

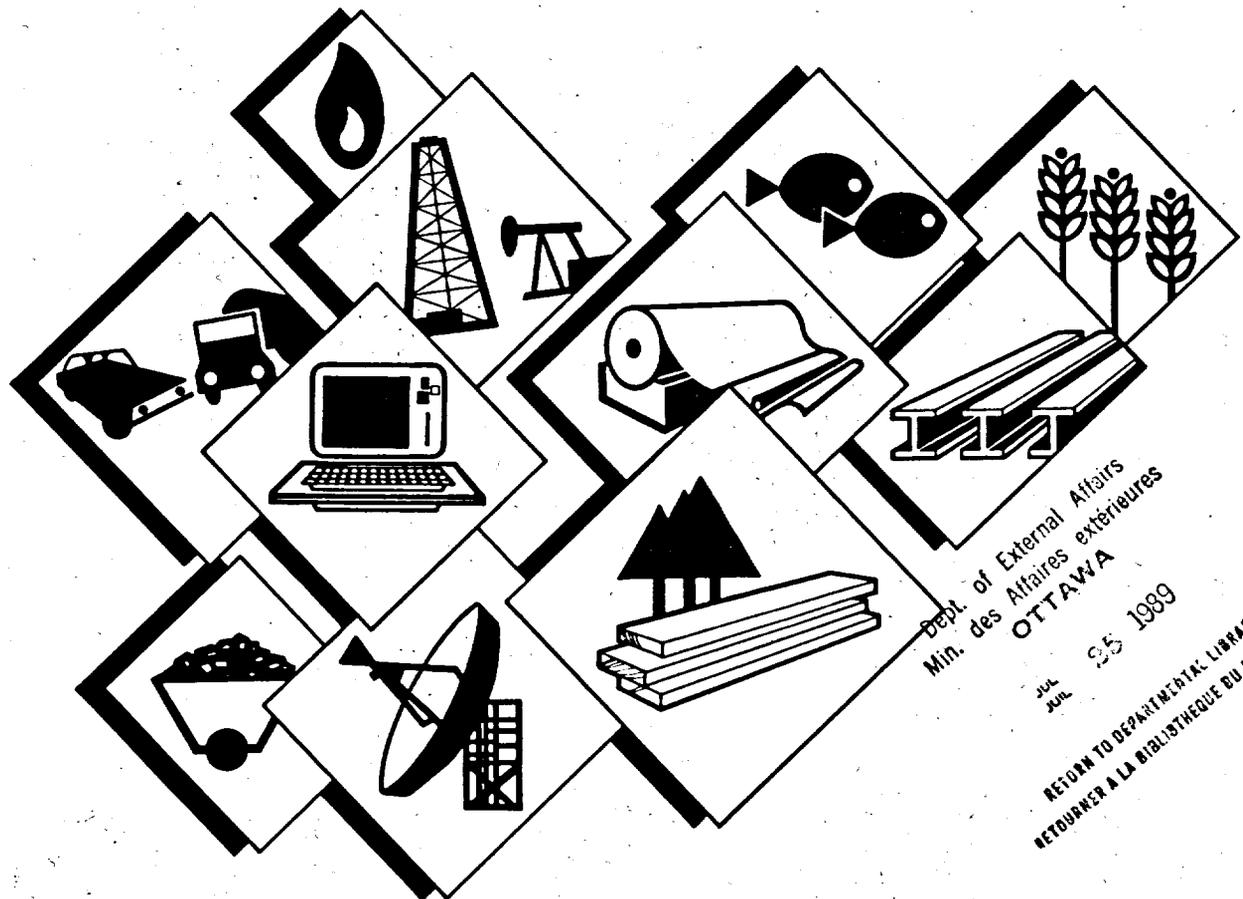


GEOGRAPHICAL SYNOPSIS

UNITED STATES

NON - CIRCULATING /
CONSULTEUR SUR PLACE

1989-90 EXPORT AND INVESTMENT PROMOTION OPERATIONAL PLAN



JUNE 1989

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

FOREWORD

This report contains a summary of the highlights of the proposed work plans of the export and investment promotion program of Canadian diplomatic missions in the United States for fiscal year 1989/90 commencing April 1, 1989.

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

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

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

The synopsis provides a trade and economic overview of each country in the region in which market prospects exist for Canadian exporters, a listing of sectorial priorities for each market, profiles of important or interesting sectors as well as approved promotional projects in support of specific program activities.

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

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

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

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

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

In addition to the geographic perspective of this report, information from the data bank is available in a variety of configurations, the most important of which are synopses of 16 sectors and a variety of market reports. Information from these reports can be obtained on request from the geographic or sectoral bureaux of the Department of External Affairs

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

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

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

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RPTBL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: ATLANTA

Country: UNITED STATES OF AMERICA

THE CANADIAN CONSULATE GENERAL IN ATLANTA SERVES THE SOUTHEASTERN STATES OF ALABAMA, FLORIDA, GEORGIA, MISSISSIPPI, NORTH CAROLINA, SOUTH CAROLINA AND TENNESSEE AS WELL AS PUERTO RICO AND THE U.S. VIRGIN ISLANDS. THIS FAR FLUNG REGION HAS AN AREA OF APPROX. 345,000 SQUARE MILES AND A POPULATION OF 42 MILLION, MAKING IT THE MOST POPULOUS OF THE CONSULATE TERRITORIES IN THE U.S.

DURING THE LAST DECADE, THE SOUTHEAST HAS BEEN THE FASTEST GROWING REGION IN THE NATION AND BY MID-1990'S WILL BE THE MOST POPULOUS. THIS GROWTH HAS BEEN DUE PRINCIPALLY TO MIGRATION FROM OTHER REGIONS BUT HAS BEEN UNEVEN THROUGHOUT THE TERRITORY. GEORGIA, THE CAROLINAS AND, PARTICULARLY, FLORIDA, HAVE SHOWN STRONG POPULATION GROWTH WHILE TENNESSEE, ALABAMA AND MISSISSIPPI HAVE GROWN MORE SLOWLY THAN THE NATIONAL AVERAGE. POPULATION GROWTH HAS BEEN ACCOMPANIED BY RAPID ECONOMIC EXPANSION. ATTRACTED BY LOWER THAN AVERAGE WAGE LEVELS, A LARGELY NON-UNION WORKFORCE (10.2%) AS WELL AS LOWER ELECTRICITY AND CONSTRUCTION COSTS, NON-DURABLE GOODS MANUFACTURING INDUSTRIES FLOCKED TO THE SOUTHERN STATES DURING THE 1970'S AND 80'S. AS A RESULT, 21.5% OF THE SOUTHEASTERN NON-AGRICULTURAL LABOUR FORCE IS ENGAGED IN MANUFACTURING, COMPARED WITH 19.1% IN THE UNITED STATES AS A WHOLE. THIS PICTURE IS CHANGING, HOWEVER, AS THE ECONOMY OF THE SOUTHEAST MATURES AND GROWTH LEVELS OFF. THE SERVICES SECTOR, WHICH HAS LAGGED WELL BEHIND MANUFACTURING, IS NOW POISED TO ASSUME THE ROLE OF LEADING EMPLOYER AS IT HAS ALREADY DONE IN THE U.S. ECONOMY AS A WHOLE. THUS THE INDUSTRY MIX OF THE SOUTHEAST IS COMING INCREASINGLY TO RESEMBLE THAT OF THE UNITED STATES.

WERE IT A SEPARATE COUNTRY, THE SOUTHEAST WOULD HAVE THE WORLD'S 6TH LARGEST ECONOMY. THIS LARGE AND GROWING MARKET PRESENTS ABUNDANT OPPORTUNITIES FOR THE SALE OF CANADIAN PRODUCTS AND SERVICES. IN 1987, CANADIAN EXPORTS TO THE REGION WERE \$6.3 BILLION ACROSS A DIVERSITY OF SECTORS LED BY MOTOR VEHICLES AND PARTS, FOREST PRODUCTS AND TELECOMMUNICATIONS EQUIPMENT. DURING 1988, CONTINUED STRENGTH IN THE CONSTRUCTION INDUSTRY WILL OFFER EXPORT MARKETS FOR LUMBER, BUILDING MATERIALS AND CONTRACT FURNITURE; THE GROWING POPULATION (INCLUDING A LARGE CANADIAN COMPONENT) WILL MEAN GROWING OPPORTUNITIES FOR THE SALE OF FOOD PRODUCTS; THE REGIONAL EMPHASIS ON TECHNOLOGY PRODUCTS OFFERS SCOPE NOT ONLY FOR THE SALE OF SYSTEMS AND COMPONENTS BUT ALSO FOR THE TRANSFER OF TECHNOLOGY. IN VIRTUALLY ALL PRODUCT SECTORS, CANADIAN EXPORTERS WHO OFFER FAVOURABLE QUALITY, PRICE, AND DELIVERY CAN BE SUCCESSFUL.

THE PUERTO RICO AND U.S. VIRGIN ISLANDS MARKET, WHILE OBVIOUSLY MUCH SMALLER THAN THAT OF THE MAINLAND, SHOULD NOT BE OVERLOOKED. IN 1987 CANADA EXPORTED OVER \$233 MILLION WORTH OF GOODS TO PUERTO RICO, NOTABLY IN THE FOOD, FOREST PRODUCTS, AUTOMOTIVE AND TELECOMMUNICATIONS SECTORS. CONTINUED STRONG ECONOMIC EXPANSION ACCOMPANIED BY A RAPIDLY RISING INCOME LEVEL MAKE THIS AN INCREASINGLY ATTRACTIVE MARKET.

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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. DEFENCE PROGRAMS, PRODUCTS, SERV
THERE ARE MANY MILITARY COMMANDS AND PRIME CONTRACTORS LOCATED IN THE TERRITORY ESPECIALLY IN FLORIDA WHICH IS THE 4TH RANKING U.S. STATE IN DEFENCE PROCUREMENT.
2. CONSUMER PRODUCTS & SERVICES
THE EXPANDING POPULATION IN THE SOUTHEAST AND RISING PERSONAL INCOMES PROVIDE A LUCRATIVE MARKET FOR MANY CONSUMER PRODUCTS, ESPECIALLY APPAREL AND FURNITURE.
3. ADVANCED TECH. PROD. & SERV
THE SOUTHEAST BOASTS AN EXPANDING HIGH TECH SECTOR WHICH REQUIRES COMPONENTS, SYSTEMS AND SOFTWARE. THE NUMBER AND VARIETY OF TRADE SHOWS OFFER GOOD OPPORTUNITIES FOR EXPORTERS TO BECOME ESTABLISHED.
4. CONSTRUCTION INDUSTRY
CONSTRUCTION ACTIVITY IN THE SOUTHEAST CONTINUES AT A RATE ABOVE THE NATIONAL LEVEL OFFERING EXCELLENT OPPORTUNITIES FOR THE SALE OF ALL TYPES OF BUILDING MATERIALS.
5. AGRI & FOOD PRODUCTS & SERVICE
A POPULATION 50% LARGER THAN CANADA, HIGH INCOME LEVELS, AND A SIGNIFICANT RESIDENT CANADIAN POPULATION (IN FLORIDA) MAKE THE SOUTHEAST AN ATTRACTIVE MARKET FOR CANADIAN FOOD PRODUCTS.
6. INDUSTRIAL MACHIN, PLANTS, SERV.
THE SOUTHEAST CONTINUES TO BE MORE ORIENTED TOWARD MANUFACTURING INDUSTRIES THAN DOES THE U.S. AS A WHOLE. THERE ARE SIGNIFICANT OPPORTUNITIES FOR ALL TYPES OF INDUSTRIAL MACHINERY.

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

- | | |
|--------------------------------------|-------------------------------------|
| 1. TRANSPORT SYS, EQUIP, COMP, SERV. | 4. INDUSTRIAL MACHIN, PLANTS, SERV. |
| 2. FOREST PRODUCTS, EQUIP, SERVICES | 5. AGRI & FOOD PRODUCTS & SERVICE |
| 3. ADVANCED TECH. PROD. & SERV | 6. CONSUMER PRODUCTS & SERVICES |

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	49200.00 \$M	50420.00 \$M	50500.00 \$M	50580.00
Canadian Exports	315.00 \$M	322.00 \$M	330.00 \$M	336.00
Canadian Share of Market	0.64 %	0.64 %	0.65 %	0.66

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. MEAT AND PRODUCTS
2. PRESERVED FRUITS
3. BAKERY 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
- CIDA programs
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: 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

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 IMPORTANT CO./PROV. GOV'T FROM MARITIMES INTO MKT
Expected Results: ENHANCE EXPORTS OF SWINE, MEAT PRODUCTS AND PRODUCE TO PR,
FL, GA MARKETS

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	2240.00 \$M	2296.00 \$M	2352.00 \$M	2412.00
Canadian Exports	178.00 \$M	183.00 \$M	187.00 \$M	192.00
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

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
- Canada is one of few sources of supply
- Strong sectoral capability in Canada

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DEPARTMENT OF EXTERNAL AFFAIRS

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

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

Activity: INTRODUCTION OF IMPORTANT CO./PROV. GOV'T FROM MARITIME INTO MKT.
Expected Results: ENHANCE EXPORT OF FISH AND SHELLFISH TO PR, FL AND GA
MARKETS

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	5610.00 \$M	5600.00 \$M	6000.00 \$M	6000.00
Canadian Exports	162.00 \$M	165.00 \$M	200.00 \$M	200.00
Canadian Share of Market	4.40 %	2.90 %	3.30 %	3.30 %

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	3.10 %
GERMANY WEST	1.60 %
FRANCE	0.90 %
ITALY	0.30 %
BELGIUM	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. MILSPEC COMPONENTS
2. SIMULATION AND TRAINING EQUIPMENT
3. AIR DEFENSE SYSTEMS
4. ELECTRONIC SUB-SYSTEMS

Factors contributing to current successful Canadian exports:

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

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: PREPARE DIRECTORY OF MARKETING REPRESENTATIVES
Expected Results: IMPROVED ACCESS TO DEFENCE PRIMES

Activity: EST. WORKING GROUP FOR JOINT DEV'T OF TRAINING/SIMULATION
Expected Results: INCREASED PARTICIPATION IN ARMY & NAVY TRAINING AND SIMULATION PROJECTS

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

Activity: CALLS TO MADE ON MILITARY COMMANDS IN TERRITORY
Expected Results: UNCOVER NEW OPPORTUNITIES FOR PRODUCTION AND DEVELOPMENT SHARING

Activity: PREPARE BRIEF-US DEFENCE PRIME CONTRACTORS ON TRADE DOCUME
Expected Results: RELIEVE IRRITANTS FOR MAJOR U.S.A. CONTRACTORS (EG. F-SYSTEMS)

Activity: WORKSHOP "HOW TO PREPARE PROF. DEFENCE CONTRACT PROPOSALS.
Expected Results: REDUCE PRIME CONTRACTOR PROBLEMS IN DEALING WITH CON SUPPLIERS, THEREBY INCREASING CON COMPONENT EXPORTS.

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ATLANTA

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	5200.00 \$M	5800.00 \$M	6336.00 \$M	7000.00
Canadian Exports	273.00 \$M	290.00 \$M	344.00 \$M	375.00
Canadian Share of Market	5.20 %	5.00 %	5.50 %	5.30

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	20.00 %
GERMANY WEST	15.00 %

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

Products/services for which there are good market prospects:

1. DATACOMM

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

Factors for Canadian exports not reaching market potential:

- KEEN COMPETITION

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ATLANTA

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	12912.00 \$M	13760.00 \$M	14200.00 \$M	15060.00 \$M
Canadian Exports	206.00 \$M	221.00 \$M	240.00 \$M	258.00 \$M
Canadian Share of Market	1.60 %	1.60 %	1.70 %	1.70 %

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	63.50 %
EUROPEAN COMMON MARKET C	15.30 %
KOREA	15.20 %

Products/services for which there are good market prospects:

1. LAN HARDWARE
2. DATACOM COMPONENTS
3. SYSTEMS COMPONENTS
4. PERIPHERALS
5. SOFTWARE

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:

- Non-competitive pricing
- Limited Canadian capabilities
- LACK OF SUBSTAINED MKT EFFORTS;
- SHORT PRODUCT LIFE CYCLES

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ATLANTA

Market: UNITED STATES OF AMERICA

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: INSTRUMENTA & PROCESS CONTROLS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	10000.00 \$M	12000.00 \$M	13600.00 \$M	14400.00 \$M
Canadian Exports	27.30 \$M	33.00 \$M	35.00 \$M	39.00 \$M
Canadian Share of Market	0.30 %	0.30 %	0.30 %	0.30 %

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	50.00 %
ASIA JR FAR EAST	30.00 %
EUROPEAN COMMON MARKET C	9.00 %

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. INSTRUMENTATION
3. COMPONENTS FOR SYSTEMS
4. PRINTED CIRCUITS

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:

- Non-competitive pricing
- Limited Canadian capabilities

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: 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	3000.00 \$M	3500.00 \$M	3500.00 \$M	4000.00 \$M
Canadian Exports	0.00 \$M	50.00 \$M	20.00 \$M	30.00 \$M
Canadian Share of Market	0.00 %	1.43 %	0.57 %	0.75 %

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 %
GERMANY WEST	10.00 %
FRANCE	5.00 %

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

Products/services for which there are good market prospects:

1. ROLLING STOCK-PASSENGER
2. SIGNAL EQUIPMENT
3. CONSULTING SERVICES

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
- Canada is one of few sources of supply
- Strong sectoral capability in Canada

Factors for Canadian exports not reaching market potential:

- MAJOR SALES DEPEND ON SPURADIC
- OCCURANCE OF LARGE PROJECTS.

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RPTCL

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: FOLLOW-UP ON 3 PREV URBAN TRANSIT MISS FM S.E. USA TO CANAL
Expected Results: EXPORT SALES AND CONSULTING CONTACTS

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

Activity: MEDIA COVERAGE IN FLORIDA ON MERITS OF URBAN TRANSIT
Expected Results: POSITIVE RESULTS IN AT LEAST 1 OF 2 MAJOR URBAN TRANSIT PROJECTS IN FLORIDA (TAMPA/ORLANDO)

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

ANCILLARY URBAN TRANSIT EQUIPMENT (SIGNALLING DEVICES) Approximate Value: 10 Ms
Financing Source : DOM - Domestically funded
Contact : R.J. BROWN/ORLANDO

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	593.00 \$M	607.00 \$M	623.00 \$M	638.00 \$M
Canadian Exports	5.50 \$M	5.60 \$M	5.70 \$M	5.90 \$M
Canadian Share of Market	0.93 %	0.92 %	0.91 %	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. MOTORBOATS
2. SAILBOATS TRAILERS
3. TRAILERS

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

Factors for Canadian exports not reaching market potential:

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

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RPTCL

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: MAILING TO LOCAL CONTACTS WITH LETTER & LATEST CATALOGUE
Expected Results: ENHANCE CDA'S IMAGE IN THE EYES OF INDUSTRY AND DEVELOP NEW BUYING CONTACTS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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 %	1.07 %	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	90.00 %
UNITED KINGDOM	2.00 %
FRANCE	2.00 %
GERMANY WEST	2.00 %
JAPAN	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. 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

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	392.00 \$M	412.00 \$M	432.00 \$M	454.00 \$M
Canadian Exports	42.00 \$M	44.00 \$M	49.00 \$M	51.00 \$M
Canadian Share of Market	10.70 %	10.70 %	11.40 %	11.30 %

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 %
WEST EUROPE	7.00 %
JAPAN	2.00 %
BRAZIL	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. LOGGING EQUIPMENT
2. SAWMILL EQUIPMENT

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	9000.00 \$M	10800.00 \$M	11700.00 \$M	12000.00 \$M
Canadian Exports	10.00 \$M	12.03 \$M	14.00 \$M	16.00 \$M
Canadian Share of Market	0.11 %	0.11 %	0.12 %	0.13 %

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 %
OTHER COUNTRIES	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

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RPTCL

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 W/BUYERS WHO ATTENDED FEST OF CDN FASH. & MONT PRET
Expected Results: \$20,000 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: IDENTIFICATION OF AGENTS AND RETAILERS
Expected Results: \$500,000 EXPORT SALES

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	2447.00 \$M	2717.00 \$M	2860.00 \$M	3000.00 \$M
Canadian Exports	12.80 \$M	14.70 \$M	15.20 \$M	22.80 \$M
Canadian Share of Market	0.52 %	0.54 %	0.53 %	0.76 %

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
- PENT support
- Fairs and Missions support
- Trade Fair activity
- Provincial export promotion
- CIAA programs
- Competitive pricing
- Strong sectoral capability in Canada

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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
- 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 CDN EXH AT SUPER SHOW ATLANTA

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ATLANTA

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	1631.20 \$M	1639.20 \$M	1960.00 \$M	2000.00 \$M
Canadian Exports	125.00 \$M	140.00 \$M	175.00 \$M	207.50 \$M
Canadian Share of Market	7.70 %	8.50 %	8.90 %	10.40 %

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 %
EAST GERMANY	0.00 %
KOREA	0.00 %
ITALY	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. CONTRACT AND OFFICE FURNITURE
2. ALL HOUSEHOLD FURNITURE, NES

Factors contributing to current successful Canadian exports:

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

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RPTCL

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: FOLLOW-UP WITH MANUFACTURERS ASSISTED IN FINDING REPS 88-89
Expected Results: \$1,000 EXPORT SALES

Activity: FOLLOW-UP W/BUYERS WHO ATTENDED TOR/MONT FURN MKTS IN 1988
Expected Results: \$500,000 EXPORT SALES

Activity: CONTINUED CONTACT WITH CON MANUFACTURERS AND REPS
Expected Results: ESTABLISH NEW BUYING CONTACTS

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

Activity: IDENT APPROP BUYERS IN THE MAJOR FURN RETAILERS IN TERRITORY
Expected Results: INCREASE MARKET FOR HOUSEHOLD 10%

Activity: RENEWAL OF CONTACTS W/STATE FURN SALESMEN'S ASS. TO IDENTIFY

Activity: SERIES OF CALLS ON SELECTED OFFICE FURNITURE DEALERS
Expected Results: INCREASE MARKET FOR OFFICE FURNITURE BY APPROXIMATELY 10%

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KPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: ATLANTA

Market: UNITED STATES OF AMERICA

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

INCOMING CONTRACT FURNITURE
MISSION

Approximate Value: 1 M\$
Financing Source : OTHER
Contact : CDN CONSULATE GENERAL, ATLANTA

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	1896.00 \$M	2992.00 \$M	2092.00 \$M	2320.00 \$M
Canadian Exports	6.60 \$M	7.00 \$M	7.50 \$M	8.80 \$M
Canadian Share of Market	0.35 %	0.35 %	0.35 %	0.40 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	75.00 %
EUROPEAN COMMON MARKET C	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 HEALTH EQUIPMENT
3. HOSPITAL EQUIPMENT

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- PEMD support
- Fairs and Missions support
- Trade Fair activity
- Provincial export promotion

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Limited appreciation/understanding of distribution system
- Limited Canadian capabilities

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: ATLANTA

Market: UNITED STATES OF AMERICA

Sector : CONSTRUCTION INDUSTRY

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	11500.00 \$M	11520.00 \$M	11600.00 \$M	12120.00 \$M
Canadian Exports	837.00 \$M	891.00 \$M	904.00 \$M	1028.00 \$M
Canadian Share of Market	7.30 %	7.70 %	7.80 %	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 %

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. SOFT WOOD LUMBER
4. CONSTRUCTION-NON-METAL
5. PRODUCTS AND EQUIPMENT

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
- Competitive pricing

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RPTCL

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 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: ORGANIZE & IMPLEMENT 3 PROMOTIONAL EVENTS TO EXPAND EX.SALES
Expected Results: ACQUIRE SIXTY NEW CONTACTS (AGENTS, REPS, ETC.), ACHIEVE DIRECT SALES OF \$75,000 AND PROJECT 1 YR SALES \$300,000.

Activity: IDENTIFY THE VARIOUS MARKETING/DISTRIBUTION CHANNELS
Expected Results: IMPROVED COUNSELLING TO CDN BUILDING MATERIALS SUPPLIERS SEEKING TO APPROPRIATELY MARKET THEIR PRODUCTS IN TERRITORY.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	17244.00 \$M	19364.00 \$M	21600.00 \$M	24000.00 \$M
Canadian Exports	288.00 \$M	352.00 \$M	399.00 \$M	535.00 \$M
Canadian Share of Market	1.70 %	1.80 %	1.90 %	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	75.00 %
EUROPEAN COMMON MARKET C	4.00 %
JAPAN	2.50 %
KOREA	2.50 %
TAIWAN	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. GENERAL MACHINERY
2. MATERIAL HANDLING AND PACKING
3. ENVIRONMENTAL
4. ELECTRICAL (T&D)
5. ENGINEER
6. INVESTMENTS
7. METAL FABRICATION
8. ROBOTIC/CAD/CAM

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEAD support
- Trade Fair activity
- Provincial export promotion
- CIDA programs

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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
- Limited Canadian capabilities

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

Activity: CONTINUE TO BUILD "CONTACT" NETWORK BOTH CDN AND S.E. U.S.A.
Expected Results: GET AN ADDITIONAL 200 CONTACTS AND ENTER INTO WIN, DIRECT SALES \$300,000

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

Activity: ORGANIZE & IMPLEMENT FIVE PROMOTIONAL EVENTS TO EXPAND SALE
Expected Results: ACQUIRE 150 NEW CONTACTS (AGENTS, REPS, ETC.) ACHIEVE DIREC SALES \$500,000 AND PROJECT ONE YEAR SALES OF \$1 MILLION

Activity: UNDERTAKE BRIEFINGS (WORKSHOPS) AT POST BETWEEN US END USER
expected Results: FIVE WORKSHOPS

RPTDL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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
Current year	6000.00	12.00	24.00
One year ago	5500.00	11.00	22.00
Two years ago	4000.00	8.00	16.00

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 (BASED ON ESTIMATE OF PREVIOUS YEARS INVESTMENT FLOWS - EXCLUDING PORTFOLIO)

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:

- EXTENSIVE HIGH QUALITY ADVERTISING CAMPAIGNS IN BUSINESS JOURNALS TO PROMOTE ADVANTAGES OF MUNICIPALITY, STATE, COUNTRY.
- HIGH LEVEL PRIVATE SECTOR MISSIONS (E.G. ORGANIZED IN COOPERATION WITH CHAMBERS OF COMMERCE FROM CITY, STATE, TO TARGETED CITY FOR MEETINGS WITH INVESTMENT INTERMEDIARIES, PRIVATE COMP. TO PROMOTE CITY/STATE (INCLUDING FORMAL RECEPTION IN TARGETED CITY W/HIGH LEVEL HOST - E.G. MAYOR OF SPONSORING
- BUSINESS FORUMS, SEMINARS HIGHLIGHTING JT. VENTURING, MERGERS, ACQUISITIONS & TECH TRANSFER OPPORTUNITIES WITH FOREIGN COUNTRY.

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: ATLANTA

Country: UNITED STATES OF AMERICA

Competitors' activities cont'd:

- MISSIONS OF INVESTMENT INTERMEDIARIES, PRIVATE COMP FROM VARIOUS COUNTRIES TO VISIT STATE/COUNTRY, SPONSORED BY STATE/COUNTRY.
- PARTICIPATION IN TARGETED TRADE SHOWS WITH COUNTRY EXHIBIT.
- SPECIAL INCENTIVE PROGRAMS (E.G. JOB CREATION TAX CREDITS, SMALL BUSINESS REVENUE BONDS)

Compared to major competitive destinations, Canada is perceived to have

the following advantages:

- STRONG ECONOMY
- ABUNDANT RESOURCES/ENERGY
- QUALITY OF LIFE
- ENTRY TO 3RD COUNTRY MKTS (ETHNIC MIX & LANGUAGE CAPABILITY)
- ENTRY TO 3RD COUNTRY MKTS (ETHNIC MIX & LANGUAGE CAPABILITY)
- BUSINESS PRACTICES SIMILAR TO U.S.A.

the following constraints:

- NORTHERN CLIMATE
- INTERPROVINCIAL BARRIERS TO TRADE

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

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RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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 with an assigned ranking of 1-10:

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

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RPTDZ

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABRDAD

Mission: ATLANTA

Country: UNITED STATES OF AMERICA

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

	Date
Type: OUTCALL PROGRAM	
PROSPECTING PILOT PRO. GEO/INDUSTRY INVESTMENT TECH TRANS- FER, ONE-ON-ONE MEETINGS (BIOTECH) Location: ATLANTA, MIAMI, RALEIG Invest Nature: GREENFIELD, JV, STRAT. PARTNER TECH. LICENSING Sector: EDUCATION, MEDICAL, HEALTH PROD Cooperants: CONSULTANT Estimated Budget: \$20,000.00	0/00
PROSPECTING PILOT PRO. GEO/INDUSTRY INVESTMENT TECH TRANS- FER, ONE-ON-ONE MEETINGS (ADVANCED MATERIALS) Location: CLEMSON, GREENVILLE, Invest Nature: GREENFIELD, JV, STRAT. PARTNER TECH LICENSING Sector: CHEM PROD & PETROCHEM, EQP, SERV Cooperants: CONSULTANT Estimated Budget: \$15,000.00	0/00
PROSPECTING PILOT PRO. GEO/INDUSTRY INVESTMENT TECH TRANS- FER, ONE-ON-ONE MEETINGS (INFORMATICS) Location: RESEARCH TRIANG. NC Invest Nature: GREENFIELD, JV, STRAT. PARTNER TECH LICENSING Sector: ADVANCED TECH. PROD. & SERV Cooperants: CONSULTANT Estimated Budget: \$15,000.00	0/00
Type: OTHER PROMOTION	
SOUTH FLORIDA-LATIN AMER./INVESTMENT Location: FLORIDA Invest Nature: PORTFOLIO, ACQUISITION, GREENFIELD Sector: MULTIPLE SECTORS Cooperants: CONSULTANT Estimated Budget: \$15,000.00	1/90

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: ATLANTA

Country: UNITED STATES OF AMERICA
Date

Type: OTHER PROMOTION

SOUTHEAST POULTRY & EGG ASSC. - INFO BOOTH & MISSION (5 COYS BIOTECH)	1/90
Location: ATLANTA, GA	
Invest Nature: JV, STRATEGIC PARTNERING TECH. LICENSING	
Sector: AGRI & FOOD PRODUCTS & SERVICE	
Cooperants: DEA, DRIE, PROV. CON INSTITUTES	
Estimated Budget: \$15,000.00	
CITEX 89 (COMPUTER IND. TECH. EXHIBITION - INFO BOOTH)	4/89
Location: ATLANTA, GA	
Invest Nature: GREENFIELD, JV, STRAT. PARTNER TECH. LICENSING	
Sector: ADVANCED TECH. PROD. & SERV	
Cooperants: DEA, DRIE, PROV. CON INSTITUTES	
Estimated Budget: \$6,000.00	
AMER. ASSC. OF CLINICAL CHEMISTS - INFO BOOTH	7/89
Location: ATLANTA, GA	
Invest Nature: GREENFIELD, JV STRAT. PARTNER TECH. LICENSING	
Sector: EDUCATION, MEDICAL, HEALTH PROD	
Cooperants: DEA, DRIE, PROV. CON INSTITUTES	
Estimated Budget: \$6,000.00	
TABES 89 (TECHNOLOGY & BUSINESS EXPO) - INFO BOOTH	4/89
Location: HUNTSVILLE AL.	
Invest Nature: JV, STRATEGIC PARTNER, TECHNOLOGY LICENSING	
Sector: DEFENCE PROGRAMS, PRODUCTS, SERV	
Cooperants: DEA, DRIE, PROV. CON INSTITUTES	
Estimated Budget: \$6,000.00	
FOLLOW-UP ON INVESTMENT LEADS GENERATED THROUGH IDP ADVERTISING CAMPAIGNS & TRADE SHOW PARTICIPATION	6/89
Location: S.E./U.S.A.	
Invest Nature: GREENFIELD STRAT. PARTNER JV	
Sector: MULTIPLE SECTORS	
Cooperants: CONSULTANT	
Estimated Budget: \$15,000.00	

30/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTDZ

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: ATLANTA

Country: UNITED STATES OF AMERICA
Date

Type: OTHER PROMOTION

WASTE EXPO INFO BOOTH

4/89

Location: ORLANDO, FLA

Invest Nature: GREENFIELD, JV,
STRAT.. PARTNER
TECH. LICENSING

Sector: CHEM PROD & PETROCHEM, EQP, SERV

Cooperants: DEA, DRIE, PROV. CON INSTITUTES

Estimated budget: \$6,000.00

PHARMACEUTICAL SCIENTISTS ASSC. EXPO - INFO BOOTH

0/00

Location: ATLANTA, GA

Invest Nature: GREENFIELD, JV,
STRAT. PARTNER
TECH LICENSING

Sector: EDUCATION, MEDICAL, HEALTH PROD

Cooperants: DEA, DRIE, PROV. CON INSTITUTES

Estimated budget: \$6,000.00

Total estimated budget for all proposals: \$125,000.00

Post : ATLANTA

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Post/Contact</u>
89/04/08	17TH ANNUAL FOOD & FOOD SERVICE EQUIP. TRADE SHOW, S. JUAN, P.R. INFO BOOTH, WITH GROUP	AGRI & FOOD PRODUCTS & SERVICE J. DUNDON
89/06/18	FOREST PROD. MACH. & EQUIP. EXPO GEORGIA WORLD CONGRESS CENTER INFO BOOTH, WITH GROUP	FOREST PRODUCTS, EQUIP, SERVICES G. T. PHILLIPS
89/09/00	SOLD CONSTRUCTION/BUILDING MATERIALS SHOW, S. J., P. RICO FAIR, SOLD	CONSTRUCTION INDUSTRY
89/10/25	CARIBECUM'89, SAN JUAN, PUERTO RICO INFO BOOTH, ONLY	ADVANCED TECH. PROD. & SERV J. DUNDON
89/11/01	NAT'L SPA & POOL INSTITUTE NSPI- SHOW ORLANDO FAIR, NATIONAL STAND	CONSUMER PRODUCTS JOSEPH COGNE
89/11/17	NAT'L. HOME HEALTH CARE EXPO. ATLANTA GEORGIA FAIR, NATIONAL STAND	EDUCATION, MEDICAL, HEALTH PROD E. WANG
90/01/19	THE BUILDERS SHOW ATLANTA FAIR, NATIONAL STAND	CONSTRUCTION INDUSTRY M. SAMSUN
90/02/12	ASHRAE-INTL AIR COND.-HEATING-REFRIGERATING EXPO, ATLANTA FAIR, NATIONAL STAND	POWER & ENERGY EQUIP & SERV. M. SAMSUN

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: BOSTON

Country: UNITED STATES OF AMERICA

TWO WAY TRADE BETWEEN CANADA AND THE FIVE NEW ENGLAND STATES (N.E.) IN THIS TERRITORY (MASSACHUSETTS, NEW HAMPSHIRE, RHODE ISLAND, MAINE AND VERMONT) REACHED \$10.7 BILLION IN 1987, LARGER THAN BILATERAL TRADE BETWEEN CANADA AND ANY OTHER COUNTRY, EXCEPT FOR JAPAN. CANADIAN EXPORTS INCREASED 12.5% TO REACH \$7.1 BILLION AND IMPORTS INCREASED 18% TO REACH \$3.6 BILLION. THE COMPOSITION OF OUR TRADE REMAINED ESSENTIALLY THE SAME WITH THE LARGEST EXPORTS BEING FORESTRY PRODUCTS (\$1.7b), SEAFOOD (\$1.1b), TRANSPORTATION EQUIPMENT (\$850M) AND ADVANCED TECHNOLOGY PRODUCTS (\$530M). OUR MAJOR IMPORTS WERE ADVANCED TECHNOLOGY PRODUCTS (\$1.4b) AND FORESTRY PRODUCTS (\$275M). WHILE ECONOMIC GROWTH HAS NOW SLOWED IN N.E., THIS REGION IS STILL EXPANDING FASTER THAN THE COUNTRY AS A WHOLE. AVERAGE INCOME IN N.E. REMAINS ALMOST 20 PERCENT HIGHER THAN THE NATIONAL AVERAGE FUELING SIGNIFICANT CONSUMER DEMAND. THE 3.3 UNEMPLOYMENT RATE REMAINS WELL BELOW THE 5.6 NATIONAL AVERAGE. THESE IMPRESSIVE FIGURES HOWEVER, HIDE A WORRYING LONG TERM ECONOMIC VARIABLE. N.E. POPULATION IS GROWING AT A MUCH SMALLER RATE THAN THE NATIONAL AVERAGE. SOME 150,000 NEW JOBS WILL BE CREATED IN NON-MANUFACTURING SECTORS, WHILE 10,000 JOBS WILL BE LOST IN MANUFACTURING WHICH STILL GENERATES ALMOST 27% OF THE N.E. REGIONAL PRODUCT COMPARED TO 22% FOR THE U.S. GNP. THE MOST IMPORTANT RECENT STIMULANT TO THE N.E. ECONOMY IS THE DECLINE IN THE U.S. DOLLAR'S EXCHANGE RATE AND THE RESULTING POSITIVE IMPACT ON EXPORTS FROM THE U.S.

DEFENCE SPENDING REMAINS CRITICAL TO THE CONTINUED GROWTH, MASSACHUSETTS-BASED COMPANIES RECEIVED \$10.5B IN 1987, ABOUT THREE TIMES THE NATIONAL AVERAGE ON A PER CAPITA BASIS. ANY REDUCTION IN DEFENCE SPENDING BY THE NEW BUSH ADMINISTRATION IS UNLIKELY TO AFFECT SERIOUSLY N.E. DEFENCE PRIME CONTRACTORS. THE OTHER MAJOR INDUSTRIAL SECTOR, ADVANCED TECHNOLOGY PRODUCTS, AND PARTICULARLY WORKSTATION/MINI-COMPUTER MANUFACTURING, IS EXPERIENCING SIGNIFICANTLY SLOWER GROWTH. SOME COMPANIES ARE EVEN INCURRING LOSSES. THREE MAJOR INFRASTRUCTURE PROJECTS WILL SUSTAIN HIGH LEVEL CONSTRUCTION ACTIVITIES: THE BOSTON HARBOR CLEAN-UP PROJECT (\$7.5 BILLION), THE CENTRAL ARTERY/THIRD BOSTON HARBOR TUNNEL (\$3.78) AND INTERSTATE 93 INTERCONNECTION (\$600 MILLION). RESIDENTIAL CONSTRUCTION IS EXPECTED TO DECLINE BY 5%. BOSTON REMAINS THE LARGEST MEDICAL CENTER IN THE U.S. IN THE BIOTECHNOLOGY SECTOR, 85 COMPANIES ARE LOCATED WITHIN AN HOUR OF DRIVING FROM BOSTON AND SEVERAL OF THESE COMPANIES ARE GETTING CLOSER TO COMMERCIALIZING PRODUCTS. OPPORTUNITIES EXIST FOR MARKETING MEDICAL PRODUCTS AND ESTABLISHING STRATEGIC ALLIANCES WITH BIO-TECH COMPANIES. CANADA REMAINS THE LARGEST SUPPLIER OF FISH IN THE N.E. MARKET AND PRICES HAVE GENERALLY STOPPED THEIR DOWNWARD TREND. THE AVAILABILITY OF HIGH QUALITY AND COMPETITIVELY PRICED SEAFOOD PRODUCTS SHOULD ALLOW CANADIAN COMPANIES TO INCREASE THEIR EXPORTS. N.E. IS FACING A SEVERE ELECTRICITY SHORTAGE. BROWNOUTS OCCURRED DURING THE SUMMER OF 1988 AND WILL CONTINUE FOR THE FORESEEABLE FUTURE. COMPANIES ARE CONSIDERING BUILDING THEIR OWN COGENERATION FACILITIES AND EXAMINING CAREFULLY ANY EXPANSION PLAN.

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTBL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: BOSTON

Country: UNITED STATES OF AMERICA

CANADA IS A SUPPLIER OF MAJOR PORTIONS OF N.E. ENERGY AND A KEY PLAYER IN REGIONAL ENERGY SECURITY. CURRENTLY HYDRO QUEBEC AND NEW BRUNSWICK POWER SUPPLY 4.6% OF THE ELECTRIC LOAD (\$490M EXPORTS). THIS PERCENTAGE WILL DOUBLE WHEN THE HYDRO QUEBEC II PROJECT COMES ON LINE IN 1990-91. GAS PROJECT (90,00 MCFPD) AND FORM THE BASIS FOR COGENERATION PROJECTS (OCEAN STATE) AND MAJOR NEW PIPELINE PROPOSALS (IROQUOIS AND CHAMPLAIN). IN ADDITION, NOVA SCOTIA COAL IS BEING CONSIDERED FOR A 1200 MW UNDER-WATER CABLE PROJECT. OIL FROM THE "CUME-BY-CHANCE" REFINERY (80,000 BPD) SUPPLIES THE GULF NETWORK IN NEW ENGLAND.

RPT92

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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. DEFENCE PROGRAMS, PRODUCTS, SERV
 - NEW ENGLAND FIRMS PLAY MAJOR ROLE IN THE MANUFACTURING OF DEFENCE ELECTRONIC, AEROSPACE & MARINE PRODUCTS.
 - NEW ENGLAND HI-TECH FIRMS WILL BENEFIT FROM EQUIPMENT UPGRADES DESPITE DECLINING DEFENCE BUDGET.
 - USAF ELECTRONIC SYSTEMS DIVISION HAS \$48 US R&D BUDGET.
2. EDUCATION, MEDICAL, HEALTH PROD
 - BIOTECH INDUSTRY IN REGION IS WORLD CLASS, SECOND ONLY TO CALIFORNIA IN THE NUMBER OF DEDICATED CO. IN THE U.S. -BIOMEDICAL INDUSTRIES IN THE REGION ARE KEY TO THE REGION'S COMPETITIVE STRENGTH IN INTL MARKETS. -REGION LEADS IN THE US BIOMEDICAL R&D BASE WITH 9 MEDICAL SCHOOLS & 46 MAJOR TEACHING HOSPITALS.
3. CONSTRUCTION INDUSTRY
 - INDUSTRY CONTINUES TO GROW AT A STEADY PACE.
 - A STRONG DEMAND CONTINUES ON PRE-BUILD HOMES.
 - MAJOR RECONSTRUCTION OF BOSTON CENTER & HARBOR CLEANUP, OVER (US\$) 13 BILLION TO BE SPENT.
4. ADVANCED TECH. PROD. & SERV
 - ADVANCED TECHNOLOGY PRODUCTS MARKET IS LARGE & MATURING. LEADERS IN THE FIELD, SUCH AS DEC, PRIME, WANG, CONTROL DATA & APOLLO ARE HQ NEAR MIT. STRONG GROWTH IS EXPECTED AT THE HIGH PERFORMANCE END OF THE DESKTOP MARKET, ESPECIALLY IN WORKSTATION MKT SECTOR. SALES OF MICRO-COMPUTERS ARE ALSO EXPECTED TO GROW IN NEAR FUTURE.
5. CONSUMER PRODUCTS & SERVICES
 - TERRITORY HAS ONE OF THE HIGHEST PER CAPITA INCOMES IN THE U.S.
 - DISPOSABLE INCOME GROWING FASTER THAN NATIONAL AVERAGE.
 - U.S. BUYER INTEREST IN CDN CONSUMER GOODS INCREASING BECAUSE OF FTA INTEREST.
6. FISHERIES, SEA PRODUCTS & SERV.
 - SEAFOOD CONSUMPTION CONTINUES TO GROW.
 - COMPETITION FROM USA AND OTHER COUNTRIES IS VERY STRONG.
 - POTENTIAL IS GREAT FOR PROCESSED AND SPECIALTY SEAFOODS.

