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External Affairs and
International Trade Canada

Affaires extérieures et
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1990/91
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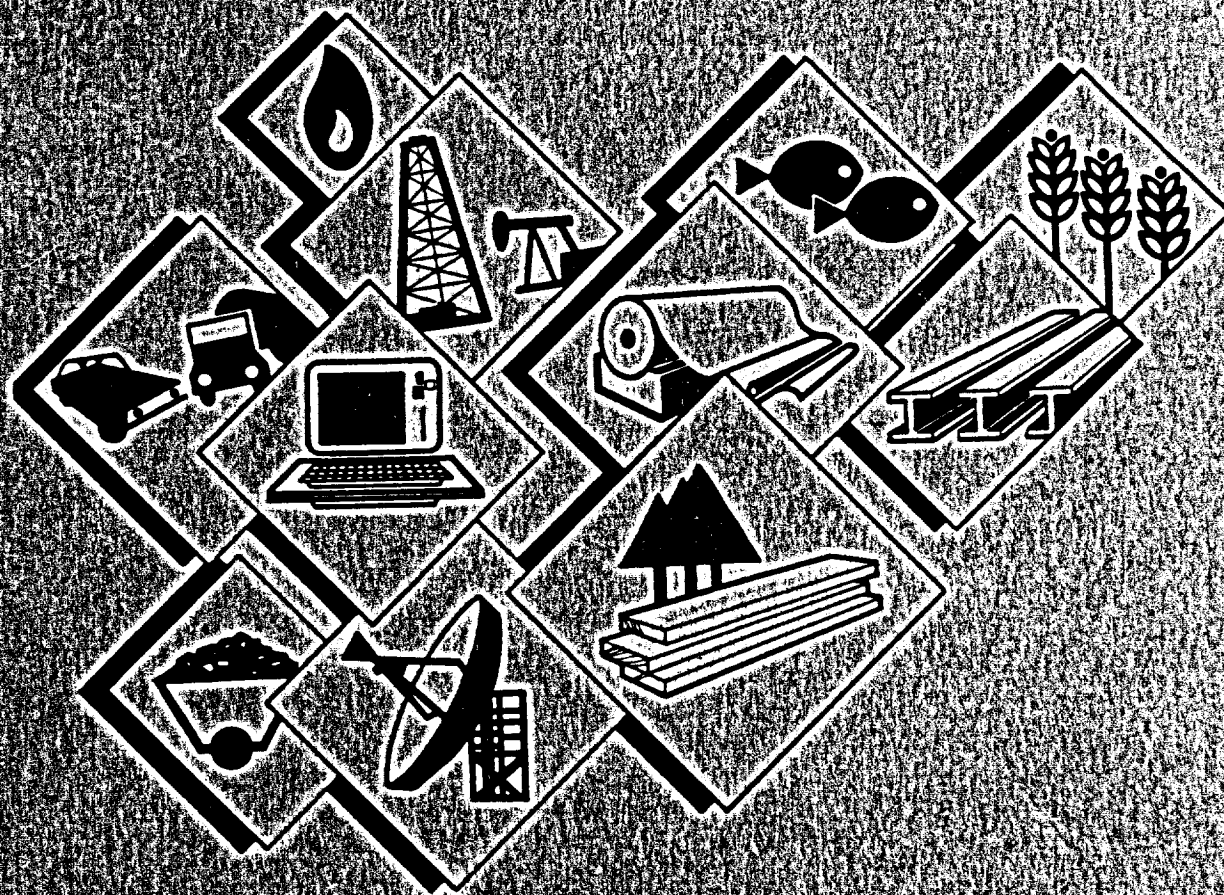
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GEOGRAPHICAL SYNOPSIS FOR CONSULTATION PURPOSES ONLY

UNITED STATES

1990-91 EXPORT AND INVESTMENT PROMOTION OPERATIONAL PLAN



JANUARY 1990

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

Dept. of External Affairs
Min. des Affaires extérieures
OTTAWA

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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 the United States for fiscal year 1990/91 commencing April 1, 1990.

The format of this synopsis is designed to provide Canadians involved in the process of export promotion the means to identify quickly the key components of the trade program of External Affairs and International Trade Canada missions and access conveniently those feature 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:

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

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 sectoral priorities for each market, profiles of important or interesting sectors as well as proposed 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 and International Trade Canada to facilitate the assembly of vast amounts of detailed information on world markets from some 92 missions abroad. It is programmed to make this information available to government in a format which would enable specific data on sectors or geographic regions to be accessed conveniently.

II

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 and expressed concern at the decline of Canada's share of world markets. 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 focused 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.

The purpose of this synopsis is to provide those engaged in the process of promoting exports from Canada the means to obtain condensed market 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 synopsis stimulate interest on the part of exporters, they are invited to seek out more detail information and further background direct from the post, the geographic and sectoral bureaux of the External Affairs and International Trade Canada or the International Trade Centres currently located within the provincial offices of Industry, Science and Technology Canada.

III

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 discussion 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
AND INTERNATIONAL TRADE CANADA
EXPORT AND INVESTMENT PROMOTION PLANNING SYSTEM
1990/91 GEOGRAPHIC SYNOPSIS
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RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: ATLANTA

Country: UNITED STATES OF AMERICA

The Atlanta post represents Canadian business interests in the southeastern states of Alabama, Florida, Georgia, Mississippi, North Carolina, South Carolina and Tennessee, as well as the Commonwealth of Puerto Rico and the U.S. Virgin Islands. This large region of 345,000 square miles and 42.6 million people is served, for trade and tourism purposes, by four separate offices - the Consulate General itself in Atlanta and its three one-man satellite trade offices in Orlando and Miami, Florida, and in San Juan, Puerto Rico.

During 1988, Canadian exports to this territory amounted to \$6.540 billion dollars led by sales of \$1.258 billion to Georgia, \$1.243 billion to North Carolina, \$1.184 billion to Florida, and \$1.025 billion to Tennessee. Combined export and import figures show that in total trade, North Carolina is Canada's most important regional partner at \$2.926 billion, followed by Florida (\$2.792 billion), Georgia (\$2.556 billion, and Tennessee (\$2.317 billion). Major exports include many traditional items such as newsprint, softwood lumber, and automotive parts but high-value added products such as transportation equipment, telecommunications equipment, and office machinery are playing an increasingly important role.

During the past year, growth in the southeastern "sunbelt" states slowed relative to the rapid expansion of the mid-1980's. However, the region continued to outpace that of the overall U.S. economy. Projections for 1990-91 indicate moderate growth slightly above the national average.

For the coming year, the addition of the two new satellite offices in South Florida and Puerto Rico will greatly enhance our ability to take advantage of opportunities in those two important markets. Efforts in the past had been constrained by distance - as the crow flies, Miami is the same distance from Atlanta as is London, Ontario, while San Juan equates to the distance to Winnipeg, Manitoba. The new resources will permit the Atlanta office to devote more attention to the important markets in the Carolinas, Tennessee, and Alabama which offer much untapped potential.

In light of our priority objective to help Canadian firms capitalize on the increased business opportunities in the U.S.A. under the Canada-U.S.A. Free Trade Agreement, the post will step-up its recruitment of Canadian participants in trade shows and missions, not only in Atlanta but in other key markets, especially North Carolina, Gulf Coast Alabama and Mississippi and Northern Alabama. Increased export promotion efforts will focus on electronics, machinery, aerospace, furniture, automotives, marine equipment and tourism. New activities in technology acquisition for Canadian firms to increase their international competitiveness will also be implemented along with recruiting U.S.A. investors into Canada.

As trade and demographic figures demonstrate, export opportunities are well-dispersed throughout the post territory (four states with over \$2 billion annual trade with Canada, 15 urban centres with over 1/2 million population). These facts point to the desirability of establishing additional satellite offices in the region, particularly in Raleigh/Durham/Research Triangle Park, North Carolina and in Huntsville, Alabama. The post will prepare satellite office recommendations with a view to implementation in FY 90/91.

The post will continue to rely heavily on promotional projects as a means of furthering our trade, investment and technology goals. The post

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RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: ATLANTA

Country: UNITED STATES OF AMERICA

has developed, and will expand its use of, new promotional techniques to manage Canadian company participation in promotional projects to ensure that the desired objectives are achieved.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 EXPORT PROMOTION PRIORITIES

Mission: ATLANTA

Country: UNITED STATES OF AMERICA

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 telecom firms have 50% market share in central office switching equipment and a 40% market share in customer premise equipment. This installed base and compatibility of Canadian standards provide outstanding opportunities for increased sales of Canadian peripherals and upgrades.
2. **DEFENCE PROGRAMS, PRODUCTS, SERV**
Large military commands and many large defence prime contractors are located in the territory. Florida is the fourth-ranked state in defence spending.
3. **TRANSPORT SYS, EQUIP, COMP, SERV.**
Automotive parts, urban transit equipment, and recreational marine equipment all offer outstanding export opportunities.
4. **AGRI & FOOD PRODUCTS & SERVICE**
The growing market of the Southeast U.S. is becoming more diversified and sophisticated, willing and eager to accept new food products. Distribution channels are changing, offering opportunities for new/small exporters to enter the market.
5. **CONSTRUCTION INDUSTRY**
Construction activity in the Southeast, particularly in the resort areas of southern Florida and Puerto Rico, is expected to continue at a rate above the national average, offering excellent opportunities for the sale of all types of building materials.
6. **INDUSTRIAL MACHIN, PLANTS, SERV.**
Southeastern manufacturers are due for major modernization of machinery and equipment in 1990's. The next several years should offer an expanding market and an excellent opportunity to get in at an early stage in the buying cycle.

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. TRANSPORT SYS, EQUIP, COMP, SERV. | 5. CHEM PROD & PETROCHEM, EQP, SERV |
| 3. MINE, METAL, MINERAL PROD & SRV | 6. OIL & GAS EQUIPMENT, SERVICES |

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ATLANTA

Market: UNITED STATES OF AMERICA

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	50420.00 \$M	50500.00 \$M	50580.00 \$M	50605.00 \$M
Canadian Exports	322.00 \$M	330.00 \$M	336.00 \$M	342.00 \$M
Canadian Share of Market	0.64 %	0.65 %	0.66 %	0.69 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	95.00 %
BRAZIL	0.50 %
FRANCE	0.40 %
AUSTRALIA	0.30 %
UNITED KINGDOM	0.30 %

Current Status of Canadian

exports in this sector/subsector: Well established and growing

Products/services for which there are good market prospects:

1. Fancy food
2. Bakery products
3. Frozen 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
- Trade Fair activity
- Provincial export promotion
- Competitive pricing
- Strong sectoral capability in Canada
- Bilateral economic trade agreement

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ATLANTA

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- 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: Publix in-store promotion

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

Activity: Puerto Rico Food & Equipment Show
Expected Results: 10 new companies introduced to market

Activity: Florida Restaurant Association Show
Expected Results: 4 new companies

Activity: Georgia Hospitality Show
Expected Results: 10 new 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: Introduce companies from the Maritimes to markets in NC, FL, GA
Expected Results: Enhance sales of products to these areas.

Activity: Survey new shows

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ATLANTA

Market: UNITED STATES OF AMERICA

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	2296.00 \$M	2352.00 \$M	2412.00 \$M	2413.00 \$M
Canadian Exports	183.00 \$M	187.00 \$M	192.00 \$M	195.00 \$M
Canadian Share of Market	8.00 %	8.00 %	8.00 %	8.00 %

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 %
MEXICO	3.00 %
ECUADOR	3.00 %
TAIWAN	2.00 %
JAPAN	1.00 %
KOREA	1.00 %

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

Products/services for which there are good market prospects:

1. Fresh fish
2. Shellfish
3. Value added 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
- Trade Fair activity
- Provincial export promotion
- Competitive pricing
- Strong sectoral capability in Canada
- Bilateral economic trade agreement

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ATLANTA

Market: UNITED STATES OF AMERICA

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: Survey of Hispanic market for fishery products
Expected Results: Inform exporters of market opportunities

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

Activity: Seafare Southeast
Expected Results: 10 new 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: Introduce companies from the Maritime Provinces into various segments of the market
Expected Results: Enhance export of fish/shellfish to GA, FL, NC markets

Activity: Survey of new trade shows in sector
Expected Results: Identify suitable shows for Canadian participation

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ATLANTA

Market: UNITED STATES OF AMERICA

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	5600.00 \$M	5600.00 \$M	5600.00 \$M	5600.00 \$M
Canadian Exports	165.00 \$M	165.00 \$M	200.00 \$M	220.00 \$M
Canadian Share of Market	2.90 %	2.90 %	3.60 %	3.90 %

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

Major Competing Countries Market Share

UNITED STATES OF AMERICA	88.00 %
UNITED KINGDOM	3.10 %
GERMANY WEST	1.60 %
JAPAN	1.00 %
SINGAPORE	1.00 %
FRANCE	0.90 %

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

Products/services for which there are good market prospects:

1. Electronic sub-systems
2. Simulation and training equipment
3. Air defense systems
4. Milspec 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
- Strong sectoral capability in Canada
- Bilateral economic trade agreement

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ATLANTA

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- Large investment required
- to meet military specifications

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

Activity: Complete calls on all military commands

Activity: MICOM Working Group follow-up

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

Activity: Suntech/Dec

Expected Results: Introduce 10 new Cdn. companies to market

Activity: Subcontractor Conference

Expected Results: Introduce 5 U.S. prime contractors to Cdn. capability

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

Activity: Establish Working Groups at 2 other major commands

Expected Results: New DDSA proposals

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ATLANTA

Market: UNITED STATES OF AMERICA

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: INSTRUMENT & PROCESS CONTROLS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1250.00 \$M	1380.00 \$M	1420.00 \$M	1448.00 \$M
Canadian Exports	37.00 \$M	38.00 \$M	41.00 \$M	46.00 \$M
Canadian Share of Market	3.00 %	3.00 %	3.00 %	3.00 %

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

Major Competing Countries Market Share

UNITED STATES OF AMERICA	60.00 %
JAPAN	12.00 %
EUROPE	12.00 %
KOREA	3.00 %
TAIWAN	3.00 %
SINGAPORE	3.00 %

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

Products/services for which there are good market prospects:

1. Electro Optics
2. Instrumentations
3. Process Controls
4. Component Storage Systems
5. CAD/CAM Hardware
6. Robotics

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ATLANTA

Market: UNITED STATES OF AMERICA

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
- Strong sectoral capability in Canada
- Bilateral economic trade agreement
- Willingness of exporters to invest/joint venture in territory
- Technology transfer

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: Outgoing mission to Huntsville, AL
Expected Results: 10 Cdn coys introduced to market

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

Activity: Fiber Tour/Local Network Atlanta
Expected Results: 5 new Cdn companies introduced to market

Activity: TABES Expo, Huntsville, AL
Expected Results: 5 Cdn companies introduced to market

Activity: Bobbin Show
Expected Results: Establish 50 new local contacts

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ATLANTA

Market: UNITED STATES OF AMERICA

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

Activity: Workshops/Seminar

Expected Results: 5 Cdn companies introduced to end users.

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

South Carolina Industry Show	Approximate Value:	2 M\$
	Financing Source :	
	Contact :	

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ATLANTA

Market: UNITED STATES OF AMERICA

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	5200.00 \$M	5800.00 \$M	6500.00 \$M	7300.00 \$M
Canadian Exports	273.00 \$M	290.00 \$M	365.00 \$M	390.00 \$M
Canadian Share of Market	5.20 %	5.00 %	5.70 %	6.00 %

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 %
JAPAN	20.00 %
GERMANY WEST	15.00 %
SINGAPORE	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. Integrated Services Digital Network (ISDN) Terminals
2. Packet assemblers/disassemblers for data trans.

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
- Strong sectoral capability in Canada
- Bilateral economic trade agreement
- Competitive Canadian financing

Factors for Canadian exports not reaching market potential:

- Intense price competition
-

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ATLANTA

Market: UNITED STATES OF AMERICA

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

Activity: Telecommunications incoming mission to province of Quebec
manufacturers
Expected Results: Establish new buying connection

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

Activity: Establish Cdn. telecomm/computer working group for dissemination of trade leads
Expected Results: Expedite market intelligence sharing for common good of all
Activity: Cdn companies operating in southeast

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ATLANTA

Market: UNITED STATES OF AMERICA

Sector : POWER & ENERGY EQUIP. & SERV.

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1750.00 \$M	1830.00 \$M	1885.00 \$M	1955.00 \$M
Canadian Exports	18.50 \$M	18.80 \$M	19.20 \$M	20.50 \$M
Canadian Share of Market	0.90 %	1.00 %	1.00 %	1.10 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	75.00 %
EUROPE	10.00 %
JAPAN	3.00 %

Products/services for which there are good market prospects:

1. Transmission & Distribution Equipment
2. Engineering
3. Hydro & Thermal Eng.
4. Nuclear Equip.
5. Control Equip.
6. Alternative Energy
7. Electrical Machinery

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:

- Lack of promotion and advertising
- _____
- _____

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ATLANTA

Market: UNITED STATES OF AMERICA

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

Activity: Transmission & Distribution Show
Expected Results: 10 new Cdn coys

Activity: GE Automation of Nuclear Mfg.
Expected Results: 3 engineers

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

Activity: Buying mission from GE to Canada
Expected Results: Nuclear mfg. coys

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DEPARTMENT OF EXTERNAL AFFAIRS

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ATLANTA

Market: UNITED STATES OF AMERICA

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

Power Engineering

Approximate Value: 5 M\$
Financing Source :
Contact :

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ATLANTA

Market: UNITED STATES OF AMERICA

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	10000.00 \$M	10000.00 \$M	10000.00 \$M	10000.00 \$M
Canadian Exports	580.00 \$M	600.00 \$M	600.00 \$M	620.00 \$M
Canadian Share of Market	5.80 %	6.00 %	6.00 %	6.20 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	0.00 %
JAPAN	0.00 %
TAIWAN	0.00 %
KOREA	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. OEM Automotive Parts
2. Aftermarket parts
3. Aftermarket accessories

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

Factors for Canadian exports not reaching market potential:

- _____
- _____

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ATLANTA

Market: UNITED STATES OF AMERICA

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 and visit Tier I and Tier II suppliers to auto assembly industry

Expected Results: Increase exports of auto parts and sub-assemblies

Activity: Update list of aftermarket reps and distributors

Expected Results: Increase exports of aftermarket parts and accessories

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ATLANTA

Market: UNITED STATES OF AMERICA

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	1000.00 \$M	200.00 \$M	180.00 \$M	180.00 \$M
Canadian Exports	200.00 \$M	120.00 \$M	120.00 \$M	20.00 \$M
Canadian Share of Market	20.00 %	66.00 %	66.00 %	11.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	0.00 %
GERMANY WEST	0.00 %
CANADA	0.00 %
JAPAN	0.00 %
FRANCE	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. Transit coaches and rail vehicles
2. Electronic support systems
3. Consulting services

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
- Competitive Canadian financing

Factors for Canadian exports not reaching market potential:

- _____
- _____

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ATLANTA

Market: UNITED STATES OF AMERICA

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

Activity: Lobbying (A) Florida Transportation Commission (B)Municipal Transit Authorities (C) Florida Transit Assoc.

Expected Results: Increased understanding of Canadian capability

Activity: Familiarization visits to Cdn industry by all of the above groups plus transit sector journalists

Expected Results: Cdn expertise, transit awareness & substantial downstream

Activity: 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: Survey of transit plans in territory

Expected Results: Inform Canadian industry

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ATLANTA

Market: UNITED STATES OF AMERICA

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: MARINE INDUSTRIES

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	607.00 \$M	623.00 \$M	638.00 \$M	638.00 \$M
Canadian Exports	5.60 \$M	5.70 \$M	5.90 \$M	5.90 \$M
Canadian Share of Market	0.92 %	0.91 %	0.92 %	0.92 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	90.00 %
TAIWAN	3.00 %
FRANCE	1.40 %
JAPAN	0.50 %
ITALY	0.50 %
NETHERLANDS	0.50 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. Sailboats
2. Accessories

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
- Bilateral economic trade agreement

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ATLANTA

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- 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: Ongoing follow-up to participation in 2 recreational marine shows
Expected Results: Additional export sales

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

Activity: Miami International Sailboat Show
Expected Results: Introduce 10 new companies

Activity: American Marine Trades Expo
Expected Results: Introduce 10 new 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: Arrange meetings between Cdn producers and local brokers, distributors, sales reps
Expected Results: Develop new contacts, enhance existing ones

Activity: Survey Ft. Lauderdale Int'l. Boat Show
Expected Results: Determine whether suitable for Cdn. participation

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ATLANTA

Market: UNITED STATES OF AMERICA

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	14300.00 \$M	14000.00 \$M	14000.00 \$M	14000.00 \$M
Canadian Exports	130.00 \$M	145.00 \$M	150.00 \$M	200.00 \$M
Canadian Share of Market	0.93 %	1.04 %	1.70 %	1.43 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	80.00 %
UNITED KINGDOM	2.00 %
FRANCE	2.00 %
GERMANY WEST	2.00 %
JAPAN	2.00 %
BRAZIL	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 parts
2. Commuter aircraft

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
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- Bilateral economic trade agreement

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ATLANTA

Market: UNITED STATES OF AMERICA

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: Aircraft maintenance parts purchase survey

Activity: Executive aircraft components

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 Cdn industry days on NASA sites in cooperation with Cdn Commercial Corp.

Expected Results: New bidding opportunities

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ATLANTA

Market: UNITED STATES OF AMERICA

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	5000.00 \$M	5000.00 \$M	5000.00 \$M	5000.00 \$M
Canadian Exports	750.00 \$M	750.00 \$M	750.00 \$M	750.00 \$M
Canadian Share of Market	15.00 %	15.00 %	15.00 %	15.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	0.00 %
CANADA	0.00 %
BRAZIL	0.00 %
EUROPE	0.00 %
JAPAN	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. Plywood

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
- Strong sectoral capability in Canada
- Bilateral economic trade agreement

Factors for Canadian exports not reaching market potential:

- _____
- _____

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ATLANTA

Market: UNITED STATES OF AMERICA

Sector : FOREST PRODUCTS, EQUIP, SERVICES

Sub-Sector: EQUIPMENT AND MACHINERY

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	412.00 \$M	432.00 \$M	455.00 \$M	465.00 \$M
Canadian Exports	44.00 \$M	49.00 \$M	52.00 \$M	55.00 \$M
Canadian Share of Market	11.00 %	11.00 %	11.00 %	12.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	50.00 %
EUROPE	12.00 %
JAPAN	7.00 %
SOUTH AMERICA	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. Logging equipment and machinery
2. Sawmill equipment and machinery
3. Pulp mill equipment and machinery

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:

- _____
- _____

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ATLANTA

Market: UNITED STATES OF AMERICA

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

Activity: Solo Forest Machinery & Equipment Show
Expected Results: 5 new 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: Outgoing Mission to Saw Mills
Expected Results: 5 new Canadian companies

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ATLANTA

Market: UNITED STATES OF AMERICA

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	10800.00 \$M	11700.00 \$M	12000.00 \$M	12500.00 \$M
Canadian Exports	12.02 \$M	14.00 \$M	16.00 \$M	17.00 \$M
Canadian Share of Market	0.11 %	0.12 %	0.13 %	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	75.00 %
HONG KONG	0.00 %
KOREA	0.00 %
ASIA OR FAR EAST	0.00 %

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

Products/services for which there are good market prospects:

1. Furs
2. Boutique apparel
3. Activewear
4. Leather
5. Designer sportswear

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
- Strong sectoral capability in Canada

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ATLANTA

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Unsuitable product
- 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 buyers who attended Festival of Canadian Fashion and Montreal Pret
Expected Results: \$20,000 export sales

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

Activity: Montreal Pret

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

Activity: Identification of agents and retailers
Expected Results: \$500,000 export sales

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ATLANTA

Market: UNITED STATES OF AMERICA

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	2717.00 \$M	2860.00 \$M	3000.00 \$M	3000.00 \$M
Canadian Exports	14.70 \$M	15.20 \$M	22.80 \$M	23.00 \$M
Canadian Share of Market	0.54 %	0.53 %	0.76 %	0.77 %

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

Major Competing Countries Market Share

UNITED STATES OF AMERICA	90.00 %
KOREA	0.00 %
TAIWAN	0.00 %
JAPAN	0.00 %
GERMANY WEST	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. Activewear
2. Gym, exercise and playground equipment
3. Swimming pools and accessories
4. Fishing tackle and accessories

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
- CIDA programs
- Competitive pricing
- Strong sectoral capability in Canada

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ATLANTA

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Unsuitable product
- Limited Canadian capabilities

- _____
- _____

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

Activity: Identification of major retailers
Expected Results: 10% increase in sales

Activity: Identification of new agents and distributors
Expected Results: 10% increase in sales

Activity: Letter of invitation to visit Canadian exhibit at Super Show
Atlanta

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ATLANTA

Market: UNITED STATES OF AMERICA

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	2992.00 \$M	2092.00 \$M	2320.00 \$M	2321.00 \$M
Canadian Exports	7.00 \$M	7.50 \$M	8.80 \$M	8.90 \$M
Canadian Share of Market	0.31 %	0.36 %	0.38 %	0.38 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	75.00 %
EUROPE	12.50 %
ASIA OR FAR EAST	12.00 %

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

Products/services for which there are good market prospects:

1. Medical disposables
2. Home care equipment
3. Hospital 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
- Provincial export promotion
- Competitive pricing
- Bilateral economic trade agreement

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ATLANTA

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- 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: Introduction of bio-technology oriented companies
Expected Results: Enhanced export sales

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

Activity: National Home Healthcare Expo
Expected Results: Introduction of 10 new 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: Survey of other trade shows in territory
Expected Results: Identification of suitable events

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ATLANTA

Market: UNITED STATES OF AMERICA

Sector : CONSTRUCTION INDUSTRY

Sub-Sector: BUILDING PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	11520.00 \$M	11600.00 \$M	12120.00 \$M	12700.00 \$M
Canadian Exports	891.00 \$M	904.00 \$M	1028.00 \$M	1080.00 \$M
Canadian Share of Market	7.70 %	7.80 %	8.50 %	8.50 %

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 %
TAIWAN	0.00 %
JAPAN	0.00 %
SINGAPORE	0.00 %
BRAZIL	0.00 %
EUROPEAN COMMON MARKET C	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. Construction machinery and equipment
2. Converted wood products
3. Softwood lumber
4. Products and equipment
5. Converted metal products
6. Doors and windows

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
- Strong sectoral capability in Canada
- Bilateral economic trade agreement

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ATLANTA

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ATLANTA

Market: UNITED STATES OF AMERICA

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	20560.00 \$M	22500.00 \$M	25000.00 \$M	27500.00 \$M
Canadian Exports	360.00 \$M	421.00 \$M	550.00 \$M	750.00 \$M
Canadian Share of Market	2.00 %	2.00 %	2.00 %	3.00 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	62.00 %
EUROPE	14.00 %
JAPAN	8.00 %
KOREA	4.00 %
TAIWAN	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. General machinery
2. Material handling
3. Environmental
4. Engineering
5. Metal processing
6. Robotics CAD CAM
7. Tools and hardware
8. Package equipment
9. Investments
10. Security equipment

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ATLANTA

Market: UNITED STATES OF AMERICA

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 Canadian financing
- Willingness of exporters to invest/joint venture in territory
- Tech transfer and licen-

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
 - Performance of local agent or representative
 - Distance of size of territory
 -
-

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: ATLANTA

Country: UNITED STATES OF AMERICA

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
Two years ago	5500.00	20.00	40.00
One year ago	6000.00	20.00	40.00
Current year	6000.00	20.00	40.00

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:

\$1,300 million (excluding portfolio investment)

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

- Other U.S. cities/states
- Western Europe
- Latin America
- Japan

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

- High quality advertising campaigns in business journals/
High level private sector missions led by senior political
figure/Sponsorship of various bus. forums, seminars/Missions
of inv. intermediaries & private companies/City, state, natl.
exhibits in targeted trade shows/Special incentive programs

IDP Partners and related program activities:

Lawyers

- Client referrals/seminar resource

Banks

- Client referrals

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: ATLANTA

Country: UNITED STATES OF AMERICA

IDP Partners and related activities cont d:

ISTC HQ/RO's

- Recruiting mission participants

Investment Canada

- Supporting client servicing

Technology organizations

- Client referrals/seminars/recruitment

Federal/state departments of commerce

- Seminar participation/contact development

Chambers of Commerce

- Seminar participation/contact development

Compared to major competitive destinations, Canada is perceived to have

the following advantages:

- Stable political environment
- Strong economy
- Familiar business practices
- Abundant resources/energy
- FTA

the following constraints:

- Small market easily served from U.S.A.
- Perceived high taxation
- Interprovincial barriers to trade
- Cold climate

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

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

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: ATLANTA

Country: UNITED STATES OF AMERICA

The mission believes that the following sectors are of greatest interest to investors in its territory/country an assigned ranking A = High B = Medium C = Low

Sector	Ranking
Agriculture/Food/Fish	A
Resource Processing	C
Machinery and Equipment	A
Transportation	A
Consumer Products	B
Commercial Service	C
Computer and Communications	A
Health Care Products/Medical	B
Aerospace and Defence	A
Strategic Technologies	B

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: ATLANTA

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

Seq #	Date
Type: MISSION OUT, INDUSTRY	
7	11/90
Event Description:	
Biotech mission to South Florida	
City :Miami	
Country :UNITED STATES OF AMERICA	
Investment Nature:Joint Venture	
Strat. Partnrg.	
Tech. Licensing	
Investment Sector:STRATEGIC TECHNOLOGIES	
Event Cooperants :	
DRIE, provinces, associations	
Estimated Budget : \$15,000.00	
Type: OTHER PROMOTION	
2	04/90
Event Description:	
CITEX 90 info booth	
City :Atlanta	
Country :UNITED STATES OF AMERICA	
Investment Nature:Joint Venture	
Strat. Partnrg.	
Tech Licensing	
Investment Sector:COMPUTER/COMMUNICATIONS	
Event Cooperants :	
DRIE, provinces, associations	
Estimated Budget : \$6,000.00	
5	01/90
Event Description:	
Homebuilders Show - info booth	
City :Atlanta	
Country :UNITED STATES OF AMERICA	
Investment Nature:Joint Venture	
Strat. Partnrg.	
Tech. Licensing	
Investment Sector:COMMERCIAL SERVICE	
Event Cooperants :	
DRIE, provinces, associations	
Estimated Budget : \$6,000.00	

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: ATLANTA

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

Seq #

Date

Type: OTHER PROMOTION

- | | | |
|---|--|-------|
| 8 | Event Description:
Int'l. Woodworking Mach. & Supply Fair - info booth
City :Atlanta
Country :UNITED STATES OF AMERICA
Investment Nature:Joint Venture
Strat. Partnrg.
Tech. Licensing
Investment Sector:MACHINERY/EQUIPMENT
Event Cooperants :
DRIE, provinces, associations
Estimated Budget : \$6,000.00 | 08/90 |
| 6 | Event Description:
ICAAC (biotech show) - info booth
City :Atlanta
Country :UNITED STATES OF AMERICA
Investment Nature:Joint Venture
Strat. Partnrg.
Tech. Licensing
Investment Sector:STRATEGIC TECHNOLOGIES
Event Cooperants :
DRIE, provinces, associations
Estimated Budget : \$6,000.00 | 10/90 |
| 3 | Event Description:
Bobbin Show
City :Atlanta
Country :UNITED STATES OF AMERICA
Investment Nature:Joint Venture
Strat. Partnrg.
Tech licensing
Investment Sector:MACHINERY/EQUIPMENT
Event Cooperants :
DRIE, provinces, associations
Estimated Budget : \$6,000.00 | 09/90 |

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: ATLANTA

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

Seq #	Date
Type: OTHER PROMOTION	
9	05/90
Event Description:	
Waste Expo 90 - info booth	
City	:Atlanta
Country	:UNITED STATES OF AMERICA
Investment Nature:	Joint Venture
	Strat. Partnrg.
	Tech. Licensing
Investment Sector:	COMMERCIAL SERVICE
Event Cooperants :	
	DRIE, provinces, associations
Estimated Budget :	\$6,000.00
1	04/90
Event Description:	
TABES 90 INFO BOOTH	
City	:HUNTSVILLE, AL.
Country	:UNITED STATES OF AMERICA
Investment Nature:	JOINT VENTURE
	STRAT. PARTNRG
	TECH. LICENSING
Investment Sector:	AREOSPACE/DEFENCE
Event Cooperants :	
	DRIE, PROVINCES, ASSOCIATIONS
Estimated Budget :	\$6,000.00
4	01/90
Event Description:	
Southeast Poultry & Egg Association Show	
City	:Atlanta
Country	:UNITED STATES OF AMERICA
Investment Nature:	Joint Venture
	Strat. Partnrg.
	Tech Licensing
Investment Sector:	AGRICULTURE/FOOD/FISH
Event Cooperants :	
	DRIE, provinces, associations
Estimated Budget :	\$15,000.00

Total estimated budget for all proposals: \$72,000.00

DEPARTMENT OF EXTERNAL AFFAIRS

PEMD - Proposed Government Promotional Activities 1990/91

Proposals As Of December 23/89

Post: Atlanta

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Contact</u>
90/04/00	COMDEX Spring Computer Show Atlanta Fair , National Stand	Advanced Tech., Products & Services
90/04/00	SUPERCOMM 90 Atlanta Fair, National Stand	Advanced Tech Products & Services
90/08/00	SBCA/STTI - Satellite V Nashville Fair, National Stand	Advanced Tech Products & Services
90/09/00	Florida Lumber & Building Materials, Orlando Fair National Stand	Forest Products
90/11/00	NSPI Orlando, Florida Fair National Stand	Consumer Products
991/03/00	National Rural Builder's Ass'n Nashville Info Booth	Construction Industry

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: BOSTON

Country: UNITED STATES OF AMERICA

Two-way trade between Canada and the five New England states in this territory (Massachusetts, New Hampshire, Rhode Island, Maine and Vermont) reached \$11 billion in 1988. Canadian exports declined by 3% to \$6.8 billion and imports from New England increased 15% to reach \$4.2 billion. Our major exports were forestry products (\$1.6B), fish (\$1B), petroleum & natural gas (\$850M), advanced technology products (\$630M), & transportation equipment (\$475M). Our major imports were computers (\$750M), semi-conductors (\$630M) & telecommunication equipment (\$150M).

The New England economic miracle is over. Two major factors contribute to slower economic growth: the downturn in the mini-computer industry & reduced defense spending. The unemployment rate in New England is beginning to converge toward the national average. Over the last 12 months, the largest state, Massachusetts has seen the unemployment rate grow from 3.5% to 4.4% in Sept 89, a significant increase though lower than the 5.2% national average. The manufacturing sector has lost 20,000 jobs, the electronic equipment manufacturing industry alone shedding 10,000 jobs. Competition from more powerful PC's, mostly produced in California, is hurting the mini-computer industry in N.E. The non-manufacturing sector has created 77,000 jobs over the last 12 months. Reduction in defense spending, with Massachusetts having the fourth highest defense prime contract awards per capita, is also affecting the regional economy. However, continued commitment by Washington to new defense electronics may bolster companies in N.E. Speculative building has left a supply of over-priced houses, particularly condominiums, and there are clear signs of excess supply of commercial property. Despite increasing unemployment rates, the N.E. region still has the highest per capita income in the United States at U.S. \$20,191 in 1988, a yearly increase of 8.4% and the highest in the nation. However, these higher incomes do not result in significantly higher consumer spending due to the uncertain economic outlook nationally.

Major infrastructure projects are underway in the Boston area, the major ones being the \$7.3 billion Boston Harbor Cleanup project and the \$600 million Interstate 93 interconnection project. The \$4 billion Central Artery Depression/Third Harbor Tunnel to Logan airport is scheduled to start within a year. These projects will create many opportunities for Canadian exporters of construction products and services, not only in Boston, but in other cities like Portland, Maine and Manchester, New Hampshire, where local American contractors should be busy working on Boston infrastructure projects. With 200,000 employees, the electronics industry continues to offer major export opportunities for Canada. Hardware manufacturers are turning more and more to outside software suppliers when developing new products and new applications. The defense industry remains a major sector with Electronics System Division at Hanscom Air Force Base spending \$4 billion a year on major projects. General Electric in Massachusetts recently received a multi-billion contract for fighter jet engines.

Canada remains the largest fish supplier with exports of \$1 billion in 1988. But fish consumption growth is slowing down and 1989 per capita consumption is forecast to remain around 15 pounds. Resistance to higher prices relative to other proteins and worries about fish quality resulting from beach pollution incidents partially explain stagnant fish consumption

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: BOSTON

Country: UNITED STATES OF AMERICA

from beach pollution incidents partially explain stagnant fish consumption. The major concern for our exporters is the reduction in Canadian fishing quotas and possible further reductions in 1990. Major U.S. fish buyers are worried that Canadian products may not come to the market & are assessing alternate sources of supplies with much emphasis on Alaskan fisheries. If Canada loses market share due to quota reductions, it could take many years to regain our market share. Fish prices are, however, firming up and this trend is forecast to continue in 1990.

With the highest per capita income in the nation, New England offers excellent opportunities for Canadian consumer goods. A large number of Canadian consumer product manufacturers are participating in NEBS programs that should double to 16 seminars in 89/90, & these companies could start exporting consumer products during 90/91.

New England continues to face a severe energy shortage. This has led major firms to consider cogeneration and examine carefully expansion plans. Canada is the major foreign supplier of energy to the region. Oil imports for Come-by-Chance and Irving are valued at \$760 million. Western of the market and will supply the Ocean State gas fired station project now under construction. The Iroquois pipeline project is proceeding well (capacity 400 million MCFPD, in service 1991) but the Champlain project is now on hold. Hydro Quebec and New Brunswick Power supply 5% of the electricity market (\$448 M) which will double with the Hydro Quebec II Project in 1990. Nova Scotia Power's Project Bluenose (in service 1996) is now on at the stage of selecting a joint partner.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 EXPORT PROMOTION PRIORITIES

Mission: BOSTON

Country: UNITED STATES OF AMERICA

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

1. CONSTRUCTION INDUSTRY
 - Major construction of Boston Harbor tunnel & Harbor Cleanup, over (US\$) 13 Billion to be spent.
 - Canadian construction products have an excellent reputation.
 - A strong demand continues for pre-built homes.
2. ADVANCED TECH. PROD. & SERV
 - Advanced Technology Products market is large & maturing. Leaders in the field, such as DEC, Prime, Wang, Data General, & Apollo are located near Boston.
 - Software estimates growth of 25% in 1990 led by firms such as Lotus, Bitstream.
3. DEFENCE PROGRAMS, PRODUCTS, SERV
 - New England firms play a major role in the manufacturing of Defence Electronic, Aerospace and Marine products.
 - New England Hi-Tech firms continue to benefit from equipment upgrades despite declining defence budget
 - USAF Electronic Systems Division has U.S. \$4B R&D budget.
4. FISHERIES, SEA PRODUCTS & SERV.
 - Seafood consumption growth has stabilized at 15 pounds per capita.
 - Opportunities exist for underutilized species & farmed fish.
 - Competition from USA (Alaska, particularly) & other countries is very strong.
 - Potential is great for processed and specialty seafoods.
5. CONSUMER PRODUCTS & SERVICES
 - Territory has one of the highest per capita incomes in the U.S. (US \$20,191) -Disposable income continues to grow faster than national average. -U.S. buyer interest in CDN consumer goods increasing because of FTA interest. -Many NEBS participants come from consumer product sectors and are now starting to export, requiring assistance.
6. EDUCATION, MEDICAL, HEALTH PROD
 - Biotech industry in region is world class, second only to California in the number of dedicated companies in the U.S.
 - Biomedical industries in the region are key to the region's competitive strength in int'l markets. -Region leads in the U.S. biomedical R&D base with 9 medical schools & 46 major teaching hospitals.

