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CANADA'S EXPORT STRATEGY

The International Trade Business Plan

1995/96

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***An Integrated Plan for Trade, Investment
and Technology Development***

The International Trade Business Plan is made up of an **Overview** highlighting Canada's international business development priorities, and a series of **Industry Sector Strategies**, which include lists of planned international activities. The following documents are available:

- Overview
1. Advanced Manufacturing Technologies
 2. Agriculture and Food Products
 3. Aircraft and Parts
 4. Automotive
 5. Biotechnologies
 6. Business, Professional and Educational Services
 7. Chemicals, Plastics and Advanced Materials
 8. Construction Products
 9. Consumer Products
 - Apparel and Fur
 - Textiles
 - Footwear
 - Sporting Goods (including recreational watercraft)
 - Tools, Hardware and Housewares
 - Residential Furniture
 - Business and Institutional Furniture
 10. Cultural Industries
 11. Defence Products
 12. Environmental Equipment and Services
 13. Fish and Sea Products
 14. Forest Industries
 15. Information Technologies and Telecommunications
 - Sector Overview
 - Computers and Peripheral Equipment
 - Electronic Components
 - Geomatics
 - Instrumentation
 - Software Products and Computer Services
 - Telecommunications
 16. Medical and Health-Care Products and Services
 - Medical Devices
 - Pharmaceuticals
 - Health-Care Services
 17. Minerals and Metals
 18. Oil and Gas Products and Energy Equipment
 19. Power Equipment
 20. Primary/Secondary Industrial Machinery
 - Mining, Forestry, Pulp and Paper
 - Agricultural Technology, Machinery and Equipment
 - Ocean and Marine Shipboard Technology
 21. Rail and Bus Equipment
 22. Space
 23. Tourism

For information on how to receive the Overview, or additional Industry Sector Strategies, please call: **1-800-267-8376**

All monetary figures in this document are expressed in Canadian dollars unless otherwise indicated.

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Aussi disponible en français sous le titre Équipement et services de protection de l'environnement.



Environmental Equipment and Services

Canada's rapidly growing environmental sector provides a wide range of environmental conservation, pollution prevention, control, protection and enhancement products and services for governments, manufacturers, resource industries and others.

Canada continues to support international activities in this industry that are aimed at enlarging shares of established markets with innovative technologies and capabilities targeted at niche market opportunities, and pursuing opportunities with international financial and donor organizations in the developing world.

The recently announced "Strategy for the Canadian Environmental Industry" strengthens the existing approach with the following initiatives:

- International Environmental Technology: a program for market-entry adaptation and demonstration of Canadian technologies that meet the needs of developing economies;
- Environmental Conventions and Agreements: encourages Canadian private-sector participation in business opportunities;
- Strategic Alliances and Networks: packages more competitively the products and capabilities of small- and medium-sized enterprises (SMEs), for penetrating markets;
- Environmental Market Intelligence: gathers, shares and develops strategic information with studies, workshops and market training;
- International Environmental Management: transfers Canadian public- and private-sector expertise to developing economies.

International Environment

The world market for environmental products and services is expected to grow from US\$288 billion in 1993 to US\$391 billion by 1998 (*Environmental Business Journal*, 1994). Organization for Economic Co-operation and Development (OECD) countries dominate the sector, with

some 80 percent of the world market. Typically, environmental products and services account for 1 percent to 1.5 percent of the gross domestic product (GDP) for most OECD countries. However, many developing countries are rapidly accelerating their environmental agenda for reasons of economic sustainability, security and access to the world trading system.

Market forecasts call for an average annual growth rate of 7 percent over the next few years. Many firms report aiming some 50 percent of their international marketing efforts at the United States, 20 percent at the Pacific Rim, 18 percent at Western Europe and about 12 percent elsewhere. These targets are already changing as Canadian firms intensify sales efforts in Mexico, Latin America and the Pacific Rim. Average annual growth rates are shown in Figure 1.

Market priorities in the U.S. include integrated waste management, the management of hazardous waste and air pollution controls. Although most exports to the U.S. are manufactured products, Canadian firms are now pursuing services opportunities, such as contaminated site remediation. Many firms are positioning themselves to take advantage of 370 million consumers under the North American Free Trade Agreement (NAFTA) for new opportunities in trade, investment and technology development. This strategy has already delivered a first three-country air pollution control industry conference and trade show, mounted by Canada. As well, this new southern-focussed strategy has begun delivering trade and partnering initiatives in Mexico, Costa Rica, Chile, Brazil and Argentina.

