Canadian EXCELLENCE 1997

- TRANSPORTATION
- ENERGY AND NATURAL RESOURCES
- CONSTRUCTION AND BUILDING PRODUCTS
- TELECOMMUNICATIONS AND INFORMATION TECHNOLOGIES
- FINANCIAL INSTITUTIONS
- AGRI-FOOD
- ENVIRONMENTAL INDUSTRIES
- EDUCATION, ARTS AND CULTURE

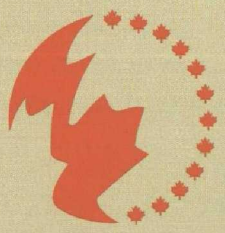
Canada

Canadian

EXCELLENCE

Canadians have built a powerful, modern economy. We are connected by steel and micro-fibre, asphalt and satellites. We are united by a determination to forge stronger international trade and investment partnerships. Canadian governments and our business community are working as Team Canada to ensure that Canadian excellence meets international requirements.

Jean Chrétien
PRIME MINISTER OF CANADA



Team Canada • Équipe Canada

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Message from the Prime Minister of Canada

As Prime Minister of Canada, I have had the privilege of travelling around the world and seeing many countries using Canadian products and services. It always fills me with pride knowing that Canadian quality is recognized internationally and that our creativity and innovation are changing the way nations approach new challenges.

Canadian companies are world leaders in a wide variety of fields. Our products and services are world class and cost competitive, due in no small part to a qualified and educated work force. As well, Canadian products must meet some of the most demanding standards on the face of the planet — our own.

Canada is the world's largest exporter of minerals, metals and forest products. While exploring and developing these important natural resources across this vast land, Canadians have developed leading-edge transportation technologies - from railway cars and systems to highways and bridges - from shipbuilding to passenger aircraft. We even move payloads around in outer space! As well, our immense oil, gas and water reserves have proven to be fertile sites for developing environmentally friendly methods of producing safe and abundant energy.

Canadian communications companies are also world leaders, whether providing telephone systems, laying down the fibre optics necessary to travel on the information superhighway or providing remote sensing or weather satellite images from above the planet. Our telecommunications networks and computer software are unsurpassed in their capacity to move and process information: the lifeblood of today's global economy.

Canada is also a place where you will discover many different types of food to tempt your palate. In food production and processing, Canadian firms span the market, from breeding stock and cooking oils to smoked salmon and ice wine. As well, the city of Saskatoon, in the Canadian prairies, has become a world centre for agricultural biotechnology.

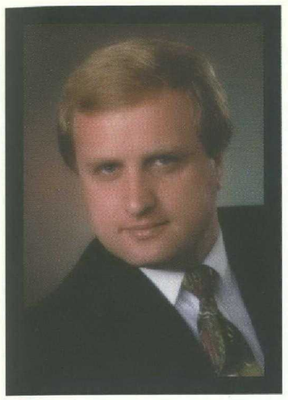
Reading this book you will discover that Canada can provide products and services ranging from food for your plate to food for your mind. We can help you build your economy and cities, we can sell you energy or help you tap your own. Our world class financial institutions, including the Export Development Corporation, offer some of the most sophisticated trade finance services available to business and can lend you the money to buy capital goods and services from Canada.

Sample our culture, fine arts, products and services and you will no doubt find yourself returning often to Canadian excellence.

The Right Honourable Jean Chrétien

Prime Minister of Canada

Team Canada • Équipe Canada



MESSAGE FROM THE MINISTER FOR INTERNATIONAL TRADE

When you consider that exports account for 40 percent of Canada's gross domestic product, it is clear that Canadian businesses are succeeding every day in international markets. Indeed, the World Economic Forum ranks Canada fourth in the world for international competitiveness, up from eighth last year.

Canadian Excellence is a testimony to the capabilities and competitiveness that we have to offer the world in such sectors as transportation; energy and natural resources; telecommunications and information technologies; construction and building products; financial services; agri-food; environment; and education, arts and culture.

Canadian firms have consistently demonstrated creativity and versatility in their approaches to international challenges. They have the willingness to adapt their goods and services to satisfy the needs of their customers, to transfer technology, and to form strategic alliances. As you read through this book, consider what your business could achieve by teaming up with a Canadian company. Consider tapping our expertise and making use of our know how.

All you need do is contact one of our Canadian Trade Commissioners who work in more than 125 locations around the world. They can help you identify and contact potential Canadian partners, and assist you in meeting your business goals.

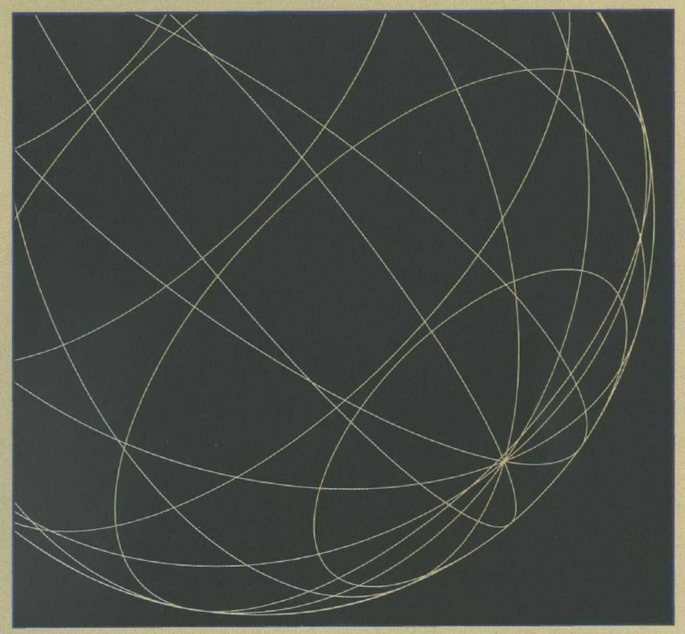
Canada is not only a good business partner; it is also an excellent place to invest, offering one of the most open and competitive business environments in the world and a gateway to the lucrative North American market. In fact, according to a recent KPMG cost-comparison study involving five European countries and the United States, Canada ranked number one as the least expensive place to establish a new business facility.

With combined merchandise and services exports of over $300 billion in 1996, you could say that Canada is leaving its mark on trade and that Canadian excellence is our trademark.

Sergio Marchi

The Honourable Sergio Marchi

MINISTER FOR INTERNATIONAL TRADE



Introduction

CANADIAN EXCELLENCE IS ABOUT THE advanced and productive industries that exist in Canada, and the dedication, knowledge and skill that Canadians apply to these industries.

Canada has an open economy that has long been geared toward trade with the rest of the world. It leads the Group of Seven (G-7) industrialized economies in trade as a share of gross domestic product (GDP). In 1996, Canadian exporters produced a record trade surplus of $34 billion — a 20 percent increase over 1995. Canada now exports 40 percent of everything it produces.

As a member of the North American Free Trade Agreement with the United States and Mexico, Canada has preferred access to the world's richest and second-largest trade zone, with over 386 million consumers. Canada has also negotiated free trade agreements with Israel and Chile. As well, Canada is actively part of ongoing efforts to expand trade in Asia Pacific, with the European Union, and in the western Hemisphere.

Canada is one of the most developed economies and one of the wealthiest countries in the world. For the last four years, the United Nations ranked Canada as the best place in the world to live in terms of quality of life. And the International Monetary Fund predicted that Canada will lead economic growth in the G-7 in 1997 and 1998.

The federal government's fiscal policies have successfully addressed budget deficits and public debt. As a result, the annual federal deficit has slipped below 2 percent of GDP, and inflation has settled at a respectable 1.5 percent. Canada will soon be soon the only G-7 country to have eliminated central government financial requirements. The federal government is scheduled to balance its budget no later than fiscal year 1998-99.

Canada offers one of the most advantageous business climates in the world. A well- educated and highly skilled labour force, particularly in advanced technologies, combined with one of the most supportive R&D environments in the world, has reinforced international investment confidence, which is at its highest level in 15 years. Foreign direct investment in Canada has almost doubled in 10 years, exceeding $180.3 billion in 1996.

Canada also possesses an extremely sophisticated and efficient infrastructure. In transportation, it is ranked as the second best in the G-7, with rail, truck and air services fully integrated with U.S. networks. And with the information highway operating smoothly, and the second highest ratio of computers per capita among the G-7 countries, Canada is fully equipped to embrace the new "digital economy."

One of Canada's greatest assets is its enviable reputation in leading-edge technologies. With its small and scattered population and vast geographical distances, Canada has long been a pioneer in telecommunications. It has arguably the most modern telephone system in the world, and is home to some of the world's most innovative telecommunications companies.

Add to this abundant natural resources and low-cost energy supplies, safe, clean and modern cities, a highly regarded legal system that ensures transparency and the rule of law, low-cost educational services and universal health care, and it would be difficult to find a better business and investment partner than Canada.

Transportation

The first bond of Canadian nationhood was a transcontinental railway built across this huge and rugged country late in the 19th century. Since then, efficient, reliable transportation has been a priority. To be competitive, Canadians have had to develop transportation systems and vehicles that move people and goods quickly, inexpensively and safely, over long distances, in all kinds of weather.

Necessity has created first-rate capability. Canada now has more kilometres of road and railway track per person than do most other countries, including the United States. Intermodal passenger systems, including subways, buses or commuter rail lines, exist in every major city. The Trans-Canada Highway, completed in 1962, is, at 7775 km, the longest national highway in the world.

Canadians have remained at the forefront of developments in transportation throughout the 20th century. They have developed the most automated light-rail and subway vehicles available. Canadians have designed new transportation systems accessible to seniors and travellers with disabilities, and have developed transit buses that maintain air quality by operating on natural gas and electric cells. Just as important, they are hard at work developing solutions for the transportation challenges of the 21st century.

RAIL AND URBAN TRANSIT

In 1996, the rail and urban transit sector of Canada's transportation industry shipped approximately $3 billion worth of goods, of which more than 70 percent was destined for foreign countries. The U.S. market is Canada's top customer, but countries in Asia and Latin America have shown an increasing interest in Canadian capabilities. Canadian sales to non-U.S. markets have increased significantly since 1993, particularly through the design, engineering and construction of ready-to-operate transit systems. Canadian companies have the proven technologies, expertise, new products and operational efficiencies to expand their markets.

CANADA CAN PROVIDE THE ELEMENTS THAT MAKE AN URBAN TRANSIT SYSTEM SUCCESSFUL.