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. FISHERIES, SEA PRODUCTS & SERV. | 5. MINE, METAL, MINERAL PROD & SRV |
| 3. TRANSPORT SYS, EQUIP, COMP, SERV. | 6. POWER & ENERGY EQUIP. & SERV. |

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	7000.00 \$M	7100.00 \$M	7200.00 \$M	7300.00 \$M
Canadian Exports	113.40 \$M	106.70 \$M	110.00 \$M	113.00 \$M
Canadian Share of Market	1.60 %	1.50 %	1.50 %	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	95.00 %
OTHER COUNTRIES	3.50 %

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

Products/services for which there are good market prospects:

1. NATURAL FOODS - NO PRESERVATIVES
2. BEVERAGES
3. MICRO-WAVE FOODS

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

Factors for Canadian exports not reaching market potential:

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

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTCL

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 FROM CO'S VISIT TO ALTA CDA. SEVERAL COMP TO EXHIB
Expected Results: ESTABLISH 6-10 NEW AGENTS OR DISTRIB OF ATLANTIC CDA FOOD PRODUCTS

Activity: FOLLOW-UP CO'S VISIT TO FOOD PAC VNCVR. 4-5 COMP TO EXHIBIT
Expected Results: ESTABLISH 5-6 NEW AGENTS OR DISTRIB OF B.C. FOOD PRODUCTS

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 COMP & PRODUCTS TO US MKTS

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

Activity: OFFICER RESPONSIBLE FOR SECTOR TO VISIT QUEBONT FOOD PROCESS
Expected Results: INCREASE NUMBER OF EXPORT COMP BY 7 OR 8

Activity: FOLLOW-UP & REPORT RESULTS OF BOSTON SOLO SHOW 89
Expected Results: ADD NEW EXPORTERS TO WIN SYSTEM

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	1750.00 \$M	1960.00 \$M	2000.00 \$M	2100.00 \$M
Canadian Exports	190.00 \$M	195.00 \$M	200.00 \$M	200.00 \$M
Canadian Share of Market	11.00 %	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. SHRIMP
2. LOBSTER
3. CRAB
4. MUSSELS
5. 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

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing

30/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	5100.00 \$M	7600.00 \$M	9130.00 \$M	10004.00 \$M
Canadian Exports	66.30 \$M	98.90 \$M	140.00 \$M	180.00 \$M
Canadian Share of Market	1.30 %	1.30 %	1.50 %	1.70 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	93.20 %
UNITED KINGDOM	2.50 %
GERMANY WEST	1.10 %
FRANCE	1.00 %
ITALY	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. RADIOS
2. PRINTED CIRCUIT BOARDS
3. INTEGRATED CIRCUITS
4. POWER SUPPLIES
5. CABLES & HARNESSSES

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Limited Canadian capabilities
- BUY AMER. & OTHER LE
- -GISLATIVE PROVISION

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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: NEW BULLETIN

Expected Results: BROADER INFORMATION ON NEW ENGLAND MKT FOR CDA 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: PROMOTE CDN ROLE IN ADI

Expected Results: GAIN GREATER ACCESS TO USAF RAND D BUDGET

Activity: COMPANY PROSPECTING IN WESTERN CANADA

Expected Results: FIND 10 NEW FIRMS FOR MKT..

Activity: FOLLOW-UP NB & ATL. DEF MISS W/INCOMING BUYERS MISSIONS

Expected Results: ESTABLISH FIRM RELATIONSHIP FOR 10 COMPANIES IN MKT.

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BOSTON

Market: UNITED STATES OF AMERICA

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

AIR DEFENCE INITIATIVE

Approximate Value: 2000 M\$

Financing Source : OTHER

Contact : W.J. SANFORD

SPACE DEFENCE INITIATIVE

Approximate Value: 1000 M\$

Financing Source : OTHER

Contact : W.J. SANFORD

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BOSTON

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	2.20 \$M	2.80 \$M	3.60 \$M	4.80 \$M
Canadian Exports	104.00 \$M	151.00 \$M	198.00 \$M	225.00 \$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	91.00 %
GERMANY WEST	2.00 %
ISRAEL	1.00 %
UNITED KINGDOM	4.00 %
FRANCE	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. SHIP, 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
- PEMU support
- Fairs and Missions support
- Trade Fair activity
- Bilateral economic trade agreement
- willingness of exporters to invest/joint venture in territory

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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 TO SUB-CONTRACTORS II CONFERENCE
Expected Results: BETWEEN \$500,000 & \$1 MILLION BUSINESS INFLUENCED.

Activity: FOLLOW-UP TO NB DEFENCE MISSION
Expected Results: INTRODUCE 3 NEW FIRMS TO MKT.

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

Activity: START QUARTERLY DEFENCE REPORT
Expected Results: PROVIDE MORE TIMELY INFORMATION TO CDN DEFENCE PRODUCT EXPORTERS.

Activity: INCREASE FREQUENTLY OF VISITS TO PRIME DEFENCE CONTRACTORS
Expected Results: PROVIDE MORE TIMELY INFORMATION TO CDN DEFENCE PRODUCT EXPORTERS.

Activity: RECRUIT 10 NEW FIRMS FOR SUB-CONTRACTORS III CONFERENCE
Expected Results: GENERATE 5 NEW BUSINESS RELATIONSHIPS.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	5575.00 \$M	6465.00 \$M	7500.00 \$M	8700.00 \$M
Canadian Exports	36.00 \$M	49.00 \$M	74.00 \$M	84.00 \$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	80.00 %
JAPAN	3.00 %
GERMANY WEST	3.00 %
UNITED KINGDOM	1.00 %
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. LANGUAGE SOFTWARE
2. FINANCIAL SOFTWARE
3. LEGAL SOFTWARE
4. DATABASE MANAGEMENT

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- PEAR support
- Fairs and Missions support

Factors for Canadian exports not reaching market potential:

- Limited appreciation/understanding of distribution system

30/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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KPTC1

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 w/11 CDN EXHIBITORS NORTHEAST COMPUTER FAIR OCT 88
Expected Results: ESTABLISH TWO DISTRIBUTION 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: IDENTIFY KEY PUBLISHERS FOR CDN SOFTWARE COMPANIES
Expected Results: GET 4 CDN COMPANIES LISTED.

Activity: WORK W/BOSTON COMPUTER SOC TO HAVE CDN FIRMS DEMONSTRATE
Expected Results: HAVE 3 CDN COMPANIES MAKE PRESENTATIONS AT BOSTON COMPUTER SOCIETY.

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	11170.00 \$M	11340.00 \$M	11510.00 \$M	11683.00 \$M
Canadian Exports	223.40 \$M	226.80 \$M	230.20 \$M	233.60 \$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

Products/services for which there are good market prospects:

1. LADIES APPAREL
2. MENS' APPAREL

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
- Unsuitable product
- Non-competitive financing
- Limited Canadian capabilities
- LACK OF PREPARATION FOR EXPORTING

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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 REPORTING ON 1988 CDN FESTIVAL OF FASHION
Expected Results: FOUR LOCAL STORES NEWLY BUYING CDN PRODUCTS

Activity: FOLLOW-UP REPORTING ON 1988 MONTREAL PRET
Expected Results: TWO LOCAL STORES NEWLY BUYING CDN PRODUCTS

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

Activity: PROM INCREASED PARTICIPATION BY INCOMING BUYERS IN CDN SHOWS
Expected Results: ADDITIONAL 20 FIRMS INTRODUCED TO CDN SUPPLIERS

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BOSTON

Market: UNITED STATES OF AMERICA

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: JEWELRY & GIFTWARE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	855.50 \$M	915.00 \$M	974.00 \$M	1037.00 \$M
Canadian Exports	17.10 \$M	18.30 \$M	19.40 \$M	20.70 \$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:

- EXTREMELY COMPETITIVE, LOCAL IND.&
- MUCH LOWER PRICING FR OTHER COUNTRY

30/05/89

DEPARTMENT OF EXTERNAL AFFAIRS

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RPTCL

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 1988 NEBS COMPANIES
Expected Results: 10 CDN COMPANIES BEGIN EXPORTING

Activity: FOLLOW-UP CDN COMPANIES IN TERRITORY 1988 TRADE SHOWS
Expected Results: 5 CDN COMPANIES BEGIN EXPORTING

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 ON TOUR OF N.S. CRAFTS
Expected Results: PROSPECT 5 COMPANIES FOR NEW ENGLAND MKT

Activity: CDN CRAFTS INCOMING SOLO MISSION JAN. 1990
Expected Results: EXPOSE 15 COMPANIES TO NEW ENGLAND MKT

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	2650.00 \$M	2880.00 \$M	3110.00 \$M	3358.00 \$M
Canadian Exports	132.50 \$M	144.00 \$M	155.50 \$M	167.90 \$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

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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 US BUYERS TO IDEX 1988
Expected Results: \$3M SALES VOLUME

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

Activity: PROSPECT CDN FIRMS
Expected Results: INCREASE KNOWLEDGE OF CDN FIRMS

Activity: INCOMING SOLD CONTRACT FURNITURE SHOW - JAN. 1990
Expected Results: INTRODUCE 10 FIRMS TO MKT

Activity: EXPAND NUMBER OF US BUYERS TO IDEX 1989
Expected Results: INCREASE SALES VOLUME FROM IDEX

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	890.00 \$M	1000.00 \$M	1108.00 \$M	1242.00 \$M
Canadian Exports	0.03 \$M	0.06 \$M	0.13 \$M	0.31 \$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	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

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Limited Canadian capabilities
- Market prospects have not been adequately explored

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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 W/NE PARTICIPANTS IN THE MTL URBAN COMMUNIBIOTECH.
Expected Results: DETERMINE IF PROGRAM FORMAT IS SUITABLE FOR BIOTECHNOLOGY COMPANIES FROM OTHER PROVINCES.

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

Activity: BASED ON 88-89 MISSIONS, MEET WITH INTERESTED NEW ENGLAND
Expected Results: ASSIST IN SUPPORTING ONE JOINT-VENTURE

Activity: DEVELOP GOOD WORKING RELATIONS WITH STAFF AT MASS. CENTRE
Expected Results: IMPROVE SOURCE OF INFORMATION ON BIOTECH ACTIVITIES IN MASS.

Activity: DETERMINE NEED FOR MKT STUDY OF BIOTECH PROD IN NEW ENGLAND
Expected Results: ASSIST TWO COMPANIES IN ESTABLISHING REPRESENTATION

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	2000.00 \$M	2160.00 \$M	2325.00 \$M	2500.00 \$M
Canadian Exports	13.00 \$M	10.00 \$M	6.60 \$M	6.60 \$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	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. SURGICAL GLOVES
2. ALL DISPOSABLE PRODUCTS
3. MEDICAL & SURGICAL INSTRUMENTS
4. CAT SCANNERS
5. ULTRASOUND SCANNERS
6. GENERAL RADIOGRAPHIC DIAGNOSTIC EQUIP.
7. PHYSIOLOGICAL MONITORING SYSTEMS
8. MOBILE RADIOGRAPHIC EQUIP.

Factors contributing to current successful Canadian exports:

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

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RPTCL

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 is planning to undertake the following new export support initiative(s) in this sector/sub-sector:

Activity: CONTRACT FOR MEDICAL EQUIP MKT STUDY IN NEW ENGLAND UNDER
Expected Results: IDENTIFY AREA OF PRIORITY FOR MKT DEVELOPMENT

Activity: ESTABLISH REPRESENTATION FOR CDN MEDICAL DEVICE COMPANIES
Expected Results: CONCLUDE 2 REPRESENTATION AGREEMENTS

Activity: CONVINCING LGE GROUP BUY ORGANIZATION OF MEDICAL PROD/SERVICES
Expected Results: GET 4 NEW CDN COMPANIES LISTED

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	7080.00 \$M	7420.00 \$M	7765.00 \$M	8300.00 \$M
Canadian Exports	72.40 \$M	141.90 \$M	155.00 \$M	195.00 \$M
Canadian Share of Market	1.10 %	1.90 %	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	95.00 %
JAPAN	1.00 %
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 HOUSING
2. WINDOWS & DOORS
3. CABINETRY

Factors contributing to current successful Canadian exports:

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

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: 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 N.S. NEBS MISSION TO BIG SHOW MAR/88 - 6 N.S. COMP
Expected Results: ESTABLISH 5-6 NEW AGENTS OR DISTRIBUTORS OF N.S. CONST MATERIALS.

Activity: FOLLOW-UP ATLA CNA NEBS MISS TO BUILD BOSTON EXPO IN NOV 88
Expected Results: ESTABLISH 4-5 NEW AGENTS OR DISTRIBUTORS OF CDN CONST. MATERIALS

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 ENG. PRE-BUILT HOUSING MKT
Expected Results: INCREASE KNOWLEDGE OF MKT SIZE TO INCREASE CDN EXPORTS

Activity: PROMOTE PARTICIPATION OF NEBS MISSIONS TO NEW ENGLAND.
Expected Results: INCREASE BY 10-20 THE NUMBER OF CDN EXPORT COMPANIES.

Activity: EXPAND DISTRIB. OF INFORMATION ON TRADE SHOWS I.E. NORTHEAST
Expected Results: INCREASE VISIBILITY OF CDN COMPANIES & PRODUCTS.

Activity: ESTABLISH INFO BOOTH FOR NEW EXPORTERS, NORTHEAST CONST EXPO
Expected Results: INTRODUCE 6 NEW FIRMS TO NEW ENGLAND MKT & COLLECT MKT INFO.

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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 still in the planning stage which provide opportunities for Canadian suppliers:

MAJOR RECONST. OF BOSTON
CENTRAL ARTERY

Approximate Value: 37000 M\$
Financing Source : OTHER
Contact : J. MCMANUS

THIRD TUNNEL FROM BOSTON
LOGAN AIRPORT

Approximate Value: 2000 M\$
Financing Source : OTHER
Contact : J. MCMANUS

BOSTON HARBOUR CLEAN UP

Approximate Value: 75000 M\$
Financing Source : OTHER
Contact : J. MCMANUS

RPT01

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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
Current year	9000.00	20.00	10.00
One year ago	10000.00	20.00	10.00
Two years ago	9000.00	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:

ABOUT THE SAME AS THIS YEAR - \$1.8 TO \$2.0 BILLION WITH MOST INVESTMENTS BEING PORTFOLIO.

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

- OTHER STATES (PARTICULARLY SOUTH EASTERN STATES)
- IRELAND
- FEDERAL REPUBLIC OF GERMANY
- U.K. (INCLUDING SCOTLAND)

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

- PUBLICITY BY OTHER JURISDICTIONS IN SPECIALIZED PRESS (LIKE N. E. EDITION OF WSJ, MASS HIGH TECH)
- BUSINESS DELEGATIONS FROM THREE GERMAN PROVINCES/BERLIN HAVE COME TO BOSTON TO MAKE PRESENTATIONS.

RPT01

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: BOSTON

Country: UNITED STATES OF AMERICA

Compared to major competitive destinations, Canada is perceived to have

the following advantages:

- LOWER LANDS VALUES
- FINANCIAL INCENTIVES (FED/PROV/MUNI)
- SKILLED LABOUR AVAILABLE
- QUALITY OF LIFE

the following constraints:

- LIMITED R & D BASE
- SMALL DOMESTIC MARKET

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

Type of Investment	Potential
Portfolio	HIGH
Acquisition	MEDIUM
Greenfield	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 with an assigned ranking of 1-10:

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

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RPT02

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABOARD

Mission: BOSTON

Country: UNITED STATES OF AMERICA

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

	Date
Type: SEMINAR, ABOARD	
PRESENTATIONS BY CDN MANUFACTURERS OF MEDICAL DEVICES	11/89
Location: RTE 128	
Invest Nature: JOINT VENTURE STRATEGIC PART.	
Sector: EDUCATION, MEDICAL, HEALTH PROD	
Cooperants:	
Estimated Budget: \$5,000.00	
Type: DIRECT MAIL CAMPAIGN	
CONTACT 200 COMPANIES TO PROMOTE JOINT VENTURES/STRATEGIC ALLIANCES	1/90
Location: NEW ENGLAND	
Invest Nature: JOINT VENTURE STRATEGIC PART.	
Sector: ADVANCED TECH. PROD. & SERV	
Cooperants: MASS HI-TECH COUNCIL	
Estimated Budget: \$4,000.00	
Type: OUTCALL PROGRAM	
INDIVIDUAL CALLS FOLLOWING FEB 89 BIOTECH SEMINAR IN BOSTON	11/89
Location: CAMBRIDGE RTE 128	
Invest Nature: JOINT VENTURE TECH. LICENSING	
Sector: EDUCATION, MEDICAL, HEALTH PROD	
Cooperants: MASS BIO-TECH COUNCIL	
Estimated Budget: \$1,000.00	
Total estimated budget for all proposals:	\$10,000.00

89/05/12 RP-A10 PEMD - Government Initiated Activities 1989

65A)

Post : BOSTON

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Post/Contact</u>
90/02/28	SOLID FOOD SHOW, BOSTON FAIR, SOLID	AGRI & FOOD PRODUCTS & SERVICE
90/03/00	BOSTON SEAFOOD SHOW INFO BOOTH, ONLY	FISHERIES, SEA PRODUCTS & SERV.
90/03/13	NORTHEAST CONSTRUCTION EXPO BOSTON FAIR, NATIONAL STAND	CONSTRUCTION INDUSTRY M. JAMESON

59/05/12 RP-A10 PEMO - Government Initiated Activities 1989

65B)

Post : BOSTON

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Post/Contact</u>
59/04/13	SEAFOOD OUTLOOK '89, SAINT JOHN'S, NFLU MISSION IN, TO INDUSTRY	FISHERIES, SEA PRODUCTS & SERV. GAIL COTE

RPTBL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: BUFFALO

Country: UNITED STATES OF AMERICA

THE UPSTATE REGION ENCOMPASSES 39 COUNTIES IN NORTHERN NEW YORK INCLUDING THE MAJOR METROPOLITAN AREAS OF BUFFALO, ROCHESTER, SYRACUSE, AND BINGHAMTON. WITH A POPULATION OF MORE THAN 4 MILLION PEOPLE, THE UPSTATE NEW YORK MARKET LIES WITHIN A 500 MILES RADIUS OF 50 PERCENT OF ALL U.S. MANUFACTURING ACTIVITY. NO OTHER REGION IN THE U.S. CAN BOAST OF TWO VITAL ADVANTAGES WITH ITS NORTHERN NEIGHBOR: ITS GEOGRAPHIC PROXIMITY TO CANADA AND A BUSINESS COMMUNITY THAT IS GEARED TOWARD WORKING WITH CANADIAN COMPANIES. OUR NEW EXPORTERS TO BORDER STATES: -NEBS PROGRAM HAS SERVED TO TRAIN MORE THAN 1300 COMPANY REPRESENTATIVES IN THE PAST FOUR YEARS, PERHAPS THE MOST SUCCESSFUL EXPORT TRAINING GOVERNMENT PROGRAM YET ESTABLISHED.

UPSTATE NEW YORK'S ECONOMY HAS SHIFTED FROM A BLUE COLLAR TYPE AREA TO A SERVICE AREA OVER THE PAST DECADE. UNIVERSITIES, BANKS, LAW FIRMS, RETAIL TRADE AND CONSULTING SERVICES ARE THE MAINSTAY OF THE LOCAL ECONOMY. UNEMPLOYMENT IS LESS THAN 5%, A POINT LOWER THAN LAST YEAR. PRICES ARE GENERALLY LOWER IN THIS AREA COMPARED TO THE REST OF THE U.S. AND THE COST OF DOING BUSINESS IS CORRESPONDINGLY LOWER. NEW YORK STATE IS THE NINTH LARGEST ECONOMIC POWER IN THE WORLD. THERE ARE ALSO FEW LOCATIONS IN THE U.S. MORE IDEALLY SUITED TO INTERNATIONAL TRADE THAN UPSTATE NEW YORK. SITUATED ON THE BORDER WITH CANADA, THIS REGION HAS ONE DAY TRUCKING ACCESS TO THE FOLLOWING MARKET RESOURCES: 49% OF ALL U.S. SKILLED WORKERS; 50% OF THE TOTAL U.S. AND CANADIAN POPULATION - 131 MILLION PEOPLE; 62% TOTAL GNP POPULATION - 15.5 MILLION PEOPLE; 52% OF THE TOTAL PERSONAL INCOME IN THE U.S. AND CANADA - \$1.4 TRILLION A YEAR; 52% OF ALL U.S. PROFESSIONAL AND TECHNICAL WORKERS; 53% OF U.S. WHOLESALE SALES; 77% OF CANADIAN MANUFACTURING ACTIVITY.

HIGHWAY AND RAIL BRIDGES IN THE REGION PROVIDE THE ONLY DIRECT FREIGHT ROUTES INTO CANADA BETWEEN DETROIT IN THE WEST AND OTTAWA IN THE EAST. THE REGION IS SERVED BY INTERNATIONAL AIRPORTS AND HAS SHIPPING ACCESS TO THE REST OF THE WORLD THROUGH THE ST. LAWRENCE SEAWAY.

CANADIAN SALES OPPORTUNITIES EXIST IN ALL TYPES OF CONSUMER PRODUCTS, INFORMATICS, ENERGY, NATURAL RESOURCES AND INDUSTRIAL COMPONENTS. THE MAJOR INDUSTRIAL FIRMS INCLUDE KODAK, XEROX, IBM, FISHER PRICE TOYS, GENERAL MOTORS, CORNING GLASS AS WELL AS DEFENCE RELATED COMPANIES SUCH AS GENERAL ELECTRIC, SIERRA RESEARCH, BELL AEROSPACE, AND MUUG. BUFFALO ALSO HAS ONE OF THE LARGEST COMPUTER SERVICE FIRMS (COMPUTER TASK GROUP) AND SOFTWARE DISTRIBUTOR (INGRAM SOFTWARE) IN THE U.S. SOME 500 CANADIAN FIRMS USE BUFFALO AS A DISTRIBUTION CENTER FOR THE U.S. MARKET. CANADIAN EXPORTS TO NEW YORK STATE OVER THE LAST FIVE YEARS HAVE GROWN AT AN AVERAGE OF 15.7% PER YEAR COMPARED TO AN AVERAGE ANNUAL INCREASE OF 11% FOR CANADIAN EXPORTS TO THE U.S. OVER THE SAME TIME PERIOD.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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. ADVANCED TECH. PROD. & SERV
SIMILAR QUALITY STANDARDS AND/OR FASHIONS.
3. CONSUMER PRODUCTS & SERVICES
TARIFFS SCHEDULED FOR ELIMINATION 89-01-01.

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

- | | |
|--------------------------------------|------------------------------------|
| 1. TRANSPORT SYS, EQUIP, COMP, SERV. | 4. MINE, METAL, MINERAL PROD & SRV |
| 2. MINE, METAL, MINERAL PROD & SRV | 5. POWER & ENERGY EQUIP. & SERV. |
| 3. FOREST PRODUCTS, EQUIP, SERVICES | 6. OIL & GAS EQUIPMENT, SERVICES |

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BUFFALO

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	10000.00 \$M	10200.00 \$M	10500.00 \$M	10700.00 \$M
Canadian Exports	484.00 \$M	572.00 \$M	630.00 \$M	650.00 \$M
Canadian Share of Market	4.80 %	5.60 %	8.00 %	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	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. FISH
3. BEER
4. FRESH PRODUCE
5. FOOD SERVICE PRODUCTS

Factors contributing to current successful Canadian exports:

- Import duties are moderate
- Import duties are low
- 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
- CLOSE PROXIMITY TO BORDER
- AND UPSTATE NEW YORK
- MARKET.

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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
- FDA, USDA, FISH AND
- WILD LIFE AGENCY.

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

Activity: IN-STORE FOOD PROMOTION
Expected Results: INCREASED EXPOSURE FOR CANADIAN PRODUCTS AND INTRODUCTION OF NEW PRODUCTS.

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

Activity: SOLO FOOD SHOW
Expected Results: 1-2 MILLION IN SALES; 50-70 PARTICIPATING 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: NEW YORK STATE RESTAURANT SHOW
Expected Results: INCREASED EXPOSURE FOR CANADIAN PRODUCTS.

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BUFFALO

Market: UNITED STATES OF AMERICA

Sector : ADVANCED TECH. PRD. & SERV

Sub-Sector: COMPUTERS HARD/SOFTWARE & COMP

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	400.00 \$M	415.00 \$M	430.00 \$M	445.00 \$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 PERIPHERALS
3. COMPUTER SERVICES

Factors contributing to current successful Canadian exports:

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

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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 (IE
- 30% COMPATIB LIMITS)
- CDN FIRMS MUST SPECIALIZE IN SPECIF
- NICHES TO SUCCEED.

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

Activity: ONGOING UPDATE OF MANUFACTURER'S REPS IN TERR FOR COMP SOFT
Expected Results: LIST WILL GREATLY ASSIST PARTICIPANTS AT COMPUTER SHOW.

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

Activity: ROCHESTER COMPUTER SHOW
Expected Results: INCREASE THE NUMBER OF ACTIVE AGENTS IN AREA AND INCREASED CANADIAN PENETRATION.

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: BUFFALO

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	6500.00 \$M	7000.00 \$M	7400.00 \$M	7800.00 \$M
Canadian Exports	85.00 \$M	117.00 \$M	149.00 \$M	200.00 \$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 %
TAIWAN	15.00 %
KOREA	12.00 %

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

Products/services for which there are good market prospects:

1. OUTERWEAR, MBWGCI
2. SWEATERS
3. DRESSES/SKIRTS

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Import duties are high
- Non-competitive pricing
- Lack of promotion and advertising
- Non-competitive financing
- Market prospects have not been adequately explored

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: BUFFALO

Market: UNITED STATES OF AMERICA

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 NEW YORK CITY.

Activity: ARE SMALL REG SHOWS, SEVERAL X/YR FOR MNS, WMS, & CHLD'S WEAR
Expected Results: INCREASED PENETRATION TO UPSTATE NEW YORK MARKET.

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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
Current year	80.00	25.00	65.00
One year ago	90.00	30.00	65.00
Two years ago	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
- PORTUGAL
- SPAIN
- JAPAN-ASIA/PACIFIC RIM

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 (IRELAND, PORTUGAL).
- FINANCIAL INCENTIVES (PORTUGAL).
- PROXIMITY TO MAJOR MARKETS (IN CASE OF EEC, JAPAN).

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: BUFFALO

Country: UNITED STATES OF AMERICA

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

- LOWER PRODUCTION COSTS IN CERTAIN AREAS.
- ACCESS TO U.S. MARKET STABLE SKILLED LABOUR FORCE
- ACCESS TO U.S. MARKET STABLE SKILLED LABOUR FORCE
- ACCESS TO U.S. MARKET STABLE SKILLED LABOUR FORCE

the following constraints:

- ELECTORAL/FREE TRADE UNCERTAINTY.
- LABOUR SHORTAGES/HIGH COSTS, HIGH LIVING/LAND COSTS IN
- LABOUR SHORTAGES/HIGH COSTS, HIGH LIVING/LAND COSTS IN

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	LOW
Strategic Partnering	MEDIUM
Technology Licensing	LOW

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

Sector	Ranking
Agriculture/Food/Fish	5
Consumer Products	5
Commercial Service	5
Computer and Communications	5
Health Care Products/Medical	5
Aerospace and Defence	5
Strategic Technologies	5

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: BUFFALO

Country: UNITED STATES OF AMERICA

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

	Date
Type: SEMINAR, ABROAD	
2 DAY SEMINAR COVERING ALL FACETS OF CANADA/USA ECONOMIC ACTIVITY. Location: BUFFALO Invest Nature: GENERAL RELATING TO INV Sector: MULTIPLE SECTORS Cooperants: CAN-AM BUSINESS COUNCIL Estimated budget: \$1,000.00	4/89
EXTENSIVE SEMINAR FEATURING MUNICIPALITIES IN NIAGARA REGION Location: BUFFALO Invest Nature: GEN FOR NIAGARA Sector: MULTIPLE SECTORS Cooperants: NIAGARA REGION DEVT. CORP. Estimated Budget: \$1,000.00	4/89
Type: OUTCALL PROGRAM	
CALL ON SELECTED HIGH TECH FIRMS. Location: SYRACUSE/UTICA/BUFF. Invest Nature: GREENFIELD TECH PARTNERSHIPS Sector: MINE, METAL, MINERAL PROD & SRV Cooperants: Estimated budget: \$1,000.00	0/89
CALL ON SELECTED HIGH TECH FIRMS. Location: ROCHESTER Invest Nature: GREENFIELD TECH PARTNERSHIPS Sector: FOREST PRODUCTS, EQUIP, SERVICES Cooperants: Estimated budget: \$1,000.00	0/89
CALL ON SELECTED HIGH TECH FIRMS. Location: BUFFALO Invest Nature: GREENFIELD TECH PARTNERSHIPS Sector: POWER & ENERGY EQUIP. & SERV. Cooperants: Estimated budget: \$0.00	0/89

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RPTDZ

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: BUFFALO

Country: UNITED STATES OF AMERICA
Date

Type: OTHER PROMOTION

SPEAKING ENGAGEMENT

11/89

Location: ROCHESTER

Invest Nature: GENERAL

Sector: MULTIPLE SECTORS

Cooperants: C OF C

Estimated budget: \$200.00

SPEAKING ENGAGEMENT.

10/89

Location: SYRACUSE

Invest Nature: GENERAL

Sector: MULTIPLE SECTORS

Cooperants: C OF C

Estimated Budget: \$200.00

Total estimated budget for all proposals:

\$4,400.00

89/06/12 RP-A10 PEMU - Government Initiated Activities 1989 77A)

Post : BUFFALO

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Post/Contact</u>
89/09/00	SOLO FOOD FAIR, BUFFALO FAIR, SOLU	AGRI & FOOD PRODUCTS & SERVICE

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RPT81

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: CHICAGO

Country: UNITED STATES OF AMERICA

MIDWEST ECONOMIC PERFORMANCE IN 1988/89 WAS GENERALLY IN STEP WITH NATIONAL PERFORMANCE. EMPLOYMENT LEVELS WERE AT RECORD HIGHS. LED BY EXPORT SALES, THE ECONOMIES OF ILLINOIS, MISSOURI AND WISCONSIN APPEARED HEALTHY - BUT THERE WERE SOME WORRYING SIGNS. A NUMBER OF INDICATORS (E.G. FACTORY ORDERS, HOME SALES, BUSINESS SPENDING FOR PLANTS AND EQUIPMENT, RETAIL SALES) ARE SLOWING AND IT WOULD APPEAR THAT THE NATIONAL ECONOMY IS LOSING STEAM. THE MIDWEST WOULD FEEL THE FULL IMPACT OF ANY NATIONAL RECESSION SUCH AS SOME OBSERVERS ARE PREDICTING FOR 1990.

LAST YEAR WE REPORTED LOWER INTEREST RATES, CONSUMER BUOYANCY, AND STRONG MARKETS FOR HOUSING, CONSUMER SERVICES, RETAILING, AND CONSTRUCTION TRADES. THIS YEAR THE OPPOSITE IS TRUE. IN ADDITION, A NUMBER OF MIDWEST CORPORATIONS, SUCH AS KRAFT, SEARS, AND MOTOROLA, ARE DEVOTING MUCH ENERGY TO THE TAKEOVER GAME AND BOTH PERSONAL AND CORPORATE DEBT ARE RISING AS RAPIDLY HERE AS ELSEWHERE. COMMERCIAL REAL ESTATE REMAINS SOFT.

THERE ARE SOME POSITIVE SIGNS AS WELL. THE FARM ECONOMY HAS SURVIVED THE SEVERE DROUGHT WITH SURPRISINGLY LITTLE DAMAGE AND WHILE A REPEAT OF THE DROUGHT WOULD HAVE SERIOUS CONSEQUENCES FOR THE MIDWEST ECONOMY, A NORMAL YEAR WOULD HAVE A POSITIVE EFFECT. MIDWEST PERSONAL INCOME WHICH HAS LAGGED IN THE 1980'S, IS NOW STARTING TO CATCH UP WITH THE TWO COASTS. MANUFACTURING IS AT ITS HIGHEST CAPACITY UTILIZATION SINCE 1980. WHILE CONTINENTAL BANK IS STILL RECOVERING FROM ITS RECENT DIFFICULTIES, THE FINANCIAL INDUSTRY GENERALLY, INCLUDING THE MAJOR CHICAGO EXCHANGES, IS HEALTHY.

THE MIDWEST ECONOMY FOR 1989/90 WILL PROBABLY EXPERIENCE SLOWER GROWTH BUT WILL BE AT OR PERHAPS SLIGHTLY ABOVE THE NATIONAL AVERAGE THANKS TO THE ORIENTATION TOWARD EXPORTS.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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 MKT IN THE U.S., IT'S 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 & BEVERAGES ARE VIRTUALLY RECESSION-PROOF & WILL GROW SLOWLY BUT STEADILY OVER THE NEXT 10 YRS. PRODUCTS THAT APPEND TO THE DIET/FITNESS/HEALTH CONC. WILL BE THE STRONGEST GROWTH. CHICAGO IS A MAJOR DISTRIBUTION/WHOLESALE CENTRE & HAS MAJOR RETAIL MKT. 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.

4. DEFENCE PROGRAMS, PRODUCTS, SERV

THE DEFENCE MARKET IN THE TERRITORY IS ESTIMATED AT \$30 BILLION. SALES OF CAN. DEFENCE PRODUCTS IN 1987 TOTALLED \$206 MILLION. THE CONFIRMATION OF THE U.S. ARMY'S LIGHT HELICOPTER PROGRAM PRESENTS OPPORTUNITIES FOR ADDITIONAL SALES OF SUBSYSTEMS AND COMPONENTS.

5. TRANSPORT SYS, EQUIP, COMP, SERV.

UPCOMING CONTRACTS IN BOTH ST. LOUIS & CHICAGO FOR URBAN TRANSIT PROJ. PROVIDE IMPORTANT UPPORT. TO CON VEHICLE MANUFACTURERS. CHICAGO IS A MAJOR CENTER FOR PLEASURE CRAFT. THERE IS A VIGOROUS & GROWING "AFTERMARKET" FOR POWER & SAILBOATS IN THIS TERRITORY. CANADIAN PRODUCTS ARE WELL REGARDED.

6. ADVANCED TECH. PROD. & SERV.

CHICAGO IS IN TOP FOUR OF U.S. VIS-A-VIS ELECTRONICS, SOFTWARE, RESEARCH AND DEVELOPMENT, ROBOTICS IN PARTICULAR & IN HIGH TECH INDUSTRIES IN GENERAL. CANADIAN SOFTWARE, PERIPHERALS & DATA COMMUN. EQUIPMENT CAN COMPETE WELL.

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

- | | |
|--------------------------------------|--------------------------------------|
| 1. OIL & GAS EQUIPMENT, SERVICES | 4. FOREST PRODUCTS, EQUIP, SERVICES |
| 2. TRANSPORT SYS, EQUIP, COMP, SERV. | 5. TRANSPORT SYS, EQUIP, COMP, SERV. |
| 3. FOREST PRODUCTS, EQUIP, SERVICES | 6. TRANSPORT SYS, EQUIP, COMP, SERV. |

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	2400.00 \$M	2500.00 \$M	2500.00 \$M	2600.00 \$M
Canadian Exports	25.00 \$M	25.00 \$M	25.00 \$M	25.00 \$M
Canadian Share of Market	0.10 %	0.10 %	0.10 %	0.10 %

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	0.00 %
AUSTRALIA	0.00 %
CANADA	0.00 %
NEW ZEALAND	0.00 %
DENMARK	0.00 %

Products/services for which there are good market prospects:

1. BEEF - LEANER/BETTER CUTS
2. PROK - PRECOOKED
3. GOURMET - CONTROLLED ATMOSPHERE
4. RETURN PACKAGING

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

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RPTCL

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: AS FOLLOW UP TO PREV INITI, WILL CONT TO RESPOND TO TRADE IN
Expected Results: ACTION TO CANADIAN/15 LOCAL INQUIRIES.

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 LOCAL QUE OFFICE EXH AT AMER MEAT INSTIT SHOW, SEPT.

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	34000.00 \$M	36000.00 \$M	40000.00 \$M	42000.00 \$M
Canadian Exports	211.00 \$M	218.00 \$M	225.00 \$M	231.00 \$M
Canadian Share of Market	0.60 %	0.60 %	0.70 %	0.70 %

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	0.00 %
EUROPEAN COMMON MARKET C	30.00 %
CANADA	15.00 %

Products/services for which there are good market prospects:

1. VALUE-ADDED ITEMS - PREPARED FOODS
2. BEVERAGE - PACKAGED JUICES, BOTTLED WATERS
3. "REAL" DAIRY PRODUCTS

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Import duties are low
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Trade Fair activity
- Provincial export promotion
- Competitive pricing

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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: INITIATE A SERIES OF ONE-ON-ONE MEETINGS w/INST FOOD DISTRIB
Expected Results: DEVELOPMENT OF MINI-MARKET GUIDE; 10 OUT CALLS.

Activity: FOLLOW UP TO PREV INITI, (FOOD PACIFIC 88 INTERVIEWS)
Expected Results: ACTION 50 CANADIAN/100 LOCAL INQUIRIES.

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

Activity: TASTE OF CAN SOLO FOOD SHOW 'JOINT FED/PROV PRDG 60 CO 03/90
Expected Results: 25 REP/BROKER AGREEMENTS MADE LOCALLY. PROJECTED 12 MONTH SALES 3 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: FOOD MKT INSTITUTE SHOW, 8 CU., NATIONAL STAND, MAY 1989
Expected Results: 25 REP/BROKER AGREEMENTS NATIONALLY PROJECTED 12 MONTH SALES 3 MILLION.

Activity: ASSESS LOCAL FOOD MKT TO DETER NECESS FORMAT FOR CREATING
Expected Results: DEVELOPMENT OF IN-STORE RETAIL PROMOTION IN CHICAGO.
INCREASED PUBLICITY & VISIBILITY FOR CDN FOOD INDUSTRY.

Activity: IDENTIFY ALL TRADE SHOW OPPORTUNITIES HOSTED IN POST TERRIT
Expected Results: DEVELOPMENT OF COMPREHENSIVE REFERENCE MANUAL OF REGIONAL AND NATIONAL ABOVE.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	7000.00 \$M	7400.00 \$M	7500.00 \$M	7650.00 \$M
Canadian Exports	110.00 \$M	115.00 \$M	116.00 \$M	118.00 \$M
Canadian Share of Market	1.60 %	1.60 %	1.50 %	1.50 %

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. TECH ADVANCED BALERS,FORAGE HARVESTERS,MOWER CONDI

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing

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RPTCL

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: AS FOLLOW UP TO PREV INITI, CONTINUE TO RESPOND TO TRADE INQ
Expected Results: ACTION 12 CANADIAN/14 LOCAL INQUIRIES.

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

Activity: WESTERN CAN FARM PROGRESS SHOW-INCOMING BUYERS MISSION PROG
Expected Results: RECRUIT 6 BUYERS, ESTABLISH 5 SELLING 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: REVISE FARM MACHINERY GUIDE OF 1985
Expected Results: PROVIDE CURRENT AND UPDATED INFORMATION RE INDUSTRY EVENTS AND OPPORTUNITIES.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	240.00 \$M	280.00 \$M	290.00 \$M	300.00 \$M
Canadian Exports	16.00 \$M	18.00 \$M	19.00 \$M	19.00 \$M
Canadian Share of Market	0.23 %	0.22 %	0.20 %	0.16 %

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 %

Products/services for which there are good market prospects:

1. HIGH TECH EQPT RELATED TO MICROWAVABLE FOODS,
2. HIGH SPEED WRAPPING & PACKAGING EQPT & PARTS
3. GLASS PACKAGING MACHINERY

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Import duties are low
- Aggressive marketing
- Fairs and Missions support
- Trade Fair activity
- Competitive pricing

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTCL

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: AS FOLLOW UP TO PREV INITI, CONTINUE TO RESPOND TO TRADE INQ
Expected Results: ACTION 30 CANADIAN/20 LOCAL INQUIRIES.

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

Activity: ASSIST W/IMPLEMENT OF NRA NAT STAND, MAY 1989, 12 COMPANIES
Expected Results: ESTABLISH 12 REPS/DISTRIBUTORS; PROJECTED SALES 2 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: SUPPORT QUE GOVT W/PROV EXHIBITS AT FOOD & DAIRY EXPO, 11/89
Expected Results: INCREASED PROFILE OF CANADIAN CAPABILITIES.

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	13000.00 \$M	13400.00 \$M	13668.00 \$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 %

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	0.00 %
JAPAN	0.00 %
IRELAND	0.00 %

Products/services for which there are good market prospects:

1. ALL SEAFOODS FRESH, FROZEN, CONVENIENCE GOURMET
2. SURIMI-BASED - INTERMEDIARY MINCED FISH

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Import duties are low
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Trade Fair activity
- 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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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: AS FOLLOW UP TO PREV INITI CONTINUE TO RESPOND TO TRADE INQ
Expected Results: ACTION 25 LOCAL/25 CANADIAN INQUIRIES.

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	5000.00 \$M	6000.00 \$M	6000.00 \$M	6000.00 \$M
Canadian Exports	31.00 \$M	39.00 \$M	45.00 \$M	50.00 \$M
Canadian Share of Market	0.62 %	0.65 %	0.75 %	0.83 %

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 %

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

Products/services for which there are good market prospects:

1. R E D
2. WEAPONS SYSTEMS
3. AMMUNITION

Factors contributing to current successful Canadian exports:

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

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RPTCL

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: PRDD MKT OVERVIEW "DEFENCE PROC UPDATE" SUMMARY OF PROJ/EQPT
Expected Results: 3 BUYING CONNECTIONS.

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

Activity: AVSCOM SPECIFIERS TO HITEC 1989
Expected Results: 3-5 BUYING CONNECTIONS.

Activity: TRUSCOM SPECIFIERS TO HITEC 1989
Expected Results: 3-5 BUYING CONNECTIONS.

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	2900.00 \$M	2700.00 \$M	3000.00 \$M	3000.00 \$M
Canadian Exports	115.00 \$M	143.00 \$M	145.00 \$M	150.00 \$M
Canadian Share of Market	4.00 %	5.30 %	4.80 %	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	0.00 %
NATO, BRUSSELS	0.00 %
JAPAN	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

Factors contributing to current successful Canadian exports:

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

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTCL

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: \$3 MILLION INCREMENTAL SALES

Activity: COMPLETE UPDATE ON "HOW TO SELL TO US MILITARY AUTH IN MIDWE
Expected Results: 10 AGENCIES/BUYING CONNECTIONS.

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

Activity: AVSCOM SPECIFIERS TO HITEC 1989
Expected Results: 3 NEW BUYING CONNECTIONS.

Activity: LHX PRIME CONTRACTORS TO HITEC 1989
Expected Results: 5 NEW BUYING CONNECTIONS.

Activity: OUGOING MISSION TO AVSCOM NOVEMBER 1989

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	3000.00 \$M	2900.00 \$M	2500.00 \$M	2500.00 \$M
Canadian Exports	1.50 \$M	1.70 \$M	2.00 \$M	2.00 \$M
Canadian Share of Market	0.05 %	0.06 %	0.08 %	0.08 %

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 %

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:

- WELL ESTABLISHED USA SUPPLY BASE

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTCL

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 WITHIN GOVT & PRIVATE SECTOR
Expected Results: \$ 500K IN INCREMENTAL SALES.

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	3200.00 \$M	3100.00 \$M	3000.00 \$M	3000.00 \$M
Canadian Exports	18.00 \$M	21.00 \$M	23.00 \$M	25.00 \$M
Canadian Share of Market	0.56 %	0.68 %	0.76 %	0.83 %

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
- OFFSET AGREEMENT, NOW
- TERMINATED NICHE
- MARKETING.

Factors for Canadian exports not reaching market potential:

- LACK OF SUSTAINED EFFORT.

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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: FOLLOW UP 1985 AIAC MISSION RESULTS
Expected Results: \$3 MILLION INCREMENTAL SALES.

Activity: FOLLOW UP 1988 NTS MISSION
Expected Results: \$2 MILLION INCREMENTAL SALES.

Activity: PARTICIPATE IN DEA/AVSCOM JOINT WORKING GROUP
Expected Results: \$10 MILLION IN DDSA OVER 5 YEARS.

Activity: UPDATE SUBCONTRACTING LIST
Expected Results: 3 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: INCOMING AVSCOM MISSION MAY 1989
Expected Results: 3 NEW BUYING CONNECTIONS.

Activity: OUTGOING MISSION TO AVSCOM NOVEMBER 1989
Expected Results: 2 NEW BUYING CONNECTIONS.

Activity: OUTGOING MISSION TO AVSCOM FEBRUARY 1990
Expected Results: 2 NEW BUYING CONNECTIONS.

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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 still in the planning stage which provide opportunities for Canadian suppliers:

JUAD "A" CONVENTION, ATLANTA

Approximate Value: 0 M\$

Financing Source :

Contact : R. CROMEN 314/862-0130

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: REMOTE SENSING

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	3500.00 \$M	3700.00 \$M	3800.00 \$M	3900.00 \$M
Canadian Exports	85.00 \$M	88.00 \$M	90.00 \$M	92.00 \$M
Canadian Share of Market	2.40 %	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	50.00 %
JAPAN	20.00 %
SINGAPORE	5.00 %
KUREA	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 SENSORS

Factors contributing to current successful Canadian exports:

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

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

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

Activity: REVIEW CANADIAN SOURCING STRENGTHS
Expected Results: UPDATED SOURCE MATERIAL.