Many of Canada's missions abroad place environment within the top three priority industrial sectors. Booming Asian growth in China, South

Korea, Taiwan and the Association of Southeast Asian Nations (ASEAN) has been attracting many Canadian firms.

In the European Union marketplace, a common body of environmental directives and standards is expected to simplify marketing. This may result in more concerted marketing to countries such as Germany and France, as well as to others such as Portugal, Spain and Greece, which are playing "environmental catch-up." For Eastern Europe, Canada will continue building trade and partnering with initiatives in Poland and the Czech Republic.

Many developing countries still need support from international financial institutions (IFIs) and regional development banks. Strategic environmental planning and institution-building initiatives are provided by the Canadian International Development Agency (CIDA). Capacity-building technical linkages are provided by Environment Canada (EC) research institutes. These sorts of initiatives serve as a basis for follow-up industry activity.

Canada is a significant financial contributor to the World Bank and all regional development banks. As a result, Canadian companies are eligible to bid on over \$40 billion in projects funded annually in developing countries by these institutions. The vast majority of these contracts, which are all dominated by hard currencies, are awarded under a transparent system of international competitive tendering.

All IFIs are continuing to increase their commitment to environmental projects. The World Bank lent US\$2 billion in 1993, and the Asian Development Bank designated US\$154 million for baseline studies, water supply projects, training and characterization of Viet Nam's environmental situation.

Inter-American Development Bank financing for environmental projects reached US\$1.2 billion for 71 projects in 1993. This represents a significant increase in the bank's lending activities since 1990, when it funded US\$488 million for 28 projects. In addition to environmental

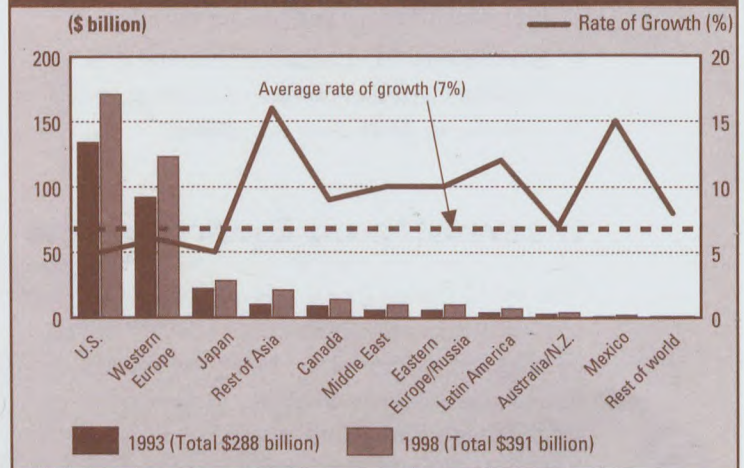
projects, significant environmental components are included in projects for other sectors, estimated at about US\$1 billion during 1990-1993. The bank has also been instrumental in mobilizing additional funds of some US\$1.5 billion for 1993. To date, the bank's projects have focussed on natural resource conservation, improvement of the urban environment, pollution control and local government institutional strengthening.

Other sources of funding include the United Nations Environment Program (UNEP), the World Bank's Global Environment Trust Fund (GEF), the multilateral fund under the Montréal Protocol for the Protection of the Ozone Layer, and CIDA. For new exporters, accessing these and more conventional sources of financing demands knowledgeable and effective marketing.

Awareness of the factors shaping international markets is critical.

- Fundamentally, the market for environmental products and services is driven by public demands that political leaders take environmental considerations seriously and resolve environmental problems through laws, regulations and funding.

Figure 1 — Revenues of Global Environmental Industry (US\$)



Source: Environmental Business Journal, 1994

- Those environmental considerations drive the market and help develop the domestic industry and make it more competitive. However, they also serve as non-tariff trade barriers, and can keep out products or processes from countries that are perceived as having less stringent environmental standards.
- Over the long term, all industry sectors will be required to take a more integrated and comprehensive approach, to develop and follow more acceptable standards and practices, to recognize and internalize environmental costs, to manage pollution at the source, to build in "process" changes rather than add on "end-of-pipe" solutions, and to develop technologies that ultimately aim for "zero discharge."
- Recognition of sustainable development and implementation of policies linking long-term economic growth to environmental management are essential.
- Environmental issues are increasingly linked to global economic and political stability.

