.23 %	0.26 %

Cumulative 3 year export potential for
CDN products in this sector/subsector: 15-30 \$M

Major Competing Countries

Market Share

ITALY	24.00 %
TAIWAN	9.00 %
AUSTRIA	8.00 %
FRANCE	6.50 %
HONG KONG	4.50 %
SCANDINAVIA	4.10 %

Current Status of Canadian
exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. WINTERSPORT EQUIPMENT
2. FITNESS EQUIPMENT
3. CAMPING EQUIPMENT
4. GOLF EQUIPMENT
5. TREKKING EQUIPMENT
6. WATER SPORT EQUIPMENT

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- PEMD support
- Fairs and Missions support
- Trade Fair activity
- Competitive pricing
- Strong sectoral capability in Canada
- CANADA WELL KNOWN FOR
- SKATING AND HOCKEY EQUIP-
- MENT

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MUNICH

Market: GERMANY WEST

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- POOR FOLLOW UP AFTER FAIRS & BUSI-
- NESS CONTACTS -DELIVERY PROBLEMS

In support of Canadian exports in this sector/sub-sector the mission is currently engaged in activities which include:

Activity: ORGANIZE BUYERS MISSION TO VISIT CEGA SHOW AND INDUSTRY
Expected Results: NEW BUYING CONNECTIONS AND DRAW BUYERS ATTENTION TO CANADIAN POTENTIAL

For the next fiscal year, the mission will carry out the following approved fairs and missions:

Activity: ISPO (SPRING)
Expected Results: SALES ON SITE, NEW BUYING CONNECTIONS, HIRING OF NEW DISTRIBUTORS, DRAW ATTENTION OF TRADE PEOPLE TO CANADIAN POTENTIAL

Activity: ISPO (FALL)
Expected Results: ON SITE SALES, NEW BUYING CONNECTIONS, ETC.

For the next fiscal year, the mission is planning to undertake the following new export support initiative(s) in this sector/sub-sector:

Activity: NUERNBERG TOY FAIR: FEDERAL INFO BOOTH
Expected Results: DRAW ATTENTION OF BUYING ORGANIZATION TO CANADIAN CAPABILITIES.

Activity: GET TOY FAIR AUTH. TO ACCEPT CDN PRIVATE SECTOR EXHIBITS.
Expected Results: GIVE CANADIAN COMPANIES OPPORTUNITY TO APPROACH EUROPEAN MARKET

Activity: REPORT ON FRG SPORTING GOODS STANDARDS.
Expected Results: GIVE CDN COMPANIES INFO ON THE BEST APPROACH TO THE FRG MARKET FROM A REGULATIONS AND NORMS POINT OF VIEW

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RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: MUNICH

Country: GERMANY WEST

The mission reports that the approximate flows to all countries of investment from its country/territory in Canadian \$ is as follows: (including portfolio flows if a primary focus)

	Total (\$ Million)	Canadian Share	Major Competitor Share
Current year	13533.00	3.40	50.80
One year ago	10987.00	2.40	47.70
Two years ago	10000.00	2.30	49.00

The mission is of the opinion that Canada can reasonably expect to attract the following amount of foreign investment from its territory/country next year:

233 MILLION

Canada's major competitors for investment from this territory/country are:

- U.S.A.
- GREAT BRITIAN
- NETHERLANDS
- FRANCE
- BELGIUM/LUXEMBURG
- SWITZERLAND

The following types of activities are currently being undertaken by Canada's major competitors to attract investment from this territory/country:

- NATIONAL ADVERTISING CAMPAIGNS
- SEMINARS
- NATIONAL PRESENTATIONS AT FAIRS
- DIRECT MAIL CAMPAIGNS AND CALLS BY NATIONAL, REGIONAL AND MUNICIPAL PROMOTERS

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: MUNICH

Country: GERMANY WEST

Compared to major competitive destinations, Canada is perceived to have

the following advantages:

- F.T.A.
- LAW AND ORDER
- EUROPEAN ATMOSPHERE
- POLITICAL STABILITY
- SECURE RAW MATERIAL BASE

the following constraints:

- STRONG IMAGES OF U.S.A.
- PREFERENCE FOR EEC COUNTRIES
- CANADA'S COLD CLIMATE
- CANADA'S SMALL MARKET
- ABSENCE OF NEWS ON CANADA