Activity: DETERMINE TERRITORY CD REQ. IN CONJ W/LOCAL HIGH TECH/ENVIR
Expected Results: ABILITY TO MATCH LOCAL NEEDS WITH CDN SUPPLY FOR 5 CDN
COYS. NEW SALES OF \$ 1M.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: COMPUTERS, SOFTWARE & SYSTEMS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	8400.00 \$M	9000.00 \$M	9500.00 \$M	9900.00 \$M
Canadian Exports	102.00 \$M	109.00 \$M	116.00 \$M	123.00 \$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. COMPUTERS
2. PERIPHERALS
3. SOFTWARE

Factors contributing to current successful Canadian exports:

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

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

Activity: DISTRIBUTION OF NEW CDN CAPABILITY GUIDES TO US DISTRIBUTORS

Activity: FOLLOW UP ON INTEREST GENERATED FROM ABOVE GUIDES
Expected Results: OBTAIN DISTRIBUTORS FOR 10 CDN COYS WITH SALES OF \$ 1.5 MILLION.

Activity: WORK WITH CHICAGO HIGH TECH GROUP TO IDENTIFY MARKET
Expected Results: EXPORT OPPORTUNITIES FOR 6 CDN FIRMS.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: ROBOTICS & ARTIFICIAL INTELL.

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	55.00 \$M	55.00 \$M	55.00 \$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 %
OTHER 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. SOFTWARE

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMU support
- Fairs and Missions support
- Trade Fair activity
- Provincial export promotion
- Competitive pricing
- 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

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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 AT RELATED TRADE SHOWS (3)
Expected Results: 30 NEW DISTRIBUTORS APPOINTED. \$ 3,000,000 SALES OVER NEXT 3 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: PROMOTE CDN SOURCING & JOINT VENTURE OPPORTUNITIES
Expected Results: 3 NEW SOURCING CONNECTIONS 1 JOINT VENTURE.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

Sector : ADVANCED TECH. PROD. & SERV

Sub-Sector: INSTRUMENTA & PROCESS CONTROLS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	6000.00 \$M	6500.00 \$M	7000.00 \$M	7800.00 \$M
Canadian Exports	150.00 \$M	160.00 \$M	171.00 \$M	185.00 \$M
Canadian Share of Market	2.50 %	2.50 %	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 %
TAIWAN	5.00 %
SINGAPORE	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
- Competitive pricing

Factors for Canadian exports not reaching market potential:

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

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RPTCL

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: WASTE EXPO 5/89

Expected Results: 3 DISTRIBUTORS APPOINTED. SALES PROJECTED AT \$ 6,000,000.

Activity: DESIGN ENGINEERING SHOW 3/90

Expected Results: 5 DISTRIBUTORS APPOINTED. SALES PROJECTION OF \$ 5,000,000

Activity: HAZMAT CONTROL 3/90

Expected Results: 7 DISTRIBUTORS APPOINTED. SALES PROJECTIONS OF \$ 10,000,000

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	32000.00 \$M	33000.00 \$M	33000.00 \$M	33000.00 \$M
Canadian Exports	1503.00 \$M	1515.00 \$M	1527.00 \$M	1534.00 \$M
Canadian Share of Market	4.70 %	4.70 %	4.68 %	4.65 %

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	18.00 %
TAIWAN	5.00 %
KOREA	3.00 %
GERMANY WEST	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 & ACCESSORIES
2. ENGINES & PARTS
3. TRUCKS, TRACTORS & CHASSIS

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

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

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RPTCL

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: CONTINUE TO DEVELOP AGENTS, REPS & DISTRIBUTORS IN AFTERMKT
Expected Results: IDENTIFY 15 NEW POTENTIAL AGENTS, REPS AND DISTRIBUTORS FOR CDN COMPANIES.

Activity: CONTINUE TO IDENTIFY KEY BUYERS
Expected Results: IDENTIFY 12 NEW POTENTIAL BUYERS.

Activity: ONGOING DISTRIB OF POSTS "AUTO AFTERMARKET, MKTG GUIDE"

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

Activity: ASSIST IN IMPLM OF CDN NAT STAND IN APAA JULY 89
Expected Results: 4 AGENTS APPOINTED AND 4 NEW BUYER CONTACTS

Activity: COORDINATE SEMINAR FOR DISTRIBUTORS ON "DOING BUS W/CAN EFTA
Expected Results: REGISTER 10 DISTRIBUTORS INTERESTED IN HANDLING CDN PRODUCTS.

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	200.00 \$M	500.00 \$M
Canadian Exports	2.00 \$M	2.00 \$M	1.40 \$M	486.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	0.00 %

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

Major Competing Countries

Market Share

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

Products/services for which there are good market prospects:

1. SUBWAY CARS
2. LIGHT RAIL CARS
3. PASSENGER/COMMUTER RAIL
4. BUS PARTS
5. PARA TRANSIT VEHICLES
6. ACCESSORIES

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- Competitive pricing
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- Competitive Canadian financing
- willingness of exporters to invest/joint venture in territory

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Restrictive quotas
- EDC CDN CONTENT RULE CLASHES WITH
- UMTA BUY AMER RULES. WORK DONE BIDS

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RPTCL

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: ST LOUIS LIGHT RAIL PROJ WILL GO TO BID ON CARS IN JUNE 1989
Expected Results: \$ 36 M CAR ORDER.

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

Activity: FOLLOW UP TO INCOMING APTA MISSION
Expected Results: INCREASED BUYER AWARENESS OF CDN PRODUCTS.

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

Activity: CTA SUBWAY CAR PROCUREMENT
Expected Results: \$ 450 M ORDER.

Activity: CONTINUED REPORTING ON BIDDING PROCEDURES & FINANCING OF CTA

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	560.00 \$M	616.00 \$M	660.00 \$M	700.00 \$M
Canadian Exports	14.00 \$M	17.00 \$M	19.00 \$M	21.00 \$M
Canadian Share of Market	2.50 %	2.70 %	2.90 %	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 %
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. 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
- 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: BUYERS TO TORONTO BOAT SHOW
Expected Results: SALES OF OVER \$ 500,000 FOR 3 CDN CO.
EXPANDED KNOWLEDGE OF CANADIAN POTENTIAL.

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

Activity: FOLLOW UP ON LEADS GENERATED THROUGH CDN PARTI AT INTEC
Expected Results: NEW DISTRIBUTORS (3) FOR 2 CDN COMPANIES.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	2800.00 \$M	2820.00 \$M	3000.00 \$M	3000.00 \$M
Canadian Exports	924.00 \$M	850.00 \$M	960.00 \$M	960.00 \$M
Canadian Share of Market	33.00 %	30.00 %	32.00 %	32.00 %

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 %
SCANDINAVIA	3.00 %
SOUTH AMERICA	2.00 %
AUSTRALIA	1.00 %
AFRICA	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. CONSTRUCTION GRADE DIMENSION LUMBER
2. MILLWORK
3. MOULDINGS

Factors contributing to current successful Canadian exports:

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

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: 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: ONGOING WORK WITH COFI
Expected Results: MARKETING INFO FOR CDN INDUSTRY.

Activity: CONTINUED LIAISON WITH NAWLA
Expected Results: VALUED CONTACT WITH TRADE ORGANIZATION.

Activity: RESPONSIVE WORKLOAD
Expected Results: 2 COMPANIES TO APPOINT WHOLESALERS.

Activity: ACE HARDWARE LUMBER SHOW, JAN. 89
Expected Results: 3 MILLS WILL SELL ACE.

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

Activity: MARKETING SEMINAR FOR MILLS AND WHOLESALERS
Expected Results: 3 MILLS WILL FIND NEW BUYERS.

Activity: FOLLOW UP TO ACE HARDWARE SHOW CONTACTS
Expected Results: INCREASED AWARENESS OF CDN PRODUCTS.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CHICAGO

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	36000.00 \$M	36500.00 \$M	36500.00 \$M	37500.00 \$M
Canadian Exports	1144.00 \$M	1200.00 \$M	1250.00 \$M	1300.00 \$M
Canadian Share of Market	3.20 %	3.30 %	3.30 %	3.50 %

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 %
SCANDINAVIA	3.00 %
BRAZIL	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. NEWSPRINT
2. SPECIALTY PAPER
3. PRINTING PAPER

Factors contributing to current successful Canadian exports:

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

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RPTCL

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: ONGOING RESP WORKLOAD TO LOCAL ENG MIRRORS WORLD PROD & DEMAND
Expected Results: DEPENDS ON WORLD SUPPLY.

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

Activity: GRAPH EXPO '89
Expected Results: GENERATE 30 PAPER SOURCING REQUESTS, AS WELL AS 10 NEW AGENTS OR DISTRIBUTORS FOR EQUIPMENT SALES.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	3605.00 \$M
Canadian Exports	80.50 \$M	88.00 \$M	94.50 \$M	102.70 \$M
Canadian Share of Market	2.50 %	2.60 %	2.70 %	2.85 %

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 %
GERMANY WEST	0.00 %
MEXICO	0.00 %
JAPAN	0.00 %
UNITED KINGDOM	0.00 %

Products/services for which there are good market prospects:

1. METAL FABRICATIONS
2. INVESTMENT CASTINGS
3. PRECISION COMPONENTS

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- Competitive pricing
- Canada is one of few sources of supply
- bilateral economic trade agreement

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
- Unsuitable product
- VRA'S

30/05/89

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: RESPONSIVE WORKLOAD - HIGH FROM TERRITORY
Expected Results: 6 BUYING CONNECTIONS AND OVER \$ 12 MILLION.

Activity: SURVEY OF MAJOR MACHINE MANUF TO DETERMINE & PROMOTE PDT CDN

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

Activity: ASSIST IN IMPLEM OF CDN NAT STAND IN FABTECH OCT/89
Expected Results: 5 AGENT/DISTRIBUTOR ARRANGEMENTS

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 & COORDINATE SEMINAR/TABLE TOP SHOW FOR END-USERS
Expected Results: IDENTIFY 10 NEW BUYERS AND 15 NEW DISTRIBUTORS.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	3651.00 \$M
Canadian Exports	81.00 \$M	87.00 \$M	98.00 \$M	117.00 \$M
Canadian Share of Market	2.50 %	2.60 %	3.00 %	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 %
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. RESOURCE RECOVERY SYSTEMS
2. MINING MACHINERY

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

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Market prospects have not been adequately explored
- Performance of local agent or representative

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: 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
Expected Results: 3 AGENT/DISTRIBUTOR ARRANGEMENTS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

Sector : CHEM PROD & PETROCHEM,EQP,SERV

Sub-Sector: PLASTICS PRODUCTS,EQUIP,SERVIC

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	0.00 \$M
Canadian Exports	448.00 \$M	452.00 \$M	500.00 \$M	0.00 \$M
Canadian Share of Market	31.00 %	30.00 %	32.00 %	0.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	70.00 %
JAPAN	10.00 %
TAIWAN	5.00 %
KOREA	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 & RESINS
2. PLASTIC PRODUCTS

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising

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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: ASSIST IN IMPLM OF NAT STAND AT HAZMAT IN 03/90 & FOLLOW UP
Expected Results: 5 NEW AGENT/DISTRIBUTOR ARRANGEMENTS AND \$1 MILLION IN POTENTIAL SALES.

Activity: ASSIST IN IMPLM OF CDN NAT STAND AT PAINTCON IN 05/89 & FUP
Expected Results: 5 NEW AGENT DISTRIBUTOR ARRANGEMENTS AND \$ 2 MILLION IN POTENTIAL SALES.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	1.02 \$M	1.05 \$M	1.08 \$M	1.10 \$M
Canadian Exports	22.00 \$M	23.00 \$M	25.00 \$M	27.00 \$M
Canadian Share of Market	0.02 %	0.02 %	0.02 %	0.02 %

Major Competing Countries

Market Share

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

Products/services for which there are good market prospects:

1. FASHION CONSCIOUS CLOTHES APPEALING TO AGE 35-54
2. WOMEN'S CAREER CLOTHING
3. WOMEN'S & MEN'S ACTIVEWEAR
4. CHILDREN'S WEAR...ALL AGES

Factors contributing to current successful Canadian exports:

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

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 TO PREV INITI, CONTINUE TO RESPOND TO TRADE INQUIR
Expected Results: ACTION 30 CANADIAN/60 LOCAL INQUIRIES FOR MARKET ASSISTANCE.

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

Activity: SUPPORT INCOMING BUYERS MISSION TO MONTREAL PRET, OCT 1989
Expected Results: RECRUIT 12 BUYERS; ANTICIPATED SALES 1/2 MILLION.

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

Activity: ATTEND 10 APPAREL RELATED TRADE SHOWS TO ASSESS MKT TRENDS
Expected Results: DEVELOP PROFILE OF BUYERS AND AGENTS AS NEEDED TO DISTRIBUTE TO CANADIAN APPAREL MFG'S.

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	10.00 \$M	10.50 \$M
Canadian Exports	0.25 \$M	0.25 \$M	0.25 \$M	0.50 \$M
Canadian Share of Market	2.50 %	2.50 %	2.50 %	4.50 %

Products/services for which there are good market prospects:

1. PUBLICATIONS
2. VISUAL ARTS
3. PERFORMING ARTISTS HANDLED 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

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

Activity: AS FOLLOW UP TO PREV INITI, CONTINUE TO RESPOND TO TRADE INQ
 Expected Results: ACTION 30 CANADIAN/15 LOCAL TRADE INQUIRIES.

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RPTCL

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: IDENTIFY & RESEARCH ART GALLERIES LOCATED IN CHICAGO
Expected Results: MINI GUIDE PROFILING CHICAGO GALLERIES (COMPANY CONTACTS AND THEIR MERCHANDISING OPERATIONS).
- Activity: ATTEND CHICAGO INTERNATIONAL ART FAIR MAY 12-16, 1989
Expected Results: ENHANCED PROFILE OF CANADIAN CAPABILITIES.
- Activity: ATTEND NEW ART FORMS EXPO, OCTOBER 1989.
Expected Results: ENHANCED PROFILE OF CANADIAN CAPABILITIES.
- Activity: CONSIDER MAKING PIPP PROPOSAL TO MOUNT NAT STAND AT AME LIB
Expected Results: THREE DISTRIBUTORS APPOINTED.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	33100.00 \$M	34680.00 \$M	36000.00 \$M	38000.00 \$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
UNITED STATES OF AMERICA	50.00 %
TAIWAN	10.00 %
KOREA	10.00 %
JAPAN	10.00 %
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. HARDWARE
2. SPORTING GOODS
3. HOUSEWARES
4. TOYS & GAMES

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PENT support
- Fairs and Missions support
- Provincial export promotion

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- 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: HARDWARE MARKETING SEMINAR, TORONTO, FEBRUARY 1989
Expected Results: BETTER EXPORTER AWARENESS.

Activity: HOUSEWARES FREE TRADE SEMINAR FOR RETAILERS, JANUARY 1989
Expected Results: INCREASED RECEPTIVITY TO BUYING FROM CANADA.

Activity: INCOMING BUYERS TO CSGA, FEBRUARY 1989
Expected Results: INCREASED RECEPTIVITY TO BUYING FROM CANADA.

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

Activity: NATIONAL HARDWARE SHOW, AUGUST 1989
Expected Results: \$ 50,000 ON SITE SALES;
20 AGENTS APPOINTED

Activity: NATIONAL SPORTING GOODS SHOW, SEPTEMBER 1989
Expected Results: \$ 10,000 ON SITE SALES;
12 AGENTS APPOINTED.

Activity: NATIONAL HOUSEWARES SHOW, JANUARY 1990
Expected Results: \$ 10,000 ON SITE SALES
10 AGENTS APPOINTED.

Activity: NATIONAL HOME CENTER SHOW, MARCH 1990
Expected Results: \$ 30,000 ON SITE SALES;
15 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: AD CAMPAIGN PHASE II - APRIL 1989, SPORTING GOODS
Expected Results: 400 LEADS GENERATED FOR 6 COMPANIES.

Activity: MARKETING SEMINAR - SPORTING GOODS, MAY 1989
Expected Results: 6 COMPANIES WILL MEET MAJOR US RETAILERS

Activity: HARDWARE MARKETING GUIDE
Expected Results: IMPROVED EXPORTER AWARENESS.

Activity: SPORTING GOODS MARKETING GUIDE
Expected Results: IMPROVED EXPORTER AWARENESS.

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	168000.00 \$M	170000.00 \$M	180000.00 \$M	210000.00 \$M
Canadian Exports	20.00 \$M	20.00 \$M	21.00 \$M	25.00 \$M
Canadian Share of Market	11.90 %	11.70 %	11.60 %	12.20 %

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 %

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

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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: FOLLOW UP TO PREV TRADE INITI, CONTINUE RESPOND TO TRADE INQ
Expected Results: ACTION 20 CANADIAN/10 LOCAL INQUIRIES.

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

Activity: SUPPORT INCOMING BUYERS MISSION FOR MTL FURNITURE SHOW,
Expected Results: MONTREAL: IDENTIFY 20 BUYING CONNECTIONS RECRUIT 10 BUYERS
TO FAIR. IIDEX: IDENTIFY 100 BUYERS & REPS, DEALERS CONTRACT

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	600.00 \$M	700.00 \$M	750.00 \$M	880.00 \$M
Canadian Exports	999999.00 \$M	999999.00 \$M	999999.00 \$M	999999.00 \$M
Canadian Share of Market	1.50 %	1.50 %	1.60 %	1.70 %

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	3.00 %
TAIWAN	7.00 %
SINGAPORE	5.00 %

Products/services for which there are good market prospects:

1. PC 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
- Competitive pricing

Factors for Canadian exports not reaching market potential:

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

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RPTCL

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: REP. LOCATOR PROG TO MATCH CDN EXPORTERS W/AGENTS & DISTRIB.
Expected Results: 7 NEW DISTRIBUTORS APPOINTED

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	180000.00 \$M	200000.00 \$M	200000.00 \$M	210000.00 \$M
Canadian Exports	5.80 \$M	6.00 \$M	6.40 \$M	6.60 \$M
Canadian Share of Market	3.20 %	3.00 %	3.20 %	3.30 %

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	62.00 %
JAPAN	16.00 %
GERMANY WEST	9.00 %

Products/services for which there are good market prospects:

1. PLASTIC DISPOSABLE DEVICES
2. REUSABLE MEDICAL PRODUCTS
3. LOW COST IMAGING MACHINES

Factors contributing to current successful Canadian exports:

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

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RPTCL

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 TO PREV INITI, CONTINUE TO RESPOND TO TRADE INQUIR
Expected Results: ACTION 15 LOCAL/15 CANADIAN

Activity: DEVELOP & REFINE METHODS OF HOW TO SELL TO THE U.S.
Expected Results: MINI MARKET GUIDE.

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

Activity: HIDA - SEPT '89 - JOINT FEDERAL PROVINCIAL STAND
Expected Results: ESTABLISH 12 REP/DISTRIBUTOR AGREEMENTS.

Activity: AMERICAN HOSP ASSOC - MOUNT CANADIAN STAND; JULY '89
Expected Results: ESTABLISH 12 REP/DISTRIBUTOR AGREEMENTS.

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	0.10 \$M	0.10 \$M	0.10 \$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: 5-15 \$M

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	95.00 %
KUREA	3.00 %

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. POWER TOOLS

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

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

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RPTCL

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: AIA SHOW, ST. LOUIS, MO, MAY 89
Expected Results: \$ 20,000 ON SITE SALES;
6 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: POSSIBLE CHICAGO BLDG PROD TABLE TOP SHOW (DEPENDS ON RESULT

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	3770.00 \$M
Canadian Exports	220.00 \$M	228.00 \$M	235.00 \$M	256.00 \$M
Canadian Share of Market	6.50 %	6.50 %	6.50 %	6.80 %

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 %
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. INDUSTRIAL MACHINERY
2. METALWORKING
3. MINING-RELATED EQUIPMENT
4. MATERIAL HANDLING

Factors contributing to current successful Canadian exports:

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

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: DETERMINE POTENTIAL FOR EQUIP & MACH & UNDERTAKE POST PRODUC
Expected Results: IDENTIFICATION OF NEW MARKET OPPORTUNITIES AND 5 NEW BUYER CONNECTIONS.

Activity: MAKE 12 OUTCALLS ON PUBLIC/PRIVATE SECTOR FIRMS—PROMOTE CDN
Expected Results: 5 NEW BUYER CONNECTIONS

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

Activity: ASSIST IN IMPLEMENTATION OF NAT STAND IN DESIGN ENGINEERING
Expected Results: 10 COMPANIES, TO MAKE INITIAL SALES ARRANGEMENTS WITH BUYERS & 20 TO APPOINT AGENTS.

Activity: ASSIST IN IMPLEMENTATION OF CDN NAT STAND IN ASSEMBLY TECH
Expected Results: 10 COMPANIES TO MAKE INITIAL SALES ARRANGEMENTS WITH BUYERS AND 20 TO APPOINT 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: DEVELOP LIST OF INTERESTED SALES AGENTS/DISTR FOR USE BY CDN
Expected Results: INFORMATION FOR CDN EXPORTERS TO LEAD TO 6 NEW REPRESENTATION APPOINTMENTS.

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	7263.00 \$M	7611.00 \$M	7234.00 \$M	7300.00 \$M
Canadian Exports	109.00 \$M	114.00 \$M	116.00 \$M	117.00 \$M
Canadian Share of Market	1.50 %	1.50 %	1.60 %	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	97.00 %
PORTUGAL	0.39 %
JAPAN	0.33 %
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. SPECIALIZED TOOLS
2. TOOLS, DIES & MOLDS

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- TECHNICAL SUPERIORITY AND
- A LEADER IN QUALITY
- ASSURANCE

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Unsuitable product
- 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: MODERATE RESPONSIVE WORKLOAD FROM TERRITORY
Expected Results: FOUR BUYING CONNECTIONS.

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

Activity: ASSIST IN IMPLEMENT. OF NAT'L STAND AT ADV MFG SYST IN APR.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CHICAGO

Market: UNITED STATES OF AMERICA

Sector : INDUSTRIAL MACHIN, PLANTS, SERV.

Sub-Sector: OTHER EQUIP, MACH NOT ELS SPE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	4980.00 \$M	5082.00 \$M	4934.00 \$M	0.00 \$M
Canadian Exports	94.60 \$M	91.30 \$M	98.70 \$M	0.00 \$M
Canadian Share of Market	1.90 %	1.80 %	2.00 %	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	89.00 %
JAPAN	3.00 %
GERMANY WEST	2.00 %
UNITED KINGDOM	1.00 %
MEXICO	1.00 %

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

Activity: DEVELOP GUIDE TO MKT ENVIRON EQPT IN WI, ILLINOIS & MIS TERR
 Expected Results: INFORMATION FOR EXPORTERS TO USE FOR PLANNING & APPOINTING
 REPRESENTATION.

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

Activity: ASSIST IN IMPLEM OF NAT STAND IN WASTE EXPO IN MAY 89
 Expected Results: 5 AGENT APPOINTMENTS AND \$ 1 MILLION IN SALES

Activity: ASSIST IN IMPLEM OF NAT STAND AT GRAPH EXPO (RESP FOREST OFF
 Expected Results: 10 AGENTS/DISTRIBUTORS TO BE APPOINTED.

RPTDL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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
Current year	17400.00	50.00	50.00
One year ago	18100.00	50.00	50.00
Two years ago	19000.00	50.00	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:

\$2620 BILLION ONE MAJOR CORPORATE ACQUISITION \$1B. NET NEW PORTFOLIO INVESTMENT/SHORT TERM PAPER \$1B. MED. TO LONG TERM PAPER \$100M. PORTFOLIO EQUITIES \$50M. ONE MED. CORPORATE ACQUISITION \$100M. TEN SMALL GREENFIELD INVESTMENTS @ \$200K TOTAL \$2M.

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

- EEC
- JAPAN
- SOUTHEAST ASIA
- LATIN AMERICA

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 INVESTORS
- MAILINGS OF POTENTIAL MATERIALS
- TRADE SHOW PARTICIPATION

RPTDL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: CHICAGO

Country: UNITED STATES OF AMERICA

Compared to major competitive destinations, Canada is perceived to have

the following advantages:

- MARKET OPPORTUNITIES
- SIMILARITY OF BUSINESS PRACTICES
- PROXIMITY/GOOD COMMUNICATIONS

the following constraints:

- LABOUR/PRODUCTIVITY LABOUR/RELATIONS
- FIRA MEMORIES
- VIEW OF CANADA AS SMALL 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	MEDIUM
Strategic Partnering	LOW
Technology Licensing	MEDIUM

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

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

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: CHICAGO

Country: UNITED STATES OF AMERICA

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

	Date
Type: MISSION OUT, MINISTERIAL	
SPEAKING ENGAGEMENTS	0/00
Location: CHI;ST LOUIS,MILWAUK	
Invest Nature:	
Sector: MULTIPLE SECTORS	
Cooperants: DEA/MINT IC, C OF C IN TERRITORY	
Estimated Budget: \$0.00	
Type: SEMINAR, ABROAD	
3HR MAX SEMINAR	10/89
Location: CHICAGO	
Invest Nature: ACQUISITION/ JT VENTURE	
Sector: INDUSTRIAL MACHIN,PLANTS,SERV.	
Cooperants: PROV. REG. IND. DEV. IC, BANKS, ISTC	
Estimated Budget: \$10,500.00	
SEMINARS	10/89
Location: CHICAGO	
Invest Nature: ACQUISITION JT VENTURE	
Sector: INDUSTRIAL MACHIN,PLANTS,SERV.	
Cooperants: PROV. REG. IND. DEV. IC, BANKS. ISTC	
Estimated Budget: \$10,500.00	
SEMINAR WITH LOCAL BANKS, LAW, ACCOUNTING, MANAGEMENT, CONSOLING FIRMS	0/00
Location: ALL CENTRES	
Invest Nature: ACQUISITION	
Sector: MULTIPLE SECTORS	
Cooperants: CDN BANKS ACCOUNTING/LEGAL FIRMS	
Estimated Budget: \$5,000.00	
SEMINAR	5/89
Location: KANSAS CITY	
Invest Nature: ACQUISITION PORTFOLIO	
Sector: MULTIPLE SECTORS	
Cooperants: IC, PRO, REG, IND, DEV, ACCTNG/LEGAL	
Estimated Budget: \$9,000.00	

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RPT02

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: CHICAGO

Country: UNITED STATES OF AMERICA
Date

Type: SEMINAR, ABROAD

MINI-SEMINARS WITH LOCAL BANKS, LAW, ACCT, MANAGEMENT CONSULTING FIRMS 0/00

Location: ALL CENTRES
Invest Nature: ACQUISITION
Sector: MULTIPLE SECTORS
Cooperants: CDN BANKS ACCT/LEGAL FIRMS
Estimated Budget: \$5,000.00

3HR MAX SEMINAR 5/89

Location: KANSAS CITY
Invest Nature: ACQUISITION/
PORTFOLIO
Sector: MULTIPLE SECTORS
Cooperants: IC, PROV. REG. DND. DEV. ACCTING/LEGAL FIRMS
Estimated Budget: \$9,000.00

3HR. MAX SEMINAR 7/89

Location: QUAD CITIES
Invest Nature: ACQUISITION/
PORTFOLIO
Sector: MULTIPLE SECTORS
Cooperants: IC, PROV. REG.. DEV. ACCOUTING/LEGAL FIRMS
Estimated Budget: \$7,000.00

SEMINAR 7/89

Location: QUAD CITIES
Invest Nature: ACQUISITION
PORTFOLIO
Sector: MULTIPLE SECTORS
Cooperants: IC, PROVINCES, REG. INV. DEV ACCTNG/LEGAL
Estimated Budget: \$7,000.00

Type: DIRECT MAIL CAMPAIGN

DIRECT OF MAILING OF LITERATURE 9/89

Location: ILL. MISSOURI, WISCON
Invest Nature: ACQUISITION/
JT VENTURE
Sector: INDUSTRIAL MACHIN, PLANTS, SERV.
Cooperants: I.C. I.S.T.C.
Estimated Budget: \$5,000.00

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RPTDZ

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: CHICAGO

Country: UNITED STATES OF AMERICA
Date

Type: OTHER PROMOTION

TO ATTRACT ENTREPRENEURIAL IMMIGRANTS	1/90
Location: MID-WEST	
Invest Nature: ACQUISITION	
Sector: OTHER SERVICES	
Cooperants: IMMIGRATION DEA/UTW	
Estimated Budget: \$12,500.00	
UPDATE TO DATABASE ON ILLINOIS, WISCONSIN, & MISSOURI COMP.	0/00
Location:	
Invest Nature: DATA UPDATE	
Sector: MULTIPLE SECTORS	
Cooperants: CONSULTING FIRMS	
Estimated Budget: \$5,000.00	
DESIGN ENGINEERING SHOW	3/90
Location: CHICAGO	
Invest Nature: ACQUISITION/ JT VENTURE	
Sector: INDUSTRIAL MACHIN, PLANTS, SERV.	
Cooperants: PROV. REG. IND. DEV. IC, BANKS, ISTC	
Estimated Budget: \$15,000.00	
ASSEMBLY TECH EXPO	9/89
Location: CHICAGO	
Invest Nature: ACQUISITION/ JT VENTURE	
Sector: INDUSTRIAL MACHIN, PLANTS, SERV.	
Cooperants: PROV. REG. IND. DEV. IC, BANKS, ISTC	
Estimated Budget: \$15,000.00	
APAA SHOW	8/89
Location: CHICAGO	
Invest Nature: ACQUISITION/ JT VENTURE	
Sector: TRANSPORT SYS, EQUIP, COMP, SERV.	
Cooperants: PROV. REG. IND. DEV. IC, BANKS, ISTC	
Estimated Budget: \$15,000.00	
NRA SHOW	5/89
Location: CHICAGO	
Invest Nature: ACQUISITION JT VENTURE	
Sector: INDUSTRIAL MACHIN, PLANTS, SERV.	
Cooperants: PROV. REG. IND. DEV. IC, BANKS, ISTC	
Estimated Budget: \$15,000.00	

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RPT02

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABOARD

Mission: CHICAGO

Country: UNITED STATES OF AMERICA
Date

Type: OTHER PROMOTION

ADVANCED MFG SYSTEMS SHOWS

4/89

Location: CHICAGO

Invest Nature: ACQUISITION/
JT VENTURE

Sector: INDUSTRIAL MACHIN, PLANTS, SERV.

Cooperants: PROV. REG. IND. DEV. IC, BANKS, ISTC

Estimated Budget: \$15,000.00

Total estimated budget for all proposals: \$160,500.00

Post : CHICAGO

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Post/Contact</u>
89/04/10	COMDEX SPRING'89, CHICAGO, ILL. U.S.A. FAIR, NATIONAL STAND	ADVANCED TECH. PROD. & SERV K.MUNRO
89/05/04	WASTE EXPO'89, CHICAGO, ILL., U.S.A. FAIR, NATIONAL STAND	INDUSTRIAL MACHIN, PLANTS, SERV
89/05/20	NATIONAL RESTAURANT ASSOC. HOTEL-MOTEL SHOW, CHICAGO, ILL. FAIR, NATIONAL STAND	AGRI & FOOD PRODUCTS & SERVICE G.WILLOWS
89/07/00	AUTOMOTIVE PARTS & ACCESSORIES ASSOC. (CHICAGO) FAIR, NATIONAL STAND	TRANSPORT SYS, EQUIP, COMP, SERV. K.J. TYRRELL
89/08/13	NATIONAL HARDWARE SHOW CHICAGO FAIR, NATIONAL STAND	CONSUMER PRODUCTS E.WANG
89/09/15	NAT'L SPORTING GOODS ASSOC. SHOW-NSGA-CHICAGO FAIR, NATIONAL STAND	CONSUMER PRODUCTS J.COONE
89/10/00	IMTEC BOAT SHOW-INTL MARINE TRADE EXHIBIT & CONF. FAIR, NATIONAL STAND	CONSUMER PRODUCTS
89/10/15	GRAPH EXPO, CHICAGO FAIR, NATIONAL STAND	CONSTRUCTION INDUSTRY J.LEGAULT
89/10/17	FINISHING '89 FAIR, NATIONAL STAND	CONSTRUCTION INDUSTRY
90/03/11	NATIONAL HOME CENTER SHOW, CHICAGO FAIR, NATIONAL STAND	CONSUMER PRODUCTS E. WANG

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: CLEVELAND

Country: UNITED STATES OF AMERICA

IN 1987 BILATERAL TRADE BETWEEN CANADA AND THE CONSULATE'S TERRITORY, THE STATES OF OHIO, KENTUCKY, WEST VIRGINIA AND WESTERN PENNSYLVANIA, AMOUNTED TO \$15.8 BILLION WITH EXPORTS TO THE TERRITORY TOTALLING \$7.3 BILLION AND IMPORTS, \$8.5 BILLION. EXPORTS WERE UP 4.6% OVER 1986 WHILE IMPORTS ROSE BY ONLY 0.2%. THIS RESULTED IN A 19% REDUCTION IN THE DEFICIT AS EXPORTS CONTINUED TO RISE FASTER THAN IMPORTS. THE BULK OF EXPORTS, 78%, FELL INTO FOUR CATEGORIES; TRANSPORTATION EQUIPMENT 28%, METALS AND MINERALS 22%, FOREST PRODUCTS 18%, AND CHEMICALS AND PLASTICS 10%. THE LEADING SINGLE EXPORT WAS MOTOR VEHICLE PARTS WHICH REPRESENTED 23% OF THE TOTAL, NEWS-PRINT WHICH REPRESENTED 8%, ALUMINUM 6%, INORGANIC CHEMICALS 5%, AND SOFTWOOD LUMBER 5%.

OHIO CONTINUED TO BE THE LARGEST MARKET IN THE TERRITORY ABSORBING APPROXIMATELY 60% OF TOTAL EXPORTS. THE FOUR PRODUCT CATEGORIES NOTED ABOVE ACCOUNTED FOR 80% OF THE EXPORTS TO THE STATE; TRANSPORTATION EQUIPMENT 36%, METALS AND MINERALS 19%, FOREST PRODUCTS 16%, AND CHEMICALS AND PLASTICS 9%. THE LARGEST SINGLE EXPORT, MOTOR VEHICLE PARTS, ACCOUNTED FOR 32% OF TOTAL EXPORTS TO OHIO, (AND 18% OF TOTAL EXPORTS TO THE TERRITORY). NEWS-PRINT WAS IN SECOND PLACE FOLLOWED BY PETROLEUM AND COAL PRODUCTS, AND INORGANIC CHEMICALS.

EXPORTS TO WESTERN PENNSYLVANIA FOR 1987 WERE ESTIMATED AT \$1.57 BILLION WHICH REPRESENTED 22% OF THE TOTAL FOR THE TERRITORY. AGAIN, THE BULK OF THE EXPORTS TO THIS PART OF THE STATE, 78%, WERE FROM FOUR PRODUCT CATEGORIES; METALS AND MINERALS 31%, FOREST PRODUCTS 30%, TRANSPORTATION EQUIPMENT 10% AND FOOD PRODUCTS 7%. THE LARGEST SINGLE EXPORT WAS NEWS-PRINT FOLLOWED BY ALUMINUM, SOFTWOOD LUMBER, AND WOOD PULP.

KENTUCKY ACCOUNTED FOR 14% OF TOTAL EXPORTS TO THE TERRITORY DURING 1987. 73% OF THE TOTAL OF \$1.03 BILLION EXPORTED TO THE STATE CAME FROM THE SAME FOUR PRODUCT CATEGORIES AS FOR THE TERRITORY AS A WHOLE; TRANSPORTATION EQUIPMENT 25%, CHEMICALS AND PLASTICS 18%, METALS AND MINERALS 17%, AND FOREST PRODUCTS 13%. THE LARGEST SINGLE EXPORT WAS MOTOR VEHICLE PARTS, FOLLOWED BY INORGANIC CHEMICALS, ALUMINUM, AND OFFICE MACHINES.

WEST VIRGINIA REPRESENTED THE SMALLEST MARKET IN THE TERRITORY IN 1987 PURCHASING ONLY 4% OF THE TOTAL EXPORTED. OF THE \$262 MILLION SOLD TO THE STATE, 91% CAME FROM THE SAME FOUR CATEGORIES AS NOTED ABOVE; METALS AND MINERALS 41%, TRANSPORTATION EQUIPMENT 22%, FOREST PRODUCTS 14%, AND CHEMICALS AND PLASTICS 14%. THE LARGEST SINGLE ITEM EXPORTED WAS ALUMINUM FOLLOWED BY AIRCRAFT ENGINES AND PARTS, SOFTWOOD LUMBER AND NICKEL.

A WELCOME TREND IS THE STEADY GROWTH OF HIGHER VALUE ADDED EXPORTS WHICH IN SOME CASES SUPPLANTED THE TRADITIONAL SEMI PROCESSED RAW MATERIALS AS THE DOMINANT EXPORT ITEMS. EXPORTS OF MOTOR VEHICLE AND AIRCRAFT PARTS, FOOD PRODUCTS, OFFICE MACHINES, AND CHEMICALS AS WELL AS OTHER MANUFACTURED PRODUCTS ROSE. THE GROWTH WHICH IS EXPECTED TO CONTINUE IN THE FUTURE, WAS DUE PRIMARILY TO THE ECONOMIC TURN AROUND EXPERIENCED BY THIS AREA AND THE DIVERSIFICATION OF THE TERRITORY'S INDUSTRIAL BASE. THE AREA CONTINUES TO ENJOY A RELATIVELY STRONG ECONOMY, WITH EMPLOYMENT AND MEDIAN

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: CLEVELAND

Country: UNITED STATES OF AMERICA

INCOME RATES ABOVE THE NATIONAL AVERAGE. A RESURGENCE OF THE TRADITIONAL INDUSTRIES, STEEL PRODUCTION AND METAL FABRICATION, HAS ALSO CONTRIBUTED TO THE TURN AROUND. CONTINUED DEVERSIFICATION, INCLUDING EXPANSION OF THE HIGH TECHNOLOGY AND SERVICE SECTORS WILL PROVIDE ADDITIONAL OPPORTUNITIES

RPT82

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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. INDUSTRIAL MACHIN, PLANTS, SERV.
RESTRUCTURING AND MODERNIZATION OF THE MFG BASE OF THE TERRITORY OFFERS IND'L MACHINERY AND EQPT SUPPLIERS SPECIALIZING IN METAL WORKING MACHINERY SOLID SALES OPPORTUNITIES AS THE AREA AS WELL AS BEING THE CENTRE OF THE STEEL INDUSTRY ACCOUNTS FOR 45% OF THE METAL WORKING INDUSTRY.
2. DEFENCE PROGRAMS, PRODUCTS, SERV
THE TERRITORY IS A MAJOR DEFENCE MARKET AREA IN THE USA. WITH OVER 200 U.S. DEFENCE CONTRACTORS, AND TWO DEFENCE LOGISTIC AGENCY SUPPLY CENTRES, NASA/LEWIS, AIR FORCE WRIGHT AERONAUTICAL LABS AND THE AERONAUTICAL SYSTEMS DIVISION, OPPORTUNITIES ABOUND FOR SMALL, MEDIUM AND LARGE CANADIAN HI-TECH MANUFACTURERS.
3. AGRI & FOOD PRODUCTS & SERVICE
THE POPULATION OF THE TERRITORY IS APPROACHING 20 MILLION. TWO OF THE LARGEST FOOD COMPANIES - HJ HEINZ AND KROGER AS WELL AS PROCTOR AND GAMBLE, ARE HEADQUARTERED IN THE TERRITORY. THERE IS AN ESTABLISHED FOOD DISTRIBUTION INFRASTRUCTURE WHICH CANADIAN PRODUCERS CAN TAKE ADVANTAGE OF.
4. ADVANCED TECH. PROD. & SERV
OF THE 52 FORTUNE 500 COMPANIES LOCATED IN THE TERRITORY, HALF ARE INVOLVED IN ADVANCED TECHNOLOGY PRODUCT DEVELOPMENT. PITTSBURGH IS THE THIRD LARGEST HI-TECH CENTRE IN THE U.S. THE OLDER RESOURCE PROCESSING AND MANUFACTURING INDUSTRIES ARE BEING REPLACED BY AUTOMATED MANUFACTURING PLANTS. THE SERVICE SECTOR IS BECOMING MORE IMPORTANT.
5. CONSUMER PRODUCTS & SERVICES
TWO OF THE TERRITORY'S EIGHT MAJOR METROPOLITAN AREAS ARE RANKED IN THE TOP 20 MARKETS IN THE UNITED STATES, WITH A COMBINED RETAIL SALES TOTAL OF \$38 BILLION, AND A MEDIAN INCOME OF \$31,000. DUE TO THE PROXIMITY OF THE TERRITORY STYLES IN CLOTHING AND TASTE IN FURNITURE AND FURNISHINGS ARE SIMILAR.
6. EDUCATION, MEDICAL, HEALTH PROD
THE TERRITORY IS A CENTRE FOR HEALTH RESEARCH AND ADVANCED MEDICAL TREATMENT AS WELL AS FOR MEDICAL CARE. THE MARKET APPEARS TO BE LARGELY UNTAPPED AS ALTHOUGH HUGE BY OUR STANDARDS, CANADIAN EXPORTS TO DATE HAVE BEEN MINIMAL. AN ESTABLISHED NETWORK OF DISTRIBUTORS IS AVAILABLE TO PROMOTE CANADIAN PRODUCTS.

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

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CLEVELAND

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	12500.00 \$M	12500.00 \$M	12500.00 \$M	12750.00 \$M
Canadian Exports	250.00 \$M	250.00 \$M	250.00 \$M	255.00 \$M
Canadian Share of Market	2.00 %	2.00 %	2.00 %	2.00 %

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	85.00 %
MEXICO	5.00 %
BRAZIL	5.00 %
FRANCE	1.00 %
ITALY	1.00 %

Products/services for which there are good market prospects:

1. BEVERAGE (WINE)
2. CHEESE
3. SNACK FOOD
4. PRE-PACKAGED FOOD
5. SEAFOOD PRODUCT
6. SPECIALTY ITEMS
7. GOURMET FOOD

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
- Strong sectoral capability in Canada

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Unsuitable product
- Limited appreciation/understanding of distribution system

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: CLEVELAND

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: SOLD FOOD SHOW - PITTSBURGH (1990)
Expected Results: \$3 MILLION (12 MONTHS).

Activity: BRITISH COLUMBIA INCOMING WINE TOUR
Expected Results: \$150,000 (12 MONTHS).

Activity: OHIO GROCER'S ASSOCIATION 10/89

Activity: FARM MACHINERY SHOW 2/90

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	0.00 \$M	390.00 \$M	400.00 \$M	450.00 \$M
Canadian Exports	0.00 \$M	35.00 \$M	40.00 \$M	45.00 \$M
Canadian Share of Market	0.00 %	9.00 %	10.00 %	10.00 %

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	0.00 %
UNITED KINGDOM	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. AEROSPACE R & D
2. AEROSPACE PRODUCTS
3. AVIONICS PRODUCTS
4. ELECTRONIC PRODUCTS
5. MACHINING SERVICES
6. VEHICLE PARTS
7. MARINE PARTS

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

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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" PROCURE

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

- Activity: ABBOTSFORD AIRSHOW
- Activity: USAF INDEPENDENT CONTRACTOR R & D REV. TEAMS VISIT TO CDN CO
- Activity: DEFENCE MANUFACTURERS BUYERS MISSION
- Activity: "HI-TECH 90" DEFENCE EXPORT CONFERENCE

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: CLEVELAND

Market: UNITED STATES OF AMERICA

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

USAF R&D & ACQUISITION RELATED Approximate Value: 100 M\$
TO US LONG TERM GOALS SET FORT Financing Source : OTHER
Contact : A.F.CAMPBELL TEL:(513)255-4382
FAX: (513) 255-1821

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	3600.00 \$M	3750.00 \$M	3830.00 \$M	3900.00 \$M
Canadian Exports	180.00 \$M	225.00 \$M	230.00 \$M	235.00 \$M
Canadian Share of Market	5.00 %	6.00 %	6.00 %	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	60.00 %
JAPAN	35.00 %
TAIWAN	10.00 %
ITALY	10.00 %
GERMANY WEST	10.00 %
SWEDEN	2.00 %

Products/services for which there are good market prospects:

1. SOFTWARE/COMPONENTS
2. INSTRUMENTATION/PROCESS CONTROLS
3. HI TECHNOLOGY CONSULTING
4. TELECOMMUNICATIONS
5. DATA COMMUNICATIONS

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: CLEVELAND

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: COLUMBUS COMPUTER SHOW 11/89

Activity: HI TECHNOLOGY MATCHING SEMINAR
Expected Results: \$5MM (12 MONTH).