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

- | | |
|-------------------------------------|--------------------------------------|
| 1. FOREST PRODUCTS, EQUIP, SERVICES | 4. TRANSPORT SYS, EQUIP, COMP, SERV. |
| 2. ADVANCED TECH. PROD. & SERV | 5. OIL & GAS EQUIPMENT, SERVICES |
| 3. FISHERIES, SEA PRODUCTS & SERV. | 6. POWER & ENERGY EQUIP. & SERV. |

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BOSTON

Market: UNITED STATES OF AMERICA

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	7100.00 \$M	7200.00 \$M	7300.00 \$M	7500.00 \$M
Canadian Exports	106.70 \$M	110.00 \$M	113.00 \$M	120.00 \$M
Canadian Share of Market	1.50 %	1.50 %	1.50 %	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	95.00 %
OTHER COUNTRIES	3.40 %

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

Products/services for which there are good market prospects:

1. Natural foods-No additives
2. Beverages
3. Foods for Micro-wave

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
- Bilateral economic trade agreement

14/12/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BOSTON

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- _____
- _____

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

Activity: Boston Solo Food Show

Expected Results: Introduce 20+ new Canadian companies to U.S. market

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BOSTON

Market: UNITED STATES OF AMERICA

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	1960.00 \$M	2000.00 \$M	2050.00 \$M	2100.00 \$M
Canadian Exports	195.00 \$M	200.00 \$M	204.00 \$M	205.00 \$M
Canadian Share of Market	10.00 %	10.00 %	10.00 %	10.00 %

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 %
MEXICO	13.00 %
ECUADOR	12.00 %
TAIWAN	5.00 %
PEOPLE'S REP OF CHINA	4.00 %
OTHER COUNTRIES	16.00 %

Current Status of Canadian

exports in this sector/subsector: Mature with little growth

Products/services for which there are good market prospects:

1. NOTE!!! THIS IS FOR SHELLFISH ONLY (NOT FIN FISH)!
2. Shrimp
3. Crab
4. Lobster
5. Mussels
6. Clams

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Strong sectoral capability in Canada
- Bilateral economic trade agreement

14/12/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BOSTON

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BOSTON

Market: UNITED STATES OF AMERICA

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	2020.00 \$M	1800.00 \$M	1850.00 \$M	1900.00 \$M
Canadian Exports	1005.00 \$M	900.00 \$M	960.00 \$M	970.00 \$M
Canadian Share of Market	50.00 %	50.00 %	50.00 %	51.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	22.00 %
NORWAY	7.00 %
ICELAND	6.00 %
DENMARK	4.00 %
ARGENTINA	1.00 %
OTHER COUNTRIES	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. NOTE!!! THIS IS FOR FIN FISH ONLY (NOT SHELLFISH)!
2. Farmed Salmon
3. Cod
4. Turbot
5. Redfish
6. Silver Hake
7. Mackerel
8. Flatfish

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
- Bilateral economic trade agreement
- Willingness of exporters to invest/joint venture in territory

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BOSTON

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
 - Unsuitable product
 - Lack of Resource
 -
-

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

Activity: Trade Workshop on New Species
Expected Results: Introduce new products

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

Activity: Trade Workshop on Aquaculture Products
Expected Results: Open market for new producers

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BOSTON

Market: UNITED STATES OF AMERICA

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: AEROSPACE & MARINE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	2800.00 \$M	3600.00 \$M	4200.00 \$M	4500.00 \$M
Canadian Exports	151.00 \$M	198.00 \$M	205.00 \$M	223.00 \$M
Canadian Share of Market	0.05 %	0.06 %	0.05 %	0.04 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	93.00 %
UNITED KINGDOM	3.00 %
GERMANY WEST	2.00 %
FRANCE	1.00 %
ISRAEL	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. Aircraft Engines & Parts
2. Aircraft Parts, Except Engines
3. Engines & Turbines
4. Ships, Boats & Parts
5. Aircraft, Complete with Engines

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
- Bilateral economic trade agreement
- Willingness of exporters to invest/joint venture in territory

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BOSTON

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- _____
- _____

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

Activity: Follow up to Atlantic Canada Defense Mission
Expected Results: Introduce 5 new firms to market

Activity: Continue with Quarterly Defence Report to Cdn Industries
Expected Results: Inform Cdn Industries of Defence Opportunities in N.E.

Activity: Follow up to Raytheon's Classified Briefing to Canadian Industries
Expected Results: The placement of \$500M in orders with Cdn Industry

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

Activity: Plan Western Canada Defence Mission to Boston
Expected Results: Introduce 4 new firms to market

Activity: Subcontractors Conference III. Recruit 6 new firms
Expected Results: Introduce 3 new firms to Canadian manufacturers

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BOSTON

Market: UNITED STATES OF AMERICA

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: ELECTRICAL & ELECTRONIC

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	7600.00 \$M	9130.00 \$M	9000.00 \$M	8700.00 \$M
Canadian Exports	98.90 \$M	140.00 \$M	137.00 \$M	135.00 \$M
Canadian Share of Market	0.01 %	0.01 %	0.02 %	0.02 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	94.00 %
JAPAN	2.00 %
FRANCE	2.00 %
UNITED KINGDOM	1.00 %
GERMANY WEST	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. Semi conductors
2. Integrated Circuits
3. Radios
4. Power supplies
5. Printed Circuit Boards
6. Flex Circuits

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Trade Fair activity
- Canada is one of few sources of supply
- Bilateral economic trade agreement
- Competitive Canadian financing
- Willingness of exporters to invest/joint venture in territory

14/12/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BOSTON

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- 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: Promote Canadian role in ADI at Local U.S. Air Base
Expected Results: Establish access for Canadian manufacturers

Activity: Company prospecting in Western Canada
Expected Results: Locate 5-10 new 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: Establish new Commercial markets for Canadian manufacturers
Expected Results: Open new doors for Cdn electrical/electronic manufacturers.

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BOSTON

Market: UNITED STATES OF AMERICA

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

Air Defence Initiative

Approximate Value: 2500 M\$

Financing Source : OTHER

Contact : W.J. Sanford

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BOSTON

Market: UNITED STATES OF AMERICA

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	32900.00 \$M	34545.00 \$M	36270.00 \$M	38100.00 \$M
Canadian Exports	244.00 \$M	367.00 \$M	385.00 \$M	404.00 \$M
Canadian Share of Market	0.00 %	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	75.00 %
JAPAN	11.00 %
GERMANY WEST	5.00 %
UNITED KINGDOM	2.00 %
FRANCE	2.00 %
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. NOTE!!! (THIS IS FOR HARDWARE ONLY) NOT SOFTWARE!!
2. Lap Top Portables
3. Communications
4. Expansion Boards

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Fairs and Missions support
- Bilateral economic trade agreement

Factors for Canadian exports not reaching market potential:

- _____
- _____

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BOSTON

Market: UNITED STATES OF AMERICA

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

Activity: Continue to develop relationship with DEC, Wang & Apollo
Expected Results: Increased knowledge of Canadian capabilities

Activity: Work with Massachusetts Office of International Trade to
identify joint venture partners
Expected Results: 1 joint venture

Activity: Commission study of market for hardware
Expected Results: Identify niche markets for boards and peripherals

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BOSTON

Market: UNITED STATES OF AMERICA

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	6465.00 \$M	7500.00 \$M	8700.00 \$M	10179.00 \$M
Canadian Exports	49.00 \$M	74.00 \$M	84.00 \$M	98.00 \$M
Canadian Share of Market	0.00 %	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	85.00 %
JAPAN	3.00 %
GERMANY WEST	3.00 %
UNITED KINGDOM	2.00 %
OTHER COUNTRIES	6.00 %

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

Products/services for which there are good market prospects:

1. NOTE!!! THIS IS FOR SOFTWARE ONLY (NOT HARDWARE)!!
2. Expert systems
3. Development tools
4. Communications
5. Medical Software

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
- Bilateral economic trade agreement
- Willingness of exporters to invest/joint venture in territory

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BOSTON

Market: UNITED STATES OF AMERICA

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
- _____
- _____

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

Activity: Participation in N.E. Computer Show '90
Expected Results: Distribution agreements and increased exposure for Cdn Coys

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 education seminars
Expected Results: Identify distribution network

Activity: Investment Development Seminars
Expected Results: Identify joint venture partners

Activity: Work with Boston Computer Society to have Cdn coys demo products
Expected Results: Demos by 4 Cdn companies

Activity: Work with Massachusetts Office of International Trade to identify joint venture opportunities
Expected Results: 2 joint venture agreements

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BOSTON

Market: UNITED STATES OF AMERICA

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	11340.00 \$M	11510.00 \$M	11629.00 \$M	11700.00 \$M
Canadian Exports	226.80 \$M	230.20 \$M	232.50 \$M	234.00 \$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: 100+ \$M

Major Competing Countries Market Share

UNITED STATES OF AMERICA	60.00 %
PEOPLE'S REP OF CHINA	10.00 %
TAIWAN	6.00 %
KOREA	5.00 %
HONG KONG	5.00 %
OTHER COUNTRIES	12.00 %

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

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Bilateral economic trade agreement

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Unsuitable product
- Limited Canadian capabilities
- Lack of preparation for exporting
- Products not styled for N.E. market

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BOSTON

Market: UNITED STATES OF AMERICA

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

Activity: Follow up on 1989 Cdn Festival of Fashion
Expected Results: Four new buying connections

Activity: Follow up on 1989 Montreal Pret
Expected Results: Four new buying connections

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BOSTON

Market: UNITED STATES OF AMERICA

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: JEWELERY & GIFTWARE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	915.00 \$M	974.00 \$M	1000.00 \$M	1020.00 \$M
Canadian Exports	18.30 \$M	19.40 \$M	20.00 \$M	20.40 \$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 STATES OF AMERICA	50.00 %
SOUTH AFRICA	20.00 %
WEST EUROPE	10.00 %
INDIA	4.00 %
SOUTH AMERICA	4.00 %
OTHER COUNTRIES	10.00 %

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

Products/services for which there are good market prospects:

1. Crafts

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
- Extremely competitive local industry
- Much lower pricing/other country

14/12/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BOSTON

Market: UNITED STATES OF AMERICA

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

Activity: Follow up 1989 NEBS companies
Expected Results: 20 Cdn companies begin exporting

Activity: Cdn crafts mission to Post FY 89-90
Expected Results: Expose 15 coys to the New England market

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BOSTON

Market: UNITED STATES OF AMERICA

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: FURNITURE & APPLIANCES

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	2880.00 \$M	3110.00 \$M	3200.00 \$M	3000.00 \$M
Canadian Exports	144.00 \$M	155.50 \$M	160.00 \$M	150.00 \$M
Canadian Share of Market	5.00 %	5.00 %	5.00 %	5.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	80.00 %
WEST EUROPE	5.00 %
TAIWAN	2.00 %
JAPAN	2.00 %
KOREA	2.00 %
OTHER COUNTRIES	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. Contract

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Trade Fair activity
- Competitive pricing
- Bilateral economic trade agreement

Factors for Canadian exports not reaching market potential:

- _____
- _____

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BOSTON

Market: UNITED STATES OF AMERICA

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

Activity: Follow up U.S. buyers to IDEX 1989
Expected Results: \$3M sales volume

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BOSTON

Market: UNITED STATES OF AMERICA

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	1000.00 \$M	1108.00 \$M	1242.00 \$M	1392.00 \$M
Canadian Exports	0.06 \$M	0.13 \$M	0.31 \$M	0.45 \$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
UNITED STATES OF AMERICA	67.00 %
JAPAN	8.00 %
SWITZERLAND	7.00 %
GERMANY WEST	7.00 %
SWEDEN	6.00 %
UNITED KINGDOM	5.00 %

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

Products/services for which there are good market prospects:

1. Human therapeutics
2. Diagnostics
3. Chemicals
4. Plant culture
5. Bioprocessing

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Provincial export promotion
- Bilateral economic trade agreement

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BOSTON

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- Limited Canadian capabilities
- 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: Meet with N.E. biotech coys interested in joint ventures
Expected Results: Assist in supporting 2 joint ventures

Activity: Develop working relationship with Massachusetts biotech council and Massachusetts Centre of Excellence
Expected Results: Increase joint venture opportunities for Canadian companies

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BOSTON

Market: UNITED STATES OF AMERICA

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	2160.00 \$M	2325.00 \$M	2500.00 \$M	2787.00 \$M
Canadian Exports	10.00 \$M	6.60 \$M	6.60 \$M	6.60 \$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
UNITED STATES OF AMERICA	92.00 %
GERMANY WEST	2.50 %
JAPAN	2.50 %
UNITED KINGDOM	2.00 %
FRANCE	0.50 %
SWEDEN	0.50 %

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

Products/services for which there are good market prospects:

1. AIDS prevention Products
2. All disposable Products
3. Surgical instruments
4. Laboratory equipment
5. Laboratory instruments
6. Rehabilitation equipment

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Provincial export promotion
- Bilateral economic trade agreement

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BOSTON

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

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

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

Activity: Outgoing mission of Canadian coys to New England Healthcare Assemblies
Expected Results: Increase visibility of Cdn coys in 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: Contract for study on regional healthcare market - terms of reference established by Post
Expected Results: Define market segments for penetration by Cdn coys

Activity: Incoming mission of U.S. experts to Canada organized by Post
Expected Results: Develop market strategy for Canadian companies

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BOSTON

Market: UNITED STATES OF AMERICA

Sector : CONSTRUCTION INDUSTRY

Sub-Sector: BUILDING PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	7420.00 \$M	7765.00 \$M	8100.00 \$M	8800.00 \$M
Canadian Exports	141.90 \$M	155.00 \$M	162.00 \$M	195.00 \$M
Canadian Share of Market	1.90 %	2.00 %	2.00 %	2.20 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	96.00 %
JAPAN	1.30 %
SWEDEN	0.50 %

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

Products/services for which there are good market prospects:

1. Pre-built homes
2. Windows & doors
3. Cabinetry

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
- Bilateral economic trade agreement

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BOSTON

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

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

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

- Activity: Build Boston Trade Show
Expected Results: Introduce 2-3 new Canadian companies to market
- Activity: America East Trade Show
Expected Results: Introduce 2-3 new Canadian companies to U.S. buyers
- Activity: NorthEast Construction Show (Big Show)
Expected Results: Introduce 14-15 new Canadian companies to U.S. buyers

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

- Activity: Commission survey of New England pre-built housing market
Expected Results: Increase knowledge of market size & increase Cdn exports
- Activity: Establish info booth at America East Trade Show
Expected Results: Increase Cdn visibility at Show. Promote F.T.A.
- Activity: Outgoing mission to Boston infrastructure projects
Expected Results: Introduce 10 Canadian firms to market

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BOSTON

Market: UNITED STATES OF AMERICA

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

Major construction of Boston Central Artery	Approximate Value: 3700 M\$ Financing Source : DOM - Domestically funded Contact : M. Robichaud
Third Harbor Tunnel - Boston to Logan Airport	Approximate Value: 2000 M\$ Financing Source : DOM - Domestically funded Contact : M. Robichaud
Boston Harbor Cleanup	Approximate Value: 7500 M\$ Financing Source : DOM - Domestically funded Contact : M. Robichaud

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: BOSTON

Country: UNITED STATES OF AMERICA

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
Two years ago	10000.00	20.00	10.00
One year ago	9000.00	20.00	10.00
Current year	9000.00	15.00	40.00

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:

\$1.5 Billion, mostly portfolio investment

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

- SouthEastern U.S. States
- U.K. including Scotland
- Ireland
- Netherlands

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

- -Publicity in major newspapers-Massachusetts Hi-Tech, Regional edition Wall St. Journal, Boston Globe
- Investment promotion missions

IDP Partners and related program activities:

Massachusetts Office of International Trade

- Assist in identifying companies for software strategic alliances.

Boston Computer Society

- Coordinated presentation by Canadian Software Companies

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: BOSTON

Country: UNITED STATES OF AMERICA

IDP Partners and related activities cont d:

Massachusetts Bio-tech Council

- Co-sponsor of Bio-tech IDP Seminar

Provincial reps in Boston - Quebec, Ontario, New Brunswick

- Assist in servicing specific inquiries

Compared to major competitive destinations, Canada is perceived to have

the following advantages:

- Easy transfer of executives under FTA
- Financial incentives
- Abundant energy and lower costs

the following constraints:

- Limited R&D base
- Less deregulation than in U.S.A.

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	HIGH
Strategic Partnering	HIGH
Technology Licensing	HIGH

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: BOSTON

Country: UNITED STATES OF AMERICA

The mission believes that the following sectors are of greatest interest to investors in its territory/country an assigned ranking A = High B = Medium C = Low

Sector	Ranking
Agriculture/Food/Fish	C
Resource Processing	C
Machinery and Equipment	C
Transportation	C
Consumer Products	C
Commercial Service	B
Computer and Communications	A
Health Care Products/Medical	A
Aerospace and Defence	B
Strategic Technologies	A

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: BOSTON

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

Seq #	Date
Type: COMMUNICATIONS EXHIBIT	
1	10/90
Event Description: Info booth at 1990 Northeast Computer Fair to promote IDP	
City : Boston	
Country : UNITED STATES OF AMERICA	
Investment Nature: Joint Venture Str. Partnering	
Investment Sector: COMPUTER/COMMUNICATIONS	
Event Cooperants : None	
Estimated Budget : \$5,000.00	
2	03/91
Event Description: Info booth at New England Health Care Assembly Show.	
City : Boston	
Country : UNITED STATES OF AMERICA	
Investment Nature: Str. Partnering	
Investment Sector: HEALTH CARE PRODUCTS/MEDICAL	
Event Cooperants : None	
Estimated Budget : \$5,000.00	
Total estimated budget for all proposals: \$10,000.00	

DEPARTMENT OF EXTERNAL AFFAIRS

PEMD - Proposed Government Promotional Activities 1990/91

Proposals As Of December 23/89

Post: Boston

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Contact</u>
90/05/09	ELECTRO 90, Electronics Show Boston Fair , National Stand	Advanced Tech., Products & Services
90/03/00	North East Construction Show Boston Fair, National Stand	Construction Industry & Services
91/03/00	Boston Seafood Show Boston Fair, National Stand	Fisheries, Sea Products & Services

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: BUFFALO

Country: UNITED STATES OF AMERICA

The Upstate region of New York has approximately 18,000 small to medium size companies consisting of service and manufacturing companies whereas there are only five Fortune 500 companies in the area: Eastman Kodak, Agway, Corning Inc., Armtek, and Bausch & Lomb. The majority of the companies are located in the major metropolitan centres of the territory including the Niagara Frontier, Rochester, Syracuse, Binghamton, and the Mohawk Valley, while others are located in smaller centres including Olean, Elmira, Watertown, and Ogdensburg. The population of the area is in excess of 4 million with excellent proximity to Canada and a business community that is geared to working with Canadian companies. The New Exporters to Border States Program (NEBS) has educated over 1400 company representatives during the past five years. The most recent survey indicates that there is a better than 50% success ratio for new exporters entering the Upstate New York territory under this program.

The economy of the consular area has shifted from a "Blue Collar" type area to a service area over the past decade. Buffalo, for example, is undergoing an exciting renaissance and becoming an attractive new market in areas such as transportation, finance, and high-tech industries. Rochester, which boasts many large corporations such as Eastman Kodak, Xerox, Bausch & Lomb, and Harris Corp., also maintains a solid core of more than 1000 smaller companies in areas such as printing, food products, and telecommunications. Syracuse has such major firms as General Electric, Carrier Corporation, Bristol Myers, and P & C Food Markets.

The Upstate New York area is within one day's trucking access to the following market resources:

- *55 percent of all U.S. manufacturing activity,
- *50 percent of total U.S./Canadian population,
- *52 percent of total personal income in the U.S./Canada,
- *53 percent of U.S. wholesale sales.

Canadian exports to New York State in 1988 were \$15 billion dollars up about 8% from a year earlier. Shipments from New York State to Canada were 7.0 billion dollars in 1988 and have been stable in recent years. Canada's exports to New York State in 1988 represented 15% of all Canadian exports to the United States. Canadian manufacturers export products to Upstate New York in almost all sectors including the auto industry, newsprint, motor vehicle parts, telecommunications, apparel, and meat products. There are some 500 Canadian companies that use Upstate New York as major distribution points for the entire United States market.

The Solo Food Show which has been successfully held in buffalo for the past 13 years, will be held in Syracuse next November for the first time under the Sysco Food Show. Sysco is the largest food service/distributor in the United States. Though the Buffalo area is a particularly viable market for Canadian food products (the Solo Food Show generates approximately \$2 million in revenue alone), we felt that a change in location to Central New York State would give Canadian products greater coverage.

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: BUFFALO

Country: UNITED STATES OF AMERICA

That area does not normally receive the same attention the Buffalo market does. Also, we will be hosting the Second Annual "Taste of Canada Exposition" held at the Premier Center, a wine and gourmet shop in Buffalo. This exposition promoted a total of 28 Canadian products, 14 of which were new.

In addition to the above shows mentioned, we will continue to participate in the New York State Restaurant Show, the Rochester Computer and Business Show, and the Empire Farms Days Show held in Seneca Falls, New York. As in past years, we will emphasize trade development, investment, corporate and government liaisons, particularly with U.S. Customs Service and the F.D.A. offices. Trade promotional programmes will include sending buyers to the Toronto Boat Show, Montreal Furniture Show, Canadian Festival of Fashion, IIDEX, and assisting Canadian companies in the Buffalo International Aviation Snow Symposium. Due to the success of the Ontario and Quebec NEBS missions, we will continue to work closely with those offices involved. There is a total of 11 NEBS missions planned for 1991 which includes two P.R.O.F.I.T. missions. The number of participants per mission has increased from 20-25 to approximately 35 members.

The Free Trade Agreement is the most important economic event to impact the area in the past 30 years. Because of the already substantial amount of trade and business between Canada and New York State, it is our goal to focus our program to increase economic benefits to Canada.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 EXPORT PROMOTION PRIORITIES

Mission: BUFFALO

Country: UNITED STATES OF AMERICA

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
Familiar with products and Canadian production facilities.
2. EDUCATION, MEDICAL, HEALTH PROD
Products are price competitive.
3. CONSUMER PRODUCTS & SERVICES
Growing markets.
Similar quality standards and/or fashions.
4. CONSTRUCTION INDUSTRY
Products are price competitive.
Favorable rate of exchange.

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

- | | |
|--------------------------------------|----------------------------------|
| 1. TRANSPORT SYS, EQUIP, COMP, SERV. | 4. POWER & ENERGY EQUIP. & SERV. |
| 2. FOREST PRODUCTS, EQUIP, SERVICES | 5. OIL & GAS EQUIPMENT, SERVICES |
| 3. MINE, METAL, MINERAL PROD & SRV | |

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BUFFALO

Market: UNITED STATES OF AMERICA

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	10200.00 \$M	10500.00 \$M	10700.00 \$M	10900.00 \$M
Canadian Exports	572.00 \$M	630.00 \$M	650.00 \$M	763.00 \$M
Canadian Share of Market	5.60 %	8.00 %	6.00 %	7.00 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	80.00 %
UNITED KINGDOM	3.00 %
FRANCE	2.00 %
GERMANY WEST	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. Meat
2. Fresh Produce
3. Beer/Wine
4. Fish

Factors contributing to current successful Canadian exports:

- Import duties are moderate
- Aggressive marketing
- Fairs and Missions support
- Trade Fair activity
- Provincial export promotion
- Competitive pricing
- Strong sectoral capability in Canada
- Competitive Canadian financing
- Willingness of exporters to invest/joint venture in territory
- Proximity to the border.
- products.
- Familiarity with Canadian

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BUFFALO

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
 - Restrictive quotas
 - Restrictive standards
 - Non-competitive pricing
 - Lack of promotion and advertising
 - Limited appreciation/understanding of distribution system
 - Limited Canadian capabilities
 - Market prospects have not been adequately explored
 - FDS, USDA FISH &
 - WILDLIFE AGENCY
-
-

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

Activity: In-store Food Promotions (Wegmans)
Expected Results: Increased exposure for Cdn products; intro of new products.

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

Activity: In-store Food Promotions (Tops, Bells)
Expected Results: \$1 million in sales.

Activity: Solo Food Show
Expected Results: \$2 million in sales, 50 participants.

Activity: New York State Restaurant Show.
Expected Results: Increased exposure for Canadian products.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BUFFALO

Market: UNITED STATES OF AMERICA

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

Food Market Study

Approximate Value: 12000 M\$

Financing Source : NFR - No external fnding req'd

Contact : Carl A. Rockburne

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BUFFALO

Market: UNITED STATES OF AMERICA

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	7000.00 \$M	7400.00 \$M	7600.00 \$M	8000.00 \$M
Canadian Exports	91.00 \$M	125.00 \$M	152.00 \$M	208.00 \$M
Canadian Share of Market	1.30 %	1.70 %	2.00 %	2.60 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	45.00 %
HONG KONG	15.00 %
PACIFIC RIM COUNTRIES	15.00 %
KOREA	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. Outerwear
2. Sweaters
3. Dresses/Skirts
4. Foundation Garments

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- Trade Fair activity
- Provincial export promotion
- Strong sectoral capability in Canada

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BUFFALO

Market: UNITED STATES OF AMERICA

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
- 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: N/A

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

Activity: Any major apparel trade show is held in N.Y. City. Buyers' Mission to Toronto/MTL for Upstate reps has been minimal.

Expected Results: Increase penetration in Upstate New York.

30/11/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BUFFALO

Market: UNITED STATES OF AMERICA

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

N/A

Approximate Value: 0 M\$

Financing Source :

Contact :

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BUFFALO

Market: UNITED STATES OF AMERICA

Sector : MULTIPLE SECTORS

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	415.00 \$M	430.00 \$M	445.00 \$M	460.00 \$M
Canadian Exports	10.00 \$M	12.00 \$M	14.00 \$M	16.00 \$M
Canadian Share of Market	2.50 %	2.80 %	3.20 %	3.60 %

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

Major Competing Countries	Market Share
JAPAN	5.00 %
KOREA	4.00 %
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. Computer Software
2. Computer Services
3. Computer Peripherals

Factors contributing to current successful Canadian exports:

- Import duties are low
- Aggressive marketing
- PEMD support
- Provincial export promotion
- Competitive pricing
- Strong sectoral capability in Canada

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BUFFALO

Market: UNITED STATES OF AMERICA

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
- Copyright law (i.e.
- 30% compatibility)
- _____
- _____

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

Activity: Update of Manufacturers' reps for computer software, peripherals, and services.
Expected Results: Great assistance to Canadian companies.

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

Activity: Rochester Computer and Business Show
Expected Results: Increase number of participants; increase mkt penetration.

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

Activity: Study of Computer distribution in territory.
Expected Results: Increase market penetration.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BUFFALO

Market: UNITED STATES OF AMERICA

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

A Market Analysis of Computer Industries in N.Y. State	Approximate Value: 0 M\$
	Financing Source : NFR - No external fnding req'd
	Contact : Carl A. Rockburne

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: BUFFALO

Country: UNITED STATES OF AMERICA

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
Two years ago	80.00	25.00	65.00
One year ago	90.00	30.00	65.00
Current year	100.00	30.00	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:

35 million.

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

- Other U.S.A.
- Mexico
- Ireland
- Spain
- Japan Asisa/Pacific Rim
- Korea

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

- Land Incentives (Ireland)
- Labour Incentives (Mexico/Ireland)
- Financial Incentives (Portugal, Mexico)
- Proximity to major market (EEC)

IDP Partners and related program activities:

- Niagara Region Development Corporation
- Seminar in territory.

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: BUFFALO

Country: UNITED STATES OF AMERICA

IDP Partners and related activities cont d:

Province of Ontario

- Investment Counselling.

Upstate Chambers of Commerce

- Speakers Forums.

Accounting/Legal Firms

- Seminar in territory/leads.

Upstate World Trade Associations

- Leads; Speakers Forums.

Can-Am Business Council

- Leads.

Canadian banks - Royal Bank of Canada

- Leads.

Investment Canada

- Leads.

Regional Development Officers

- Leads.

U.S. Department of Commerce

- Leads.

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

- Access to U.S. market.
- Stable/skilled labour force.
- Proximity to Canadian consumers.
- Access to competitive power.
- Economic stability; FTA.

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: BUFFALO

Country: UNITED STATES OF AMERICA

the following constraints:

- Cost of living.
- Toronto market.
- Labour shortages.
- Taxation.
- High rate of exchange Canadian/U.S. dollar.

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	MEDIUM
Joint Venture	HIGH
Strategic Partnering	HIGH
Technology Licensing	LOW

The mission believes that the following sectors are of greatest interest to investors in its territory/country an assigned ranking A = High B = Medium C = Low

Sector	Ranking
Agriculture/Food/Fish	A
Resource Processing	C
Machinery and Equipment	B
Transportation	B
Consumer Products	A
Commercial Service	B
Computer and Communications	A
Health Care Products/Medical	B
Aerospace and Defence	C
Strategic Technologies	C

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: BUFFALO

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

Seq #	Date
Type: COUNSELLOR TOUR	
3	09/91
Event Description:	
BLITZ OF SELECTED COMPANIES	
City :Buffalo, Rochester,	
Country :UNITED STATES OF AMERICA	
Investment Nature:General	
Investment Sector:COMMERCIAL SERVICE	
Event Cooperants :	
Call on selected companies.	
N/A	
Estimated Budget : \$3,000.00	
Type: OTHER PROMOTION	
1	05/90
Event Description:	
SPEAKING ENGAGEMENT	
City :Rochester	
Country :UNITED STATES OF AMERICA	
Investment Nature:General	
Investment Sector:COMMERCIAL SERVICE	
Event Cooperants :	
Speaking engagement.	
Rochester Chamber of Commerce.	
Estimated Budget : \$500.00	
2	10/90
Event Description:	
SPEAKING ENGAGEMENT	
City :Rochester	
Country :UNITED STATES OF AMERICA	
Investment Nature:General	
Investment Sector:COMMERCIAL SERVICE	
Event Cooperants :	
Speaking engagement.	
Rochester Chamber of Commerce.	
Estimated Budget : \$500.00	
Total estimated budget for all proposals: \$4,000.00	

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: CHICAGO

Country: UNITED STATES OF AMERICA

The economy of this midwest region (Illinois, Wisconsin, Missouri and the 5 northwestern counties of Indiana) is relatively diverse. In absolute terms the manufacturing sector has been shrinking as a source of earnings. This is in line with the national shift from manufacturing to a more services-based economy. However, relative to the nation as a whole the midwest remains highly specialized in manufacturing. Manufacturing income as measured by labour income remains significantly above the national average. The traditional industries-steel, automotive, metal fabricating, heavy industrial equipment-are a critical driving force in the region's economy. Electronics, computer hardware and software, pharmaceuticals, robotics and other high tech industries with an emphasis on R&D have a major presence in the region. Over the last four years midwest manufacturers have carried out extensive capital improvements. The resultant benefits include more efficient plant operations and better cost control.

Agriculture plays a big part in the region's economy. The drought of 1988 didn't have the impact on crop production that was feared. The major crops of corn, soybeans, wheat sorghum and oats were all up from 1988 levels. The farm economy is seen to have rebounded in 1989. Capital expenditures by farmers are projected by the U.S. Dept. of Agriculture to be between \$10 to \$12 billion in 1989-90 (on a national basis). Tractors and other farm machinery will account for about 59% of all farm capital expenditures.

Economic performance for the region over 1989-90 is expected to be in line with the national average. Construction is up on 1988 levels with non-residential construction leading the way. Housing starts are slightly ahead of the level for the same period in 1988. Commercial real estate is soft. Unemployment at 5.4% is just above the national average of 5.2%. Increases in consumer prices are in line with the national rate of 5.5%. The slow down of business activity is relieving much of the pressure on manufacturing capacity and on the labour market.

The FTA is seen as providing benefits to midwest consumers and manufacturers alike. Small and medium sized manufacturers with annual sales from \$5 million to \$200 million have, with the implementation of the FTA in 1989, been more and more interested in pursuing trade and investment opportunities in Canada. Their proximity to Canada encourages companies considering their first venture into exporting or investment to look there. One inhibiting factor in this positive scenario. This centers on the uncertainties surrounding the move by the EC to a single market starting in 1993. Concerns over a possible "fortress Europe" have seen corporate planners and investors tend to put Canada on the "back burner". With the FTA a reality they feel they can afford to concentrate on their strategies for Europe.

Midwest exports to Canada in 1988 were significantly higher than in 1987. The decline in value of the US dollar contributed to this. Merchandise exports to Canada from Illinois, Wisconsin, Missouri totalled US\$9.2 billion in 1988 as opposed to US\$5.5 billion in 1987. Imports from Canada rose slightly to US\$7.4 billion but the net result was a merchandise trade

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: CHICAGO

Country: UNITED STATES OF AMERICA

deficit of \$1.8 billion for 1988. With the FTA in place, interest in exporting to Canada has increased and federal and state governments are promoting it vigourously.

The fear of a general recession in 1990 appears to be receding and forecasts now for the midwest are:

-Economy to expand at a 1.8% rate; unemployment rate to be at 5.7% by end 1990; inflation to remain stationary at about the 4.25% rate; long term interest rates to decline only slightly over the rest of 1989 before levelling off in 1990.

-Packages food and health care will likely see steady growth; aerospace, petroleum, soft goods, machinery and equipment and financial services will turn in excellent performances. Paper, chemicals, automotive can expect hard times.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 EXPORT PROMOTION PRIORITIES

Mission: CHICAGO

Country: UNITED STATES OF AMERICA

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

1. CONSUMER PRODUCTS & SERVICES

While Chicago post territory covers the 3rd largest consumer market in the U.S., its buying power at the wholesale level is unequalled because of the purchases by retailers for distribution across the country.

2. AGRI & FOOD PRODUCTS & SERVICE

Food products and beverages are virtually recession-proof and will grow slowly but steadily over the next 10 years. Products that append to the diet/fitness health conscious will be the strongest growth. Chicago is a major distribution/wholesale centre and has major retail market. Major national food shows are hosted here.

3. INDUSTRIAL MACHIN, PLANTS, SERV.

Steady growth in market and plants at 90% capacity have increased opportunities. Revitalization of plants have companies spending an all time high on equipment. Steady growth expected for next 10 years in machinery and major components. Environmental equipment prime market opportunities.

4. DEFENCE PROGRAMS, PRODUCTS, SERV

The defence market in the territory is approx. \$30 billion. Sales of Canadian defence products in 1988 totalled over \$200 million. The extension of the life cycle for current U.S. Army aircraft offers opportunities for firms providing spare parts and overhaul services.

5. TRANSPORT SYS, EQUIP, COMP, SERV.

Contracts in both St. Louis and Chicago for urban transit projects will provide important opportunities to Cdn. vehicle manufacturers. Chicago is a major center for pleasure craft. There is a vigorous and growing "aftermarket" for power and sailboats. Cdn. products are well regarded. Aerospace (civil) market opportunities expanding.

6. ADVANCED TECH. PROD. & SERV

Chicago is in top four of U.S. vis-a-vis electronics, software, research and development, robotics in particular and in high tech industries in general. Cdn. software, peripherals and data communication equipment can compete well. Expanding market for laptop computers.

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

- | | |
|--------------------------------------|-------------------------------------|
| 1. OIL & GAS EQUIPMENT, SERVICES | 4. CONSUMER PRODUCTS & SERVICES |
| 2. CHEM PROD & PETROCHEM, EQP, SERV | 5. FOREST PRODUCTS, EQUIP. SERVICES |
| 3. TRANSPORT SYS, EQUIP, COMP, SERV. | |

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

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	2500.00 \$M	2500.00 \$M	2600.00 \$M	2700.00 \$M
Canadian Exports	25.00 \$M	25.00 \$M	26.00 \$M	26.00 \$M
Canadian Share of Market	0.10 %	0.10 %	0.10 %	0.10 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	0.00 %
AUSTRALIA	0.00 %
CANADA	0.00 %
NEW ZEALAND	0.00 %
DENMARK	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. Precooked
2. Restaurant packaged meats
3. Leaner/premium cuts
4. Beef-value added
5. Pork-value added
6. Gourmet

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

12/12/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- _____
- _____

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

Activity: Action 35 trade enquiries

Expected Results: Establish 15 new buying/trade connections

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

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	36000.00 \$M	40000.00 \$M	42000.00 \$M	44000.00 \$M
Canadian Exports	218.00 \$M	222.00 \$M	231.00 \$M	235.00 \$M
Canadian Share of Market	0.60 %	0.60 %	0.60 %	0.50 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	47.00 %
EUROPEAN COMMON MARKET C	38.00 %
CANADA	15.00 %

Products/services for which there are good market prospects:

1. Value added prepared foods
2. Beverages-packaged juices, waters, etc.
3. "Real" dairy 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
- Trade Fair activity
- Provincial export promotion
- Competitive pricing

Factors for Canadian exports not reaching market potential:

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

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

Activity: Research institutional food distributors re: products and services

Expected Results: Create directory and profile of institutional food distrib.