Some major products offered by the Canadian industry include:

- RAIL ROLLING STOCK: PASSENGER AND FREIGHT
- TURN-KEY PASSENGER RAIL SYSTEMS
- BUSES: LARGE TRANSIT BUSES; LOW-FLOOR AND ALTERNATE-FUELLED BUSES; INTERCITY COACHES AND SCHOOL BUSES
- DIESEL LOCOMOTIVES: D-C AND A-C TRACTION
- SIGNALLING AND COMMUNICATION SYSTEMS
- ADVANCED TRAIN-CONTROL SYSTEMS
- SPECIALIZED SOFTWARE FOR TRANSIT SCHEDULING, OPERATIONS AND PUBLIC INFORMATION
- CONSULTING SERVICES SUCH AS THE DEVELOPMENT AND IMPLEMENTATION OF MANAGEMENT INFORMATION SYSTEMS

Canadian companies export far more than the vehicles on which urban transit systems are based. With showpiece urban transit systems in Canada, Turkey and the United States, and work under way in Malaysia, Canada provides the elements that make an urban transit system successful — including Canadian experience.

AUTOMOTIVE

The Canadian automotive industry is the sixth-largest in the world. It is Canada's largest manufacturing sector and most prolific exporter. The total value of shipments in 1996 was $75 billion, of which over 85 percent was exported. The sector currently employs approximately 162 000 Canadians in manufacturing and 355 000 in auto-related services. Canada produced 2.4 million vehicles in 1996.

This sector is fully integrated and rationalized on a North American basis. Many best-selling vehicle models in North America are made

in Canada. Car and truck manufacturers in the United States depend on Canadian-made parts. These are manufactured in Canada because Canadian companies deliver superior quality at competitive costs.

While the United States imports new vehicles from Canada, many overseas customers are interested in Canada as a source for replacement parts, accessories, and service and repair equipment. Canadian aftermarket sales and services were valued at $14.4 billion in 1996. Canadian firms specialize in garage, repair and diagnostic equipment. Canada also has an extensive tool-and-die sector.

Canadian manufacturers are essential to the highly successful North American automotive industry. Canada's expertise is widely understood and employed in the United States. Many other countries, including Japan, also appreciate that the Canadian automotive industry is a place to buy and a place to invest. Japanese automaker Toyota recently opened a new assembly plant in Canada, bringing its production capacity to 240 000 units/year. Honda, another Japanese automaker, is also expanding its production facilities in Canada, and will have an equivalent capacity.

AEROSPACE AND DEFENCE EQUIPMENT

Around the world, Canada has earned a reputation for high-quality, innovative products and services in selected niche markets.

Television viewers everywhere have seen astronauts doing intricate manoeuvres outside their spacecraft with the famous Canadian-built robot arm, the *Canadarm*, built by Spar Aerospace Ltd. In the next few years, Canadian robotics initiatives such as the next generation Canadarm and the Special Purpose Dextrous Manipulator (SPDM) – nicknamed the "Canada Hand" – will be used to assemble and later maintain the International Space Station.

CANADA'S AEROSPACE INDUSTRY RANKS FIFTH IN THE WORLD AMONG EXPORTERS OF AIRCRAFT AND AIRCRAFT COMPONENTS. WITH A GLOBAL REPUTATION FOR EXCELLENCE IN SERVICE, LEADING-EDGE TECHNOLOGY, AND THE HIGHEST QUALITY STANDARDS, THE AEROSPACE AND DEFENCE SECTORS HAVE GROWN TO AN ANNUAL $11.5 BILLION INDUSTRY. OVER 70 PERCENT OF CANADA'S AEROSPACE PRODUCTION IS EXPORTED.

Bombardier, the parent company of Canadair and de Havilland, is a major Canadian-controlled global aircraft manufacturer. It has the world's largest market share of deliveries and orders for 30-50 seat turboprops and jets. The company has achieved particular success with the 50-seat Canadair Regional Jet and the new, longer-range, enhanced version of the Challenger Business Jet, the Challenger 604. As well, a new high-speed 70-seat turboprop, the Dash 8 series 400 and a 70-seat version of the Canadair Regional Jet were launched in 1996 and 1997 respectively. The Global Express, a new long-range executive jet, is undergoing certification testing and will be available in 1997.

Bell Helicopter Textron, a Division of Textron Canada Ltd., is the first totally integrated helicopter manufacturing company in Canada and currently manufactures the 206B-III Jet Ranger, 206L-IV Long Ranger, 206L-IV(T) Twin Ranger and 407 light helicopters. Additional products are the 430 intermediate, and 212, 412EP, 412CF medium helicopters. In active development is the 427 twin-engine four-blade light helicopter. Situated in Mirabel, Quebec, this facility began operations in 1986, producing all Bell Helicopter Textron's commercial products for worldwide delivery. It enjoys and supplies a 60-percent market of world consumption of civil turbine-powered light to medium helicopters.

CAE Electronics Ltd. is the world leader in the design and production of commercial full flight simulators, and is a designer and manufacturer of military full flight simulators, power plant simulators, electronic control systems, and other computer-based systems for air-traffic management, space exploration, marine applications, and electric power generation and transmission.

Three Canadian firms build world-class commercial aircraft landing gear systems. They are Messier-Dowty Inc. (Ajax, Ontario and Mirabel, Quebec), Menasco Aerospace, Division of Coltec Aerospace Canada, Ltd. (Oakville, Ontario) and Héroux Inc. (Longueuil, Quebec). These three firms have captured over 50 percent of the world market for commercial sized landing gear (estimated at $1.4 billion in 1996).

Transportation

Canada is recognized internationally for its excellent training capacity. Canadian companies specialize in fields such as flight simulation and air-traffic control, diagnostics and pilot training. Canada provides other training and consulting services in air navigation, aviation meteorology, aerial firefighting, airport planning, design, operations, maintenance and management. Canada is also a world leader in airport security products.

Canadian defence firms have developed subsystems and components for specialized markets in which they are world leaders. Canada is particularly competitive in light armoured vehicles, marine systems and platforms, informatics, aircraft upgrade programs, precision optics, robotic systems, explosive and narcotics detectors, shipboard systems acoustics, communications systems, helicopter haul-down systems and avionics.

Many Canadian defence firms have diversified their production so that they have commercial as well as military applications, increasing their export potential and their ability to survive declining global defence budgets.

SERVICES

Canadian-manufactured and Canadian-designed transit and aeronautics systems are highly regarded by transportation experts around the world. So are Canadian transportation consultants. These consultants — who have developed superior skills in overcoming transportation problems in Canada's vast and difficult terrain — provide insight and assistance to clients around the globe.

CANADIANS HAVE REMAINED AT THE FOREFRONT OF DEVELOPMENTS IN TRANSPORTATION THROUGHOUT THE 20TH CENTURY.

Areas of Canadian consulting expertise include:

- AERONAUTICAL ENGINEERING AND SPACE TECHNOLOGY
- SEA PORT AND AIRPORT DEVELOPMENT, MAINTENANCE AND MANAGEMENT
- TRANSPORTATION SYSTEMS AND ELECTRICAL ENGINEERING
- TRANSPORTATION PLANNING
- TRANSIT MANAGEMENT
- POLICY DEVELOPMENT
- FISCAL PLANNING
- RAPID TRANSIT DESIGN
- COMMUTER RAIL SYSTEMS
- URBAN BUS SYSTEMS
- SYSTEMS FOR THE ELDERLY AND DISABLED
- DESIGN AND OPERATION OF MULTI-MODAL TERMINALS
- PRICING AND INFORMATION SYSTEMS
- OPERATING AND MAINTENANCE STRATEGIES
- DESIGN AND CONSTRUCTION OF RAIL PLANTS
- ENVIRONMENTAL ASSESSMENT STUDIES
- COMMUNICATIONS AND DATA COLLECTION
- HEATING AND AIR CONDITIONING
- INTERMODAL SYSTEMS
- LOGISTICS

Canadian consultants are at the forefront of the international market for services such as the development and application of management information systems, intermodal operations, supervision of rail construction and locomotive rehabilitation programs.

Canadian-made equipment is installed at airports around the world. Canadian firms have proven expertise in air-traffic control, airport management systems, meteorology, and in the architecture, engineering and construction of airports in many countries. Canada's capabilities for marine-port development range from sophisticated modern container terminals for general cargo to specialized single-purpose installations for the handling of bulk commodities and vessel-traffic management systems.

Energy and Natural Resources

Canada is a land of vast energy reserves, from hydroelectric power to tar sands, from huge natural gas deposits to a unique nuclear capacity. Canada has become a leader in the multifaceted field of energy development. Canadians have designed, built and now operate a huge network of pipelines — including the world's longest petroleum pipeline and a natural gas pipeline system that supplies 22 percent of North American natural gas requirements. Canada's private-sector and public utilities are working with partners around the world to develop and upgrade power systems.

OIL AND GAS

The world's first oil well was drilled in the Canadian community of Oil Springs, Ontario, in 1857. Before long, Canadians who had helped develop Canadian petroleum resources were exporting their expertise to other countries. For more than a century, Canada has been working with other countries to develop oil and gas reserves. Now Canadians are also applying their technological, financial and managerial expertise in the production and distribution of oil and gas in countries as diverse as Argentina, Malaysia and Australia.

Efficient exploitation of oil and gas reserves depends upon keeping up with the rapid pace of technological change in the industry. Canada is at the forefront of the latest developments in enhanced recovery techniques and oil sands extraction.

Canada offers a variety of equipment and services used in exploration, drilling, servicing, producing and processing. Canadian exports include geophysical prospecting equipment; drilling rigs and ancillary tools; pumping machinery; cementing and well-fracturing units; field processing components such as dehydrators, separators and treaters; and drill and processing equipment for offshore drilling platforms.

Canadian firms also have first-rate service capabilities, particularly in pre-drilling exploration and preparation, drilling services (mud, cement, logging, testing, coring and fishing), and well-completion services (perforating and stimulating).

A HIGHLY TRAINED CONTINGENT OF CANADIANS IS ACTIVE IN EVERY AREA OF OIL AND GAS EXPLORATION AND PRODUCTION.

More than 1500 Canadian firms operate internationally, offering other countries the opportunity to increase efficiency and develop new capabilities. A highly trained contingent of Canadians, from top-level managers and professionals to skilled workers, is active in every area of oil and gas exploitation. Engineers and consultants can assess the commercial viability of oil and gas reserves and the means to improve the production of existing projects. Canadian companies can help build and operate sophisticated pipelines over long distances, and can also help gather, process and market natural gas and petrochemicals.

In 1994, international customers bought Canadian equipment and services worth approximately $1.5 billion — 10 times the level of exports recorded only eight years earlier. These sales have been supported by the willingness of Canadian firms to transfer technology, provide training and offer reliable after-sales services.

Joint ventures are a Canadian specialty, and allow companies to tackle large projects and draw on many factors of production. Canadian companies have established foreign subsidiaries and joint ventures in diverse markets such as the United States, Europe, India, Southeast Asia and Latin America .