New demands are emerging for energy efficiency and renewal, for the sustainable management of resources and biodiversity and for more global responsiveness to issues such as ozone depletion and global warming. There is a case for the promotion of technologies across all industrial sectors that may be more environmentally friendly, from transportation systems, to construction, to a wide range of industrial processes and consumer products. A wider industry definition will become extremely important for future environmental industry development. Environmental responsiveness is strategic to all industrial sectors and key to the economic sustainability of both developed and developing countries.

Canadian Position

Canada's environment industry is composed of some 4000 firms marketing a wide range of products and services. Largely composed of SMEs, it represents 142 000 knowledge- and

science-based jobs, with output per worker at \$130 000, some 25 percent higher than general manufacturing.

This fast-growing sector is undergoing continuous definition in response to a changing environmental agenda. An estimated 65 percent of environment firms provide services, and 35 percent are involved in manufacturing. The latter are believed to have shipments of about \$5 billion per year, while environmental services account for \$4 billion in revenues. Exports amount to approximately \$1 billion annually, with almost 80 percent directed at the U.S. market.

Canada has a solid environmental science and technology base upon which to build, including research and development (R&D) facilities within companies, universities and federal and provincial governments. In addition, Canada has built a good reputation for monitoring and measurement instrumentation; emission prevention and control technologies; and solid and liquid waste-handling equipment (specialty incinerators, shredders, compactors, recycling systems and equipment). Capabilities extend to the manufacturing of equipment components, including attachments for pumps and valves, separators and filters.

The environmental services subsector includes firms that provide consulting and related engineering, scientific and technical services. These services are offered in such areas as studies, plans and projects for resource conservation and protection, water supply, sewage collection and treatment, solid waste disposal, industrial waste water treatment, air pollution controls and energy conservation. Consulting engineering firms, software developers, solid waste management operators and recyclers, private laboratories and research establishments are included in this group.

Environmental services industry firms have won many offshore engineering projects and have enjoyed success through activities and projects supported by IFIs. Multidisciplinary environmental consulting, acquisitions and mergers, joint ventures and strategic alliances are increasingly

being used to enhance corporate capabilities and to expand market share.

The Canadian Office for Technology Exchanges (COTE) helps developing countries sustain their resources and strengthen their economies. COTE activities in the past year, related to pursuing opportunities in international conventions and agreements, have also uncovered complementary, more conventional commercial prospects in new markets for many firms.

The primary challenge is to continue building momentum in international markets, including markets of the developing world, with a strategic planning approach supportive of market-responsive environmental products and services. It is important for the industry to establish its dominance in the domestic market, and to be well positioned internationally. During the past five years, active Canadian exporters have doubled to over 600 firms, with another 1200 export-ready. The Government will work to increase the number of exporters and to broaden their market base by exploring new market opportunities.

Strategic Direction

To add to the existing strategic approach and improve the competitive position of the environmental sector, the Government has developed with industry "A Strategy for the Canadian Environmental Industry," a more complete "tool-kit" for exporters. It includes:

- the Environmental Market Intelligence Program: studies, workshops, conferences, promotional buyer-supplier events, focus groups and supporting databases (Industry Canada [IC], the Department of Foreign Affairs and International Trade [DFAIT]);
- delivery of information and intelligence, targeted trade shows, missions and other exchanges, for technology acquisition, trade enhancement, investment and business alliances promotion (IC, DFAIT, EC);
- strategic market and international business planning to guide trade, technology transfer and partnering arrangements with advanced countries including the United States, Western Europe and Japan (IC, DFAIT);
- the International Environmental Management Program: an initiative to transfer to developing economies Canadian public- and private-sector expertise and training relating to regulations, policies and technical programs. This supports the export of Canadian environmental systems, equipment, expertise and technologies (EC, IC, CIDA);
- the Strategic Alliances and Networks Program: co-operation of Canadian services and products suppliers through formation of strategic alliances, business networks and other links to tackle markets in Asia, Latin America, Eastern and Western Europe, the Middle East and other areas (IC, DFAIT, EC);
- priority alliances among Canadian, Mexican and American firms, for investment, trade, technology transfer and new business development under the NAFTA (DFAIT, IC, EC);
- country-to-country co-operative arrangements such as memorandums of understanding (MOUs) as required, to improve trade access (DFAIT, IC);
- the International Environmental Conventions and Agreements Program: focussing on IFI-supported activities, the Canadian Environmental Training Opportunities Program and other R&D and technical capacity-building initiatives (such as the Montréal Protocol bilateral program) unlocks entry mechanisms and encourages the participation of Canadian environmental companies in working with developing country clients. The delivery of international programs and projects provides market-entry and opens follow-up business opportunities (CIDA, DFAIT, IC, EC);
- targeted pursuit of other IFI-supported environmental projects, with particular