Activity: SOLO SOFTWARE FAIR
Expected Results: \$6MM (12 MONTH).

Activity: INSTRUMENT SOCIETY REGIONAL SHOW
Expected Results: \$2MM (12 MONTH).

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CLEVELAND

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	11000.00 \$M	11250.00 \$M	11500.00 \$M	11500.00 \$M
Canadian Exports	1775.00 \$M	1800.00 \$M	1850.00 \$M	1850.00 \$M
Canadian Share of Market	16.00 %	16.00 %	16.00 %	16.00 %

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	70.00 %
JAPAN	10.00 %
GERMANY WEST	1.00 %

Products/services for which there are good market prospects:

1. OEM COMPONENTS & PARTS
2. AFTER MARKET 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

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

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: CLEVELAND

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: MID AMERICA TRUCK SHOW 09/89
Expected Results: PROMOTION & DIRECT SALES.

Activity: OHIO AUTO WHOLESALERS SHOW

Activity: NORTH AMERICAN SAIL & POWER BOAT SHOW 09/89
Expected Results: 4 CANADIAN EXHIBITORS.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	45000.00 \$M	45000.00 \$M	46000.00 \$M	48000.00 \$M
Canadian Exports	225.00 \$M	175.00 \$M	200.00 \$M	210.00 \$M
Canadian Share of Market	0.50 %	0.40 %	0.40 %	0.40 %

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	0.00 %
HONG KONG	0.00 %
JAPAN	0.00 %
PEOPLE'S REP OF CHINA	0.00 %
PHILIPPINES	0.00 %
KOREA	0.00 %

Products/services for which there are good market prospects:

1. CONTRACT/RESIDENTIAL FURNITURE
2. APPAREL
3. GIFTWARE
4. CRAFT PRODUCTS

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
- 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: CLEVELAND

Market: UNITED STATES OF AMERICA

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

Activity: LEATHER FASHION MISSION 02/89
Expected Results: 10MM (12 MONTHS).

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

Activity: MONTREAL FURNITURE SHOW 6/89
Expected Results: 10 GUESTS

Activity: TORONTO FURNITURE SHOW 1/90
Expected Results: 10 GUESTS

Activity: SPORTSMAN SHOW 3/90
Expected Results: 25 EXHIBITORS

Activity: IIDEX 11/89

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: CLEVELAND

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	11000.00 \$M	10000.00 \$M	10000.00 \$M	11000.00 \$M
Canadian Exports	11.00 \$M	10.00 \$M	10.00 \$M	11.00 \$M
Canadian Share of Market	1.00 %	1.00 %	1.00 %	1.00 %

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	80.00 %
EUROPEAN COMMON MARKET C	10.00 %
JAPAN	5.00 %

Products/services for which there are good market prospects:

1. SURGICAL INSTRUMENTS
2. HOSPITAL SUPPLIES
3. LABORATORY EQUIPMENT
4. DIAGNOSTIC EQUIPMENT

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

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Unsuitable product

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: CLEVELAND

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: OHIO HOSPITAL ASSOCIATION SHOW

Expected Results: 4 CANADIAN EXHIBITORS

Activity: SAFETY EQUIPMENT EXHIBIT

Activity: SOLD MEDICAL SHOW 04/89

Expected Results: 15 EXHIBITORS. 12 MONTH SALES PROJECT \$1 MILLION

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	1530.00 \$M	1750.00 \$M	2000.00 \$M	2000.00 \$M
Canadian Exports	230.00 \$M	265.00 \$M	300.00 \$M	300.00 \$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	20.00 %
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. GENERAL INDUSTRIAL MACHINERY
2. MATERIALS HANDLING EQUIPMENT
3. POLLUTION CONTROL MACHINERY/EQUIPMENT
4. METAL PROCESSING EQUIPMENT AND MACHINERY
5. METALWORKING MACHINERY
6. MACHINE PARTS
7. FABRICATING/MOLDING EQUIPMENT

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Provincial export promotion
- Competitive pricing

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: CLEVELAND

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

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

Activity: AISE SHOW 09/89
Expected Results: \$15 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: GREAT LAKES INDUSTRIAL SHOW 11/89
Expected Results: THREE CANADIAN EXHIBITORS SALES \$50,000 ON SITE \$2MILLION (12 MONTHS).

Activity: PRECISION CASTING AND MACHINERY 11/89

Activity: POLLUTION CONTROL EQUIPMENT
Expected Results: \$15 M (12 MONTHS)

Activity: SME FINISHING SHOW
Expected Results: 12 MONTHS PROJECTED SALES \$3 MILLION

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RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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
Current year	10000.00	25.00	35.00
One year ago	10000.00	25.00	35.00
Two years ago	10000.00	25.00	35.00

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

\$ 200 MILLION

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

- EEC - UK, FRG, NETHERLANDS
- JAPAN

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

- SEMINARS AND PRESENTATIONS.
- ADVERTISEMENTS IN BUSINESS PRESS.

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: CLEVELAND

Country: UNITED STATES OF AMERICA

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

- PROXIMITY
- SECTORAL COMPATIBILITY

the following constraints:

- RESIDUAL AVERSION TO FIRA
- PAROCHIALISM

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

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

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

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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: CLEVELAND

Country: UNITED STATES OF AMERICA

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

	Date
Type: MISSION OUT, INDUSTRY	
MATCHMAKER	2/90
Location: COLUMBUS	
Invest Nature: JOINT VENTURE	
Sector: MULTIPLE SECTORS	
Cooperants:	
Estimated Budget: \$10,000.00	
MATCHMAKER MISSION FROM ONTARIO	11/89
Location: PITTSBURGH	
Invest Nature: JOINT VENTURE	
STRATEGIC PARTN	
TECHN LICENSING	
Sector: ADVANCED TECH. PROD. & SERV	
Cooperants: PROV. OF ONT. & LOCAL ORG.	
Estimated Budget: \$5,000.00	
Type: SEMINAR, ABROAD	
HIGH LEVEL PRESENTATION OF CANADIAN ECONOMY & INVESTMENT CLIMATE FOR PN CLIENTS.	4/89
Location: PITTSBURGH	
Invest Nature: PORTFOLIO	
ACQ.GREENFIELD	
JOINT VENTURE	
Sector: MULTIPLE SECTORS	
Cooperants: PROV. OF ONT. PGH NAT. BANK	
Estimated Budget: \$4,000.00	
PRESENTATION ON STATE OF DEVELOPMENT IN CANADA.	5/89
Location: AKRON	
Invest Nature: GREENFIELD	
JOINT VENTURE	
TECHN LICENSING	
Sector: CHEM PROD & PETROCHEM,EQP,SERV	
Cooperants: SOCIETY OF PLASTICS INDUSTRIES	
Estimated Budget: \$2,000.00	

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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: CLEVELAND

Country: UNITED STATES OF AMERICA
Date

Type: OUTCALL PROGRAM

CORPORATE LIAISON WITH FORTUNE 500 COS IN PGH.

0/89

Location: PITTSBURGH

Invest Nature: PORTFOLIO

ACQ. GREENFIELD

JOINT VENTURE

Sector: MULTIPLE SECTORS

Cooperants:

Estimated Budget: \$0.00

Type: OTHER PROMOTION

SPEECH TO SENIOR BUSINESSMEN.

3/90

Location: FRANKFURT KY

Invest Nature: ACQUISITION

JOINT VENTURE

Sector: MULTIPLE SECTORS

Cooperants:

Estimated Budget: \$2,000.00

Total estimated budget for all proposals:

\$23,000.00

Post : CLEVELAND

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Post/Contact</u>
89/05/05	AIA-AMERICAN INSTITUTE OF ARCHITECTS SHOW, ST. LOUIS, MO. FAIR, NATIONAL STAND	CONSTRUCTION INDUSTRY M.SAMSON
89/10/17	FINISHING '89 CINCINNATI FAIR, NATIONAL STAND	CONSTRUCTION INDUSTRY M.J.BIEMAN
89/11/02	SOLO FOOD SHOW-CLEVELAND FAIR, SOLO	AGRI & FOOD PRODUCTS & SERVICE

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: DALLAS

Country: UNITED STATES OF AMERICA

TWO WAY TRADE BETWEEN CANADA AND THE POST TERRITORY TOTALLED C\$7.0 BILLION IN 1987 UP FROM C\$6.5B IN 1986. CANADIAN EXPORTS, THOUGH, WERE VIRTUALLY UNCHANGED AT \$2.9B. MAJOR EXPORTS WERE: MOTOR VEHICLE PARTS, AIRCRAFT ENGINES AND PARTS, ALUMINUM INCLUDING ALLOYS, NEWSPRINT PAPER, SOFTWOOD LUMBER AND ORGANIC CHEMICALS. WITHIN THE REGION, TEXAS IS BY FAR THE DOMINANT STATE IN BOTH SIZE AND POPULATION AS WELL AS INDUSTRIAL PRODUCTION AND, MOST IMPORTANTLY, MARKET POTENTIAL.

THE ECONOMIC PERFORMANCE OF THE SIX SOUTHWESTERN STATES DURING THE MID 1980'S HAS SUFFERED DECLINE AND RESTRUCTURING IN CONTRAST WITH GROWTH AND PROSPERITY FOR THE COUNTRY AS A WHOLE. THE BELLWEATHER OF THIS HAS BEEN THE OIL AND GAS INDUSTRY WHICH HAS BOTH REFLECTED AND DRIVEN THE DECLINE THROUGH PLUMMETTING OIL PRICES. IN CONSEQUENCE, MORE THAN 300,000 "DIL-PATCH" JOBS HAVE DISAPPEARED SINCE 1983, EVEN MORE ILLUSTRATIVE IS THE DECLINE IN TEXAS OIL INDUSTRY TAX RECEIPTS FROM 26% OF THE TOTAL IN 1983 TO JUST 8% IN 1988. WITH THE PRESENT OIL PRICE BELOW US \$14 PER BARREL AND WITH MOST EXPERTS PREDICTING IT WILL REMAIN UNDER \$18, PRODUCTION VOLUME AND EMPLOYMENT LEVELS ARE LIKELY TO REMAIN STATIC AT LEAST IN THE MEDIUM TERM ON THE UPSIDE, OIL COMPANY PROFITS ARE UP 30% THIS YEAR, AND OIL/GAS INDUSTRY DIVERSIFICATION HAS TURNED FROM NEGATIVE TO POSITIVE WITH SIGNIFICANT NEW INVESTMENT (US \$2.5B SO FAR) DIRECTED PRINCIPALLY TOWARD ON-SITE REFINING AND PROCESSING. REGIONAL ECONOMIC GROWTH FOR 1988 WILL REACH 2% - THE FIRST REAL INCREASE SINCE 1984 - AND IS PROJECTED TO CONTINUE IN THE 2.5 - 3.0% RANGE THROUGH 1990. KEY FACTORS BEHIND THIS IMPROVEMENT ARE THE PROSPERITY OF THE TIMBER/PAPER INDUSTRIES, A BURGEONING "SERVICES" INDUSTRY, AND A ROBUST AGRICULTURE SECTOR WHICH ESCAPED RELATIVELY UNSCATHED FROM THE 1988 DROUGHT. UNEMPLOYMENT DECLINED 2% OVER THE PAST TWELVE MONTHS, REAL ESTATE REMAINS WEAK BUT STABLE AND THE FINANCIAL SERVICES SECTOR, WHILE STILL EXPOSED, IS BEING REORGANIZED ON "INSTITUTIONAL" RATHER THAN "INDIVIDUALISTIC" FOUNDATIONS WITH NEW CAPITAL INCREASINGLY AVAILABLE.

IN SUM, THE REGIONAL ECONOMY APPEARS TO HAVE BOTTOMED OUT WITH THE FUTURE PROSPECTS BRIGHT. THE WORKING POPULATION IS SIGNIFICANTLY BELOW NATIONAL AVERAGE IN AGE AND, WILL BE ONE OF THE TOP 25 U.S. "START-UP INDUSTRY" CITIES IN THE SOUTHWEST, THE GROWTH POTENTIAL IS HIGH. THE FEDERAL RESERVE PREDICTS POPULATION, EMPLOYMENT AND OVERALL GROWTH AT A RATE CONSISTENTLY ABOVE THE NATIONAL AVERAGE THROUGH THE MID 1990'S - EVEN WITHOUT SIGNIFICANT INCREASES IN OIL PRICE LEVELS.

OF PARTICULAR IMPORTANCE TO TID PROGRAM DEVELOPMENT IS THE EMERGENCE OF TEXAS AS A HIGH TECH GROWTH CENTER. TEXAS NOW RANKS SECOND ONLY TO CALIFORNIA IN DEFENCE PROCUREMENT EXPENDITURES AND BEHIND CALIFORNIA AND THE NORTHEAST AS THE THIRD LARGEST CONCENTRATION OF U.S. HIGH TECH DEVELOPERS AND PRODUCERS. WITH THE AWARD OF THE SUPER CONDUCTING SUPER COLLIDER - COMBINED WITH BOTH SEMATECH AND MCC - OBSERVERS NOW FEEL TEXAS' "SILICON PRAIRIE" WILL EQUAL THE OTHER TWO BY THE YEAR 2000. THE STATE IS ALREADY THE TOP PRODUCER OF PERSONAL COMPUTERS AND THE USAF TINKER AND KELLY AFB'S

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: DALLAS

Country: UNITED STATES OF AMERICA

ALONE REPRESENT A \$4.38 ANNUAL DEFENCE SPARE PARTS MARKET. POST TID SECTORAL EMPHASIS REMAINS AS LAST YEAR BUT WILL BE PURSUED WITHIN THE FRAMEWORK OF FOUR PRIMARY INITIATIVES: "NEXUS" INTRODUCING SUCCESSFUL "NORTHERN TIER" EXPORTERS TO THE REGION; NON-DEFENCE GOVERNMENT PROCUREMENT (BIOTECHNOLOGY SECTOR). THE POST WILL ALSO BE EXPLORING AND PROPOSING INNOVATIVE WAYS TO PROMOTE HIGH TECHNOLOGY (INFOMART INITIATIVE). THE PROGRAM HAS BEEN DEVELOPED IN CONSULTATION WITH THE TERRITORY OFFICES OF ONTARIO, ALBERTA AND QUEBEC.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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 reasons:

1. TRANSPORT SYS,EQUIP,COMP,SERV.
GSA REGION NO. 7, FT. WORTH, TEXAS IS THE LARGEST OF THE EIGHT GSA PROCUREMENT CENTERS AND THE POST WILL UNDERTAKE A MAJOR INITIATIVE TARGETING PURCHASES OF AUTOMOTIVE PARTS & EQUIP. WITH MAJOR PRODUCTION OF BOEING, CESSNA, BEECH AND GENERAL DYNAMICS IN TERRITORY, REGION REPRESENTS MAJOR SUB-CONTRACT POTENTIAL FOR AEROSPACE RELATED COMPANIES.
2. DEFENCE PROGRAMS,PRODUCTS,SERV
ACTIVITIES TARGET SUB-CONTRACT OPP AT MAJOR PROCUREMENT CENTERS (PARTICULARLY KELLY AFB & TINKER AFB) WHICH ACCOUNT FOR A SUBSTANTIAL PROPORTION OF USAF AIRFRAME/ENGINE SPARES. POST IS DEVELOPING A COMPREHENSIVE DATABASE ON TERRITORY DEF PRIME CONTRACTORS. TERRITORY WILL HOST DEF SUBCON & MILITARY TRAINING DEVICES SHOW IN FY 88/89.
3. ADVANCED TECH. PROD. & SERV
WITH THE AWARD TO TEXAS OF THE SUPER COLLIDING SUPER CONDUCTOR, AREA IS FINALLY ESTABLISHED AS THE THIRD MOST IMPORTANT HIGH TECH CENTER IN THE U.S. POST ACTIVITIES WILL BE AIMED AT BRINGING A SHARPER FOCUS ON THE JOHNSON SPACE CENTER RELATED SPACE EQUIPMENT PROCUREMENT PARTICULARLY SPACE STATION.
4. AGRI & FOOD PRODUCTS & SERVICE
AGRICULTURE CONCENTRATION IN THE TERRITORY PROVIDES A FERTILE MARKET FOR TILLAGE AND SHORT LINE IMPLEMENTS AS WELL AS LIVESTOCK. AS THE THIRD MOST POPULOUS STATE, TEXAS PROVIDES A GOOD MARKET FOR GOURMET AND PROCESSED FOODS AND HORTICULTURAL ITEMS.

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

- | | |
|-----------------------------------|-----------------------------------|
| 1. TRANSPORT SYS,EQUIP,COMP,SERV. | 4. MINE,METAL,MINERAL PROD & SRV |
| 2. FOREST PRODUCTS,EQUIP,SERVICES | 5. CHEM PROD & PETROCHEM,EQP,SERV |
| 3. ADVANCED TECH. PROD. & SERV | 6. INDUSTRIAL MACHIN,PLANTS,SERV. |

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DALLAS

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	1029.00 \$M	1050.00 \$M	1071.00 \$M	1092.00 \$M
Canadian Exports	35.00 \$M	44.00 \$M	50.00 \$M	55.00 \$M
Canadian Share of Market	3.41 %	4.19 %	4.67 %	5.04 %

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 %
UNITED KINGDOM	14.00 %
GERMANY WEST	5.00 %
JAPAN	4.00 %
MEXICO	3.00 %
FRANCE	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. TILLAGE, SEED & FERTILIZING
2. GRAIN HARVESTING & HANDLING
3. HAY & FORAGE HARVESTING
4. TRACTORS
5. VARIOUS COMPONENTS & 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
- 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: 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
- Performance of local agent or representative

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

Activity: ORG PPP EXH FOR 31 AGRIC MACH SHOW IN GARDEN CITY,KS(APR89)
Expected Results: NEW AGENCY/DISTRIBUTOR AGREEMENTS. PROJECTED SALES OF \$1 MILLION.

Activity: RECRUIT 6 DISTR/AG/REPS TO ATTEND WCFPS (JUNE 89)
Expected Results: 3 NEW AGREEMENTS SIGNED PROJECTED SALES \$60,000.

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

Activity: DEVELOP A PROFILE/DATA BASE OF LOCAL DISTR REPS IN TERRITORY
Expected Results: ENCOURAGE NEW DISTRIBUTION FOR CDN PRODUCT IN OTHER PARTS OF TERRITORY.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	800.00 \$M	900.00 \$M	1000.00 \$M	1200.00 \$M
Canadian Exports	28.00 \$M	23.40 \$M	19.00 \$M	25.20 \$M
Canadian Share of Market	3.50 %	2.60 %	1.90 %	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	75.00 %
JAPAN	25.00 %

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

Products/services for which there are good market prospects:

1. SEMICONDUCTORS
2. P C B'S

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- Fairs and Missions support
- Competitive pricing
- Strong sectoral capability in Canada
- Bilateral economic trade agreement
- Competitive Canadian financing
- Willingness of exporters to invest/joint venture in territory

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
- BUY AMERICA & SMALL
- BUSN SET ASIDES
- POOR FOLLOW UP.

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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: DEFENCE MARKET STUDY

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

Activity: ELECTRONIC MISSION (INCOMING) TO DALLAS
Expected Results: GENERATE \$10 MILLION IN ELECTRONICS SALES TO THE DEFENCE SECTOR.

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

Activity: COMMAND BRIEFINGS
Expected Results: RAISE AWARENESS OF CDN DEFENCE INDUSTRIAL BASE AND CCC.

Activity: DEFENCE COMPONENTS SHOW - DALLAS
Expected Results: GENERATE \$10 MILLION IN DEFENCE ELECTRONIC SALES.

Activity: ARMAX/HITECH OTTAWA (INCOMING MISSION)
Expected Results: GENERATE \$10 MILLION IN CDN DEFENCE SALES TO THE U.S.

Activity: INFOMART - SATELLITE OFFICE
Expected Results: NEW PROPOSAL

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DALLAS

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	500.00 \$M	600.00 \$M	700.00 \$M	800.00 \$M
Canadian Exports	5.00 \$M	6.00 \$M	9.10 \$M	11.20 \$M
Canadian Share of Market	1.00 %	1.20 %	1.30 %	1.40 %

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	5.00 %

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

Products/services for which there are good market prospects:

1. PYROTECHNICS
2. MISSILE COMPONENTS
3. TRAINING DEVICES

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- Fairs and Missions support
- Competitive pricing
- Strong sectoral capability in Canada
- Bilateral economic trade agreement
- Competitive Canadian financing
- Willingness of exporters to invest/joint venture in territory

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
- BUY AMERICA & SMALL
- BUSN SET ASIDE
- POOR FOLLOW UP.

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RPTCL

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: DEFENCE MARKET STUDY
Expected Results: DEFINE MARKET PREPARATORY TO DEVELOPMENT OF A COMPREHENSIVE PROGRAM.

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

Activity: COMMAND BRIEFINGS
Expected Results: RAISE UP DEFENCE PERSONNEL AWARENESS OF CDN DEFENCE INDUSTRIAL BASE & CCC.

Activity: DEFENCE COMPONENTS SHOW - DALLAS
Expected Results: GENERATE \$2 MILLION IN OTHER DEFENCE SALES.

Activity: ARMAX/ HITECH OTTAWA [INCOMING MISSION]
Expected Results: GENERATE \$1 MILLION IN CDN DEFENCE SALES TO SOUTHWEST

Activity: INFOMART - SATELLITE OFFICE
Expected Results: NEW PROPOSAL

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	1000.00 \$M	1200.00 \$M	1500.00 \$M	1800.00 \$M
Canadian Exports	70.00 \$M	75.00 \$M	80.00 \$M	85.00 \$M
Canadian Share of Market	0.07 %	0.06 %	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	90.00 %
EUROPEAN COMMON MARKET C	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. STRUCTURES
2. ENGINES - AIRCRAFT
3. AVIONICS
4. CASTINGS

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- Fairs and Missions support
- Competitive pricing
- Strong sectoral capability in Canada
- Bilateral economic trade agreement
- Competitive Canadian financing
- Willingness of exporters to invest/joint venture in territory

RPTCL

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
- BUY AMERICA & SMALL
- BUSN SET ASIDES.
- POOR FOLLOW UP.

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

Activity: DEFENCE MARKET STUDY
Expected Results: RAISE AWARENESS OF POTENTIAL AEROSPACE MARKET IN THE U.S.

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

Activity: HELICOPTER SHOW - NEW ORLEANS
Expected Results: GENERATE \$5 MILLION IN CDN HELICOPTER COMPONENT/DEM/R & O 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: ABBOTSFORD AIRSHOW MISSION (INCOMING)
Expected Results: RAISE US DEFENCE PERSONNEL AWARENESS OF CDN AEROSPACE SUPPLIERS.

Activity: DEFENCE COMPONENTS SHOW - DALLAS
Expected Results: GENERATE \$10 MILLION IN DEFENCE AEROSPACE COMPONENT SALES.

Activity: ARMAX/HITECH OTTAWA (INCOMING MISSION)
Expected Results: GENERATE \$10 MILLION IN CDN DEFENCE SALES TO THE U.S.

Activity: COMMAND BRIEFINGS
Expected Results: RAISE U.S. DEFENCE PERSONNEL AWARENESS OF CDN MILITARY SUPPLIERS.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	1500.00 \$M	1500.00 \$M	1800.00 \$M	2000.00 \$M
Canadian Exports	190.00 \$M	195.00 \$M	200.00 \$M	210.00 \$M
Canadian Share of Market	12.67 %	13.00 %	11.12 %	10.50 %

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	30.00 %
EUROPEAN COMMON MARKET C	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. ISDN
2. FIBRE OPTICS
3. CELLULAR PRODUCTS
4. NETWORKS

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- Fairs and Missions support
- Competitive pricing
- Strong sectoral capability in Canada
- Bilateral economic trade agreement
- Competitive Canadian financing
- 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:

- Import restrictions are a significant impediment in this sector
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored
- BUY AMERICA & SMALL
- BUSN SET ASIDES REST
- PDDR FOLLOW UP.

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

Activity: DEFENCE ELECTRONIC/TELECOMMUNICATION MISSION (OUTGOING)
Expected Results: GENERATE \$10 MILLION IN TELECOMMUNICATION PRODUCTS SALES TO THE U.S.

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

Activity: ARMAX/HITECH OTTAWA (INCOMING MISSION)
Expected Results: GENERATE \$10 MILLION IN TELECOMMUNICATION SALES TO THE SOUTHWEST.

Activity: COMMAND BRIEFINGS
Expected Results: RAISE U.S. DEFENCE PERSONNEL AWARENESS OF CDN SUPPLIERS.

Activity: INFOMART - SATELLITE OFFICE
Expected Results: NEW INITIATIVE

Activity: CDN COMPONENTS SHOW - DALLAS
Expected Results: GENERATE \$10 MILLION IN TELECOMMUNICATIONS SALES TO THE SOUTHWEST.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	2.00 \$M	2.20 \$M	2.30 \$M	2.40 \$M
Canadian Exports	40.00 \$M	45.00 \$M	50.00 \$M	52.00 \$M
Canadian Share of Market	2.00 %	2.05 %	2.18 %	2.17 %

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	25.00 %

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

Products/services for which there are good market prospects:

1. SUPERMINIS
2. NETWORKS
3. SOFTWARE

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- Fairs and Missions support
- Competitive pricing
- Strong sectoral capability in Canada
- Bilateral economic trade agreement
- Competitive Canadian financing
- Willingness of exporters to invest/joint venture in territory

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
- BUY AMER & SMALL BUSS
- SET ASIDE WITH RESP
- POOR FOLLOW UP

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DALLAS

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: SOFTWARE MISSION [OUTGOING] TO DALLAS
Expected Results: GENERATE \$5 MILLION IN CDN SOFTWARE SALES.

Activity: DEFENCE COMPONENT SHOW-DALLAS.
Expected Results: GENERATE \$2 MILLION IN COMPUTER SOFTWARE SALES.

Activity: ARMAX/HITECH OTTAWA [INCOMING MISSION]
Expected Results: GENERATE \$5 MILLION IN CDN COMPUTER/SOFTWARE SALES TO THE U.S.

Activity: INFOMART - SATELLITE OFFICE
Expected Results: NEW PROPOSAL

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	50.00 \$M	50.00 \$M	52.00 \$M
Canadian Exports	22.00 \$M	25.00 \$M	25.00 \$M	26.00 \$M
Canadian Share of Market	44.00 %	50.00 %	50.00 %	50.00 %

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 %
BELGIUM	4.00 %
KOREA	4.00 %
FRANCE	2.00 %
SWEDEN	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. DRILLING EQUIPMENT
2. RESCUE BOATS
3. SHIP CONTROLS
4. EQUIPMENT FOR FLOATING DRILL RIGS

Factors contributing to current successful Canadian exports:

- Import duties are low
- 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: 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
- Performance of local agent or representative
- JONES ACT

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

Activity: OFFSHORE TECHNOLOGY CONFERENCE
Expected Results: TO IDENTIFY NEW PROJECTS & EVENTS FOR CDN MANUFACTURERS PARTICIPATION.

Activity: WORK BOAT SHOW
Expected Results: TO INCREASE SALES & AGENT. \$500K NEW SALES & 5 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: CALLS ON OFFSHORE DRILLING CONTRACTORS
Expected Results: TO BE MORE OF THESE ACTIVITIES & ENCOURAGE THEM TO USE CDN PRODUCTS.

Activity: CALLS TO THIRD COUNTRY PROCUREMENT OFFICES
Expected Results: TO ENCOURAGE CDN SOURCING.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	1600.00 \$M	1400.00 \$M	1600.00 \$M	1600.00 \$M
Canadian Exports	12.50 \$M	13.00 \$M	13.30 \$M	13.50 \$M
Canadian Share of Market	0.79 %	0.93 %	0.84 %	0.85 %

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	19.00 %
GERMANY WEST	7.00 %
UNITED KINGDOM	6.00 %
KOREA	4.00 %
BELGIUM	3.00 %

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
2. INSTRUMENTATION

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Import duties are low
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Trade Fair activity
- Provincial export promotion
- Competitive pricing

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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
- Performance of local agent or representative

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

Activity: SOCIETY OF PETROLEUM ENGINEERS
Expected Results: 8 NEW AGENCIES. \$300,000 IN NEW SALES [12 MONTHS]

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

Activity: DEVELOP A COMPREHENSIVE LIST OF BUY & SPECIF IN THE OIL IND.
Expected Results: PREPARE PRINTED COPIES FOR CIRCULATION TO CDN INDUSTRY.

Activity: UNDERTAKE PROGRAM OF VISITS TO LARGE "INDEPENDENTS"
Expected Results: PREPARE REPORT FOR DISTRIBUTION TO CDN SUPPLIERS.

Activity: RECRUIT INCOMING BUYERS FOR THE "INTERCAN" SHOW.
Expected Results: \$500 K IN NEW SALES.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	0.00 \$M	23.40 \$M	25.30 \$M	27.50 \$M
Canadian Exports	0.00 \$M	4.10 \$M	6.25 \$M	12.00 \$M
Canadian Share of Market	0.00 %	0.02 %	0.02 %	0.04 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	95.00 %
JAPAN	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. OPERATING THEATRE EQUIPMENT
2. PHARMACEUTICALS
3. REHABILITATION EQUIPMENT.
4. ALL-TERRAIN WHEEL CHAIRS

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Import duties are low
- Aggressive marketing
- Trade Fair activity
- Competitive pricing
- Willingness of exporters to invest/joint venture in territory

Factors for Canadian exports not reaching market potential:

- Restrictive standards
- 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: DALLAS

Market: UNITED STATES OF AMERICA

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

Activity: AMERICAN SOCIETY OF MICROBIOLOGY EXHIBITION

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

Activity: PRESENTATION TO BIOTECH FORUM IN HOUSTON

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RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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
Current year	3000.00	5.00	10.00
One year ago	2000.00	5.00	10.00
Two years ago	2000.00	5.00	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:

\$ 150 MILLION JOINT VENTURE, PORTFOLIO AND ACQUISITION.

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

- MEXICO
- EEC
- SAUDI ARABIA
- INDONESIA

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

- MEXICO - HAS ESTABLISHED THE "MAQUILLADORA" PLAN TO ATTRACT MANUFACTURING/ASSEMBLY INDUSTRIES IN THE NORTHERN BORDER AREAS AIMED AT COMPONENT AND END PRODUCT PRODUCTION FOR THE U.S. UNDER DUTY/TAX FREE CONDITIONS.

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: DALLAS

Country: UNITED STATES OF AMERICA

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

- HIGH ENERGY RESOURCE POTENTIAL
- HIGH ENERGY RESOURCE POTENTIAL
- HIGH ENERGY RESOURCE POTENTIAL

the following constraints:

- GOVERNMENT ENERGY MARKET INTERVENTION.

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

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

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

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

Post : DALLAS

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Post/Contact</u>
89/04/26	3I AGRICULTURAL SHOW GARDEN CITY, KANSAS FAIR, NATIONAL STAND	AGRI & FOOD PRODUCTS & SERVICE
89/05/01	OFFSHORE TECHNOLOGY CONFERENCE (OTC'89) HOUSTON, TEXAS FAIR, NATIONAL STAND	OIL & GAS EQUIPMENT, SERVICES M. BIEMAN
89/06/21	MISSION FROM U.S.A. TO WESTERN CANADA FARM PROGRESS SHOW MISSION IN, TO FAIR	AGRI & FOOD PRODUCTS & SERVICE
90/03/05	INTERFACE'90 - COMPUTER SHOW, DALLAS FAIR, NATIONAL STAND	ADVANCED TECH. PROD. & SERV K. MUNRO

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: DETROIT

Country: UNITED STATES OF AMERICA

MICHIGAN AND INDIANA'S ECONOMIES IN 1988 CONTINUED TO OUTPACE THE NATION'S AND THEIR OUTLOOK FOR 1989 IS MORE OF THE SAME THOUGH SOME SOFTENING IN THE AUTO MARKET IS EXPECTED. AS ABOUT 25% OF CANADA'S TOTAL TRADE WITH THE USA IS CONDUCTED BY OUR TWO STATE TERRITORY, CANADIAN TRADE PROSPECTS IN 1989 LOOK GOOD.

WE RECOMMEND, HOWEVER, OPENING A ONE MAN MINI-OFFICE IN INDIANAPOLIS TO BETTER EXPLOIT TERRITORIAL TRADE OPPORTUNITIES. INDIANA IS AMONGST THE TOP TEN STATES IN TWO WAY TRADE WITH CANADA (LARGER THAN TEXAS AND TWICE THAT OF FLORIDA AND MISSOURI); IT HAS WELL DEVELOPED AUTOMOTIVE AND DEFENCE MARKETS; AND IS AN IMPORTANT REGIONAL DISTRIBUTION CENTRE. INDIANA'S PROXIMITY TO SW ONTARIO AND DIRECT AIR SERVICE WITH TORONTO DEMONSTRATE ATTRACTIVE TOURISM POTENTIAL. CONVERSELY, EXISTING PERSONAL RESOURCES COULD BE DEPLOYED MORE EFFECTIVELY IN TOLEDO AND MICHIGAN (OUR LARGEST TWO WAY STATE TRADE PARTNER).

THE AUTO INDUSTRY REMAINS KING IN OUR TERRITORY. AS 80% OF CANADA'S AUTO EXPORTS HAVE A TERRITORY DESTINATION AND IT REMAINS CANADA'S LARGEST EXPORT SECTOR, OUR SEVEN PERSON TRADE PROGRAM STAFF ALLOCATES ABOUT 70% OF ITS TIME TO THIS INDUSTRY GROUP. HOWEVER, TO THE AUTO PARTS (APMA) SUPPORT TO US, MORE RESOURCES (PY AND BUDGET) COULD BE EFFECTIVELY EMPLOYED AS THE RUST-BELT IMAGE ASSOCIATED WITH MICHIGAN FOR TWO DECADES IS DISPLACED BY A REJEUVENATED DIVERSE ECONOMIC POWER IMAGE WHICH IMPORTS MORE CANADIAN PRODUCT THAN ANY OTHER STATE. THE NORTH AMERICAN AUTOMOBILE INDUSTRY HAS BEEN SYSTEMATICALLY REBUILT AND MICHIGAN WILL BUILD MORE PASSENGER CARS ON PERCENTAGE BASIS IN THE 90'S THAN IN THE 60'S AND 70'S. MOREOVER MANUFACTURING (1977-86) DECREASED ITS SHARE OF GROSS STATE PRODUCT BY 10% (41 TO 31%) WHILE THE FINANCES AND SERVICES SHARES INCREASED FROM 22 TO 31%.

MICHIGAN WILL, THEREFORE, BE MORE IMMUNE FROM THE BUSINESS CYCLE WHILE ITS TECHNOLOGY AND CAPITAL BASES HAVE BECOME THE NATION'S LEADERS. CANADIANS HAVE BENEFITED IN THIS EVOLUTION SUCH AS THE GM COMPLEX IN OSHAWA. HOWEVER, CANADIANS INVOLVED IN TECHNOLOGY NEED TO BE MORE APPRECIATIVE OF MICHIGAN'S CAPABILITY SO WE WILL INCREASE OUR RELATED COMMITMENT. THE DEFENCE SECTOR IS LINKED TO THE AUTOMOTIVE AND TECHNOLOGY DEVELOPMENT REMARKS SO WE WILL RETAIN OUR RESOURCE ALLOCATION TO IT.

MICHIGAN'S PROXIMITY TO CANADA, ABUNDANT DISPOSABLE INCOME AND DEMOCRATICS (INCREASING NUMBERS OF PLUS 35'ERS) EXPLAINS ITS NUMBER ONE STATE SOURCE OF TOURISTS FOR CANADA, IN 1988 THE POST INCREASED ITS TOURISM ACTIVITIES BY 30% AND WITH SOME BUDGET INCREASE COULD INCREASE THAT BY A LIKE AMOUNT IN 1989. NO OTHER POST IN THE WORLD OFFERS MORE IMMEDIATE POTENTIAL TO INCREASE TOURISM TRAFFIC.

REFLECTING THE ECONOMIC DIVERSIFICATION OF OUR TERRITORY WE WILL EXPAND OUR FOLLOW UP ACTIVITIES AND DEVELOP QUALITY PROGRAMS IN AGRICULTURE AND CONSUMER GOODS. MICHIGAN AND INDIANA HAVE SUBSTANTIVE AGRICULTURAL INDUSTRIES OFFERING OPPORTUNITIES TO CANADIAN SUPPLIERS IN FOOD PROCESSING INDUSTRIES. MICHIGAN HAS AN ECONOMY ROUGHLY EQUAL TO ONTARIO'S AND GREATER DETROIT IS ABOUT 50% LARGER THAN TORONTO SO THAT OPPORTUNITIES FOR OUR

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: DETROIT

Country: UNITED STATES OF AMERICA

FOOD AND GROCERY PRODUCERS ARE ENORMOUS. SIMILARLY, WITH FIRMS LIKE K-MART (SOON TO OVERTAKE SEARS' SALES) AND FURNITURE GIANTS LIKE STEELCASE, OUR PROSPECTS IN CONSUMER GOODS ARE EXCELLENT. FINALLY, THE FTA PERMEATED OUR WORK PROGRAM IN 1988 AND WILL DO SO EVEN

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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 \$200 BILLION. AUTOPACT AND PROPOSED F.T.A. GUARANTEE MARKET ACCESS FOR CANADIAN SUPPLIERS.
2. DEFENCE PROGRAMS,PRODUCTS,SERV
THIS TERRITORY INCLUDES 3 U.S. MILITARY INSTALLATIONS WITH COMBINED ANNUAL PROCUREMENT BUDGETS IN EXCESS OF U.S. \$5 BILLION. MARKET IS FIERCELY COMPETITIVE BUT MANY SOLICITATIONS ARE REPEATED. EXCELLENT OPPORTUNITIES FOR SUB-CONTRACTING TO U.S. PRIMES CURRENTLY EXIST AND WILL BE ENHANCED BY CANADIAN FORCES RE-EQUIPMENT PROGRAMS.
3. AGRI & FOOD PRODUCTS & SERVICE
AGRICULTURE AND FOOD PROCESSING, OUR THIRD LARGEST INDUSTRY IN TERRITORY; INSTITUTIONAL AND RETAIL FOOD SALES ARE IN EXCESS OF \$3 BILLION. IN MICHIGAN THERE ARE OPPORTUNITIES WHICH EXIST FOR RAW MATERIALS AND EQUIPMENT.
4. 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". 10 OF THE 11 LARGEST INDUSTRIAL ROBOT MANUFACTURERS ARE LOCATED IN OUR TERRITORY.
5. INDUSTRIAL MACHIN,PLANTS,SERV.
S.E. MICHIGAN HAS OVER 330 ADVANCED MANUFACTURING TECHNOLOGY COMPANIES WITH 33,000+ EMPLOYEES AND OVER \$5 BILLION IN SALES, 60% IS AUTOMOTIVE RELATED MANUFACTURING.
6. CONSUMER PRODUCTS & SERVICES
HIGH AS THE HUB OF N AMERICAN AUTO IND., COMBINED W/THE VERY IMPORTANT SUPPORT INDS.,HIGH TECH & IND'L MACH, ARE MAKING ADVANCES IN RESTRUC-TURING & BECOMING GLOBALLY COMPETITIVE. THESE FACTORS INCLUDING A BLDG BOOM IN THE SUBURBS OF DETROIT HAVE CONTRIBUTED TO A STABLE ECONOMY, CONSUMER CONF & PROJ'D GROWTH IN CONSUMER GOODS SECT FOR POST TERRIT.

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

89/90 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	2800.00 \$M	0.00 \$M	0.00 \$M
Canadian Exports	320.00 \$M	320.00 \$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. FISH AND SEAFOOD
2. PROCESSED FOOD
3. ALCOHOL
4. FOOD SERVICE 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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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: SOLO FOOD SHOW - DETROIT

Expected Results: INTRODUCE CDN SUPPLIERS TO DISTRIBUTORS, WHOLESALERS AND BROKERS AND FOOD STORES IN TERRITORY.

Activity: WINE PROMO AT ANNUAL ASSOC FOOD DEALERS ASSOC BROKERS, HOTEL

Expected Results: 3 NEW WINE PRODUCTS INTRODUCED INTO TERRITORY.

Activity: 7 INFORMAL PRES OF FOOD PROD TO AGENTS IN DETR W/SIMILAR PRO

Expected Results: INCREASED PROFILE OF PROCESSED FOODS AND ENTRY OF 8 NEW PRODUCTS.

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 FOOD SERVICE EQUIPMENT.

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

Activity: SOLO FOOD SHOW - INDIANAPOLIS

Expected Results: INTRODUCE CDN SUPPLIERS TO ASSOCIATED DEALERS IN INDIANAPOLIS.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DETROIT

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	0.00 \$M	3000.00 \$M	0.00 \$M	0.00 \$M
Canadian Exports	55.00 \$M	57.00 \$M	60.00 \$M	0.00 \$M
Canadian Share of Market	20.00 %	20.00 %	20.00 %	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	80.00 %

Products/services for which there are good market prospects:

1. FRESH FISH/FROZEN FISH
2. FROZEN PROCESSED FISH
3. SHELLFISH

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

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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: REP. ON PROS. UPDATE OF FDA REGULATIONS FOR COLD PROC. FISH
Expected Results: NEW MARKET FOR PRODUCT IN MICHIGAN.

Activity: INTRO SEAFOOD PROD TO WHOLESALERS, GROCERY CHAINS & REST.
Expected Results: ENTRY OF 5 NEW FIRMS INTO 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: EXPL FURTHER THE POT OF FISH FARMING OF PERCH TO BE EXPORTED
Expected Results: EXCELLENT OPPORTUNITIES FOR NEW EXPORTERS & POTENTIAL NEW INVESTMENT OPPORTUNITIES.

Activity: CONTINUE UPGRADE OF SECTOR CONTACTS FOR MARKET INTELLIGENCE
Expected Results: ENTRY OF 3 NEW FIRMS INTO MARKET.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	570.00 \$M	300.00 \$M	300.00 \$M	300.00 \$M
Canadian Exports	285.00 \$M	110.00 \$M	110.00 \$M	100.00 \$M
Canadian Share of Market	50.00 %	36.00 %	36.00 %	33.00 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	95.00 %
ISRAEL	1.00 %
SWEDEN	1.00 %
UNITED KINGDOM	1.00 %
GERMANY WEST	1.00 %

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

Products/services for which there are good market prospects:

1. AUTOMOTIVE PARTS
2. ARMOURED VEHICLES
3. OVERSNOW VEHICLES
4. SPECIALIZED TRUCKS/TRAILERS
5. ELECTRONIC COMPONENTS
6. SONOBUOYS
7. VEHICLE HEATERS
8. AVIONICS EQUIPMENT
9. BOMB RACKS
10. ARMOUR PLATE
11. PNEUMATIC TIRES
12. ROAD WHEELS/TRACK

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: DETROIT

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
- 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:

- 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: CONTACTS AT COMPANIES INVOLVED IN U.S. MILITARY PRODUCTION
Expected Results: INCREASED SUBCONTRACTING OPPORTUNITIES FOR CDN COMPANIES

Activity: I.D. & RECOMMEND POTENTIAL INT. DEV. PROJECTS
Expected Results: ADDITIONAL OPPORTUNITIES FOR CDN PARTICIPATION IN U.S. R & D PROJECTS & SUBSEQUENT PRODUCTION.

Activity: INCREASE AWARENESS OF DDSA, OPSA AND CDN INDUSTRIAL CAPAB.
Expected Results: ADDITIONAL SALES OPPORTUNITIES.

Activity: PROGRAM TO EXHIBIT CDN VEHICLES PRODUCT & TECHNOLOGY
Expected Results: ENHANCED AWARENESS OF CDN PRODUCTS & CAPABILITIES. ADDITIONAL JOINT DEVELOPMENT POSSIBILITIES.

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: INCOMING DEFENCE PRODUCTS MISSION, MAY '89
 Expected Results: IMPROVED INDUSTRY CONTACTS. NEW ORDERS PLACED WITH CDN CO.

Activity: DEFENCE PRODUCTS SEMINARS - MICHIGAN AND INDIANA
 Expected Results: INCREASED AWARENESS OF CDN PRODUCTS AND CAPABILITIES.