Canadian companies will manufacture equipment such as drilling rigs and field processing units at home or abroad to suit local requirements. They also have a worldwide network of agents, distributors and service companies to ensure that parts and services will be readily available to overseas customers.

Canadian companies are world leaders at developing specialized equipment related to the extraction of sour gas, heavy oil and oil sands deposits, three key resources that are abundant in Canada. Specialized equipment for extracting oil from tar sands and gathering and treating sour gas is currently being exported to India, the People's Republic of China, Russia, Kazakhstan and Azerbaijan.

Canadian expertise also extends into the areas of primary and secondary recovery of conventional oil. Canada has a well-earned reputation in the field of advanced fracturing technology, as well as directional and horizontal drilling for the recovery of oil and gas from difficult formations and depleted wells. Top motor drives, software products, computer-controlled automatic coring devices and automated pipe-handling systems are all areas in which Canadian firms have made significant advances. Much of this technology and many new techniques have been developed in co-operation with overseas customers.

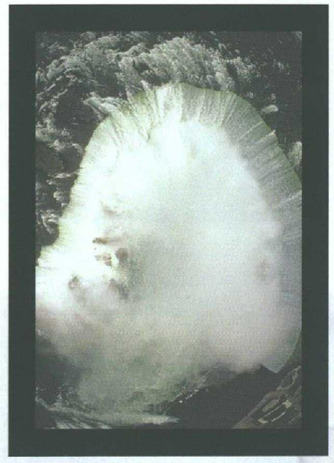
ELECTRICAL POWER

Canadians have developed a wealth of knowledge and experience in building systems that generate, transmit and distribute power. They have designed, built and operated some of the world's largest and most complex electrical projects, such as the Churchill Falls, the James Bay and Niagara Falls projects in Canada. Canadian consulting engineers, government utilities, private manufacturers and construction firms are working in more than 70 countries around the world. Canadians are sought-after partners because they not only are experienced and have the latest equipment and technology, but also are willing to transfer that technology.

Canadian utilities specialize in generation technologies for hydro, nuclear and conventional thermal power and are regarded as international leaders in AC and DC transmission lines and long-distance and high-voltage transmission. Canada is a vast country, and its utilities have had to develop innovative transmission systems that operate efficiently and reliably in extreme heat, cold and high humidity. Canadian firms are innovators in the development of technology and systems that save energy, improve efficiency and control emissions.

CANADA, THE WORLD'S LARGEST PRODUCER OF HYDROELECTRIC POWER, IS ALSO THE FIFTH-LARGEST PRODUCER OF ELECTRICITY FROM ALL SOURCES.

Canadian power companies are competitive in all areas related to generation, transmission and distribution equipment, and professional services. Canada specializes in the design and construction of highly engineered, high-technology specialty equipment, including custom-designed hydro turbine generators, power boilers, gas generators and nuclear reactors.



Atomic Energy of Canada Limited (AECL) offers a unique technology in the CANDU nuclear power system. The major features that distinguish CANDU from its international competitors include:

- USE OF NATURAL URANIUM FUEL AS OPPOSED TO ENRICHED URANIUM;
- USE OF PRESSURE TUBES RATHER THAN A LARGE PRESSURE VESSEL TO HOLD THE FUEL;
- USE OF HEAVY WATER RATHER THAN ORDINARY WATER AS A COOLANT AND MODERATOR; AND
- ON-LINE REFUELLING AS OPPOSED TO SHUTTING DOWN THE UNIT.

The Canadian power industry exports about $1 billion in energy exports to the United States and $2 billion in goods and services annually to customers in countries such as South Korea, China, Indonesia, Israel, Egypt and Venezuela. Canada's leading exports include:

- EQUIPMENT FOR HYDRO, THERMAL AND NUCLEAR GENERATING STATIONS
- POWER TRANSMISSION AND DISTRIBUTION EQUIPMENT
- ELECTRICAL WIRE AND CABLE PRODUCTS
- POWER AND DISTRIBUTION TRANSFORMERS
- CONTROL AND PROTECTION EQUIPMENT
- POWER-CONVERSION EQUIPMENT
- CO-GENERATION, MINI HYDRO STATIONS AND REMOTE LOCATION POWER GENERATION
- CONVENTIONAL AND ADVANCED TECHNOLOGY BATTERIES
- FUEL CELLS

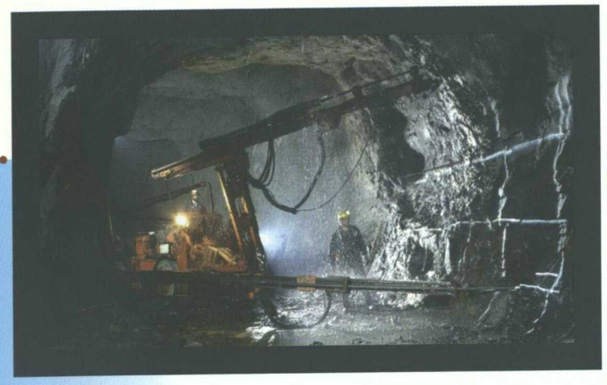


Photo courtesy of Graeme Oxby

MINING

Canada is one of the world's largest mineral producers and exporters of minerals, metals and related products. From 1993 to 1996, the value of Canada's total mineral exports (excluding oil and gas) increased from $29 billion to just under $42 billion.

Canadian mining companies hold interests in more than 2700 properties, spanning 99 countries around the globe. There are currently 130 Canadian companies in Mexico, and 36 in Chile, all in various stages of exploration and development. Canadian mining companies have invested $6 billion in the Chilean mining sector.

With access to abundant, high-quality reserves, Canada's minerals and metals industry produces some 60 non-fuel mineral commodities. These resources, combined with a well-established mining infrastructure, an efficient transportation system and a highly skilled and productive work force, have earned Canada an international reputation for excellence in mining. In 14 of the last 27 years, Canada has ranked first in the world as a destination for international mineral exploration capital.

Canada is committed to the sustainable development of minerals and metals and is playing a lead role internationally in the development of approaches aimed at the sound management of these resources.

MINING TECHNOLOGIES

To achieve and maintain Canada's impressive level of mineral production, Canadian companies have developed unique mining and exploration expertise in all aspects of underground and open-pit mining. In addition, more than 85 percent of Canada's mining work force uses electronics, robotics and advanced telecommunication technologies.

Canada leads the world in the production of potash, zinc and uranium and ranks among the top five international producers of nickel, cadmium, asbestos, aluminum, copper, gypsum, cobalt, molybdenum, lead and gold.

Canadians have pioneered the development of exploration techniques in the areas of ground and airborne geophysics. Canadian companies have captured 70 percent of the world market for airborne geophysical surveying, while Canadian geophysical equipment manufacturers, related software developers and data interpretation companies hold about 60 percent of these world markets.

Canadian technologies improve mine safety, enhance environmental systems and increase productivity, allowing mining companies to be at their competitive best. Canadian mining companies are developing the "intelligent mine" — one that can automatically detect changing mine conditions and respond appropriately. Canada has developed complete automated systems for mineral processing. It is the world leader in microwave applications to refractory and carbonaceous ores. Other technologies developed by Canadian companies, such as three-dimensional geological computer modelling and mine planning systems, maximize the value that can be extracted from an ore body.

Canada's expertise in mining equipment ranges from small diameter borehole survey instruments to tunnelling machines. Canadians are innovative designers and manufacturers of custom and utility vehicles, trucks, and load-haul-dump equipment of all sizes, as well as computerized maintenance and dispatch systems for underground mining. Canada's innovative mining equipment also includes dual rotary drills that penetrate and case at the same time, reverse circulation drilling machines, and high-technology equipment for bulk handling of materials. Canadians are at the forefront in the use of global positioning systems in open-pit mines. Other key technologies developed in Canada include three-dimensional drill hole technology that simplifies the process of delineating a mineral deposit; flash smelting, and continuous smelting, as well as world-leading assaying techniques.

Canadian mining companies have been innovators in developing leading-edge technologies to improve environmental quality. Canadian environmental service companies are enjoying rapid international growth. Among the environmental technologies in which Canada excels are exhaust purification, which ensures a clean underground environment; dewatering and fluidizing methods for the treatment of tailings; and a full range of groundwater monitoring instrumentation. Canada's mining industry was the first in the world to develop and adopt a national environmental policy.

Canada has a well-established and effective scrap metals recycling industry, which includes many companies that have expertise in recycling electronic scrap.

INVESTMENT OPPORTUNITIES

The Canadian government is committed to a favourable mining investment climate. Canada offers foreign investors many opportunities to participate in hundreds of projects at all stages of development, from early exploration to production. At the beginning of 1997, Canadian companies held a portfolio of some 3400 foreign mineral projects in more than 100 countries around the world. Canada annually holds one of the world's largest mining trade shows, which provides a unique window on Canadian mineral-investment opportunities worldwide.

Canada has provided a positive climate for junior mining companies. Young international mining companies listed on Canada's stock exchanges provide further opportunities for investors to participate in mineral development the world over. Many major initial public offerings and secondary financings for mining take place on the Vancouver and Toronto stock exchanges, making Canada the world's pre-eminent centre for mine financing.

FOREST INDUSTRIES

With some 240 million hectares of commercial forest land found within its borders, Canada is home to diverse species of some of the world's finest softwoods and hardwoods. The second-largest commercial softwood forest in the world is found in Canada. This fine resource base, combined with a highly skilled work force, advanced technology and proximity to international markets, gives Canada's forest products a leading competitive advantage in the world marketplace.

Canada is the world's largest exporter of forest products. In 1995, Canadian forest industry shipments totalled $71 billion, three fifths of which were exported to markets around the world. Principal exports include high-quality primary products such as market pulp, newsprint, softwood lumber and wood-based panel products. The production and

export of higher value-added products such as paper packaging, stationery and business papers, wood windows, doors, mouldings and furniture, as well as wood building products, are all areas of high growth potential. In 1995, Canada became the largest exporter of manufactured housing to Japan, with export growth of over 1000 percent since 1992. The industry is consistently the largest contributor to Canada's positive trade balance.

WITH SOME 240 MILLION HECTARES OF COMMERCIAL FOREST LAND FOUND WITHIN ITS BORDERS, CANADA IS HOME TO DIVERSE SPECIES OF SOME OF THE WORLD'S FINEST SOFTWOODS, MIXED WOODS AND HARDWOODS.

Two major groups comprise the forest industries sector: paper and allied industries and wood industries. Most of the country's major forest-sector firms produce both wood and paper products. Mills producing commodity pulp and paper and wood products tend to be world-scale operations, with integrated activities ranging from silviculture and harvesting to manufacturing. Producers of higher value-added products tend to be smaller operations.