The mission indicates the following potential for various types of investment from within its territory/country:

Type of Investment	Potential
Portfolio	LOW
Acquisition	HIGH
Greenfield	HIGH
Joint Venture	MEDIUM
Strategic Partnering	LOW
Technology Licensing	MEDIUM

The mission believes that the following sectors are of greatest interest to investors in its territory/country with an assigned ranking of 1-10:

Sector	Ranking
Machinery and Equipment	5
Transportation	1
Computer and Communications	4
Health Care Products/Medical	2
Aerospace and Defence	6
Strategic Technologies	3

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RPTDZ

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABOARD

Mission: MUNICH

Country: GERMANY WEST

The mission has proposed the following investment promotion activities for the next fiscal year:

	Date
Type: MISSION OUT, INDUSTRY	
AIMED AT TIER I & II OEM (AUTO) SUPPLIES	10/89
Location: STUTTGART	
Invest Nature: GREENFIELD	
JOINT VENTURE	
Sector: DEFENCE PROGRAMS, PRODUCTS, SERV	
Cooperants: INDIVIDUAL COMPANIES	
Estimated Budget: \$5,000.00	
Type: DIRECT MAIL CAMPAIGN	
MICRO-ELECTRONICS INVESTMENT EXHIBIT	2/90
Location: MUNICH, FRANKFURT	
Invest Nature: JOINT VENTURE	
STRATEGIC PART.	
TECH. LICENSING	
Sector: DEFENCE PROGRAMS, PRODUCTS, SERV	
Cooperants: INDIVIDUAL COMPANIES	
Estimated Budget: \$10,000.00	
OPTO-ELECTRONICS	6/89
Location:	
Invest Nature: VARIOUS	
Sector: MINE, METAL, MINERAL PRD & SRV	
Cooperants: INDIVIDUAL COMPANIES	
Estimated Budget: \$4,000.00	
MULTISECTOR EVENT TO INITIATE MORE SPECIFIC WORK IN NUERNBERG AREA	11/89
Location: NUERNBERG	
Invest Nature: GREENFIELD	
JOINT VENTURE	
TECH. LICENSING	
Sector: DEFENCE PROGRAMS, PRODUCTS, SERV	
Cooperants: INDIVIDUAL COMPANIES	
Estimated Budget: \$3,000.00	

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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABRDAD

Mission: MUNICH

Country: GERMANY WEST

Date

Type: OUTCALL PROGRAM

CONTINUATION WRAP-UP OF FY 88/89 PROJECT

4/89

Location:

Invest Nature: JOINT VENTURE

STRATEGIC PART.

TECH. LICENSING

Sector: TRANSPORT SYS,EQUIP,COMP,SERV.

Cooperants: INDIVIDUAL COMPANIES

Estimated Budget: \$2,000.00

Total estimated budget for all proposals:

\$24,000.00

Post : MUNICH

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Post/Contact</u>
89/04/10	BAUMA'89 (BUILDING & CONSTRUCTION SHOW), MUNICH, F.R.G. INSTITUTIONAL EXHIBIT	CONSTRUCTION INDUSTRY H.SCHRÖETER
89/09/06	ISPO FALL, MUNICH, FRG FAIR, NATIONAL STAND	CONSUMER PRODUCTS G.COTE/D.ADAMS
89/09/15	INTERNATIONAL MOTOR SHOW F.R.G. INFO BOOTH, ONLY	TRANSPORT SYS, EQUIP, COMP, SERV. H.SCHRÖETER/G.COTE
89/10/16	SYSTEMS'89 - COMPUTER SHOW, MUNICH, FRG FAIR, NATIONAL STAND	ADVANCED TECH. PROD. & SERV D.ADAMS/H.SCHRÖETER
90/02/22	ISPO SPRING - SPORTING GOODS, MUNICH, FRG FAIR, NATIONAL STAND	CONSUMER PRODUCTS G.COTE/D.ADAMS
90/03/21	CEBIT'90 - COMPUTER SHOW, HANNOVER, FRG FAIR, NATIONAL STAND	ADVANCED TECH. PROD. & SERV