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

FAMILY OF MEDIUM TACTICAL VEHICLES (SUBCONTRACTING)	Approximate Value: 275000 M\$ Financing Source : DOM - Domestically funded Contact : D. W. SHEARER (313-574-5233) (313-567-2340)
MIAI ABRAMS MAIN BATTLE TANK (SUBCONTRACTING)	Approximate Value: 6000 M\$ Financing Source : DOM - Domestically funded Contact : D. W. SHEARER (313-574-5233) (313-567-2340)
LIGHT AND HEAVY TACTICAL VEHICLES	Approximate Value: 1000 M\$ Financing Source : DOM - Domestically funded Contact : D. W. SHEARER (313-574-5233) (313-567-2340)
MIAI TANK BLOCK IMPROVEMENTS (DEVELOPMENT SHARING)	Approximate Value: 1000 M\$ Financing Source : DOM - Domestically funded Contact : D. W. SHEARER (313-574-5233) (313-567-2340)

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	2600.00 \$M	2775.00 \$M	2800.00 \$M	2900.00 \$M
Canadian Exports	62.40 \$M	62.45 \$M	62.50 \$M	62.50 \$M
Canadian Share of Market	2.40 %	2.30 %	2.23 %	2.22 %

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 %
WEST 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. WORK PLACE AUTOMATION
2. ELECTRONIC COMPONENTS
3. TELECOMMUNICATIONS.
4. ROBOTICS/A. I.
5. APPLICATIONS (NICHE) SOFTWARE
6. REMOTE SENSING PRODUCTS
7. INSTRUMENTATION/PROCESS CONTROLS

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
- COST OF RAW MATERIALS. GEOGRAPHICS
- PLAY A MAJOR ROLE IN 4 (I)

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

Activity: ADDRESS STATE CHAPTERS OF ELECTRONIC REPRESENTATIVES ASS.
Expected Results: FIND ADDITIONAL QUALIFIED LINES OF DISTRIBUTION FOR CDN CO.

Activity: SEMINAR IN ANN ARBOR ADDRESSING INVEST & JV OPPORT. IN CDA
Expected Results: DRAW 2 TO 3 VIABLE INVESTMENT LEADS FROM THE HIGH-TECH COMMUNITY SURROUNDING U. OF M.

Activity: FINALIZE AGREE TO COVER DATA SHARING & REPRES RIGHTS IN N.A.M
Expected Results: TECHNICAL DATA SHARING BETWEEN 2 NATIONAL TRADE ASSOCIATIONS AND AN AGREEMENT OF JOINT REPRESENTATION.

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

Activity: AUTOFACT '89
Expected Results: COST SHARE A TRADE BOOTH WITH 4 TO 6 CDN CO'S IN THE FIELD OF C.I.M. \$500,000 TO \$1M IN SALES TO RESULT.

Activity: ROBOT 13/VISION '90
Expected Results: COST SHARE A TRADE BOOTH WITH 3-5 CDN CO. IN ROBOTICS FIELD.

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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: FOLLOW-UP PLANT VISITS WITH U.S. FIRMS INV. WITH SUBCON. CON
Expected Results: BETTER UNDERSTANDING OF SPECIFIC SOURCING REQUIREMENTS.
SOURCING ASSIS. PROV. BY CONGEN 6-7 BUYING CONTRACTS MADE.

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	175000.00 \$M	170000.00 \$M	161000.00 \$M	162000.00 \$M
Canadian Exports	21300.00 \$M	21200.00 \$M	21300.00 \$M	21300.00 \$M
Canadian Share of Market	12.00 %	12.50 %	13.20 %	13.20 %

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

Major Competing Countries Market Share

UNITED STATES OF AMERICA	54.00 %
JAPAN	22.60 %
WEST EUROPE	7.80 %
JAPAN	2.60 %

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

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing

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: PRODUCTION AND PUBLICATION OF QUARTERLY NEWSLETTER
Expected Results: TO INFORM CANADIAN INDUSTRY OF MISSION ACTIVITIES & VIEWPOINTS PERTAINING TO THE AUTOMOTIVE SECTOR

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 CDN TECHNOLOGY CAPABILITIES & PARTS PRODUCTION

Activity: MAJOR SEMINAR FUNCTION DURING SAE WEEK
Expected Results: PROMOTE "BUYING CONNECTION" BETWEEN CDN/U.S. FIRMS

Activity: "AUTOMOTIVE BUSINESS OPPORTUNITIES IN CANADA" BOOKLET
Expected Results: TO PROMOTE THE CAPABILITIES OF CDN PARTS MANUFACTURERS TO POTENTIAL U.S. CUSTOMERS

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
Expected Results: PROMOTE THE MARKETING EFFORTS OF CDN PARTS PRODUCERS

Activity: ENHANCE RELATIONS BETW SR. GOV'T OFF & AUTO CO. IN TERRITORY
Expected Results: BETTER UNDERSTANDING OF U.S. INDUSTRY CONCERNS.

Activity: ANNUAL APMA OF CANADA DIRECTORS' MEETING IN DETROIT
Expected Results: PROMOTE IMPORTANCE OF U.S. MARKET TO APMA MEMBERS.

Activity: LIAISON WITH UNIVERSITY OF MICHIGAN, DEPT. OF TRANSPORT
Expected Results: BUILD A WORKING RELATIONSHIP WITH THIS PRESTIGIOUS BODY AND SHARE WITH THEM A CDN PERSPECTIVE OF THE AUTO INDUSTRY.

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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 still in the planning stage which provide opportunities for Canadian suppliers:

SATURN CORPORATION
(DIV. OF G.M.)

Approximate Value: 0 M\$
Financing Source :
Contact : R.P. ROBERTSON (313-567-2340)

ISUZU/FUJI (INDIANA)

Approximate Value: 0 M\$
Financing Source :
Contact : R. P. ROBERTSON (313-567-2340)

MANY JAPANESE/U.S. JOINT
VENTURE COMPANIES

Approximate Value: 0 M\$
Financing Source :
Contact : R. P. ROBERTSON (313-567-2340)

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	1000.00 \$M	1100.00 \$M	1110.00 \$M
Canadian Exports	440.00 \$M	464.00 \$M	460.00 \$M	461.00 \$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	55.00 %
EUROPEAN COMMON MARKET C	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. DIMENSIONED WOOD
2. RE-MAN PRODUCTS
3. VENEER

Factors contributing to current successful Canadian exports:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: 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: MARKET PROFILE FOR WOOD PRODUCTS SECTOR
Expected Results: FOR USE AS MARKET IDENTIFICATION TOOL FOR CDN FIRMS NOT CURRENTLY SELLING IN TERRITORY.

Activity: CONT VISITATION PROG TO LOCAL BROKERS/WHOLESALERS BUYING GRP
Expected Results: IDENTIFICATION OF NEW PRODUCT NEEDS, MONITOR CONTINUED EFFECT OF EXPORT TAX.

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 OF NEW PRODUCTS AND OPPORTUNITIES.

Activity: MICHIGAN LUMBER AND BUILDING MATERIAL ASSOCIATION CONVENTION
Expected Results: 10 NEW AGENCIES.

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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 still in the planning stage which provide opportunities for Canadian suppliers:

CONT. EXPANSION OF PRODUCTION OF FURNITURE BY STEELCASE	Approximate Value: 0 M\$
	Financing Source : DOM - Domestically funded
	Contact : J. LAMBERMONT (313) 567-2340

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: DETROIT

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	0.00 \$M	50.00 \$M	55.00 \$M	60.00 \$M
Canadian Exports	10.00 \$M	12.00 \$M	15.00 \$M	18.00 \$M
Canadian Share of Market	0.00 %	24.00 %	27.00 %	28.00 %

Major Competing Countries

Market Share

FINLAND	37.00 %
JAPAN	17.00 %
SWEDEN	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. GRAPPLE SKIDDERS
2. PULP MILL EFFLUENT CONTROL EQUIPMENT
3. TREE BALERS (FOR CHRISTMAS TREES)
4. DEBARKERS
5. 4 WHEEL DRIVE (OFF-HIGHWAY VEHICLES)

Factors contributing to current successful Canadian exports:

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

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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: ATTENDANCE AT LOCAL INDUSTRY CONVENTION & EXPO
Expected Results: RAISE PROFILE OF CDA'S EQUIPMENT MANUFACTURING SECTOR

Activity: LOGGING CONGRESS, SEPTEMBER, MARQUETTE, MI

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

DEV'T OF COMPOSITE WOOD PANEL	Approximate Value:	0 M\$
IND. IN MI. UPPER PENINSULA	Financing Source :	DOM - Domestically funded
	Contact	: J. LAMBERMONT (313) 567-2340

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	0.00 \$M	4000.00 \$M	0.00 \$M	0.00 \$M
Canadian Exports	40.50 \$M	54.20 \$M	60.00 \$M	0.00 \$M
Canadian Share of Market	10.00 %	12.00 %	12.00 %	0.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	85.00 %
EUROPEAN COMMON MARKET C	3.00 %
JAPAN	2.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. APPAREL
2. CONTRACT FURNITURE
3. RESIDENTIAL FURNITURE
4. LEISURE PRODUCTS
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: PROMOTE & REVIEW CDN PRODUCTS AT NATIONAL SPORTING GOODS ASS
Expected Results: NEW AGENCY AGREEMENTS - I.E. EXPANDED REPRESENTATION FOR CDN PRODUCTS.

Activity: DEVELOP NEW PROGRAM FOR CDN PRODUCTS - INTRODUCTORY DAYS
Expected Results: CREATE PROFITABLE OPPORTUNITY FOR CDN CONSUMER PRODUCTS TO PENETRATE.

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

Activity: IIDEX '88
Expected Results: INTRODUCE 8 NEW DESIGNER/SPECIFIERS TO CDN CONTRACT FURNITURE MANUFACTURERS AT ANNUAL TRADE FAIR.

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 TERRITORY
Expected Results: MAINTAIN CURRENT LEVELS OF CONTACTS FOR INCOMING MISSIONS & MARKET INTELLIGENCE FOR NEW EXPORTERS.

Activity: DEVELOP MARKET STUDY ON RETAIL TRADE IN TERRITORY

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	0.00 \$M	999999.00 \$M	999999.00 \$M	999999.00 \$M
Canadian Exports	0.00 \$M	380000.00 \$M	360094.00 \$M	360094.00 \$M
Canadian Share of Market	0.00 %	4.50 %	4.20 %	4.00 %

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

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. METALWORKING PRESSES
3. CONVEYING SYST IN AUTOMATION TOOLS, DIES & MOULD'S
4. CASTINGS AND FORGINGS

Factors contributing to current successful Canadian exports:

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

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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:

- Non-competitive pricing
- Lack of promotion and advertising
- Limited Canadian capabilities
- Performance of local agent or representative
- GEO LOCATION & \$ OF RAW MATERIALS
- LACK OF GOV'T INDUST. PLAN FOR DEV

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

Activity: CANVASS OF AUTOMOTIVE PLANT PURCHASING SECTOR FOR QUOTATIONS
Expected Results: NOTICE OF NEW REQUESTS AND REQUIREMENTS FOR MAJOR EXPANSION PROJECT.

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

Activity: MAINTAIN CONSTANT CONTACTS W/PURCHASING SECT IN AUTO, PULP
Expected Results: APPOINTMENT OF 2 NEW MFRS REPS IN PULP & PAPER SECTOR AND OPPORTUNITY TO QUOTE ON NEW MCHY & EQUIP. REQUIREMENTS

Activity: ASSIST MOLDMAKERS WITH PROMO. PROGRAM TO MAJOR INDUSTRY
Expected Results: SUBSTANTIAL NEW EXPORT BUSINESS

Activity: MONITOR MACHINERY MARKET AS REPORTED IN SURVEY & RECORD NEW

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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 still in the planning stage which provide opportunities for Canadian suppliers:

JEFFERSON AVENUE CHRYSLER
PLANT, DETROIT, MI

Approximate Value: 0 M\$
Financing Source :
Contact : PETER WRIGHT (313-567-2340)

CHRYSLER TECHNICAL CENTER

Approximate Value: 0 M\$
Financing Source :
Contact : PETER WRIGHT (313-567-2340)

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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:

\$3 BILLION

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

- MICHIGAN & INDIANA
- BORDERING STATES [OHIO, ILLINOIS]
- SUN BELT [SOUTHERN] STATES [KENTUCKY, TENNESSEE]
- MEXICO

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

- MEDIA ADVERTISING
- TRADE SHOWS
- INCOMING & OUTGOING MISSIONS
- LOCAL PUBLIC ACTION GROUPS

Compared to major competitive destinations, Canada is perceived to have

the following advantages:

- FULLY DEVELOPED STABLE NATION W/WELL-ESTABLISHED INFRASTRUCTURE
- EASE & ACCESS [GEOGRAPHIC PROXIMITY & MINIMAL BORDER CROSS-
- EASE & ACCESS [GEOGRAPHIC PROXIMITY & MINIMAL BORDER CROSS-
- QUALITY OF LIFE [SAFETY & SECURITY] COMPETITIVELY AVAILABLE
- QUALITY OF LIFE [SAFETY & SECURITY] COMPETITIVELY AVAILABLE

the following constraints:

- LABOUR, PERCEPTION OF UNION CLIMATE [CAW] & COST OF WAGE/
- LABOUR, PERCEPTION OF UNION CLIMATE [CAW] & COST OF WAGE/
- EASE & ACCESS [GEOGRAPHIC PROXIMITY & MINIMAL BORDER CROSS-
- EASE & ACCESS [GEOGRAPHIC PROXIMITY & MINIMAL BORDER CROSS-
- LACK OF LOCAL INCENTIVES [I.E. MUNICIPAL TAX ABATEMENTS]

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: DETROIT

Country: UNITED STATES OF AMERICA

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	HIGH
Joint Venture	HIGH
Strategic Partnering	HIGH
Technology Licensing	HIGH

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

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

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: DETROIT

Country: UNITED STATES OF AMERICA

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

	Date
Type: INFO BOOTH, ONLY	
TARGET MFG SECTOR	5/89
Location: INDIANOPGLIS	
Invest Nature: GREENFIELD	
Sector: INDUSTRIAL MACHIN, PLANTS, SERV.	
Cooperants: PROV. GOVT.	
Estimated Budget: \$13,000.00	
TARGET MFG SECTOR	5/89
Location: DETROIT	
Invest Nature: JT VENTURE	
Sector: INDUSTRIAL MACHIN, PLANTS, SERV.	
Cooperants: E.D.O. & PROV. GOVT.	
Estimated Budget: \$12,000.00	
TARGET MFG SECTOR	9/89
Location: GRAND RAPIDS	
Invest Nature: GREENFIELD & ACQUISITION	
Sector: INDUSTRIAL MACHIN, PLANTS, SERV.	
Cooperants: E.D.O. & PROV. GOVT.	
Estimated Budget: \$13,000.00	
MFG. PROCESSES	11/89
Location: DETROIT	
Invest Nature: TECH LICENSING STRAT. PARTNER	
Sector: ADVANCED TECH. PROD. & SERV	
Cooperants: PROV. GOVT. & REG. ECON. COMMISSIONERS	
Estimated Budget: \$12,000.00	
AUTO IND FOCUS	2/90
Location: DETROIT	
Invest Nature: GREENFIELD & JT VENTURE	
Sector: TRANSPORT SYS, EQUIP, COMP, SERV.	
Cooperants: A.P.M.A.	
Estimated Budget: \$20,000.00	

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: DETROIT

Country: UNITED STATES OF AMERICA
Date

Type: SEMINAR, ABROAD

AUTO IND FOCUS	2/90
Location: DETROIT	
Invest Nature: GREENFIELD & JT VENTURE	
Sector: TRANSPORT SYS,EQUIP,COMP,SERV.	
Cooperants: A.P.M.A.	
Estimated Budget: \$17,500.00	
AUTO PARTS	6/89
Location: TOLEDO	
Invest Nature: ACUITION & JT VENTURE	
Sector: TRANSPORT SYS,EQUIP,COMP,SERV.	
Cooperants: PROV. GOVT.	
Estimated Budget: \$6,000.00	
AUTO PARTS & AGRICULTURE	4/89
Location: KOKOMO	
Invest Nature: GREENFIELD & JT VENTURE	
Sector: TRANSPORT SYS,EQUIP,COMP,SERV.	
Cooperants: PROV. GOVT	
Estimated Budget: \$6,500.00	
AUTO PARTS	4/89
Location: MUNCIE	
Invest Nature: GREENFIELD & JT VENTURE	
Sector: TRANSPORT SYS,EQUIP,COMP,SERV.	
Cooperants: PROV. GOVT.	
Estimated Budget: \$6,500.00	

Total estimated budget for all proposals: \$106,500.00

Post : DETROIT

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Post/Contact</u>
89/04/23	ANNUAL NORTH AMERICAN CERAMICS INC. MEETING INDIANAPOLIS FAIR, SOLO	INDUSTRIAL MACHIN, PLANTS, SERV J. POWER

RPTBI

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: LOS ANGELES

Country: UNITED STATES OF AMERICA

LOS ANGELES AND SOUTHERN CALIFORNIA CONTINUE TO GROW AT A RATE NOT FOUND ANYWHERE ELSE IN THE U.S. REAL GROSS STATE PRODUCT IS EXPECTED TO GROW BY 5.1% IN 1988, NON-FARM EMPLOYMENT BY 4.1% AND NOMINAL PERSONAL INCOME BY 9.2%. THE STATE HAS ACHIEVED ITS LOWEST ANNUAL EMPLOYMENT RATE IN 19 YEARS AT 5.4%. PER CAPITA INCOME REMAINS WELL ABOVE THE NATIONAL AVERAGE ENSURING THE REGION'S PROMINENCE AS A MARKET AND SOURCE OF TOURISTS. IN TERMS OF GROWTH, THE LEADING SECTORS IN 1988 INCLUDE CONSTRUCTION, WHOLESALE AND RETAIL TRADE, MINING AND SERVICES. MANUFACTURING IS EXPECTED TO HOLD ITS OWN, WITH ONLY AGRICULTURE DECREASING MODESTLY. THE DROUGHT THAT WAS SO SEVERE ELSEWHERE HAD ONLY MINOR IMPACT IN CALIFORNIA DUE TO THE HIGH DEGREE OF IRRIGATION IN THE STATE.

AS A SOURCE OF BOTH INVESTMENT AND TECHNOLOGY, LOS ANGELES/SOUTHERN CALIFORNIA AREA IS RAPIDLY BECOMING THE LARGEST CENTER FOR FINANCIAL SERVICES WEST OF NEW YORK, WITH JAPANESE AND OTHER ASIAN BANKS PLAYING A MAJOR ROLE. AS WELL, IT IS BENEFITING SIGNIFICANTLY AS AMERICA'S GATEWAY TO THE PACIFIC RIM AND THE ECONOMIC BENEFITS THAT THIS ENTAILS. THE AREA JUST NORTH OF THE CITY OF SAN DIEGO IS ALSO EXPERIENCING MAJOR GROWTH IN THE AREA OF HIGH TECHNOLOGY, AND NOW RIVALS SILICON VALLEY IN TERMS OF NEW START-UPS AND ENGINEERING TALENT. CANADA AND CALIFORNIA TRADE CONTINUES TO INCREASE, ALTHOUGH BOTH COUNTRIES' STATISTICS ERR SADLY ON THE LOW SIDE. CANADIAN EXPORTS TO CALIFORNIA INCREASED 3.5% TO 4.2% B (CDN) IN 1987, WHILE CALIFORNIAN EXPORTS TO CANADA INCREASED 5.4% TO \$4.7 B (CDN). THE TOP SIX CANADIAN EXPORTS TO CALIFORNIA IN 1987 WERE NATURAL GAS (NOT SHOWN IN THE STATISTICS AS EXPORTS TO CALIFORNIA) \$1 B, NEWSPRINT (\$490M), AIRCRAFT PARTS (\$499M) TELECOM EQUIPMENT (\$170 M), ELECTRICITY (\$105 M VERSUS ZERO IN 1985) AND OFFICE MACHINES (\$101 M). - (NOTE THAT AUTOS AND PARTS ARE ALSO NOT SHOWN IN THE STATISTICS BUT PROBABLY EXCEED \$300 M). THE TOP FIVE CALIFORNIA EXPORTS TO CANADA IN 1987 WERE ELECTRONIC COMPUTERS (\$1.1 B), AIRCRAFT PARTS (\$265 M), FRESH VEGETABLES (\$258 M), ELECTRONIC COMPONENTS (\$221 M) AND FRESH FRUITS AND BERRIES (\$167 M).

OUTLOOK - 1989/90: /CALIFORNIA'S GROWTH RATE HAS CONSISTENTLY EXCEEDED THE NATIONAL AVERAGE DURING THE CURRENT EXPANSION, BUT EVEN ITS VERY DIVERSE ECONOMY CANNOT ESCAPE THE MILD RECESSION EXPECTED IN 1989/90. THE STATE'S ECONOMY PRODUCES 13% OF THE NATION'S TOTAL OUTPUT, WITH NEARLY EVERY SECTOR REPRESENTED.

THE SECTOR EXPECTED TO SUFFER THE MOST IS DEFENCE SPENDING ON RESEARCH, DEVELOPMENT AND PRODUCTION. FIRMS IN CALIFORNIA HAVE RECEIVED AN AVERAGE OF 20% OF NATIONAL DEFENCE CONTRACT DOLLARS FOR THE PAST SEVERAL YEARS. WITH THE DEFENCE BUILD-UP HAVING RUN ITS COURSE, DEFENCE SPENDING IN REAL DOLLARS IS FORECAST TO BE FLAT OR DOWN SLIGHTLY DURING THE NEXT 4 OR 5 YEARS. EMPLOYMENT HAS ALREADY BEGUN TO LEVEL OFF IN THE AIRCRAFT, MISSILES AND COMMUNICATIONS EQUIPMENT SECTORS, DESPITE STRONGER ORDERS FOR CIVILIAN AIRCRAFT.

WE EXPECT CONTINUED DEMAND FOR THE MAJOR CANADIAN EXPORTS. WITH MORE STAFF AT THE CONSULATE PROMOTING CANADIAN EXPORTS COMBINED WITH INCREASED FREE

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: LOS ANGELES

Country: UNITED STATES OF AMERICA

TRADE FUNDS, THE PROSPECTS FOR GROWTH ON AN ANNUAL BASIS ARE EXCELLENT.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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. DEFENCE PROGRAMS, PRODUCTS, SERV
CONTINUED U.S. DEFENCE PROGRAMS OFFER OPPORTUNITIES I.E. MD-11 (DC-10 REPLACEMENT), C-17 CARGO PLANE AND MD-80 COMMERCIAL AIRCRAFT.
2. AGRI & FOOD PRODUCTS & SERVICE
CANADIAN SEAFOOD AND OTHER FOOD PRODUCTS ARE WELL ACCEPTED AND RANK AS TOP QUALITY.
3. TRANSPORT SYS, EQUIP, COMP, SERV.
NEW MASS TRANSIT SYSTEMS BEING PROPOSED FOR GREATER L.A. TO REDUCE POLLUTION AND CONGESTION.
4. ADVANCED TECH. PROD. & SERV
S. CALIFORNIA IS LEADING COMPUTER REVOLUTION, AND WITH LARGER, AFFLUENT POPULATION, MARKET SIZE IS HUGE.
5. CONSUMER PRODUCTS & SERVICES
HIGH DEMAND FOR INNOVATIVE DESIGNS AND GOOD FABRICS.
6. FOREST PRODUCTS, EQUIP, SERVICES
DEVELOPMENT FOR COMMERCIAL/RESIDENTIAL PROPERTIES. CONTINUES UNABATED, WITH HIGH DEMAND FOR BASIC WOOD AND OTHER PRODUCTS.

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

1. DEFENCE PROGRAMS, PRODUCTS, SERV
2. FISHERIES, SEA PRODUCTS & SERV.
3. FOREST PRODUCTS, EQUIP, SERVICES
4. POWER & ENERGY EQUIP. & SERV.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	20303.00 \$M	20611.00 \$M	20802.00 \$M	21103.00 \$M
Canadian Exports	211.00 \$M	225.00 \$M	231.00 \$M	237.00 \$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	90.00 %
EUROPE	4.00 %
ASIA OR FAR EAST	1.00 %
AUSTRALIA	1.00 %
SOUTH AMERICA	1.00 %
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:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION

Mission: LOS ANGELES

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

Activity: PHEONIX GROCERS ASSOCIATION
Expected Results: ESTABLISH BROKER REPRESENTATIVE

Activity: NATURAL FOOD EXPO 89/90/91
Expected Results: ESTABLISH BROKER REPRESENTATIVE

Activity: WESTERN RESTAURANT ASSOC. 79/80
Expected Results: ESTABLISH BROKER REPRESENTATIVE

Activity: CALIF GROCERS ASSOC. 79/80
Expected Results: ESTABLISH BROKER REPRESENTATIVE

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

Activity: SOLO FOOD SHOW LOS ANGELES
Expected Results: DEVELOP BROKER REPRESENTATIVE IN THE EVENT.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	1152.00 \$M	1198.00 \$M	1246.00 \$M	1277.00 \$M
Canadian Exports	30.00 \$M	34.00 \$M	38.00 \$M	47.00 \$M
Canadian Share of Market	0.26 %	0.28 %	0.35 %	0.39 %

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

Major Competing Countries	Market Share
AUSTRALIA	17.00 %
SOUTH AMERICA	30.00 %
NORWAY	29.00 %
OTHER COUNTRIES	21.00 %

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
- Competitive pricing

Factors for Canadian exports not reaching market potential:

- 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 1989, 90, 91

Expected Results: TO EXPAND BROKER REPRESENTATION FOR CANADIAN PRODUCERS

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	1000.00 \$M	1000.00 \$M	1000.00 \$M	1000.00 \$M
Canadian Exports	25.00 \$M	20.00 \$M	27.50 \$M	27.50 \$M
Canadian Share of Market	2.00 %	2.00 %	3.00 %	3.00 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	85.00 %
GERMANY WEST	4.00 %
UNITED KINGDOM	4.00 %
JAPAN	3.00 %
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. ELECTRO-OPTICS
2. DISPLAY SYSTEMS
3. CABINETRY
4. COMPONENTS
5. PCB
6. SUB-SYSTEMS
7. NDT 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
- Bilateral economic trade agreement
- Willingness of exporters to invest/joint venture in territory
- (A) AGENCY REPRESENTATION
- IN TERRITORY (B) INDUSTRIAL
- AL BENEFITS POLICY.

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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
- Market prospects have not been adequately explored
- (A)LACK OF AGENCY REPRESENTATION.
- (B)LACK OF FOLLOW-UP ACTIVITY

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

Activity: CONTINUATION OF LOCAL CO. INDUSTRY VISIT PGM.
Expected Results: ADVISE INDUSTRY OF CANADIAN CAPABILITY & PROGRAMS.

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

Activity: AFCEA '89
Expected Results: INTRODUCE NEW COMPANIES TO MARKET

Activity: ASSOCIATION OF OLD CROWS
Expected Results: EXPAND CONTRACTS IN ECM

Activity: MILCOM '89
Expected Results: INCREASE SALES

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

Activity: SUB-CONTRACTOR CONFERENCE
Expected Results: INTRO MAJOR PRIME CONTRACTORS.

Activity: INCREASE LOCAL REPRESENTATION

Activity: MAIL-OUT OF INDUSTRY VENDOR ACTIVITIES.
Expected Results: INTRO MAJOR PRIME CONTRACTORS.

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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 still in the planning stage which provide opportunities for Canadian suppliers:

CDN AUTOMATED AIR TRAFFIC
SYSTEM (CAATS)

Approximate Value: 500 M\$
Financing Source : OTHER
Contact : HUGHES(GROUND SYSTEMS GROUP)
HAS BID AS PRIME

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	50.00 \$M	50.00 \$M	50.00 \$M	45.00 \$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 %	2.00 %

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

Major Competing Countries Market Share

UNITED STATES OF AMERICA	98.00 %
UNITED KINGDOM	2.00 %
GERMANY WEST	2.00 %
JAPAN	2.00 %
FRANCE	2.00 %
CANADA	1.20 %

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

Products/services for which there are good market prospects:

1. SPACE RESEARCH
2. REMOTELY OPERATED VEH'S (ROV)
3. ANTI-SUBMARINE WARFARE
4. MINE COUNTER MEASURES
5. USAF SPACE DIV. (NOTE: PROJ AGREE. FOR DDSP UNWAY
6. WITH NAVAL OCEAN SYSTEMS CENTER, SAN DIEGO

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Fairs and Missions support
- Competitive pricing
- THRU U.S. - CDA
- DPSA AND DDSP PROGRAM

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

Factors for Canadian exports not reaching market potential:

- Market prospects have not been adequately explored
- A # OF "BLACK PGMS"
- RESTR. TO US FIRMS
- R&D CONTRACTS ARE GENERALLY DIRECTE
- TO DOMESTIC SOURCES. LACK OF AWARE

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

Activity: DDSP PROJECT WITH USAF SPACE DIVISION "FOCUS"
Expected Results: \$14M DEVELOPMENT CONTRACT AS CANADIAN SHARE. DOWNSTREAM PRODUCTIONS ESTIMATE \$200M PLUS.

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

Activity: COMMAND BRIEFING TO NOSC/INDUSTRY VISITS
Expected Results: AWARENESS OF DDPS OPPORT. BY U.S. DEFENCE AGENCIES LEADING TO SHARED DEV. PROJ. & SUBSEQUENT PRODUCTION CONTRACTS.

Activity: BRIEFING ON DDSP TO NAVAL WEAPONS CTR., CHINA LAKE

Activity: BRIEFING ON DDSP TO BALLISTIC MISSILE OFFICE(NORTON AFB)

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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 still in the planning stage which provide opportunities for Canadian suppliers:

SPACE-BASED RADAR	Approximate Value:	0 M\$
	Financing Source :	
	Contact	: CLO/EL SEGUNDO
ADI (AIR DEFENCE INITIATIVE)	Approximate Value:	0 M\$
	Financing Source :	
	Contact	: TDP
SDI (STRATEGIC DEFENCE INITIATIVE)	Approximate Value:	0 M\$
	Financing Source :	
	Contact	: TDP
SPACE STATION	Approximate Value:	0 M\$
	Financing Source :	
	Contact	: CLO/EL SEGUNDO

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	49000.00 \$M	50000.00 \$M	48000.00 \$M	52000.00 \$M
Canadian Exports	500.00 \$M	400.00 \$M	360.00 \$M	400.00 \$M
Canadian Share of Market	1.00 %	0.08 %	0.08 %	0.08 %

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. PRECISION MACHINING
4. SIMULATORS
5. AIRCRAFT SUB-ASSEMBLIES
6. TOOLING FOR SUB-ASSEMBLIES
7. AVIONICS SYSTEMS
8. G.S.E.
9. ASSEMBLY DESIGN FOR 1 & 5
10. ENGINEERING DESIGN FOR 2 & 6
11. AVIONICS COMPONENTS
12. FASTENERS

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: LOS ANGELES

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
- Provincial export promotion
- Competitive pricing
- Strong sectoral capability in Canada
- INDUSTRIAL BENEFIT
- APPLICATIONS

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- (1)PROBABLY LACK OF CDN PLANT CAP.
- &/OR WORKFORCE(2)NO CONSISTEN MKT.

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

Activity: DIRECT MAIL PROGRAM TO MAJOR U.S. FIRMS
Expected Results: INCREASED AWARENESS OF SUPPLIERS

Activity: UPDATE OVERVIEW REP OF US CONTACTS & MAIL TO CDN EXPORTERS
Expected Results: INCREASE CANADIAN AWARENESS

Activity: IMPROVE P.C. USE & USEFULLNESS
Expected Results: MDRE INTELLIGENT USE OF EXISTING RESOURCES

Activity: REFINE CONTACT LIST & SOFTWARE
Expected Results: ENHANCE UTILITY & ACCURACY

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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: ATTEND AIAA SPRING EXHIBIT IN 1989
Expected Results: OPPORTUNITIES FOR CDN PARTICIPANTS

Activity: ATTEND AFCEA SPRING EXHIBIT IN 1989
Expected Results: OPPORTUNITIES FOR CDN PARTICIPANTS

Activity: AIRSHOW CANADA '89 (ABBOTTSFORD)
Expected Results: IMPROVED SUPPORT BY SECTOR 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: SECTOR/SUB-SECTOR MARKET STUDY
Expected Results: CLEARER GUIDELINES FOR CANADIAN EXPORTERS

Activity: UPDATE OVERVIEW OF CDN COMPANY ACTIVITIES
Expected Results: INCREASED POST & PRIME AWARENESS OF CDN ACTIVITIES

Activity: INCREASE LIAISON WITH LOCAL CHAMBERS
Expected Results: IMPROVE STATISTICS BANK

Activity: ENCOURAGE CANADIANS TO USE MORE LOCAL REPS
Expected Results: IMPROVE CAPTURE RATIO

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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 still in the planning stage which provide opportunities for Canadian suppliers:

ADVANCE TACTICAL FIGHTER/
AIRCRAFT

Approximate Value: 50000 M\$
Financing Source : OTHER
Contact : (213) 335-4439 CANADIAN
LIAISON OFFICE

U.S.A.F. C-17 TRANSPORTER

Approximate Value: 45000 M\$
Financing Source : OTHER
Contact : (213) 335-4439 CANADIAN
LIAISON OFFICE

MD SERIES COMMERCIAL A/C

Approximate Value: 55000 M\$
Financing Source : OTHER
Contact : (213) 335-4439 CANADIAN
LIAISON OFFICE

NASA PROJECTS - SPACE

Approximate Value: 3000 M\$
Financing Source : OTHER
Contact : (213) 335-4439 CANADIAN
LIAISON OFFICE

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	4000.00 \$M	4500.00 \$M	5000.00 \$M	5300.00 \$M
Canadian Exports	12.00 \$M	20.00 \$M	25.00 \$M	30.00 \$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	55.00 %
JAPAN	20.00 %
KOREA	10.00 %
HONG KONG	10.00 %
WEST 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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	900.00 \$M	1000.00 \$M	1.20 \$M	1.40 \$M
Canadian Exports	55.00 \$M	60.00 \$M	70.00 \$M	76.00 \$M
Canadian Share of Market	0.06 %	0.06 %	0.06 %	0.05 %

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

Major Competing Countries

Market Share

JAPAN	29.00 %
KOREA	20.00 %
TAIWAN	19.00 %
GERMANY WEST	17.00 %
UNITED STATES OF AMERICA	15.00 %

Current Status of Canadian

exports in this sector/subsector: Well established and growing

Products/services for which there are good market prospects:

1. HARD PARTS
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
- 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: 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

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

Activity: SEMA/AI

Activity: ASCCA AUTOMOTIVE SERVICE TRADE SHDW

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	100.00 \$M	300.00 \$M	350.00 \$M	400.00 \$M
Canadian Exports	5.00 \$M	11.00 \$M	20.00 \$M	30.00 \$M
Canadian Share of Market	0.05 %	0.03 %	0.06 %	0.07 %

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

Major Competing Countries	Market Share
JAPAN	60.00 %
ITALY	25.00 %
GERMANY WEST	6.00 %
UNITED STATES OF AMERICA	5.00 %
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. LIGHT RAIL VEHICLES
2. CONTROL SYSTEMS
3. SEATING, INTERIORS
4. TRAINING SYSTEMS
5. CONSULTING SERVICES

Factors contributing to current successful Canadian exports:

- Import duties are moderate
- Aggressive marketing
- Fairs and Missions support
- Trade Fair activity
- Canada is one of few sources of supply
- Strong sectoral capability in Canada
- Competitive Canadian financing
- Willingness of exporters to invest/joint venture in territory

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: 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
- Unsuitable product
- Market prospects have not been adequately explored
- BUY AMERICA ACT

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

Activity: INTER-CAN '89

Activity: INCOMING TRANSIT MISSION FROM PHOENIX - TUCSON AREA CITIES

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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 still in the planning stage which provide opportunities for Canadian suppliers:

LACTC CENTURY FREEWAY LIGHT RAIL SYSTEM & PROPOSED EXTENS.
Approximate Value: 800 M\$
Financing Source : EOC - Export Dev Corporation
Contact : LACTC LOS ANGELES, CA

REGIONAL PUBLIC TRANSIT AUTH. PHOENIX, ARIZONA
Approximate Value: 700 M\$
Financing Source : EOC - Export Dev Corporation
Contact : RPTA, PHOENIX, ARIZONA

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LOS ANGELES

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	2.80 \$M	3.10 \$M	3.00 \$M	2.90 \$M
Canadian Exports	2.70 \$M	2.90 \$M	2.90 \$M	2.70 \$M
Canadian Share of Market	95.00 %	95.00 %	95.00 %	93.00 %

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

Major Competing Countries	Market Share
PEOPLE'S REP OF CHINA	1.00 %
CHILE	1.00 %
UNION OF SOVIET SOC REP	1.00 %
HONDURAS	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. SHINGLES/SHAKES
2. TREATED WOOD PRODUCTS
3. HARDWOOD LUMBER (FLOORING)
4. MILLWORK (MOULDINGS)
5. DIMENSIONED LUMBER (SPF)
6. FINE PAPERS
7. COATED PAPER (CUPS)
8. CONVERTED PAPER PRODUCTS (FILTERS)

Factors contributing to current successful Canadian exports:

- Import duties are moderate
- Aggressive marketing
- PEMD support
- Trade Fair activity
- Provincial export promotion
- Strong sectoral capability in Canada
- Bilateral economic trade agreement

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RPTCL

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
- Limited appreciation/understanding of distribution system
- Market prospects have not been adequately explored
- LUMBER EXP. SUBJECT
- TO 15% CDN EXPORT TX

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

- Activity: IDENTIFY PROSPECTIVE BUSINESS
- Activity: CDNTACTS IN TERRITORY (SAN DIEGO, ARIZONA)
- Activity: ASSIST WITH IMPLEMENTATION OF FEDERAL MKT PROG. FOR SHAKES

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

- Activity: UPDATE 1981 STUDY ON OPPORT. IN TERRITORY FOR VALUE
- Activity: ADDED WOOD PRODUCTS
- Activity: SOUTHERN CALIFORNIA HOME & GARDEN SHOW (AUGUST)
- Activity: SOUTHERN CALIFORNIA BLDG IND. ASSOC. TRADE SHOW (NOV.)

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	75.00 \$M	48.00 \$M	50.00 \$M	47.00 \$M
Canadian Exports	12.00 \$M	6.00 \$M	7.00 \$M	6.00 \$M
Canadian Share of Market	0.16 %	0.12 %	0.14 %	0.12 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	75.00 %
KOREA	10.00 %
UNITED KINGDOM	8.00 %
GERMANY WEST	8.00 %
JAPAN	7.00 %

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

Products/services for which there are good market prospects:

1. INSTRUMENTATION
2. DRILLING & BORING EQUIPMENT
3. DRILL BITS
4. CHEMICALS
5. SOFTWARE (DATA COLLECTION)
6. 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
- 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: 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 will carry out the following approved fairs and missions:

Activity: SPE SOCIETY OF PETROLEUM ENG. REG. MEETING & TRADE SHOW

Activity: INTER-CAN '89

Activity: WORLD ENERGY CONFERENCE

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LOS ANGELES

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	182.86 \$M	192.00 \$M	201.60 \$M	211.68 \$M
Canadian Exports	19.01 \$M	19.97 \$M	20.96 \$M	22.01 \$M
Canadian Share of Market	10.40 %	10.40 %	10.40 %	10.40 %

Cumulative 3 year export potential for
CDN products in this sector/subsector: 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: Well established and growing

Products/services for which there are good market prospects:

1. BOOK PUBLISHING
2. COMMERCIAL PRINTING
3. MISCELLANEOUS PRINTING

Factors contributing to current successful Canadian exports:

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

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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
- Unsuitable product
- 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: IDENTIFICATION OF LOCAL AGENTS AND DISTRIBUTORS
Expected Results: GENERATE QUALIFIED DATA BASE OF INTERESTED U.S. COMPANIES

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	44520.00 \$M	46197.00 \$M	47102.00 \$M	48984.00 \$M
Canadian Exports	207.80 \$M	210.30 \$M	215.00 \$M	223.60 \$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	30.00 %
ASIA OR FAR EAST	50.00 %
EUROPE	15.00 %
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. ALL FURNITURE
2. ALL APPAREL

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- 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: IDEX 89/90/91
Expected Results: 25 INCOMING BUYERS

Activity: MONTREAL FURNITURE SHOW 89/90/91
Expected Results: 10 INCOMING BUYERS

Activity: TORONTO FURNITURE SHOW 89/90/91
Expected Results: 10 INCOMING BUYERS

Activity: FESTIVAL OF CANADIAN FASHION
Expected Results: 10 INCOMING 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: MAGIC (MENS APPAREL) 89/90/91
Expected Results: CANADIAN EXHIBITORS

Activity: SOLO WOMEN'S APPAREL SHDW'89
Expected Results: CANADIAN EXHIBITORS

Activity: REP SEARCH RESIDENTIAL FURNITURE
Expected Results: IDENTIFY 10-15 REPRESENTATIVES WHO HAVE AN INTEREST IN CANADIAN LINES.

Activity: REP SEARCH MENS AND BOYS APPAREL
Expected Results: IDENTIFY 10-15 REPRESENTATIVES WHO HAVE AN INTEREST IN CANADIAN LINES.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

Sector : CONSTRUCTION INDUSTRY

Sub-Sector: ARCHITECT, CONS, CONSUL, SERV

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	20.40 \$M	20.20 \$M	20.00 \$M	20.20 \$M
Canadian Exports	100.00 \$M	120.00 \$M	160.00 \$M	180.00 \$M
Canadian Share of Market	12.00 %	15.00 %	20.00 %	18.00 %

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

Major Competing Countries

Market Share

JAPAN	20.00 %
TAIWAN	20.00 %
KOREA	20.00 %

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

Products/services for which there are good market prospects:

1. PREFAB BUILDINGS
2. BUILDING STONE/TILES
3. HARDWARE ITEMS
4. PLUMBING/HEATING
5. LIGHTING FIXTURES
6. PRE-CUT HOMES
7. KITCHEN/BATH CABINETS
8. ARCHITECTURAL SERVICES

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Import duties are moderate
- Aggressive marketing
- PEMD support
- Provincial export promotion
- 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: 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

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

Activity: COMPLETE REVIEW OF MKT POTENTIAL FOR GRANITE & MARBLE PROD.

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

Activity: DETERMINE SCOPE (THRU STUDY) FOR INCR. SALES OF HRWRE PROD.

Activity: SOUTHERN CALIFORNIA HOME & GARDEN SHOW (AUGUST).

Activity: SOUTHERN CALIFORNIA BLDG. INDUSTRY ASSOC. TRADE SHOW (NOV.)

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	2.00 \$M	2.30 \$M	2.50 \$M	2.80 \$M
Canadian Exports	110.00 \$M	108.00 \$M	125.00 \$M	145.00 \$M
Canadian Share of Market	5.50 %	4.70 %	5.00 %	5.20 %

Major Competing Countries

Market Share

JAPAN	54.00 %
TAIWAN	12.00 %
UNITED STATES OF AMERICA	11.00 %
KOREA	6.00 %
ITALY	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. ROBOTICS
4. 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

Factors for Canadian exports not reaching market potential:

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

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RPTC1

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: APCA (AIR POLL, HAZARDOUS WASTE CONTROL) FAIR, ANAH. JUNE'89
Expected Results: EXPOSURE FOR CANADIAN MANUFACTURERS

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

MWD WATER SUPPLY, TREATMENT

Approximate Value: 2000 M\$

Financing Source : DOM - Domestically funded

Contact : M. PASCAL (213) 687-7432

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	4.10 \$M	4.00 \$M	4.10 \$M	4.20 \$M
Canadian Exports	48.00 \$M	46.00 \$M	42.00 \$M	44.00 \$M
Canadian Share of Market	1.20 %	1.20 %	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	94.00 %
JAPAN	3.00 %
ITALY	1.00 %
TAIWAN	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 TOOLS
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

Factors for Canadian exports not reaching market potential:

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

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RPTC1

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: UPDATE LIST OF MAJOR DIST., DEFINE CURR.INT.IN CDN PRODUCTS
Expected Results: INCREASE SHARE OF MARKET.

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: LOS ANGELES

Market: UNITED STATES OF AMERICA

Sector : INDUSTRIAL MACHIN, PLANTS, SERV.