emphasis on the Pacific Rim markets of Indonesia, Thailand, Malaysia and Singapore (IC, DFAIT);

- the International Environmental Technology Demonstration Program: the Government will examine the feasibility of establishing a proposed revolving fund to assist market entry and to adapt and demonstrate technologies in developing countries, with an emphasis on clean processes and proven technologies (IC, EC, DFAIT, CIDA).

Contacts

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and International Trade
Sectoral Liaison Secretariat
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Environmental Equipment and Services

Activity	Date	Location	Dept.	Contact
Africa and the Middle East				
Environmental Mission	Jun-95	Johannesburg	DFAIT	613-944-6590
African Development Bank Seminars	Oct-95	Abidjan	DFAIT	613-944-6579
Air Quality Monitoring and Air Pollution Seminars	Dec-95	Tel Aviv, Jerusalem	DFAIT	613-944-6994
Asia-Pacific South				
Environmental Trade Mission	May-95	Asia-Pacific	EC	819-953-3090
Thai Mission to 7th Canadian Conference on Geomatics: Info Systems	Jun-95	Ottawa	DFAIT	613-995-7662
Environmental Technology Seminars	Aug-95	Sydney, Melbourne, Adelaide, Perth	DFAIT	613-995-7652
Biological Gas Cleaning Mission	Jan-96	Germany, Netherlands	EC	819-953-2844
Central/Eastern Europe and the Commonwealth of Independent States				
Environmental Technology Workshop/Mission	Jun-95	Slovakia	IC	613-941-0886
Mission - Environmental Management Units	Jul-95	Romania	IC	613-941-4517
Environmental Technology Workshop/Mission	Oct-95	Romania	IC	613-941-0886
East Asia				
Environmental Technology Workshop/Mission	TBD	China	IC	613-941-0888
Energy Efficiency Mission	May-95	China	IC	613-941-0888
Taiwan Air Pollution Incoming Buyers' Mission	May-95	Vancouver, Calgary, Toronto	DFAIT	613-995-8744
Taipei International Environmental Protection Show	Jul-95	Taipei WTC	DFAIT	613-995-8744
Environment '95 - National Stand	Aug-95	Seoul	DFAIT	613-995-8744
Taiwan Waste Water/Ground Water Treatment Mission	Oct-95	Vancouver, Toronto, Montréal	DFAIT	613-995-8744
Environmental Technology Workshop/Mission	Oct-95	India	IC	611-395-4526
Environmental Business Mission	Nov-95	Malaysia, Indonesia, Viet Nam	IC	613-954-2938
Environmental Business Mission	Jan-96	Taiwan, Korea	IC	613-954-2938
Solid Waste Technology - Mission	Jan-96	China	IC	613-941-0888
Maritime Pollution Control Seminar	Jan-96	Seoul	DFAIT	613-995-8744

Note: Dates and locations are subject to change.