Activity: Action 120 trade enquiries

Expected Results: Establish 50 new buying connections

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

Activity: Food Marketing Institute Show (FMI), May 1990

Expected Results: 8 coys exhibit; 30 new rep/broker agreement;\$2 million sales

Activity: Taste of Canada, March 1991, solo food show

Expected Results: 75 coys exhibit; 100 new buying connections;\$6 million sales

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: AGRICULTURE MACH, EQUIP, TOOLS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	7400.00 \$M	7500.00 \$M	7650.00 \$M	770.00 \$M
Canadian Exports	115.00 \$M	115.00 \$M	118.00 \$M	119.00 \$M
Canadian Share of Market	1.60 %	1.50 %	1.50 %	1.60 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	0.00 %
JAPAN	0.00 %
EUROPE	0.00 %

Products/services for which there are good market prospects:

1. Technology advanced balers
2. Forage harvesters, mowers, conditioners, tractors

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Trade Fair activity
- Competitive pricing

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- _____
- _____

12/12/89

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

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

Activity: Action 25 trade enquiries
Expected Results: Establish 20 new buying connections

Activity: Western Canada Farm Progress Show, June 1990
Expected Results: Recruit 10 buyers; 5 new dealer networks established

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

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	280000.00 \$M	290000.00 \$M	300000.00 \$M	310000.00 \$M
Canadian Exports	18000.00 \$M	19000.00 \$M	19000.00 \$M	20000.00 \$M
Canadian Share of Market	6.40 %	6.60 %	6.30 %	6.50 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	0.00 %
GERMANY WEST	0.00 %
NETHERLANDS	0.00 %
JAPAN	0.00 %
ITALY	0.00 %
UNITED KINGDOM	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. High technology equipment re:prepared foods
2. High speed wrapping/packaging equipment parts
3. Glass packaging machinery

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

Factors for Canadian exports not reaching market potential:

- _____
- _____

12/12/89

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

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

Activity: Action 50 trade enquiries
Expected Results: Establish 20 new buying/trade connections

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

Activity: National Restaurant Association Show (NRA), May 1990
Expected Results: 16 coys exhibit-100 reps/distr.apptd; sales of \$15 million

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

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	13000.00 \$M	13400.00 \$M	13668.00 \$M	13700.00 \$M
Canadian Exports	23.00 \$M	23.00 \$M	23.00 \$M	23.00 \$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: 100+ \$M

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	0.00 %
JAPAN	0.00 %
ICELAND	0.00 %

Products/services for which there are good market prospects:

1. All seafoods-fresh and frozen
2. Convenience foods
3. Gourmet and "finger" foods
4. Surimi-based, intermediary minced fish

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

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: CHICAGO

Market: UNITED STATES OF AMERICA

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

Activity: Action 50 trade enquiries
Expected Results: Establish 40 new trade connections; sales of \$5+ 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: Research/develop profile on fish brokers and distributors
Expected Results: Mini market guide on Who's Who in fish industry

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

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	6000.00 \$M	6000.00 \$M	6000.00 \$M	5500.00 \$M
Canadian Exports	39.00 \$M	45.00 \$M	50.00 \$M	50.00 \$M
Canadian Share of Market	0.65 %	0.75 %	0.83 %	0.90 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	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. Weapons systems
2. Ammunition

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Competitive pricing
- CCC Involvement

Factors for Canadian exports not reaching market potential:

- _____
- _____

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

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

Activity: Liaison calls on major purchasers
Expected Results: \$2 million incremental 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: Produce Guide to Doing Business at AMCCOM
Expected Results: 4 new buying connections

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: ELECTRICAL & ELECTRONIC

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	2700.00 \$M	3000.00 \$M	3000.00 \$M	3000.00 \$M
Canadian Exports	143.00 \$M	145.00 \$M	150.00 \$M	155.00 \$M
Canadian Share of Market	5.30 %	4.80 %	5.00 %	5.60 %

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

Major Competing Countries Market Share

UNITED STATES OF AMERICA	0.00 %
NATO, BRUSSELS	0.00 %
JAPAN	0.00 %
ISRAEL	0.00 %
AUSTRALIA	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. Avionics
2. Flight safety equipment
3. Ground control systems

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Competitive pricing
- CCC involvement as prime

Factors for Canadian exports not reaching market potential:

- _____
- _____

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

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

Activity: Liaison calls on major purchasers
Expected Results: \$2 million incremental sales

Activity: Participation in Canada/AVSCOM DDSP working group
Expected Results: \$5 million in DDSP projects

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

Activity: AVSCOM mission to High Tech, Ottawa, May 1990
Expected Results: 4 buying connections

Activity: AVSCOM mission to AIAC Convention, September 1990
Expected Results: 2 buying connection

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

Activity: Outgoing mission to AVSCOM, November 1990
Expected Results: 2 buying connections

Activity: Outgoing mission to AVSCOM, February 1991
Expected Results: 2 buying connections

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

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	2900.00 \$M	2500.00 \$M	2500.00 \$M	2200.00 \$M
Canadian Exports	1.70 \$M	2.00 \$M	2.00 \$M	2.00 \$M
Canadian Share of Market	0.05 %	0.06 %	0.08 %	0.09 %

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 %

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

Products/services for which there are good market prospects:

1. Specialized steel
2. Publications

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

Factors for Canadian exports not reaching market potential:

- Strong domestic supply base
-

12/12/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

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

Activity: Calls on identified buyers in government and private sector procurement organizations

Expected Results: \$500k in incremental sales

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: AEROSPACE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	3100.00 \$M	3000.00 \$M	3000.00 \$M	2700.00 \$M
Canadian Exports	21.00 \$M	23.00 \$M	25.00 \$M	23.00 \$M
Canadian Share of Market	0.68 %	0.76 %	0.83 %	0.85 %

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

Major Competing Countries Market Share

UNITED STATES OF AMERICA	0.00 %
AUSTRALIA	0.00 %
SPAIN	0.00 %
ISRAEL	0.00 %
NATO, BRUSSELS	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. Repair and overhaul
2. R & D
3. Propulsion systems

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
- Niche marketing, CCC

Factors for Canadian exports not reaching market potential:

- Limited appreciation/understanding of distribution system
- Lack of sustained effort

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

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

Activity: Follow-up previous NTS missions 1987-89
Expected Results: \$8 million incremental sales

Activity: Participate in DEA/AVSCOM joint working group
Expected Results: \$10 million in DDSF over 5 years

Activity: Produce Guide to the Military Market
Expected Results: 3 buying connections

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

Activity: AVSCOM participation in High Tech, May 1990
Expected Results: 3 buying connections

Activity: AVSCOM participation in AIAC Convention, September 1990

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

Activity: Outgoing mission to AVSCOM, November 1990
Expected Results: 2 new buying connections

Activity: Outgoing mission to AVSCOM, February 1991
Expected Results: 3 new buying connections

Activity: Incoming mission from AVSCOM, October 1990
Expected Results: 7 new buying connections

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

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

Army Aviation Assoc.America
Orlando, FL, 15-19Apr90

Approximate Value: 0 M\$
Financing Source :
Contact : R. Crouch, 314/862-0130

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

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	9000.00 \$M	9500.00 \$M	9900.00 \$M	10500.00 \$M
Canadian Exports	109.00 \$M	116.00 \$M	123.00 \$M	125.00 \$M
Canadian Share of Market	1.20 %	1.20 %	1.20 %	1.20 %

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 %
JAPAN	20.00 %
SINGAPORE	5.00 %
KOREA	5.00 %
TAIWAN	5.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. Software
2. Components
3. Laptop computers

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
- Strong sectoral capability in Canada
- Bilateral economic trade agreement
- Willingness of exporters to invest/joint venture in territory

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- 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: Determine interest generated from distribution of Cdn. capability directory to U.S. distributors/users in territory
Expected Results: Distributors for 10 Cdn. companies; sales of \$1.5 million
- Activity: Guide to market opportunities in computer software
Expected Results: Increased sales of Cdn. software; 3 new suppliers to market
- Activity: Implement Cdn. participation at PC Expo, October 1990
Expected Results: 10 Cdn. coys; projected \$10 million sales; 20 distributors

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

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	3700.00 \$M	3800.00 \$M	3900.00 \$M	4100.00 \$M
Canadian Exports	88.00 \$M	90.00 \$M	92.00 \$M	93.00 \$M
Canadian Share of Market	2.40 %	2.40 %	2.40 %	2.30 %

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 %
JAPAN	20.00 %
UNITED KINGDOM	5.00 %
GERMANY WEST	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. Remote sensing

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
- Bilateral economic trade agreement
- Willingness of exporters to invest/joint venture in territory

Factors for Canadian exports not reaching market potential:

- Limited Canadian capabilities
- Performance of local agent or representative

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

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

Activity: Identify market opportunities in territory

Expected Results: Ability to match local needs with Cdn. supply capability

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: INSTRUMENT & PROCESS CONTROLS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	6500.00 \$M	7000.00 \$M	7800.00 \$M	8100.00 \$M
Canadian Exports	160.00 \$M	171.00 \$M	185.00 \$M	195.00 \$M
Canadian Share of Market	2.50 %	2.40 %	2.40 %	2.40 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	45.00 %
JAPAN	25.00 %
KOREA	5.00 %
EUROPEAN COMMON MARKET C	5.00 %

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

Products/services for which there are good market prospects:

1. Instrumentation
2. Flow process controls
3. Automotive electronics

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Fairs and Missions support
- Bilateral economic trade agreement

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Limited Canadian capabilities

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

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

Activity: NEXUS mission to Quality Expo Time, April 1990
Expected Results: 20 Cdn. companies recruited

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

Activity: Evaluate opportunities for Cdn. participation at
Quality Expo Time, April 1990
Expected Results: Decision re participation with national stand in 1991

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: ROBOTICS & ARTIFI. INTELLIGE.

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	55.00 \$M	55.00 \$M	56.00 \$M	56.00 \$M
Canadian Exports	1.00 \$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: 3-5 \$M

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	65.00 %
JAPAN	30.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. Software

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
- Bilateral economic trade agreement
- Willingness of exporters to invest/joint venture in territory

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Unsuitable product
- Limited appreciation/understanding of distribution system
- Limited Canadian capabilities
- Market prospects have not been adequately explored

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

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

- Activity: Implment Cdn.participation at 2 related trade shows
(Assembly Tech 9/90, AMS 5/90)
Expected Results: 20 new distributors appointed; \$2.5 million projected sales
- Activity: NEXUS mission to Assembly Tech 9/90
- Activity: Produce a market opportunities guide for Illinois, Missouri
and Wisconsin
Expected Results: 5 new Cdn. companies export to territory

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

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	30000.00 \$M	33000.00 \$M	33000.00 \$M	37000.00 \$M
Canadian Exports	1503.00 \$M	1505.00 \$M	1507.00 \$M	1508.00 \$M
Canadian Share of Market	4.70 %	4.70 %	4.68 %	4.70 %

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 %
JAPAN	15.00 %
TAIWAN	5.00 %
KOREA	3.00 %
FRANCE	2.00 %

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

Products/services for which there are good market prospects:

1. Parts and accessories-aftermarket
2. Engines and parts
3. Trucks/chassis

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
- Willingness of exporters to invest/joint venture in territory

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

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: Aftermarket strategy development including Japanese manufacturers/suppliers

Expected Results: Broader market penetration; multiple sourcing

Activity: Identify new buyers in automotive aftermarket for Canadian companies to call on

Expected Results: Locate 10-15 potential new buyers

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

Activity: Participate in APAA, August 1990, and followup of show enquiries

Expected Results: 15 new sales agreements and 10 new agents appointed

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

Activity: Make contact with post auto plants through purchasing depts.

Expected Results: Create "needs" list for Cdn. mfrs. to use as selling guide

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

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	50.00 \$M	50.00 \$M	450.00 \$M	0.00 \$M
Canadian Exports	2.00 \$M	2.00 \$M	28.00 \$M	0.00 \$M
Canadian Share of Market	4.00 %	4.00 %	6.00 %	0.00 %

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

Major Competing Countries Market Share

ITALY	0.00 %
FRANCE	0.00 %
GERMANY WEST	0.00 %
JAPAN	0.00 %

Products/services for which there are good market prospects:

1. Light rail cars
2. Buses
3. Heavy rail cars
4. Bus parts
5. Para-transit vehicles

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
- Competitive Canadian financing

Factors for Canadian exports not reaching market potential:

- _____
- _____

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

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

Activity: track and evaluate bid process for 400 subway cars-Chicago
Expected Results: \$700 million bid let in January, 1990

Activity: Track and bid process for 40 commuter rail cars-Chicago
Expected Results: \$50 million bid let in March 1990

Activity: Track and bid process for 36 light rail cars-St. Louis
Expected Results: \$40million bid let in January 1990

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 UTDC and Bombardier bids and Ontario Bus delivery to Madison, WI and Milwaukee, WI

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: MARINE INDUSTRIES

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	616.00 \$M	660.00 \$M	700.00 \$M	710.00 \$M
Canadian Exports	17.00 \$M	19.00 \$M	21.00 \$M	21.00 \$M
Canadian Share of Market	2.70 %	2.90 %	3.00 %	3.00 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	70.00 %
EUROPEAN COMMON MARKET C	5.00 %
JAPAN	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. Powerboats aftermarket
2. Sailboats aftermarket

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

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Unsuitable product
- Performance of local agent or representative

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

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

Activity: Territory buyers on mission to Toronto Boat Show-
February 1991
Expected Results: Expand knowledge of Cdn. supply potential

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

Activity: Negotiate with NMMA organizers for Cdn. national stand at
IMTEC 1990
Expected Results: Cdn. stand at IMTEC 1990; 15 companies participate

Activity: NEXUS mission to IMTEC, September 1990
Expected Results: 20 Cdn. companies to attend

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 Guide for Canadian Powerboat/Sailboat exporters-
list key national/regional shows in territory
Expected Results: 5 new exporters selling to post territory

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

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	2820.00 \$M	3000.00 \$M	2800.00 \$M	2800.00 \$M
Canadian Exports	850.00 \$M	960.00 \$M	960.00 \$M	960.00 \$M
Canadian Share of Market	30.00 %	32.00 %	34.00 %	34.00 %

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 %
SCANDINAVIA	3.00 %
SOUTH AMERICA	2.00 %
AUSTRALIA	1.00 %

Current Status of Canadian

exports in this sector/subsector: Mature with little growth

Products/services for which there are good market prospects:

1. Construction grade lumber
2. Millwork
3. Mouldings
4. Plywood

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

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- _____
- _____

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

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

Activity: Cosponsorship of North American Wholesale Lumber Association (NAWLA) sector meeting

Expected Results: Improve distribution/access of Canadian product

Activity: Industry support through COFI/CLA

Expected Results: Marketing information provided to industry

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

Activity: Home Center Show, March 1991

Expected Results: 2 wood products companies will participate

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

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	3219.00 \$M	3409.00 \$M	3500.00 \$M	3590.00 \$M
Canadian Exports	81.00 \$M	87.00 \$M	90.00 \$M	92.00 \$M
Canadian Share of Market	2.50 %	2.50 %	2.63 %	2.60 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	87.00 %
GERMANY WEST	0.00 %
MEXICO	0.00 %
JAPAN	0.00 %
UNITED KINGDOM	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. Metal fabrication
2. Investment casting
3. Precision 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
- Provincial export promotion
- Competitive pricing
- 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: CHICAGO

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- 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: Responsive workload-minimal from territory

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

Activity: Promote Consulate General and WIN sourcing for purchasing agents

Expected Results: Generate 50-75 new leads for Canadian companies

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

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	3219.00 \$M	3409.00 \$M	3545.00 \$M	3710.00 \$M
Canadian Exports	81.00 \$M	87.00 \$M	98.00 \$M	100.00 \$M
Canadian Share of Market	2.50 %	2.60 %	3.00 %	3.10 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	87.00 %
JAPAN	0.00 %
GERMANY WEST	0.00 %
UNITED KINGDOM	0.00 %
MEXICO	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. Resource recovery system
2. Coal mining machinery

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Bilateral economic trade agreement

Factors for Canadian exports not reaching market potential:

- _____
- _____

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

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

Activity: Seek out new and productive participation-oriented
 industry show/fair

Expected Results: 10-15 new agents to be established

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

Sector : OIL & GAS EQUIPMENT, SERVICES

Sub-Sector: PETROLEUM AND PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1444.00 \$M	1509.00 \$M	1569.00 \$M	1580.00 \$M
Canadian Exports	448.00 \$M	452.00 \$M	500.00 \$M	515.00 \$M
Canadian Share of Market	31.00 %	30.00 %	32.00 %	34.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	70.00 %
JAPAN	10.00 %
KOREA	5.00 %
TAIWAN	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. Plastic materials and resins
2. Plastic products

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Limited appreciation/understanding of distribution system
- _____
- _____

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

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

Activity: Responsive workload growing
Expected Results: 10 new contacts

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

Activity: Assist in post recruitment for Toronto Plastics Show, 1990
Expected Results: 3-5 agents for Canadian companies

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

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	1050.00 \$M	1080.00 \$M	1100.00 \$M	1120.00 \$M
Canadian Exports	23.00 \$M	25.00 \$M	27.00 \$M	29.00 \$M
Canadian Share of Market	2.20 %	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

UNITED STATES OF AMERICA	0.00 %
HONG KONG	0.00 %
TAIWAN	0.00 %
JAPAN	0.00 %
KOREA	0.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. Fashion conscious clothes appealing to ages 35-54
2. Women's career clothing and outerwear
3. Women's and men's activewear
4. Childrens wear - all ages

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Trade Fair activity
- Competitive pricing

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: CHICAGO

Market: UNITED STATES OF AMERICA

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

Activity: Action 100 trade enquiries
Expected Results: Establish 50 new trade contacts

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

Activity: Canadian International Womenswear Show, October 1990
Expected Results: Recruit 6 buyers; sales \$.5 million

Activity: Canadian International Womenswear Show, March 1991
Expected Results: Recruit 24 buyers; sales \$2 million

Activity: Leathermark '91, March 1990
Expected Results: Recruit 5 buyers; sales \$.5 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: Conduct apparel study on the St. Louis, MO marketplace
Expected Results: Establish 25 new buying connections

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: CULTURE INDUSTRIES

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	10.00 \$M	10.00 \$M	10.50 \$M	11.00 \$M
Canadian Exports	0.25 \$M	0.25 \$M	0.50 \$M	0.50 \$M
Canadian Share of Market	2.50 %	2.50 %	4.50 %	4.50 %

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

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

Products/services for which there are good market prospects:

1. Publications
2. Visual arts
3. Performing artists handling by PERPA Section
4. Handicrafts

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:

- Lack of promotion and advertising
 - Limited appreciation/understanding of distribution system
-

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

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

Activity: Identify and research art dealers in territory
Expected Results: Compendium of galleries/museum focusing on merchandise lines

Activity: Action 25 trade enquiries
Expected Results: Establish 10 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: Continue to carry out evaluation of art fairs
Expected Results: Post assessment of Cdn. participation re grants (BKA)

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

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	122247.00 \$M	143820.00 \$M	169200.00 \$M	194580.00 \$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

UNITED STATES OF AMERICA	30.00 %
TAIWAN	20.00 %
KOREA	20.00 %
EUROPEAN COMMON MARKET C	20.00 %
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. Hardware
2. Sporting Goods
3. Housewares
4. Toys and games

Factors contributing to current successful Canadian exports:

- Import duties are moderate
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Provincial export promotion
- Competitive pricing

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Restrictive standards
- Lack of promotion and advertising
- 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: Housewares Show, January 1990
Expected Results: On site sales \$10,000; 3 agents appointed

Activity: Home Center Show, March 1990
Expected Results: On site sales 30,000; 6 agents appointed

Activity: Market Guide for Sporting Goods
Expected Results: Improved exporter awareness

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

Activity: Hardware Show, August 1990
Expected Results: On site sales \$50,000; 10 agents appointed

Activity: Housewares Show, January 1991
Expected Results: On site sales \$15,000; 3 agents appointed

Activity: Home Center Show, March 1991
Expected Results: On site sales \$30,000; 7 agents appointed

Activity: Sporting Goods Show, July 1990
Expected Results: On site sales \$25,000; 6 agents appointed

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

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

Activity: Housewares NEXUS, July 1990
Expected Results: Increased exporter awareness

Activity: Phase II advertising: Hardware
Expected Results: 6 companies receive exposure

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: FURNITURE & APPLIANCES

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	170000.00 \$M	180000.00 \$M	210000.00 \$M	220000.00 \$M
Canadian Exports	20000.00 \$M	21000.00 \$M	25000.00 \$M	28000.00 \$M
Canadian Share of Market	11.70 %	11.60 %	12.20 %	12.50 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	0.00 %
TAIWAN	0.00 %
JAPAN	0.00 %
GERMANY WEST	0.00 %
DENMARK	0.00 %
EUROPE	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. Residential-all price points
2. Contract-moderate to high
3. Contemporary
4. Traditional
5. Case goods
6. K.D. furniture
7. Upholstered
8. Leather goods

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- _____
- _____

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

Activity: Action 70 trade enquiries
Expected Results: Establish 30 new trade contacts

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

Activity: Montreal Furniture Fair, June 1990
Expected Results: Recruit 10 buyers resulting in sales of \$2 million

Activity: IIDEX, November 1990
Expected Results: Recruit 25 designers resulting in sales of \$7 million

Activity: Toronto Furniture Fair, January 1991
Expected Results: Recruit 6 buyers resulting in sales of \$.5 million

Activity: National Office Products Association, October 1990
Expected Results: 10 coys to exhibit resulting in 12 new reps; sales \$3 million

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: CONSUMER ELECTRONICS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	700.00 \$M	750.00 \$M	880.00 \$M	900.00 \$M
Canadian Exports	10.00 \$M	12.00 \$M	18.00 \$M	20.00 \$M
Canadian Share of Market	1.50 %	1.60 %	2.00 %	2.20 %

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

Major Competing Countries

Market Share

JAPAN	50.00 %
UNITED STATES OF AMERICA	25.00 %
KOREA	9.00 %
TAIWAN	7.00 %

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

Products/services for which there are good market prospects:

1. High end specialty audio
2. Security systems
3. Audio/visual hardware

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

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Limited Canadian capabilities
- _____
- _____

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

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

Activity: Implement Cdn. participation with national stand at
Consumer Electronics Show, June 1990
Expected Results: 10 Cdn. participants; \$1.5 million projected 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: Consumer Electronics Marketing Guide-identify market op-
portunities for Cdn. exporters; list regional/national shows
Expected Results: 4 new Cdn. suppliers enter market in this territory

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

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	200000.00 \$M	200000.00 \$M	210000.00 \$M	210000.00 \$M
Canadian Exports	6.00 \$M	6.40 \$M	6.40 \$M	6.30 \$M
Canadian Share of Market	3.00 %	3.20 %	3.70 %	3.00 %

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 %
EUROPEAN COMMON MARKET C	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. Plastic disposable devices
2. Resuable medical products
3. Low cost imaging machines

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Trade Fair activity
- Competitive pricing

Factors for Canadian exports not reaching market potential:

- _____
- _____

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

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

Activity: Respond to sourcing inquiries from American Hospital Association Show

Expected Results: Action 15 local/15 Canadian companies

Activity: Complete Guide to Selling to U.S. Veteran's Administration

Expected Results: Improved exporter awareness leading to 3 new Cdn. exporters

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

Activity: Compendium of health care facilities in post territory

Expected Results: 4 new Cdn. suppliers; improved exporter awareness

Activity: Collect market data and sourcing requirements from major U.S. corporations

Expected Results: 10 new buyer connections

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

Sector : CONSTRUCTION INDUSTRY

Sub-Sector: BUILDING PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1000.00 \$M	1000.00 \$M	1000.00 \$M	1000.00 \$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: 100+ \$M

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	90.00 %
EUROPEAN COMMON MARKET C	5.00 %
PACIFIC RIM COUNTRIES	5.00 %

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

Products/services for which there are good market prospects:

1. Roofing materials
2. Insulation
3. HVAC equipment
4. Windows

Factors contributing to current successful Canadian exports:

- Import duties are moderate
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Provincial export promotion
- Competitive pricing

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
 - Restrictive standards
 - Non-competitive pricing
 - Lack of promotion and advertising
 - 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: Speech at I.D.E.A.S. Seminar, February 1990
Expected Results: 6 companies learn of opportunities

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

Activity: Construction Specifiers Institute, June 1990
Expected Results: On site sales \$25,000; 2 agents appointed

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 bid mechanisms for Chicago area
Expected Results: 4 companies bid on Chicago projects

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

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	3397.00 \$M	3520.00 \$M	3625.00 \$M	3700.00 \$M
Canadian Exports	220.00 \$M	228.00 \$M	235.00 \$M	236.00 \$M
Canadian Share of Market	6.50 %	6.50 %	6.50 %	6.70 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	89.00 %
GERMANY WEST	0.00 %
JAPAN	0.00 %
MEXICO	0.00 %
UNITED KINGDOM	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. Material handling
2. Industrial machinery
3. Mining
4. Metalworking

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
- 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: CHICAGO

Market: UNITED STATES OF AMERICA

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: Complete post produced regional market study

Activity: Make 10-15 outcalls on public/private sector firms to promote Canadian products

Expected Results: 3-5 new buying connections

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

Activity: Design Engineering Show, 1990

Expected Results: 15 Cdn.coys to make sales arrangements; 10-15 agents apptd.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

Sector : INDUSTRIAL MACHIN, PLANTS, SERV.

Sub-Sector: TOOLS & HARDWARE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	881.00 \$M	868.00 \$M	860.00 \$M	858.00 \$M
Canadian Exports	13.20 \$M	13.00 \$M	12.90 \$M	12.60 \$M
Canadian Share of Market	1.50 %	1.50 %	1.50 %	1.50 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	97.00 %
JAPAN	0.33 %
PORTUGAL	0.39 %
GERMANY WEST	0.18 %

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

Products/services for which there are good market prospects:

1. Tools, dies and moulds
2. Specialized tools

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 Canadian financing
- Willingness of exporters to invest/joint venture in territory

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

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

Activity: Implement finds of Tool and Die Market Study

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: CHICAGO

Country: UNITED STATES OF AMERICA

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
Two years ago	18100.00	50.00	50.00
One year ago	19000.00	50.00	50.00
Current year	19500.00	49.00	51.00

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:

\$2.798 billion: 2 major corp. acquisitions \$1.56 b.; net new portfolio investment \$1.0 billion; medium to long term paper \$150 million; portfolio equities \$75 million; 12 small/med. corp. acquisitions @ \$1 million=\$12 million; 5 Greenfield investment @ \$250k=\$1.25 million.

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

- U.K.
- W. Germany
- Japan
- S.E. Asia

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

- Seminars to selected groups of potential investors.
- Mailings of investment materials.

IDP Partners and related program activities:

- Provincial Government Economic Development Officers
- Manning investment booth at trade shows; informational material; seminars

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: CHICAGO

Country: UNITED STATES OF AMERICA

IDP Partners and related activities cont d:

Municipal Economic Development Officers
- -Canadian Chartered Banks; Corporate Investment Officers
- -Canadian Accounting and Legal Firms
- Seminar speakers/organizers; provide materials.ISTC HQ and Regional Officers
- Provide materials; staff investment booth at trade showsLocal Chambers of Commerce
- Liaison on seminar attendees; speakersU. S. Department of Commerce
- Liaison on seminar attendees; speakersU. S. Small Business Administration
- -

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

- Similar business practices and life styles.
- Good communications/proximity.
- Stable political climate.
- No controls on flow of funds.

the following constraints:

- Labour relations, wage rates and employee benefit packages.
- View of Canada as small market.
- Uncertainty over Goods and Services Tax.

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	LOW
Joint Venture	MEDIUM
Strategic Partnering	LOW
Technology Licensing	MEDIUM

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RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: CHICAGO

Country: UNITED STATES OF AMERICA

The mission believes that the following sectors are of greatest interest to investors in its territory/country an assigned ranking A = High B = Medium C = Low

Sector	Ranking
Agriculture/Food/Fish	B
Resource Processing	C
Machinery and Equipment	A
Transportation	C
Consumer Products	B
Commercial Service	A
Computer and Communications	A
Health Care Products/Medical	B
Aerospace and Defence	B
Strategic Technologies	B

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: CHICAGO

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

Seq #	Date
Type: MISSION OUT, MINISTERIAL	
7	08/90
Event Description:	
Speaking engagements promoting trade and investment	
City	:CHCGO,SLOUI,MILW,KC
Country	:UNITED STATES OF AMERICA
Investment Nature:	
Investment Sector:COMMERCIAL SERVICE	
Event Cooperants :	
EAITC/MINT, Investment Canada, territory Chambers of Commerce	
Estimated Budget :	\$5,000.00
Type: SEMINAR, ABROAD	
9	09/90
Event Description:	
3 mini-seminars at selected trade shows with province participation on Canadian capabilities/needs;Sep/Oct/Mar	
City	:Chicago
Country	:UNITED STATES OF AMERICA
Investment Nature:Acquisition	
Joint Ventures	
Investment Sector:MACHINERY/EQUIPMENT	
Event Cooperants :	
Provinces, NRC	
Estimated Budget :	\$5,000.00
8	12/90
Event Description:	
3 hour seminars promoting trade and investment in biotechnology	
City	:St. Louis, MO
Country	:UNITED STATES OF AMERICA
Investment Nature:Acquisition	
Portfolio	
Investment Sector:STRATEGIC TECHNOLOGIES	
Event Cooperants :	
Investment Canada, Provinces, ISTC, Accounting/Legal Firms	
Estimated Budget :	\$9,000.00

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: CHICAGO

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

Seq #	Date
Type: SEMINAR, ABROAD	
10	02/91
Event Description:	
3 hour seminars on trade and investment opportunities	
City	:Quad Cities-IL, IA
Country	:UNITED STATES OF AMERICA
Investment Nature:	Acquisition
	Portfolio
Investment Sector:	STRATEGIC TECHNOLOGIES
Event Cooperants :	
	Investment Canada, Provinces, ISTC, Accounting/Legal Firms
Estimated Budget :	\$8,000.00
11	04/90
Event Description:	
3 seminars on deregulation of Canadian financial markets	
City	:CHCGO, MILW, SLOUI
Country	:UNITED STATES OF AMERICA
Investment Nature:	Acquisition
	Portfolio
Investment Sector:	COMMERCIAL SERVICE
Event Cooperants :	
	Investment Canada, Canadian Chartered Banks
Estimated Budget :	\$24,000.00
Type: OTHER PROMOTION	
5	02/91
Event Description:	
PROMAT Show	
Material handling equipment	
City	:Chicago
Country	:UNITED STATES OF AMERICA
Investment Nature:	Acquisition
	Joint Ventures
Investment Sector:	MACHINERY/EQUIPMENT
Event Cooperants :	
	Provinces, Regional Economic Development, ISTC, Banks
Estimated Budget :	\$15,000.00

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: CHICAGO

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

Seq #	Date
Type: OTHER PROMOTION	
2	05/90
Event Description:	
Food Marketing Institute (FMI) Show	
Food processing equipment and services	
City	:Chicago
Country	:UNITED STATES OF AMERICA
Investment Nature:	Acquisition
	Joint Ventures
Investment Sector:	AGRICULTURE/FOOD/FISH
Event Cooperants :	
	Provinces, Regional Economic Development, ISTC, Banks
Estimated Budget :	\$15,000.00
12	04/90
Event Description:	
Direct mailing of literature	
City	:IL,MO,WI
Country	:UNITED STATES OF AMERICA
Investment Nature:	Acquisition
	Joint Ventures
Investment Sector:	STRATEGIC TECHNOLOGIES
Event Cooperants :	
	Investment Canada, ISTC
Estimated Budget :	\$10,000.00
4	10/90
Event Description:	
Automotive Parts Aftermarket Association (APAA) Show	
Automotive parts and accessories	
City	:Chicago
Country	:UNITED STATES OF AMERICA
Investment Nature:	Acquisition
	Joint Ventures
Investment Sector:	TRANSPORTATION
Event Cooperants :	
	Provinces, Regional Economic Development, ISTC, Banks
Estimated Budget :	\$15,000.00

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: CHICAGO

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

Seq #

Date

Type: OTHER PROMOTION

- | | | |
|---|--|-------|
| 6 | Event Description:
Pack Expo Show
Packaging machinery and materials trade show
City :Chicago
Country :UNITED STATES OF AMERICA
Investment Nature:Acquisition
Joint Ventures
Investment Sector:MACHINERY/EQUIPMENT
Event Cooperants :
Provinces, Regional Economic Development, ISTC, Banks
Estimated Budget : \$15,000.00 | 11/90 |
| 3 | Event Description:
International Machine Tool Show
Machine tools, metalworking equipment
City :Chicago
Country :UNITED STATES OF AMERICA
Investment Nature:Acquisition
Joint Ventures
Investment Sector:MACHINERY/EQUIPMENT
Event Cooperants :
Provinces, Regional Economic Development, ISTC, Banks
Estimated Budget : \$15,000.00 | 09/90 |

Total estimated budget for all proposals: \$136,000.00

DEPARTMENT OF EXTERNAL AFFAIRS

PEMD - Proposed Government Promotional Activities 1990/91

Proposals As Of December 23/89

Post: Chicago

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Contact</u>
90/05/00	Nation Restaurant Association Show, Chicago Fair, National Stand	Agri & Food Products & Services
90/05/00	WASTE EXPO Chicago Fair, National Stand	Industrial Machinery Plants & Services
90/06/00	CSI 90 (Construction Specs., Institute) Chicago Fair, National Stand	Construction Industry & Services
90/08/00	National Hardware Show Chicago Fair, National Stand	Consumer Products
90/08/00	NSGA (Nat'l Sporting Goods Assn) Chicago Fair, National Stand	Consumer Products
90/10/00	Automotive Parts & Accessories Association (APAA) Chicago Fair, National Stand	Transport Sys, Products
90/10/00	GRAPH EXPO Chicago Fair, National Stand	Industrial Machinery, Plants & Services
90/10/00	FINISHING 90 Chicago Fair, National Stand	Petrochem & Chem Products
90/10/00	IMTEC Boat Show Chicago Fair, National Stand	Consumer Products
90/12/00	Construction World Chicago Fair, National Stand	Construction Industry

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: CLEVELAND

Country: UNITED STATES OF AMERICA

The Cleveland Consulate's territory includes the states of Kentucky, Ohio, Western Pennsylvania and West Virginia. One third the size of Ontario, the territory's population approaches that of Canada's. Once a centre for heavy industry, the territory has seen a steady growth in the service sector. In addition to 57 Fortune 500 industrial companies, the territory is headquarters to 33 of the Fortune 500 service firms. Two way trade between Canada and the territory reached \$19.8 billion in 1988.

Kentucky

Kentucky has enjoyed a significant boom in auto-related manufacturing plants following the arrival of the Toyota assembly plant. The overall state economy has, however, had to adjust to the softening of the tobacco and liquor industries where earnings and employment continue to fall. Up to now the adjustment has been done with posted increases in total manufacturing employment and earnings for the state. Kentucky's gross state product for 1988 is estimated at \$67 billion and per capita disposable personal income, at \$13,100. Economists with the office of investment and debt management predict that the economy will grow by 7% a year for the next few years. Two way trade (\$2.6 billion) is significant and opportunities for exports as well as investment to Canada exist. Exports for 1988 totalled \$1.4 billion and imports, \$1.2 billion. Lumber, newsprint, metal ore, metals, motor vehicle parts, engines, chassis, and computers and other office machines accounted for 70% of the total.

Ohio

Trade between Canada and Ohio in 1988 amounted to \$13.1 billion with exports totalling \$4.3 billion and imports, \$8.8 billion. Ohio's gross state product for 1988 is estimated at \$223 billion and per capita disposable personal income, at \$15,800. Although a strong service sector has developed in northern Ohio, the economy is still dominated by the auto and metals fabrication industries, both of which are doing well but are extremely vulnerable to economic fluctuations. Southern Ohio has continued to see accelerated economic development over the last year. Employment increased in all sectors with the fastest rate of growth in the construction trades and a marked expansion in the manufacturing sector. With its strong service sector and its two growth poles Columbus and Cincinnati, the area has been shown to have a very diverse economy. The growth rate for next year will be influenced to a degree by the level of the U.S. dollar on the market and the direction of the interest rate.

Western Pennsylvania

The satellite office in Pittsburgh covers a territory which includes the 28 counties of Western Pennsylvania and the entire state of West Virginia. Most of the office's resources are devoted to the area in and adjacent to Allegheny County and the city of Pittsburgh, which in recent years has enjoyed an economic revival and provides the locomotive for the economic resurgence of the western half of the state as a whole. Pittsburgh has seen a slight decline in population in recent years due to loss of jobs in the steel sector; however, the economy there is leaner and healthier as a result, with successful diversification into the high technology and service sectors. Per capita income and unemployment statistics are better than the national average and there is a strong consumer sector as well as other industrial market sectors concentrated on by our office. The gross

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: CLEVELAND

Country: UNITED STATES OF AMERICA

state product for Pennsylvania for 1988 is estimated at \$231 billion and the per capita disposable personal income, at \$16,700. In 1988 trade between Canada and Western Pennsylvania amounted to \$3.4 billion, with exports totalling \$1.65 billion and imports \$1.75 billion. Pulp and paper lumber, metals, chemicals and chemical products, motor vehicle engines and parts and electronic computers accounted for 75% of the total.

West Virginia

West Virginia, on the other hand, continues to be plagued with a difficult economic situation attributed to a combination of mismanagement by the previous state administration and industries which have been hard hit in recent years, such as steel and coal, resulting in net loss of jobs and population. The state's economy has been on the decline for some years with exceedingly high unemployment and structural problems in education, infrastructure and social services which we do not see improving in the foreseeable future. Yet there is a healthy trade between Canada and West Virginia (in 1988 trade totaled \$728 million) and opportunities exist in certain sectors, e.g., apparel. Exports amounted to \$303 million in 1988 and imports, \$425 million. Coal, metal ores, metals, chemicals and chemical products accounted for 90% of the trade volume. West Virginia's estimated gross state product for 1988 was \$31 billion. Per capita disposable personal income for the same period was estimated at \$12,200.

Defence

Defence continues to be a very important business sector in this territory despite expected budget cutbacks of approximately 5% for the coming year. The largest military organization is Wright-Patterson Air Force Base (35,000 employees) whose aeronautical systems division (ASD) purchases all aircraft, missiles and related equipment used by the United States Air Force. FY88 contractual obligations for ASD were \$13.1 billion -- 53.9% of the Air Force System Command's total obligation of \$24.3 billion. Of the \$13.1 billion, \$1.7 billion went to business in Ohio and \$90.8 million went to business/educational institutions in the greater Dayton area. There are also two defence logistics agency supply centers in Ohio whose production totalled \$1.3 billion in FY89. There are also some contract possibilities for the NASA-Lewis Research Center plus subcontracts for defence contractors.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 EXPORT PROMOTION PRIORITIES

Mission: CLEVELAND

Country: UNITED STATES OF AMERICA

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

Seven of the largest 50 food markets are located within the mission's territory; Pittsburgh(13), Cleveland(22), Cincinnati(27), Columbus(33) Louisville(43), Dayton(46) and Toledo(49). Horticulture as well as agriculture are also important sectors. The primary field crops are corn and soya. Kentucky is the centre of the American equine industry

2. DEFENCE PROGRAMS, PRODUCTS, SERV

Defence, in particular, Aeronautical Systems Division at WPAFB, is the 2nd largest in sales (to military users in the U.S. and abroad) in Ohio. In addition to contractual obligations for ASD of \$13.9 billion, Defence Logistics Agency Supply Centers in Columbus (DCSC) and Dayton (DESC) purchased \$1.3 billion in U.S. FY89.

3. ADVANCED TECH. PROD. & SERV

Of the 57 Fortune 500 companies located in the territory, half are involved in advanced technology product development. Pittsburgh in particular has become a world leader in computer hardware and software development as well as in medical technology. The territory is a centre for advanced materials and manufacturing technologies.

4. TRANSPORT SYS, EQUIP, COMP, SERV.

The territory is a centre for motor vehicle manufacturing. 13% of all automobiles and 24% of all trucks manufactured in the United States are built in Ohio. In addition, two Japanese auto assemblers Toyota and Honda have plants in the territory. There are over 500 parts and component suppliers, domestic and foreign located in the territory.

5. CONSUMER PRODUCTS & SERVICES

Two of the territory's eight major metropolitan areas, Cleveland(12) and Pittsburgh(15) are ranked in the top 20 consumer markets in the United States, with combined retail sales of \$37 billion and median income of \$30,000. Although competition is keen, Canadian consumer goods are viewed as well made and in the case of apparel, stylish.

6. INDUSTRIAL MACHIN, PLANTS, SERV.

In addition to being the centre of the American steel industry, the territory accounts for 45% of the metal working industry in the United States. The economies of all the major urban centres in the territory are dominated by companies which are manufacturers of industrial or consumer products.

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

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

4. CHEM PROD & PETROCHEM, EQP, SERV
5. DEFENCE PROGRAMS, PRODUCTS, SERV
6. INDUSTRIAL MACHIN, PLANTS, SERV.

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CLEVELAND

Market: UNITED STATES OF AMERICA

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: SEMI & PROCESSED FOOD & DRINK

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

Factors for Canadian exports not reaching market potential:

- _____
- _____

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CLEVELAND

Market: UNITED STATES OF AMERICA

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	5675.00 \$M	5700.00 \$M	5800.00 \$M	5840.00 \$M
Canadian Exports	283.00 \$M	285.00 \$M	290.00 \$M	292.00 \$M
Canadian Share of Market	5.00 %	5.00 %	5.00 %	5.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	85.00 %
MEXICO	3.00 %
BRAZIL	3.00 %
ARGENTINA	2.00 %
FRANCE	1.00 %
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. Semi and processed food and drink
2. Horticulture
3. Food handling and processing equipment
4. Agricultural machinery, equipment and tools

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
- Competitive pricing
- Strong sectoral capability in Canada

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: CLEVELAND

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

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

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

Activity: National stand with industry exhibitors at the International Lawn, Garden & Power Equipment Show, Louisville KY, July '90
Expected Results: Introduce 15 new manufacturers to the market.

Activity: Solo food show, Pittsburgh, PA, October 1990.
Expected Results: Introduce 15 new suppliers to the retail food market.

Activity: Information booth with industry exhibitors at the Ohio Grocer's Annual Convention and Trade Show, Columbus, Oct. 90
Expected Results: Introduce 20 new suppliers to the retail food market.