Sub-Sector: OTHER EQUIP, MACH NOT ELS SPE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	2.00 \$M	2.10 \$M	2.20 \$M	2.40 \$M
Canadian Exports	110.00 \$M	100.00 \$M	120.00 \$M	140.00 \$M
Canadian Share of Market	0.06 %	0.05 %	0.05 %	0.06 %

Major Competing Countries

Market Share

JAPAN	60.00 %
TAIWAN	14.00 %
ITALY	10.00 %
GERMANY WEST	9.00 %
UNITED STATES OF AMERICA	7.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. PACKAGING MACHINERY
2. FOOD PROCESS MACHINES
3. ENVIRONMENTAL EQUIPMENT
4. ROBOTICS

Factors contributing to current successful Canadian exports:

- Import duties are moderate
- Aggressive marketing
- PEMO support
- Fairs and Missions support
- Trade Fair activity
- Provincial export promotion
- CIOA programs
- Competitive pricing
- Willingness of exporters to invest/joint venture in territory

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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:

- 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
- Limited Canadian capabilities
- Market prospects have not been adequately explored

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

Activity: WESTPACK '89

RPT01

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: LOS ANGELES

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
Current year	0.00	3.00	80.00
One year ago	0.00	3.00	80.00
Two years ago	0.00	3.00	80.00

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

\$ 100 MILLION - NOT INCLUDING PORTFOLIO, REAL ESTATE.

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

- OTHER U.S. REGIONS
- PACIFIC RIM
- LATIN AMERICA (& MAQUILADORA)
- WESTERN EUROPE - ESP. NETHERLANDS, BRITAIN & IRELAND
- ISRAEL

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

- SEMINARS
- MISSIONS
- MASSIVE ADVERTISING
- INVESTMENT PROMOTION OFFICES

RPTDI

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: LOS ANGELES

Country: UNITED STATES OF AMERICA

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

- CHEAP POWER
- EXCELLENT LABOR FORCE
- GOVERNMENT INCENTIVES
- GOOD MARKET
- GOOD MARKET

the following constraints:

- HIGH WAGES AND LABOR COSTS
- IMMIGRATION RESTRICTIONS
- HIGHER TAXES OR LESS GENEROUS INCENTIVES
- DIFFICULTY IN FINDING GOOD JOINT VENTURE PARTNERS

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

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

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

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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: LOS ANGELES

Country: UNITED STATES OF AMERICA
Date

Type: MISSION IN, TO INDUSTRY

ADVANCE MATERIAL MISSION. 0/00
Location: ONT/QUEBEC/B.C.
Invest Nature: JOINT VENTURE
STRATEGIC PARTN
TECHN LICENSING
Sector: INDUSTRIAL MACHIN, PLANTS, SERV.
Cooperants:
Estimated Budget: \$6,500.00

Type: OUTCALL PROGRAM

PROSPECTING AT TRADE SHOWS IN TERRITORY. 0/00
Location: TRADE SHOWS
Invest Nature: ALL
Sector: MULTIPLE SECTORS
Cooperants:
Estimated Budget: \$1,000.00

CORPORATE LIAISON 0/00
Location: LOS ANGELES
Invest Nature: JOINT VENTURE
TECHN LICENSING
ACQUISITION
Sector: ADVANCED TECH. PROD. & SERV
Cooperants:
Estimated Budget: \$5,000.00

CORPORATE LIAISON 0/00
Location: LOS ANGELES
Invest Nature: JOINT VENTURE
TECHN LICENSING
ACQUISITION
Sector: DEFENCE PROGRAMS, PRODUCTS, SERV
Cooperants:
Estimated Budget: \$5,000.00

Total estimated budget for all proposals: \$39,500.00

Post : LOS ANGELES

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Post/Contact</u>
89/08/00	AIRSHOW CANADA - ABBOTSFORD MISSION IN, TO FAIR	DEFENCE PROGRAMS, PRODUCTS, SERV
89/09/00	AMERICAN WATER WORKS ASSOC., CONF., LOS ANGELES, CALIFORNIA FAIR, NATIONAL STAND	INDUSTRIAL MACHIN, PLANTS, SERV J. POWER
89/10/13	PHCP (PLUMBING, HEATING, COOLING, PIPING SHOW), LAS VEGAS, NEVADA FAIR, NATIONAL STAND	CONSTRUCTION INDUSTRY
89/11/13	COMDEX FALL - COMPUTER SHOW LAS VEGAS FAIR, NATIONAL STAND	ADVANCED TECH. PROD. & SERV K. MUNRO
89/11/29	SEMA/SPECIALTY EQUIP. MAN. ASSOC. LAS VEGAS FAIR, NATIONAL STAND	TRANSPORT SYS, EQUIP, COMP, SERV. K. J. TYRRELL
90/03/00	SKI INDUSTRIES AMERICA/SIA SPORTS EXPO-LAS VEGAS FAIR, NATIONAL STAND	CONSUMER PRODUCTS

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: MINNEAPOLIS

Country: UNITED STATES OF AMERICA

CANADIAN EXPORTS TO THE SIX STATES COVERED BY THE MINNEAPOLIS POST TOTALED \$5.02 BILLION (CAD) IN 1987, OR APPROXIMATELY 5% OF CANADA'S WORLDWIDE EXPORTS. THESE FIGURES REPRESENT AN INCREASE OF APPROXIMATELY 15% FROM THE PREVIOUS YEAR. REGIONAL INTERESTS ARE PARTICULARLY IMPORTANT SINCE 40% OF WESTERN CANADA'S TOTAL EXPORTS MOVE INTO THIS MARKET.

THE POST REGION'S ECONOMIC GROWTH COOLED DURING THE FIRST HALF OF 1988 FROM A 3.3% ANNUAL RATE IN THE SECOND HALF OF LAST YEAR, TO A 2.2% ANNUAL RATE IN THE FIRST HALF OF THIS YEAR--WELL BELOW THE 3.7% GROWTH RATE FOR THE NATION.

REGIONAL CONSTRUCTION ACTIVITY REMAINS STAGNANT, EXCEPT IN THE TWIN CITIES WHERE IT IS MUCH STRONGER THAN ELSEWHERE IN THE REGION. THE ENERGY AND METAL-MINING SECTORS ARE IMPROVING MODESTLY. MANUFACTURING HAS SHOWN THE MOST IMPROVEMENT, AND IS ABOVE THE NATIONAL AVERAGE. THE AGRICULTURAL RECOVERY HAS BEEN DERAILED BY THE DROUGHT, WHICH HIT THE UPPER MIDWEST HARDER THAN ELSEWHERE. THE DROUGHT HAS CAUSED EXTREME VARIABILITY IN ECONOMIC CONDITIONS. HOWEVER, ITS REAL IMPACT WILL ONLY BE FELT NEXT YEAR WHEN FARMERS ENCOUNTER DEPLETED FEED SUPPLIES, SMALLER DEFICIENCY PAYMENTS, INCREASED PLANTING EXPENSES AND LESS GRAIN TO SELL. AT PRESENT, LAND PRICES CONTINUE TO RISE, LOAN PROBLEMS CONTINUE TO DROP AND THE NUMBER OF FARMERS GOING OUT OF BUSINESS HAS FALLEN TO THE LOWEST LEVEL IN AT LEAST SIX YEARS. NORTH DAKOTA AND MONTANA WILL BE HARDEST HIT BY THE DROUGHT, WHILE NEBRASKA WILL ONLY BE marginally IMPACTED DUE TO TIMELY RAINS, HIGHER GRAIN PRICES AND THE WIDESPREAD USE OF IRRIGATION IN THE STATE. MINNEAPOLIS/ST. PAUL CONTINUES TO PROSPER, AND BOTH DES MOINES AND OMAHA EXPERIENCED STRONG RECOVERY LAST YEAR WHICH IS EXPECTED TO CONTINUE IN THE COMING YEAR. EMPLOYMENT IN THE TWIN CITIES CONTINUES TO RISE, WITH THE MOST RAPID GROWTH OCCURRING IN COMMUNICATIONS, BUSINESS, HEALTH SERVICES AND THE MANUFACTURE OF WOOD PRODUCTS, INDUSTRIAL MACHINERY AND SCIENTIFIC INSTRUMENTS.

THE PROMOTION OF THE U.S./CANADA TRADE AGREEMENT HAS BEEN THE TOP TRADE PRIORITY FOR THE POST OVER THE PAST YEAR. SUPPORT FOR THE AGREEMENT HAS BEEN STRONG IN MINNESOTA (ACCOUNTING FOR \$3 BILLION IN CANADIAN EXPORTS), BUT UNEVEN ELSEWHERE THROUGHOUT THE TERRITORY, PRIMARILY DUE TO AGRICULTURAL CONCERNS.

THE UPPER MIDWEST CONTINUES TO BE ONE OF THE LARGEST IMPORTERS OF CANADIAN OIL, GAS AND ELECTRICITY. THE EXPORTS OF MANITOBA HYDRO INTO THE POST TERRITORY HAVE GROWN RAPIDLY WITH SIGNIFICANT NEW CONTRACTS SIGNED AND OTHERS PENDING. GIVEN NORTH DAKOTA GOVERNOR SINNER'S CAMPAIGN AGAINST "UNFAIR" CANADIAN ELECTRICITY IMPORTS, THE QUESTION OF ELECTRICITY EXPORTS WILL CONTINUE TO BE AN IMPORTANT ISSUE FOR THE POST.

LOCATED IN THE POST'S REGION ARE 24 FORTUNE 500 FIRMS. THE TWIN CITIES AREA REMAINS THE THIRD LARGEST HIGH-TECH CENTER IN THE U.S. AND IS THE HEADQUARTERS OF SUCH WELL KNOWN FIRMS AS CONTROL DATA, HONEYWELL, 3M, METRONICS, DATA CARD CORPORATION AND HUTCHINSON TECHNOLOGY. INVESTMENT OPPORTUNITIES EXIST IN THE MEDICAL, HIGH-TECH AND AGRI-BUSINESS SECTORS.

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RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: MINNEAPOLIS

Country: UNITED STATES OF AMERICA

NEW POST INITIATIVES PLANNED FOR 89/90 INCLUDE NEBS MISSIONS IN THE FOLLOWING SECTORS: SPORTING GOODS, SOFTWARE, COMPUTER BUSINESS SUPPLIES, CONSTRUCTION PRODUCTS, AND ARCHITECTURAL SERVICES PLUS OUTGOING MISSIONS IN THE HEALTH CARE AND DEFENCE ELECTRONICS SECTORS. SOLO TRADE SHOWS ARE THE POST WILL CONTINUE TO DEVOTE SIGNIFICANT EFFORT IN ASSISTING SMALL TO MEDIUM SIZED CDN. COMPANIES PENETRATE THE U.S. MARKET FOR THE FIRST TIME.

RPTBZ

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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 CANADA. 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 HEAD-QUARTERS OF 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, RDCKWELL 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. INDUSTRIAL MACHIN, PLANTS, SERV.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	1320.00 \$M	1340.00 \$M	1370.00 \$M	1380.00 \$M
Canadian Exports	43.00 \$M	44.00 \$M	45.00 \$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: 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. MEATS
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

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
- Limited appreciation/understanding of distribution system
- Performance of local agent or representative
- LABELLING REGULATION

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MINNEAPOLIS

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: NEBS MISSION FOR FOOD PROCESSORS.
Expected Results: ENHANCED EXPORT READINESS.

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 MANUFACTURERS TO MARKET: INCREASED SALES

Activity: UPPER MIDWEST HOSPITALITY SHOW.
Expected Results: INCREASED SALES.

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

Activity: HIGH PROFILE "TASTE OF CDA" LUN/DIN FOR GROC. CHAIN EXEC/BUYER
Expected Results: INCREASED EXPOSURE AND SALES.

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	332.00 \$M	405.00 \$M	421.00 \$M	480.00 \$M
Canadian Exports	69.00 \$M	71.90 \$M	104.70 \$M	120.00 \$M
Canadian Share of Market	20.80 %	16.80 %	24.90 %	25.00 %

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 AGRIC EQUIPMENT
2. SOIL PREPARATION, SEED & FERTILIZING EQUIPMENT
3. TRACTORS
4. COMBINE REAPERS THRESHERS & PARTS
5. OTHER HAYING & HARVESTING MASH.
6. TRUCK BOXES
7. LIVESTOCK EQUIPMENT
8. TILLAGE EQUIPMENT
9. MINIMUM TILL-NO TILL EQUIPMENT

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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
- Import duties are low
- 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 CON PRODUCTS SUITABLE FOR
- LOW 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-INFO BOOTH, ST PAUL MINN.
Expected Results: INCREASED AWARENESS OF CDN CAPABILITIES IN FARM MACHINERY IN STATE OF MINN.
- Activity: MONTANA AGRI-TRADE EXPOSITION, BILLINGS, MONTANA.
Expected Results: INCREASED AWARENESS OF CDN CAPABILITIES IN FARM MACH. IN STATE OF MONTANA.
- Activity: TRIUMPH OF AGRI, INFO BOOTH - OMAHA, NEBRASKA
Expected Results: INCREASED VISIBILITY FOR CDN MANUFACTURERS IN EASTERN NEBRASKA.

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MINNEAPOLIS

Market: UNITED STATES OF AMERICA

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

Activity: HUSKER HARVEST DAYS 89, GRANS ISLAND, NEBRASKA.
Expected Results: SALES OF \$5 MILLION (CDN) OVER 3 YEAR PERIOD.

Activity: NORTHERN FARM SHOW, MINNEAPOLIS MINNESOTA.
Expected Results: ENHANCED EXPOSURE & SALES OF CDN FARM EQUIPMENT IN MINN.

Activity: MONTANA AGRI-TRADE EXPOSITION, BILLINGS, MONTANA.
Expected Results: ENHANCED EXPOSURE & SALES OF CDN FARM EQUIPMENT IN MONTANA.

Activity: TRIUMPH OF AGRI EXPOSITION, OMAHA, NEBRASKA.
Expected Results: INCREASED VISIBILITY FOR CDN MANUFACTURERS IN EASTERN NEBRASKA.

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 EQUIPMENT CONTACTS IN POST TERRITORY.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	240.00 \$M	293.00 \$M	305.00 \$M	325.00 \$M
Canadian Exports	50.00 \$M	52.10 \$M	75.70 \$M	80.00 \$M
Canadian Share of Market	20.80 %	17.80 %	24.80 %	24.60 %

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 %
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
- Import duties are low
- 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
- SIMILAR OF FARM PRACT IN
- UPPER MIDWEST PLAINS TO
- THOSE IN W. CANADA.

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- ECONOMIC DOWNTURN IN THE FARMING
- SECTOR.

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 MANUFACTURER.

Activity: NORTH DAKOTA AG EXPO - MINOT, NORTH DAKOTA - INFO BOOTH
Expected Results: ENHANCED EXPOSURE SALES OF CDN GRAIN HANDLING EQUIP. IN POST TERRITORY.

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MINNEAPOLIS

Market: UNITED STATES OF AMERICA

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

- Activity: W. CDN FARM PROGRESS SHOW-INCOMING BUYERS MISSION.
Expected Results: APPOINTMENT OF 4 AGENTS/DISTRIBUTORS WITHIN SIX MONTHS.
- Activity: HUSKER HARVEST DAYS 1989, GRAND ISLAND, NEBRASKA
Expected Results: SALES OF \$5 MILLION (CDN) OVER 3 YEARS.
- Activity: NORTHERN FARM SHOW, MINNEAPOLIS MINNESOTA.
Expected Results: ENHANCED EXPOSURE & SALES OF CDN GRAIN HANDLING EQUIPMENT.
- Activity: MONTANA AGRI-TRADE EXPOSITION BILLINGS, MONTANA.
Expected Results: ENHANCE EXPOSURE & SALES OF CDN GRAIN HANDLING EQUIPMENT IN MONTANA.

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 SEC.
Expected Results: FURTHER DEVELOP NETWORK OF GRAIN HANDLING REPS/DISTRIBUTORS IN POST TERRITORY.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MINNEAPOLIS

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	210.00 \$M	219.00 \$M	226.00 \$M	230.00 \$M
Canadian Exports	14.00 \$M	15.00 \$M	16.00 \$M	16.00 \$M
Canadian Share of Market	6.70 %	6.80 %	6.90 %	6.90 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	85.00 %
JAPAN	5.00 %
TAIWAN	2.00 %
KOREA	1.00 %
ISRAEL	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. CASTINGS
4. CAPACITORS
5. RESISTORS
6. 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

30/05/89

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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: PREPARE SURVEY OF OPPORT AT DEFENCE COMPANIES IN TERRITORY.
Expected Results: DEVELOP AWARENESS OF CON FIRMS BY CONTRACTING OPPORTUNITIES IN REGION.

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

Activity: ORGAN MISSION TO STRAT AIR COMMAND BASE, OFFUTT AFB OMAHA NEB
Expected Results: INTRODUCE SELECTED SMALL/MEDIUM CON VENDORS TO DEFENCE MARKET OPPORTUNITIES.

Activity: U.S.-CANADA SUBCONTRACTORS CONFERENCE.
Expected Results: GENERATE NEW CONTRACTS & REQUESTS FOR QUOTES. OBTAIN PARTICIPATION BY 5 U.S. FIRMS.

Activity: HI-TECH/DEFENCE CONFERENCE.
Expected Results: IDENTIFY NEW VENDORS FOR U.S. DEFENCE CONTRACTORS IN REGION.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	2088.00 \$M	2175.00 \$M	2392.00 \$M	2535.00 \$M
Canadian Exports	84.00 \$M	91.00 \$M	100.00 \$M	106.00 \$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	50.00 %
JAPAN	13.00 %
TAIWAN	4.00 %
KOREA	4.00 %
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. INTEGRATED CIRCUITS
4. CASTINGS
5. POWER SUPPLIES
6. AUTOMATED PRODUCTION 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
- Provincial export promotion
- Competitive pricing

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DEPARTMENT OF EXTERNAL AFFAIRS

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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
- Market prospects have not been adequately explored

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

Activity: ORGANIZED NEBS SOFTWARE MISSION.
Expected Results: EDUCATE NEW EXPORTERS RE: OPPORTUNITIES IN TWIN CITIES MKT.

Activity: MIDWEST ELECTRONICS EXPO
Expected Results: INTRODUCE 10 NEW CDN VENDORS TO ELECTRONIC MARKET.

Activity: DEV TRADE INFO MAIL ON REG PER BASIS USING NEWSLETTER FORMAT
Expected Results: INTRODUCE 12-15 CDN VENDORS TO LOCAL SALES REP & U.S. COMPANIES.

Activity: ORGANIZE NEBS MISSION FOR COMPUTER/BUSINESS SUPP SECTOR.
Expected Results: EDUCATE NEBS COMP VIA ATTENDANCE AT STRICTLY BUSINESS COMPUTER FAIR.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	1010.00 \$M	1042.00 \$M	1058.00 \$M	1063.00 \$M
Canadian Exports	22.00 \$M	26.00 \$M	30.00 \$M	34.00 \$M
Canadian Share of Market	2.20 %	2.50 %	2.80 %	3.20 %

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	42.00 %
HONG KONG	14.00 %
KOREA	7.00 %
TAIWAN	7.00 %
PEOPLE'S REP OF CHINA	6.00 %
ITALY	6.00 %

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:

- Strong sectoral capability in Canada
- LEVEL OF PROF W/REGARDS T
- TIMELY FOLLOW THRU AT EVE
- LEVEL. ADJ IN PRICING/DES

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
- ESPEC DIFF FOR CDN APP MFGRS TO BE
- PRICE COMPET WHEN THEY GEN PURCH

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DEPARTMENT OF EXTERNAL AFFAIRS

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MINNEAPOLIS

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: MAIL TO KEY LOCAL BUYERS ON CDN LINES IN N.Y.
Expected Results: INCREASED SALES OF CDN APPAREL.

Activity: HOST FTWEAR & LEATHER INST OF CAN PRES TO DAYTON FTWEAR BUY.
Expected Results: INCREASE CDN FOOTWEAR SALES

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

Activity: INCOMING BUYERS MISSION TO MONTREAL
Expected Results: INCREASED SALES OF CDN FASHION APPAREL.

Activity: INCOMING BUYERS MISSION TO MANSTYLE 1989
Expected Results: INCREASED SALES OF CDN MENSWEAR

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 AND PREPARE NEW EXPORTERS

Activity: SEMI-ANNUAL MAILING TO KEY CLOTHING BUYERS.
Expected Results: ELEVATE AWARENESS OF CDN FASHION

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MINNEAPOLIS

Market: UNITED STATES OF AMERICA

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: JEWELRY & GIFTWARE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	878.00 \$M	881.00 \$M	886.00 \$M	890.00 \$M
Canadian Exports	31.00 \$M	32.00 \$M	34.00 \$M	35.00 \$M
Canadian Share of Market	3.50 %	3.60 %	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	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:

- Import duties are moderate
- Aggressive marketing
- PEMD support
- Competitive pricing
- Strong sectoral capability in Canada
- CDN GIFT IS GENER OF HIGH
- QUAL & RELATES WELL TO TH
- MKT IN TERMS OF DESIGN/PR

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
- Non-competitive pricing
- Lack of promotion and advertising
- Unsuitable product
- Limited appreciation/understanding of distribution system
- Performance of local agent or representative
- MANY SMALLER GIFT & JEWEL FIRMS ARE
- POOR AT BORDER CLEARANCE PROCEDURES

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

Activity: FOLLOW-UP WITH MANUFACTURERS ON CDN GIFTWARE SOLO SHOW
Expected Results: PARTICIPANTS TO APPOINT REP IN THIS MARKET

Activity: REPORT TO ORIE/PROV TRADE CONT ON LOC GIFTWR MKT & PLANS
Expected Results: INCREASE AWARENESS OF MKT POTENTIAL FOR SUITABLE GIFTWARE FIRMS.

Activity: MAILING TO LOCAL REPS RE: GIFT TRADE SHOWS IN CANADA.
Expected Results: ATTRACT REPS LOOKING FOR NEW LINES TO CDN TRADE SHOWS

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

Activity: CDN GIFTWARE SOLO SHOWS
Expected Results: PROVIDE PARTICIPANTS WITH THE OPPORTUNITY TO MEET 150 SALES AGENTS.

Activity: ATTEND CDN GIFT AND TABLEWARE TRADE SHOW [TORONTO]
Expected Results: MEET WITH 100 CDN GIFTWARE SUPPLIERS.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MINNEAPOLIS

Market: UNITED STATES OF AMERICA

Sector : CONSUMER PRODUCTS & SERVICES

Sub-Sector: LEISURE PROD. TDOLS HARDWARE

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	599.00 \$M	604.00 \$M	611.00 \$M	619.00 \$M
Canadian Exports	43.00 \$M	44.00 \$M	46.00 \$M	47.00 \$M
Canadian Share of Market	7.20 %	7.30 %	7.50 %	7.60 %

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 %
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. METAL FASTENER
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

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MINNEAPOLIS

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 FROM CDN BUILDING PROD/HARDWARE SOLD SHOW
Expected Results: PROVIDE ADDITIONAL SOURCING ASSISTANCE FOR LOCAL TRADE

Activity: INFORMATION BOOTH AT MINN NURSERYMEN'S ASSOC TRADE SHOW
Expected Results: GENERATION OF SOURCING INQUIRIES FROM LOCAL LAWN/GARDEN TRADE.

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

Activity: INCOMING BUYERS MISSION TO CSGA SHOW
Expected Results: INCREASE SALES OF CDN 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: SPORTING GOODS NEBS MISSION
Expected Results: EDUCATE AND PREPARE NEW EXPORTERS

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	168.00 \$M	170.00 \$M	175.00 \$M	175.00 \$M
Canadian Exports	20.00 \$M	20.00 \$M	20.00 \$M	21.00 \$M
Canadian Share of Market	12.00 %	21.00 %	12.00 %	13.00 %

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	66.00 %
TAIWAN	16.00 %
ITALY	4.00 %
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. RESIDENTIAL FURNITURE
3. HEALTH CARE 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

Factors for Canadian exports not reaching market potential:

- 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

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MINNEAPOLIS

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: ON-GOING PROG OF ASS TO FURN W. WITH PERM SHOWRM & TRADE SHO
Expected Results: INCREASED REPRESENTATION OF CDN MFGRS.; OVERALL PENETRATION OF U.S. MKT.

Activity: ONT CONTRACT FURNITURE MISSION
Expected Results: INTRODUCTION OF FIRMS TO MARKET: OBTAIN REPRESENTATION.

Activity: FURNITURE BUYERS MISSION TO WESTERN CANADA.
Expected Results: INCREASED SALES.

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

Activity: MSAIA/ASID SHOW
Expected Results: INCREASED SALES FOR EXHIBITORS.

Activity: IIDEX INCOMING BUYERS MISSION.
Expected Results: INCREASED SALES.

Activity: NEBS MISSIONS AS APPROPRIATE.
Expected Results: ENHANCED EXPORT-READINESS.

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

Activity: COMPREHENSIVE SURVEY OF UPPER MIDWEST FURNITURE RETAILERS.
Expected Results: BETTER MKT INFORMATION AVAILABLE FOR MANUFACTURERS.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MINNEAPOLIS

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	180.00 \$M	200.00 \$M	200.00 \$M	210.00 \$M
Canadian Exports	15.00 \$M	18.00 \$M	19.00 \$M	20.00 \$M
Canadian Share of Market	8.30 %	9.00 %	9.60 %	9.50 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	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
- Import duties are low
- 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
- OTHER SUPP HAVE BEEN MORE EFFECT IN
- MKTG METHODS. CDN FIRMS ARE RELAT.

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, MN - INFO BOOTH
Expected Results: PROMOTE EXPOSURE & SALES OF CDN HEALTHCARE PRODUCTS TO LOCAL TRADE COMMUNITY.

Activity: CDN/U.S. TRADE OPPORT SEMINAR -MEDICAL ALLEY ASS.
Expected Results: INFORM MEMBERS OF ASS OF OPPORT IN THE MEDICAL DEVICES SECTORS IN CDN.

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

Activity: CARE PROV OF MINN - MINNEAPOLIS, MN- INFO BOOTH..
Expected Results: PROMOTE EXPOSURE & SALES OF CDN HEALTHCARE PRODUCTS TO LOCAL TRADE COMM..

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 NUM OF CORP LIAISON VISITS IN POST TERRITORY.
Expected Results: CREATE A NETWORK OF HEALTHCARE IND CONTRACTS IN THE TWIN CITIES.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: MINNEAPOLIS

Market: UNITED STATES OF AMERICA

Sector : CONSTRUCTION INDUSTRY

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	830.00 \$M	835.00 \$M	840.00 \$M	845.00 \$M
Canadian Exports	18.00 \$M	20.00 \$M	20.00 \$M	21.00 \$M
Canadian Share of Market	2.00 %	2.00 %	3.00 %	3.00 %

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. COMMERCIAL CONSTRUCTION PRODUCTS
2. RESIDENTIAL CONSTRUCTION PRODUCTS
3. ARCHITECTURAL & DESIGN SERVICES

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Fair's and Missions support
- Trade Fair activity
- Provincial export promotion
- Competitive pricing
- 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
- Performance of local agent or representative

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: MINNEAPOLIS

Market: UNITED STATES OF AMERICA

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

Activity: MSAIA/ASID SHOW
Expected Results: INCREASED SALES & PRODUCT EXPOSURE

Activity: NORTHWESTERN LUMBERMAN ASSC SHOW.
Expected Results: INCREASED SALES & PRODUCT EXPOSURE.

Activity: NEBS MISSION FOR CONSTRUCTION PRODUCTS.
Expected Results: ENHANCED EXPORT READINESS.

Activity: NEBS MISSION FOR ARCHITECTS.
Expected Results: ENHANCED EXPORT READINESS.

RPT01

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: MINNEAPOLIS

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:

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:

- U.K.
- 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 GOVERNMENTS MAINTAIN TRADE OFFICES IN DUR TERRITORY HOWEVER, INCOMING INVESTMENT/TRADE MISSIONS FROM EUROPEAN AND ASIAN COUNTRIES ARE COMMON.
- OTHER U.S. STATES ARE ALSO ACTIVE IN MINNESOTA IN PROMOTING INVESTMENT TO THEIR RESPECTIVE STATES.
- ADVERTISING AND DIRECT MAIL CAMPAIGNS ARE MOST PREVELANT MARKETING TOOL.

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: MINNEAPOLIS

Country: UNITED STATES OF AMERICA

Compared to major competitive destinations, Canada is perceived 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

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

Sector	Ranking
Agriculture/Food/Fish	2
Commercial Service	4
Computer and Communications	1
Health Care Products/Medical	3

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RPT02

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: MINNEAPOLIS

Country: UNITED STATES OF AMERICA

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

Date

Type: MISSION OUT, INDUSTRY:

TRADE AND INVESTMENT MISSION/SEMINAR LED BY MANITOBA
MINISTER OF IND. TRADE & TOURISM.

10/89

Location: MNPLS

Invest Nature: ALL

Sector: MULTIPLE SECTORS

Cooperants: MANITOBA

Estimated Budget: \$500.00

Total estimated budget for all proposals:

\$500.00

89/06/12 RP-A10 PEMD - Government Initiated Activities 1989

295A)

Post : MINNEAPOLIS

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

89/05/16 SOLO FOOD SHOW MINNEAPOLIS AGRI & FOOD PRODUCTS & SERVICE
FAIR, SOLO

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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 CONTINUE TO MODERATE IN 1989, AS IT HAS SO FAR IN 1988. THE TWO MOST SIGNIFICANT FACTORS CONTRIBUTING TO THIS SLOWER GROWTH ARE: FIRST, RETRENCHMENT IN THE FINANCE, INSURANCE AND REAL ESTATE BUSINESS; AND SECOND, CONSTRAINTS IN THE LABOUR MARKET RESULTING FROM A VERY LOW RATE OF UNEMPLOYMENT. HIGH COSTS OF HOUSING AND A CONGESTED TRANSPORTATION SYSTEM WILL ALSO RESTRAIN GROWTH IN THE REGION. IN THEIR FORECAST FOR 1988, THE PORT AUTHORITY FOR NEW YORK-NEW JERSEY PREDICTED NEW YORK WOULD REGISTER JOB GAINS OF ONLY 10,000 OVER THE LEVEL REGISTERED IN 1987, WHILE THE LARGER 17 COUNTY NEW YORK METROPOLITAN AREA WOULD SEE JOB GAINS OF 50,000 ONLY A 0.7 GROWTH OVER 1987. A SIMILAR LOW LEVEL CAN BE FORECAST FOR 1989, PARTICULARLY IN A CLIMATE WHERE OVERALL U.S. GROWTH AND GROWTH IN OTHER MAJOR OECD COUNTRIES IS PREDICTED TO BE MORE RESTRAINED THAN IN 1988. THE LOWER U.S. DOLLAR (COMPARED TO THE YEN AND EUROPEAN CURRENCIES) MAY CONTRIBUTE TO SOME GAINS IN TOURISM AND PERHAPS SOME REVERSAL OF THE MAJOR LOSSES THE REGION EXPERIENCED IN MANUFACTURING JOBS AND OUTPUT DURING THE EARLIER PART OF THE 1980'S. NONETHELESS, THE CONSTRAINTS ON GROWTH - A TIGHT LABOUR MARKET, AN OVERTAXED INFRASTRUCTURE, AND A HIGH COST OF LIVING - WILL LIKELY LIMIT ANY SIGNIFICANT EXPANSION IN THE GREATER NEW YORK AREA WHILE CONVERSELY STIMULATING GROWTH IN THE PARTS OF OUR TERRITORY OUTSIDE A 40 MILE RADIUS OF N.Y.C.

TRADE OUTLOOK - CANADIAN MERCHANDISE EXPORTS TO THIS TERRITORY IN 1987 TOTALLED \$17.2 BILLION. OF THE THREE STATES IN OUR TERRITORY, NEW JERSEY WAS THE ONLY ONE SHOWING A DOLLAR INCREASE IN TRADING WITH CANADA. THE MOST SIGNIFICANT REDUCTION IN CANADIAN EXPORTS WAS TO NEW YORK STATE WHERE THERE WAS A SUBSTANTIAL REDUCTION IN THE IMPORTATION OF PASSENGER AUTOMOBILES AND CHASSIS AND PRECIOUS METALS FROM ONTARIO. ANOTHER FACTOR AFFECTING THE DECLINE WAS THE RISING VALUE OF THE CANADIAN DOLLAR DURING THIS PERIOD. THE OVERALL GROWTH IN CANADIAN EXPORTS IN TRADITIONAL AREAS IS LIKELY TO BE MODERATE DURING FY 89/90. THOUGH MUCH WILL DEPEND ON THE EXCHANGE RATE WHICH WILL HAVE AN IMPORTANT BEARING ON THE COMPETITIVE PRICING OF CANADIAN EXPORTS. MORE IMPORTANTLY, THE DEGREE TO WHICH CANADIAN EXPORTERS AND U.S. PURCHASERS GRASP THE ADVANTAGES OFFERED BY THE FREE TRADE AGREEMENT (ASSUMING IT ENTERS INTO EFFECT) WILL DETERMINE WHETHER EXPORTS TO THIS TERRITORY INCREASE SIGNIFICANTLY OVER THE NEXT FEW YEARS. THE FTA WILL CREATE OPPORTUNITIES WHERE PREVIOUSLY A TARIFF BARRIER KEPT US ON THE SAME FOOTING AS OTHER FOREIGN SUPPLIERS AND SHOULD ALSO HELP TO SECURE OUR ACCESS TO SECTORS WHERE PROTECTIONIST SENTIMENT IS STRONG. OVER THE LONGER TERM THOUGH, IT WILL BE THE WILLINGNESS OF SMALL AND MEDIUM SIZED COMPANIES TO FOLLOW THE EXAMPLE OF OTHERS AND VENTURE INTO THIS DIVERSE, HIGHLY-SPECIALIZED MARKET THAT WILL SET OUR FUTURE DIRECTION. THE SECTORS OFFERING THE BEST NEW PROSPECTS FOR CANADIAN FIRMS IN THIS TERRITORY ARE DEFENCE PRODUCTS, APPAREL, FOOD AND FISH PRODUCTS, COMPUTER SOFTWARE AND FURNITURE. WE BELIEVE THERE MAY ALSO BE SIGNIFICANT UNTAPPED RESOURCE OF NEW TECHNOLOGIES IN THE PRINCETON-RUTGERS RESEARCH

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: NEW YORK, CONSULATE GENERAL

Country: UNITED STATES OF AMERICA

CORRIDOR BUT ARE UNABLE TO EXPLORE IT WITH OUR PRESENT PERSONNEL COMPLE-
MENT. IN BERMUDA CANADIAN FOOD PRODUCTS AND BUILDING MATERIALS CONTINUE
TO ENJOY MARKET ACCEPTANCE AND SHOULD RETAIN OR SLIGHTLY INCREASE THEIR
MARKET SHARE IN FY 89/90.

ABOVE, WE EXPECT CONTINUED SUCCESS IN ATTRACTING NEW INVESTMENT TO CANADA
FROM THIS TERRITORY. IN FY 87/88 SOME EIGHT-EIGHT U.S. INVESTORS
(INCLUDING ENTREPRENEURIAL IMMIGRANTS) BROUGHT IN U.S. \$408 MILLION.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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 COMMAND & MILITARY CONTR. IN OUR TERRITORY OFFER A LUCRATIVE MKT TO CAN. EXPORTERS OF DEFENCE-RELATED PROD. IN 1986 NEW YORK RANKED 3RD & NEW JERSEY 13TH IN OVERALL EXPENDITURE OF DOD PROCUREMENT BUDGETS. HOWEVER GRAMM RUDMAN TYPE POLICIES COULD CAUSE DIFFICULTIES WITH RESPECT TO OVERALL SPENDING CEILINGS.
2. CONSUMER PRODUCTS & SERVICES
THE QUALITY & DIVERSITY OF CAN. APPAREL PRODUCTS HAS ALREADY CAUGHT THE ATTENTION OF U.S. IMPORTERS & SALES ARE GROWING RAPIDLY. EXPORTS OF CAN. FURNITURE & DESIGN PRODUCTS ARE ALREADY IMPRESSIVE BUT REPRESENT ONLY 1% OF A VAST POTENTIAL MARKET.
3. ADVANCED TECH. PROD. & SERV
CANADIAN SOFTWARE DEVELOPERS HAVE DEVELOPED A REPUTATION IN THIS MKT FOR INNOVATION & QUALITY. RAPIDLY INCREASING COMPUTERIZATION OF AMERICAN LIFE IS CREATING MANY NEW MARKET NICHES WHERE CANADIANS CAN EXCEL.
4. FISHERIES, SEA PRODUCTS & SERV.
NEW YORK AREA IS A \$2 BILLION ANNUAL MARKET FOR SEAFOOD OF ALL KINDS. IT IS A UNIQUE MARKET REQUIRING DIRECT PROMOTIONAL EFFORTS AS THIS FALL'S VERY SUCCESSFUL FIRST-EVER NEW YORK SEAFOOD SHOW DEMONSTRATED.

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

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

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: NEW YORK, CONSULATE GENERAL

Market: BERMUDA

Sector : MULTIPLE SECTORS

Sub-Sector: ALL SUB-SECTORS

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	0.00 \$M	556.80 \$M	608.50 \$M	645.00 \$M
Canadian Exports	29.80 \$M	36.90 \$M	39.60 \$M	40.80 \$M
Canadian Share of Market	6.00 %	6.60 %	6.50 %	6.30 %

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 %
UNITED KINGDOM	10.00 %
CANADA	6.00 %
JAPAN	3.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. FOOD & BEVERAGE ITEMS
2. TELEPHONE APPARATUS & EQUIPMENT
3. NEWSPRINT PAPER
4. LUMBER
5. STRUCTURAL STEEL
6. STRUCTURAL ARCHITECTURAL METAL PRODUCTS
7. HARDWARE ITEMS
8. OFFICE FURNITURE
9. MEDICINAL & PHARMACEUTICAL 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
- Canada is one of few sources of supply
- Strong sectoral capability in Canada

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NEW YORK, CONSULATE GENERAL

Market: BERMUDA

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- TRANSPORTATION & DELIVERY DIFFICUL
- TIES

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

Activity: LIAISON WITH BRMDN GOVT OFFICIALS TO MONITOR CONTRACT BIDS
Expected Results: PRDVISION OF TIMELY INFO TO CDN COMP SEEKING OPPORTUNITIES IN BERMUDA

Activity: LIAISON W/BRMDN IMPRTRS TO DETERMINE NEW PROD RQRMTS SDURCES
Expected Results: INTRODUCTION OF CAPABLE CON SUPP TO BERMUDIAN CONTACTS.

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

Activity: BUILD PROD & HARDWR MISSION FOR SPRING 90-PENDING APPROVAL
Expected Results: INTRODUCTION DF 10 CDN COMP TO BERMUDIAN 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: INVITA'N TO 1-2 BRMDN BUYERS TO VISIT CDN TO SEEK NEW SOURCE
Expected Results: ESTABLISH OF NEW BUSINESS RELATIONSHIP WITH 4 CDN COMP.

Activity: APPOINTMENT OF HONORARY CONSUL-BERMUDA [SUBJ TO APP BY OTTAW
Expected Results: ONGOING LOCAL PRESENCE WHICH SHOULD ENHANCE OUR LIASON FUNCTION WITH BERMUDIAN & STRENGTHEN BERM/CDN TIES.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	3800.00 \$M	4000.00 \$M	4200.00 \$M	4400.00 \$M
Canadian Exports	1000.00 \$M	1000.00 \$M	1200.00 \$M	1400.00 \$M
Canadian Share of Market	26.00 %	25.00 %	28.00 %	30.00 %

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

Major Competing Countries

Market Share

JAPAN	6.00 %
IRELAND	5.00 %
NORWAY	5.00 %
DENMARK	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. COD
2. FLATFISH
3. LOBSTER
4. SCALLOPS
5. SALTFISH
6. CRABMEAT

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

RPTCL

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: FISHERIES RECEPTION WILL BE SCHEDULED FOR 89 & BE FUND PROV.
Expected Results: INTRODUCTION OF 8 NEW PRODUCERS TO WHOLESALERS/IMPORTERS

Activity: CALLS WILL BE SCHEDULED REGULARLY ON POTENTIAL OUTLETS IN NY
Expected Results: TO OBTAIN 3-5% MORE SALES VOLUME.

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

Activity: NEW YORK SEAFOOD SHOW - OCT 1989
Expected Results: INTRODUCTION OF 10 FIRMS TO LOCAL 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: SURVEY FOR UNDER-UTILIZED SPECIES OF FISH WILL BE UNDERTAKEN
Expected Results: RESULTS WILL DEPEND ON SPECIES AVAILABLE & REACTION OF BUYERS

Activity: SEPERATE SEAFOOD MKT SURVEY ON BEHALF OF N.S. DEPART OF FISH
Expected Results: MORE BUSINESS CONTACTS & ADDITIONAL 5% INCREASE IN SALES VOLUME FOR NOVA SCOTIA PRODUCERS

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	35000.00 \$M	38000.00 \$M	4000.00 \$M	42000.00 \$M
Canadian Exports	23.00 \$M	55.00 \$M	60.00 \$M	63.00 \$M
Canadian Share of Market	0.00 %	0.00 %	1.40 %	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	95.00 %
GERMANY WEST	1.00 %
UNITED KINGDOM	0.00 %
FRANCE	0.00 %

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

Products/services for which there are good market prospects:

1. MILLIMETER WAVE TECHNOLOGY
2. AUTOMATED FIRE CONTROL SYSTEMS
3. SECURE ADP (AUTOMATIC DATA PROCESSING SYSTEMS)
4. ARTIFICIAL INTELLIGENCE (AI)
5. SECURE LOCAL AREA NETWORKS
6. COMPUTER AIDED LOGISTIC SUPPORT
7. VHSIC (VERY HIGH SPEED INTEGRATED CIRCUITS) TECH
8. ADA (COMPUTER LANGUAGE) APPLICATIONS
9. SENSORS-RADAR & NIGHT VIEWING
10. SATELLITE SYSTEMS (SMALL MANPACKED)
11. NEW HF & VHF RADIO TECHNOLOGIES
12. COMPATIBLE BATTLEFIELD ELECTRONICS SYSTEMS

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
- Willingness of exporters to invest/joint venture in territory

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:

- Limited Canadian capabilities
- PENetration OF MILITARY MKT REQUIRES
- A SUSTAINED MKT EFFORT OVER SEVERAL

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

Activity: IDENTIFY, INTRODUCE & SUPPORT CDN COMP WITH CAPABILITY TO
Expected Results: IF PROPER MATCH IS OBTAINED BUSINESS IN RANGE OF US \$110 M
OVER 3-6 YR PERIOD WILL BE GENERATED.

Activity: CONT TO CALL ON SR. MILITARY & CIVILIAN OFFICIALS IN PARTIC
Expected Results: IMPROVED ACCESS OF CDN COMPANIES TO KEY DECISION MAKERS

Activity: WORK WITH THE CDN COMM CORP & CECOM, FORT MONMOUTH TO ENSURE
Expected Results: CDN COMP WITH APPROPRIATE TECH WILL BE WELL PLACED TO RECEIVE
BID SETS, THUS BECOMING AWARE OF NEW OPPORTUNITIES.

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

Activity: ORGANIZATION OF VISIT OF MEMBERS OF ARDEC NEW ESTABLISHED
Expected Results: IDENTIFY OF CDN COMP WITH CAPABILITIES TO WORK ON JOINTLY
FUNDED R & D PROJ PARTICULE IN AREA O FIELD ARTILLERY SYST.

Activity: CDA DAY AT FORT MONMOUTH/ONE DAY TABLE TOP SHDW/RECEPTION
Expected Results: INTRODUCE 12 CDN TO CECOM R & D & CONTRACTING COMMUNITY.

Activity: ARRANGE FOR PARTS/COMPONENTS MISSION FROM CECOM TO VISIT CDA
Expected Results: INDENTIFICATION OF CDN COMP WHICH CAN SUPPLY PARTS ON CECOM
SHORT LIST

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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: UNDER AUSPICES OF NEW ESTAB WORK GROUP AT ARDEC, PICATINNY
Expected Results: INCREASE PARTICIPATION OF CDN FIRMS IN R & D PROJ AT ARDEC
LEAD TO CONTRACT AWARDS IN RANGE OF \$5M IN NEXT 5 YEARS

Activity: WORK WITH CECOM PROCUREMENT DIRECTORATE TO IDENTIFY 20 COMP
Expected Results: BUDGET FOR SPARES IS QUITE SUBSTANTIAL & ONE CAN ANTICIPATE
BUS. IN THE RANGE OF US\$3M CLD BE GENERATED OVER 3YR PERIOD.