Activity	Date	Location	Dept.	Contact
Latin America and the Caribbean				
Canada-Brazil Environmental Technology Workshops	Apr-95	Santiago	IC	613-954-3434
Enviro-Pro Trade Fair	25-Apr-95	Mexico City	DFAIT	613-996-8625
Mission - Pro Eco-95 Conference	May-95	Monterrey	IC	613-954-3229
Environmental Technology Workshop/Mission	Jul-95	Sao Paulo	IC	613-954-3434
Environmental Technology Workshop/Mission	Oct-95	Buenos Aires	IC	613-954-3434
Multiple Markets				
Mission - Technology Transfer	Sep-95	Germany, U.S., Japan	EC	819-994-3475
Environment & Energy Conference	31-Oct-95	Toronto	Ontario	416-323-4581
Environmental Business Mission	Nov-95	Europe, North Africa	IC	613-954-3382
Globe '96 - Incoming Visitors	Mar-96	Vancouver	DFAIT	613-996-1431
Globe '96 - Info Booth	Mar-96	Vancouver	IC	613-954-3211
United States				
Strategic Alliance Seminar/Mission	Apr-95	Minneapolis	DFAIT	613-944-7348
Mission - Air Pollution Control	Apr-95	Los Angeles	DFAIT	613-944-9478
U.S. Environmental Market Newsletter	Apr-95	U.S.	DFAIT	613-944-9478
Waste Expo '95 - National Stand	26-Apr-95	Chicago	DFAIT	613-944-9478
Mission/Partnering Hazardous Waste/Site Clean-up	May-95	Cincinnati	DFAIT	613-944-9478
Market Study - Hazardous Waste Products & Services	May-95	New York, NY	DFAIT	613-944-9478
Toronto Environmental Show - Eastern U.S. Mission	May-95	Toronto	DFAIT	613-944-9478
New England Environmental Expo - National Stand	09-May-95	Boston	DFAIT	613-944-9478
Environmental Laboratories Partnering Workshop	Jun-95	New York, NY	DFAIT	613-944-9478
Hazardous Waste/Site Remediation Partnering Workshop	Jun-95	San Francisco	DFAIT	613-944-9478
Canada-U.S. (CUE) Hazardous Waste Partnering	Aug-95	Oak Ridge	DFAIT	613-944-9478
TRICIPE Show/Hanford Clean-up - Info Booth	Aug-95	Richland	DFAIT	613-944-9478
Mission to Army Environmental Centre of Excellence	Sep-95	Rock Is.	DFAIT	613-944-9478
Market Study - Pulp & Paper, Northwest U.S.	Sep-95	Seattle	DFAIT	613-944-9478
Market Report - U.S. Department of Environment Sites	Sep-95	Seattle	DFAIT	613-944-9478
Market Study - Defence Environmental Restoration	Sep-95	Ottawa	DFAIT	613-944-9478
American Military Engineers Conference - Info Booth	Sep-95	Anchorage	DFAIT	613-944-9478
Eco Expo '95 - Info Booth	Sep-95	Boston	DFAIT	613-944-9478
Market Study - Industrial Waste Water	Sep-95	New York	DFAIT	613-944-9478
Hazardous Waste/Site Remediation Mission	Oct-95	Aberdeen, MD	DFAIT	613-944-9478
Mission: Site Remediation	Oct-95	San Diego	DFAIT	613-944-9478

Activity	Date	Location	Dept.	Contact
Partnering Workshop Picatinny Arsenal	Oct-95	New Jersey	DFAIT	613-944-9478
Services Partnering Workshop	Oct-95	Cleveland	DFAIT	613-944-9478
Pollution Prevention Partnering Workshop	Oct-95	Princeton	DFAIT	613-944-9478
Market Study - Industrial Waste Water	Oct-95	Dallas	DFAIT	613-944-9478
New Jersey Environmental Expo '95 - Info Booth	Oct-95	Somerset	DFAIT	613-944-9478
New York Environmental Exhibition '95 - Info Booth	Oct-95	Syracuse	DFAIT	613-944-9478
Market Study - Hazardous Waste	Oct-95	New York, NY	DFAIT	613-944-9478
Market Study - Drinking Water/Waste Water	Oct-95	Pittsburgh	DFAIT	613-944-9478
Water Environment Federation: National Stand	23-Oct-95	Miami	DFAIT	613-944-9478
Partnering Opportunities with University of Connecticut	Nov-95	Hartford	DFAIT	613-944-9478
HazMat West - National Stand	07-Nov-95	Long Beach	DFAIT	613-944-9478
Industrial Waste Water Partnering Workshop	Dec-95	Dallas	DFAIT	613-944-9478
Mission - Industrial Waste Water	Feb-96	San Diego	DFAIT	613-944-9478
Environment Strategic Partnering	Mar-96	Denver	DFAIT	613-944-7348
Rensselaer Polytechnic Partnering Workshop	Mar-96	Albany	DFAIT	613-944-9478
"Doing Business With DOE" - Partnering Workshop	Mar-96	Seattle	DFAIT	613-944-9478
Industrial Waste Water Technologies Partnering Workshop	Mar-96	Princeton	DFAIT	613-944-9478
Great Lakes Water Quality Regulations Workshop	Mar-96	Buffalo	DFAIT	613-944-9478