Activity: National stand with industry exhibitors at the National Farm Machinery Show, Louisville, KY, February 1991.
Expected Results: Introduce 15 new manufacturers to the 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: Solo gourmet food show, Cleveland OH, December 1990.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CLEVELAND

Market: UNITED STATES OF AMERICA

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	390.00 \$M	400.00 \$M	450.00 \$M	425.00 \$M
Canadian Exports	35.00 \$M	40.00 \$M	45.00 \$M	42.00 \$M
Canadian Share of Market	9.00 %	10.00 %	10.00 %	10.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	75.00 %
UNITED KINGDOM	5.00 %
GERMANY WEST	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. Aerospace research and development
2. Aerospace
3. Electrical and electronics
4. Other defence products
5. Armaments and vehicles
6. Marine
7. Security 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
- Competitive pricing
- Bilateral economic trade agreement

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: CLEVELAND

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- Unsuitable product
- Limited appreciation/understanding of distribution system
- Limited Canadian capabilities
- Increasing number of set aside & US
- prime contractor only procurments

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

- Activity: Represent Cleveland mission at Hi-Tec, Defence Export Conference, Ottawa, May 1990.
Expected Results: Introduce 20 new manufacturers to the defence export market.
- Activity: USAF independent contractor R&D review team visit to Canadian companies in October 1990.
Expected Results: Create awareness of Canadian capability.
- Activity: Information booth at the National Aerospace and Electronics Conference, Dayton, OH, May 21-25, 1990.
Expected Results: Improved awareness of Canadian capability.
- Activity: Outgoing mission to the Defence Construction Supply Center Procurement Fair, Charleston, WV, June 1990.
Expected Results: Introduce 10 new manufacturers to the defence export market.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CLEVELAND

Market: UNITED STATES OF AMERICA

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	1800.00 \$M	1900.00 \$M	1900.00 \$M	2000.00 \$M
Canadian Exports	90.00 \$M	95.00 \$M	95.00 \$M	100.00 \$M
Canadian Share of Market	5.00 %	5.00 %	5.00 %	5.00 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	50.00 %
JAPAN	25.00 %
TAIWAN	5.00 %
ITALY	5.00 %
GERMANY WEST	5.00 %
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. Instrumentation and process control
2. Robotics and artificial intelligence
3. Computers, hardware, software and components
4. Telecommunications and datacommunications

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: CLEVELAND

Market: UNITED STATES OF AMERICA

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

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

Activity: National stand with industry exhibitors at the Air and Waste Management Association Exhibition, Pittsburgh, PA, June 1990
Expected Results: Introduce 12 manufacturers to the market.

Activity: Information booth at the Federation of Analytical Chemistry & Spectroscopy Societies exposition, Cleveland, OH, Oct. 1990
Expected Results: Introduce 5 manufacturers to the market.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CLEVELAND

Market: UNITED STATES OF AMERICA

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	9125.00 \$M	9150.00 \$M	9175.00 \$M	9200.00 \$M
Canadian Exports	1825.00 \$M	1830.00 \$M	1835.00 \$M	1840.00 \$M
Canadian Share of Market	20.00 %	20.00 %	20.00 %	20.00 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	65.00 %
JAPAN	10.00 %
GERMANY WEST	5.00 %
KOREA	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. OEM Motor vehicle components and parts
2. After market motor vehicle components and parts
3. Pleasure craft
4. Marine accessories

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
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- Bilateral economic trade agreement

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: CLEVELAND

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

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

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

- Activity: Incoming buyers mission to the Toronto Boat Show, January 1991.
Expected Results: Introduce 5 buyers to the Canadian pleasure craft industry.
- Activity: National stand with industry exhibitors at the Mid-America Truck Show, Louisville KY, March 1991.
Expected Results: Introduce 15 new manufacturers to the market.
- Activity: Outgoing mission to the tier one suppliers to the transplant auto assemblers, Toyota and Honda.
Expected Results: Introduce 10 new manufacturers to the market.
- Activity: Information booth at the Great Lakes Boat Show, Sandusky OH, September 1990.
Expected Results: Introduce 5 new manufacturers to the market.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CLEVELAND

Market: UNITED STATES OF AMERICA

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	7000.00 \$M	7500.00 \$M	7500.00 \$M	8000.00 \$M
Canadian Exports	70.00 \$M	75.00 \$M	75.00 \$M	80.00 \$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	30.00 %
JAPAN	25.00 %
HONG KONG	20.00 %
TAIWAN	15.00 %
PHILIPPINES	5.00 %
KOREA	5.00 %

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

Products/services for which there are good market prospects:

1. Furniture - contract
2. Furniture - household
3. Apparel
4. Leisure products, tools and hardware
5. Cultural industries

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
- Competitive pricing

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: CLEVELAND

Market: UNITED STATES OF AMERICA

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: Follow up to the American Canadian International Sports Exposition.

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

- Activity: Organize Leathermark '91 exposition and incoming mission of apparel buyers, Toronto, February 1991.
 Expected Results: Introduce 75 new buyers to the Cdn. leather garment industry
- Activity: Incoming medical equipment mission.
 Expected Results: Introduce 10 new buyers to the industry.
- Activity: Incoming mission to IIDEX, Toronto, November 1990.
 Expected Results: Introduce 20 new buyers to the contract furniture industry.
- Activity: Incoming mission to the Montreal Furniture Show, June 1990.
 Expected Results: Introduce 15 buyers to the residential furniture industry.

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 buyers mission to the Toronto Furniture Show, January 1991.
 Expected Results: Introduce 15 buyers to the residential furniture industry.
- Activity: Incoming mission to the Canadian International Womenswear Shows, Montreal, April and September 1990.
 Expected Results: Introduce 25 new buyers to the Canadian fashion industry.
- Activity: Incoming buyers mission to the Canadian Sporting Goods Show, Toronto, February 1991.
 Expected Results: Introduce 15 new buyers to industry.
- Activity: Canadian pavilion at the American Canadian International Sports Show, Cleveland, March 1991.
 Expected Results: Introduce 10 new manufacturers to the market

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CLEVELAND

Market: UNITED STATES OF AMERICA

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	1925.00 \$M	1950.00 \$M	1950.00 \$M	2000.00 \$M
Canadian Exports	285.00 \$M	290.00 \$M	290.00 \$M	295.00 \$M
Canadian Share of Market	15.00 %	15.00 %	15.00 %	15.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	40.00 %
JAPAN	30.00 %
GERMANY WEST	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. Manufacturing plants and equipment
2. Materials handling equipment
3. Tool and hardware

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
- Competitive pricing

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Limited Canadian capabilities

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: CLEVELAND

Market: UNITED STATES OF AMERICA

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

Activity: Follow up to Castings mission of January 1990.

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

Activity: Information booth with industry exhibitors at the Surface Mining Show, Charleston, WV, April 1990.

Expected Results: Introduce 5 new manufacturers to the market.

Activity: National stand with industry exhibitors at the American Ceramics Show, Cincinnati OH, May 1990.

Expected Results: Introduce 10 new manufacturers to the market.

Activity: Information booth with industry exhibitors at Coal Prep '90, Cincinnati OH, May 1990.

Expected Results: Introduce 10 new manufacturers to the market.

Activity: National stand with industry exhibitors at the American Water Works Association Show, Cincinnati OH, June 1990.

Expected Results: Introduce 12 new manufacturers to the 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: Information booth at the National Solid Wastes Management Association, Wastes Expo., Cleveland OH, June 19-20 1990.

Expected Results: Introduce 10 new manufacturers to the market.

Activity: National stand with industry exhibitors at the Engineering and Plumbing Exhibition, Cincinnati, OH, November, 1990.

Expected Results: Introduce 10 new manufacturers to the market.

Activity: Information booth with industry exhibitors at the Great Lakes Industrial Show, Cleveland OH, November 1990.

Expected Results: Introduce 5 new companies to the market.

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: CLEVELAND

Country: UNITED STATES OF AMERICA

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
Two years ago	500.00	15.00	10.00
One year ago	500.00	15.00	10.00
Current year	500.00	15.00	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:

Although the territory, Kentucky, Ohio, Western Pennsylvania and West Virginia has an active investment promotion program Canada can expect to attract, in specific sectors, notably, automotive parts, advanced materials technology, and defence between \$50 and \$100 million in new investment next year.

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

- European Economic Community.
- Mexico
- China
- Taiwan
- Association of Southeast Asia Nations

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

- Almost all nations seeking investors from our territory but in particular, the European Economic Community, rely on advertisements in the national business press and in the weekly news magazines. They also make use of "special sections" in these magazines to gain more extensive coverage

IDP Partners and related program activities:

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: CLEVELAND

Country: UNITED STATES OF AMERICA

IDP Partners and related activities cont d:

University of Pittsburgh (NETAC)
- Seminar co-sponsor.

Government of Ontario
- Seminar co-sponsor.

Government of Quebec
- Semincar co-sponsor.

Wyatt, Tarrant and Combs of Louisville KY
- Seminar co-sponsor.

KPMG Peat Marwick of Cleveland, Louisville, Pittsburgh, and
Toronto.
- Seminar co-sponsor.

Hahn Loeser Park of Cleveland OH
- Seminar co-sponsor.

Benesch, Friedlander, Coplan and Aronoff of Cleveland
- Seminar co-sponsors.

Meyer, Unkovic and Scott of Pittsburgh
- Seminar co-sponsors.

Chambres of Commerce of Cleveland, Columbus, Dayton
Louisville and Pittsburgh.
- Seminar co-sponsors

County economic development authorities.
- Seminar co-sponsors

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: CLEVELAND

Country: UNITED STATES OF AMERICA

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

- The proximity of Canada is an advantage as particularly during the early stages of an investment there is a myriad of details which must be attended to.
- Canada's economic and political stability is viewed as a major advantage. The legal system which insures due process is a strong plus in Canada's favour.
- Canadian business practises and the infrastructure on which business depends; communications, transportation, finance etc., are so similar that they are often taken for granted.
- The Free Trade Agreement, although designed primarily to facilitate trade, will have a major positive impact as the rules governing investment activities have been spelled out.
- The costs of the factors of production, capital and operating can be determined in advance and can be depended on to change in a predictable manner.

the following constraints:

- There is a very strong public sector program of attracting investment to the territory which makes the territory itself a competitor for investment funds.
- The public sector at the state level has in the case of new technologies created agencies to link the business sector with R&D labs to keep development within the state.
- There is a residual aversion to the FIRA and there is a hint of concern that should foreign investment because of its impact become an issue again, sanctions may be imposed.
- The very openness of the Canadian economy made even more so by the Free Trade Agreement, works to Canada's disadvantage as it is so easy to export products so why bother investing.
- Although certainly not a major constraint, the lack of regular coverage in the print or electronic media of Canadian affairs affects awareness and understanding.

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	HIGH
Strategic Partnering	LOW
Technology Licensing	MEDIUM

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: CLEVELAND

Country: UNITED STATES OF AMERICA

The mission believes that the following sectors are of greatest interest to investors in its territory/country an assigned ranking A = High B = Medium C = Low

Sector	Ranking
Agriculture/Food/Fish	C
Resource Processing	B
Machinery and Equipment	C
Transportation	A
Consumer Products	C
Commercial Service	A
Computer and Communications	A
Health Care Products/Medical	B
Aerospace and Defence	C
Strategic Technologies	B

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: CLEVELAND

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

Seq #

Date

Type: ENTREPRENURIAL SEMINAR

- | | | |
|---|--|-------|
| 6 | Event Description:
The event will be a seminar entitled "Doing Business With Cda." and will focus on Advanced Manufacturing Technologies.
City :Cleveland
Country :UNITED STATES OF AMERICA
Investment Nature:Technology Lic.
Strategic Part.
Joint Venture
Investment Sector:STRATEGIC TECHNOLOGIES
Event Cooperants :
Not selected yet.
Estimated Budget : \$3,000.00 | 01/91 |
| 5 | Event Description:
The event will be a seminar entitled "Doing Business With Canada" which will focus on the automotive sector.
City :Columbus
Country :UNITED STATES OF AMERICA
Investment Nature:Greenfield
Joint venture
Investment Sector:TRANSPORTATION
Event Cooperants :
Not selected yet
Estimated Budget : \$2,500.00 | 02/91 |
| 4 | Event Description:
The event will be a seminar entitled "Doing Business With Canada" and which will focus on the automotive industry.
City :Louisville
Country :UNITED STATES OF AMERICA
Investment Nature:Greenfield
Joint venture
Investment Sector:TRANSPORTATION
Event Cooperants :
Not selected as yet.
Estimated Budget : \$2,500.00 | 11/90 |

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: CLEVELAND

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

Seq #	Date
Type: ENTREPRENURIAL SEMINAR	
1	05/90
Event Description: High level presentation on Canadian investment climate.	
City :Pittsburgh	
Country :UNITED STATES OF AMERICA	
Investment Nature:Various	
Investment Sector:STRATEGIC TECHNOLOGIES	
Event Cooperants :	
None selected yet.	
Estimated Budget : \$2,000.00	
Type: OUTCALL PROGRAM	
3	10/91
Event Description: Corporate liaison with Fortune 500 companies.	
City :	
Country :UNITED STATES OF AMERICA	
Investment Nature:Various	
Investment Sector:STRATEGIC TECHNOLOGIES	
Event Cooperants :	
Estimated Budget : \$0.00	
Type: OTHER PROMOTION	
2	10/91
Event Description: Corporate liaison with Fortune 500 companies.	
City :	
Country :UNITED STATES OF AMERICA	
Investment Nature:Various	
Investment Sector:STRATEGIC TECHNOLOGIES	
Event Cooperants :	
Estimated Budget : \$0.00	
Total estimated budget for all proposals: \$10,000.00	

DEPARTMENT OF EXTERNAL AFFAIRS

PEMD - Proposed Government Promotional Activities 1990/91

Proposals As Of December 23/89

Post: Cleveland

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Contact</u>
90/04/00	Oklahoma Farm Show Oklahoma Info Booth	Agri & Food Products & Services
90/06/00	Solo Food Show Cleveland Fair, Solo	Agri & Food Products Plants & Services
90/09/00	Solo Food Show (Wine Event) Cleveland Fair, Solo	Agri & Food Products & Services
90/10/00	Ohio Grocers Association Info Booth	Agri & Food Products

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: DALLAS

Country: UNITED STATES OF AMERICA

Two way trade between Canada and the mission territory, in 1988, was C\$8.5 billion - an annual increase of 21.4 percent. Over that same period, Canadian exports grew 10.4 percent to \$3.2 billion. Major export sectors continued to be: motor vehicle parts; aircraft engines and parts; aluminum including alloys; newsprint paper; softwood lumber; and organic chemicals. Most important in terms of job creation, fully manufactured exports (fabricated materials) increased 15.3 percent comprising 94.7% of the 1988 total. Tourism to Canada from the territory rose an estimated 2 percent from 466,000 to 485,000 visitors with increasing emphasis on Western Canada destinations. Knowledge of and interest in the FTA increased significantly as evidenced by a proliferation of FTA information events throughout the territory.

Texas, with a population of 16.8 million, clearly dominates the territory (total pop. 30.9 million) being the market for 53 percent of territory exports and the source of 68 percent of imports. Like the territory as a whole, the Texas economy is in the midst of a modest recovery with personal income up (9 percent) and non farm employment up (2.9 percent) and unemployment down (6.1 percent) and declining. Similarly, New Mexico (non farm employment up 2.5 percent), Oklahoma (1.7), Louisiana (1.5) and Kansas (1.5) experienced moderate growth. In general, the Southwest is adjusting successfully to a smaller energy industry. Both oil and gas sectors continue to contract and consolidate, however, most signs point towards increased efficiency and vigour. 1988 oil and gas exploration budgets rebounded to the highest levels since (pre-bust) 1985 and "project" spending was the highest in three years. Total gas reserves grew for the first time since 1984 reflecting a widely held belief that gas is not only more plentiful but, ultimately, will be more profitable than oil. On other fronts, the devastated (particularly Texas) banking sector has turned the corner and construction for the first time in five years is, at least, no longer a "brake" on the economy - in fact in Louisiana it has fueled the economic turnaround. Texas continues to be a magnet for corporate relocation (J.C. Penney, GTE, Fujitsu) and high tech expansion (Motorola, IBM). With the assignment to NASA Houston of the management of the Space Station development, Texas NASA spending will increase from \$1.0 billion in 1988 to \$2.5 billion in 1990.

The mission TID sectoral emphasis is little changed from last year within the framework of four primary program thrusts: NEXUS; GSA non defence government sales; defence component sales; and telecommunications/informatics. The major new Technology Inflow Program (TIP) and Investment Development (IDP) programs have been initiated and we are proceeding with the development of computer based tracking and follow-up systems. Progress in both, however, has been delayed by resource constraints. This mission has initiated a new, experimental performing arts program combining the resources and goals of TID and PERPA to treat cultural promotion from a trade promotion perspective. This will be completed and evaluated in FY90/91. We anticipate, as well, joint Social Affairs/TID collaboration in an Entrepreneurial Immigration Promotion program.

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: DALLAS**Country: UNITED STATES OF AMERICA**

collaboration in an Entrepreneurial Immigration Promotion program. Particular emphasis will be given Kansas/Manitoba trade/tourism promotion to exploit the recently concluded "Agreement of Trade Development, Tourism Promotion, and Resource Conservation". Tourism promotion will highlight meetings, conventions and incentives and motor coach travel to take best advantage of the identified Southwest market growth potential. The program has been co-ordinated with Ontario, Quebec and Alberta.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91. EXPORT PROMOTION PRIORITIES

Mission: DALLAS

Country: UNITED STATES OF AMERICA

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

Telecommunication/infomatics is burgeoning in the territory. Texas is now becoming known as the "silicon prairie" and is ranked as the third largest technology products target area in the USA. With the relocation of GTE's headquarters to Dallas and the merger UT/US Sprint in Kansas City, KS the southwest is increasing in importance.

2. DEFENCE PROGRAMS, PRODUCTS, SERV

The southwest region received over \$23 billion in defence contracts. The major USAF ALC's in the territory are Tinker AFB and Kelly AFB both high potential target markets for aerospace and electronic component suppliers. Post initiatives focus on exploiting these and the enormous potential for subcontracting with territory primes.

3. CONSUMER PRODUCTS & SERVICES

The post will focus on a series of NEXUS missions which will target non defence government procurement by GSA Fort Worth. Dallas has become fourth most important focal point for furniture and apparel marketing. Post is developing a three year program of initiatives in these sectors.

4. OIL & GAS EQUIPMENT, SERVICES

The oil and gas industry remains a very significant factor in the southwest and a strong potential market for Canadian manufacturers. The post will maintain a high profile presentation at the Offshore Technology Conference and the Society of Petroleum Engineers through show participation and direct market penetration methods.

5. MULTIPLE SECTORS

Post has targetted a new initiative on the \$1 billion plus annual procurement by the GSA procurement centre in FT. Worth. Specific GSA targets are being determined by a systematic examination of buying patterns. Initial subsectors selected in FY 89/90 were sporting goods and fire fighting equipment. Focus will be expanded in FY 90/91.

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

1. FOREST PRODUCTS, EQUIP, SERVICES
2. ADVANCED TECH. PROD. & SERV
3. CHEM PROD & PETROCHEM, EQP, SERV

4. OIL & GAS EQUIPMENT, SERVICES
5. CONSUMER PRODUCTS & SERVICES
6. AGRI & FOOD PRODUCTS & SERVICE

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DALLAS

Market: UNITED STATES OF AMERICA

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: ELECTRICAL & ELECTRONIC

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	3500.00 \$M	3500.00 \$M	3500.00 \$M	3700.00 \$M
Canadian Exports	105.00 \$M	110.00 \$M	115.00 \$M	120.00 \$M
Canadian Share of Market	3.00 %	3.00 %	3.20 %	3.20 %

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 %
EUROPEAN COMMON MARKET C	15.00 %

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

Products/services for which there are good market prospects:

1. Flight simulator systems.
2. Electronic warfare.
3. Avionics.
4. Telecommunication equipment.

Factors contributing to current successful Canadian exports:

- Import duties are low
- Aggressive marketing
- Trade Fair activity
- 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
- Defence production

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DALLAS

Market: UNITED STATES OF AMERICA

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
 - Small business set
 - aside.
 - Defence marketing awareness.
 -
-

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

Activity: Deltec'90 trade show to promote defence component and electronic suppliers from Canada.

Expected Results: Exhibit 60 Canadian suppliers at the show.

Activity: Defence database upgrade of major US primes in the post territory.

Expected Results: Establish a 1,000 company computerized database.

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

Activity: Defence Mission - Incoming (Apr/90).
Electronic components and systems.

Expected Results: generate 10 RFQ's and \$5 million in subcontracts over 3 yrs.

Activity: Midcom'90 - Dallas, TX (Sept/90) - Information booth.
Electronic components.

Expected Results: Represent 30 Cdn. suppliers and generate \$3 million in sales

Activity: Deltec'91 - Dallas, TX. (Feb/90). - Information booth and Pemd support to 60 companies.

Expected Results: Generate \$10 million in subcontracts to US primes.

Activity: Defence mission - Incoming (Oct/90) - Vancouver, BC.
Telecommunication/space sensing equipment.

Expected Results: Bring 6 major US primes to attend telecom show.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DALLAS

Market: UNITED STATES OF AMERICA

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: AEROSPACE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1800.00 \$M	1500.00 \$M	1500.00 \$M	1500.00 \$M
Canadian Exports	70.00 \$M	72.00 \$M	75.00 \$M	77.00 \$M
Canadian Share of Market	1.00 %	0.50 %	0.50 %	0.50 %

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 %
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 Repair and Overhaul.
2. Engines Components.
3. Structural Airframe Components.
4. Missile Components.

Factors contributing to current successful Canadian exports:

- Import duties are low
- Aggressive marketing
- Provincial export promotion
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- Bilateral economic trade agreement
- Competitive Canadian financing
- Willingness of exporters to invest/joint venture in territory
- Cdn. defence suppliers
- U.S. defence marketing.
- need more education on

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DALLAS

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored
- US Small Business
- Set Asides
- Lack of defence marketing know how.
- Defence marketing experience.

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

- Activity: AIAC Mission (Outgoing)
Expected Results: Generate 5 sales contracts worth \$2 million over 2 years.
- Activity: Establish ongoing cooperation with FADI and CCC in developing this market segment.
Expected Results: Generate 10 RFQ's from the CCC bidder's mailing list.
- Activity: ALC Command Briefings to raise the U.S. awareness of Cdn. defence industrial base and the role of the CCC.
Expected Results: Generate 10 new ALC bids for Canadian suppliers.

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

- Activity: National Business Aircraft Show (NBAA) - Dallas, TX. (Oct10/90) - Pending report from Atlanta recommend info booth.
Expected Results: Represent 30 Canadian companies in the booth.
- Activity: Four(in)and two(out)defence missions to Canada covering the cities of Montreal, Toronto, Vancouver, Halifax and Calgary.
Expected Results: Establish 30 buying connections and \$5 million in sales.
- Activity: One outgoing defence mission to Tinker/Kelly AFB to source new subcontracts for Canadian suppliers (Feb/90).
Expected Results: Establish 15 contract leads and \$3 million in sales.
- Activity: Subcontractor 4 Conference - Toronto, Ont. (Mar91)
Expected Results: Recruit 6 US primes and generate \$2 million in subcontracts.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DALLAS

Market: UNITED STATES OF AMERICA

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	1800.00 \$M	1900.00 \$M	2000.00 \$M	2100.00 \$M
Canadian Exports	190.00 \$M	195.00 \$M	197.00 \$M	200.00 \$M
Canadian Share of Market	10.50 %	10.20 %	9.80 %	9.50 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	60.00 %
JAPAN	20.00 %
CANADA	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. Digital switching equipment.
2. Modems.
3. Fault tolerant communication devices.
4. FDDI transmission equipment.
5. Computer/data interface network software/equipment
6. Radio/cellular telephone equipment.
7. Remote sensing application software and 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
- 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
- Canada is a leader in the
- equipment development.
- development of telecom

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DALLAS

Market: UNITED STATES OF AMERICA

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
 - Keeping up with technology.
 -
-

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

- Activity: Computer database upgrade on post territory telecom contacts.
Expected Results: Create a 500 company computerized database of local contacts
- Activity: Nata/Unicom'90. - National stand representing 25 Cdn. telecom companies follow-up report.
Expected Results: Generate \$5 million in direct telecom equipment sales.

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

- Activity: Unicom/Nata - Houston, TX (Oct/90).
Telecommunication systems and equipment.
Expected Results: Generate \$5 million in direct telecom equipment sales.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DALLAS

Market: UNITED STATES OF AMERICA

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	1900.00 \$M	2000.00 \$M	2200.00 \$M
Canadian Exports	50.00 \$M	55.00 \$M	6.00 \$M	65.00 \$M
Canadian Share of Market	2.00 %	2.00 %	2.00 %	3.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	60.00 %
JAPAN	15.00 %
EUROPEAN COMMON MARKET C	10.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. Computer peripherals
2. Application software.
3. Digital systems and services.
4. Network systems and software.

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
- Strong sectoral capability in Canada
- Bilateral economic trade agreement
- Willingness of exporters to invest/joint venture in territory
- Free Trade Agreement.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DALLAS

Market: UNITED STATES OF AMERICA

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: Computerized database upgrade of local contacts.
Expected Results: Create a 1,000 company database of local contacts.

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

Activity: Kansas/Manitoba mission to Dallas, TX. (June/90).
Expected Results: Generate \$1 million in sales for Manitoba companies.

Activity: Networld'90 - Houston, TX (Sept/90) - National stand.
Computer peripherals and systems.
Expected Results: Generate \$3 million in new sales.

Activity: Deltec'91 - Dallas, TX. (Feb/91)
Expected Results: Exhibit 60 Cdn. companies and generate \$5 million in sales.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DALLAS

Market: UNITED STATES OF AMERICA

Sector : TRANSPORT SYS, EQUIP, COMP, SERV.

Sub-Sector: MARINE INDUSTRIES

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	50.00 \$M	60.00 \$M	65.00 \$M	70.00 \$M
Canadian Exports	20.00 \$M	22.00 \$M	25.00 \$M	26.00 \$M
Canadian Share of Market	40.00 %	36.00 %	38.00 %	37.00 %

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

Major Competing Countries

Market Share

JAPAN	20.00 %
TAIWAN	20.00 %
KOREA	20.00 %

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

Products/services for which there are good market prospects:

1. Drilling equipment.
2. Rescue boats.
3. Equipment and parts for floating drill rigs.
4. Ship controls.
5. Dynamic positioning.
6. Propulsion 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
- Strong sectoral capability in Canada
- Bilateral economic trade agreement
- Competitive Canadian financing
- Willingness of exporters to invest/joint venture in territory

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DALLAS

Market: UNITED STATES OF AMERICA

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

- _____
- _____

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

Activity: Offshore Technology Conference.
Expected Results: Expand Cdn. participation to 50 companies and \$10 mil. sales

Activity: Work Boat Show.
Expected Results: Recruit 25 Cdn. participants and generate \$5 mil. in sales.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DALLAS

Market: UNITED STATES OF AMERICA

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	1700.00 \$M	1750.00 \$M	1800.00 \$M	1850.00 \$M
Canadian Exports	137.00 \$M	140.00 \$M	145.00 \$M	146.00 \$M
Canadian Share of Market	8.00 %	8.00 %	8.00 %	7.80 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	60.00 %
JAPAN	45.00 %
GERMANY WEST	15.00 %
UNITED KINGDOM	10.00 %
BELGIUM	6.00 %
KOREA	4.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. Equipment, Parts and machinery.

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DALLAS

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
 - Limited appreciation/understanding of distribution system
 - Market prospects have not been adequately explored
 - Non tariff barriers.
 -
-

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

- Activity: Offshore Technology Conference - Houston - (May/90)
National stand.
- Expected Results: Maintain a Cdn. presence of 35 companies and \$10 mil. sales.
- Activity: Society of Petroleum Engineers - New Orleans (Sept/90)
National stand.
- Expected Results: Represent 20 Cdn. companies and generate \$3 million in sales
- Activity: Instrument Society of America - New Orleans (Oct/90).
Information booth.
- Expected Results: Generate 100 new leads and \$2 million in sales.
- Activity: Southwest Electrical Exposition
Information booth.
- Expected Results: Generate \$2 million in direct sales.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DALLAS

Market: UNITED STATES OF AMERICA

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	9500.00 \$M	10000.00 \$M	12000.00 \$M	15000.00 \$M
Canadian Exports	475.00 \$M	500.00 \$M	600.00 \$M	750.00 \$M
Canadian Share of Market	5.00 %	5.00 %	5.00 %	5.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	60.00 %
EUROPEAN COMMON MARKET C	20.00 %
HONG KONG	10.00 %
KOREA	5.00 %
TAIWAN	5.00 %

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

Products/services for which there are good market prospects:

1. Medium to high end clothing.
2. Designer items.
3. Pret-a-porter.
4. Leathers and suedes.
5. Furs.

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
- Strong sectoral capability in Canada
- Bilateral economic trade agreement

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DALLAS

Market: UNITED STATES OF AMERICA

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
 - Market intelligence.
-

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

Activity: Leather Mark - Toronto - (Feb/90)
Expected Results: Generate \$500,000 in direct sales.

Activity: Canadian International Womanswear Show - Montreal (Mar/90)
Expected Results: Generate \$1 million in direct sales.

Activity: Apparel Nexus Mission - (Mar/91)
Expected Results: generate \$1 million in direct sales.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DALLAS

Market: UNITED STATES OF AMERICA

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: CULTURE INDUSTRIES

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	3.00 \$M	3.10 \$M	3.20 \$M	3.30 \$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: 0-1 \$M

Major Competing Countries

Market Share

UNITED STATES OF AMERICA
EUROPEAN COMMON MARKET C

98.00 %
2.00 %

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

Products/services for which there are good market prospects:

1. Performing arts.
2. Dance.
3. Classical music.
4. Musical variety.
5. Children's theatre.

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
 - Limited appreciation/understanding of distribution system
 - Market prospects have not been adequately explored
 - New market.
-

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DALLAS

Market: UNITED STATES OF AMERICA

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

Activity: Program of incoming missions to performing arts festivals in Canada by the Mid-America Arts Alliance.
Expected Results: Generate 10 roster companies on MAA roster over 5 years.

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

Activity: MAAA Mission to the Dumaaurier World Stage Festival - Toronto (May/90).

Expected Results: One roster company.

Activity: MAAA Mission to the Winnipeg Folk Festival (July/90).

Expected Results: One roster company.

Activity: MAAA Mission to the New Music America Festival - Montreal (Nov/90).

Expected Results: One roster company.

Activity: MAAA Mission to CINAR Montreal (Dec/90).

Expected Results: One roster company.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DALLAS

Market: UNITED STATES OF AMERICA

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	900.00 \$M	1100.00 \$M	1530.00 \$M	1753.00 \$M
Canadian Exports	108.00 \$M	143.00 \$M	215.00 \$M	262.00 \$M
Canadian Share of Market	12.00 %	13.00 %	14.00 %	15.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	52.00 %
JAPAN	30.00 %
CANADA	12.00 %
EUROPEAN COMMON MARKET C	6.00 %

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

Products/services for which there are good market prospects:

1. Swimwear.
2. Tennis equipment and accessories.
3. Bicycles and equipment.
4. Universal gym equipment.
5. Bowling equipment.
6. Billiards.
7. Basketball.
8. Football.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DALLAS

Market: UNITED STATES OF AMERICA

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
- Strong sectoral capability in Canada
- Bilateral economic trade agreement
- Quality and design of

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
 - More product visibility.
-

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

Activity: GSA Sporting Goods Mission (June/89).
Expected Results: Generate \$2 million in direct sales.

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

Activity: National Spa & Pool Institute - Nov/91.
Expected Results: Generate \$2 million in direct sales.

Activity: Outgoing GSA Mission (June/90)
Expected Results: Generate \$2 million in direct sales.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DALLAS

Market: UNITED STATES OF AMERICA

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: FURNITURE & APPLIANCES

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	182.00 \$M	210.00 \$M	252.00 \$M	294.00 \$M
Canadian Exports	55.00 \$M	57.00 \$M	63.00 \$M	58.00 \$M
Canadian Share of Market	30.00 %	27.00 %	25.00 %	19.00 %

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

Major Competing Countries

Market Share

EUROPE	40.00 %
UNITED STATES OF AMERICA	30.00 %
TAIWAN	20.00 %

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

Products/services for which there are good market prospects:

1. Non residential (office and contract).
2. Residential upholstery (medium and high end).
3. Residential case goods (living, dining, bedroom).

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
- Strong sectoral capability in Canada
- Bilateral economic trade agreement

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DALLAS

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
 - Unsuitable product
 - Limited appreciation/understanding of distribution system
 - Market prospects have not been adequately explored
 - Market intelligence.
-

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

Activity: IIDEX'89 (International Interior Design Exhibition)
US buyers mission.
Expected Results: Generate \$15 million in direct sales.

Activity: Toronto Furniture Market - Jan. 14-17/90.
US buyers mission.
Expected Results: Generate \$500,000 in direct sales.

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

Activity: Montreal Furniture Show - June 17-20/90.
Expected Results: Generate \$2 million in direct sales.

Activity: Nexus mission - Home Furnishing Market - July/90.
Expected Results: Generate \$10 million in direct sales.

Activity: Toronto Furniture Market - Jan/91.
US buyers mission.
Expected Results: Generate \$750,000 in direct sales.

Activity: Two GSA/NEXUS missions covering sporting goods and fire fighting equipment.
Expected Results: Generate \$1 million in direct sales.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DALLAS

Market: UNITED STATES OF AMERICA

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	2500.00 \$M	3100.00 \$M	3500.00 \$M	3800.00 \$M
Canadian Exports	82.00 \$M	90.00 \$M	100.00 \$M	110.00 \$M
Canadian Share of Market	0.03 %	0.03 %	0.02 %	0.02 %

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

Major Competing Countries

Market Share

SWITZERLAND	4.00 %
GERMANY WEST	2.00 %
EUROPEAN COMMON MARKET C	2.00 %
CANADA	3.00 %
JAPAN	3.00 %
UNITED KINGDOM	1.00 %

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

Products/services for which there are good market prospects:

1. Genetic engineering.
2. Extended care.
3. Pharmaceuticals.
4. AIDS research.
5. Medical/surgical equipment.
6. Cardiological research.
7. Cancer research.

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
- 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: DALLAS

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- 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: Canbiocon, Ottawa, September 19-20/89.

Expected Results: Collaborative research and tech transfer with US med. school

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

Activity: American Health Care Association Show, Oct.23-25/89.

Expected Results: Cdn. provincial and company representation across Canada.

Activity: American society for Microbiologists, (June/90)

Expected Results: Generate \$1 million in sales of medical equipment.

Activity: Association of Operating Room Nurses (mar/90)

Expected Results: Generate \$1 million in Cdn. sales to the area hospitals.

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: DALLAS

Country: UNITED STATES OF AMERICA

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
Two years ago	200.00	25.00	40.00
One year ago	220.00	30.00	45.00
Current year	260.00	30.00	45.00

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:

It is estimated that Canada will receive an above average share of US investment from the post territory. The upswing in the oil and gas sector as well as the real estate market provide new sources for investment into Canada.

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

- EEC.
- Mexico.
- Japan.
- Indonesia.

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

- General investment analysis and promotion particularly in the oil and gas related businesses and services. Extensive promotion on the part of EEC member countries with respect to the 1992 and beyond EEC environment.

IDP Partners and related program activities:

Microelectronic Corporation (MCC)

- MCC has, as a result of the FTA, opened its membership to Canada (only) companies and organizations.

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: DALLAS

Country: UNITED STATES OF AMERICA

IDP Partners and related activities cont d:

Sematech

- Sematech may invest into Canada as part of joint technology transfer opportunities between Canada and the US.

Kansas Department of Commerce

- Kansas/Manitoba agreement on trade, investment and tourism will generate specific Manitoba investment initiatives.

Optic Electronic Corp.

- Pursuing Canadian investment as part of offset commitments.

Compaq Computer Corporation

- Compaq has expressed interest in working with Canadian suppliers which may lead to direct investment into Canada.

Electrospace Corp.

- Pursuing Canadian investment as part of offset commitments.

UTL Corp.

- Pursuing Canadian investment as part of offset commitments.

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

- With the FTA transfer of personnel is no longer an issue.
- With FTA continental market access from Canada is becoming a reality making location in Canada to take advantage of economies in production more feasible.
- With progressive implementation of FTA intra Canada trade will be become less fettered.
- Better healthcare system and social conditions particularly public safety are receiving widespread publicity as a result of FTA.
- More stable environment with less international vulnerability.

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: DALLAS

Country: UNITED STATES OF AMERICA

the following constraints:

- Canadian corporate and personal taxation is perceived to be higher and less flexible.
- Relatively small and restricted market size.
- Transborder regulations between provinces.
- Climate and social system perceived to be an obstacle.
- Perception of significantly more government interference and control in the economy.

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	HIGH
Technology Licensing	HIGH

The mission believes that the following sectors are of greatest interest to investors in its territory/country an assigned ranking A = High B = Medium C = Low

Sector	Ranking
Agriculture/Food/Fish	B
Resource Processing	A
Machinery and Equipment	B
Transportation	A
Consumer Products	B
Commercial Service	A
Computer and Communications	A
Health Care Products/Medical	B
Aerospace and Defence	B
Strategic Technologies	A

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: DALLAS

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

Seq #

Date

Type: INFO BOOTH, WITH GROUP

- 1 Event Description: 05/90
 Offshore Technology Conference - targeted mailing to major participants.
 City :Houston, TX.
 Country :UNITED STATES OF AMERICA
 Investment Nature:Strategic Part.
 Joint Venturing
 Greenfield
 Investment Sector:MACHINERY/EQUIPMENT
 Event Cooperants :
 Gov't of Alberta, Nfld., Ont.
 Estimated Budget : \$2,500.00

Type: INFO BOOTH, ONLY

- 3 Event Description: 02/91
 Deltec'91 - high tech defence components trade show.
 City :Dallas, TX.
 Country :UNITED STATES OF AMERICA
 Investment Nature:Strategic Part.
 Joint Venturing
 Tech. Licencing
 Investment Sector:AREOSPACE/DEFENCE
 Event Cooperants :
 Ontario and Quebec.
 Estimated Budget : \$3,500.00

Type: ENTREPRENURIAL SEMINAR

- 5 Event Description: 09/90
 Targeted at Kansas manufacturers in the context of the
 Manitoba/Kansas agreement on trade, investment and tourism.
 City :Wichita, KS.
 Country :UNITED STATES OF AMERICA
 Investment Nature:Strategic Part.
 Joint Venturing
 Greenfield
 Investment Sector:MACHINERY/EQUIPMENT
 Event Cooperants :
 Government of Manitoba, Kansas Department of Commerce,
 Kansas Chamber of Commerce.
 Estimated Budget : \$4,500.00

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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: DALLAS

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

Seq #

Date

Type: DIRECT MAIL CAMPAIGN

4 Event Description:

10/90

Selected mailing to hightech/infomatics/telecom/computer companies custom purchased mailing lists.

City :Hstn/Austin/Dal/SanA

Country :UNITED STATES OF AMERICA

Investment Nature:Greenfield

Joint Venturing

Tech. Licencing

Investment Sector:COMPUTER/COMMUNICATIONS

Event Cooperants :

Estimated Budget : \$4,000.00

Total estimated budget for all proposals: \$14,500.00

DEPARTMENT OF EXTERNAL AFFAIRS

PEMD - Proposed Government Promotional Activities 1990/91

Proposals As Of December 23/89

Post: Dallas

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Contact</u>
90/05/00	Offshore Technology Conference Houston Fair National Stand	Oil & Gas Equipment & Services
90/05/14	Interface 91 Dallas Fair, National Stand	Advanced Tech. Products & Services
90/06/00	American Buyers To Western Canada Farm Progress Show Mission In, To Fair	Agri & Food Products & Services
90/09/11	NETWORLD Dallas Fair, National Stand	Advanced Tech. Prod & Services
90/12/04	UNICOM - Dallas Fair, National Stand	Advanced Tech. Prod & Services

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: DETROIT

Country: UNITED STATES OF AMERICA

The Post territory (Mich, Indiana, city of Toledo) continued in 1988 its established (and frequently overlooked) tradition as Canada's largest market, after the USA as a whole: the destination for more than 25% (\$27 billion) of Canada's merchandise trade with the USA (\$98 billion) & therefore, the buyer of record of about 1 in 6 of every dollar Canada exports globally. One sector, automotive, accounts for about 80% of that amount reflecting 25 years of "Free Trade". The experience of the Auto Pact will provide a benchmark against which trade performance under the FTA for all industry sectors will be measured. FTA implementation has been a top priority of this Post and will continue thusly in 1990 through FY 90/91.