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

(ACCS/Common Hardware/Software Subcontracting) Approximate Value: 1000 M\$
Financing Source : DOM - Domestically funded
Contact : P.WILLIAMS, CNGNY, TELEX 62014481
TILO OFFICE, CECOM, FT MONMOUTH

Enhanced Position Locate & Repor System 2nd Sourcing for Mfg Eq Approximate Value: 25000 M\$
Financing Source : DOM - Domestically funded
Contact : AS ABOVE

SINGARS-Standard General Pur- Pose Military Radion-2nd Sourcing Approximate Value: 25000 M\$
Financing Source : DOM - Domestically funded
Contact : AS ABOVE

Advanced Field Artillery System (AFAS) Approximate Value: 270 M\$
Financing Source : DOM - Domestically funded
Contact : P.WILLIAMS, CNGNY, TELEX 6201448
3 FAX (212) 246-7424

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: NEW YORK, CONSULATE GENERAL

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	16900.00 \$M	17600.00 \$M	18480.00 \$M	20265.00 \$M
Canadian Exports	105.00 \$M	110.00 \$M	115.00 \$M	120.00 \$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 KINGDOM	0.00 %
GERMANY WEST	0.00 %
FRANCE	0.00 %

Current Status of Canadian

exports in this sector/subsector: Small but expanding

Products/services for which there are good market prospects:

1. AIRCRAFT SYSTEMS & SUBSYSTEMS
2. CASTINGS
3. MARINE SYSTEMS & SUB-SYSTEMS
4. CABINETS & CHASSIS
5. ELECTRONIC COMPONENTS
6. MACHINED PARTS

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

Factors for Canadian exports not reaching market potential:

- LACK OF AGRESSIVE SALES ACTIVITY &
- FOLLOW-UP BY CDN SUPP PLACES THEM

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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: CONT LIAISON PROG WITH LOCAL DEFENCE CONTR TO PROM BENEFITS
Expected Results: NEW BUSINESS OPPORTUNITIES WITH U.S. PRIMES

Activity: PARTICIPATE IN HIGH TECH CONF TO PROVIDE GUIDE TO NE EXPRTS
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: POST HAS PROPOSED SUBCONTR CONF III FOR TORONTO IN SPRING89
Expected Results: \$10M OR MORE IN US & FOREIGN SALES OF DEFENCE COMPON & SUB-SYSTEMS IN 1ST YR AFTER EVENT. MORE IN SUBSEQUENT&FOLLOW ON

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

Activity: IDENT. & ACTIVATE A PROG OF LIAISON VIS.;AMONG 2ND TIER DEF.
Expected Results: EXTEND MKT POTENTIAL FOR CDN DEFENCE PARTICIPANTS BEYOND TRADITIONAL PRIME CONTR LEVEL.

Activity: MONITOR AWARDS & ENCOURAGE RECIPIENTS OF MAJ NEW CONTR TO
Expected Results: INCREASE PARTICIPATION BY CDN FIRMS IN NEW PROGRAMS

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RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NEW YORK, CONSULATE GENERAL

Market: UNITED STATES OF AMERICA

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

AEGIS PROGRAM UNISYS AS 2ND
SOURCE TO RCA

Approximate Value: 26000 M\$
Financing Source : DOM - Domestically funded
Contact : CDN CONSULATE GENERAL, NYC

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	315000.00 \$M	30000.00 \$M	288000.00 \$M	28000.00 \$M
Canadian Exports	71.00 \$M	68.00 \$M	66.00 \$M	65.00 \$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	64.00 %
JAPAN	20.00 %
UNITED KINGDOM	17.00 %

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

Products/services for which there are good market prospects:

1. SOFTWR COMPATIBLE WITH IBM/PC APPLE/COMMODORE
2. SOFTWARE WITH EMPHASIS ON ACCOUNTING/FINANCIAL
3. UNIX
4. EDUCATIONAL & TRAINING

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Import duties are low
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Trade Fair activity

Factors for Canadian exports not reaching market potential:

- LACK OF COMMITTED RESOURCES TO SUST
- -AIN MARKETING EFFORT

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: COMPL A MKT INTRO PACKAGE TO FACILITATE NEW CDN COMP ENTRY
 Expected Results: INCREASE CONFIDENCE LEVEL OF NEW CDN SOFTWR EXPRTS & THEREFORE THEIR PROBABILITY OF SUCCESS.
- Activity: COMP PROJ DELINEAT SALES REPS/DIBTRIB BY PROD/MKT THEY COVER
 Expected Results: FACILITATE QUICKER&CLOSER MATCH BETWEEN US REPS/DISTRIB& CDN SUPPLIERS
- Activity: COMP ADD TO OUR BASE OF CONTACTS WITH SALES REPS/DITRIB.
 Expected Results: INCREASE PROBABILITY OF SUCCESS THROUGH ENLARGED UNIVERSE OF MEANS OF SALES COVERAGE

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

- Activity: ELECTRO APRIL 1989
 Expected Results: INTRODUCE 4 NEW CDN COMP TO NY METRO MARKETS
- Activity: P.C. EXPO JUNE 89
 Expected Results: INTRODUCE 6 NEW CDN COMP TO NY METRO MARKETS
- Activity: INFO SHOW OCT 89
 Expected Results: INTRODUCE 4 NEW CDN COMP TO NY METRO MARKETS
- Activity: UNIXEXPO NOV 89
 Expected Results: INTRODUCE 4 NEW CDN COMP TO NY METRO 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: BETTER UTILIZED WIN/COSICS TO IDENTIFY MORE CDN SUPP OF
 Expected Results: BRODEN BASE OF CDN SOFTWR ENTREPRENEUR WISHING TO ENTER THE NY CITY MARKETS
- Activity: INVESTIGATE IDENTIFICATION OF HARDWR/SOFTWR USERS ALONG WITH
 Expected Results: PROVIDE IDENTIFICATION OF A POTENTIAL CUST BASE FOR CDN SUPPLIERS
- Activity: IDENT.&EVALUATE APPLICABLE TRADE SHOWS/SEMINARS, ETC. FOR
 Expected Results: INCREASE MKT OPPOTRUNITIES FOR CDN SUPP THROUGH GREATER MARKET EXPOSED OPPORTUNITIES.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NEW YORK, CONSULATE GENERAL

Market: UNITED STATES OF AMERICA

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

SOFTWR PROGRAMS FOR FINANCIAL
& ACCOUNTING

Approximate Value: 100000 M\$

Financing Source :

Contact

: DONALD GARRETSON/CNGNY/NY/NY

TELEX 1264242 (DOMCAN NYK)

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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

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: 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: FOLLOW-UP & EVALUATE CDN PARTICIPATION IN THE INT KIDS FASH
Expected Results: \$100,000 ON SITE SALES WITH PROJECTION OF \$750,000. TWO NEW AGENT AGREEMENTS

Activity: FOLLOW-UP & EVALUATE CDN PART'N IN THE SOURCE AMERICA PRIVAT
Expected Results: THREE BUYING CONNECTIONS

Activity: FOLLOW-UP & EVALUATE CDN PARTICIP. IN THE PRIVATE LABEL EXPO
Expected Results: FIVE NEW BUYING CONNECTIONS

Activity: BUYER MISSION FROM N.Y. TO DESIGNER LEATHER APPAREL EVENT
Expected Results: TWO NEW BUYING CONNECTIONS. HEIGHTEN AWARENESS OF HIGH QUALITY FASH LEATHER APPAREL RESOURCES IN CDA TO US MARKET.

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

Activity: PRIVATE LABEL EXPO-JUNE 89 CDN SECTION AT P. LABEL SHOW
Expected Results: 50 NEW U.S. P. LABEL LEADS

Activity: SOURCE AMER P.LABEL EXPO-JUNE 89 CDN SECTION AT P.LABEL SHOW
Expected Results: 30 NEW U.S. P.LABEL CONTACTS

Activity: MTL PRET & COLLECTION INT, MTL OCT89. BUYER MISSION FROM TERR
Expected Results: \$75000 ON SITE SALES, 2 NEW AGENCY AGREEMENTS. PROJECTED SALES OF \$250000.

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

Activity: DISSEMINATE & INPUT ON POST DATABASE-A)200 NEW US CONTACTS
Expected Results: BUILD UP LOCAL CONTACT BASE TO PROVIDE POTENTIAL LEADS & CONTACTS TO CDN MFG INTEREST IN THE NY MKT. CONT TO ESTABLISH

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	275000.00 \$M	26000.00 \$M	23000.00 \$M	2000.00 \$M
Canadian Exports	300.00 \$M	285.00 \$M	276.00 \$M	220.00 \$M
Canadian Share of Market	9.15 %	9.00 %	8.30 %	9.00 %

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

Major Competing Countries

Market Share

TAIWAN	0.00 %
CANADA	0.00 %
ITALY	0.00 %
GERMANY WEST	0.00 %
DENMARK	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 TABLES
2. BEDROOM FURNITURE
3. DINING TABLES
4. LEATHER CHAIRS & SOFAS
5. R.T.A. FURNITURE
6. METAL OCCASIONAL TABLES
7. WOOD WALL SYSTEMS
8. UPHOLSTERY

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: NEW YORK, CONSULATE GENERAL

Market: UNITED STATES OF AMERICA

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Import duties are low
- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Trade Fair activity
- 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:

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

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

Activity: CONT TO HELP NEW EXPRTS FIND THE RIGHT REP. IN THIS MARKET.
Expected Results: INCREASE SALES OF CDN RESIDENTIAL FURNITURE BY APPROX 10%

Activity: MAINTAIN GOOD WORKING RELA'NS W/THE IMP BUY IN THE LARGE
Expected Results: ABLE TO INTRODUCE NEW PRODUCTS IN THIS VERY COMPETITIVE MKT PLACE BECAUSE OF PERSONAL CONTACTS WITH BUYERS

Activity: ONGOING PROGRAM OF EXHIBIT FURNITURE IN CANADA ROOM
Expected Results: TWO NEW EXPORTERS WILL INTRODUCE PRODUCTS IN THE CANADA ROOM

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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: LARGE EXH. OF ROGER ROUGIER NEW DESIGNS ALONG W/PAININGS
Expected Results: INCREASE SALES IN THE INTERIOR DESIGN MKT; & SHOW THESE PAINTINGS FOR THE FIRST TIME IN N.Y.

Activity: INCOMING BUYERS MISSION TO MTL FURNITURE SHOW JUNE 89
Expected Results: EXPECT TO BRING 25 BUY TO THIS SHOW. THIS SHOULD GENERATE FURN SALES IN EXCESS OF 6M FOR THE YEAR.

Activity: INCOMING BUYERS MISSION TO IIDEX 89 NOV 9-11-1989
Expected Results: CDN PRODUCTS TO BE SPECIFIED ON LARGE INSTALLATIONS. 3-4M.

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RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: NEW YORK, CONSULATE GENERAL 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:

THREE HUNDRED TO FIVE HUNDRED MILLION IN DIRECT INVESTMENT
AND UP TO ONE BILLION IN PORTFOLIO INVESTMENT

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

- OTHER USA STATES
- IRELAND
- ENGLAND
- AUSTRALIA
- JAPAN
- SINGAPORE

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

- CALLING PROGRAMS ON INFLUENCERS INCLUDING BANKS, LAWYERS, ACCOUNTANTS
- SEMINARS AND COCKTAIL PARTIES TO INFLUENCERS AND PROSPECTS
- DIRECT MAIL & TELEMARKETING
- MINISTERIAL VISITS

Compared to major competitive destinations, Canada is perceived to have

the following advantages:

- SAME LANGUAGE AND CUSTOMS
- QUEBEC AS A BASE FOR FRANCOPHONE OPERATION
- HIGHLY SKILLED PRODUCTION LABOUR FORCE
- COST/VALUE - CANADIAN DOLLAR
- TRAIN & REGIONAL INCENTIVE

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: NEW YORK, CONSULATE GENERAL

Country: UNITED STATES OF AMERICA

the following constraints:

- HIGH TAXES
- IMMIGRATION PROBLEMS
- UNAVAILABILITY OF LABOUR IN MAJOR MARKETS
- PACKAGING/CSA REQUIREMENTS
- NO INCENTIVES AT LOCAL LEVEL

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	MEDIUM
Strategic Partnering	MEDIUM
Technology Licensing	MEDIUM

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

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

RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABRDAD

Mission: NEW YORK, CONSULATE GENERAL Country: UNITED STATES OF AMERICA

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

	Date
Type: MISSION OUT, INDUSTRY	
MISSION/SEMINAR TO MATCH US VENTURE CAPITALISTS TO CON ENTREPRENEURS	6/89
Location: NEW YORK	
Invest Nature: PORTFOLIO GREENFIELD	
Sector: OTHER SERVICES	
Cooperants: PROVINCES, NY VENTURE GROUP/FORUM	
Estimated Budget: \$5,000.00	
Type: SEMINAR, ABROAD	
SEMINAR-ORIENTED TO BUSINESS OPPORTUNITIES IN CANADA.	11/89
Location: STAMFORD	
Invest Nature: GREENFIELD STRATEGIC PART.	
Sector: ADVANCED TECH. PROD. & SERV	
Cooperants: PROVINCES, WESTFACE	
Estimated Budget: \$2,500.00	
SEMINAR-ORIENTED TO MANUFACTURING OPPORTUNITIES IN CANADA	10/89
Location: NEW YORK	
Invest Nature: GREENFIELD	
Sector: CONSTRUCTION INDUSTRY	
Cooperants: PROVINCES	
Estimated Budget: \$2,500.00	
SEMINAR-ORIENTED TO MANUFACTURING OPPORTUNITIES IN CANADA	9/89
Location: LONG ISLAND	
Invest Nature: GREENFIELD TECH TRANSFER	
Sector: DEFENCE PROGRAMS, PRODUCTS, SERV	
Cooperants: PROVINCES, L.I. ASSOCCN	
Estimated Budget: \$2,500.00	
HALF DAY SEMINAR ON BIO-TECH OPPORTUNITIES IN CD	5/89
Location: NEW JERSEY	
Invest Nature: GREENFIELD TECH. TRANSFER STRATEGIC PART.	
Sector: EDUCATION, MEDICAL, HEALTH PROD	
Cooperants: PROVINCES, USA DEPT OF COMMERCE	
Estimated Budget: \$2,500.00	

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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: NEW YORK, CONSULATE GENERAL Country: UNITED STATES OF AMERICA
Date

Type: ENTREPRENURIAL SEMINAR

3 HOUR SEMINAR IN CONJUNCTION WITH MIDDLE EAST COMMUNITY 11/89

Location: NEW YORK

Invest Nature: GREENFIELD
PORTFOLIO

Sector: MULTIPLE SECTORS

Cooperants: MAJOR LAW FIRM

Estimated Budget: \$1,500.00

3 HOUR SEMINAR IN CONJUNCTION WITH CHINESE COMMUNITY 5/89

Location: NEW YORK

Invest Nature: GREENFIELD
PORTFOLIO

Sector: MULTIPLE SECTORS

Cooperants: MAJOR LAW FIRM, CHINESE COMMUNITY CENTRE

Estimated Budget: \$1,500.00

Type: MISSION IN, TO INDUSTRY

ONE DAY SEMINAR IN OTTAWA FOR PORTFOLIO MANAGERS WITH BANK OF CDA. 5/89

Location: NEW YORK TERRITORY

Invest Nature: PORTFOLIO

Sector: OTHER SERVICES

Cooperants: FEDERAL GOVY DEPTS, BANK OF CDA, FINANCE, DRIE

Estimated Budget: \$6,000.00

Type: DIRECT MAIL CAMPAIGN

ONGOING DIRECT MAIL PROGRAM WITH PHONE FOLLOW-UP 0/00

Location: ACROSS TERRITORY

Invest Nature: DIRECT
GREENFIELD
ACQUISITION

Sector: MULTIPLE SECTORS

Cooperants: PROVINCES

Estimated Budget: \$35,500.00

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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: NEW YORK, CONSULATE GENERAL

Country: UNITED STATES OF AMERICA
Date

Type: OUTCALL PROGRAM

NORMAL PROGRAM OF VISITING PROSPECTS & ED ORGANIZATIONS

0/00

Location: ACROSS TERRITORY

Invest Nature: GREENFIELD

ACQUISITION

PORTFOLIO

Sector: MULTIPLE SECTORS

Cooperants:

Estimated Budget: \$15,000.00

Total estimated budget for all proposals:

\$74,500.00

Post : NEW YORK, CONSULATE GENERAL

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Post/Contact</u>
89/04/11	ELECTRO'89-ELECTRONICS SHOW NEW YORK FAIR, NATIONAL STAND	ADVANCED TECH. PROD. & SERV
89/04/17	SOLO SHOW HAMILTON BERMUDA FAIR, NATIONAL STAND	AGRI & FOOD PRODUCTS & SERVICE P.SCHUTTE
89/06/20	PC EXPO - COMPUTER SHOW NEW YORK FAIR, NATIONAL STAND	ADVANCED TECH. PROD. & SERV K.MUNRO
89/10/22	INT'L KIDS FASHION SHOW FALL NEW YORK FAIR, NATIONAL STAND	CONSUMER PRODUCTS N.PEACOCK
90/01/00	ASHRAE-AMERICAN SOC. OF HEATIN G, REFRIG., & AIR COND. FAIR, NATIONAL STAND	INDUSTRIAL MACHIN, PLANTS, SERV
90/03/00	INT'L KIDS FASHION SHOW SPRING NEW YORK FAIR, NATIONAL STAND	CONSUMER PRODUCTS

RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: SAN FRANCISCO

Country: UNITED STATES OF AMERICA

CALIFORNIA REMAINS KEY ARENA FOR CDN INTERESTS. AMERICA'S LEADING IMPORT-EXPORT STATE ALSO HAS GREATEST POP. AND MOST DIVERSIFIED ECONOMY IN POST TERRITORY. EMPLOYMENT, INCOME, RETAIL SALES AND HOUSING ACTIVITY SHOULD TRANSLATE INTO CONTINUED ECONOMIC GROWTH; CAL IS ENTERING ITS 7TH YEAR OF EXPANSION, THE ECONOMY IS SLOWING DOWN, AND WHILE NOT LOOKING AT A RECESSION, CAL. IS AWARE THE ECONOMY IS BECOMING MORE VULNERABLE. WHILE INCREASED SINGLE FAMILY HOUSING STARTS AND STRONG CONSUMER SPENDING ARE CONTRIBUTING FACTORS TO STRONG ECONOMY, RISING INTEREST RATES AND LOWER INCOME GROWTH MAY MODERATE IT IN 1989/90. NONRES. CONSTRUCTION DECLINES & SLOW DOWNS IN OTHER KEY SECTORS SHOULD KEEP UNEMPLOYMENT AND INFLATION RATES AT ABOUT 5% AND 5.2% IN 1989 AND 4.9% AND 4.4% IN 1990. CAL'S AGRIC INDUSTRY IS RECOVERING, ASSISTED BY LOWER INTEREST RATES AND ENERGY COSTS, INCREASED YIELDS, EFFICIENCY AND FEDERAL SUPPORT. WITH PERSONAL INCOME PROJECTED TO INCREASE 7.3% NEXT YEAR, CONSUMER PURCHASES OF HIGH QUALITY PRODUCTS SHOULD GROW PROPORTIONATELY. CAL'S MANUF. SECTOR HAS RESUMED MODERATE EXPANSION. BILATERAL TRADE AND INVESTMENT FACE INCREASING COMPETITION FROM OTHER STATE PROMOTIONAL PROGRAMMES BOTH NATIONALLY AND INTERNATIONALLY AIMED AT PACIFIC RIM. MODERATE DECLINES IN CAL'S U.S. DEFENCE PRODUCTS MARKET EXPECTED AS NEW ADMINISTRATION STRUGGLES TO CONTROL BUDGETARY EXPENDITURES. WHILE SOME DECLINE IN CDN DEFENCE OPPORTUNITIES OVER NEXT 3-4 YEARS ANTICIPATED, MKT SIZE AND INCREASING CDN SUCCESS STILL OFFER SIGNIFICANT OPPORTUNITIES FOR CDN DEFENCE COMPUTER SYSTEM SUB-CONTRACTORS AND CDN MACHINING/FDRGING/WELDING/CASTING FIRMS WITH MIL SPEC/QUALITY CONTROL SYSTEMS. SILICON VALLEY REMAINS FOCAL POINT FOR HIGH TECHNOLOGY TRADE, INVESTMENT PROMOTION AND TECHNOLOGY TRANSFER. COMPUTER AND BIOTECH FIRMS CONTINUE STRONG GROWTH. RECENT MAJOR SUCCESSES BY CDN SUPPLIERS OF SUCH ITEMS AS PRINTED CIRCUIT BOARDS AND POWER SUPPLIES INDICATE SIGNIFICANT POTENTIAL FOR CDN FIRMS. OF OVER 750 BIOTECH FIRMS IN CAL., ABOUT 250 LOCATED IN POST TERRITORY. RECENT CDN PROMD EFFORTS YIELDING JOINT VENTURES AND DIRECT SALES DEFINE NEW SALES FOCUS. CDN AND U.S. REGULATORY DECISIONS CONTINUE TO AFFECT NATURAL GAS PRICES AND CONTRIBUTE TO TRANSPORT PROBLEMS. CDN NATURAL GAS SALES IN N. CAL FACE PROJECTED FLAT DEMAND PRIMARILY DUE TO ANTICIPATED RETURN TO NORMAL HYDR-ELECTRIC CONDITIONS. MKTING EFFORTS LIKELY HAMPERED BY U.S. SPDT MARKET PRICES, PIPELINE CAPACITY, AND RECENT DRAMATIC DECLINES IN FUEL OIL PRICES. AIR QUALITY, COMMUTE TIMES, PARKING AND SUBURBAN CONGESTION CONCERNS RESULTING IN EXPANDED TRANSPORTATION SERVICES. OPPORTUNITIES EXIST FOR MAJOR LIGHT RAIL CAR AND BUS MANUFACTURERS AND MAKERS OF ASSOCIATED EQUIPMENT. HIGH LEVEL CONSUMER SPENDING BY N. CAL'S AFFLUENT POP. AND 8M TOURISTS PROVIDE CDN SUPPLIERS OF CONSUMER/LEISURE PRODUCTS WITH LUCRATIVE RETAIL SALES MARKET. MORE DISPOSABLE INCOME BEING SPENT ON OUTDOOR ACTIVITIES. WHILE CDN MANUF. ENJOY A REPUTATION FOR RUGGED, QUALITY PRODUCTS, COLD WEATHER SPECIALIZATION LINGERS. N. CAL OFFERS EXCELLENT EXPORT POTENTIAL FOR CONTRACT FURNITURE, APPAREL, GOURMET PRODUCTS, GIFTWARE, HOSPITALITY SUPPLIES, FOOD PRODUCTS AND THE WHOLE GAMBIT OF RELATED CONSUMER PRODUCTS. ROCKY MTN

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: SAN FRANCISCO

Country: UNITED STATES OF AMERICA

REGION STILL REFLECTS WEAKENED AGRICULTURE AND RESOURCE INDUSTRIES. WY AND CO BENEFITTING FROM PETROLEUM INDUSTRY'S CAUTIOUS REVIVAL AND INCREASING MINING EQUIPMENT SALES. CDN DEFENCE ELECTRICAL AND ELECTRO-MECHANICAL AND COMPUTER COMPONENT MANUF.HAVE GOOD POTENTIAL TO SUB-CONTRACT AS DEFENCE CONTRACTS AWARDED IN CO AND UT. DENVER'S FUTURE URBAN TRANSIT PLANS COULD RESULT IN 1/28 DLR SALE. OUTLOOK FOR TERRITORY:"BUSINESS AS USUAL" WITH "CAUTIOUS" UMBRELLA OVER SOME KEY SECTORS.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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
DRAMATIC INCREASES IN CDN CAPABILITY IN HIGH TECH ELECTRONICS SECTOR, COMPLIMENTS 20% CDN INDUSTRY GROWTH OVER THE LAST THREE YEARS. SILICON VALLEY REMAINS CENTER FOR SECTOR R & D AND OFFERS POTENTIAL FOR COST COMPETITIVE GOODS, BACKED BY GOOD CUSTOMER SERVICE.
2. ADVANCED TECH. PROD. & SERV
GOOD OPPORTUNITIES EXIST FOR SUPPLIERS OF SUB-COMPONENTS FOR COMPUTER SYSTEMS SUCH AS POWER SUPPLIES, CONNECTORS, BOARDS, ETC.
3. DEFENCE PROGRAMS, PRODUCTS, SERV
U.S.A. DEFENCE INDUSTRIES WILL BE AFFECTED BY DECISIONS OF THE NEW GOVT. NEVERTHELESS, GOOD OPPORTUNITIES EXIST IN ELECTRONICS AND FABRICATION AND SOME ASSEMBLY FOR CDN SUBCONTRACTORS TO U.S. PRIMES LOCATED IN NO. CALIFORNIA, COLORADO AND UTAH AND WITH HILL AIR FORCE BASE IN OGDEN, UTAH.
4. TRANSPORT SYS, EQUIP, COMP, SERV.
FINANCING VITAL FACTOR IN RAIL DECISIONS. UT FACES TAX ROLLBACK MEASURES, THREATENS PROPOSED LITE RAIL. HI WILL BUILD IN '90. MUNI WILL INSTALL AUTO TRACK CONTROL & BUY MORE BUSES. BART WILL EXTEND CONTRA COSTA AND MARIN COUNTIES WILL CONSIDER LITE RAIL. DENVER RECOGNISES SAME NEED, BUT POLITICALLY TANGLED.
5. CONSUMER PRODUCTS & SERVICES
MARKET SIZE (11+ MILLION POP., 8+ MILLION ANNUAL TOURISTS TO S.F. ALONE), AFFLUENCY/DISPOSAL WEALTH; ALSO MAJOR REGIONAL/NATIONAL TRADE CENTER FOR VARIOUS CONSUMER PRODUCTS. OPPORTUNITIES FOR CONTRACT FURNITURE, WOMEN'S BETTER APPAREL, VISUAL MERCHANDISING PRODUCTS, GOURMET PRODUCTS/GIFTWARE.
6. AGRI & FOOD PRODUCTS & SERVICE
SHEER MAGNITUDE OF MARKET. HIGHLY COMPETITIVE, OPPORTUNITIES EXIST FOR CAPABLE, DETERMINED SUPPLIERS OF QUALITY, COMPETITIVELY PRICED, CREATIVELY PACKAGED OR UNIQUE PRODUCTS FOR RETAIL AND INSTITUTIONAL/HOSPITALITY SALES OF PROCESSED AND SEMI-PROCESSED FOODS.

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

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

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	15000.00 \$M	15500.00 \$M
Canadian Exports	140.00 \$M	160.00 \$M	180.00 \$M	200.00 \$M
Canadian Share of Market	1.00 %	1.20 %	1.20 %	1.40 %

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 %
WEST EUROPE	80.00 %

Products/services for which there are good market prospects:

1. PROCESSED & SEMI PROCESSED FOOD RETAIL MARKET
2. PROCESSED & SEMI PROCESSED FOOD INST/HOSP MARKET
3. MEAT & MEAT PRODUCTS RETAIL
4. MEAT & MEAT PRODUCTS INSTITUTIONAL/HOSPITALITY

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- PEHD support
- Fairs and Missions support
- Trade Fair activity
- Provincial export promotion
- Competitive pricing

Factors for Canadian exports not reaching market potential:

- Unsuitable product
- Limited appreciation/understanding of distribution system
- Limited Canadian capabilities
- COMPANIES TOO SMALL TO COMPETE -
- HIGH FREIGHT COSTS

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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: CONTINUE TO WORK WITH INDIVIDUAL COMPANIES
Expected Results: OBTAIN LOCAL SALES REPRESENTATION

Activity: CONTINUE TO WORK WITH PROVINCIAL GOVERNMENTS
Expected Results: ASSIST COMPANIES UNDERSTAND LOCAL MARKET AND PLACE PRODUCTS WITH 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: INT'L FANCY FOOD & CONFECTIONERY TRADE SHOW, SFRAN CDN PAVIL.
Expected Results: 50% COS SUCCESSFUL TO OBTAIN LOCAL SALES REPRESENTATION OR ESTABLISH/INITIATE DIRECT SALES PROGRAM AS CAN BE APPROP. FOR

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	3500.00 \$M	4000.00 \$M	5400.00 \$M	5250.00 \$M
Canadian Exports	100.00 \$M	145.00 \$M	200.00 \$M	260.00 \$M
Canadian Share of Market	3.00 %	3.60 %	4.00 %	4.50 %

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 %
OTHER COUNTRIES	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. ELECTRO OPTICS
6. DRONES
7. COMPUTER COMPONENTS (CONNECTORS, HOUSINGS)
8. ELECTRO-ELECTRICAL, MECHANICAL
9. MICROWAVE EQUIPMENT
10. CASTINGS/ FORGINGS
11. PRECISION MACHINING

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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
- 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
- DEFENCE PRODUCTS SHARING
- AGREEMENT & INDUSTRIAL
- BENEFITS COMMITMENTS

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
- EXTREMELY DIFF TO BID COMP EVEN W/
- DEF PROD SHARING EQUIP CO MUST BE

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

- Activity: DEVELOP BETTER CONTACTS W/BUYER IN THE VALLEY. U.S. DEFENCE
- Expected Results: WITH BETTER UNDERSTANDING OF LARGE BUYER NETWORK, POST CAN BETTER ASSIST CDN EXPORTERS.

- Activity: DEVELOP BETTER CONTACTS W/BUYERS IN CO & UT (TRW ELECTRONIC)
- Expected Results: AS ABOVE, & WORK W/CPYS TO MEET "INDUSTRIAL BENEFITS" OBLIGATIONS.

- Activity: FURTHER EXPAND RELATIONSHIP W/FMC CORP IN SAN JOSE TO MEET
- Expected Results: SALES IN FABRICATED PRODUCTS

- Activity: DEVELOP BETTER CONTACTS W/MCCLELLAND & HILL AFB'S
- Expected Results: INCREASED SALES & EXPAND CDN DEFENCE PRODUCTS SOURCED

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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: DEFENCE ELECTRONICS SHOW PARTICIPATION
Expected Results: SALES

Activity: OBTAIN LIST OF MAJOR US COS W/OFFSET DEBTS & PURSUE THEM TO
Expected Results: INVESTMENT/ DIRECT SALES

Activity: CDN DEF SUB-CONTR MISS TO UT & CO TO MEET W/US PRIMES & HILL
Expected Results: DIRECT SALES AND ESTABLISHMENT OF NEW BUYER 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: UPDATE/EXPANSION OF CALIF BASED LOCAL REPS OF CDN DEF & ADV.
Expected Results: EXPAND SCOPE OF EXCELLENT RESOURCE BOOK FOR US DEFENCE PRIME CONTRACTORS.

Activity: DEV PDST TERR NEWSLETTER TO IDENT NEW CDN DEF PROD & LOCAL
Expected Results: TO EXPAND/EXPLORE MARKET OPPORTUNITIES THEREBY IDENTIFYING NEW SALES

Activity: PURCHASE OF DATA QUEST MILITARY MARKET INFORMATION SERVICES
Expected Results: GIVE UP-TO-DATE MARKET INFORMATION TO IDENTIFY NEW OPPORTUNITIES

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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 still in the planning stage which provide opportunities for Canadian suppliers:

DRONE PURCHASES

Approximate Value: 100 M\$
Financing Source :
Contact : SANTA CLARA/CASEY

PRINTED CIRCUIT BOARDS

Approximate Value: 100 M\$
Financing Source :
Contact : SFRAN/ZEISLER

CASTINGS/FORGINGS/WELDING

Approximate Value: 50 M\$
Financing Source :
Contact : SFRAN/ZEISLER

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	820.00 \$M	950.00 \$M	1000.00 \$M	1001.00 \$M
Canadian Exports	164.00 \$M	220.00 \$M	250.00 \$M	275.00 \$M
Canadian Share of Market	20.00 %	23.00 %	25.00 %	27.40 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	0.00 %
JAPAN	0.00 %
GERMANY WEST	0.00 %
OTHER COUNTRIES	0.00 %

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

Products/services for which there are good market prospects:

1. TELECOM PRODUCTS
2. TEST EQUIPMENT
3. COMPONENTS
4. SATELLITE COMS

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

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: WESCON NOV 14-16, 1989
Expected Results: SALES/ DISTRIBUTION

Activity: SUPERCOM MAY 22-25, 1990
Expected Results: SALES/ DISTRIBUTION

Activity: COMDEX - NOVEMBER '89 (LAS VEGAS)
Expected Results: SALES/ DISTRIBUTION

Activity: ELECTRONIC REPS MISSION - SEPTEMBER '89
Expected Results: SALES/ DISTRIBUTION

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	130.00 \$M	150.00 \$M	175.00 \$M	200.00 \$M
Canadian Exports	13.00 \$M	15.00 \$M	17.50 \$M	21.00 \$M
Canadian Share of Market	10.00 %	10.00 %	10.00 %	10.50 %

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 %
UNITED KINGDOM	5.00 %
OTHER COUNTRIES	0.00 %

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

Products/services for which there are good market prospects:

1. COMPUTER GRAPHICS
2. OPERATING SYSTEMS
3. DATA BASE
4. FINANCIAL PACKAGES
5. PC SOFTWARE

Factors contributing to current successful Canadian exports:

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

RPTCL

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
- MORE LOCAL PRESENCE NEEDED TO BE
- SUCC. BETTER DISTRB NEEDED BY CDN

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

Activity: CONTINUED QUALIFICATION OF CDN REPS TO ASSIST CDN FIRMS
Expected Results: WITH MORE LOCAL REPS AWARE OF CDN FIRMS, THERE WILL BE MORE LOCAL EXPOSURE FOR CDN PRODUCTS.

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

Activity: WESTCON NOV. 14-16, 1989
Expected Results: SALES & DISTRIBUTION

Activity: UNIFORM FEB 27 - MAR 2, 1990
Expected Results: SALES & DISTRIBUTION

Activity: H.P. USERS SEPT 10-15, 1989
Expected Results: SALES & DISTRIBUTION

Activity: COMPUTER SOFTWARE RETAIL BUYERS MISSION TO CANADA
Expected Results: SALES & DISTRIBUTION

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 W/PROC OFF OF MAJOR COMPUTER MFRS IN SILICON VALLEY
Expected Results: SALES

Activity: CANEXPO SOLO SHOW TO INTRO CDN FIRMS TO LOCAL PARTNERS
Expected Results: SALES

Activity: DISCUSS SOURCING OPP FOR CDN FIRMS W/SUBSID OF LARGE LOCAL
Expected Results: SALES

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	4000.00 \$M	5000.00 \$M	5500.00 \$M	5600.00 \$M
Canadian Exports	80.00 \$M	100.00 \$M	105.00 \$M	107.00 \$M
Canadian Share of Market	2.00 %	2.00 %	2.00 %	2.10 %

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

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	0.00 %
JAPAN	0.00 %
WEST EUROPE	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. PERIPHERALS
2. MONITORS
3. POWER SUPPLIES
4. BOARDS

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

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

Activity: DEVELOP CONT & MANU ON HOW TO USE DEM,VAR,RETAIL DISTRB FOR
Expected Results: MORE CDN SOFTWARE CARRIED BY U.S.A. VENDERS

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

Activity: COMDEX, NOVEMBER'89 (LAS VEGAS)
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: NEWSLETTER
Expected Results: DISTRIBUTION AGREEMENTS SIGNED

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	100.00 \$M	200.00 \$M	400.00 \$M	400.00 \$M
Canadian Exports	25.00 \$M	50.00 \$M	200.00 \$M	260.00 \$M
Canadian Share of Market	25.00 %	25.00 %	50.00 %	65.00 %

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

Major Competing Countries

Market Share

FRANCE	15.00 %
GERMANY WEST	10.00 %
JAPAN	10.00 %
SWEDEN	5.00 %
ITALY	3.00 %
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. COMPONENTS
4. CONSULTANTS
5. TRANSIT TELECOMMUNICATIONS

Factors contributing to current successful Canadian exports:

- Canada is one of few sources of supply
- Strong sectoral capability in Canada

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Non-competitive financing
- BUY AMERICA RESTRICT-
- TIONS
- NO LOCAL REPRESENTATION

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: RE-ACQUAINT HONOLULU RAPID TRANSIT OFF & OTHER INTER PARTIES
 Expected Results: HRT EXPECTS TO CALL TENDERS SEPT 89. PROP TO BE SUBMITTED ON PERFORM NOT SPEC BASIS, W/CONSID. DISCRETION TO DECISION MAKER

Activity: POSITION CDN TRANSIT CONS TO BE SELECTED AS MUNIS CASTRO-EMB
 Expected Results: CDN SPECIFIER INCREASES LIKEHOOD SEL CDA BEING SELECTED CONTROLS SUPPLIERS

Activity: MONIT PROGRESS ON HI-SPEED RAID CORRIDOR (LA TO SACREMENTO)
 Expected Results: RAIL CARS AND COMPONENTS COULD TOTAL C\$150 M

Activity: BOLSTER BART'S INTEREST IN SELTRAC
 Expected Results: SEL CANADA WILL REVIEW BART'S PRESENT SIGNALLING, & SHOULD SUBMIT PROPOSAL.

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

Activity: ATTEND WESTERN APTA CONFERENCE, APRIL 1989
 Expected Results: LEARN LATEST TRANSIT CONCERNS, PROMOTE 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: MAKE PRESENT W/AND EDC OFF TO AS MANY HONOLULU RAPID TRANSIT
 Expected Results: HRT WILL CALL TENDERS IN SEPT88 ON PERFORM NOR SPEC. BASIS, LEAVING CONSIDERABLE DISCRETION TO DECISION MAKERS.

Activity: FOLLOW-UP UTAH TRANSIT AUTH'S TOUR OF LIGHT RAIL PROPERTIES
 Expected Results: RELYING ON SOLID PERSONAL RELATIONSHIP ESTAB. W/MOST PARTIES, HOPE TO INSURE CDN PARTICIPATION.

Activity: ATTEND MEETINGS IN THE BAY AREA REGARD. EXPAN. OF BART SERVICE
 Expected Results: DISTRB. INFO TO VEHICLE CONTRL MFRS. ATTEMPT TO REPLACE FRENCH SUPPLIER OF BART CARS. VALUE: C\$320M

Activity: SUPPORT CONTRA COSTA COUNTY'S INVESTIGATION OF TRANSIT ALTER
 Expected Results: FAMILIARITY W/CDN COYS WILL BE ESTABLISHED.

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 still in the planning stage which provide opportunities for Canadian suppliers:

BART EXTENSION, INCLUDING TO AIRPORT	Approximate Value: 2000 M\$ Financing Source : DOM - Domestically funded EDC - Export Dev Corporation Contact : R. RHEA, COMMERCIAL OFFICER, SFRAN 415/495-6021
HONOLULU ADVANCED LIGHT RAIL TRANSIT	Approximate Value: 900 M\$ Financing Source : DOM - Domestically funded EDC - Export Dev Corporation Contact : R. RHEA, COMMERCIAL OFFICER, SFRAN 415/495-6021
SALT LAKE CITY LIGHT RAIL	Approximate Value: 320 M\$ Financing Source : DOM - Domestically funded EDC - Export Dev Corporation Contact : R. RHEA, COMMERCIAL OFFICER, SFRAN 415/495-6021
MUNI AUTOMATED TRACK CONTROL	Approximate Value: 24 M\$ Financing Source : DOM - Domestically funded EDC - Export Dev Corporation Contact : R. RHEA, COMMERCIAL OFFICER, SFRAN 415/495-6021

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: SAN FRANCISCO

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	3380.00 \$M	3450.00 \$M	3250.00 \$M	3450.00 \$M
Canadian Exports	10.00 \$M	10.00 \$M	10.00 \$M	20.00 \$M
Canadian Share of Market	0.40 %	0.40 %	0.40 %	0.40 %

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

Major Competing Countries	Market Share
HONG KONG	5.00 %
PEOPLE'S REP OF CHINA	4.00 %
KOREA	4.00 %
SOUTH AMERICA	2.00 %
CENTRAL AMERICA	2.00 %
WEST 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. WOMEN'S HIGH END FASHION COORDINATES(FALL & SPRING)
2. WOMEN'S HIGH END FASHION SPORTSWEAR(FALL & SPRING)

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- 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: 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: MEET WITH TORONTO APPAREL MFRS - FOLLOW UP WITH LOCAL REPS
Expected Results: ASSESSMENT OF PRODUCT FOR SPECIFIC MKT. MEETINGS ARE TO ASCERTAIN INDIVIDUAL CO COMMITMENT TO EXPORT TO TERRITORY NOW.

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 REP LOCATOR MISSION TO TERRITORY - 8-12 COMPANIES
Expected Results: NEW AGENT APPOINTMENTS WITH PROSPECTS FOR .3M-.7M ANNUAL SALES WITH 2 YEARS PER COMPANY

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: SAN FRANCISCO

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	60.00 \$M	60.00 \$M	60.00 \$M	65.00 \$M
Canadian Exports	1.20 \$M	1.20 \$M	1.80 \$M	2.80 \$M
Canadian Share of Market	2.00 %	2.00 %	3.00 %	3.20 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	0.00 %
EUROPEAN COMMON MARKET C	0.00 %

Products/services for which there are good market prospects:

1. DESIGN PRODUCTS/SERVICES
2. STORE FIXTURES

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Fairs and Missions support
- Strong sectoral capability in Canada
- Willingness of exporters to invest/joint venture in territory

Factors for Canadian exports not reaching market potential:

- CDN CAPABILITIES EXCELLENT FOR GRE-
- ATER MKT SHARE OF THIS PROFIT BUS.

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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: WESTERN VISUAL MERCH SHOW, SFRAN, MAR 18-21/89 CON PAVILLION
Expected Results: INITIATE SALES FOR APPROX. 8 MFRS IN FOLLOWING YR. (MOST SALES AFTER SHOW) TO EQUAL 3 MILLION FIRST YR.

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

Activity: WESTREN VISUAL MERCH SHOW, SFRAN-MAR 25-28/90 FAIR PARTICIP.
Expected Results: 50% OF COYS SUCCESSFUL INITIATING &/OR FURTHERING SALES INTO WSTRN U.S. & INTRO TO EASTERN ACCOUNT WHO VISIT W.COAST SHOW

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	175.00 \$M	185.00 \$M	200.00 \$M	220.00 \$M
Canadian Exports	8.00 \$M	9.00 \$M	12.00 \$M	17.00 \$M
Canadian Share of Market	5.00 %	5.00 %	6.00 %	8.00 %

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

Major Competing Countries	Market Share
TAIWAN	0.00 %
HONG KONG	0.00 %
FRANCE	0.00 %
GERMANY WEST	0.00 %
PEOPLE'S REP OF CHINA	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. BICYCLES
2. BIKE ACCESSORIES
3. CAMPING EQUIPMENT
4. PLEASURE BOATS
5. GOLF ACCESSORIES

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- PEMD support
- CANADA ENJOYS REPUTATION
- FOR RUGGED PRODUCTS

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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:

- Non-competitive pricing
- Lack of promotion and advertising
- MANY PRODUCTS ARE LABOR INTENSIVE,
- UNDER PRICED BY ASIAN MANUFACTURERS

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

Activity: CONTINUE PUBLISHING SPORTING GOODS - RESEARCH (IN-HOUSE)
Expected Results: NOTIFY REPS, DISTRIBUTORS AND RETAILERS OF PRODUCTS FROM CANADA

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

Activity: CDN SPORT GOODS ASSN ANN WEST SHOW, SEPT '89. SEND QUAL BUYERS
Expected Results: DISTRIBUTORS & DEALERS W/HIGH VOLUME WILL PICK UP NEW LINES.

Activity: INTERBIKE '89 FALL (REND)
Expected Results: BIKE MARKET, ESPECIALLY MOUNTAIN BIKES, IS GROWING. THIS IS THE SHOW.

Activity: CSGA NAT'L CONV & EXH, FEB '90. QUALIFY BUYERS FOR SHOW (MONT)
Expected Results: DISTRIBUTORS & DEALERS W/HIGH VOLUME WILL 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: INT'L MARINE EXPO HELD IN CONJ W/GOLDEN GATE OPEN SAIL BOAT
Expected Results: CDN MANUFACTURERS WILL HAVE OPPORTUNITY TO DISPLAY GOODS TO BIGGER CROWD THAN TYPICAL BOAT SHOWS.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	1300.00 \$M	1400.00 \$M	1500.00 \$M	1600.00 \$M
Canadian Exports	3.20 \$M	4.20 \$M	2.50 \$M	6.40 \$M
Canadian Share of Market	2.50 %	3.00 %	3.50 %	4.00 %

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	0.00 %
KOREA	0.00 %
WEST EUROPE	0.00 %

Products/services for which there are good market prospects:

1. CONTRACT FURNITURE
2. HOSPITALITY FURNITURE

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- PEMD support
- Fairs and Missions support
- Trade Fair activity
- Provincial export promotion
- Competitive pricing
- Strong sectoral capability in Canada

Factors for Canadian exports not reaching market potential:

- Import restrictions are a significant impediment in this sector
- Limited appreciation/understanding of distribution system
- TEXTILES: STAND HIGH-
- ER THAN REST OF U.S.
- IT TAKES TIME FOR CDN COS TO ACQUI-
- RE EXPER NEEDED IN UNDERST MKT & S

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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: RECRUIT & ACCOMPANY 15-20 BUYERS TO IIDEX, NOVEMBER 1989
Expected Results: INCREASE CDN SALES, EXPOSE MORE PRODUCTS & COMPANIES TO SPECIFIERS

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: SAN FRANCISCO

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	2000.00 \$M	1300.00 \$M	1000.00 \$M	900.00 \$M
Canadian Exports	100.00 \$M	52.00 \$M	37.40 \$M	32.40 \$M
Canadian Share of Market	5.00 %	4.00 %	3.20 %	3.60 %

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

Major Competing Countries	Market Share
JAPAN	0.00 %
WEST EUROPE	0.00 %
CANADA	0.00 %

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

Products/services for which there are good market prospects:

1. AG BIO
2. THERAPUTIC
3. CHEMICALS
4. FERMENTORS

Factors contributing to current successful Canadian exports:

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

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: 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
- Market prospects have not been adequately explored

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

Activity: BIOTECH U.S.A. 1989
Expected Results: SALES/DISTRIBUTION/PARTNERSHIPS

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

Activity: MARKET STUDY

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: SAN FRANCISCO

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:

\$200 MILLION / BAY AREA.