Over its 200-year history, the Canadian forest industry has evolved as a world-class, technologically advanced industrial sector. It is a leader in sustainable forestation techniques, and a new Canadian standard has been developed for the certification of sustainably managed forests. Three internationally competitive forest products research institutes have been established in Canada: the Pulp and Paper Research Institute of Canada, the Forest Engineering and Research Institute of Canada, and Forintek Canada Corporation. These institutes work collaboratively with industry and government to address technology, product-innovation and environmental issues. A strong co-operation between industry and government over the last decade has resulted in the development of world-class technologies, especially in paper recycling. For example, the closed loop technology is one technology that has revolutionized the paper industry around the globe.

The forest products industry is continually adapting to changes in the global business environment to maintain its pre-eminence. Canadian forestry is moving towards sustainable management. Forest-product companies have made significant investments in capacity-increasing advanced manufacturing and environmental technologies, resulting in products of a high quality that are cost competitive yet respect the sensitive ecological balance of the forest resource.

Construction and Building Products

Photo courtesy of the Canada Export Award Program

The construction and building products industry is one of Canada's largest and strongest industries, with an annual output of $90 billion. Access to a rich and abundant supply of indigenous materials, combined with a highly skilled, efficient labour force and an ample manufacturing capacity, have fuelled an increase in exports by Canadian-based construction companies of 300 percent in the last three years.

The competitiveness of Canada's construction and building products in the international marketplace is further enhanced by the willingness of Canadian companies to work with international partners to establish mutually accepted standards and building practices. Canada's building codes are constantly upgraded, and construction and building products must meet the exacting standards of the Canadian Standards Association. Canada's construction and building technologies also reflect the high priority placed on quality and energy conservation, while making efficient use of sustainable resources.

Since export growth is anticipated to continue, these conditions offer outstanding investment opportunities. Furthermore, the North American Free Trade Agreement provides investors with tariff-free access to a construction and building products market of more than US$600 billion.

HOUSING

According to the Organization for Economic Co-operation and Development (OECD), Canadians are among the best housed people in the world. Weather conditions varying from harsh dry winters to hot humid summers have forced Canadian scientists to take the lead in developing technologies in air control, heat and moisture flow, durability, and fire safety.

CANADA'S CONSTRUCTION AND BUILDING TECHNOLOGIES ALSO REFLECT THE HIGH PRIORITY PLACED ON QUALITY AND ENERGY CONSERVATION, WHILE MAKING EFFICIENT USE OF SUSTAINABLE RESOURCES.

Canadian housing products incorporate world-class building technology, exemplified by the Canadian-developed R 2000 standard, which ensures that products provide maximal energy conservation and optimal internal air quality and comfort.

Canadian expertise ranges from complete turnkey projects, for which Canada is renowned in places such as Germany and China, to manufactured components. Canada has become a recognized world leader in manufactured or pre-fabricated housing, with exports in this area more than tripling in the last three years.

Canada's pre-fabricated wood-frame housing system is world renowned for its high quality and price competitiveness. Available as a complete system, it is easily transportable and can be constructed in a very short time. Similar building systems in light steel are very successful internationally. Both systems are highly earthquake resistant. Panelized housing is equally suitable for export markets because it is transportable and can be constructed quickly.

Canadians have been equally at the forefront of developing world-class high-rise construction technologies such as concrete composite systems. The leading flying form techniques for effective construction of medium- and high-rise apartment blocks have been pioneered by Canada.

BUILDING PRODUCTS

Canada's building products industry encompasses more than 400 different manufactured products, worth $25.8 billion in output per annum.

Among the manufactured products in which Canadians excel in workmanship and price competitiveness are windows and doors. Canada produces metal, wood and plastic windows and doors that are highly competitive in international markets. Exports of plastic and wooden doors and windows have increased more than 500 percent over the last five years. Canadian-manufactured kitchen cabinets also enjoy a global reputation for leading quality, design and finish, as well as excellent growth and export capabilities.

Canada is a recognized leader in the development of heating system technologies and in applying thermal energy conservation techniques in housing. Canada's leading-edge heat recovery ventilators and air-exchange technology reflect the high priority the Canadian industry places on air quality. A proven breakthrough technology in air flow, temperature and moisture control is the seamless housewrap sheathing membrane, developed in Canada.

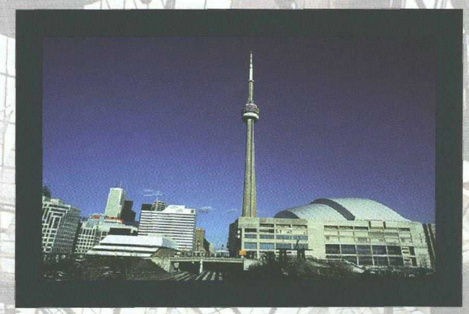
MATERIALS

Canada excels in the manufacture of construction and building materials ranging from trusses and insulated thin-brick panel cladding materials to aluminum and vinyl exterior cladding. Canadian scientists have successfully developed innovative technologies in masonry veneer and asphalt roof shingling, as well as high-density calcium silicate bricks.

Canadian companies have also developed outstanding production systems for fast-formed concrete foundations. Shotcrete and other construction and restoration techniques such as dry-stacked concrete block wall systems exemplify leading developments in the use of concrete. Canada leads in tilt-up concrete construction and curtain wall construction technologies. Canada is a world leader in colour-coated steel production, as well as in the reconstitution of structural wood to form composite products of the highest strength and quality.

CONSTRUCTION, ARCHITECTURAL AND ENGINEERING SERVICES

Canada has world-class engineering, architectural and construction contracting capabilities. Services in which Canadians excel include infrastructure project design and construction (highways, airports, power facilities, pipelines, water and sewer works etc.), urban planning and design, ranging from remote arctic settlements in Siberia to large Asian cities; land assembly; site design and servicing; and environmental analysis. From the design of cultural buildings, retail and office complexes to pulp and paper mills. Canada has also established itself as a world class designer and builder of stadiums and bridges. Examples include Toronto`s SkyDome stadium that boasts the world`s first fully retractable roof, and the Confederation Bridge, which connects Prince Edward Island to mainland Canada. Officially opened in June of 1997, it is 12.9 kilometres long and was the largest public-private mega project in Canada`s recent history. These are only a few examples of world-class expertise offered by Canadian architects and engineers.



Telecommunications and Information Technologies

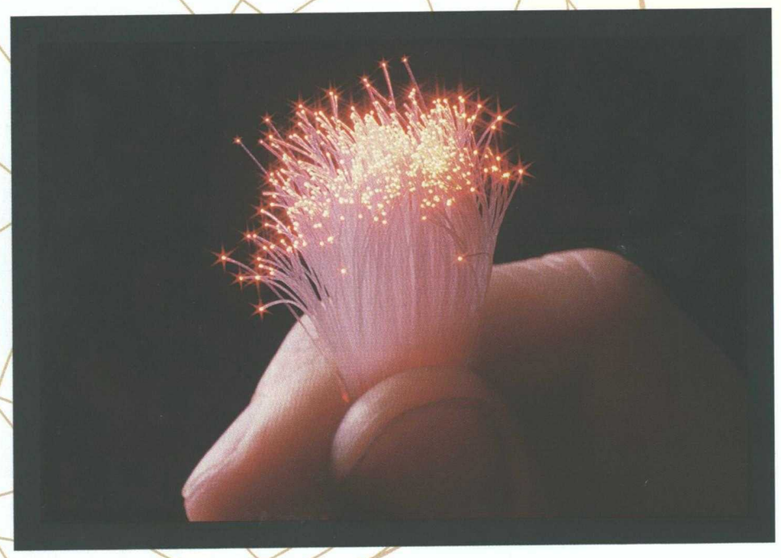


Photo courtesy of Cover to Cover Design Corporation

Staying on the leading edge of information and telecommunications technologies is essential to building an infrastructure that makes countries competitive in international markets. Working from a sophisticated base in Canada, Canadian companies have helped upgrade information and telecommunications systems around the world.

Canadians have been setting the pace in some of these industries for more than a century. The very first telephone call was placed in Canada by Alexander Graham Bell, the Canadian inventor of the telephone. Canadian information and telecommunications companies have built on these kinds of historical achievements. They have remained innovative and cost-efficient and continue to win large numbers of foreign contracts, many of them in the highly competitive U.S. market.

One need only look at a map to see that Canada's communications systems have had to overcome challenging geography and climatic extremes. They have done that successfully. Canada's recent telecommunications breakthroughs have coincided with advances in information technologies that include software products, computer services and new media, geomatics products, computers, peripherals and instrumentation, and electronic components.

CANADA'S TELECOMMUNICATIONS SYSTEMS PROVIDE A WIDER ARRAY OF SERVICES TO A BROADER BAND OF CUSTOMERS THAN IS AVAILABLE IN ANY OTHER COUNTRY IN THE WORLD. VIRTUALLY EVERY HOUSEHOLD IN CANADA IS CONNECTED THROUGH TELECOMMUNICATIONS.

TELECOMMUNICATIONS

In 1994, the U.S. Mesa Research Group ranked Canada first in both the comprehensiveness and the quality of its telecommunications systems when compared with the United States, Japan, the United Kingdom, Germany and Singapore.

Canadians are the heaviest users of telephones in the world; 99 percent of households have telephones, and 92 percent have access to multiple television channels through cable networks. As well, more than 90 percent of Canadian telephones have been digitized.

Coast-to-coast fibre-optic networks provide a full range of commercial services, as well as the necessary bandwidth required to develop and test tomorrow's high-speed multimedia services. The National Test Network (NTN), the world's longest asynchronous transfer mode (ATM) testbed, spans 6000 km and includes international connections to U.S. and European research networks.

Companies in Canada are active around the world in countries such as the United States, the United Kingdom, Brazil, China, Thailand and the Philippines, installing the same kinds of efficient communications networks that Canadians have come to depend upon.

Canadian telecommunications "firsts" have included:

- THE WORLD'S MOST POWERFUL GEOSTATIONARY MOBILE COMMUNICATIONS SATELLITE (1996)
- THE WORLD'S MOST COMPREHENSIVE FIBRE-OPTIC NETWORK (1994)
- THE WORLD'S LARGEST POINT-TO-POINT ATM NETWORK (1993)
- THE WORLD'S LARGEST CONTIGUOUS CELLULAR NETWORK (1990)
- THE WORLD'S FIRST NATIONAL GEOSTATIONARY SATELLITE (1972)
- THE WORLD'S FIRST PACKET-SWITCHED NETWORK (1972)
- THE WORLD'S FIRST DOMESTIC DIGITAL MICROWAVE NETWORK (1971)

More than 90 percent of Canada's telephone network has already been digitized.