The 1989 automotive model year was the 5th best historically in sales but as industry observers will note was not celebrated but regarded uneasily. Many sales were said to be recorded through generous "incentives" particularly the use of "rebates" and "cut-rate financing". Moreover, as the North American industry continues to add total capacity (via Japanese transplant building-up production rapidly), the battle in the dealer showrooms is expected to heat up even more. Consequently, unit production and sales we expect to be about the same in 1990 as in 1989 though industry profits are expected to see further drops. Beyond 1990 we expect the overcapacity issue to become irresistible and that there will be a need for some plant closings in which Canada must expect to share.

The automotive industry continues therefore the change that began the mid-80's though by now all the players including the "Big Three" are leaner and meaner with better quality products. How change and readjustment in the auto industry continues into the 1990's and its concomitant effect on Canada constitutes the dominant challenge in our trade and economic work program. Certainly we will continue with our Canadian industry counterparts, and moreso we hope with our counterparts in Ottawa, to develop, promote and implement an adequate OEM automotive trade strategy and program.

A critical element in the foregoing strategy is the opening of a satellite office in Indianapolis. Indiana with 2-way trade of \$5.4 billion (almost 2:1 in favour of Indiana) is a bigger trade partner for us than Texas and most other states that already have satellite offices. As home to ten Fortune 500 companies including leaders in the pharmaceutical / biotechnology / agribusiness sectors, we must quickly open so as to more appropriately fulfill our trade responsibilities across all sectors including automotive related.

If "technology" were an industry sector that would be our second priority after automotive. The two in fact go together as the auto industry supports a vast amount of industrial research and development, making Michigan the second leading state in per capita R+D spending. Greater Detroit's "Automation Alley", home to about 400 manufacturing technology firms, with \$5 billion in sales, & 35,000 workers is considered the fastest growing high tech center in the USA. The focus of the technology is manufacturing processes & as GM alone buys 40% of all industrial robots made today it is not surprising that there are more than 60 robotics companies in the region including 9 of the 10 largest in the USA. We will be proposing through missions and trade show participation to have

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: DETROIT

Country: UNITED STATES OF AMERICA

Canada's manufacturing and high tech industries more cognizant of the commercially available technology in our territory.

Other priority sectors in our territory (whose GDP exceeds that of Ontario's) will be agriculture, defence products and tourism. Initial promotional activities in the food and grocery sectors have been successful and considering the proximity to Canada's like supplier industry to this, the fifth largest metropolitan market in the USA and the one closest to our industrial heartland, the potential remains enormous. Tourism likewise can grow but only if it continues to be promoted. The demographics and proximity to Canada are favourable to tourism promotion. We are concerned that Canadian prices (exchange rate) transportation alternatives (Via Rail cutbacks, Highway 401 congestion, airfare routes and costs), and stagnant promotion budgets all will contribute to a deterioration of our tourism trade balance as other destinations (Caribbean, Mexico, Florida, Las Vegas, etc) successfully compete for the tourist's dollars. The defence sector will, with its close relationship in our territory to the automotive industry and the high tech/R+D programs, continue to be a priority. Our satellite office at TACOM was successful in assisting a small Quebec based firm to win the largest (\$52 million) military prime contract awarded to Canada in 1989 and we continue to identify other major procurement opportunities for Canadian firms. Additionally, our Post has initiated activities in sectors new to us such as construction, building materials, lumber, furniture and fashion, all of which have shown immediate return. We would hope to continue these and indeed expand on them into other such activities like retail/department stores, food distribution, franchising, sporting and recreational goods, however, our personnel resources are fully exhausted and they could only be undertaken if resources were to be provided which would allow for much of the associated work to be contracted out or done by employing temporary help.

To conclude, Michigan represents a major continuing market of opportunity for Canada's export community as evidenced by its having four of the past five years led the USA in manufacturing investment.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 EXPORT PROMOTION PRIORITIES

Mission: DETROIT

Country: UNITED STATES OF AMERICA

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.**
Market potential approximately 120 billion. Autopact and FTA facilitate access for Canadian suppliers.
2. **ADVANCED TECH. PROD. & SERV**
"The Economist" (U.K. business magazine has called S.E. Michigan "the fastest growing high tech region in the United States, if not the world". Ten of the 11 largest industrial robot manufacturers are located in our territory.
3. **INDUSTRIAL MACHIN, PLANTS, SERV.**
S.E. Michigan has over 330 advanced manufacturing technology companies with 33,000 plus employees and over \$5 billion in sales, 60% is automotive related manufacturing.
4. **AGRI & FOOD PRODUCTS & SERVICE**
Agriculture and food processing: institutional and retail food sales are in excess of \$3 billion. In Michigan there are opportunities which exist for processed food, food service equipment and wine.
5. **DEFENCE PROGRAMS, PRODUCTS, SERV**
This territory includes three military installations which have purchasing and research and development mandates with combined annual procurement budgets in excess of U.S. \$5 billion. The market is highly competitive but many solicitations are repeated. Opportunities also exist for sub-contracting to U.S. primes.
6. **CONSUMER PRODUCTS & SERVICES**
Economy in Post territory remains stable with consumer confidence still high. We project a growth in the Consumer Goods sector.

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

- | | |
|--------------------------------------|-------------------------------------|
| 1. TRANSPORT SYS, EQUIP, COMP, SERV. | 4. AGRI & FOOD PRODUCTS & SERVICE |
| 2. OIL & GAS EQUIPMENT, SERVICES | 5. DEFENCE PROGRAMS, PRODUCTS, SERV |
| 3. FOREST PRODUCTS, EQUIP, SERVICES | 6. INDUSTRIAL MACHIN, PLANTS, SERV. |

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DETROIT

Market: UNITED STATES OF AMERICA

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	0.00 \$M	3000.00 \$M	0.00 \$M	0.00 \$M
Canadian Exports	320.00 \$M	350.00 \$M	350.00 \$M	0.00 \$M
Canadian Share of Market	10.00 %	10.00 %	10.00 %	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	85.00 %
OTHER COUNTRIES	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. Processed Food
2. Food Service Equipment
3. Fish and Seafood
4. Specialty Foods
5. Wine

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
- Strong sectoral capability in Canada

Factors for Canadian exports not reaching market potential:

- _____
- _____

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DETROIT

Market: UNITED STATES OF AMERICA

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

Activity: A Taste of Cdn Wine Promotion targeting distributors, brokers and wine influencers

Expected Results: Create awareness of Cdn wine in terr and appoint 3 new dist.

Activity: Solo Food Show, Detroit

Expected Results: Enhance profile of processed food and introduce new products

Activity: Informal presentation of food products to agents, brokers, distributors and grocery buyers hotel and restaurant owners.

Expected Results: Introduction of seven new products to territory.

Activity: Solo Food Show, Indianapolis

Expected Results: Increase awareness of Cdn processed food products in Indiana

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

Activity: Michigan and Great Lakes Food Service Show

Expected Results: Enhanced profile of Cdn Processed Food & Food Serv. Equip.

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

Activity: Solo Food Show, Indianapolis

Expected Results: Introduce Cdn procsd food to brokers, agents & distr in IN.

Activity: Explore Agriculture industry in Michigan through market profile report.

Expected Results: Uncover opportunities in new & growing indstry for Cdn cos.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DETROIT

Market: UNITED STATES OF AMERICA

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

N/A

Approximate Value: 0 M\$
Financing Source :
Contact : Michael Rooney, 313-567-2340

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DETROIT

Market: UNITED STATES OF AMERICA

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	5000.00 \$M	5000.00 \$M	5000.00 \$M	5000.00 \$M
Canadian Exports	110.00 \$M	110.00 \$M	100.00 \$M	105.00 \$M
Canadian Share of Market	2.20 %	2.20 %	2.00 %	2.10 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	95.00 %
EUROPEAN COMMON MARKET C	2.00 %
ISRAEL	1.00 %

Current Status of Canadian

exports in this sector/subsector: Mature with little growth

Products/services for which there are good market prospects:

1. Automotive Parts
2. Armoured Vehicles
3. Specialized Trailers
4. Electronic Components
5. Avionics Equipment
6. Sonobuoys
7. Vehicle Heaters
8. Armour Plate
9. Pneumatic Tire
10. Road Wheels/Tracks
11. Remote Piloted Vehicles
12. Bomb Racks

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
- Bilateral economic trade agreement
- Willingness of exporters to invest/joint venture in territory

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DETROIT

Market: UNITED STATES OF AMERICA

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: Continue to identify/cultivate key contacts at U.S. prime & subcontractors in the defence industry sector.
Expected Results: Increased subcontracting opportunities for Cdn companies
- Activity: Through TACOM DDSA working group and contacts at NAC and NWSC identify and recommend potential development projects.
Expected Results: Opportunities for Cdn participation in U.S. R & D projects.
- Activity: Work with Competition Advocates at TACOM, NAC and NWSC to increase awareness of DD/DPSA & Cdn industrial capabilities.
Expected Results: Additional sales opportunities.
- Activity: Exhibit Cdn defence products/technologies regularly at TACOM through cooperation of Foreign Intelligence Div.
Expected Results: Increased awareness of Cdn products & capabilities.

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

- Activity: Naval Avionics Center Briefing at AIAC Annual Meeting, Sept '90.
Expected Results: Increased awareness of export opportunities with NAC.
- Activity: Outgoing mission of Cdn companies from High Technology Aerospace/Naval/Avionics Sectors to NAC, March '91
Expected Results: Increased awareness of Cdn products and capabilities.
- Activity: Regular visits to Cdn defence contractors and potential defence contractors.
Expected Results: Increased awareness of potential in defence sector in terr.
- Activity: Defence Product Seminars - Michigan and Indiana
Expected Results: Increased awareness of Cdn products and capabilities.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DETROIT

Market: UNITED STATES OF AMERICA

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

Family of Medium Tactical
Vehicles (Subcontracting)

Approximate Value: 200 M\$
Financing Source : DOM - Domestically funded
Contact : G.S. Boyington 313-567-2340
313-574-5233

M1A1 Abrams Main Battle Tank
(Subcontracting)

Approximate Value: 5000 M\$
Financing Source : DOM - Domestically funded
Contact : G.S. Boyington 313-567-2340
313-574-5233

Light and Heavy Tactical
Vehicles

Approximate Value: 1000 M\$
Financing Source : DOM - Domestically funded
Contact : G.S. Boyington 313-567-2340
313-574-5233

M1A1 Abrams MBT Block
Improvements

Approximate Value: 1000 M\$
Financing Source : DOM - Domestically funded
Contact : G.S. Boyington 313-567-2340
313-574-5233

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DETROIT

Market: UNITED STATES OF AMERICA

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	2775.00 \$M	2800.00 \$M	2780.00 \$M	2780.00 \$M
Canadian Exports	62.45 \$M	600.00 \$M	600.00 \$M	610.00 \$M
Canadian Share of Market	2.30 %	2.20 %	2.20 %	2.10 %

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

Major Competing Countries

Market Share

JAPAN	50.00 %
UNITED STATES OF AMERICA	15.00 %
TAIWAN	10.00 %
KOREA	7.00 %
EUROPE	4.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. Office Automation
2. Networking Products
3. Electronic Components
4. Printed Circuit Boards
5. Applications Software (niche)
6. Robotics/A.I.
7. Process Control (Mfg.)
8. Remote Sensing Products
9. Telecommunication 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
- Trade Fair activity
- Competitive pricing
- Willingness of exporters to invest/joint venture in territory

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DETROIT

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Limited Canadian capabilities
- Market prospects have not been adequately explored
- Geographical location
- Cost of Purchs'd goods & raw mtl

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

Activity: Finalize an agreement between Robotics Ind. Assoc & Cdn. equivalent.

Expected Results: Tech. data sharing and standards implementation.

Activity: On-going search for lines of distribution and potential end-users for client base.

Expected Results: Two million in sales to result.

Activity: Address state Chapters of Electronics Reps Assoc. (Michigan & Indiana)

Expected Results: Find additional qualified lines of distribution.

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

Activity: Robotics/Vision Trade Show, June '90.

Expected Results: Five Cdn partners to co-exhibit. 1-5 million in sales.

Activity: Autofact '90, November

Expected Results: Five Cdn partners to co-exhibit. One million in sales.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DETROIT

Market: UNITED STATES OF AMERICA

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

Activity: Assess feasibility and implement an outgoing mission to Unisys, Detroit.

Expected Results: One to two million in sales and numerous buying connections.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DETROIT

Market: UNITED STATES OF AMERICA

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	170000.00 \$M	161000.00 \$M	160000.00 \$M	160000.00 \$M
Canadian Exports	21200.00 \$M	21300.00 \$M	21300.00 \$M	21300.00 \$M
Canadian Share of Market	12.50 %	13.20 %	13.30 %	13.30 %

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

Major Competing Countries

Market Share

JAPAN	27.60 %
UNITED STATES OF AMERICA	49.00 %
WEST EUROPE	6.00 %
KOREA	2.00 %
OTHER COUNTRIES	2.00 %

Current Status of Canadian

exports in this sector/subsector: Mature with little growth

Products/services for which there are good market prospects:

1. Auto Parts
2. Engine Components
3. Automobiles (cars)
4. Trucks

Factors contributing to current successful Canadian exports:

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DETROIT

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing

- _____

- _____

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

Activity: Extensive promotional involvement at SAE Show (major booth).
Expected Results: Promote Canadian technology capabilities & parts production.

Activity: Major seminar function during SAE week.
Expected Results: Promote "buying connection" between Canadian/U.S. 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: Close liaison with APMA of Canada as a result of Annual APMA Director's Meeting held in Detroit.

Expected Results: Promote marketing efforts and importance of U.S. market.

Activity: Enhance relations between senior government officials and auto companies in territory.

Expected Results: Better understanding of U.S. industry concerns.

Activity: Monitoring flow of auto parts exports through border entry ports, i.e. customs problems/interpretations.

Expected Results: Ensure unimpeded flow of auto parts to Canada.

Activity: Liaison with University of Michigan, Dept. of Transport.

Expected Results: Build working relationship & share a Canadian perspective.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DETROIT

Market: UNITED STATES OF AMERICA

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

North American Tier Suppliers	Approximate Value:	0 M\$
to the Big Three.	Financing Source :	
	Contact	: R.P. Robertson, 313-567-2340

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DETROIT

Market: UNITED STATES OF AMERICA

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	1000.00 \$M	1100.00 \$M	1110.00 \$M	1100.00 \$M
Canadian Exports	464.00 \$M	460.00 \$M	461.00 \$M	460.00 \$M
Canadian Share of Market	40.00 %	40.00 %	40.00 %	40.00 %

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 %
EUROPEAN COMMON MARKET C	5.00 %
SCANDINAVIA	3.00 %
OTHER COUNTRIES	2.00 %

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

Products/services for which there are good market prospects:

1. Dimensioned Wood
2. Re-manufactured Products
3. Veneer

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
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- Bilateral economic trade agreement

Factors for Canadian exports not reaching market potential:

- _____
- _____

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DETROIT

Market: UNITED STATES OF AMERICA

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

Activity: Continue visitation program to local brokers/wholesalers, buying groups and major retailers.

Expected Results: Monitor effect lumber surcharge; new products needs.

Activity: Update of market profile for wood product sector.

Expected Results: Create market identification tool for new exporters.

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

Activity: Lumber and Building Material Expo, Grand Rapids, MI, Jan. '91.

Expected Results: Five new representation agreements.

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

Activity: Post initiated Lumber Seminar.

Expected Results: Raise awareness of local and Cdn lumber interests.

Activity: Michigan Lumber & Building Materials Convention.

Expected Results: Raise awareness of local and Cdn lumber interests.

Activity: Canadian Lumbermen's Convention.

Expected Results: Raise awareness of local and Cdn lumber interests.

Activity: Ontario Lumbermen's Convention.

Expected Results: Raise awareness of local and Cdn lumber interests.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DETROIT

Market: UNITED STATES OF AMERICA

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

Expansion furniture production Approximate Value: 0 M\$
Financing Source : DOM - Domestically funded
Contact : J.P. Lambermont, 313-567-2340

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DETROIT

Market: UNITED STATES OF AMERICA

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	3100.00 \$M	3100.00 \$M	2800.00 \$M	2200.00 \$M
Canadian Exports	1100.00 \$M	1000.00 \$M	13000.00 \$M	7000.00 \$M
Canadian Share of Market	35.40 %	33.00 %	35.00 %	31.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	57.00 %
CANADA	35.00 %
SCANDINAVIA	6.00 %
CENTRAL AMERICA	2.00 %

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

Products/services for which there are good market prospects:

1. Newsprint
2. Pulp
3. Fine paper

Factors contributing to current successful Canadian exports:

- 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
- Proximity to market

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DETROIT

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Restrictive standards
- Recycling requirements
- Recycling leg. will erode sector
- to negligible level in 20 yrs.

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

Activity: Closely monitor impending recycling legislation.
Expected Results: To keep Cdn industry informed.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DETROIT

Market: UNITED STATES OF AMERICA

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

Recycling Program Legislation Approximate Value: 0 M\$
 Financing Source :
 Contact : Bob Lavigne, 313-567-2340

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DETROIT

Market: UNITED STATES OF AMERICA

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	4000.00 \$M	4150.00 \$M	4300.00 \$M	4450.00 \$M
Canadian Exports	54.20 \$M	60.00 \$M	63.00 \$M	65.00 \$M
Canadian Share of Market	12.00 %	14.00 %	15.00 %	15.50 %

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 %
JAPAN	12.00 %
EUROPEAN COMMON MARKET C	4.00 %

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

Products/services for which there are good market prospects:

1. Houseware/Hardware
2. Contract Furniture
3. Leisure Products
4. Residential Furniture
5. Sporting Goods

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
- Strong sectoral capability in Canada

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DETROIT

Market: UNITED STATES OF AMERICA

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: Develop new program for Cdn products. Days with buyers & managers from large territorial retail outlets.
 Expected Results: Inclusion of Cdn producers on lists of qualified suppliers.
- Activity: Promote Cdn sporting goods at Sporting Goods Trade Show in Chicago and National Sporting Goods Assoc. in Tor & Mtl.
 Expected Results: New agency agreements.

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

- Activity: Buyers Missions to IIDEX '90, Toronto
 Expected Results: Introduce new designers/specifiers to Cdn Contract Furn mfrs
- Activity: Buyers Mission to Cdn. Women's Wear Show, 90 and 91, Mtl.
 Expected Results: Increase Cdn market share in medium to high price points.
- Activity: Buyers Missions to Toronto Furniture Show, '91, Toronto.
 Expected Results: Increase market share of higher price Cdn made furniture.
- Activity: Buyers Mission to International Boat Show, '91, Toronto
 Expected Results: Establish new dealer agreements for Cdn made pleasure crafts

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DETROIT

Market: UNITED STATES OF AMERICA

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

Activity: Continue to upgrade contacts in terr in response to increased enquiries as a result of the implementation of FTA.
Expected Results: Increase market penetration.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DETROIT

Market: UNITED STATES OF AMERICA

Sector : CONSTRUCTION INDUSTRY

Sub-Sector: BUILDING PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	6300.00 \$M	5500.00 \$M	5800.00 \$M	5000.00 \$M
Canadian Exports	168.00 \$M	200.00 \$M	211.00 \$M	180.00 \$M
Canadian Share of Market	2.60 %	3.60 %	3.60 %	3.60 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	93.00 %
CANADA	3.60 %
ITALY	2.00 %
OTHER COUNTRIES	1.40 %

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

Products/services for which there are good market prospects:

1. Architecture
2. Specialty Products
3. HVAC
4. Prefab Components

Factors contributing to current successful Canadian exports:

- Import duties are low
- Aggressive marketing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- Bilateral economic trade agreement

Factors for Canadian exports not reaching market potential:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DETROIT

Market: UNITED STATES OF AMERICA

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

Activity: CSI Building Materials
Expected Results: Increase Cdn 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: MHRV Show, Indiana
Expected Results: Increase Cdn market share.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DETROIT

Market: UNITED STATES OF AMERICA

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	7000.00 \$M	7000.00 \$M	6800.00 \$M	6800.00 \$M
Canadian Exports	380.00 \$M	360.00 \$M	350.00 \$M	350.00 \$M
Canadian Share of Market	4.50 %	4.20 %	4.10 %	4.10 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	40.00 %
JAPAN	30.00 %
GERMANY WEST	8.00 %
ITALY	6.00 %

Current Status of Canadian

exports in this sector/subsector: Market share declining

Products/services for which there are good market prospects:

1. C.N.C. Machine Tools
2. Moulds - Plastic Injection & Plastics Forming
3. Special Machinery
4. Castings/Forgings
5. Close tolerance Machining Services
6. Extrusions - Non-Ferrous
7. "Swiss" Screw Machine Capabilities
8. Material Handling Equipment
9. Metalworking Presses
10. Plastics Processing Presses

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
- Strong sectoral capability in Canada

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DETROIT

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Market prospects have not been adequately explored
- Performance of local agent or representative
- Geographical location
- Tax structure

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

Activity: Rep searches for many Cdn firms requesting Post assistance.
Expected Results: 6-8 new agency agreements within FY 89/90 & 12 for FY 90/91.

Activity: Constant canvass of en-user base in terr to provide Post assistance in sourcing Cdn.
Expected Results: Increase awareness of sourcing potential of Cdn expertise.

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

Activity: S.M.E. International Expo called FABTECH International,
May '90
Expected Results: Sourcing and investment opportunities

Activity: APEX Trade Show, September '90
Expected Results: Sourcing and investment 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: Plan formal solo event in conjunction with W.A.M.M.
Expected Results: Increase awareness of plastic (mold-making) expertise in Cda

Activity: Rep locator program
Expected Results: Buying connections and lines of distribution.

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: DETROIT

Country: UNITED STATES OF AMERICA

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:

1.5 - 2.0 billion (estimate only).

N.B.--No stats available by state as to the flows of investments to the countries of investment from Post territory.

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

- Michigan and Indiana
- Bordering States (Ohio, Illinois)
- Sun Belt, Southern states (Kentucky, Tennessee)
- Mexico
- E.E.C.

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

- Media advertising
- Info booths at trade shows
- Incoming and outgoing missions
- Local public action groups

IDP Partners and related program activities:

Major Banks (Cdn & domestic)

- Providing speakers and resource information.

The Big 8 (i.e. Coopers, Peat Marwick, Anderson Clarkson, etc. (Economic Development Commissioners from Canada).

- Providing speakers and resource information.

Provincial Governments.

- Trade show and Seminar Participation.

Business community (Canadian and Foreign).

- Providing speakers (testimonials).

U.S. Dept. of Commerce, Detroit

- Dissemination of info to U.S. industry on "doing business in Cda" stimulating interest in establishing Cdn operations.

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: DETROIT

Country: UNITED STATES OF AMERICA

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

- Quality of life excellent ie. public safety, education, healthcare; FTA elimination of duties allows goods to be attained from the U.S. at a lower cost.
- Ease of access (geographic proximity & minimal border crossing barriers).
- Competitively available resources (energy, hydrocarbons & base materials)

the following constraints:

- Availability of skilled as well as semi-skilled labor within the Metro area of Toronto (nearly 0 unemployment rate in Toronto).
- Impending labour legislation in Ontario ie pay equity, health and safety rules; high price of real estate within 100 mile radius of Toronto.
- Cost of living in southern Ontario very expensive; Impending GST leaves investors in a quandry at this moment;
- Lack of investment incentives in major Ontario areas of investment vs some locations (prime) in the U.S. ie MI, Ohio & Illinois
- Strengthening U.S./Cda dollar relationship of little advantage as it once was a year or so ago;

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	HIGH
Joint Venture	HIGH
Strategic Partnering	HIGH
Technology Licensing	HIGH

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: DETROIT

Country: UNITED STATES OF AMERICA

The mission believes that the following sectors are of greatest interest to investors in its territory/country an assigned ranking A = High B = Medium C = Low

Sector	Ranking
Agriculture/Food/Fish	C
Resource Processing	C
Machinery and Equipment	A
Transportation	A
Consumer Products	B
Commercial Service	A
Computer and Communications	B
Health Care Products/Medical	C
Aerospace and Defence	C
Strategic Technologies	C

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: DETROIT

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

Seq #	Date
Type: INFO BOOTH, WITH GROUP	
7	02/92
Event Description: SAE Info Booth Society of Automotive Engineers at Cobo Hall City :Detroit, MI Country :UNITED STATES OF AMERICA Investment Nature:Joint Venture Investment Sector:TRANSPORTATION Event Cooperants : Economic Development Commissioners in Cda Estimated Budget : \$10,000.00	
8	02/93
Event Description: SAE Info Booth Society of Automotive Engineers City :Detroit, MI Country :UNITED STATES OF AMERICA Investment Nature:Joint Venture Investment Sector:TRANSPORTATION Event Cooperants : Economic Development Commissioners in Cda Estimated Budget : \$10,000.00	
Type: COMMUNICATIONS EXHIBIT	
4	05/90
Event Description: Target Manufacturing Sector City :Detroit, MI Country :UNITED STATES OF AMERICA Investment Nature:Greenfield Acquisition Investment Sector:MACHINERY/EQUIPMENT Event Cooperants : E.D.O.'s & Prov. Govts. Estimated Budget : \$12,000.00	

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: DETROIT

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

Seq #	Date
Type: COMMUNICATIONS EXHIBIT	
3	09/91
Event Description:	
Target Manufacturing Sector	
City	:Grd Rapids
Country	:UNITED STATES OF AMERICA
Investment Nature:	Greenfield Acquisition
Investment Sector:	MACHINERY/EQUIPMENT
Event Cooperants :	E.D.O.'s & Prov. Govts.
Estimated Budget :	\$10,000.00
Type: SEMINAR, ABROAD	
14	07/92
Event Description:	
Manufactured Housing Seminar	
City	:Elkhart
Country	:UNITED STATES OF AMERICA
Investment Nature:	Joint Venture
Investment Sector:	RESOURCE PROCESSING
Event Cooperants :	Associations
Estimated Budget :	\$13,000.00
12	07/90
Event Description:	
Manufactured Housing Seminar	
City	:Elkhart, IN
Country	:UNITED STATES OF AMERICA
Investment Nature:	Joint Venture
Investment Sector:	RESOURCE PROCESSING
Event Cooperants :	Associations
Estimated Budget :	\$13,000.00

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: DETROIT

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

Seq #	Date
Type: SEMINAR, ABROAD	
5	09/90
Event Description: Indianapolis Investment Seminar	
City :Indianapolis	
Country :UNITED STATES OF AMERICA	
Investment Nature:Acquisition	
Investment Sector:COMMERCIAL SERVICE	
Event Cooperants :	
Industries, Associations	
Estimated Budget : \$8,000.00	
6	09/91
Event Description: Detroit Investment Seminar	
City :Detroit, Michigan	
Country :UNITED STATES OF AMERICA	
Investment Nature:Greenfield	
Joint Venture	
Investment Sector:COMMERCIAL SERVICE	
Event Cooperants :	
Industries, Associations	
Estimated Budget : \$8,000.00	
13	07/91
Event Description: Manufactured Housing Seminar	
City :Elkhart, Indiana	
Country :UNITED STATES OF AMERICA	
Investment Nature:Joint Venture	
Investment Sector:RESOURCE PROCESSING	
Event Cooperants :	
Associations	
Estimated Budget : \$13,000.00	
2	03/93
Event Description: Lumber Investment Seminar	
City :Grd Rapids, Michigan	
Country :UNITED STATES OF AMERICA	
Investment Nature:Acquisition	
Investment Sector:RESOURCE PROCESSING	
Event Cooperants :	
Industries, Associations	
Estimated Budget : \$3,500.00	

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: DETROIT

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

Seq #

Date

Type: SEMINAR, ABROAD

- | | | |
|----|--|-------|
| 1 | Event Description:
Lumber Investment Seminar
City :Flint, Michigan
Country :UNITED STATES OF AMERICA
Investment Nature:Acquisition
Investment Sector:RESOURCE PROCESSING
Event Cooperants :
Industries, Associations
Estimated Budget : \$3,500.00 | 03/92 |
| 10 | Event Description:
Manufactured Housing Seminar
City :Indianapolis
Country :UNITED STATES OF AMERICA
Investment Nature:Joint Venture
Investment Sector:RESOURCE PROCESSING
Event Cooperants :
Industries, Associations
Estimated Budget : \$13,000.00 | 07/91 |
| 9 | Event Description:
Manufactured Housing Seminar
City :Indianapolis
Country :UNITED STATES OF AMERICA
Investment Nature:Joint Venture
Investment Sector:RESOURCE PROCESSING
Event Cooperants :
Industries, Associations
Estimated Budget : \$13,000.00 | 07/90 |

Type: SEMINAR, IN CANADA

- | | | |
|----|--|-------|
| 11 | Event Description:
Manufactured Housing Seminar
City :Indianapolis
Country :UNITED STATES OF AMERICA
Investment Nature:Joint Venture
Investment Sector:RESOURCE PROCESSING
Event Cooperants :
Industries, Associations
Estimated Budget : \$13,000.00 | 09/92 |
|----|--|-------|

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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: DETROIT

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

Total estimated budget for all proposals: \$143,000.00

DEPARTMENT OF EXTERNAL AFFAIRS

PEMD - Proposed Government Promotional Activities 1990/91

Proposals As Of December 23/89

Post: Detroit

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Contact</u>
90/04/00	CERAMIC EXPO - Indianapolis Fair National Stand	Mine, Metal, Mineral Prod & Services
90/05/00	Solo Food Show Detroit Fair, Solo	Agri & Food Products & Services

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: LOS ANGELES

Country: UNITED STATES OF AMERICA

Economic prospects in California look as bright as ever. The state is one of the richest and most diversified regions in the world, with a gross national product in 1987 of \$582 billion, to increase to \$1,256 billion in 2010. In the year 2010, California will rank number 6 as a world economic power while Canada will rank number 10. Southern California, representing 60% of California's GNP, will rank number 11 by itself.

Southern California's population is increasing nerally 1000 a day, reaching almost 25 million by 2010. At this time, about 60% of Southern California's population will consist of ethnic minorities, as compared with 45% today. Four out of every ten Southern California will be of Hispanic origin.

Almost 300,000 new jobs are opening up each year, adding 7 million by 2010. Southern California's growth rate is expected to average about 3.5 percent annually in real terms for the foreseeable future, compared to 2.8 percent growth projected for the rest of the U.S. as a whole. Among the fastest growing employment opportunities will be in high-technology, biotechnology, engineering, business services, communications, and personal services.

International business will have an even greater stake in the economy. In the near future, Southern California will overtake New York customs district in trade volume. Foreign investment also will grow rapidly, led by an expanded and integrated world economy.

The city of Los Angeles is becoming more of a financial and multi-national headquarters area for corporations, while outlying areas such as Long Beach, San Diego, Newport Beach, Irvine, and Riverside will attract a growing share of new jobs and small to medium-sized businesses.

Major Canadian exports to California include natural gas (\$1 billion plus), newsprint paper (\$500 million), aircraft parts minus engines (\$485 million), telecommunications equipment (\$165 million), and softwood lumber (\$100 million). Growth can be expected in agricultural and food products, consumer products, rapid transit equipment, and computer equipment and related software.

If all of this sounds a little too good to be true, you're right. There is a steady deterioration in the quality of life in general in California, caused by traffic congestion, industrial pollution, and toxic waste spills. The air, water, and environment generally are suffering. All this leads to more opportunities for creative ways to help Californians manage their environment more effectively, technologies in some cases that Canada has to offer. These include pollution control equipment, toxic waste management, and mass transit equipment that serves our own urban centers so well.

DEFENSE/AEROSPACE/R&D (Outlook 1990/91):

The highly concentrated defence-industrial complex in Southern California will fee the brunt of an expected \$10B cut in military spending. Over the years California-based defense contractors have received roughly 19% of the military procurement & R&D dollars. The 1990/91 forecast of \$79.6 B for procurement and \$39.1B for RDT&E will, combined, translate into a market share of approximately \$22.5B, a decline of about 2.5% in real terms. Program sectors that are expected to hold their own in the budget allocation are space, electronics and communications. Also

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: LOS ANGELES

Country: UNITED STATES OF AMERICA

untouched is NASA's \$14B space station program.

Cuts in military aerospace programs will be compensated to a large extent by shifts to commercial programs. The backlog for commercial aircraft is in excess of \$60B and all elements of the sector are involved: light manufacturing, avionics, composites, forgings and castings, electronics and sub-assemblies. The spare parts program for the current fleet of aircraft will continue to offer opportunities for smaller, qualified firms who are prepared to bid on short-run items. It is in the commercial sector where Canadian companies have had the largest market access and therefore the military aircraft programs that will be trimmed or cut, (i.e. B2, AH-64 attack helicopter, F-15 and F-14) is not expected to impact too severely on Canadian firms that already have an established market niche.

Access to R&D opportunities is seen as an essential element for future market access and as a way of overcoming limited domestic opportunities. This has been recognized in the ISTC Strategic Plan as a priority target for its defense industries. The Post will therefore continue to work in close collaboration with USAF Space Division to identify potential projects to be developed under the U.S.-Canada Defense Development Sharing Agreement. In this regard, critical military technologies, with commercial extensions, offer the best chance of capturing limited R&D funds and consequently will also be the most competitive.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 EXPORT PROMOTION PRIORITIES

Mission: LOS ANGELES

Country: UNITED STATES OF AMERICA

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

1. EDUCATION, MEDICAL, HEALTH PROD
Leading World Center for biotech research.
Robust private sector - start up oriented.
Maximum opportunity for licensing, Tech inflow, joint development.
2. ADVANCED TECH. PROD. & SERV
Over 30,000 people employed by > 75 firms - \$3-4 bil turnover.
Supported by University & Defence funded R&D.
3. TRANSPORT SYS, EQUIP, COMP, SERV.
San Diego has very ambitious light rail development plan.
Commuter rail project oceanside to San Diego will go ahead good opportunity for Cdn suppliers.
4. POWER & ENERGY EQUIP. & SERV.
Booming San Diego area has huge and growing demand for energy-gas and electricity. Canada will play a role in increased supply situation and possibly equip and consulting.

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

1. FOREST PRODUCTS, EQUIP, SERVICES
2. CONSTRUCTION INDUSTRY
3. POWER & ENERGY EQUIP. & SERV.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

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	19337.00 \$M	20001.00 \$M	20216.00 \$M	21833.00 \$M
Canadian Exports	235.00 \$M	244.00 \$M	250.00 \$M	255.00 \$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: 100+ \$M

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	85.00 %
EUROPE	6.00 %
AUSTRALIA	2.00 %
ASIA OR FAR EAST	2.00 %
SOUTH AFRICA	2.00 %
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. All agriculture & food products

Factors contributing to current successful Canadian exports:

- Fairs and Missions support
- Trade Fair activity
- Provincial export promotion
- Competitive pricing

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

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

Activity: Natural Food Expo 90/91
Expected Results: 10 Canadian firms.

Activity: Phoenix Retail Grocers 90/91
Expected Results: 6-8 Canadian firms.

Activity: California Grocers 90/91
Expected Results: 10 Canadian firms

Activity: Western Restaurant Association 91
Expected Results: 10 Canadian 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: Food brokers/distributors mission to Canada.
Expected Results: 10 brokerage/distributors

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

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	1198.00 \$M	1246.00 \$M	1251.00 \$M	1273.00 \$M
Canadian Exports	31.00 \$M	34.00 \$M	40.00 \$M	45.00 \$M
Canadian Share of Market	0.02 %	0.02 %	0.03 %	0.03 %

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

Major Competing Countries

Market Share

NORWAY	28.00 %
AUSTRALIA	25.00 %
SOUTH AMERICA	20.00 %
OTHER COUNTRIES	27.00 %

Current Status of Canadian

exports in this sector/subsector: Well established and growing

Products/services for which there are good market prospects:

1. All seafood.

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
- Competitive pricing
- Canada is one of few sources of supply

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

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

Activity: Seafare

Expected Results: Expand broker representation for Canadian products.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: ELECTRICAL & ELECTRONIC

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	3260.00 \$M	3270.00 \$M	3090.00 \$M	3060.00 \$M
Canadian Exports	650.00 \$M	650.00 \$M	600.00 \$M	600.00 \$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: 100+ \$M

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	85.00 %
UNITED KINGDOM	5.00 %
GERMANY WEST	4.00 %
JAPAN	4.00 %
KOREA	1.00 %
TAIWAN	1.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. Electronic components
2. Display systems
3. Electronic sub-assemblies
4. Enclosures & cabinets
5. Electro-optics
6. Test equipment
7. Simulators
8. 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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

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
- Lack of concentrated strategic mktg
- sales efforts. Lack agency repres'n

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

Activity: Adequate research on current opportunities.
Expected Results: Increased number of bids.

Activity: Update of local data base.
Expected Results: Better appt. setting for CDN companies.

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

Activity: AFCEA '90.
Expected Results: Introduce new companies to market.

Activity: Subcontractor's III
Expected Results: Introduce U.S. companies to Canadian capability.

Activity: Federal computer conference.
Expected Results: Increased sales to U.S. Government.

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

Activity: Federal Government Procurement Workshop (NEXUS)
Expected Results: Inform Canadian companies on how to sell to U.S. Government.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

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	8.00 \$M	7.90 \$M	7.80 \$M	7.80 \$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 %	0.50 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	98.00 %
UNITED KINGDOM	0.50 %
JAPAN	0.50 %
FRANCE	0.30 %
GERMANY WEST	0.20 %

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

Products/services for which there are good market prospects:

1. Waterside Security
2. Space Research
3. Anti Submarine Warfare
4. Remotely Operated Vehicles
5. Awaiting DDSP Approval
6. Potential DDSP Projects with USAF
7. NOSC, San Diego doing survey of Cdn capabilities
8. NOSC, San Diego doing survey of Cdn capabilities

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Fairs and Missions support
- Trade Fair activity
- Strong sectoral capability in Canada
- U.S.-Canada Defence
- Program.
- Development Sharing

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- Many of the R&D contracts are
- directed to domestic sources

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

Activity: Two new potential projects have been table at recent Space Division Working Group.

Expected Results: To lead to a DDSP project. Value unknown.

Activity: GMDD, teamed with TRW, have developed prototype NBC Reconnaissance Sys. currently undergoing oper'l testing/US Army.

Expected Results: Competing against Gen. Dynamics/Thyssen Henschel. Value \$300M

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

Activity: Underseas Defence '89.

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 scheduled for Feb. '90 with USAF Space Technology Center.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: AEROSPACE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	50.00 \$M	48.00 \$M	48.00 \$M	48.00 \$M
Canadian Exports	400.00 \$M	522.00 \$M	608.00 \$M	719.00 \$M
Canadian Share of Market	0.08 %	1.08 %	1.26 %	1.50 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	94.00 %
FRANCE	1.00 %
UNITED KINGDOM	1.00 %
ITALY	1.00 %
GERMANY WEST	1.00 %
JAPAN	1.00 %

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

Products/services for which there are good market prospects:

1. Aircraft Assemblies
2. Tooling for Assemblies
3. Simulators
4. Aircraft Sub-Assemblies
5. Tooling for Sub-Assemblies
6. Avionics
7. Ground Support Equipment
8. Avionics Components
9. Composites (Advanced) Materials
10. Fasteners
11. Assembly Design for 1 & 4
12. Engineering Design for 2 & 5

Factors contributing to current successful Canadian exports:

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- 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: Continue to increase P.C. usefulness
Expected Results: Improve use of resources.

Activity: Refine contact list & software
Expected Results: Improve utility & accuracy

Activity: Sector & sub-sector market study
Expected Results: Consolidation of diverse data

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

Activity: Attend AIAA Spring Exhibit in '90.
Expected Results: Opportunities for Canadian participants.

Activity: Attend AFCEA Spring Exhibit in '90
Expected Results: Opportunities for Canadian participants.

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

Activity: Complete survey of recent extensive Regional Industrial Reorganization.
Expected Results: Clearer view of sector development.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

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

A.T.F./A.T.A. Approximate Value: 50 M\$
 Financing Source : OTHER
 Contact : (213) 335-4439 - C.L.O.

MD Commercial series aircraft Approximate Value: 60 M\$
 Financing Source : OTHER
 Contact : (213) 335-4439 - C.L.O.