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

- BRITAIN (4.6 BILLION)
- NETHERLANDS
- GERMANY
- IRELAND
- JAPAN (4.6 BILLION)

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

- WEEKLY DIRECT ADVERTISEMENT OF SPECIFIC JOINT VENTURE OPPORTUNITIES BY THE NETHERLANDS.
- DIRECT SEMINARS ON EEC BY FRANCE, SCOTLAND, IRELAND.
- IRELAND, SCOTLAND, NETHERLANDS, JAPAN HAVE OFFICES OF 3 - 20 PEOPLE.

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

- AMERICAN HIGH TECH FIRMS NOW REFOCUSING ATTENTION TO EEC.
- CANADA MAY BE LEFT OUT AS A RESULT.
- LOCAL FIRMS UNAWARE OF BENEFITS OF MANUFACTURING IN CANADA.

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

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

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RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: SAN FRANCISCO

Country: UNITED STATES OF AMERICA

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

Sector	Ranking
Agriculture/Food/Fish	10
Resource Processing	10
Machinery and Equipment	7
Transportation	7
Consumer Products	7
Commercial Service	10
Computer and Communications	1
Aerospace and Defence	1
Strategic Technologies	2

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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: SAN FRANCISCO

Country: UNITED STATES OF AMERICA

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

Date

Type: OTHER PROMOTION

STUDY OF OUR COMPETITORS INVESTMENT ACTIVITIES.

0/89

Location: SAN FRANCISCO

Invest Nature:

Sector: EDUCATION, MEDICAL, HEALTH PROD

Cooperants: SRI

Estimated Budget: \$30,000.00

Total estimated budget for all proposals: \$30,000.00

RPTBL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: SEATTLE

Country: UNITED STATES OF AMERICA

THE ECONOMICAL ENVIRONMENT IN ALL AREAS OF THE POST TERRITORIES CONTINUED THROUGHOUT 1988 TO BE VERY POSITIVE. WHILE ALASKA HAS TENDED TO HAVE SLIGHTLY LESS GROWTH THAN OTHER POST STATES WE CAN REPORT THAT THERE ARE GOOD INDICATORS THAT 1989 WILL SEE ALASKA REALLY START TO GET OUT FROM UNDER THEIR RECENT DEPRESSION ARISING FROM THE 1986 OIL PRICE DROP. IN SEATTLE THE CONSTRUCTION SURGE REACHED NEW HEIGHTS, AND WHILE MOST MAJOR ROAD WORK WILL BE COMPLETED IN 1989, WORK ON NEW OFFICE AND STORES BUILDING AND THE UNDERGROUND METRO SYSTEM WILL CONTINUE AT A HIGH LEVEL THROUGHOUT 1989 AND INTO 1990. ALL KEY SECTORS INCLUDING AEROSPACE, ELECTRONICS, SOFTWARE, TRANSPORTATION SERVICES AND THE RETAIL INDUSTRIES EXPERIENCED APPRECIABLE GROWTH IN 1988. SPECIAL MENTION MUST BE NOTED OF THE BOEING AIRCRAFT CO., WHILE COMPLETE FIGURES ARE NOT AVAILABLE, THEY HAVE CONTINUED ALL YEAR TO BREAK EVERY RECORD IN AIRCRAFT SALES. AS IN 1987, THE POST TERRITORIES EXPERIENCED LONG PERIODS OF HOT DRY WEATHER. THE EFFECTS ON WATER RESERVES, WINTER CROPS AND SOIL MOISTURE LEVELS IS EXPECTED TO BE AS SEVERE AS 1987 AND DEPENDING ON THE WEATHER OVER THE NEXT FEW MONTHS, AGRICULTURE, ELECTRICITY PRODUCTION, TOURISM, AND THE FISHERIES INDUSTRIES COULD FACE SOME HARDSHIPS. 1988 SAW A DECREASE IN UNEMPLOYMENT BY APPROXIMATELY 0.4% AND THE GENERAL PROGNOSIS IS THAT 1989 SHOULD SEE FURTHER IMPROVEMENT IN THE UNEMPLOYMENT RATE.

IN 1987 EXPORTS TO THE 4 STATES REGION TOTALLED CLOSE TO \$4,700,000.00 UP ABOUT 10% ON 1986. GEOGRAPHICALLY THE STATE OF WASHINGTON ACCOUNTED FOR APPROXIMATELY 45% OF ALL EXPORTS FROM CANADA, AND THE PROVINCES OF BC AND ALBERTA RESPONSIBLE FOR OVER 85%. THERE HAS BEEN A STEADY FLOW OF INVESTMENT INTO THE POST TERRITORIES, AND AGAIN THE STATE OF WASHINGTON APPEARS TO HAVE BEEN THE MAIN BENEFICIARY. CANADA IS THE LARGEST SINGLE INVESTOR IN THAT STATE, CREATING OVER 12,000 JOBS, WHETHER OR NOT THE FTA BECOMES EFFECTIVE IN 1989, THE CLIMATE AND CONDITIONS FOR CANADIAN INVESTMENT IN THE POST TERRITORY REMAINS ATTRACTIVE.

DEBATE CONTINUES WITH RENEWED EMPHASIS OVER THE MERITS OF A RAIL SYSTEM FOR THE PUGET SOUND REGION. IN COMMON WITH SOME 40 OTHER US REGIONS THE GROWING DEMAND ON EXISTING TRANSIT SYSTEMS WILL FORCE MANY OF THEM TO MAKE DECISIONS OVER THE NEXT DECADE. PRELIMINARY ESTIMATES FOR THE CAPITAL COSTS ALONE OF A LIGHT RAIL SYSTEM IN THE PUGET SOUND REGION ARE IN THE \$4.5 BILLION BALLPARK. THE POST INTENDS TO MONITOR DEVELOPMENTS IN THIS AREA AND TO MAINTAIN COMMUNICATION WITH LOCAL OFFICIALS, PLANNERS, AND OTHER INTERESTED GROUPS.

THIS OFFICE WILL CONTINUE TO PLACE PRIORITY EMPHASIS ON ITS ROLE AS A MAJOR BORDER POST FOCUSING ITS EFFORTS WITH THE PROVINCES AND REGIONAL OFFICES OF WESTERN CANADA TO ENCOURAGE AND ASSIST NEW EXPORTERS GAINING A Foothold IN THE MARKETS OF THE PACIFIC NORTHWEST. PROGRAMS LIKE NEBS WILL PLAY AN IMPORTANT PART IN ENSURING THAT WE ARE ABLE TO TAKE ADVANTAGE OF OPPORTUNITIES IN SPECIFIC AS WELL AS MULTI-SECTOR INITIATIVES.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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 CONTINUES TO BE THE LEADING US MANUFACTURER OF COMMERCIAL AIRCRAFT.
POST TERRITORY MAJOR CENTRE FOR MARINE PURCHASES.
2. AGRI & FOOD PRODUCTS & SERVICE
HUGE MARKET FOR HORTICULTURAL PRODUCTS.
NATURAL EXTENSION OF WESTERN CANADIAN MARKETS.
GOOD NICHE MARKET FOR CANADIAN PRODUCTS.
3. CONSUMER PRODUCTS & SERVICES
GOOD TEST MARKET AND ENTRY POINT.
LIFESTYLES AND DEMANDS SIMILAR TO WESTERN CANADA.
STRONG CONSUMER DEMAND FOR NICHE PRODUCTS.
4. CONSTRUCTION INDUSTRY
AFFLUENT ENVIRONMENT. STRONG RESIDENTIAL AND SERVICES GROWTH.
AMONG TOP 10 CONSTRUCTION STARTS IN USA.
GROWTH ECONOMY COMMERCIAL AND RETAIL EXPANSION.
5. ADVANCED TECH. PROD. & SERV
EXCELLENT HI-TECH INDUSTRY IN SEATTLE PORTLAND.
SOLID POTENTIAL FOR NICHE PRODUCTS.
IMPORTANT TEST MARKET - NEW PRODUCTS.
6. FOREST PRODUCTS,EQUIP,SERVICES
TRADITIONAL EXTENSION OF WESTERN CANADA MARKET.
GROWING CONSTRUCTION INDUSTRY.
DIMINISHING REGIONAL RESOURCES.

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

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

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: SEATTLE

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	19950.00 \$M	21223.00 \$M	22280.00 \$M	23000.00 \$M
Canadian Exports	222.00 \$M	235.00 \$M	248.00 \$M	257.00 \$M
Canadian Share of Market	1.10 %	1.10 %	1.10 %	1.10 %

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	1.11 %
JAPAN	0.23 %
NEW ZEALAND	0.19 %
THAILAND	0.16 %
FRANCE	0.12 %

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

Products/services for which there are good market prospects:

1. GOURMET & SPECIALTY FOODS
2. MEAT & MEAT BI-PRODUCTS
3. FRESH & FROZEN FISH

Factors contributing to current successful Canadian exports:

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

Factors for Canadian exports not reaching market potential:

- Non-competitive pricing
- Lack of promotion and advertising

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: 40 NEW COMPANIES
60 EXHIBITORS 20 NEW DISTRIBUTOR APP'TS.

Activity: SPECIALTY FOOD NEBS - DEC '88

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

Activity: SOLO FOOD SHOW FEB - MAR '90
Expected Results: 60 EXHIBITORS; 20 NEW DIST. APPOINTMENTS; 40 NEW CO'S

Activity: FLORICULTURE NEBS - AUG '89
Expected Results: 20 PARTICIPANTS; 5 NEW DISTRIBUTOR APPOINTMENTS.

Activity: SPECIALTY FOOD NEBS - SEPT '89
Expected Results: 30 PARTICIPANTS; 10 COMPANIES.

Activity: CANADIAN WINE FAMILIARIZATION TASTING
Expected Results: 100 INDUSTRY, MEDIA & ENOLOGICAL ASSOCIATION CONTACT ATTENDEES.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	0.00 \$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 %
JAPAN	30.00 %
EUROPEAN COMMON MARKET C	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. NAVIGATION EQUIPMENT
2. TELECOMMUNICATIONS
3. ELECTRONICS
4. INTEGRATED CIRCUITS
5. COMPUTER SYSTEMS
6. COMPUTER PERIPHERALS
7. 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
- QUALITY PRODUCT DELIVERED
- ON TIME AT THE AGREED
- UPON PRICE.

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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
- Unsuitable product
- Limited appreciation/understanding of distribution system
- Limited Canadian capabilities
- Market prospects have not been adequately explored
- LACK OF PROFESSIONAL FOLLOW UP.

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

Activity: NORTHCON 89
Expected Results: ASSIST 18 CDN ELECTRONIC FIRMS TO GET SALES IN THE PACIFIC NORTHWEST.

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 CDN ELECTRONIC COMPUTER & SOFTWARE
Expected Results: TO OBTAIN FURTHER WORK FOR CANADIAN HIGH TECH COMPANIES.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	12002.00 \$M	1294.00 \$M	1393.00 \$M	1500.00 \$M
Canadian Exports	45.02 \$M	50.20 \$M	55.78 \$M	65.75 \$M
Canadian Share of Market	3.75 %	3.88 %	4.00 %	4.38 %

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 ELECTRONIC DIAGNOSIS EQUIPMENT
4. SEAT COVERS
5. GAS SHOCKS
6. GAS STRUTS
7. VIDEO TRAINING
8. ANY "OFF-ROAD" ACCESSORIES (4X4)
9. ANY PICK-UP TRUCK ACCESSORIES
10. MINI-VAN ACCESSORIES
11. APPEARANCE PRODUCTS (WAXES COLORS)

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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: PROPOSED SOLO AUTOMOTIVE TRADE SHOW MARCH 21, 1988
Expected Results: MINIMUM 30 COMPANIES WITH \$100,000 U.S. SALES.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	5540.00 \$M	6160.00 \$M	6840.00 \$M	7580.00 \$M
Canadian Exports	11.20 \$M	12.20 \$M	14.50 \$M	16.00 \$M
Canadian Share of Market	2.00 %	1.98 %	2.11 %	2.11 %

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 %
WEST 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
- Import duties are low
- Aggressive marketing
- Trade Fair activity
- Competitive pricing
- Strong sectoral capability in Canada

Factors for Canadian exports not reaching market potential:

- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- JONES ACT RETARDS COMM BOAT SALES
- IN REC MARINE LACK OF INTEREST

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: SEATTLE

Market: UNITED STATES OF AMERICA

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

Activity: PACIFIC MARINE EXPO/FISH EXPO INFO BOOTHS
Expected Results: INCREASE AWARENESS.

Activity: MISSION TO VANCOUVER BOAT SHOW
Expected Results: \$ 30 - 75,000 SALES

Activity: MISSION TO TORONTO BOAT SHOW
Expected Results: \$ 50 - 100,000 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: 1989 FISH EXPO NATIONAL SECTION
Expected Results: \$ 1-3 MILLION SALES.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	4080.00 \$M	4400.00 \$M	6500.00 \$M	7000.00 \$M
Canadian Exports	204.00 \$M	220.00 \$M	325.00 \$M	350.00 \$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	85.00 %
EUROPEAN COMMON MARKET C	8.00 %
JAPAN	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. AIRCRAFT PARTS
2. AIRCRAFT SYSTEMS
3. AVONICS
4. ELECTRONICS
5. COMPUTERS

Factors contributing to current successful Canadian exports:

- Import restrictions are not a significant impediment in this sector
- Aggressive marketing
- Provincial export promotion
- Competitive pricing
- Willingness of exporters to invest/joint venture in territory
- QUALITY PRODUCT DELIVERED
- ON TIME AT AGREED PRICE.

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RPTCL

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
- 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: ONTARIO AEROSPACE MISSION, JUNE 89
Expected Results: 4 ONTARIO COMPANIES BCA QUALIFIED.

Activity: BOEING PERMANENT PROCUREMENT PROGRAM, FEB 90
Expected Results: NEW CONTRACTS WORTH \$ 1 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: WORKING INDIVIDUALLY WITH CANADIAN AEROSPACE COMPANIES
Expected Results: TO GET COMPANY BCA QUALIFIED AND WORK

Activity: SELECTIVE PROVINCIAL MISSIONS TO BOEING
Expected Results: EXPAND CANADA'S SUPPLIER BASE TO BOEING.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	12162.80 \$M	14900.40 \$M	13353.60 \$M	14545.50 \$M
Canadian Exports	82.00 \$M	88.80 \$M	80.50 \$M	90.90 \$M
Canadian Share of Market	0.67 %	0.60 %	0.60 %	0.62 %

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 & HOUSEHOLD (IE GIFTS)
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

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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
- PACIFIC NW IS A RELATIVELY SMALL
- REG MKT & IS OFTEN THE LAST POINT

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

Activity: IN-COMING BUYERS TO TORONTO FOOTWEAR SHOW - JAN '89
Expected Results: 12 MO. SALES \$ 100,000.00

Activity: SPRING SEATTLE SPORTING GOODS SHOW - OCTOBER '89
Expected Results: 15 PARTICIPANTS; \$ 50,000.00 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: FACILITIES MANAGEMENT SHOW & CONVENTION, SEATTLE FALL '89
Expected Results: 5 NEW CANADIAN COMPANIES TO PARTICIPATE.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	2845.00 \$M	3165.00 \$M	3521.00 \$M	3917.00 \$M
Canadian Exports	140.00 \$M	150.00 \$M	161.00 \$M	173.10 \$M
Canadian Share of Market	4.92 %	4.74 %	4.57 %	4.92 %

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 %
TAIWAN	3.00 %
CANADA	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. COLD WEATHER TECHNOLOGY
2. PROTECTIVE COATINGS
3. HAND TOOLS
4. ALTERNATIVE LUMBER PRODUCTS
5. WALL COVERINGS
6. PLUMBING PRODUCTS
7. TREATED LUMBER PRODUCTS
8. DECOR PRODUCTS OR CENTERS

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

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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

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

Activity: SUPPORT CANADIAN PARTICIPATION IN WASHINGTON BLDG MAT SHOW
Expected Results: GAIN NEW MARKET SHARES AND SALES TO NEW ACCOUNTS.

Activity: ENCOURAGE CDN SUPPLIERS TO PARTIC IN OUR LOCAL HOME SHOWS
Expected Results: GAIN NEW MARKET SHARES AND SALES TO NEW ACCOUNTS.

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

Activity: MAJOR 1989 SOLO CDN BLDG MAT SHOW WILL BE PROP'D FOR 89/90
Expected Results: 40 TO 50 CANADIAN COMPANIES TO INTRODUCE THEMSELVES TO THE U.S. MARKET AND GENERATE \$500 PLUS IN SALES.

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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
Current year	1000.00	35.00	50.00
One year ago	1100.00	36.00	50.00
Two years ago	1100.00	37.00	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:

IF FTA IS IMPLEMENTED IN 1989, INVESTMENT COULD TOP \$ 1 BILLION.

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

- OTHER AREAS OF USA
- UK
- 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
- MEETINGS WITH CHAMBERS OF COMMERCE AND ECONOMIC DEVELOPMENT ASSOCIATIONS THROUGHOUT TERRITORY.
- VIP VISITS TO STATE GOVERNORS.
- UNIVERSITY SPEAKING ENGAGEMENTS.

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: SEATTLE

Country: UNITED STATES OF AMERICA

Compared to major competitive destinations, Canada is perceived to have

the following advantages:

- PROXIMITY
- EXCHANGE RATES
- FTA (IF IMPLEMENTED)

the following constraints:

- GOVERNMENT CONTROLS
- HIGHER SALARY/WAGE BASE
- WEATHER

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

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

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

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TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: SEATTLE

Country: UNITED STATES OF AMERICA

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

Date

Type: SEMINAR, ABROAD

SERIES OF SEMINARS WITH FINANCIAL AND BUSINESS LEADERS.

0/89

Location: SEATTLE PORTLAND

Invest Nature: JOINT VENTURE

PORTFOLIO

TECHN LICENSING

Sector: MULTIPLE SECTORS

Cooperants: CANADIAN BANKS PROVINCES

Estimated Budget: \$10,000.00

Type: OTHER PROMOTION

MEDIA ADVERTISING

0/89

Location: POST TERRITORY

Invest Nature: JOINT VENTURE

PORTFOLIO

TECHN LICENSING

Sector: MULTIPLE SECTORS

Cooperants: PROVINCES

Estimated Budget: \$100,000.00

Total estimated budget for all proposals: \$110,000.00

Post : SEATTLE

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Post/Contact</u>
90/02/21	SOLO FOOD SHOW, SEATTLE FAIR, SOLO	AGRI & FOOD PRODUCTS & SERVICE

RPTBL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: WASHINGTON

Country: UNITED STATES OF AMERICA

DEFENCE PROGRAMS: EMBASSY'S ACTIVE PROGRAM OF MONITORING AND LOBBYING AGAINST PROTECTIONIST US DEFENCE TRADE LEGISLATION LED TO SEVERAL SIGNIFICANT SUCCESSSES IN 1988. MOST IMPORTANT OF THESE WAS LEGISLATIVE RECOGNITION OF CANADIAN COMPANIES (FOR FIRST TIME) AS DOMESTIC FOR CERTAIN US INDUSTRIAL BASE PURPOSES. YEAR ALSO SAW ACTIVE PROGRAM TRADE PROMOTION INCLUDING PARTICIPATION IN NEW TRADE FAIRS (ROA, MARINE CORPS SHOW, COMDEF '88), SOLO COMPANY MARKETING PRESENTATIONS AT EMBASSY; CREATION AND STAFFING OF NEW DOSA WORKING GROUPS; SERIES OF ACTIVITIES RE FTA; MAJOR NAIDBO WORKSHOPS; AND SUCCESSFUL LOBBYING OF CONGRESS AND DOD IN SUPPORT OF MAJOR CANADIAN SALES EFFORTS (FAADS, LAV, CL 227, IRSTD, DIEMACO, ETC). EMBASSY'S WORK IN SUPPORT OF CANADIAN EXPDRT CONTROLS INTERESTS MONITORING AND REPORTING ON LEGISLATIVE AND REGULATORY DEVELOPMENTS, REPRESENTING NATIONAL AND INDIVIDUAL COMPANIES INTERESTS, CONTINUED TO GROW. EMBASSY ALSO COMBATTED OTHER RESTRICTIONS ON CANADIAN ACCESS TO US DEFENCE MARKET AND TECHNOLOGY SUCH AS NOFORN RESTRICTIONS ON MEETINGS AND BID PACKAGES, ETC.

THERE WILL BE INCREASED REQUIREMENTS FOR MONITORING AND LOBBYING ON CONGRESSIONAL AND DOD ACTIVITIES IN 1989 REFLECTING (A) OPPORTUNITIES TO CAPITALIZE ON THE FTA AND 1988 SUCCESSSES AND (B) NEW DEMANDS/CHALLENGES (STAFF CHANGE-OVERS FOLLOWING THE ELECTIONS, NEW INITIATIVES OF THE BUSH ADMINISTRATION, SUCH AS EFFORTS TO RESOLVE THE BUDGETARY DEFICIT AND DETERIORATING DEFENCE INDUSTRIAL BASE AND CONTINUING PROTECTIONIST PRESSURES FROM THE RE-ELECTED DEMOCRATIC CONGRESS-HEINZ/DAKAR BILLS/ETC). TECHNOLOGY TRANSFER ISSUES AND NEW EXPORT LEGISLATION ARE ALSO LIKELY TO BE A MAJOR FOCUS OF ATTENTION. BUDGET RESTRAINTS LEADING TO THE CANCELLATION AND DEFERMENT OF IMPORTANT CAPITAL PROJECTS WILL ALSO LIKELY CREATE DEMANDS FOR INCREASED HIGH LEVEL LBBYING. SUBJECT TO RESOURCE AVAILABILITY, EMBASSY ALSO PLANS TO INCREASE DEFENCE MARKETING ACTIVITIES (INCLUDING SOLO COMPANY PRESENTATIONS) TO TAKE ADVANTAGE OF FTA AND NEW CHANCERY FACILITIES.

THE ACTIVITIES OF THE DOSA WORKING GROUPS WILL TAKE AN INCREASING SHARE OF EMBASSY RESOURCES BUT SHOULD START PAYING OFF IN TERMS OF INCREASED PROJECTS.

GOVT PROCUREMENT/MARKET ACCESS: 1988 BROUGHT HEIGHTENED AWARENESS OF AND INTEREST IN US MARKETS, DESPITE STRENGTHENING OF CANADIAN DOLLAR, RESULTING IN INCREASED VOLUME OF REQUESTS FOR ASSISTANCE WITH MARKET OPPORTUNITIES AND REGULATORY MATTERS IN BOTH US FEDERAL GOVERNMENT (\$200B MARKET) AND PRIVATE SECTOR. EXPECT THIS TO CONTINUE AS FTA AND JAN 1/89 US MOVE TO HARMONIZED SYSTEM WILL INCREASE LOAD. US GOVERNMENT EMPHASIS ON HOLDING DOWN GOVERNMENT SPENDING MAY LEAD TO INCREASED OPPORTUNITIES FOR CANADIAN INFORMATICS/COMMUNICATIONS FIRMS AND OTHERS OFFERING PRODUCTS/SERVICES DESIGNED TO INCREASE PRODUCTIVITY.

COMMERCIAL TIO: WITH EMBASSY'S NEW TIO OFFICE NOW WELL ESTABLISHED, TRADE PROMOTION IN THE MID-ATLANTIC STATE REGION BECAME FULLY PROACTIVE IN 1988. OVER 50 EVENTS WERE MANAGED IN A WIDE VARIETY OF SECTORS; THIS REFLECTED

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RPTB1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 TRADE AND ECONOMIC OVERVIEW

Mission: WASHINGTON

Country: UNITED STATES OF AMERICA

THE TERRITORY'S DIVERSITY AND IMPORT POTENTIAL, IN PARTICULAR THE BALTIMORE-WASHINGTON "COMMON MARKET" (4TH LARGEST REGIONAL MARKET AND HIGHEST PER CAPITA INCOME IN THE NATION) AND GREATER PHILADELPHIA, 5TH LARGEST CITY IN THE US AND CENTRE FOR HEALTH CARE, HIGH TECH, FINANCIAL MANUFACTURING ACTIVITY, REGION AS A WHOLE WILL CONTINUE TO ENJOY A BUOYANT BUSINESS CLIMATE IN FY 89/90. SECTORS WITH A SIGNIFICANT POTENTIAL FOR CDN SUPPLIERS INCLUDE FOOD AND CONSUMER PRODUCTS, COMMUNICATION/INFORMATICS EQUIPMENT AND SERVICES, AND URBAN TRANSPORTATION.

RPTB2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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
HUGE DEFENCE MKT (\$250 BILLION); SPECIAL CDN ACCESS TO SIGNIFICANT PORTION OF THIS THROUGH DDSA/DPSA NADIBO; NEW DEFENCE INITIATIVES (ADI, SPACE-BASED RADAR, FAADS ETC); NATO COOPERATIVE PROGRAMS; OOD'S DEMAND FOR COMPETITIVE SOURCING
2. ADVANCED TECH. PROD. & SERV
TERRITORY'S CONCENTRATION OF HI-TECH INDUSTRY OFFERS RICH MKT FOR SOFTWARE/SYSTEMS, COMPUTER PERIPHERALS, SECURITY APPARATUS, ETC.; US GOVT IS AUTOMATING ITS OPERATIONS CREATING HUGE DEMAND FOR COMMUNICATIONS, INFORMATICS, ELECTRONIC RELATED PRODUCTS.
3. CONSUMER PRODUCTS & SERVICES
TERRITORY REPRESENTS MKT OF OVER 20 MILLION CONSUMERS, INCL GREATER WSHDC AREA (HIGHEST DISPOSABLE INCOME LEVEL IN US); CDN COMPANIES HAVE STRONG COMPETITIVE CAPABILITIES IN CERTAIN MARKET NICHES (EG., CONTRACT FURNITURE, FASHION APPAREL ETC).
4. AGRI & FOOD PRODUCTS & SERVICE
AFFLUENT MARKET AREA (3 ABOVE)
PENNSYLVANIA, VIRGINIA HAVE DOMINANT AGRICULTURAL SECTORS
MANY PROMOTIONAL VEHICLES OFFER OPPORTUNITIES FOR MAXIMUM PRODUCT EXPOSURE.
5. CONSTRUCTION INDUSTRY
- AFFLUENT MARKET AREA (3 ABOVE)
- MANY PROMOTIONAL VEHICLES AVAILABLE.

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

- | | |
|-------------------------------------|-------------------------------------|
| 1. DEFENCE PROGRAMS, PRODUCTS, SERV | 4. FOREST PRODUCTS, EQUIP, SERVICES |
| 2. ADVANCED TECH. PROD. & SERV | |
| 3. CONSUMER PRODUCTS & SERVICES | |

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	7567.00 \$M	7718.00 \$M	7873.00 \$M	8030.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	248.00 \$M	250.00 \$M
Canadian Share of Market	3.30 %	3.10 %	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	83.00 %
CANADA	3.00 %
MEXICO	1.50 %
BRAZIL	1.50 %
PHILIPPINES	0.05 %
FRANCE	0.05 %

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. SPECIALTY/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

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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

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

Activity: RESTAURANT/HOSP FOODSERVICE SHOW MAR 5-7/89 WASH D.C.
Expected Results: INCREASED SALES/DISTRIBUTION IN POST TERRITORY FOR CDN 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: EXPAND DIST/BROKER NETWORK & QUALIFY DIST INT IN CDN FOOD/BEV
Expected Results: PROVIDING CDN COMP WITH INCREASINGLY RELIABLE CONTACT BASE FOR DISTRIBUTION IN TERRITORY.

Activity: WINE TASTING FOR LOCAL DIST/IMPORTERS, RETAILERS.
Expected Results: INCREASE POTENTIAL FOR DISTRIBUTION OF SALES IN LUCRATIVE WASHINGTON MARKET PLACE.

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	956.00 \$M	892.00 \$M	918.00 \$M	945.00 \$M
Canadian Exports	44.00 \$M	60.00 \$M	61.00 \$M	63.00 \$M
Canadian Share of Market	4.60 %	6.70 %	6.60 %	6.60 %

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 EQUIPMENT
4. BAILERS
5. FENCING

Factors contributing to current successful Canadian exports:

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

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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
- 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: DEVELOP & INCREASE DATA BASE FOR AGENTS/DISTRIBUTORS
Expected Results: ENHANCED MARKET PENETRATION

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

Activity: AG PROGRESS DAYS, AUGUST 89
Expected Results: CDN PAVILION/MAJOR PROMOTION

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

Activity: INCREASED TRADE SHOW ATTENDANCE
Expected Results: TO GENERATE MORE EFFECTIVE BUYING CONNECTIONS

Activity: VISIT PROGRAM TARGETTED AT DISTRIBUTORS

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: WASHINGTON

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	20000.00 \$M	23400.00 \$M	20800.00 \$M	22000.00 \$M
Canadian Exports	100.00 \$M	128.00 \$M	114.00 \$M	150.00 \$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
FRANCE

97.00 %
1.00 %

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

Products/services for which there are good market prospects:

1. ELECTRONICS ASSEMBLIES
2. MACHINING PARTS
3. CASTINGS
4. ELECTRICAL WIRING
5. AIRCRAFT COMPONENTS
6. SHIPS COMPONENTS

Factors contributing to current successful Canadian exports:

- Aggressive marketing
- Provincial export promotion
- Competitive pricing
- Bilateral economic trade agreement

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
- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- Limited Canadian capabilities
- BUY AMERICAN NAT'L
- SECURITY.

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

Activity: MARINE SECTOR MARKETING IN CONJUNCTION WITH SPCC & CMIA
Expected Results: INCREASE CDN SHARE ON SPCC MARKET \$2 MILLION

Activity: DEVELOPMENT OF PRIME CONTRACTOR REQUIREMENT DATA BASE.
Expected Results: PROVIDE 100 NEW OPPORTUNITIES TO QUOTE

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

Activity: SPCC COMPETITION FAIR
Expected Results: 15 CDN CORP ON SPCC BIDDERS MAILING LIST

Activity: PRIME CONTRACTORS VENDOR SHOW
Expected Results: INTRODUCTION OF 50 CDN COMPANY TO REGIONAL PRIME CONTRACTORS

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

Activity: DEVELOPMENT & UPDATING OF PRIME CONTRACTORS DATA BASE
Expected Results: FOLLOW UP OF OPPORTUNITIES & ACHIEVE 20 NEW BUYING CONNECTIONS.

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: WASHINGTON

Market: UNITED STATES OF AMERICA

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

USW "BREAKOUT" PROGRAM

Approximate Value: 1000 M\$
Financing Source : DOM - Domestically funded
Contact : JAMES J. GANDERTON

BOEING V - 22

Approximate Value: 35000 M\$
Financing Source : DOM - Domestically funded
Contact : JAMES J.. GANDERTON

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: WASHINGTON

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	295000.00 \$M	265000.00 \$M	250000.00 \$M	250000.00 \$M
Canadian Exports	0.80 \$M	1.20 \$M	1.40 \$M	1.40 \$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	98.00 %
UNITED KINGDOM	1.00 %
GERMANY WEST	1.00 %
FRANCE	1.00 %
ITALY	1.00 %
BELGIUM	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. PARTS/COMPONENTS
2. PRECISION MACHINING
3. SUBSYSTEMS/COMPONENTS ELECTRONICS/ELECTRICAL
4. AEROSPACE PRODUCTS
5. MARINE SUBSYSTEMS
6. TRAINING EQUIPMENT
7. LIGHT ARMoured VEHICLES
8. RPVS

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

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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:

- Import restrictions are a significant impediment in this sector
- Restrictive standards
- Non-competitive pricing
- Lack of promotion and advertising
- Limited appreciation/understanding of distribution system
- Limited Canadian capabilities
- BUY AMER LEG/FOR DIS
- /ACQ REGS/LACK OFUS

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

- Activity: MONITOR,REPORT&LOBBY AGAINST PROT LEG&PROPOSED CHANGES IN
- Activity: LOBBY SEN US OFF TO ASS IN THE MARK OF CON DEF PROD IN USA
- Activity: MONITOR&REPORT ON CHANGES IN US EXP CONT/TECH TRANS REGULAT
- Activity: ASSIST CDN EXPORTERS TO MKT THEIR PROD TO DOD BY ARR.MKTG

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

- Activity: INCR NUM OF SOLD CO MKTG PRESENT IN NEW EMBASSY.[SUBJ AVAIL]
- Expected Results: INTRODUCTION OF 15 TO 20 NEW COMPANIES PRODUCTS TO MARKET

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: WASHINGTON

Market: UNITED STATES OF AMERICA

Sector : ADVANCED TECH. PRODD. & SERV

Sub-Sector: COMPUTERS HARD/SOFTWARE & COMP

Market Data	2 Years Ago	1 Year Ago	Current Year (Estimated)	Next Year (Projected)
Market Size	5964.00 \$M	6485.00 \$M	7259.00 \$M	7985.00 \$M
Canadian Exports	84.00 \$M	120.00 \$M	132.00 \$M	145.00 \$M
Canadian Share of Market	1.40 %	1.90 %	1.80 %	1.80 %

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

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: WASHINGTON

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: POST TO UPDATE&DEVELOP ITS DATA BASE ON POTENTIAL AGENTS,
Expected Results: A BETTER REFERRAL SERVICE TO CDN MANUFACTURERS

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 & SUPPORT BUYING/SELLING MISSIONS TO CDN & US.
Expected Results: IMPROVE KNOWLEDGE OF CDN MFG CAPABILITIES/INCREASE MKT SHARE

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 SECTOR/SUB-SECTOR HIGHLIGHTS

Mission: WASHINGTON

Market: UNITED STATES OF AMERICA

Sector : ADVANCED TECH. PRDD. & SERV

Sub-Sector: INSTRUMENTA & PROCESS CONTROLS

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 %
GERMANY WEST	0.00 %
JAPAN	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. ELECTRONIC MEASURING INSTRUMENTATION
2. METEOROLOGICAL INSTRUMENTS
3. HAZARD DETECTING INSTRUMENTS
4. ENVIRONMENTAL POLLUTION INSTRUMENTATION
5. OTHER SCIENTIFIC INSTRUMENTATION

Factors contributing to current successful Canadian exports:

- Import duties are low
- Aggressive marketing
- PEMD support
- Strong sectoral capability in Canada
- Willingness of exporters to invest/joint venture in territory
- DOGGED PERSIST&WILL
- TO INVEST TIME&RESOURCES
- FOR SEV YRS BEFORE INI SA

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
- 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
- BUY AMERICAN ACT
- PROTECTIONISM
- BUY AMER&NAT SEC RESTRICT; NEED TO
- LEARN MKT STRAT CRITICAL TO THIS MK

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

Activity: CONSULTATIONS WITH INDIVIDUAL COMPANIES
Expected Results: 5 NEW FIRMS COMMITTED TO MARKETING

Activity: EMB.-SPONSORED CO PRESENTA'NS TO US GOVT PROSPECTIVE BUYERS
Expected Results: TOTAL \$1 MILLION PROJECTED EXPORTS

Activity: MONITORING/LOBBYING US GOVT PROCUREMENT POLICIES&PROCEDURES
Expected Results: CDN GOVT & INDUSTRY AWARE OF MARKET ENVIRONMENT & NOT ADVERSELY AFFECTED BY PROTECTIONIST MEASURES.

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

Activity: MARKET STUDY OF OPPORTUNITIES IN NASA, USGS, EPA
Expected Results: ACCURATE DETAILED MARKET INFO TO CDN INDUSTRY

Activity: PUBLICA'N ADVIS.CDN FIRMS OF MKTG STRAT IN US FED GOVT MKT.
Expected Results: 30 FIRMS TO CONSIDER MARKETING TO US FEDERAL GOVT

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: WASHINGTON

Market: UNITED STATES OF AMERICA

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

SPACE STATION

Approximate Value: 10000 M\$
Financing Source : DOM - Domestically funded
Contact : JUDY BRADT EMBASSY
202-483-5505

GSA ADP SCHEDULE CONTRACTS

Approximate Value: 500 M\$
Financing Source : DOM - Domestically funded
Contact : JUDY BRADT EMBASSY
202-483-5505

LANDSAT SATELLITE

Approximate Value: 500 M\$
Financing Source : DOM - Domestically funded
Contact : JUDY BRADT EMBASSY
202-483-5505

RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	9017.00 \$M	9794.00 \$M	10284.00 \$M	10798.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.00 \$M	16.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	0.02 %

Major Competing Countries

Market Share

UNITED STATES OF AMERICA	73.00 %
HONG KONG	4.00 %
TAIWAN	0.00 %
KOREA	3.00 %
PEOPLE'S REP OF CHINA	2.00 %
ITALY	1.00 %

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

Products/services for which there are good market prospects:

1. OUTERWEAR
2. OUTDOOR JACKETS
3. 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
- 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
- Limited Canadian capabilities

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RPTC1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

Mission: WASHINGTON

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 TERR RETAIL/BUY TO DETERMINE MKT POTENTIAL FOR CDN
Expected Results: ASSIST CDN MFRS TO PENETRATE MARKET THROUGH QUALIFIED CONTACTS.

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

Activity: TORONTO FESTIVAL OF FASHION
Expected Results: INCREASED SALES

Activity: MONTREAL PRET
Expected Results: INCREASED SALES

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

Activity: MAJOR PROMO'N (FASH.SHOW) & SHOWROOM FOR TERR. RETAIL/BUYERS
Expected Results: PROMOTE & SHOWCASE CDN DESIGNERS TO INCREASE EXPORT SALES, BUYER AWARENESS.

RPTCL

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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	2372.00 \$M	2567.00 \$M	2593.00 \$M	2619.00 \$M
Canadian Exports	0.00 \$M	0.00 \$M	0.00 \$M	73.00 \$M
Canadian Share of Market	0.00 %	0.00 %	0.00 %	2.80 %

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

Major Competing Countries	Market Share
UNITED STATES OF AMERICA	69.00 %
TAIWAN	6.00 %
CANADA	3.00 %
ITALY	2.00 %
GERMANY WEST	1.00 %
DENMARK	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. WOODEN HOUSEHOLD FURNITURE
3. UPHOLSTERED 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
- Canada is one of few sources of supply
- Bilateral economic trade agreement

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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:

- 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: ESTABLISH DATABASE OF FURN REPS QUALIFIED TO HANDLE CDN LINE
Expected Results: INCREASE NUMBER OF REPS IN TERRITORY ABLE TO PROMOTE PRODUCT & GEN

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

Activity: MONTREAL FURNITURE MARKET - 89
Expected Results: INCREASED DISTRIBUTION AND SALES

Activity: IIDEX NOV 89
Expected Results: INCREASED DISTRIBUTION AND SALES

Activity: TORONTO FURNITURE MARKET JAN 90
Expected Results: INCREASED DISTRIBUTION AND 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: INDUSTRY PRESENTATIONS/SEMINARS TO TERRITORY BUYERS
Expected Results: INCREASED AWARENESS OF CDN PRODUCT, INCREASED DISTRIBUTION AND SALES.

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RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 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:

WITH FTA ASSURED, SIGNIFICANT INCREASE IN MID ATLANTIC STATE INVESTMENT CAN BE ANTICIPATED - 45th FORTUNE 500th CO. HEADQUARTERED IN TERRITORY WILL BE FOCUSING ON (NEW) INVESTMENT STRATEGIES

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

- FRANCE
- JAPAN
- NETHERLANDS
- BELGIUM
- MID EAST
- PUERTO RICO

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

- PASSIVE PROMOTION (INVESTMENTS DECISIONS RESULTING FM INTERCORPORATE LINKS OR FROM IN HOUSE DETERMINATION BASED ON EC FACTORS, EG., LOW WAGE RATES IN PUERTO RICO)
- ID PROMOTION AS A COMPONENT OF GENL BUYING MISSIONS, ESP. THOSE FROM FAR EAST COUNTRIES

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

- CORPORATE LINKS ALREADY ESTABLISHED
- ECONOMIC/POLITICAL STABILITY/PREDICTABILITY
- PROXIMITY TO RAW/INTERMEDIATE GOOD INPUTS
- QUALITY OF AVAILABLE LABOUR FORCE

RPTD1

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROMOTION PROFILE

Mission: WASHINGTON

Country: UNITED STATES OF AMERICA

the following constraints:

- LACK OF AWARENESS OF CDA AS INVESTMENT LOCATION [AMONG SME
- LACK OF AWARENESS OF CDA AS INVESTMENT LOCATION [AMONG SME

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	HIGH
Strategic Partnering	HIGH
Technology Licensing	HIGH

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

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

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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: WASHINGTON

Country: UNITED STATES OF AMERICA

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

	Date
Type: SEMINAR, ABOARD	
DOING BUSINESS WITH/INVESTING IN CDN FUNCTION	11/89
Location: YORK, PA	
Invest Nature: VARIOUS	
Sector: MULTIPLE SECTORS	
Cooperants: LOCAL AUTHORITIES	
Estimated Budget: \$1,500.00	
DOING BUSINESS WITH/INVESTING IN CDA FUNCTION	5/89
Location: WILMINGTON, DE	
Invest Nature: VARIOUS	
Sector: MULTIPLE SECTORS	
Cooperants: LOCAL AUTHORITIES	
Estimated Budget: \$2,500.00	
Type: MISSION IN, TO INDUSTRY	
VENTURE CAPITALIST MISSION TO ONT, QUE	0/00
Location: FROM WSHDC	
Invest Nature: PORTFOLIO	
Sector: MULTIPLE SECTORS	
Cooperants: ONT HOUSE, QUE HOUSE NYC	
Estimated Budget: \$0.00	
DEPENDENT ON POLICY DECISION RE: POST TELEX TO TDS/UST #UNID	10/89
9246 27 OCT 88	
Location: TERRITORY TO S. ONT	
Invest Nature: JV, STRAT. PART	
-NER, TECH	
LICENSING	
Sector:	
Cooperants: OUTSIDE ORGANIZER	
Estimated Budget: \$0.00	
Type: DIRECT MAIL CAMPAIGN	
FOLLOW-UP TO FTA IMPLEMENTATION	0/00
Location: TERRITORY	
Invest Nature: VARIOUS	
Sector: MULTIPLE SECTORS	
Cooperants:	
Estimated Budget: \$0.00	

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RPTD2

TRADE AND INVESTMENT PROMOTION PLANNING SYSTEM

89/90 INVESTMENT PROGRAM ACTIVITIES IN MISSIONS ABROAD

Mission: WASHINGTON

Country: UNITED STATES OF AMERICA
Date

Type: OUTCALL PROGRAM

FORTUNE 500 CALLS VENTURE CAPITAL LIAISON

0/00

Location: PHIL./WSHDC/BALTIM.

Invest Nature: VARIOUS

Sector: MULTIPLE SECTORS

Cooperants:

Estimated Budget: \$0.00

Total estimated budget for all proposals: \$4,000.00

Post : WASHINGTON

<u>Start Date</u>	<u>Event Name, Location & Type</u>	<u>Sector/Post/Contact</u>
89/06/20	AFCEA - ARMED FORCES COMMUNICATIONS & ELECTRONICS ASSOC.- 89 FAIR, NATIONAL STAND	DEFENCE PROGRAMS, PRODUCTS, SERV G.GOLDHAWK
89/10/08	ASSOCIATION OF OLD CROWS (AOC)' 89, WASHINGTON, D.C. FAIR, NATIONAL STAND	ADVANCED TECH. PROD. & SERV GOLDHAWK