Over the next 10 years, Canada's local and long-distance networks will be upgraded in interactive, two-way broadband capacity. When the upgrading is complete, 80 to 90 percent of all businesses and homes in Canada will have access to the multimedia traffic lanes and technologies of the information highway. Canada's goal

is to build the highest-quality, lowest-cost information network in the world. Immense potential exists in all information and telecommunications subsectors for collaborative research and development and for joint ventures and international alliances between Canadian and foreign companies.

In 1995, Canada sold over $6 billion in telecommunications equipment, mostly to customers in the United States, China and the United Kingdom. Canadian companies specialize in several areas of telecommunications, including switching systems, broadband and multimedia products and services, fibre-optic cabling, rural communications, design and application of submarine cable systems, satellite networking, computer telephony integration and mobile and cellular phones. There are very few areas of telecommunications and information technology in which Canadian companies are not at the forefront of development.

The willingness to form strategic alliances and transfer technology is an essential feature of a good partner. Many joint trade and investment opportunities have been realized after representatives of other countries visited Canada through the Telecommunications Executive Management Institute of Canada education program. Countries are moving toward the creation of more open economic systems that welcome healthy competition from abroad and joint enterprise within their own borders. Canada itself welcomes both competition and outside investment.

Canada's regulatory agency, the Canadian Radio-television and Telecommunications Commission (CRTC), has effectively opened local telephone service to competition from all suppliers, including cable companies, resellers and wireless providers. Telecommunications companies can now provide new information and multimedia services, such as home banking and shopping, distance education and telemedicine.

Canadian companies have worked with state enterprises in countries such as Malaysia to find the best way to open their own systems to lower costs and to increase efficiency. They have provided the feasibility and viability studies and assisted in the development of working systems.

INFORMATION TECHNOLOGIES

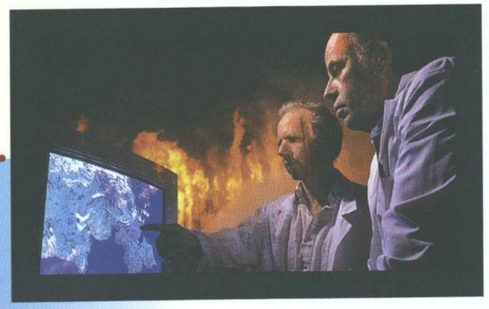
Canada's exports of information technology products (including computers, consumer electronics, peripherals and software products) are growing, with Canadian firms recording strong performances in this industry. With growing Canadian capacity, offshore investors and companies are approaching Canada in search of North American alliances.

THERE ARE VERY FEW AREAS OF TELECOMMUNICATIONS AND INFORMATION TECHNOLOGY IN WHICH CANADIAN COMPANIES ARE NOT AT THE FOREFRONT OF DEVELOPMENT.

Software products, multimedia products and geomatic solutions are three areas in which Canada continues to have considerable success.

The software products and computer services industry has grown rapidly in Canada. Revenues of the top 100 software products companies totalled more than $2 billion in 1996 (up 4.7 percent from 1995), of which 83 percent was derived from exports. Revenues of the top 50 service firms grew by 40 percent, reaching $1.4 billion in 1996. Many of these companies have formed strategic alliances with foreign partners to enhance distribution and foster product development.

Canada has established leading positions in specialized markets such as graphics, Internet tools, document management, geographic information systems (GIS), systems development, and information-technology management. In Canada the SchoolNet family of programs is integrating the Internet into virtually every classroom, library and community across the country to help its citizens build the skills they require for the information-based economy and society of the 21st century. As a co-operative venture among federal, provincial and territorial governments, SchoolNet facilitates excellence in learning through electronic networking across Canada.



In the field of multimedia, Canadian firms are developing high-quality training and educational products, as well as entertainment products such as CD-ROM games. Canadian firms also excel in specialized markets such as animation, three-dimensional simulation and photo applications. Although the United States is the largest foreign market for Canada's software and new media industries, Canadian companies are quickly building international alliances in countries such as the United Kingdom, Brazil, Peru, Norway and Singapore.

The field of geomatics is an area in which Canada has become a strong international leader. Geomatics involves the acquisition, storage, analysis, distribution and management of geographically referenced information. This technology can be applied by both private-sector and government users to manage information on such diverse areas as natural resources (such as forestry), the weather and tax collection. The Canadian government has encouraged co-ordinated partnerships between the private and public sectors in this field. Canadian industry-government consortia have recorded several successes in winning projects internationally.

THE SPACE INDUSTRY

More than 150 Canadian firms are now involved in the space industry. In 1994, they sold over $700 million in goods and services, of which nearly half was exported. The Canadian space industry exports a larger proportion of its total production than do any of its competitors.

Canadian companies have registered many successes around the world, most notably in mobile personal satellite communications, remote-sensing hardware and data acquisition. They are responding to growing demand for space equipment and services related to Earth observation facilities and telecommunications equipment. The industry has also developed an advanced capacity in robotics and space infrastructure and has been a major contributor to the International Space Station Program.

The 1995 launch of the Canadian RADARSAT satellite ushered in a new age in remote sensing, and firmly positions Canada as a leader in Earth observation. Unlike most remote-sensing satellites, which use optical sensors to capture sunlight reflected from the Earth, RADARSAT can collect images of the Earth day or night and through clouds using a powerful microwave Synthetic Aperture Radar system. Travelling approximately 800 km above the Earth, RADARSAT produces images of the surface that can be used in monitoring the environment and managing the Earth's natural resources.

Television viewers around the world observed the mission of the U.S. space shuttle Atlantis in the fall of 1995. This mission used Canada's newly developed Space Vision System, which made possible the installation of a connecting bridge between the shuttle and the Russian space station MIR.

Photo courtesy of Radarsat International Inc.

The Canadian-made MSAT, launched in early 1996, is one of the world's most powerful commercial satellites for mobile and fixed applications. The MSAT Network has brought advanced mobile and stationary wireless telecommunications to almost every square kilometre of Canada, picking up where cellular networks leave off. It covers all of Canada, the United States and Mexico, most of the Caribbean and Central America, and 400 kilometres out to sea, helping individuals, businesses and search-and-rescue teams, in coastal and remote areas.

Financial Institutions

Canadian financial institutions offer a variety of products and services that have made them attractive to customers and investors around the world. They offer investments that are not only lucrative, but low in risk.

From banks, trust companies and co-operatives to insurance companies and stock exchanges, Canada's well regulated financial institutions are among the safest in the world. Canadian legislators are very attentive to the rules and regulations that govern Canada's financial sector. They are determined to maintain a system that is stable and encourages competition.

Canadian financial institutions are also among Canada's leading export earners. Liberalization of financial regulations in North America, South America and the Caribbean, Europe, Asia and the Caribbean is providing foreign clients with greater opportunities to take advantage of Canadian financial services.

Canada's six major banks have all established foreign commercial operations, most of them in a number of countries on several continents. Canadian life insurance companies, major investment brokers and trust companies operate virtually everywhere in the world.

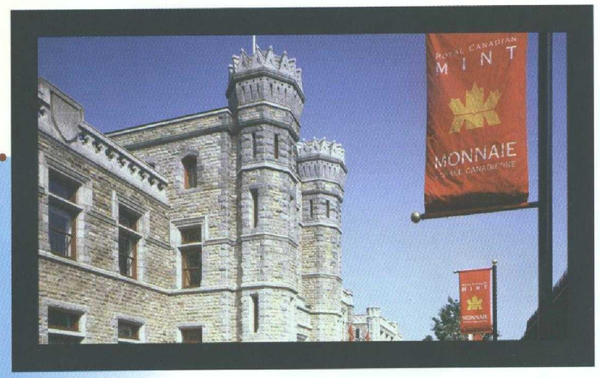
These institutions have responded to the growing interest of foreign investors in Canada as a secure, low-restriction market offering attractive returns and an opportunity for risk diversification. They have also responded to the growing demand for competitive, reliable financial services in other countries.

CANADIAN FINANCIAL INSTITUTIONS HAVE DEVELOPED A SOPHISTICATED CAPACITY TO MANAGE EFFICIENT AUTOMATED SYSTEMS SPANNING LARGE NETWORKS OF BRANCHES ACROSS CANADA.

While there are differences among the services offered by Canadian institutions, there are also some basic similarities:

- *Banks focus on private and investment banking services for both Canadian and international customers. They also offer foreign exchange and treasury services, trade credit, guarantees and acceptances.*
- *Trust companies offer private and merchant banking, investment services and a range of advisory services to both international and Canadian clients.*
- *Life insurance companies sell individual policies and annuities to local customers, either directly, through brokers, or through corporate employee benefit plans.*
- *Brokerage houses offer Canadian securities — as well as securities from other countries — to international and Canadian customers.*

Technological change is making modern financial institutions more efficient and user-friendly. Canadian financial institutions have developed a sophisticated capacity to manage efficient automated systems spanning large networks of branches across Canada. They possess a wealth of expertise in operating and co-ordinating branches, in the design of payments systems, and in many other areas. Some foreign financial institutions have already learned that they can speed the modernization of their systems by taking advantage of these advisory resources.



The Canadian Depository for Securities has developed an automated facility for the electronic clearing of security transactions and the custody of securities. This facility helps reduce clearing costs through both its efficiency and its protection against fraud and corruption.

Canadian institutions are always looking for ways to offer healthy returns on equity to international customers seeking opportunities that are diversified, potentially lucrative and safe. In recent years they have upgraded their capacity to offer assistance with investment banking, treasury and foreign exchange operations, and various private banking services. They are also experienced in the realm of venture capital through sponsorships and investments in venture funds that finance high-technology companies.

Canadian insurance companies have been successful at selling life and health insurance policies as well as pension plans and annuities to foreign companies. The Canadian advantage can be stated in one word: security. In Canada, life and health insurers must satisfy regulatory authorities that policy reserves are sufficient to meet the anticipated requirements of policyholders.