Western Europe and European Union

Mission to Defence Contractor	May-95	Los Angeles	DFAIT	613-944-9481
Waste Water Mission	Jun-95	Germany, France	IC	613-954-3225
Envitec - Info Booth/Mission	Jun-95	Dusseldorf	DFAIT	613-996-1530
Pollutec '95 - Info Booth/Mission	Oct-95	Paris	DFAIT	613-996-1530
Ecotech '95 - Mission	Dec-95	Utrecht, Berne	DFAIT	613-996-1530
SEP Pollution '96 - Info Booth/Mission	Mar-96	Padua	DFAIT	613-996-1530

Acronyms and Initialisms Used in The International Trade Business Plan

(This list does not include sector-specific references)

ACOA	Atlantic Canada Opportunities Agency	IC	Industry Canada
AG Can	Agriculture and Agri-Food Canada	IDRC	International Development Research Centre
ASEAN	Association of Southeast Asian Nations	IFI	international financial institution
BBS	electronic bulletin board system	ISO	International Standards Organization
BOSS	Business Opportunities Sourcing System	ITBP	International Trade Business Plan
CCC	Canadian Commercial Corporation	ITC	International Trade Centre
CIDA	Canadian International Development Agency	MAPAQ	Ministry of Agriculture, Fisheries and Food of Quebec
CIS	Commonwealth of Independent States	MDB	multilateral development bank
CSA	Canadian Standards Association	NAFTA	North American Free Trade Agreement
DFAIT	Department of Foreign Affairs and International Trade	NATO	North Atlantic Treaty Organization
DFO	Department of Fisheries and Oceans	NRC	National Research Council
DND	Department of National Defence	NRCan	Natural Resources Canada
EC	Environment Canada	NRCan-CFS	Natural Resources Canada - Canadian Forest Service
EDC	Export Development Corporation	OECD	Organization for Economic Co-operation and Development
EU	European Union	PEMD	Program for Export Marketing Development
FITT	Forum for International Trade Training	R&D	research and development
FORDQ	Federal Office of Regional Development - Quebec	SMEs	small- and medium-sized enterprises
FSU	former Soviet Union	UNEP	United Nations Environmental Program
FTA	Canada-U.S. Free Trade Agreement	WED	Western Economic Diversification
GATT	General Agreement on Tariffs and Trade	WTO	World Trade Organization
GDP	gross domestic product		
GNP	gross national product		
HRDC	Human Resources Development Corporation		

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ACOA	Atlantic Canada Opportunities Agency	IC	Industry Canada
AG Can	Agriculture and Agri-Food Canada	IDRC	International Development Research Centre
ASEAN	Association of Southeast Asian Nations	IFI	international financial institution
BBS	electronic bulletin board system	ISO	International Standards Organization
BOSS	Business Opportunities Sourcing System	ITBP	International Trade Business Plan
CCC	Canadian Commercial Corporation	ITC	International Trade Centre
CIDA	Canadian International Development Agency	MAPAQ	Ministry of Agriculture, Fisheries and Food of Quebec
CIS	Commonwealth of Independent States	MDB	multilateral development bank
CSA	Canadian Standards Association	NAFTA	North American Free Trade Agreement
DFAIT	Department of Foreign Affairs and International Trade	NATO	North Atlantic Treaty Organization
DFO	Department of Fisheries and Oceans	NRC	National Research Council
DND	Department of National Defence	NRCan	Natural Resources Canada
EC	Environment Canada	NRCan-CFS	Natural Resources Canada - Canadian Forest Service
EDC	Export Development Corporation	OECD	Organization for Economic Co-operation and Development
EU	European Union	PEMD	Program for Export Marketing Development
FITT	Forum for International Trade Training	R&D	research and development
FORDQ	Federal Office of Regional Development - Quebec	SMEs	small- and medium-sized enterprises
FSU	former Soviet Union	UNEP	United Nations Environmental Program
FTA	Canada-U.S. Free Trade Agreement	WED	Western Economic Diversification
GATT	General Agreement on Tariffs and Trade	WTO	World Trade Organization
GDP	gross domestic product		
GNP	gross national product		
HRDC	Human Resources Development Canada		



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