Space Station Approximate Value: 15 M\$
 Financing Source : OTHER
 Contact : (213) 335-4439 - C.L.O.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

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	10000.00 \$M	12000.00 \$M	15000.00 \$M	17000.00 \$M
Canadian Exports	100.00 \$M	120.00 \$M	160.00 \$M	175.00 \$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	50.00 %
JAPAN	15.00 %
GERMANY WEST	5.00 %
SWEDEN	5.00 %
OTHER COUNTRIES	25.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. Switching Systems
2. Data Links

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Trade Fair activity
- Provincial export promotion

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

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

Activity: Propose Vertical Mission(s).

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

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	4500.00 \$M	5500.00 \$M	6000.00 \$M	7000.00 \$M
Canadian Exports	20.00 \$M	25.00 \$M	30.00 \$M	35.00 \$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	40.00 %
JAPAN	35.00 %
KOREA	10.00 %
TAIWAN	5.00 %
HONG KONG	5.00 %
EUROPE	5.00 %

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

Products/services for which there are good market prospects:

1. Vertical software
2. Peripherals
3. Accessories

Factors contributing to current successful Canadian exports:

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

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
 - 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 Canexpo '89 leads

Activity: Follow-up on Comdex '89 leads

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

Activity: Prepare mini-missions (vertical)

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

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	1000.00 \$M	1200.00 \$M	1500.00 \$M	1700.00 \$M
Canadian Exports	60.00 \$M	70.00 \$M	80.00 \$M	90.00 \$M
Canadian Share of Market	6.00 %	6.00 %	5.00 %	5.00 %

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

Major Competing Countries

Market Share

JAPAN	34.00 %
KOREA	20.00 %
TAIWAN	18.00 %
UNITED STATES OF AMERICA	15.00 %
GERMANY WEST	13.00 %

Current Status of Canadian

exports in this sector/subsector: Well established and growing

Products/services for which there are good market prospects:

1. Hardparts
2. Accessories
3. Service Equipment
4. Chemicals

Factors contributing to current successful Canadian exports:

- Import duties are moderate
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Trade Fair activity
- Strong sectoral capability in Canada
- Competitive Canadian financing

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

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
- 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: Contact with Japanese transplant
Expected Results: Introduction of new order suppliers

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

Activity: SEMA '89 - Las Vegas
Expected Results: 9 Can. Exhibits

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

Activity: PAS/IAAS, Las Vegas, April 90
Expected Results: 8 Canadian exhibitors

Activity: Outgoing Mission to Japanese Transplant 90
Expected Results: 4-8 Canadian companies

Activity: SEMA 90 - Las Vegas
Expected Results: 10 Canadian Exhibitors

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

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	300.00 \$M	350.00 \$M	400.00 \$M	450.00 \$M
Canadian Exports	11.00 \$M	20.00 \$M	25.00 \$M	40.00 \$M
Canadian Share of Market	4.00 %	6.00 %	6.00 %	9.00 %

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

Major Competing Countries

Market Share

JAPAN	50.00 %
ITALY	30.00 %
UNITED STATES OF AMERICA	21.00 %
KOREA	5.00 %
GERMANY WEST	4.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. Light rail vehicles
2. Subsystems to above
3. Commuter rail vehicles
4. Consulting services
5. Training systems

Factors contributing to current successful Canadian exports:

- Import duties are moderate
- Aggressive marketing
- Fairs and Missions support
- Trade Fair activity
- Strong sectoral capability in Canada
- Competitive Canadian financing
- Willingness of exporters to invest/joint venture in territory

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Restrictive standards
- Non-competitive pricing
- 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: LACTC Century Freeway Rail System
Expected Results: Unknown. Bids pending.

Activity: Transportation Group Inc. (Div. of Bombardier)
Expected Results: In advanced negotiating stages.

Activity: People mover projects in S. California

Activity: Commuter Rail Projects in S. California
Expected Results: Preceding UTDC actively pursuing project.

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

Activity: As previously proposed Phoenix Project has been cancelled, others will take its place, such as indicated below.

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 missions to Vancouver.
Expected Results: Important as it influences decision making process.

Activity: Mission to Florida to TGI projects by Calif precision makers

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: MARINE INDUSTRIES

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	70.00 \$M	80.00 \$M	85.00 \$M	90.00 \$M
Canadian Exports	6.00 \$M	10.00 \$M	9.00 \$M	9.00 \$M
Canadian Share of Market	9.00 %	13.00 %	11.00 %	10.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	0.00 %
UNITED KINGDOM	0.00 %
GERMANY WEST	0.00 %

Products/services for which there are good market prospects:

1. Instrumentation
2. ROV's
3. Software
4. Consulting Services

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
- Canada is one of few sources of supply
- 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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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

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

Activity: Follow-up with ROV '89 exhibitors.

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

Activity: ROV '90 June, Vancouver, Incoming Mission

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

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	170.90 \$M	172.60 \$M	174.30 \$M	176.00 \$M
Canadian Exports	3.40 \$M	3.00 \$M	3.40 \$M	3.50 \$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: 100+ \$M

Major Competing Countries

Market Share

MIDDLE EAST OR NEAR EAST	3.00 %
EUROPE	3.00 %
MEXICO	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. Lumber (softwood)
2. Millwork
3. Shakes/shingles
4. Cabinets
5. Newsprint
6. Converted wood products
7. Coated paper products
8. Hardwood lumber

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Competitive pricing
- Strong sectoral capability in Canada
- Bilateral economic trade agreement
- Willingness of exporters to invest/joint venture in territory

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

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

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

- Activity: Southern California Home and Garden Show
- Activity: Building Industry Show
- Activity: Kitchen and Bath Industry Show 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: Report on L.A. city ordinance banning wood roofs.
- Activity: Report on use of recycled fibre in newsprint paper.
- Activity: Report on wood substitution in construction materials.
- Activity: Monitor opportunities for dimensioned S.P.F.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

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	48.00 \$M	50.00 \$M	60.00 \$M	80.00 \$M
Canadian Exports	6.00 \$M	7.00 \$M	6.00 \$M	7.00 \$M
Canadian Share of Market	13.00 %	14.00 %	10.00 %	8.70 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	80.00 %
GERMANY WEST	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. Instrumentation
2. Downhole Equipment
3. Software (Data Collection)
4. Chemicals
5. Services

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
- Willingness of exporters to invest/joint venture in territory

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

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

- _____
- _____

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 to Calgary Oil Show June 90.
Expected Results: 4-6 Buyers.

Activity: Exhibit in SPG Oil Show, Ventura, CA April 90.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

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	32337.00 \$M	34923.00 \$M	37717.00 \$M	40735.00 \$M
Canadian Exports	31.50 \$M	34.00 \$M	36.70 \$M	39.60 \$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: \$M

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	65.00 %
ASIA OR FAR EAST	30.00 %
EUROPE	5.00 %

Products/services for which there are good market prospects:

1. All apparel 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
- Trade Fair activity
- Provincial export promotion

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: LOS ANGELES

Market: UNITED STATES OF AMERICA

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

Activity: Montreal Pret
Expected Results: 10 Incoming Buyers

Activity: Magic (Mens Apparel) 90/91
Expected Results: 15 Canadian firms.

Activity: Solo Womans Apparel 90
Expected Results: 10 Canadian firms

Activity: Nexus Apparel
Expected Results: 10 Canadian firms

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: JEWELERY & GIFTWARE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1714.00 \$M	1800.00 \$M	1890.00 \$M	1984.50 \$M
Canadian Exports	1.42 \$M	1.50 \$M	1.57 \$M	2.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	0.00 %

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

Major Competing Countries

Market Share

HONG KONG	0.00 %
TAIWAN	0.00 %
PEOPLE'S REP OF CHINA	0.00 %
GERMANY WEST	0.00 %
MEXICO	0.00 %
EUROPE	0.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. Premium Gifts
2. Executive Gifts
3. Craft Products
4. Novelty Products
5. Toys and Games
6. Souvenir related Products
7. Paper 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
- Competitive pricing
- Strong sectoral capability in Canada
- Bilateral economic trade agreement
- Innovative Products.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

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

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

Activity: 11th California Gift Show July 1990
Expected Results: New product entry & increased Cdn presence in market.

Activity: Giftware NEXUS Mission, January 1991
Expected Results: New product entry & increased Cdn presence in market.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

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	145.20 \$M	160.00 \$M	176.00 \$M	193.60 \$M
Canadian Exports	6.10 \$M	7.00 \$M	7.50 \$M	7.75 \$M
Canadian Share of Market	4.20 %	4.36 %	4.26 %	4.00 %

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

Major Competing Countries

Market Share

TAIWAN	40.00 %
KOREA	20.00 %
JAPAN	15.00 %
FRANCE	4.00 %
HAITI, REPUBLIC OF	3.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. Action sports products
2. Outdoor products
3. Ski products
4. Exercise equipment
5. Golfing accessories

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
- Bilateral economic trade agreement

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

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
- _____
- _____

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

Activity: Ski Industries America Sports Expo 1991
Expected Results: New product entry & increased cdn presence in market.

Activity: Canadian sporting goods Assoc. Incoming Mission 1990.
Expected Results: Increased familiarity of available Cdn prods for miss.buyers

Activity: National Sporting Goods Assoc. Fall Market 1991
Expected Results: New product entry and increased Cdn presence in market.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: FURNITURE & APPLIANCES

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	13859.00 \$M	14967.00 \$M	16164.00 \$M	17457.00 \$M
Canadian Exports	147.00 \$M	158.70 \$M	171.40 \$M	185.10 \$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: \$M

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	85.00 %
EUROPE	5.00 %
ASIA OR FAR EAST	10.00 %

Products/services for which there are good market prospects:

1. All furniture and related accessories.

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

Factors for Canadian exports not reaching market potential:

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

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

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

Activity: IIDEX 90/91.
Expected Results: 30 Incoming Buyers.

Activity: Montreal Furniture Show 90/91.
Expected Results: 10 Incoming Buyers.

Activity: Toronto Furnitue Show 90/91.
Expected Results: 10 Incoming Buyers.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: CONSUMER ELECTRONICS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	9709.00 \$M	10000.00 \$M	10350.00 \$M	10712.00 \$M
Canadian Exports	19.01 \$M	19.96 \$M	20.96 \$M	22.01 \$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 KINGDOM	0.00 %
JAPAN	0.00 %
GERMANY WEST	0.00 %
NETHERLANDS	0.00 %

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

Products/services for which there are good market prospects:

1. Commercial printing
2. Book publishing
3. Miscellaneous printing

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
- 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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- _____
- _____

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

- Activity: American Booksellers Assoc. Exhibition June 1990
- Expected Results: Lic. agrmnts, new prod. entry & greater Cdn presence in mkt.

- Activity: Representation search on behalf of Canadian Commercial Printers.
- Expected Results: New prod. entry R&D mkt & qualified data base of local co.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

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	4535.00 \$M	4762.00 \$M	5000.00 \$M	5500.00 \$M
Canadian Exports	1.40 \$M	1.70 \$M	2.05 \$M	2.25 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	0.00 %

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

Major Competing Countries

Market Share

UNITED KINGDOM	0.00 %
GERMANY WEST	0.00 %
JAPAN	0.00 %
SWITZERLAND	0.00 %
SWEDEN	0.00 %

Products/services for which there are good market prospects:

1. Biologicals
2. Medicinals and botanicals
3. Pharmaceuticals

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
- Strong sectoral capability in Canada
- Bilateral economic trade agreement
- 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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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

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

Activity: American Society of Microbiology May 1990

Expected Results: Strategic coop'n agrmnts.new prod entry/incr.Cdn pres.in mkt

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

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	257.83 \$M	269.43 \$M	281.56 \$M	295.64 \$M
Canadian Exports	5.50 \$M	5.70 \$M	6.01 \$M	6.31 \$M
Canadian Share of Market	2.14 %	2.14 %	2.14 %	2.13 %

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

Major Competing Countries

Market Share

GERMANY WEST	30.00 %
UNITED KINGDOM	6.60 %
NETHERLANDS	4.60 %
JAPAN	25.00 %
FRANCE	5.00 %

Products/services for which there are good market prospects:

1. Electro medical equipment
2. Surgical equipment
3. Disposable supplies
4. Dental equipment
5. X-ray equipment

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
- Canada is one of few sources of supply
- Bilateral economic trade agreement
- Willingness of exporters to invest/joint venture in territory

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Limited appreciation/understanding of distribution system

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

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

Activity: National Home Health Care Exposition

Expected Results: Product entry & greater Cdn presence in market.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

Sector : CONSTRUCTION INDUSTRY

Sub-Sector: BUILDING PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	41.10 \$M	40.50 \$M	39.20 \$M	38.50 \$M
Canadian Exports	820.00 \$M	800.00 \$M	780.00 \$M	760.00 \$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: 30-60 \$M

Major Competing Countries

Market Share

MIDDLE EAST OR NEAR EAST	5.00 %
EUROPE	5.00 %
SOUTH 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. Fab structural metal
2. Flat glass
3. Ceramic tile
4. Dimensional stone
5. Plumbing equipment
6. Building hardware
7. Pre-fab buildings

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
- Bilateral economic trade agreement
- Willingness of exporters to invest/joint venture in territory

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

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

- _____
- _____

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

- Activity: Southern California Home and Garden Show
- Activity: Building Industry Show
- Activity: Kitchen and Bath Industry Show West
- Activity: International Tile Exposition

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

- Activity: NEXUS Hardware

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

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	2100.00 \$M	2300.00 \$M	2500.00 \$M	2800.00 \$M
Canadian Exports	100.00 \$M	120.00 \$M	150.00 \$M	165.00 \$M
Canadian Share of Market	4.76 %	5.43 %	6.00 %	5.89 %

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

Major Competing Countries	Market Share
JAPAN	55.00 %
TAIWAN	12.00 %
UNITED STATES OF AMERICA	10.00 %
KOREA	7.00 %
EUROPE	5.00 %
GERMANY WEST	4.00 %

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

Products/services for which there are good market prospects:

1. Environmental equipment
2. Packaging machinery
3. Printing equipment
4. Robotics
5. Food processing machinery

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
- Competitive Canadian financing

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

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

- _____
- _____

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

Activity: Gutenberg Festival
Expected Results: Exporue, sales for Cdn co.

Activity: Westec '91
Expected Results: Exposure, sales for Cdn co.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

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

MWD Water Supply, Treatment

Approximate Value: 1 M\$
Financing Source : DOM - Domestically funded
Contact : M. Pascal (213) 687-7432

Colorado River Board

Approximate Value: 300 M\$
Financing Source : DOM - Domestically funded
Contact : M. Pascal (213) 687-7432

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

Sector : INDUSTRIAL MACHIN, PLANTS, SERV.

Sub-Sector: TOOLS & HARDWARE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	4000.00 \$M	4100.00 \$M	4200.00 \$M	4350.00 \$M
Canadian Exports	46.00 \$M	53.00 \$M	44.00 \$M	46.00 \$M
Canadian Share of Market	1.20 %	1.00 %	1.00 %	1.10 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	90.00 %
JAPAN	5.00 %
ITALY	1.00 %
TAIWAN	1.00 %
KOREA	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. Metal cutting
2. Power tools
3. Metal cutting machinery
4. Metal forming machinery

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: LOS ANGELES

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

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

- _____
- _____

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

Activity: WESTEC '91

Expected Results: Exposure, sales for canadian companies.

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: LOS ANGELES

Country: UNITED STATES OF AMERICA

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

- EEC
- Japan
- Taiwan
- Korea

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

- Joint Ventures.
Capital Availability - inbound/outbound investments.
Acquisition of potential investor companies.
Technology Transfer.

IDP Partners and related program activities:

Rimtech.

- Base of 200 Executive officers for joint ventures activities

Rockcliffe Research & Technology

- Convenor - Inbound Mission - Joint ventures

Discovery Foundation B.C.

- Joint venture - matchmaking

Canadian Assoc. of Venture Capitalists

- Provision of venture capital cos - receipt of business proposals, provision of audience as investment contacts.

San Diego Venture Group.

- Provision of venture capital cos. - receipt of business proposals, provision of audience as investment contacts.

Orange Coast Venture Group.

- Provision of venture capital cos. - receipt of business proposals, provision of audience as investment contacts.

Tuscon World Trade Assoc.

- Provision of venture capital cos. - receipt of business proposals, provision of audience as investment contacts.

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: LOS ANGELES

Country: UNITED STATES OF AMERICA

Compared to major competitive destinations, Canada is perceived to have

the following advantages:

- Familiar, friendly, hospitable government.
Low \$ value.
- Educated work force, more of the same.

the following constraints:

- Lack of notorious high tech capabilities, long distance from territory, small market (dispersed).
- Known branch plant internal policies (Quebec) territory, risk adverse climate. Not regarded as international market.

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	LOW
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 an assigned ranking A = High B = Medium C = Low

Sector	Ranking
Agriculture/Food/Fish	B
Resource Processing	B
Machinery and Equipment	A
Transportation	A
Consumer Products	B
Commercial Service	B
Computer and Communications	A
Health Care Products/Medical	B
Aerospace and Defence	B
Strategic Technologies	A

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PEMD - Proposed Government Promotional Activities 1990/91

Proposals As Of December 23/89

Post: Los Angeles

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Contact</u>
90/06/00	Woodworking Machinery & Supply Fair, Anaheim Fair, National Stand	Industrial Machinery, Prod & Services
90/10/00	Lighting World Los Angeles Fair, National Stand	Advanced Tech. Products & Services
90/10/03	UNIX Solutions Anaheim Fair, National Stand	Advanced Tech. Products & Services
90/11/12	COMDEX Fall, Computer Show Las Vegas Fair, National Stand	Advanced Tech. Products & Services
90/12/00	SEMA - Las Vegas Fair, National Stand	Transport Sys. Equipment & Services

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: MINNEAPOLIS

Country: UNITED STATES OF AMERICA

Canadian exports to the six states covered by the Minneapolis post totaled \$5.0 billion (CDN) in 1988, or approximately 5.11% of Canada's worldwide exports. Regional interests are particularly important since 40% of Western Canada's total exports move into this market.

Economic growth during the past year in the Upper Midwest moderated somewhat but remained relatively healthy. No major change is expected during the next year. Minnesota continues to be the star performer in the territory propelled by strong growth in the Twin Cities, St. Cloud, and Rochester areas. Mpls./St. Paul, according to the Grant Thornton Index, has the second strongest regional economy (after San Diego) in the United States. On the down side, recent lay-offs in the high tech and computer industries have led to a slow down of economic growth in the Twin Cities.

Iowa's economy performed strongly in the past 12 months as did Nebraska's with employment growth exceeding the national average. North Dakota and South Dakota have been experiencing a stagnant economy, partially as a result of last years drought but have been showing some improvement in recent months. The Montana economy remains weak although the mining sector is performing well.

The implementation of the Canada-U.S. Free Trade Agreement has resulted in increased activity for the post in handling export and investment inquiries as well as participating in trade seminars and speaking engagements.

The Upper Midwest continues to be one of the largest importers of Canadian oil, gas and electricity. Prospects for increased sales in this regard, particularly from Manitoba Hydro, are promising.

Located in the post's region are 24 Fortune 500 firms. The Twin Cities area is the third largest high tech center in the U.S. and is also the headquarters of such well known firms as Control Data, Honeywell, 3M, Medtronic, Data Card Corporation and Hutchinson Technology. Other major multinational firms such as IBM, Unisys and Rockwell maintain subsidiaries in the territory. Agri-business giants ConAgra, General Mills, Land 'O Lakes, Pillsbury and Cargill are also headquartered here.

Trade policy issues of concern within the territory at the post include durum wheat, live hogs, processed pork, electricity and softwood lumber.

The post's trade promotion efforts in 90/91 will be concentrated on the following sectors: 1. Agricultural Equipment and Machinery, 2. Processed Food and Beverage Products, 3. Residential and Contract Furniture, 4. Defence Components, 5. Electronics and Software, 6. Construction Products, Lumber and Manufactured Wood Products, 7. Health Care and Biotech Products, 8. Apparel, 9. Sporting Goods, 10. Giftware. NEBS missions are planned for companies in the apparel, food, agricultural equipment, software, printing, medical equipment, defence and industrial products fields while solo trade shows will be held for giftware, residential/contract furniture, food products and building products firms. Incoming missions in defence equipment, contract furniture, residential furniture and apparel are planned as are outgoing missions in computer peripherals/software and ag components.

Market surveys covering the plastics industry, the architectural and engineering sector, the apparel and the electrical transmission

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RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: MINNEAPOLIS

Country: UNITED STATES OF AMERICA

distribution industry will also be undertaken over the next fiscal year.

As in the past, the post will devote significant effort in the coming year to assisting small to medium sized Canadian companies penetrate the U.S. market for the first time.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 EXPORT PROMOTION PRIORITIES

Mission: MINNEAPOLIS

Country: UNITED STATES OF AMERICA

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

Farming practices in the region are similar to those in Western Cda. To Canadian manufacturers the market is large, close and easily accessible. Minneapolis is a major food and beverage distribution and processing center.

2. GRAINS AND OILSEEDS

The Upper Midwest utilizes much of the same grain handling equipment as does Canada, and Canada's manufacturers have developed innovative high quality equipment that is cost competitive.

3. CONSUMER PRODUCTS & SERVICES

Minneapolis is major regional distribution center and is also headquarters to one of the largest U.S. retailers, the Dayton/Hudson Corporation.

4. DEFENCE PROGRAMS, PRODUCTS, SERV

Prime defence contractors in region include Honeywell, Unisys, FMC, Rockwell International, and Brunswick. Sub-contracting opportunities exist in electronic components castings, and machined parts.

5. ADVANCED TECH. PROD. & SERV

The Twin Cities continues to be a leading area in the development of electronics/computer technology with firms such as Cray Research, Control Data, and Unisys. Numerous smaller firms produce process controls and components.

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

1. OIL & GAS EQUIPMENT, SERVICES
2. FOREST PRODUCTS, EQUIP, SERVICES
3. POWER & ENERGY EQUIP. & SERV.
4. AGRI & FOOD PRODUCTS & SERVICE

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MINNEAPOLIS

Market: UNITED STATES OF AMERICA

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	1340.00 \$M	1360.00 \$M	1370.00 \$M	1380.00 \$M
Canadian Exports	44.00 \$M	45.00 \$M	46.00 \$M	47.00 \$M
Canadian Share of Market	3.00 %	3.00 %	3.00 %	3.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	0.00 %
MEXICO	0.00 %

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

Products/services for which there are good market prospects:

1. Processed specialty foods.
2. Meat.
3. Beer and spirits.

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MINNEAPOLIS

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
 - Restrictive standards
 - Non-competitive pricing
 - Lack of promotion and advertising
 - Non-competitive financing
 - Limited appreciation/understanding of distribution system
 - Limited Canadian capabilities
 - Market prospects have not been adequately explored
 - Performance of local agent or representative
 - Labelling
 - regulations
-
-

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

Activity: Continue initiative with meat wholesalers.
Expected Results: Increased market penetration/sales.

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

Activity: Solo Food Show
Expected Results: Introduction of new mfgs. to market, increased sales.

Activity: Upper Midwest Hospitality Show
Expected Results: Increased sales.

Activity: NEBS Mission for food processors.

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MINNEAPOLIS

Market: UNITED STATES OF AMERICA

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

Activity: Sourcing/Investment presentations to local food processors.
Expected Results: Sourcing and investment leads.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MINNEAPOLIS

Market: UNITED STATES OF AMERICA

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: AGRICULTURE MACH, EQUIP, TOOLS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	405.00 \$M	421.00 \$M	480.00 \$M	500.00 \$M
Canadian Exports	71.90 \$M	104.70 \$M	120.00 \$M	130.00 \$M
Canadian Share of Market	16.80 %	24.90 %	25.00 %	26.00 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	0.00 %
GERMANY WEST	0.00 %
ITALY	0.00 %
JAPAN	0.00 %
UNITED KINGDOM	0.00 %
FRANCE	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. Other Agricultural Equipment
2. Soil Preparation, Seeding and Fertilizing Equip.
3. Tractors
4. Combine Reapers Threshers and Parts
5. Other Haying and Harvesting Machinery
6. Truck Boxes
7. Livestock Equipment
8. Tillage Equipment
9. Minimum till-no till Equipment

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MINNEAPOLIS

Market: UNITED STATES OF AMERICA

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
- Competitive pricing
- Strong sectoral capability in Canada
- Bilateral economic trade agreement
- Willingness of exporters to invest/joint venture in territory

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Lack of Cdn prod. suitable for
- row crop production.

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

Activity: Northern Farm Show - Information Booth, St. Paul, Minnesota
 Expected Results: Increased awareness of Cdn capabilities in farm mach. in MN

Activity: Montana Agricultural Industrial Exposition, Great Falls, MT
 Expected Results: Increased awareness of Cdn capabilities in farm mach. in MT

Activity: Triumph of Agriculture, National Stand, Omaha, Nebraska
 Expected Results: Increased visibility for Cdn manufacturers in Eastern NE.

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

Activity: Husker Harvest Days '90, Grand Island, Nebraska
 Expected Results: Sales of \$5million (Cdn) over 3 year period.

Activity: Northern Farm Show, Minneapolis, Minnesota
 Expected Results: Enhanced exposure & sales of Cdn farm equip. in Minnesota.

Activity: Montana Agricultural Industrial Expo, Great Falls, Montana
 Expected Results: Enhanced exposure and sales of Cdn farm equip. in Montana.

Activity: Triumph of Agriculture Exposition, Omaha, Nebraska
 Increased visibility for Cdn manufacturers in Eastern NE.

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MINNEAPOLIS

Market: UNITED STATES OF AMERICA

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 6-10 new distributors/ reps in farm equipment sector.
Expected Results: Further develop network of farm equip. contacts in post terr

Activity: Canadian International Farm Equipment Show, Toronto, Ontario
Incoming Buyers Mission
Expected Results: Appointment of 4 agents/distributors within six months.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MINNEAPOLIS

Market: UNITED STATES OF AMERICA

Sector : GRAINS AND OILSEEDS

Sub-Sector: GRAIN HANDLING EQUIPMENT

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	293.00 \$M	305.00 \$M	325.00 \$M	330.00 \$M
Canadian Exports	52.00 \$M	75.70 \$M	80.00 \$M	80.00 \$M
Canadian Share of Market	17.80 %	24.80 %	24.60 %	24.20 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	0.00 %
GERMANY WEST	0.00 %
ITALY	0.00 %
UNITED KINGDOM	0.00 %
FRANCE	0.00 %
AUSTRALIA	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. Grain Augers
2. Windrowers/Swathers
3. Grain Bins
4. Grain Vacs
5. Grain Monitoring Equipment
6. Grain Boxes
7. Bin Sweeps
8. Grain Cleaners

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MINNEAPOLIS

Market: UNITED STATES OF AMERICA

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
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- Willingness of exporters to invest/joint venture in territory
- Similarity of farming
- plains to those in W. Cda
- practices in Upper Mid.

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
 - Economic downturn in the farm sec.
-

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

Activity: New Exporters to Border States, Minot, North Dakota
Expected Results: Enhanced export readiness for small manufacturers.

Activity: North Dakota Ag Expo - Minot, North Dakota - Information Booth
Expected Results: Enhanced exposure and sales of Cdn. grain handling equip.

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

Activity: Western Canada Farm Progress Show - Incoming Buyers Mission
Expected Results: Appointment of 4 agents/distributors within six months.

Activity: Husker Harvest Days 1990, Grand Island, Nebraska
Expected Results: Sales of \$5 million (CDN) over 3 years.

Activity: Northern Farm Show, Minneapolis, Minnesota
Expected Results: Enhanced exposure of sales of Cdn. grain handling equip.

Activity: Montana Agricultural Industrial Expo, Great Falls, Montana
Expected Results: Enhance exposure and sales of Cdn. grain handling equip.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MINNEAPOLIS

Market: UNITED STATES OF AMERICA

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 6-10 new distributors/ reps. in the grain handling sector.
Expected Results: Further develop network of gr. handling reps/distr in terr.
- Activity: Canadian International Farm Equipment Show - Toronto, Ont.
Incoming Buyers Mission
Expected Results: Appointment of 4 agents/distr. within six months.
- Activity: NEBS mission to Great Falls, Montana
Expected Results: Enhanced export readiness for small manufacturers.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MINNEAPOLIS

Market: UNITED STATES OF AMERICA

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	219.00 \$M	226.00 \$M	230.00 \$M	232.00 \$M
Canadian Exports	15.00 \$M	16.00 \$M	16.00 \$M	17.00 \$M
Canadian Share of Market	6.80 %	6.90 %	6.90 %	7.30 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	85.00 %
JAPAN	5.00 %
TAIWAN	2.00 %
KOREA	1.00 %
ISRAEL	1.00 %
UNITED KINGDOM	1.00 %

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

Products/services for which there are good market prospects:

1. Printed Circuit Boards
2. Connectors
3. Precision machining
4. Propellants
5. Castings
6. Capacitors
7. Resistors
8. Transformers

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
- Bilateral economic trade agreement

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MINNEAPOLIS

Market: UNITED STATES OF AMERICA

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: Update defence industry survey through comprehensive program of company calls.

Expected Results: New leads for Canadian suppliers.

Activity: Follow-up to Strategic Air Command visit.

Expected Results: Source Canadian products to meet SAC requirements.

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

Activity: High Technology Conference
Identify new Canadian suppliers.

Activity: U.S. Canada Subcontractors Conference

Expected Results: Bring new U.S. firms to meet 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: Follow-up 1989 Defence NEBS with sales mission.

Expected Results: Increase Canadian's sales in Upper Midwest.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MINNEAPOLIS

Market: UNITED STATES OF AMERICA

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	2175.00 \$M	2392.00 \$M	2631.00 \$M	2763.00 \$M
Canadian Exports	91.00 \$M	100.00 \$M	111.00 \$M	116.00 \$M
Canadian Share of Market	4.20 %	4.20 %	4.20 %	4.20 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	55.00 %
JAPAN	15.00 %
TAIWAN	4.00 %
KOREA	5.00 %
MEXICO	3.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. Printed Circuit Boards
2. Connectors
3. Castings
4. Automated Production Equipment
5. Plastic Components
6. Software

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MINNEAPOLIS

Market: UNITED STATES OF AMERICA

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: Develop trade information mailing on regular periodic basis using newsletter format.
Expected Results: Introduce 12-15 Canadian vendors to local sales reps.

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

Activity: Midwest Electronics Expo '90.
Expected Results: Introduce 10 new Canadian suppliers to electronics market.

Activity: Organize solo software mission.
Introduce selected software developers to Twin City 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: Prepare market study of plastics industry.
Expected Results: Identify mkt oport. for Cdn suppliers of resins/components.

Activity: Prepare analysis of high tech industry.
Expected Results: Identify market opportunities.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MINNEAPOLIS

Market: UNITED STATES OF AMERICA

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	1042.00 \$M	1058.00 \$M	1063.00 \$M	1065.00 \$M
Canadian Exports	26.00 \$M	30.00 \$M	34.00 \$M	36.00 \$M
Canadian Share of Market	2.50 %	2.80 %	3.20 %	3.40 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	42.00 %
HONG KONG	14.00 %
KOREA	7.00 %
TAIWAN	7.00 %
ITALY	6.00 %

Current Status of Canadian

exports in this sector/subsector: Well established and growing

Products/services for which there are good market prospects:

1. Outerwear
2. Footwear
3. Furs
4. Knitwear/Hosiery
5. Skiwear

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- Trade Fair activity
- Competitive pricing
- Strong sectoral capability in Canada
- Bilateral economic trade agreement
- Superior styling; Design
- for U.S. market.
- and/or pricing adjustment

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MINNEAPOLIS

Market: UNITED STATES OF AMERICA

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
- Limited appreciation/understanding of distribution system
- Limited Canadian capabilities
- Performance of local agent or representative
- Higher labor rates than offshore
- competitors, resulting in higher pr

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

Activity: Host Cougar U.S.A. "Appreciation Night"
Expected Results: Increase sales of Canadian footwear.

Activity: Incoming Buyers Mission to Cdn. International Womenswear Show (March 1990)
Expected Results: Increase sales of Canadian ladies' better clothing.

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

Activity: Incoming Buyers Mission to Canadian Outerwear Show
Expected Results: Increase sales of moderate outerwear.

Activity: Incoming Buyers Mission to Canadian International Womenswear Show (Sept. 1990)
Expected Results: Increase sales of ladies better clothing.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MINNEAPOLIS

Market: UNITED STATES OF AMERICA

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

Activity: Apparel NEBS Mission
Expected Results: Educate 12 new exporters.

Activity: Visits to 25 new retailers in territory.
Expected Results: Increase awareness of Canadian suppliers.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MINNEAPOLIS

Market: UNITED STATES OF AMERICA

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: JEWELERY & GIFTWARE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	881.00 \$M	886.00 \$M	890.00 \$M	895.00 \$M
Canadian Exports	22.00 \$M	24.00 \$M	25.00 \$M	26.00 \$M
Canadian Share of Market	2.50 %	2.70 %	2.80 %	2.90 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	36.00 %
TAIWAN	12.00 %
HONG KONG	10.00 %
KOREA	8.50 %
ITALY	8.00 %
SWEDEN	3.00 %

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

Products/services for which there are good market prospects:

1. General Giftware.

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- PEMD support
- Provincial export promotion
- Competitive pricing
- Strong sectoral capability in Canada
- Bilateral economic trade agreement
- Superior quality and
- ability to U.S. market.
- innovative designs; suit-

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MINNEAPOLIS

Market: UNITED STATES OF AMERICA

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
- Limited appreciation/understanding of distribution system
- Performance of local agent or representative
- Border clearance procedures;
- high pricing; one-item lines.

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

Activity: Report on Canadian Giftware Solo Show to Canadian Trade Association
Expected Results: Increase exposure re: trade promotions among Cdn. firms.

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

Activity: Canadian Giftware Solo Show (June 1990)
Expected Results: Provide 25 Cdn. firms w/opportunity to meet 150 local reps.

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 20 new giftware retailers in territory.
Expected Results: Increase awareness of giftware suppliers.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MINNEAPOLIS

Market: UNITED STATES OF AMERICA

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	604.00 \$M	611.00 \$M	619.00 \$M	622.00 \$M
Canadian Exports	44.00 \$M	46.00 \$M	47.00 \$M	48.00 \$M
Canadian Share of Market	7.30 %	7.50 %	7.60 %	7.70 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	49.00 %
TAIWAN	26.00 %
JAPAN	9.00 %

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

Products/services for which there are good market prospects:

1. Metal Fasteners
2. Hockey Equipment
3. Lawn/Garden Products
4. Cutting Tools/Parts
5. Hand Tools
6. Outdoor Sports 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
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- Bilateral economic trade agreement

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MINNEAPOLIS

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- 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: Work with Chicago post on cooperative hardware marketing strategy.

Expected Results: Increase awareness of Cdn. hardware products.

Activity: Incoming Buyers Mission to CSGA Show (February 1990)

Expected Results: Increase sales of sporting goods.

Activity: Info. Booth at MN Nursery Landscape Show (Jan. 1990)

Expected Results: Increase awareness of lawn/garden 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: Canadian Building Products/Hardware Solo Show.

Expected Results: Increase sales of hardware products.

Activity: Visit 10 hardware wholesalers/distributors in territory.

Expected Results: Increase awareness of Canadian suppliers.

Activity: Incoming Buyers Mission to CSGA Show (February 1990)

Expected Results: Increase sales of sporting goods.

Activity: Sporting Goods NEBS Mission.

Expected Results: Educate 10 new exporters.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MINNEAPOLIS

Market: UNITED STATES OF AMERICA

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: FURNITURE & APPLIANCES

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	170.00 \$M	174.00 \$M	175.00 \$M	177.00 \$M
Canadian Exports	20.00 \$M	20.00 \$M	20.00 \$M	21.00 \$M
Canadian Share of Market	12.00 %	12.00 %	13.00 %	13.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	70.00 %
TAIWAN	15.00 %
ITALY	3.00 %
DENMARK	3.00 %

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

Products/services for which there are good market prospects:

1. Office Furniture
2. Health Care/Institutional
3. Residential Furniture

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
- Competitive pricing

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MINNEAPOLIS

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Unsuitable product
- Non-competitive financing
- Limited appreciation/understanding of distribution system
- Limited Canadian capabilities
- 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: On-going program of assistance to Furniture West with permanent showroom and trade shows.
Expected Results: Increased penetration of U.S. market.

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

Activity: MSAIA/ASID Show
Expected Results: Increased market penetration.

Activity: IIDEX Incoming Buyers Mission
Expected Results: Increased sales.

Activity: Toronto/Montreal/Incoming Buyers Missions
Expected Results: Increased sales.

Activity: NEBS Missions
Expected Results: Enhanced export readiness.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MINNEAPOLIS

Market: UNITED STATES OF AMERICA

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	200.00 \$M	200.00 \$M	210.00 \$M	217.00 \$M
Canadian Exports	18.00 \$M	19.20 \$M	20.00 \$M	21.00 \$M
Canadian Share of Market	9.00 %	9.60 %	9.50 %	9.60 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	0.00 %
EUROPEAN COMMON MARKET C	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. Laboratory Products
2. Orthopedic Products
3. Furniture
4. Medical Devices
5. Disposable Products

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MINNEAPOLIS

Market: UNITED STATES OF AMERICA

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
- Market prospects have not been adequately explored
- Cdn firms relatively new to
- exporting in this market.

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

Activity: Care Providers of Minnesota - Minneapolis, Minnesota - Information Booth
Expected Results: Promote exposure and sales of Cdn healthcare prod. to terr.

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

Activity: Care Providers of Minnesota - Minneapolis, Minnesota - Information Booth
Expected Results: Promote exposure and sales of Cdn healthcare prod. to terr.

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

Activity: Increase number of corporate liaison visits in post territory.
Expected Results: Create a network of healthcare ind. contacts in Twin Cities.

Activity: New Exporters to Border States
Expected Results: Enhanced export readiness for small manufacturers.

Activity: NEXUS mission to post territory.
Expected Results: Enhanced export readiness; Provide market info. on Upper Md.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MINNEAPOLIS

Market: UNITED STATES OF AMERICA

Sector : CONSTRUCTION INDUSTRY

Sub-Sector: BUILDING PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	835.00 \$M	840.00 \$M	845.00 \$M	850.00 \$M
Canadian Exports	20.00 \$M	20.00 \$M	21.00 \$M	21.00 \$M
Canadian Share of Market	2.00 %	3.00 %	3.00 %	3.00 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	0.00 %
TAIWAN	0.00 %
KOREA	0.00 %
JAPAN	0.00 %

Products/services for which there are good market prospects:

1. Products for residential remodeling.
2. Commercial construction products.
3. Residential construction products.
4. Architectural and design services.

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
- Competitive pricing
- Willingness of exporters to invest/joint venture in territory

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MINNEAPOLIS

Market: UNITED STATES OF AMERICA

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
- Limited Canadian capabilities
- 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: NEBS Mission for Architects
Expected Results: Enhanced export readiness, formation of joint ventures.

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

Activity: MSAIA/ASID Show
Expected Results: Increased sales and product exposure.

Activity: Northwestern Lumbermen's Show
Expected Results: Increased sales and product exposure.

Activity: Building Products Solo Show
Expected Results: Exposure to market.

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: MINNEAPOLIS

Country: UNITED STATES OF AMERICA

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
Two years ago	500.00	10.00	0.00
One year ago	500.00	10.00	0.00
Current year	500.00	10.00	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:

Impossible to predict. Could range from low millions to much higher figure depending primarily on major acquisitions or plant expansions which may or may not occur. Rough guess would be \$5 - 20 million.

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

- United Kingdom
- Germany
- Other EEC
- Taiwan
- Mexico
- Japan

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

- No other govts. maintain trade offices in our territory. However, incoming inv./trade missions from European and Asian countries are common. Other U.S. states are also active in MN in promoting inv. to their respective states. Adv. and direct mail campaigns are most prevalent mktg tool.

IDP Partners and related program activities:

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: MINNEAPOLIS

Country: UNITED STATES OF AMERICA

IDP Partners and related activities cont d:

Ontario Government Office - St. Paul, MN
 - Concentrate on investment promotion.

Manitoba Dept. of Industry and Trade
 - Have leveled off their investment promotion activity in
 territory due to poor results.