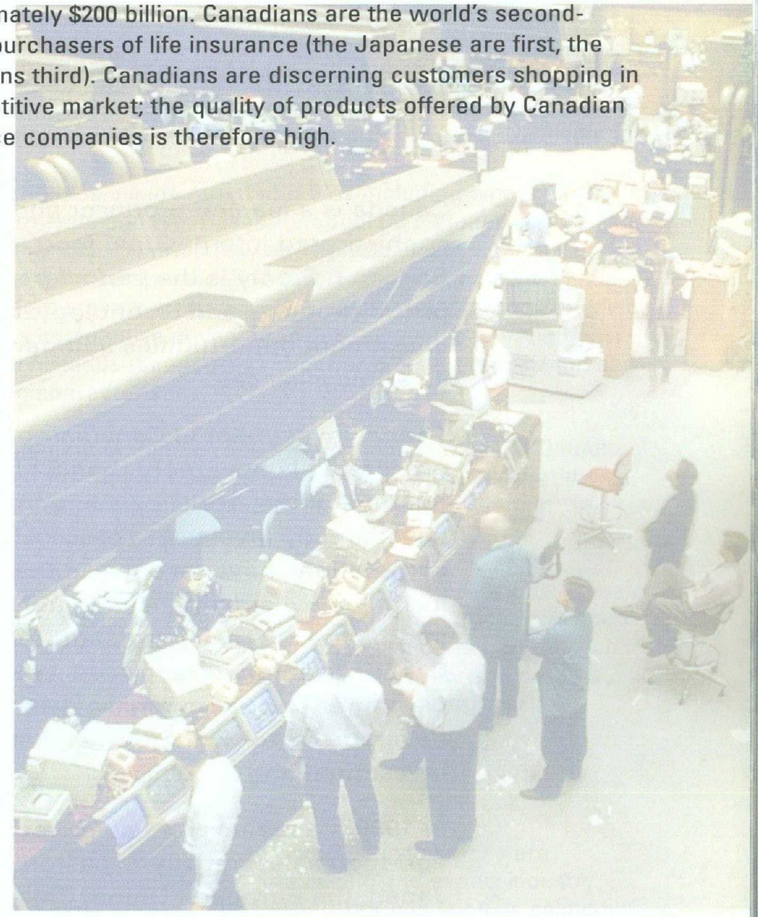
There are 160 insurance companies in Canada. Since there are also no significant barriers to entry for foreign or domestic players (other than clear regulations that guarantee the safety of a client's money), the Canadian insurance industry is extremely competitive.

The system offers a variety of traditional life insurance products in health, accident and sickness, and annuities and other pension services. This Canadian system is appreciated in the United States and other foreign countries; more than 40 percent of the industry's revenues come from abroad. More than five million non-Canadians own more than $600 billion in life insurance policies underwritten by Canadian companies.

Although there has always been a strong regulatory framework for insurance companies in Canada, several steps were taken by the federal government in 1992 to enhance consumer protection. The Canadian industry itself provides a protection fund for policy holders with Canadian institutions. The government further enhanced the system's international reputation by bringing in a regime of Minimum Continued Capital and Surplus Requirements. This is similar to the Bank for International Settlements, which ensures that banks have adequate capital available to settle all claims in even the most difficult circumstances.

Canadian life and health insurers possess worldwide assets of approximately $200 billion. Canadians are the world's second-largest purchasers of life insurance (the Japanese are first, the Americans third). Canadians are discerning customers shopping in a competitive market; the quality of products offered by Canadian insurance companies is therefore high.

THE CANADIAN ADVANTAGE CAN BE STATED IN ONE WORD: SECURITY.



Agri-food

Canada is a leading producer and exporter in the increasingly sophisticated international food and beverage marketplace. Canada not only is the perfect place to shop for competitively priced products and technology, but also presents enticing investment opportunities and partners willing to form strategic alliances.

Capital investment in Canadian-based food and beverage processing is now more than $2 billion a year. Over three quarters of the world's leading food and beverage companies have already invested in processing facilities in Canada. These corporations have recognized that Canada is the most lucrative investment location in North America. Offering an internationally recognized agri-food inspection system, Canada is committed to food safety and quality. Canada welcomes and encourages investment in its food and beverage sector with policies that promote business investment and growth.

In 1996, Canadian companies recorded $19.95 billion in agri-food sales, mostly to customers in the United States, Japan, the European Union, China and Mexico. The industry set an export target of $20 billion, which it expects to meet and exceed by the end of the decade. The secret to Canada's success has been a combination of high-quality foodstuffs and dramatically increased efficiency.

Under the North American Free Trade Agreement, Canadian-based agri-food companies have gained preferential access to the entire North American market of 386 million consumers. To serve this rich and demanding market, Canadian businesses offer first-rate, innovative products at competitive prices.

Canadian companies are committed to working in the international marketplace where the demand for value-added foods and beverages is booming, especially in emerging economies. Some sectors in which Canadian agri-food interests are internationally competitive are cereal grains, seafood and aquaculture, vegetable oils, meat and animal genetics, and processed food and beverages.

GRAINS AND OILSEEDS

With international sales of $9.1 billion in 1996, Canada's reputation as a reliable supplier of high-quality grains and oilseeds is undisputed.

Canada produces a wide range of grains including wheat, durum, barley, corn, oats and rye. Oilseed production includes canola, flax and soybean. Many nutritionally and agronomically superior grain and oilseed varieties are emerging from ongoing research in Canada. This leading-edge research network is committed to giving Canadian processors competitive advantages. It has developed varieties of grains and oilseeds that possess superior protein composition and processing characteristics.

The development of canola oil is an excellent example of Canadian research efforts. It has become a popular vegetable oil worldwide, both for direct consumption and for use as an ingredient in processed food.

Canadian grains and oilseeds processing industries include: wheat, corn and oat milling; malting; canola and soybean crushing for meal and oil; and the production of biscuit, breakfast cereal, pasta, gluten and starch. Current technology emphasizes quality and production in these areas, and is adaptable for use around the world.

SEAFOOD AND AQUACULTURE

New processing technologies and product innovations are transforming Canada's seafood processing and export industry. Canada is a world leader in processing seafood such as salmon, roe, prawns, lobster, surf clams, geoduck, scallops, crabs, herring, black cod, and other groundfish and shellfish species. It also leads in the processing of by-products for new food ingredients and

industrial products such as chitin, chitosan and bi-polymer chemicals used in industries ranging from pharmaceuticals to water treatment.

Innovative processing management and advanced technology have responded to and mitigated the effects of the decline of some groundfish stocks in Canada. The industry has combined new overseas product sources and a greater emphasis on aquaculture products and services to strengthen its position in the marketplace; sales are in excess of $3 billion annually. Often, alliances forged with foreign firms have created new sources of supply and created new market opportunities.

MEAT AND ANIMAL GENETICS

Canada is a supplier of high-quality meats to world markets. The experience of Canadian livestock producers and meat processors and the application of state-of-the-art technology have contributed to Canada's reputation for excellence. Canada continues to develop new processing technologies in areas that include the handling, preservation and packaging of finished product. Canadian firms export both technology and consumer products.

Canada's two major red meat sectors are beef and pork. With 14 percent of the world market, Canada is the world's third-largest pork exporter ($1.1 billion in 1996). The Canadian beef industry is also an important player on the world stage. In 1996, $777 million in exports made it the world's sixth-largest beef exporter. The strength of these sales is based on efficient production methods and access to economical feed, modern technology, strict inspection standards, and Canada's superior breeding stock.

Canadian sales of dairy, beef and swine genetics were valued in excess of $206 million in 1996. Superior genetics, combined with the excellent health status of Canada's livestock, has resulted in sales to more than 70 countries.

Canada's meat processors specialize in products made from red meats, including beef, veal, pork, lamb and horse. Meat processing companies create a wide variety of meat products ranging from fresh or frozen meat to processed, smoked, canned and cooked meats, as well as sausage and deli meats.

PROCESSED FOODS AND BEVERAGES

Canadian consumer-oriented exports have grown significantly over the last few years, with the value of annual exports increasing from $5.8 billion to $6.7 billion between 1995 and 1996.

Meat and poultry products top the list of shipments by Canadian processors, followed by dairy and cereal products, including flour, baked goods, breakfast cereals, feeds and pasta. Other important exports include wines and spirits, fruits and vegetables, seafood products, soft drinks, confectioneries, vegetable oils and snack foods. Canadian firms are world leaders in quality and safety programs, such as Hazard Analysis Critical Control Point (HACCP)-based inspection.

Canadian companies make good partners. While Canada's larger processors ship a variety of foods, many smaller firms have become competitive by using flexible processing equipment and adaptable production facilities. This flexibility often allows them to produce a variety of products. By adjusting production facilities, smaller firms can process private-label brands for retailers and other manufacturers under co-packing agreements and can respond more quickly to specialized product and market opportunities.

RESEARCH AND DEVELOPMENT

Canadian advances in food and beverage processing have been second to none. Canadian universities, industry-funded centres of excellence, and government research institutions all conduct R&D, and all collaborate closely with researchers in individual firms.

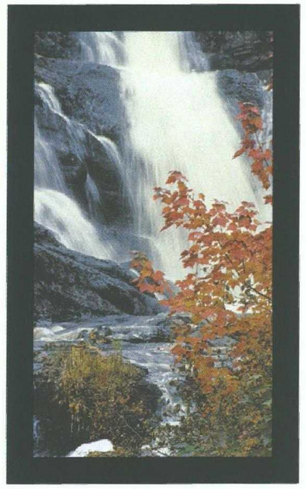
The cost of R&D in Canada is very competitive. In addition, Canada's academic and government research institutions house an impressive array of research professionals in food sciences and related disciplines. These institutions, composed of 11 universities and 18 federal agri-food research centres, network with each other to create a series of multi-disciplinary research teams that work in partnership with industry clients.

Canadians are clearly the main beneficiaries of such a dedicated approach to technological innovation in the food and beverage industry. However, because this industry welcomes investment in Canada and partnerships abroad, entrepreneurs and consumers in other countries are also taking advantage of Canadian advances in this field. For more details, check the Internet at http://www.agr.ca/research/branch/

Environmental Industries

Canadians have a strong attachment to their environment. They wish to preserve the quality of their air and water, protect nature and conserve wildlife. Public opinion polls in Canada consistently show that the environment is a high priority for Canadians. Nearly all Canadians believe that governments and corporations should show greater concern for the world's ecology. These concerns in Canada — and similar concerns in other countries — have helped to foster a Canadian environmental industry that has a reputation for innovative approaches to ecological challenges.

Approximately 4500 Canadian firms are active in the environmental industry. These firms earned about $16.7 billion in 1995, of which $4.8 billion came from the sale of manufactured goods such as membranes for water treatment, heat exchangers, ventilation systems, recycling equipment, alternative fuel vehicle components and hydro turbines. About $9 billion came from the sale of services such as consulting and environmental and energy engineering, as well as a wide range of scientific and technical services. These included spill prevention and clean-up, geomatics, remote sensing, waste management, laboratory testing and general research. Environment- related construction activities generated $2.8 billion in revenues.



Most countries recognize that economic growth and environmental protection go hand in hand. While many nations are quickly developing their own capabilities, they also need efficient and workable innovations in services and equipment.

Clients and joint-venture partners around the world are looking to Canadian companies to provide the needed expertise for a wide range of environmental undertakings, whether they involve soil, water or air. More than 800 of Canada's environmental companies are active exporters, and Canada is a world leader in environmental services, biotechnology, remediation, monitoring and instrumentation.

WASTEWATER MANAGEMENT

Canadian industrial wastewater management firms, associated research and development centres, and universities have developed expertise and technical solutions for complex municipal and industrial water and wastewater treatment requirements. Some processes and applications in which Canadian firms specialize include:

PROCESS	APPLICATIONS
Anaerobic technology	Energy recovery that offers a significant cost savings
Sequencing batch reactor technology	Effluent treatment that produces a highly sanitized result and offers significant cost savings
Biological nutrient removal	Phosphorus removal to less than 0.3 mg/L and nitrogen removal to 1 mg/L at temperatures of less than 10°C

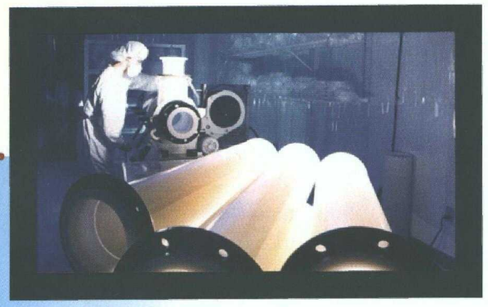


Photo courtesy of the Canada Export Award Program

Reciprocating ion exchange	Metal ion recovery for recycling with payback periods as short as one year
Membrane systems	Separation and recovery of valuable feed stock to save on treatment costs
Automated polymer dosing	Sludge dewatering that offers up to a 40-per-cent polymer savings
Ultraviolet oxidation	Destruction of complex synthetic organic compounds for re-treatment and/or post-treatment of industrial effluent and remediation of contaminated aquifers
Ultraviolet disinfection	Cost-effective and "environmentally friendly" control of bacteria in effluent and industrial process waters
Wet air oxidation	Compact technology for breakdown of complex organic compounds
Wastewater treatment plant modelling	Realistic, dynamic modelling for process design and operation control of wastewater treatment plants

CANADA IS A WORLD LEADER IN ENVIRONMENTAL SERVICES, BIOTECHNOLOGY, REMEDIATION, MONITORING AND INSTRUMENTATION.

AIR QUALITY MANAGEMENT

The majority of air quality management equipment manufactured by Canadian companies can be grouped into four categories: filters, extractors, specialized scrubber components and precipitators. Canadian companies have expertise in managing sulphuric emissions and the effects of acid rain, as well as in advanced industrial filtering systems.

Canadian air-quality management firms have developed innovative, cost-effective solutions in emerging sectors, including:

- CONTINUOUS EMISSIONS MONITORING WITH PROCESS CONTROLS
- BIOFILTRATION
- CLEAN INCINERATION TECHNOLOGIES
- HOT-GAS CLEANING USING ADVANCED PARTICLE FILTERS
- INDOOR AND AMBIENT AIR TECHNOLOGIES

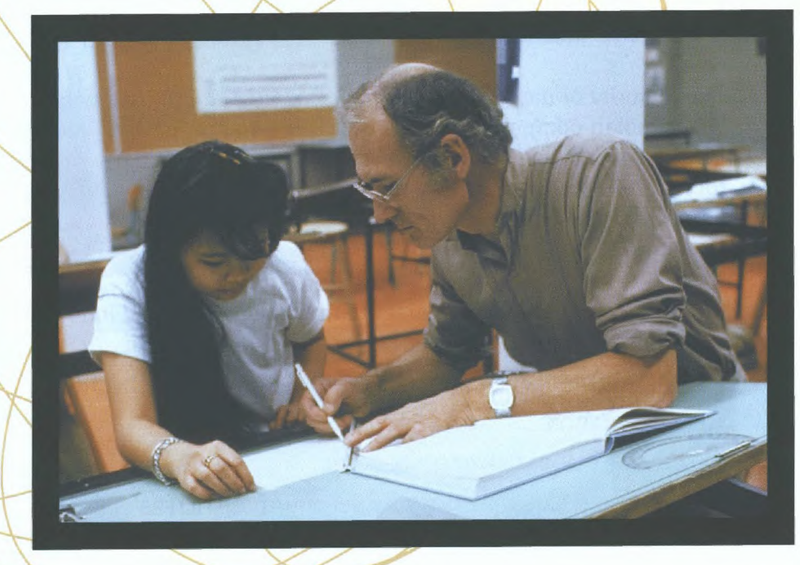
SOLID WASTE MANAGEMENT

Currently 80 percent of municipal and industrial solid waste in Canada is disposed of by landfilling. The remainder is disposed of through recycling, resource recovery and incineration. More stringent regulations in many countries have made solid waste management one of the fastest-growing sectors of Canada's environmental industry. While the emphasis to date of Canadian companies has been on the North American marketplace, Canadian solid waste equipment and services are shipped worldwide.

Canadian expertise in solid waste management includes:

- COMPOSTING AND RECYCLING TECHNOLOGIES
- MATERIAL RECOVERY FACILITIES
- INCINERATION
- WASTE-MANAGEMENT PLANNING
- SLUDGE MANAGEMENT
- SOIL REMEDIATION
- LANDFILL AND LINER DESIGN
- HAZARDOUS WASTE DISPOSAL

Education, Arts and Culture



EDUCATION

In the modern knowledge-based economy, a highly educated and trained work force is one of the most important resources in making a country competitive. Canada has gained international respect and admiration for the excellence of its educational system. Successful graduates from Canadian universities and colleges are now providing leadership in many governments and businesses around the world.

Canadians have always placed a premium on education and demanded first-rate schools. They spend more per capita on their education system than any other country in the Organization for Economic Co-operation and Development (OECD): 7.1 percent of gross domestic product compared with an average of 6.1 percent in other OECD countries.

Many Canadian universities — such as British Columbia, Alberta, Queen's, Toronto, McGill, Laval, Montreal, Dalhousie and Waterloo — are widely known and respected around the world. While perhaps not as well known, comparable programs are offered at dozens of other Canadian universities, including Simon Fraser, Lethbridge, Calgary, Manitoba, Concordia, New Brunswick, St. Mary's and Memorial. A consistent level of top-quality programs is offered at all schools. Instruction is available in either English or French, and at some institutions in both languages.

INTERNATIONAL STUDENTS WHO HAVE STUDIED IN CANADA SPEAK GLOWINGLY OF THE COUNTRY'S SAFE AND CLEAN SURROUNDINGS, ITS HIGH QUALITY OF EDUCATION, AND THE FRIENDLY WELCOME THEY RECEIVE FROM CANADIANS.

Canada's community colleges, which offer training toward specific careers, complement the country's university system. Often their training is technical and provides hands-on experience. Many Canadian students are now combining university degrees with college degrees to ensure that they obtain the highest level of academic qualifications and specific training in a targeted job sector.

Learning is a lifetime occupation in Canada. Many Canadians undertake mid-career training through continuing education courses to upgrade their qualifications, acquire new professional skills and keep pace with changes in technology and with new theories and practices in the work place. Canadian educational institutions and corporations have designed courses specifically to meet the needs of a rapidly changing work force.

In 1996, Canadian educational institutions attracted 59 200 international students at the post-secondary level: 22 500 to colleges and trade schools and 36 700 to universities.

International students who have studied in Canada speak glowingly of the country's safe and clean surroundings, its high quality of education, and the friendly welcome they receive from Canadians. Most overseas students are also happy that the weather is not as severe as they anticipated and that clothing and housing are adapted to the climate. Most Canadian cities are no colder than those of the northern United States. With four distinct seasons, Canada offers a wide range of outdoor activities, including skiing, skating, hiking, swimming, cycling and sailing.

Tuition fees for international students vary among institutions and programs of study. In many cases, fees are lower than those in the United States, the United Kingdom, Australia and New Zealand, while the quality of education remains excellent.

A network of Canadian Education Centres (CECs) has been established to provide professional assistance to recognized education and training institutions to market their programs. CECs located in Seoul, Taipei, Hong Kong, Bangkok, Jakarta, Kuala Lumpur, Singapore, Canberra, New Delhi and Mexico are designed to help match the interests and need of international students with the resources available at Canadian schools. These CECs, plus a centre in Beijing, help businesses and governments secure corporate and group training from Canadian suppliers and as well as facilitate links with Canadian schools. The centres are operated by the CEC Network in co-operation with the Government of Canada. The Canadian embassies in Athens and Caracas provide similar educational services outside of the CEC Network. The Canadian government plans to open additional education centres in the coming years.

Because Canada is a huge country, distance education allows people in remote areas to pursue their studies by correspondence with institutions throughout Canada. Many Canadian educational institutions are actively involved in the emerging field of distance education. Several schools are examining the possibility of offering such studies overseas. In some cases, Canadian telecommunications suppliers and educational institutions are working with foreign ministries of education to make distance learning possible from cities around the world.

Canadian educational institutions offer an unbeatable combination, including:

- EDUCATION THAT MEETS THE HIGHEST INTERNATIONAL STANDARDS;
- PRESTIGIOUS, INTERNATIONALLY RECOGNIZED DEGREES;
- TRAINING IN NEW TECHNOLOGIES, THEORIES AND PRACTICES FOR MID-CAREER UPGRADING;
- REASONABLE FEES;
- A SAFE, CLEAN, FRIENDLY ENVIRONMENT; AND
- THE COMPANY OF MANY OTHER INTERNATIONAL SCHOLARS.

ARTS AND CULTURE

Canada has successfully entered the international stage as it shares its rich cultural heritage through film, music, art and literature. Canadian authors, film producers and artists have won international acclaim, receiving some of the world's most prestigious prizes. Canadian cultural industries are producing high-quality products that are distinctively Canadian and have universal appeal. Growth in all cultural industries has been outstanding over the past five years.

Rapid growth in exports has taken place in virtually all sectors of Canadian cultural industries, as a result of increased industry productivity and global awareness of Canada's cultural heritage. The recording industry has witnessed a growth in exports by 324 percent between 1990 and 1995. Export sales of books, in both English and French, tripled between 1991 and 1995. Exports of Canadian films also tripled over the same period. Supported by first-rate technology in areas such as telecommunications, broadcasting and multimedia, the industry is well poised to continue this growth.

PUBLISHING

The high quality of Canadian books is recognized internationally and compares favourably with books produced by Canada's main competitors. Canada's 350 publishers and exclusive agents sold over $1.8 billion worth of product in 1994-95, ranging from books by Margaret Atwood, winner of France's Order of Arts and Letters, and Michael Ondaatje, winner of the Booker Prize, to Harlequin Romances. Canada has an excellent repertoire of children's books and an illustrious body of literature from English and French Canada. Canadian publishing also encompasses periodicals and trade/text books.