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

- Political Stability
- Repatriation of Profits
- Quality of Life
- Common Business Practices
- Inexpensive energy

the following constraints:

- Tax Structure
- Labour Rates
- Unions
- Size of market
- Proximity of market

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	MEDIUM
Joint Venture	MEDIUM
Strategic Partnering	MEDIUM
Technology Licensing	MEDIUM

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: MINNEAPOLIS

Country: UNITED STATES OF AMERICA

The mission believes that the following sectors are of greatest interest to investors in its territory/country an assigned ranking A = High B = Medium C = Low

Sector	Ranking
Agriculture/Food/Fish	A
Resource Processing	C
Machinery and Equipment	C
Transportation	C
Consumer Products	C
Commercial Service	B
Computer and Communications	A
Health Care Products/Medical	A
Aerospace and Defence	B
Strategic Technologies	C

DEPARTMENT OF EXTERNAL AFFAIRS

PEMD - Proposed Government Promotional Activities 1990/91

Proposals As Of December 23/89

Post: Minneapolis

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Contact</u>
90/04/00	Solo Food Fair Minneapolis Fair, Solo	Agri & Food Products & Services
91/01/00	Montana Agri-Trade Expo Info Booth	Agri & Food Products & Services

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: NEW YORK, CONSULATE GENERAL

Country: UNITED STATES OF AMERICA

ECONOMIC OUTLOOK - Growth in the Consulate General's territory is expected to remain moderate in 1990. As for 1989, its performance will depend ultimately on the course of the national economy and the continued constraints to regional growth that are caused by shortages in the labor force, high costs of housing and an inadequate transportation infrastructure. Slower economic growth in other major industrialized economies will also have a dampening effect. Employment growth can be expected to remain soft for 1990, reflecting the slower pace of growth in the regional economy and further rationalization in the financial services industry. The exodus of manufacturing jobs from New York City to the farther fringe of the metropolitan area is expected to continue as land for industrial expansion in the immediate vicinity of the city remains scarce. Unemployment rates for the region as a whole should remain below the national average in the 4% range and labor shortages will likely continue to create inflationary pressures in the region.

TRADE OUTLOOK - A strong Canadian dollar and a moderating U.S. economy are constraining growth in our exports and presumably will continue to do so well into 1990. The Free Trade Agreement will have a positive long term impact on exports to our territory. In the short run, it is stimulating interest by Canadian exporters and U.S. buyers. We will continue to introduce new small and medium sized Canadian firms to this market, particularly the apparel, fish and food, computer software and design furniture sectors. Sectors with high levels of trade (urban transit, defence, marine equipment and auto part) will require attention as will issues concerning market access. The addition of an officer located in Princeton will focus on trade, investment and technology opportunities along New Jersey's hi-tech corridor. In Bermuda, a trade show in May 1989 has sparked a growing interest in Canadian products, notably in the construction materials and institutional food sectors.

INVESTMENT - High cost environment in New York area will continue to seek locations out of the area and IDP will pursue companies especially those with significant research requirements. Direct investment interest is accelerating in area of acquisitions reflecting high level of mergers and acquisitions activity in the U.S. Problems in area of highly leveraged transactions are occurring in greater numbers and should be monitored in the future. As the financial centre of the world, New York will continue to offer unique availability of such services as project finance, buyout funds and venture capital as well as large numbers of financial intermediaries who can assist us in selling our programs.

TOURISM OUTLOOK - Awareness of Canada remains high. However, Canada must continue to increase its efforts in this market because of competition from the U.S.A., Europe and Caribbean.

Opportunities: take advantage of the trend to shorter and more frequent vacations plus strong interest of Meetings, Conventions and Incentive segment.

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: NEW YORK, CONSULATE GENERAL

Country: UNITED STATES OF AMERICA

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 EXPORT PROMOTION PRIORITIES

Mission: NEW YORK, CONSULATE GENERAL Country: UNITED STATES OF AMERICA

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 3 U.S. Army Commands and numerous defence contractors in our territory offer a lucrative market to Canadian exporters of defence-related products in all 3 states that comprise the posts territory.

2. CONSUMER PRODUCTS & SERVICES

The quality and diversity of Canadian apparel products particularly childrenswear and outerwear have already caught the attention of U.S. importers, and sales are growing rapidly. Exports of Canadian furniture and design products are already impressive but represent only a small percentage of a vast potential market.

3. ADVANCED TECH. PROD. & SERV

Canadian software developers have developed a reputation in this market for innovation and quality. Rapidly increasing computerization of American life is creating many new market niches where Canadians can excel.

4. FISHERIES, SEA PRODUCTS & SERV.

The New York area is a \$2 billion annual market for seafood of all kinds. Canadian exporters already have a significant portion of the market but the potential for increased sales and new products is vast.

5. EDUCATION, MEDICAL, HEALTH PROD

The concentration of pharmaceutical and health care research and new product development in Central New Jersey offers attractive trade, investment and technology possibilities to Canadian firms.

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

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

4. AGRI & FOOD PRODUCTS & SERVICE
5. ADVANCED TECH. PROD. & SERV
6. OIL & GAS EQUIPMENT, SERVICES

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: NEW YORK, CONSULATE GENERAL Market: UNITED STATES OF AMERICA

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	4000.00 \$M	4200.00 \$M	4400.00 \$M	4300.00 \$M
Canadian Exports	1000.00 \$M	1200.00 \$M	1400.00 \$M	1300.00 \$M
Canadian Share of Market	25.00 %	28.00 %	30.00 %	29.00 %

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

Major Competing Countries

Market Share

JAPAN	0.00 %
IRELAND	0.00 %
NORWAY	0.00 %
DENMARK	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. Cod
2. Flatfish
3. Lobster
4. Scallops
5. Salmon
6. Saltfish

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- _____
- _____

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NEW YORK, CONSULATE GENERAL

Market: UNITED STATES OF AMERICA

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

Activity: New York Seafood Show
Expected Results: Introduction of 14 firms to this market

Activity: Calls will be scheduled on a regular basis to prospects in New York, New Jersey and Connecticut

Activity: Participate in Marketplace '89 - 2 segments

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

Activity: New Jersey Solo Food Show - March 7, 1990
Expected Results: Introduction of 50 firms to local 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: Garden State Restaurant Show - April 1990
Expected Results: Introduction of 5 new firms to food service market in N.J.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: NEW YORK, CONSULATE GENERAL

Market: UNITED STATES OF AMERICA

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: AEROSPACE & MARINE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	17600.00 \$M	18480.00 \$M	18500.00 \$M	19000.00 \$M
Canadian Exports	110.00 \$M	115.00 \$M	115.00 \$M	120.00 \$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	1.00 %
GERMANY WEST	1.00 %
FRANCE	1.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. Aircraft systems, sub-systems and component parts
2. Electronic components and sub-systems
3. Marine equipment and services

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Strong sectoral capability in Canada
- Bilateral economic trade agreement

Factors for Canadian exports not reaching market potential:

- Strong Canadian market
-

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NEW YORK, CONSULATE GENERAL

Market: UNITED STATES OF AMERICA

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

Activity: Continue liaison program with defense contractors to promote benefits of defense sharing agreement

Expected Results: New business opportunities with U.S. primes

Activity: Participate in High Tech Conference to provide guidance to new exporters to territory

Expected Results: New business opportunities with U.S. primes

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

Activity: Defence Subcontractors Conference III, Toronto, March 1990.

Expected Results: \$10 million in sales after first year

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 local defense plants explain Subcontractor III program

Expected Results: 12 visitors from area will travel to Toronto event

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: NEW YORK, CONSULATE GENERAL

Market: UNITED STATES OF AMERICA

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: ELECTRICAL & ELECTRONIC

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	3800.00 \$M	4000.00 \$M	4200.00 \$M	4000.00 \$M
Canadian Exports	55.00 \$M	60.00 \$M	63.00 \$M	64.00 \$M
Canadian Share of Market	1.00 %	1.40 %	1.50 %	1.55 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA

95.00 %

Products/services for which there are good market prospects:

1. Navigation systems
2. Infared detector systems
3. Quartz crystals
4. Secure local area networks
5. High resolution thin film MIC's
6. Design and analysis softwear
7. UHF multi channel radio systems
8. Photonics
9. Batteries and battery chargers

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
- Competitive pricing
- Strong sectoral capability in Canada
- Bilateral economic trade agreement
- Willingness of exporters to invest/joint venture in territory

Factors for Canadian exports not reaching market potential:

- Set aside programs for Gvt purchase

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NEW YORK, CONSULATE GENERAL

Market: UNITED STATES OF AMERICA

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

Activity: CECOM Working Group Meetings
ARDEC Working Group Meetings
Expected Results: Secure research contracts for key Cdn electronics cos.

Activity: Work with CECOM, ARDEC, Watervliet Naval Station Earl & CCC to ensure Cdn cos receive bids suited to their capabilities
Expected Results: Increase Canada's defence electronics sales

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

Activity: AFCEA Regional Symposium
Expected Results: Introduce 6-8 new companies to Army electronics buyers

Activity: Arrange incoming/outgoing missions bet. CECOM & Spar, Leitz, MPB Tech, MDA Race, NRC, Litton, Telemus, Miller Elect
Expected Results: Make CECOM project leaders aware of Canadian capabilities

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: NEW YORK, CONSULATE GENERAL

Market: UNITED STATES OF AMERICA

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	28800.00 \$M	30000.00 \$M	31500.00 \$M	37500.00 \$M
Canadian Exports	66000.00 \$M	68000.00 \$M	71000.00 \$M	80000.00 \$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	64.00 %
UNITED KINGDOM	12.00 %
FRANCE	8.00 %
ITALY	6.00 %
JAPAN	5.00 %
KOREA	5.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. Software compatible with IBM-PC, Apple/Commodore
2. Software emphasizing Accounting/Financial Mgmt
3. UNIX
4. Educational and training

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
- Bilateral economic trade agreement

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NEW YORK, CONSULATE GENERAL

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
 - Lack of sustained marketing efforts
 -
-

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

Activity: Complete and refine market introduction in package to facilitate new Cdn exporters entry into the N.Y. area markets
Expected Results: Increases probability of success of new Canadian exporters

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

Activity: INFO
Expected Results: Introduce 6 new Cdn exporters to N.Y. markets

Activity: UNIX Expo
Expected Results: Introduce 10 new Cdn exporters to N.Y. markets

Activity: PC Expo
Expected Results: Introduce 15 new Cdn exporters to N.Y. markets

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

Activity: Marketplace
Expected Results: Match Canadian exporters with appropriate distributors

Activity: Better utilization of WIN to identify more Canadian suppliers of software related products
Expected Results: Match Canadian suppliers with New York area market needs

Activity: Identify New York area software users
Expected Results: Broadening our base of potential customers

Activity: Identify and evaluate applicable trade shows/seminars, etc.
Expected Results: Increase market opportunities for Canadian suppliers

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: NEW YORK, CONSULATE GENERAL

Market: UNITED STATES OF AMERICA

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	275000.00 \$M	260000.00 \$M	270000.00 \$M	275000.00 \$M
Canadian Exports	307.50 \$M	338.00 \$M	345.00 \$M	360.00 \$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

HONG KONG	7.00 %
TAIWAN	6.00 %
JAPAN	4.00 %
KOREA	4.00 %
EUROPE	2.00 %

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

Products/services for which there are good market prospects:

1. Fur garments
2. Women's wear
3. Men's wear
4. Children's wear

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NEW YORK, CONSULATE GENERAL

Market: UNITED STATES OF AMERICA

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: Follow up and evaluate buyers mission from N.Y. to Int. Womenswear Show in Montreal
Expected Results: Two new buying connections

Activity: Follow up and evaluate Canadian participation in the Int. Kids Show, New York
Expected Results: \$300,000 on site sales with projected sales of 1 million

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

Activity: Canadian group presentation at Exclusive Menswear Show in New York - January 1990
Expected Results: 10 Canadian companies exhibiting

Activity: Outerwear Show in Manitoba (buyers mission) (March 1990)
Expected Results: Recruit 10 buyers

Activity: Leathermark buyers mission to Toronto - Feb. 1990
Expected Results: Recruit 25 buyers

Activity: Continue to increase database of Canadian apparel exporters and U.S. buyers/contacts

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NEW YORK, CONSULATE GENERAL

Market: UNITED STATES OF AMERICA

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

Activity: Int. Womenswear Show buyers mission to Montreal - March 1990
Expected Results: Recruit 25 buyers

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: NEW YORK, CONSULATE GENERAL

Market: UNITED STATES OF AMERICA

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: FURNITURE & APPLIANCES

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	2600.00 \$M	2750.00 \$M	3000.00 \$M	3100.00 \$M
Canadian Exports	285.00 \$M	300.00 \$M	315.00 \$M	330.00 \$M
Canadian Share of Market	9.00 %	9.15 %	0.00 %	0.00 %

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

Major Competing Countries

Market Share

TAIWAN	0.00 %
ITALY	0.00 %
CANADA	0.00 %
MEXICO	0.00 %
PHILIPPINES	0.00 %
YUGOSLAVIA	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. Wood wall units
2. Wood bedroom furniture
3. Dining tables
4. Leather chairs and sofas
5. R.T.A. furniture
6. Metal occasional tables
7. Wood tables
8. Upholstery

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NEW YORK, CONSULATE GENERAL

Market: UNITED STATES OF AMERICA

Factors contributing to current successful Canadian exports:

- 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
- Bilateral economic trade agreement

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
- Unsuitable product
- Limited appreciation/understanding of distribution system
- Performance of local agent or representative
- _____
- _____

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

Activity: Incoming buyers mission to IIDEX '89, Toronto in November
Expected Results: 3-4 million in sales over a year

Activity: Incoming buyers mission to Toronto Furniture Show in
January 1990
Expected Results: 8-10 million in sales

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NEW YORK, CONSULATE GENERAL

Market: UNITED STATES OF AMERICA

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

Activity: Encouraging companies to exhibit at International Furniture Fair, Javits Center, May 1990

Expected Results: Secure sales agents for new companies

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: NEW YORK, CONSULATE GENERAL

Market: UNITED STATES OF AMERICA

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	5500.00 \$M	6000.00 \$M	6500.00 \$M	6700.00 \$M
Canadian Exports	20.00 \$M	30.00 \$M	50.00 \$M	50.00 \$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

EUROPEAN COMMON MARKET C	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. Medical equipment
2. Biotechnology products
3. Technology related services

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
 - Limited Canadian capabilities
 - Competition from other countries
-

30/11/89

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NEW YORK, CONSULATE GENERAL

Market: UNITED STATES OF AMERICA

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

Activity: Middle Atlantic Health Conference - Info Booth May 1990
Expected Results: Sales of more than \$4 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: Missions to/from Canada - Biotechnology
Expected Results: Introduce NJ/Cdn firms to formulate joint ventures/licensing

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: NEW YORK, CONSULATE GENERAL

Country: UNITED STATES OF AMERICA

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
Two years ago	55000.00	0.00	0.00
One year ago	61000.00	0.00	0.00
Current year	68000.00	20.00	8.00

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:

\$13 billion - Assuming Canadian interest rates remain significantly higher than U/S. (Note: 2/3 of this amount may be portfolio investment)

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

- Other USA states
- Great Britain
- Other EEC countries
- Japan
- Australia
- ASEAN countries

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

- Ministerial, VIP visits
- Call programs on U.S. corporates & intermediaries
- Seminars
- Selected Direct Mail program
- Advertising

IDP Partners and related program activities:

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: NEW YORK, CONSULATE GENERAL

Country: UNITED STATES OF AMERICA

IDP Partners and related activities cont d:

Canadian Provinces

- Seminars

Chartered Accountants

- Direct Mail/Seminars

Attorneys

- Direct Mail/Seminars

Canadian Banks/Investment Dealers

- Referrals/Seminars

Canadian Municipalities

- Client Servicing/Seminars

Pace University

- Events

Venture Capitalists

- Leads

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

- Same + language customs
- Quality of life
- Skilled labour force
- Positive economic policies
- Quebec as excellent base for Francophone operations

the following constraints:

- Levels of taxation
- Labor relations
- Market size
- Market fragmentation/hindrances to Inter-provincial trade
- Factionalism

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	HIGH

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RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: NEW YORK, CONSULATE GENERAL

Country: UNITED STATES OF AMERICA

The mission believes that the following sectors are of greatest interest to investors in its territory/country an assigned ranking A = High B = Medium C = Low

Sector	Ranking
Agriculture/Food/Fish	A
Resource Processing	B
Machinery and Equipment	A
Transportation	C
Consumer Products	C
Commercial Service	C
Computer and Communications	B
Health Care Products/Medical	B
Aerospace and Defence	B
Strategic Technologies	A

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: NEW YORK, CONSULATE GENERAL

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

Seq #	Date
Type: MISSION OUT, MINISTERIAL	
12	01/91
Event Description:	
Exposure of Canadian VIPs federal and provincial, to target sector clientele	
City	:To New York
Country	:CANADA
Investment Nature:	Portfolio
Investment Sector:	STRATEGIC TECHNOLOGIES
Event Cooperants :	
Provinces Federal Government	
Estimated Budget :	\$5,000.00
Type: SEMINAR, ABROAD	
7	11/90
Event Description:	
Budget Night	
City	:New York
Country	:UNITED STATES OF AMERICA
Investment Nature:	Portfolio
Investment Sector:	COMMERCIAL SERVICE
Event Cooperants :	
Ministry of Finance	
Estimated Budget :	\$2,500.00
8	12/90
Event Description:	
Matchmakers	
City	:Long Island, NY
Country	:UNITED STATES OF AMERICA
Investment Nature:	Greenfield Acquisition
Investment Sector:	AREOSPACE/DEFENCE
Event Cooperants :	
Provinces, Investment Canada	
Estimated Budget :	\$6,000.00

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: NEW YORK, CONSULATE GENERAL

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

Seq #	Date
Type: SEMINAR, ABROAD	
5	09/90
Event Description:	
Matchmaker	
City :New York	
Country :UNITED STATES OF AMERICA	
Investment Nature:Greenfield	
Acquisition	
Portfolio	
Investment Sector:COMPUTER/COMMUNICATIONS	
Event Cooperants :	
Provinces, Academe, Corporations	
Estimated Budget : \$2,000.00	
6	10/90
Event Description:	
Matchmaker	
City :Stamford, CT	
Country :UNITED STATES OF AMERICA	
Investment Nature:Greenfield	
Acquisition	
Investment Sector:STRATEGIC TECHNOLOGIES	
Event Cooperants :	
Investment Canada, Provinces	
Estimated Budget : \$2,000.00	
9	12/90
Event Description:	
Matchmakers	
City :New York/New Jersey	
Country :UNITED STATES OF AMERICA	
Investment Nature:Greenfield	
Acquisition	
Investment Sector:HEALTH CARE PRODUCTS/MEDICAL	
Event Cooperants :	
Provinces, Investment Canada	
Estimated Budget : \$6,000.00	

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: NEW YORK, CONSULATE GENERAL

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

Seq #	Date
Type: ENTREPRENURIAL SEMINAR	
10	02/91
Event Description: Ethnic communities	
City :To New York	
Country :UNITED STATES OF AMERICA	
Investment Nature:Greenfield Acquisition	
Investment Sector:COMMERCIAL SERVICE	
Event Cooperants :	
Law firms Dept. of External Affairs	
Estimated Budget : \$2,000.00	
Type: MISSION IN, TO INDUSTRY	
11	03/91
Event Description: Investor Mission	
City :From New York	
Country :CANADA	
Investment Nature:Portfolio	
Investment Sector:COMMERCIAL SERVICE	
Event Cooperants :	
Ministry of Finance	
Estimated Budget : \$3,000.00	
Type: DIRECT MAIL CAMPAIGN	
1	04/90
Event Description: Ongoing direct mail program especially with venture capitalists' companies	
City :Across Territory	
Country :UNITED STATES OF AMERICA	
Investment Nature:Direct Greenfield Portfolio	
Investment Sector:STRATEGIC TECHNOLOGIES	
Event Cooperants :	
Provinces	
Estimated Budget : \$40,000.00	

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: NEW YORK, CONSULATE GENERAL

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

Seq #	Date
Type: OUTCALL PROGRAM	
2	05/90
Event Description:	
Normal program of visiting prospects and ED organization	
City	:Across Territory
Country	:UNITED STATES OF AMERICA
Investment Nature:	Greenfield
	Acquisition
	Portfolio
Investment Sector:	STRATEGIC TECHNOLOGIES
Event Cooperants :	
	Corporations
Estimated Budget :	\$8,000.00
4	07/90
Event Description:	
Memberships and attendance at EDA, IDAC, AEDC, American	
Venture Capitalists	
City	:Across Territory
Country	:UNITED STATES OF AMERICA
Investment Nature:	Greenfield
	Acquisition
	Portfolio
Investment Sector:	STRATEGIC TECHNOLOGIES
Event Cooperants :	
	Economic developers
Estimated Budget :	\$5,000.00
3	06/90
Event Description:	
6 presentations to NY banks; 3 to accounting firms;	
2 to legal firms; consultant companies	
City	:New York
Country	:UNITED STATES OF AMERICA
Investment Nature:	Intermediaries
Investment Sector:	COMMERCIAL SERVICE
Event Cooperants :	
	Legal and Accounting Firms (CDN)
Estimated Budget :	\$3,000.00

Total estimated budget for all proposals: \$84,500.00

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PEMD - Proposed Government Promotional Activities 1990/91

Proposals As Of December 23/89

Post: New York, Consulate General

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Contact</u>
90/04/00	New York Metro Food Show Fair, National Stand	Agri & Food Products & Services
90/06/00	P.C. Expo Computer Show New York Fair, National Stand	Advanced Tech. Products & Services
90/09/00	Solo Food Show Albany Fair, Solo	Agri & Food Products & Services
90/09/11	Rochester Computer Business Show, Rochester Fair, National Stand	Advanced Tech. Products & Services
91/01/21	ASHRAE - Air Cond., Heating Refrigeration EXPO Fair, National Stand	Construction Industry
91/03/00	Int'l Kids Fashion Show New York Fair, National Stand	Consumer Products

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: SAN FRANCISCO

Country: UNITED STATES OF AMERICA

California with its annual production of goods & services of US\$550B, is the sixth greatest economic power in the world and still growing. Each Californian produces 14% more than its compatriots in the other states & earns 16% more. In Northern California, more specifically the San Francisco bay area, high-tech accounts for more than half the manufacturing jobs & one fifth of the region's exports. Many non manufacturing jobs are directly or indirectly dependent on high-tech as well. The area benefits from several unique economic assets-including an exceptional quality of life, world-class universities & the climate & the resources needed for innovation. All of this has produced a high level of affluence with 2.3% of the nation enjoying 3.1% of its wealth. On the down side, changing growth patterns are affecting access to job centers & fueling resistance to growth. Regional housing & transportation problems continue to be a weakening factor in the area's competitiveness, while the profile of population growth reflects the swelling of the labor ranks by less skilled immigrants. Yet the region's advantages have resulted in its becoming the country's most important high-tech manufacturing area, home to the largest number of biotech companies in the U.S. & when coupled with Southern California, the nation's largest state for defense contracts. Agriculture continues to play a very important role & with climate conditions much improved over the previous 2 yrs, both production & revenues are expected to increase significantly. Opportunities for Canada continue to abound in Northern California. In the high-tech area, Canadian firms continue to make inroads with power supplies, multi-layer circuit boards, peripherals & unique software packages. Biotechnology joint ventures in the agricultural & speciality chemicals area offer the best opportunities. The population growth along with the existing commute problem make the region ripe for sales of Cdn transportation equipment & services. Despite cuts in defense spending, the entire post territory continues to proffer major opportunities in this sector. With the desirability of nuclear power waning, & the realities of annual rainfall levels highlighting hydro limitations, the need for natural gas will remain key. The affluent California consumer market will be the focus of promotional efforts to market packaged foods & furniture.

Colorado is struggling to emerge from its worst slump in 3 decades, with reasonable prospects for success. Its strategic location at the center of the Rocky Mountain region, its excellent transportation & communications systems, & its solid resource base of oil, natural gas, minerals and prime agricultural land ensure Colorado's long term importance within the U.S. economic framework. Recent indications are that the down turn has bottomed out. Manufacturing employs 13% of Colorado's non-farm work force & provides 13% of gross state product. Main subsectors are food processing, high technology & defense. While energy was the hardest hit sector from 1982, the outlook for natural gas production is particularly good with 20% of U.S. proven & indicated reserves in the Rocky Mountain region. For the mining sector, over 50% of U.S. gold production is controlled by companies headquartered in Denver & coal production has surpassed 5 million tonnes. Service industries constitute the dominant sector, employing 80% of non-farm labor & 75% of the g.s.p. Tourism alone accounts for about \$6B in revenues. Opportunities exist in virtually all sectors of economic activity

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: SAN FRANCISCO

Country: UNITED STATES OF AMERICA

in Colorado. The soon-to-begin construction of a \$2B airport, & a new rapid transit system offer excellent potential. While cutbacks in defense spending spell caution, opportunities still exist. The September 1989 opening of the Denver satellite office will intensify our focus on the Colorado market while allowing us to give more attention to the other Mountain States, particularly Utah. For Utah, the Ogden Air Logistics Center offers opportunities in sheet metal (airframe), electronics (avionics) and high precision machining in an over \$1.5B market. Several prime defense contactors, located within 30 miles of Hill AFB, present additional opportunities in fabrication & defense & commercial electronics

Tourism Canada continues to stay strong in spite of competition from neighboring country promotions. The primary form of transportation to Canada continues to be "rubber tire" traffic for pleasure travel, while the business traffic continues to use air service. The new air service from the Denver area has opened up British Columbia, Saskatchewan and Manitoba to travellers from the Rocky Mountain region, making holidays in Canada more accessible.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 EXPORT PROMOTION PRIORITIES

Mission: SAN FRANCISCO

Country: UNITED STATES OF AMERICA

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**
Silicon Valley, headquarters for key firms in this marketplace offers good opportunities for suppliers of subcomponents for computer systems such as power supplies, connectors, boards, etc.; Colorado & Utah host many leading satellite/space communications & computer firms.
2. **EDUCATION, MEDICAL, HEALTH PROD**
Thirty percent of venture capital invested in high technology and biotechnology comes from Silicon Valley. Post is targetting the biotechnology area trade & investment promotion efforts.
3. **DEFENCE PROGRAMS, PRODUCTS, SERV**
Although US Defense Industries will be flat over the coming year, good opportunities exist in electronics, fabrication & some assembly for Cdn Subcontractors to US primes located in N. Cal, Colorado & Utah and at Ogden ALC in Utah.
4. **TRANSPORT SYS, EQUIP, COMP, SERV.**
Canadian bus manufacturers are becoming preferred suppliers to municipalities in Post territory. Canadian rail car manufacturers are competitive for proposed contracts with Honolulu, San Francisco BART and in longer term with Salt Lake City, Denver & Marin County.
5. **CONSUMER PRODUCTS & SERVICES**
No. Calif's 11M+ pop (growth projected), offers vast export potential. The SFran Bay area alone attracts 13+ million tourists yearly, spending approx US\$3,000 billion. Canadian contract furniture export here continues to expand, partic. as leading int'l architect/design cos have headquarters/offices here, and originate major orders.
6. **AGRI & FOOD PRODUCTS & SERVICE**
The sheer size of N. Calif 11+M population combined with over 13+M yearly visitors create a huge market for both retail & institutional food service products.

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

1. **ADVANCED TECH. PROD. & SERV**
2. **FOREST PRODUCTS, EQUIP, SERVICES**
3. **INDUSTRIAL MACHIN, PLANTS, SERV.**
4. **EDUCATION, MEDICAL, HEALTH PROD.**

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: SAN FRANCISCO

Market: UNITED STATES OF AMERICA

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	13500.00 \$M	13900.00 \$M	14100.00 \$M	14250.00 \$M
Canadian Exports	135.00 \$M	139.00 \$M	171.00 \$M	142.50 \$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: \$M

Major Competing Countries

Market Share

UNITED STATES OF AMERICA
EUROPE

0.00 %
0.00 %

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

Products/services for which there are good market prospects:

1. Semiprocessed & processed foods-retail specialty
2. Semiprocessed & processed foods, fd svce institutl

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

Factors for Canadian exports not reaching market potential:

- _____
- _____

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: SAN FRANCISCO

Market: UNITED STATES OF AMERICA

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

Activity: International Fancy Food & Confection Show - March 1990,
National Stand - 12 booths
Expected Results: Increased export sales; Cdn prods exposure to gourmet buyers

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

Activity: Western Restaurant Convention and Expo -8/90
12 booths
Expected Results: Inc. exports w/Cdn mfrs mktg to N.CA mkt thru local reps

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: SAN FRANCISCO

Market: UNITED STATES OF AMERICA

Sector : DEFENCE PROGRAMS, PRODUCTS, SERV

Sub-Sector: ELECTRICAL & ELECTRONIC

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	4000.00 \$M	5400.00 \$M	5250.00 \$M	5250.00 \$M
Canadian Exports	145.00 \$M	200.00 \$M	260.00 \$M	265.00 \$M
Canadian Share of Market	3.60 %	4.00 %	4.50 %	4.60 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	80.00 %
NATO, BRUSSELS	10.00 %
UNITED KINGDOM	3.00 %
GERMANY WEST	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. Printed circuit boards
2. Software
3. Systems (EW)
4. Satellite Technology
5. Computer Components
6. Castings/Forgings
7. High Precision Machining
8. Electro-electrical, Mechanical
9. Sheet Metal (Airframe)
10. Avionics (electronics)

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: SAN FRANCISCO

Market: UNITED STATES OF AMERICA

Factors contributing to current successful Canadian exports:

- 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
- Bilateral economic trade agreement
- 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
- Limited appreciation/understanding of distribution system
- Export Permits
- dfs firms unaware of cdn access to
- defense procurements

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

- Activity: Further devlp contacts w/US Defense Contractors(eletronics, fabricators in Valley(Lockheed,Westinhouse Marine,Ford,FMC)
Expected Results: Incremental Direct Sales
- Activity: Recruitment of US Defense contractors in Post territory for Cda/US Sub-Contractors Conf.III in Trnto March 90
Expected Results: Incremental Direct Sales
- Activity: Follow-up w/Cdn Cpys re:opportunities presented at Hill AFB seminars across Cda (Sept 89)
Expected Results: Source Approval/Direct Sales
- Activity: Develop individual visits program for Cdn cpys to Utah defense primes and incoming mission of Colorado primes
Expected Results: Incremental Direct Sales

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: SAN FRANCISCO

Market: UNITED STATES OF AMERICA

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

Activity: Increased calls on procurement offices in the Valley
Expected Results: Sales

Activity: Further identify sales opportunities w/defense primes in Utah
Expected Results: Incremental Sales

Activity: Further identify sales opportunities w/defense primes in Sacramento area.
Expected Results: 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: Report on ASICs

Activity: Identify sales opportunities at McClellan Air Force Base
Expected Results: Source Approval/Direct Sales

Activity: Identify sales opportunities at Pearl Harbor Naval Supply Center
Expected Results: Source approval/direct sales

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: SAN FRANCISCO

Market: UNITED STATES OF AMERICA

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

Space Station

Approximate Value: 999 M\$
Financing Source :
Contact : Santa Clara/Casey
(408) 988-8355

Hill AFB on-going procurements

Approximate Value: 750 M\$
Financing Source :
Contact : SFran/Zeisler
(415) 495-6021

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: SAN FRANCISCO

Market: UNITED STATES OF AMERICA

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	950.00 \$M	1000.00 \$M	1001.00 \$M	1002.00 \$M
Canadian Exports	220.00 \$M	250.00 \$M	275.00 \$M	276.00 \$M
Canadian Share of Market	23.00 %	25.00 %	27.40 %	27.90 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	0.00 %
JAPAN	0.00 %
GERMANY WEST	0.00 %
SCANDINAVIA	0.00 %

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

Products/services for which there are good market prospects:

1. Telecom Products (esp LANs and FDDI)
2. Test Equipment
3. Components
4. Voice Processing

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
- Willingness of exporters to invest/joint venture in territory

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: SAN FRANCISCO

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- _____
- _____

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

Activity: Telecom Mission, January 1991
Expected Results: Increased Sales

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: SAN FRANCISCO

Market: UNITED STATES OF AMERICA

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	1.50 \$M	1.75 \$M	1.90 \$M	2.00 \$M
Canadian Exports	70.00 \$M	80.00 \$M	90.00 \$M	100.00 \$M
Canadian Share of Market	4.67 %	4.57 %	4.70 %	5.00 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	90.00 %
UNITED KINGDOM	5.00 %
OTHER COUNTRIES	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. Computer Graphics
2. Operating Systems (UNIX)
3. Data Base
4. MacIntosh
5. Workstation Software

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

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: SAN FRANCISCO

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- Local Presence needed to be
- successful

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

Activity: Study of Computer software marketing techniques

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

Activity: Macworld - April'90
Expected Results: Sales and Distribution

Activity: Joint Provincial Computer Software & Peripherals Mission
Expected Results: Sales and Distribution

Activity: Wescon - Nov'90 (Provincial Participation)
Expected Results: Sales and Distribution

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: SAN FRANCISCO

Market: UNITED STATES OF AMERICA

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	5.00 \$M	5.50 \$M	5.60 \$M	0.00 \$M
Canadian Exports	100.00 \$M	105.00 \$M	107.00 \$M	0.00 \$M
Canadian Share of Market	2.00 %	2.00 %	2.10 %	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	60.00 %
JAPAN	30.00 %
EUROPE	5.00 %
KOREA	5.00 %

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

Products/services for which there are good market prospects:

1. Peripherals
2. Monitors
3. Power Supplies
4. Boards (esp. surface mount technologies)

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
- Strong sectoral capability in Canada

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- _____
- _____

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: SAN FRANCISCO

Market: UNITED STATES OF AMERICA

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

Activity: Comdex '90

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: SAN FRANCISCO

Market: UNITED STATES OF AMERICA

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	400.00 \$M	400.00 \$M	480.00 \$M
Canadian Exports	50.00 \$M	200.00 \$M	250.00 \$M	330.00 \$M
Canadian Share of Market	25.00 %	50.00 %	63.00 %	69.00 %

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

Major Competing Countries

Market Share

FRANCE	10.00 %
JAPAN	9.00 %
GERMANY WEST	8.00 %
UNITED STATES OF AMERICA	7.00 %
ITALY	1.00 %
HUNGARY	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. Light Rail Vehicles
2. Buses
3. Heavy Rail
4. Transit Telecoms
5. Components
6. Consultants

Factors contributing to current successful Canadian exports:

- Fairs and Missions support
- Trade Fair activity
- Provincial export promotion
- Canada is one of few sources of supply
- Strong sectoral capability in Canada

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: SAN FRANCISCO

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Lack of promotion and advertising
- Non-competitive financing
- Market prospects have not been adequately explored
- Performance of local agent or representative
- "Buy America"
- Regulations
- Few if any, local reps
-

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

- Activity: Continue to monitor & influence where possible decision-makers on Honolulu's Rapid Transit System
 Expected Results: Position Cdn suppliers to be awarded \$1B worth of contracts
- Activity: Continue to be source of information for Salt Lake City Light Rail Plans
 Expected Results: Est. Cdn suppliers as authorities on light rail transit
- Activity: See MUNI's procurement of automated Guideway System to completion
 Expected Results: SEL should land this \$25M contract
- Activity: Monitor Contra Costa's Transit Plans
 Expected Results: County has \$1.5B to spend on transit over next 20 years

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

- Activity: Guide Canadian Suppliers to Proper Buyers -BART, Facilitate presntatns & liaise w/ Denvr RTA officials & potential supp.
 Expected Results: Secure part of \$3B expansion for Cdn firms
- Activity: Attend Hi-speed Rail Corridor Meeting
 Expected Results: Monitor group for opportunities for Cdn suppliers
- Activity: Circulate Bus bid requests
 Expected Results: Present opport.for Cdn suppliers to bid all in timely manner
- Activity: Propose Cdn solutions for Santa Cruz test project (considering elevated or tram)
 Expected Results: This project will be very visible

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: SAN FRANCISCO

Market: UNITED STATES OF AMERICA

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

BART EXTENSIONS	Approximate Value:	3000 M\$
	Financing Source :	DOM - Domestically funded
	Contact :	Russell Rhea (415)495-6021
Honolulu Light Rail	Approximate Value:	1000 M\$
	Financing Source :	
	Contact :	
Salt Lake City & Denver Light Rail Projects	Approximate Value:	520 M\$
	Financing Source :	
	Contact :	R.Rhea - SLC 415/495-6021 Gib McEwen -Denvr 303/291-9611
MUNI Automated Track Control	Approximate Value:	25 M\$
	Financing Source :	
	Contact :	

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: SAN FRANCISCO

Market: UNITED STATES OF AMERICA

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	0.00 \$M	0.00 \$M	0.00 \$M	30.00 \$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

FRANCE	0.00 %
GERMANY WEST	0.00 %
UNITED STATES OF AMERICA	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. People-mover
2. Baggage - Handling Equipment
3. De-icing Systems
4. Runway Lighting Systems

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:

- _____
- _____

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: SAN FRANCISCO

Market: UNITED STATES OF AMERICA

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

Activity: Airport Goods & Services Mission
Expected Results: Sale of Canadian technology

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

Activity: Continue to liaise with airport officials and potential Canadian suppliers
Expected Results: Sale of Canadian technology

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

New Denver Int'l Airport

Approximate Value: 2000 M\$

Financing Source :

Contact : Gib McEwen (303)291-9611

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: SAN FRANCISCO

Market: UNITED STATES OF AMERICA

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	60.00 \$M	60.00 \$M	60.00 \$M	70.00 \$M
Canadian Exports	1.00 \$M	1.00 \$M	1.00 \$M	2.00 \$M
Canadian Share of Market	0.01 %	0.01 %	0.01 %	0.03 %

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 %

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

Products/services for which there are good market prospects:

1. Mining Software
2. Consulting Services
3. Machinery & 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:

- _____
- _____

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: SAN FRANCISCO

Market: UNITED STATES OF AMERICA

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

Activity: National Western Mining Exhibition, February 1991
Expected Results: Increased sales of Canadian goods & 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: Continue to liaise with mining companies & potential Canadian suppliers
Expected Results: Increase in market share

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: SAN FRANCISCO

Market: UNITED STATES OF AMERICA

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	185.00 \$M	200.00 \$M	220.00 \$M	230.00 \$M
Canadian Exports	9.00 \$M	12.00 \$M	17.00 \$M	18.00 \$M
Canadian Share of Market	5.00 %	6.00 %	8.00 %	8.00 %

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

Major Competing Countries

Market Share

TAIWAN	25.00 %
PEOPLE'S REP OF CHINA	20.00 %
HONG KONG	18.00 %
UNITED STATES OF AMERICA	17.00 %
THAILAND	5.00 %
MEXICO	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. Pleasure Boats
2. Camping Equipment
3. Hockey Equipment
4. Bicycles
5. Bike Accessories
6. Golf Accessoreis
7. Uniforms
8. Exercise Equipment
9. Protective Equipment
10. Diving Equipment

Factors contributing to current successful Canadian exports:

- PEMD support
- Fairs and Missions support
- Trade Fair activity
- Strong sectoral capability in Canada
- Reputation for durable

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: SAN FRANCISCO

Market: UNITED STATES OF AMERICA

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
- Non-competitive financing
- _____
- _____

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

Activity: Follow-up with sponsored buyers to CSGA Show in Montreal, Feb. 1989 & will w/1990 sponsored buyers
Expected Results: Offer appropriate units to known reps

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

Activity: Canadian Sporting Goods Assoc (CSGA) National Show, February 1991, Montreal
Expected Results: Identify re-sellers for Canadian manufacturers

Activity: CSGA Western Rep Show, September 1990, Vancouver
Expected Results: Identify re-sellers for Canadian manufacturers

Activity: Outdoor Retailer West, September 1990, Reno, Nevada
Expected Results: Demonstrate Canadian expertise in outdoor sporting goods

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

Activity: Expose firms to opportunities in winter sports, e.g. new sports -snow boarding, growing sports x-ctry skiing, luge etc
Expected Results: Capitalize reputation Cda enjoys for solid cold weather gear

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: SAN FRANCISCO

Market: UNITED STATES OF AMERICA

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: FURNITURE & APPLIANCES

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	9.00 \$M	9.00 \$M	1000.00 \$M	1100.00 \$M
Canadian Exports	60.30 \$M	66.50 \$M	90.00 \$M	100.65 \$M
Canadian Share of Market	6.70 %	7.00 %	9.00 %	9.15 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	0.00 %
TAIWAN	0.00 %
CANADA	0.00 %
ITALY	0.00 %
GERMANY WEST	0.00 %
MEXICO	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. Contract - institutional/hospitality
2. public spaces
3. hotel/motel

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
- Strong sectoral capability in Canada

Factors for Canadian exports not reaching market potential:

- _____
- _____

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: SAN FRANCISCO

Market: UNITED STATES OF AMERICA

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

Activity: IIDEX Participation, Nov. 1990

Expected Results: Increased exposure of Cdn firms results in more export 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: IIDEX invitee(86-89)Arch/designer/specifiers dinner with local sales reps. If succesful wld like to hv bi-annual evnt

Expected Results: Frthr closer ties w/N.CA sales reps for Cdn furnishings.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: SAN FRANCISCO

Market: UNITED STATES OF AMERICA

Sector : CONSTRUCTION INDUSTRY

Sub-Sector: BUILDING PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	6500.00 \$M	7369.00 \$M	7000.00 \$M	6300.00 \$M
Canadian Exports	0.70 \$M	0.90 \$M	1.00 \$M	1.30 \$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

UNITED STATES OF AMERICA

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. Residential Finished Building 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
- Competitive pricing

Factors for Canadian exports not reaching market potential:

- Limited appreciation/understanding of distribution system
- Transp.costs; Sup.qual.Cdn prods

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: SAN FRANCISCO

Market: UNITED STATES OF AMERICA

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

Activity: PCBC (June 90) Cdn mfrs w/local sales representation to exhibit (12 booths). This wld be followup to NEXUS June '89
Expected Results: Incr export; Cdn coys can compete on equal footing w/US sup.