CANADIAN AUTHORS, FILM PRODUCERS AND ARTISTS HAVE WON INTERNATIONAL ACCLAIM, RECEIVING SOME OF THE WORLD'S MOST PRESTIGIOUS PRIZES.

Between 1991 and 1995, export of Canadian books has tripled, increasing from $40.5 million to $124 million. To enhance publishers' success around the world, the Association for the Export of Canadian Books co-ordinates the publishing industry's presence at major international book fairs such as Guadalajara, Frankfurt, Bologna and BookExpo America (Chicago), and produces a series of publications aimed at promoting Canadian publishers works worldwide. In partnership with the Department of Canadian Heritage, the Association administers programs of assistance intended to develop and sustain Canadian publishers activities abroad. The Association also organizes workshops on foreign book markets to better acquaint publishers with opportunities available internationally.

The production of many Canadian publications in both English and French enhances the export capability of this industry. As an officially bilingual nation, Canada has special expertise in developing didactic materials for teaching English and French as second languages.

MUSIC

Canada is the seventh-largest market for recorded music in the world with sales of over $900 million in 1996. Six major multinational firms, as well as 200 independent recording companies, operate in Canada. The Canadian music industry also benefits from producing for both English- and French-speaking markets. Canada is the world's second-largest producer of French-language recordings after France and the third-largest producer of English recordings after the United States and the United Kingdom. In addition, more than 200 titles of Canadian Aboriginal music are available. While home to many recording artists of international acclaim, Canada is also known in the international recording industry for its expertise in recording studio technology.

BROADCASTING

Broadcasting is one of the largest and fastest-growing components of Canada's cultural industries. Preliminary estimates by Statistics Canada indicate that Canadian-based revenues for film, video and television programming exports reached approximately $300 million in 1995, the fifth consecutive year of growth. In 1995, the industry contributed over $5 billion to Canada's GDP. Canada has three national English television networks and three French networks, several provincial educational television services, 22 specialty programming services, one regional French specialty service, one national french specialty service, two regional third-language specialty services, five pay-TV services, three pay-per-view services and two direct-to-home satellite licensees. Canada also operates the international radio and broadcasting service, Radio Canada International, and is one of the founding partners of TV-5, the international French-language television service seen around the world. In 1995 more than 100 private television stations were operating in Canada, with total revenues of over $1.5 billion.

Canada's team approach to working with international partners within the framework of co-production agreements is a key to its international success. Many Canadian broadcasters have entered into programming alliances with partners in Asia and Latin America and sell their programming in more than 100 countries. Similarly, Canadian independent television producers co-produce programming with partners in Europe, Latin America and Asia. Such Canadian television programs as "Anne of Green Gables" and "Due South" are seen around the world, from Japan to Germany.

As new cable and pay-TV services emerge around the world, Canadians are well equipped to provide their expertise in cable TV, broadcasting via satellite, and pay-TV services. Many Canadian television programming service holdings are active in international markets, including Australia, New Zealand and Ireland.

FILM AND VIDEO

International partners are attracted to Canada's expertise in the filmmaking industry, and Canadian companies are active in sharing this expertise. Canada has over 30 official audio-visual co-production agreements with international partners, which have led to wider distribution and success in international media. Moreover, Canada's highly skilled technical services and excellent infrastructure have made Canada a major centre for film location shooting. The influence of dynamic Canadian filmmakers such as Atom Egoyan, David Cronenberg and Claude Gagnon continues to grow in international markets in Europe, Asia and Latin America.

MULTIMEDIA

There are more than 500 producers of multimedia of varying specializations in Canada. Canada has the right mix of education, content, technology, infrastructure, skills and savvy to nurture multimedia development. Canadian-based companies such as Alias, SoftImage and Corel have been in the forefront of developing graphics, animation and special-effects software, while courses such as the animation program at Sheridan College in Toronto offer students a world-class education in this highly specialized area. It is estimated that 60 percent of the software used in Hollywood was developed in Canada. Many Canadian companies, such as McGill Multimedia, Animatics and DNA Multimedia, are recipients of international awards, such as the New Media Invision Award and International Digital Media Awards. Canada is well positioned to take advantage of the opportunities offered by the emergence of new media.

VISUAL AND PERFORMING ARTS

Canada's rich collection of visual artwork is gaining increased international recognition with its high quality and its wide range of styles and media. Canada's contemporary artists are invited to participate in major international events such as the Venice Biennale, São Paolo Biennale, Sydney Biennale, and Documenta in Kassel. For instance, Edward Poitras represented Canada at the 1995 Venice Biennale, and Jeff Wall's work is being shown in Europe and the United States.

Canadians enjoy and collect works of art to decorate their lives and make personal cultural statements, but the visual arts also have a domestic and international business dimension. According to Statistics Canada, in 1994, domestic exports of Canadian art (goods originating in Canada) were $41 million; re-exports of art not originating in Canada amounted to $34 million. Canada's national association of art dealers, the Professional Art Dealers Association of Canada (PADAC) promotes Canadian art and artists around the world. To enhance the success of artists and galleries abroad, PADAC supports the participation of the industry in international art events. Art fairs are key to familiarizing international art collectors, dealers and curators with Canadian arts and crafts. Canadian art galleries are participating in growing numbers in these fairs held annually, recognizing that venues such as Chicago, Madrid, New York, Berlin and Basel represent prime markets.

CRAFT

The export of Canadian arts and crafts is a growth sector thanks in large part to the creativity of Canadian artists and the quality of their products. There are about 250 to 300 export-ready craft and giftware producers in Canada. The average-sized operation is estimated to be one to six employees, with total employment estimated at about 25 000.

There is a developing interest in Canadian aboriginal arts and crafts in the United States, Western Europe and Japan. To date, efforts have been focussed on the German and U.S. markets, but there will be increased emphasis on the considerable potential offered by other European markets and Asia.

MUSEUM GOODS AND SERVICES

Canadian museums and museum consulting firms have achieved international recognition for their expertise in museum planning and managing, and in museum training programs. Institutions such as the Ontario Science Centre and the Royal Ontario Museum are consulted for their expertise on museum development and exhibits, and the Canadian Museum of Civilization actively exports its multimedia products and exhibition by-products.

Performing artists such as Canada's modern dance company La La La Human Steps, Canada's young Grammy winner Alanis Morissette, Quebec's extraordinary circus group Cirque du Soleil and concert pianist Louis Lortie regularly tour internationally.

International audiences are also drawn to Canada to witness the wide range of well-established cultural festivals that Canadian cities have to offer. Millions travel every year to enjoy such festivals as Montreal's International Jazz Festival, Stratford's Festival Theatre, Prince Edward Island's Charlottetown Festival and Toronto's Caribana festival, to name just a few.

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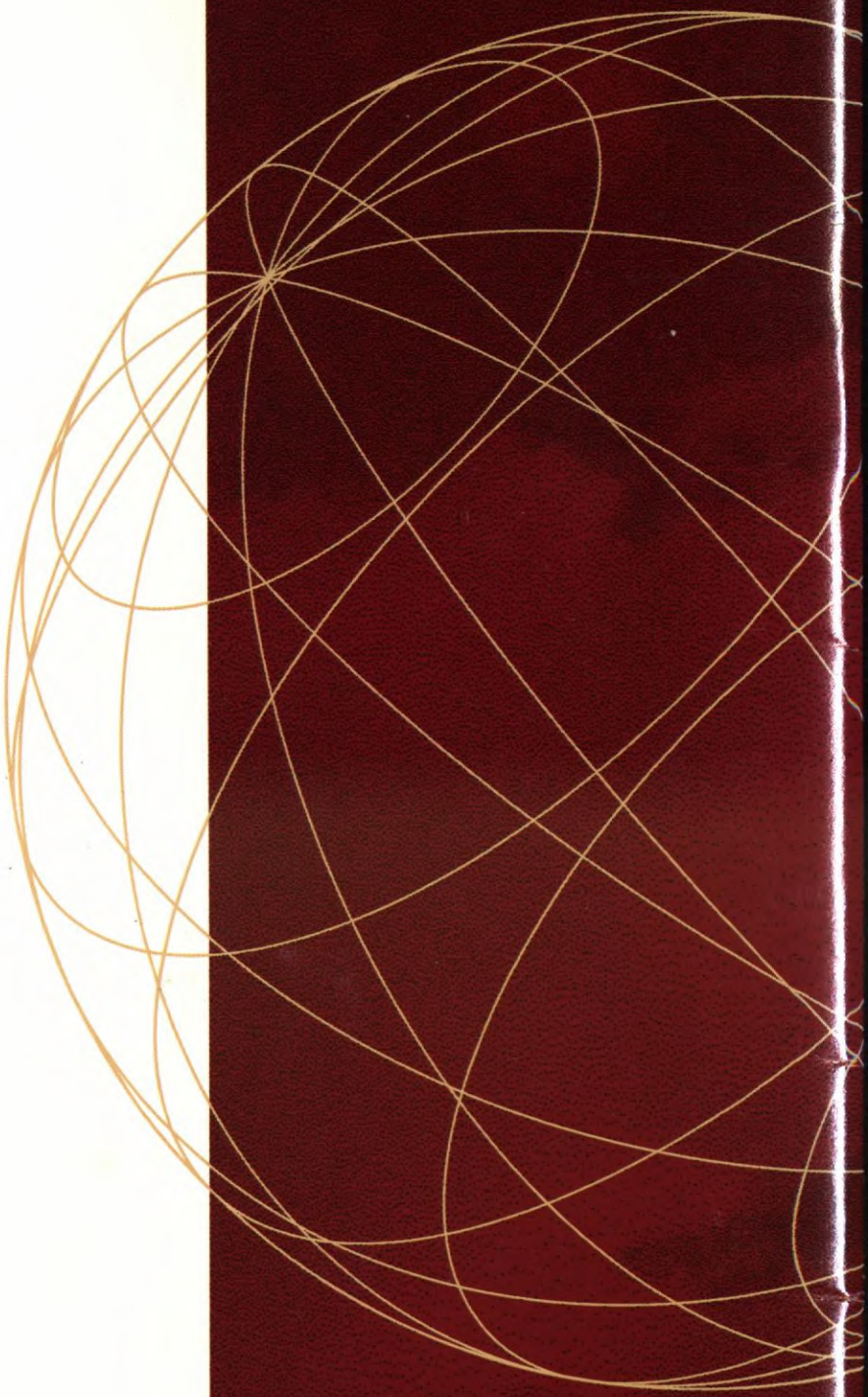
(* Office of the Canadian Chamber of Commerce.)

Canadian

EXCELLENCE



Department of Foreign Affairs
and International Trade

Ministère des Affaires étrangères
et du Commerce international