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: SAN FRANCISCO

Country: UNITED STATES OF AMERICA

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
Two years ago	0.00	30.00	70.00
One year ago	0.00	30.00	70.00
Current year	0.00	30.00	70.00

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:

Unknown at this time.

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

- Ireland
- Scotland
- Netherlands
- Britain
- Japan

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

- Local investment offices
- Massive advertising

IDP Partners and related program activities:

- Canadian Banks
- Seminars

- Provincial government offices - LA
- Seminar

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: SAN FRANCISCO

Country: UNITED STATES OF AMERICA

Compared to major competitive destinations, Canada is perceived to have

the following advantages:

- Familiarity, language
- Already established sales offices

the following constraints:

- Fear of Europe 1992
- Lack of infrastructure for certain high tech products e.g. chips

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	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 and assigned ranking A = High B = Medium C = Low

Sector	Ranking
Agriculture/Food/Fish	A
Resource Processing	A
Machinery and Equipment	B
Transportation	B
Consumer Products	B
Commercial Service	B
Computer and Communications	A
Health Care Products/Medical	A
Aerospace and Defence	A
Strategic Technologies	A

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: SAN FRANCISCO

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

Seq #	Date
Type: MISSION IN, TO INDUSTRY	
1	09/90
Event Description: Investor/VC Biotech Mission to NRC Show City :Toronto, Montreal Country :CANADA Investment Nature:Green field Investment Sector:HEALTH CARE PRODUCTS/MEDICAL Event Cooperants : ISTC, Ontario, Quebec Estimated Budget : \$30,000.00	
Type: LOCAL PUBLICATION	
2	09/90
Event Description: Newsletter to USA Biotech industry to promote investment City : Country :UNITED STATES OF AMERICA Investment Nature:Portfolio Investment Sector:HEALTH CARE PRODUCTS/MEDICAL Event Cooperants : Banks, Provinces Estimated Budget : \$10,000.00	
Type: OTHER PROMOTION	
4	09/90
Event Description: Consulting project to match Canadian and California Biotech firms City :Toronto, Ottawa, Mtl Country :CANADA Investment Nature: Investment Sector:HEALTH CARE PRODUCTS/MEDICAL Event Cooperants : Investment Canada Estimated Budget : \$15,000.00	

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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: SAN FRANCISCO

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

Seq #

Date

Type: MEETING

3 Event Description:

12/90

Seminar to explain benefits of GST

City :

Country : UNITED STATES OF AMERICA

Investment Nature: Greenfield

Investment Sector: COMMERCIAL SERVICE

Event Cooperants :

Banks, Lawyers, Provinces
Estimated Budget : \$8,000.00

Total estimated budget for all proposals: \$63,000.00

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PEMD - Proposed Government Promotional Activities 1990/91

Proposals As Of December 23/89

Post: San Francisco

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Contact</u>
91/01/00	MAC World, San Francisco Fair, National Stand	Advanced Tech. Products & Services

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: SEATTLE

Country: UNITED STATES OF AMERICA

The overall economic outlook for the 4 states of Washington, Oregon, Idaho and Alaska has, throughout the first 6 months of 1989, continued to be very positive. While the state of Washington has generally exceeded that for the US as a whole, with the state's economy further diversifying and expanding, the other 3 states have not made any appreciable headway, and for the most part of 1989, their economies have remained at 1988 levels.

Generally, it is felt that the Federal Reserve Board's tight credit policy over the last year will continue to promote lower bank interest rates. However, the Pacific Northwest, which tends to be more capital intensive than some other regions, will probably benefit from the lower interest rates. If we use employment as one of the prime "bell weathers" to measure economical strength, the state of Washington leads five of the major Pacific Northwest states in payrolls growing in real income and employment as the strongest in territory. Retail sales have followed national trends i.e. are soft and have not kept pace with what is generally a very healthy economy.

In the coming year for the high technology sector, we see a continuing increase in the sales of personal computers and some big gains in the software industry. For the fishing industry, some uncertainties continue to nag, especially in the wake of the Alaskan oil spill. There are local concerns in Washington over the high volumes of B.C. pen-reared salmon entering the market. In aerospace, Boeing is planning to continue with production increases to meet the backlog challenge over 1,500 planes on their order books. Strong gains are expected in the heavy machinery manufacturing and heavy duty truck industry. Steel production in the area is running at higher levels than last year, reflecting to some degree the construction boom in the state of Washington. There has been growing numbers of small business start-ups in the Puget Sound market and new opportunities for small scale entrepreneurs are now on the increase. At the present time, none of the normal signs of an impending recession i.e. the leading economic indicators falling over a consecutive period of three or more months, rising interest rates, rising unemployment and dramatic turn down in the sales of durable goods, are visible within the next twelve months in the Seattle post territory.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 EXPORT PROMOTION PRIORITIES

Mission: SEATTLE

Country: UNITED STATES OF AMERICA

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.**
Boeing, the largest aircraft manufacturer in the world is located in this mission territory. They will need suppliers well into the 1990's. Excellent opportunity for aftermarket niches in automotive parts, especially with removal of tariffs under FTA.
2. **AGRI & FOOD PRODUCTS & SERVICE**
Import and specialty foods are enjoying strong popularity, increasing consumption trends and a lack of local supplies for some fish species (farmed salmon).
3. **ADVANCED TECH. PROD. & SERV**
With the largest software company in the U.S.A. located in this mission territory, supported by a diverse range of high tech companies, there are excellent niche prospects.
4. **CONSUMER PRODUCTS & SERVICES**
Good test market, and excellent entry point. Lifestyles and demands are near perfect match with Western Canada
5. **CONSTRUCTION INDUSTRY**
One of the most fast growing construction areas in the USA. Strong residential and industrial growth, affluent and expansionist environment.

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

- | | |
|--------------------------------------|-----------------------------------|
| 1. OIL & GAS EQUIPMENT, SERVICES | 4. AGRI & FOOD PRODUCTS & SERVICE |
| 2. FOREST PRODUCTS, EQUIP, SERVICES | 5. ADVANCED TECH. PROD. & SERV |
| 3. TRANSPORT SYS, EQUIP, COMP, SERV. | 6. CONSTRUCTION INDUSTRY |

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: SEATTLE

Market: UNITED STATES OF AMERICA

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	21223.00 \$M	22280.00 \$M	23000.00 \$M	25300.00 \$M
Canadian Exports	235.00 \$M	248.00 \$M	257.00 \$M	282.00 \$M
Canadian Share of Market	1.10 %	1.10 %	1.10 %	1.20 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	97.60 %
CANADA	1.10 %
JAPAN	0.23 %
NEW ZEALAND	0.20 %
THAILAND	0.16 %
FRANCE	0.11 %

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

Products/services for which there are good market prospects:

1. Gourmet and speciality foods.
2. Meat and meat bi-products.
3. Speciality beers.

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
- Persistence, committment

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Lack of persistence/committment

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: SEATTLE

Market: UNITED STATES OF AMERICA

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

Activity: Solo Food Show, Feb 89
Expected Results: 30 new companies, 60 exhibitors, 15 new agents.

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

Activity: Solo Food Show, Feb91
Expected Results: 60 exhibitors, 30 new companies, 15 new agents

Activity: Speciality Food Nebs, Sep90
Expected Results: 20 participants, 5 new broker appointments

Activity: Floriculture Nebs, Aug90
Expected Results: 20 participants, 5 new distributor appointments

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: SEATTLE

Market: UNITED STATES OF AMERICA

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	690.00 \$M	700.00 \$M	755.00 \$M	790.00 \$M
Canadian Exports	42.00 \$M	45.00 \$M	48.00 \$M	54.00 \$M
Canadian Share of Market	6.20 %	6.30 %	6.30 %	6.40 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	88.00 %
CANADA	63.00 %
KOREA	2.00 %
THAILAND	1.10 %
JAPAN	1.10 %
AUSTRALIA	0.30 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. Farmed salmon
2. On-board fishing equipment
3. On-shore processing 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
- Provincial export promotion
- Competitive pricing
- Strong sectoral capability in Canada

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: SEATTLE

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- _____
- _____

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

Activity: Fish Expo 89

Expected Results: 20 exhibitors, \$ 2 million sales projected 1st year.

Activity: Solo Food Show 90

Expected Results: 3 seafood exhibitors, \$ 50,000 sales projected 1st year.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: SEATTLE

Market: UNITED STATES OF AMERICA

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	1700.00 \$M	1700.00 \$M	1700.00 \$M	1700.00 \$M
Canadian Exports	50.00 \$M	50.00 \$M	50.00 \$M	50.00 \$M
Canadian Share of Market	3.00 %	3.00 %	3.00 %	3.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	55.00 %
ASIA OR FAR EAST	30.00 %
EUROPEAN COMMON MARKET C	5.00 %
OTHER COUNTRIES	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. Telecommunications
2. Electronics
3. Integrated circuits
4. Computer systems
5. Computer peripherals
6. 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

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: SEATTLE

Market: UNITED STATES OF AMERICA

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
 - Market prospects have not been adequately explored
 - Lack of professional follow-up
-

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

Activity: Northcon 89

Expected Results: assist 10 Canadian companies to obtain 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: Working individually with Canadian electronic, computer and software companies.

Expected Results: To obtain sales for Canadian companies.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: SEATTLE

Market: UNITED STATES OF AMERICA

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	1.29 \$M	1.39 \$M	1.53 \$M	1.68 \$M
Canadian Exports	50.20 \$M	55.78 \$M	67.32 \$M	73.92 \$M
Canadian Share of Market	3.88 %	4.00 %	4.40 %	4.40 %

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

Major Competing Countries Market Share

UNITED STATES OF AMERICA	80.00 %
JAPAN	3.00 %
MEXICO	5.20 %
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. Truck bed liners.
2. Universal catalytic converters.
3. Hand-held test equipment and diagnostics.
4. Seat covers.
5. Gas shocks and struts.
6. Video training for do-it-yourself.
7. Any "off road" accessories.
8. Safety items.
9. Any "pick-up: truck accessories.
10. Mini-van accessories.
11. Fuel efficiency items.
12. Luxury car accessories.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: SEATTLE

Market: UNITED STATES OF AMERICA

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
- Competitive Canadian financing
- Willingness of exporters to invest/joint venture in territory

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: Automotive Aftermarket Trade Show, 20 Feb 90
Expected Results: Introduce 20 new companies to the Pacific Northwest.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: SEATTLE

Market: UNITED STATES OF AMERICA

Sector : TRANSPORT SYS,EQUIP,COMP,SERV.

Sub-Sector: MARINE INDUSTRIES

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	6200.00 \$M	6840.00 \$M	6900.00 \$M	7100.00 \$M
Canadian Exports	12.20 \$M	14.50 \$M	16.00 \$M	17.00 \$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: 30-60 \$M

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	93.00 %
TAIWAN	2.00 %
ASIA OR FAR EAST	1.30 %
EUROPE	1.70 %

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

Products/services for which there are good market prospects:

1. Pleasure boats
2. Marine electronics
3. Marine components
4. Work boats

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Limited appreciation/understanding of distribution system
 - Lack of interest in W US market.
-

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: SEATTLE

Market: UNITED STATES OF AMERICA

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

Activity: Buyers missions to Vancouver and Toronto boats shows.
Expected Results: Dealers/ reps to pick-up new lines.

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

Activity: Information/exhibit booth at Seattle Boat Show.
Expected Results: Establish toe-hold for small Canadian firms.

Activity: Pacific Marine Expo, 90
Expected Results: 10 firms to exhibit

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: SEATTLE

Market: UNITED STATES OF AMERICA

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	4400.00 \$M	6500.00 \$M	7000.00 \$M	8000.00 \$M
Canadian Exports	220.00 \$M	325.00 \$M	350.00 \$M	450.00 \$M
Canadian Share of Market	5.00 %	5.00 %	5.00 %	6.00 %

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 %
EUROPEAN COMMON MARKET C	10.00 %
ASIA OR FAR EAST	5.00 %
OTHER COUNTRIES	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. Aircraft parts
2. Aircraft systems
3. Avionics
4. Electronics
5. Computers
6. Navigation equipment

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Provincial export promotion
- Competitive pricing
- Quality product delivered
- on time at competitive
- world prices.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: SEATTLE

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
 - Lack of promotion and advertising
 - Limited appreciation/understanding of distribution system
 - Lack prof follow-up w/ Boeing buyer
-

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

Activity: Manitoba Aerospace Mission, Nov 89
Expected Results: 1 company BCA qualified.

Activity: B.C. Aerospace Mission, Feb 89
Expected Results: 1 company BCA qualified.

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

Activity: Selective provincial aerospace missions.
Expected Results: Expand Canada's supplier base at Boeing.

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

Activity: Working individually with Canadian aerospace companies.
Expected Results: To get companies qualified and contracts.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: SEATTLE

Market: UNITED STATES OF AMERICA

Sector : MINE,METAL,MINERAL PROD & SRV

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	1740.00 \$M	1825.00 \$M	1900.00 \$M	2000.00 \$M
Canadian Exports	42.80 \$M	44.90 \$M	47.10 \$M	49.50 \$M
Canadian Share of Market	2.50 %	2.50 %	2.50 %	2.50 %

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

Major Competing Countries

Market Share

GERMANY WEST	10.00 %
JAPAN	20.00 %
UNITED STATES OF AMERICA	50.00 %
KOREA	7.00 %
SWEDEN	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. New plant and equipment
2. Underground machinery
3. Crushing/screening/grinding parts
4. Transportation machinery

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

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Mining slow so long that industry
- need more awareness of opport.

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: SEATTLE

Market: UNITED STATES OF AMERICA

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

Activity: Attending technical and business meeting calls on industry.

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

Activity: Northwest Mining Show 1990
Expected Results: 5 million

Activity: Alaska Mining Show 1991
Expected Results: \$1 million

Activity: Western U.S. Mining market study
Expected Results: Better perspective of market opport. for Canadian industry.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: SEATTLE

Market: UNITED STATES OF AMERICA

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	11670.00 \$M	11900.00 \$M	12140.00 \$M	12390.00 \$M
Canadian Exports	1508.00 \$M	1539.00 \$M	1570.00 \$M	1500.00 \$M
Canadian Share of Market	13.00 %	13.00 %	13.00 %	13.00 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	100.00 %

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

Products/services for which there are good market prospects:

1. Natural gas
2. Speciality petroleum products

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
- Competitive Canadian financing
- Willingness of exporters to invest/joint venture in territory

Factors for Canadian exports not reaching market potential:

- Govt export policy on oil and gas
-

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: SEATTLE

Market: UNITED STATES OF AMERICA

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

Activity: Survey of Canadian industry interest in expanding market penetration

Expected Results: Develop a joint strategy for expansion.

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

Activity: Arrange series of key executive meetings between local gas firms and Canadian gas firms.

Expected Results: Major long-term sales of natural gas.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: SEATTLE

Market: UNITED STATES OF AMERICA

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	14900.40 \$M	13800.00 \$M	14076.00 \$M	13923.00 \$M
Canadian Exports	88.80 \$M	81.00 \$M	87.30 \$M	90.50 \$M
Canadian Share of Market	0.60 %	0.58 %	0.62 %	0.65 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	58.00 %
TAIWAN	10.00 %
KOREA	10.00 %
HONG KONG	10.00 %
EUROPEAN COMMON MARKET C	4.00 %
OTHER COUNTRIES	8.00 %

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

Products/services for which there are good market prospects:

1. Office Furniture/Products
2. Printing
3. Apparel
4. Misc. other personal and household products
5. Sporting goods
6. Medical products/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
- Provincial export promotion
- Competitive pricing

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: SEATTLE

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Limited Canadian capabilities
- Performance of local agent or representative
- PNW is small region often last
- pt to expand for E. Cdn. firms.

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

Activity: Incoming buyers to IIDEX-Toronto, 09Nov89
Expected Results: \$450,000 projected 1st year sales.

Activity: Incoming buyers to Montreal Womenswear Show, Mar90
Expected Results: \$150,000 projected 1st year 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: Ontario Medical Products mission to Seattle, Spring 90
Expected Results: 8 companies, 5 new distributors.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: SEATTLE

Market: UNITED STATES OF AMERICA

Sector : CONSTRUCTION INDUSTRY

Sub-Sector: BUILDING PRODUCTS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	3.17 \$M	3.52 \$M	3.92 \$M	3.95 \$M
Canadian Exports	150.00 \$M	161.00 \$M	200.20 \$M	205.40 \$M
Canadian Share of Market	4.73 %	4.57 %	5.10 %	5.20 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	90.00 %
TAIWAN	3.00 %
CANADA	5.10 %

Products/services for which there are good market prospects:

1. Hand tools.
2. Treated wood products
3. Alternative wood products
4. Wall coverings
5. Decor products and centres
6. Software products for do-it-yourself industry

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
- Competitive Canadian financing
- Willingness of exporters to invest/joint venture in territory

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: SEATTLE

Market: UNITED STATES OF AMERICA

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: Building Products and Hardware Trade Show, 16 Jan 90
Expected Results: 20 companies introduced to the Pacific Northwest market.

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: SEATTLE

Country: UNITED STATES OF AMERICA

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
Two years ago	1100.00	36.00	50.00
One year ago	1100.00	36.00	50.00
Current year	1100.00	36.00	50.00

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:

Minimum \$ 1 billion.

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

- Other areas of the U.S.A.
- United Kingdom
- Other European Countries

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

- Publications/literature.
- V.I.P. visits to state governors.
- Meetings with Chambers of Commerce - Trade associations.
- University speaking engagements.

IDP Partners and related program activities:

Canadian banks

- Distribution of literature.

Canadian provinces

- Meeting/exchange of information.

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: SEATTLE

Country: UNITED STATES OF AMERICA

IDP Partners and related activities cont d:

Canadian legal firms

- Speaking engagements.

Local governments

- Exchange information.

Local banks

- Meetings/exchange information

Canadian municipalities

- Distribute literature/referrals

Compared to major competitive destinations, Canada is perceived to have

the following advantages:

- Proximity to Pacific Northwest States
- Exchange rates
- Common language
- Resource abundance

the following constraints:

- Provincial Controls/Limits
- Weather
- Higher salary/wage/benefits
- Smaller pool of trained staff

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	LOW
Technology Licensing	MEDIUM

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: SEATTLE

Country: UNITED STATES OF AMERICA

The mission believes that the following sectors are of greatest interest to investors in its territory/country an assigned ranking A = High B = Medium C = Low

Sector	Ranking
Agriculture/Food/Fish	B
Resource Processing	C
Machinery and Equipment	C
Transportation	B
Consumer Products	A
Commercial Service	C
Computer and Communications	A
Health Care Products/Medical	B
Aerospace and Defence	A
Strategic Technologies	B

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: SEATTLE

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

Seq #	Date
Type: SEMINAR, ABROAD	
2	03/91
Event Description:	
Breakfast seminar speaker	
City :Portland	
Country :UNITED STATES OF AMERICA	
Investment Nature:Joint Venture	
Portfolio	
Tech. licensing	
Investment Sector:MULTIPLE INVESTMENT SECTORS	
Event Cooperants :	
Financial/Business Institutions	
Estimated Budget : \$1,500.00	
4	07/90
Event Description:	
Luncheon seminar speaker	
City :Boise	
Country :UNITED STATES OF AMERICA	
Investment Nature:Joint Venture	
Portfolio	
Techn.licensing	
Investment Sector:MULTIPLE INVESTMENT SECTORS	
Event Cooperants :	
Financial/Business Institutions	
Estimated Budget : \$2,500.00	
5	10/90
Event Description:	
Breakfast seminar speaker	
City :Seattle	
Country :UNITED STATES OF AMERICA	
Investment Nature:Joint Venture	
Portfolio	
Techn.licensing	
Investment Sector:MULTIPLE INVESTMENT SECTORS	
Event Cooperants :	
Financial/Business institutions	
Estimated Budget : \$1,200.00	

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: SEATTLE

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

Seq #	Date
Type: SEMINAR, ABROAD	
3	05/90
Event Description:	
Luncheon seminar speaker	
City	:Spokane
Country	:UNITED STATES OF AMERICA
Investment Nature:	Joint Venture
	Portfolio
	Techn.licensing
Investment Sector:	MULTIPLE INVESTMENT SECTORS
Event Cooperants :	
	Financial/Business institutions
Estimated Budget :	\$2,000.00
Type: OTHER PROMOTION	
1	04/90
Event Description:	
Media advertising	
City	:U.S.A.
Country	:UNITED STATES OF AMERICA
Investment Nature:	Joint Venture
	Porfolio
	Techn Licensing
Investment Sector:	MULTIPLE INVESTMENT SECTORS
Event Cooperants :	
	Provinces
Estimated Budget :	\$100,000.00
Total estimated budget for all proposals:	\$107,200.00

DEPARTMENT OF EXTERNAL AFFAIRS

PEMD - Proposed Government Promotional Activities 1990/91

Proposals As Of December 23/89

Post: Seattle

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Contact</u>
91/03/00	Solo Food Show Seattle Fair, Solo	Agri & Food Products & Services

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 TRADE AND ECONOMIC OVERVIEW

Mission: WASHINGTON

Country: UNITED STATES OF AMERICA

Defence Programs: The defence programs section's main activity in 1989 focused on maintaining access to the US defence mkt under the CDA-US sharing programs. This involved three lines of effort A) Countering protectionist legislation in Congress; B) monitoring and countering regulatory changes within the Dept of Defense; and C) responding to individual company access problems. In view of pending legislation (Oakar & Dyson) and changes in the defence acquisition process, 1990 will again demand most of our attention. Defence market access responses were provided to over 1200 industry and government queries. Looking to 1990 one of our greatest concerns is the posting out of two of the four defence sector officers and the possibility of this being relieved by inexperienced US defence mkt specialists.

Non-Defence Govt. Procurement: Promotion of export opportunities in this mkt (particularly through cross CDA tour in Feb 89) resulted in significant increase of interest in selling to civilian departments of US govt. While US govt budgets are under much pressure and spending decreased to \$174B in 1989, there is great opportunity for innovative Cdn products, provided that solid mkt research and planning are conducted first.

Commercial TID: The Embassy's Trade and Investment Development office covers the mid-Atlantic region of the US (E. PA, MD, DE, VA, & DC). This 72,000 sq mi tier is a compact, commercially developed and highly diversified economic area which continues to undergo restructuring in traditional manufacturing and a rapid expansion in the high technology and service sectors. With a population of some 16 million (only 6% of the US total), the territory accounts for a full 9% (or C\$350B) of American personal disposable income. Two of the top five US cities in this category are from the region--greater Washington and Philadelphia. In terms of retail purchasing the mid-Atlantic accounts for 10% of the national total; the combined mkts of Baltimore and metro Washington generate C\$50B in sales annually.

Principal imports from Canada are closely related to the existing industrial infrastructure: newsprint and wood pulp, for the major newspapers and paper requirements of the government and service industries; motor vehicle parts for assembly facilities located in foreign trade zones (Chrysler in Newark DE, GM in Wilmington, and Ford in Lansdale PA); softwood lumber for booming residential and commercial construction; iron ore and aluminum for PA's heavy industry operations. Other major imported products currently being purchased from Canada include telecommunications equipment, office machines, equipment/tools, and meat products.

Sectors offering significant potential for Cdn suppliers include food and consumer products (office furniture, fashion apparel) communication/informatics equipment and services, medical apparatus, and biotechnology.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 EXPORT PROMOTION PRIORITIES

Mission: WASHINGTON

Country: UNITED STATES OF AMERICA

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
\$180B DEFENCE MKT OF WHICH CDN INDUSTRY IS ONLY CAPTURING \$1B OF A POTENTIAL \$20B AVAILABLE FOR COMPETITION

2. ADVANCED TECH. PROD. & SERV

3. CONSUMER PRODUCTS & SERVICES

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

1. ADVANCED TECH. PROD. & SERV
2. DEFENCE PROGRAMS, PRODUCTS, SERV

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: WASHINGTON

Market: UNITED STATES OF AMERICA

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	7718.00 \$M	7873.00 \$M	8030.00 \$M	8190.00 \$M
Canadian Exports	0.00 \$M	248.00 \$M	248.00 \$M	251.00 \$M
Canadian Share of Market	0.00 %	3.20 %	3.10 %	3.20 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	89.00 %
CANADA	4.00 %
BRAZIL	2.00 %
MEXICO	2.00 %
SPAIN	1.50 %
FRANCE	1.50 %

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

Products/services for which there are good market prospects:

1. ALCOHOLIC BEVERAGES
2. BAKED GOODS
3. CONFECTIONERY
4. SPECIALITY/GOURMET
5. BOTTLED WATER

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
- Canada is one of few sources of supply

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: WASHINGTON

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- 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: ONGOING EXPANSION & UPDATE OF DISTRIBUTOR/BROKER/REP NETWORK
Expected Results: PROVIDE INDUSTRY WITH RELIABLE CONTACTS TO MAXIMIZE DIST OPP

Activity: OPPORTUNITIES

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

Activity: RESTAURANT/HOSP FOODSERVICE SHOW--MARCH
Expected Results: \$1-2M EST 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: SOLO FOOD SHOW--SEPTEMBER
Expected Results: \$1-2M EST SALES

Activity: PRODUCE COMPREHENSIVE GUIDE TO MID-ATLANTIC FOOD MARKET
Expected Results: INCREASED SALES THROUGH GREATER AWARENESS OF MKTING PRACTICE

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: WASHINGTON

Market: UNITED STATES OF AMERICA

Sector : AGRI & FOOD PRODUCTS & SERVICE

Sub-Sector: AGRICULTURE MACH, EQUIP, TOOLS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	892.00 \$M	918.00 \$M	945.00 \$M	992.00 \$M
Canadian Exports	60.00 \$M	61.00 \$M	63.00 \$M	66.00 \$M
Canadian Share of Market	4.60 %	6.70 %	6.60 %	6.60 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	75.90 %
CANADA	6.60 %
JAPAN	5.70 %
ENGLAND	3.50 %
GERMANY WEST	3.30 %
ITALY	1.70 %

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

Products/services for which there are good market prospects:

1. TRACTORS
2. ROCK PICKERS
3. SOIL PREP EQUIP
4. BAILERS
5. FENCING

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
- 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: WASHINGTON

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market 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: AG PROGRESS DAYS 1990

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: WASHINGTON

Market: UNITED STATES OF AMERICA

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	20000.00 \$M	23400.00 \$M	20800.00 \$M	20000.00 \$M
Canadian Exports	128.00 \$M	114.00 \$M	114.00 \$M	112.00 \$M
Canadian Share of Market	0.05 %	0.05 %	0.05 %	0.05 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	97.00 %
EUROPEAN COMMON MARKET C	2.00 %
OTHER COUNTRIES	1.00 %

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

Products/services for which there are good market prospects:

1. ELECTRONICS ASSEMBLIES
2. MACHINING PARTS
3. ELECTRICAL WIRING
4. CASTINGS
5. AIRCRAFT COMPONENTS
6. SHIPS COMPONENTS

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- Fairs and Missions support
- Trade Fair activity
- Competitive pricing
- Strong sectoral capability in Canada
- Bilateral economic trade agreement
- Willingness of exporters to invest/joint venture in territory

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: WASHINGTON

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Restrictive quotas
- Restrictive standards
- Non-competitive pricing
- Limited appreciation/understanding of distribution system
- Limited Canadian capabilities
- BUY AMERICA
- NTL SECURITY/SBA

- _____
- _____

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: WASHINGTON

Market: UNITED STATES OF AMERICA

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	6485.00 \$M	7259.00 \$M	7985.00 \$M	8384.00 \$M
Canadian Exports	120.00 \$M	132.00 \$M	145.00 \$M	152.00 \$M
Canadian Share of Market	1.90 %	1.80 %	1.80 %	1.80 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	63.60 %
JAPAN	9.20 %
SINGAPORE	3.20 %
TAIWAN	2.50 %
CANADA	1.50 %

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

Products/services for which there are good market prospects:

1. SOFTWARE
2. HARDWARE
3. 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
- 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: WASHINGTON

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- _____
- _____

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

Activity: COMNET '90

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

Activity: COMNET 91/FEB 1991

Activity: MTS 90

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: WASHINGTON

Market: UNITED STATES OF AMERICA

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	0.00 \$M	9017.00 \$M	10798.00 \$M	11226.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.00 \$M	14.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	0.02 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	78.00 %
HONG KONG	9.00 %
TAIWAN	6.00 %
KOREA	4.00 %
PEOPLE'S REP OF CHINA	1.00 %
MEXICO	2.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. OUTERWEAR OUTDOOR JACKETS
2. DESIGNER APPAREL

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
- Bilateral economic trade agreement
- Willingness of exporters to invest/joint venture in territory
- PRODUCT QUALITY

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: WASHINGTON

Market: UNITED STATES OF AMERICA

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: SURVEY OF AREA RETAILERS/DISTRIBUTION CHANNELS FOR OUTERWEAR
& FASHION APPAREL
Expected Results: INCREASED MKT PENETRATION & SALES

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

Activity: CDN INTL WOMENSWEAR--SEPTEMBER
Expected Results: INCREASED BUYER AWARENESS AND SALES

Activity: CDN INTL WOMENSWEAR SHOW--MARCH
Expected Results: INCREASED BUYER AWARENESS AND SALES

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: WASHINGTON

Market: UNITED STATES OF AMERICA

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: FURNITURE & APPLIANCES

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	2567.00 \$M	2593.00 \$M	2619.00 \$M	2645.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	73.00 \$M	75.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	2.90 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	84.00 %
MEXICO	6.00 %
CANADA	4.00 %
ITALY	3.00 %
TAIWAN	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. OFFICE FURNITURE
2. HOUSEHOLD RTA FURNITURE
3. UPHOLSTERED HOUSEHOLD FURNITURE

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
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- Bilateral economic trade agreement
- Competitive Canadian financing

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: WASHINGTON

Market: UNITED STATES OF AMERICA

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: ESTABLISHMENT OF COMPUTERIZED DATABAS OF TERRITORY FURNITURE
REPS QUALIFIED TO HANDLE CDN LINES
Expected Results: IMPROVED BASE FOR REFERRAL & PROMOTIONAL ACTIVITIES

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

Activity: MONTREAL MKTPLACE--JUNE
Expected Results: \$2M EST. SALES

Activity: IIDEX--NOVEMBER
Expected Results: \$5.6M EST SALES

Activity: TORONTO MKTPLACE--JANUARY
Expected Results: \$2M 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: PROVIDE COMPREHENSIVE GUIDE TO MID-ATLANTIC FURNITURE MKT
Expected Results: INCREASED SALES THROUGH GREATER AWARENESS OF MKT PRACTICES

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: WASHINGTON

Market: UNITED STATES OF AMERICA

Sector : EDUCATION, MEDICAL, HEALTH PROD

Sub-Sector: PHARMACEUTICALS, BIOTECHNOLOGY

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	0.00 %
FRANCE	0.00 %
SWITZERLAND	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. DISGNOSTICS (HEALTHCARE)
2. BIOPHARMACEUTICALS
3. GENETICALLY IMPROVED CROPS/ANIMALS (AGRI.)
4. WASTE MANAGEMENT BIOENGINEERING (ENVIRO.)

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
- Willingness of exporters to invest/joint venture in territory

Factors for Canadian exports not reaching market potential:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: WASHINGTON

Market: UNITED STATES OF AMERICA

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

Activity: OUTGOING R&D/REGULATORY CONTROLS MISSION

Expected Results: INCREASE AWARENESS OF ISSUES AFFECTING REGULATORY ENVIRONMEN

Activity: T AND POTENTIAL FOR COLLABORATIVE RESEARCH

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: WASHINGTON

Country: UNITED STATES OF AMERICA

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:

MANY LARGE CORPS HEADQUARTERED IN MID-ATLANTIC STATE REGION HAVE DEVELOPED INVESTMENT STRATEGIES TAKING THE FTA INTO ACCOUNT; A NUMBER OF THESE ARE ACTIVELY UPGRADING THEIR CURRENT PRESENCE IN CANADA, A PROCESS WHICH LIKELY WILL CONTINUE IN 90/91 (ACTUAL OR EST. DOLLAR FIGURES UNKNOWN)

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

- FRANCE
- JAPAN
- NETHERLANDS
- MIDDLE EAST
- PUERTO RICO

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

- 1. PASSIVE PROMOTION (INVESTMENT DECISIONS RESULTING FROM INTERCORPORATE LINKAGES) 2. ID PROMOTION AS A COMPONENT OF GENERAL BUYING MISSIONS, ESP THOSE FROM FAR EAST COUNTRIES 3. SELECTIVELY PLACED ADVERTISING IN INDUSTRY JOURNALS

IDP Partners and related program activities:

PROVINCIAL INVESTMENT DEVELOPMENT AUTHORITIES (IE. NEW YORK BASED OFFICES OF ONT, QUE, SASK, ALTA)

- CO-SPONSORSHIP OF MAJOR ID EVENTS IN TERRITORY

SELECTED CANADIAN MUNICIPALITIES

- CO-SPONSORSHIP OF SECTOR-SPECIFIC ID INITIATIVES

INVESTMENT CANADA

- SPEECH MODULES, OTHER INFO AIDS; SPECIALIZED ADVICE; OCCASIONAL HIGH-LEVEL PROGRAM SUPPORT

CONSULATE GENERAL NYC/SENIOR INVESTMENT ADVISOR

- OCCASIONAL ASSISTANCE/SPECIALIZED ADVICE

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: WASHINGTON

Country: UNITED STATES OF AMERICA

IDP Partners and related activities cont d:

US DEPT OF COMMERCE DISTRICT OFFICE
(RICHMOND, BALTIMORE, PHILA)
- EVENT CO-SPONSORSHIP

LOCAL STATE/MUNICIPAL GOVTS
(VA, MD, PA, DE)
- EVENT CO-SPONSORSHIP

EXTERNAL AFFAIRS/UTE
- PROJECT FUNDING SUPPORT

INDUSTRY ASSNS IN TERRITORY (EG. MONTGOMERY COUNTY HIGH-TECH
COUNCIL)
- CO-SPONSORSHIP OF EVENTS

SELECTED PRIVATE SECTOR LAW FIRMS IN TERRITORY
- CO-SPONSORSHIP OF EVENTS

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

- CORPORATE LINKS ALREADY ESTABLISHED THROUGH LONG STANDING
EXPORTING ACTIVITY OR VIA PREVIOUS COMPANY INVESTMENT IN CDA
- ECONOMIC/POLITICAL STABILITY/PREDICTABILITY
- PROXIMITY TO RAW/INTERMEDIATE GOOD INPUTS
- QUALITY OF AVAILABLE LABOUR FORCE
- QUALITY OF LIFE FACTORS

the following constraints:

- LACK OF AWARENESS OF CDA AS INVESTMENT LOCATION (AMONG SME
COMPANIES); FAILURE TO UNDERSTAND/APPRECIATE CHAPTER 16 OF THE
FTA

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	HIGH
Technology Licensing	HIGH

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RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROMOTION PROFILE

Mission: WASHINGTON

Country: UNITED STATES OF AMERICA

The mission believes that the following sectors are of greatest interest to investors in its territory/country an assigned ranking A = High B = Medium C = Low

Sector	Ranking
Agriculture/Food/Fish	C
Resource Processing	A
Machinery and Equipment	B
Transportation	C
Consumer Products	A
Commercial Service	B
Computer and Communications	A
Health Care Products/Medical	A
Aerospace and Defence	A
Strategic Technologies	A

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: WASHINGTON

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

Seq #	Date
Type: MISSION OUT, ACCESS	
2	05/90
Event Description:	
ADVANCED MATERIALS NETWORKING MISSION	
City	:NEWARK, DE
Country	:UNITED STATES OF AMERICA
Investment Nature:	STRATEGIC PARTN
	ERING
Investment Sector:	STRATEGIC TECHNOLOGIES
Event Cooperants :	
	UNIVERSITY OF DELAWARE, STATE OF DE
Estimated Budget :	\$3,000.00
Type: MISSION IN, TO INDUSTRY	
3	01/90
Event Description:	
VENTURE CAPITAL MISSION TO ONT, QUE	
City	:TORONTO, MONTREAL
Country	:UNITED STATES OF AMERICA
Investment Nature:	PORTFOLIO
Investment Sector:	COMMERCIAL SERVICE
Event Cooperants :	
	TERRITORY VENTURE CAPITAL AUTHORITIES
Estimated Budget :	\$3,000.00
4	09/90
Event Description:	
MONTGOMERY COUNTY HIGH-TECH COUNCIL MISSION TO OTTAWA	
City	:OTTAWA
Country	:CANADA
Investment Nature:	STRATEGIC PARTN
	ERING/JV/GREENF
	IELD
Investment Sector:	COMPUTER/COMMUNICATIONS
Event Cooperants :	
	OTTAWA CARLETON ECONOMIC DEVELOPMENT CORP, PROV OF ONT
Estimated Budget :	\$3,000.00

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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

90/91 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: WASHINGTON

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

Seq #

Date

Type: MEETING

1 Event Description:

11/90

FINANCING US COMPANY EXPANSION OR ESTABLISHMENT IN CDA

City :PHILA, PA

Country :UNITED STATES OF AMERICA

Investment Nature:ACQUISITION/GRE
ENFIELD/JV

Investment Sector:STRATEGIC TECHNOLOGIES

Event Cooperants :

MELLON BANK

Estimated Budget : \$3,000.00

Total estimated budget for all proposals:

\$12,000.00

DEPARTMENT OF EXTERNAL AFFAIRS

PEMD - Proposed Government Promotional Activities 1990/91

Proposals As Of December 23/89

Post: Washington

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Contact</u>
90/04/00	Sea Air Space Washington Fair, National Stand	Defence Products & Services
90/06/00	AFCEA International Washington Fair, National Stand	Defence Products & Services
90/09/16	Eastern Cable T Trade Show Washington Fair, National Stand	Advanced Tech. Products & Services
90/10/00	AOC 90 Washington Fair, National Stand	Defence Products & Services
90/10/00	COMDEF 90 Washington Fair, National Stand	Defence Products & Services
91/03/00	East/South Hospitality Show Washington Fair, National Stand	Agri & Food Products & Services