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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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Fish and Sea Products

The Canadian fish and sea products industry comprises firms engaged in the processing and marketing of fish, shellfish, and marine plants and animals, as well as byproducts such as fish meal and fish oil. These firms process fish supplied by Canadian fish harvesters, produced by Canadian aquaculture (fish farming) operations, or imported from foreign suppliers for further processing in Canada.

International Environment

The annual world harvest of fish and shellfish (including aquaculture) in 1992 was 98.1 million tonnes, an increase of 1.06 million tonnes from 1991. Up to 31 percent of the total world fish and shellfish catch was processed into fish meals, oils and other industrial products. International wild-capture fish levels are stagnant or decreasing, and fish catch patterns have changed.

World demand is now expected to grow steadily from under 100 million tonnes in 1990 to 120 million tonnes by the end of the decade. The earth's population is expected to grow by 16.7 percent from 5.25 billion to 6.13 billion by the year 2000, with 92 percent of that growth occurring in developing countries. Global per capita seafood consumption may rise from 13.4 kg (edible weight) to 15.2 kg by the year 2000, meaning an increase in consumption from 64 million tonnes to 94.5 million tonnes. As a result of the overbuilding of fishing fleets, the wild capture fishery catch has begun to decline,

and aquaculture products will play a greater role in meeting world demand. In 1992, world aquaculture production was 13.9 million tonnes (US\$27.6 billion). Global aquaculture farming is steadily maturing, showing a growth rate of 13.6 percent a year since 1984, with production expected to reach 19.6 million tonnes by the year 2000.

Twenty years ago, developed countries accounted for more than 60 percent of the wild fish catch. The situation is now reversed, with developing countries now accounting for this 60-percent share. A striking illustration of the changes in wild fisheries catches is China, which has overtaken both Japan and the former Soviet Union (FSU). In 1993, China maintained its leading position for the fourth year in a row with massive landings of 16.5 million tonnes, followed by Peru with 8.4 million tonnes. Next was Japan with 7.9 million tonnes and Chile with 6.0 million tonnes. The Russian Federation dropped to sixth overall at 4.7 million tonnes, while the United States moved up to fifth position with an increase of landings to 5.87 million tonnes. Canada was eighteenth with 1.25 million tonnes, dropping three positions since 1992.

Figure 1 — World's Top Five Fish Exporters



Source: Food and Agricultural Organization, Department of Fisheries and Oceans

Access Issues

Although Canada has benefited from reduced tariffs achieved through the General Agreement on Tariffs and Trade (GATT), some tariffs and non-tariff barriers such as import licensing, quotas, unjustified technical standards and health regulations, continue to inhibit Canadian access to foreign markets. In addition, tariffs are significantly higher on further-processed products. In the European Union (EU), for instance, tariffs remain higher than in many developing countries.

Environmental Considerations

Consumer-driven environmental issues are more and more likely to affect trade as environmental concerns come to the fore, both directly as in the effect of pollution on fish and fish habitats, and indirectly through the proper use and management of seas and oceans. The management of natural resources such as fish stocks is also receiving greater attention, with management authorities moving to a more encompassing approach, for example, from a single species to a larger ecosystem approach.

Internationally, Canada shows strong leadership in marine environment issues. In June 1994, Canada hosted a meeting of experts on the Montréal guidelines (1985) under the auspices of the United Nations Environment Program. Canada works closely with other maritime nations to deal with the global environmental fisheries crisis caused by overfishing of the "global commons." With the Atlantic groundfish crisis as a catalyst, Canada is working with these nations to develop a practical and effective set of rules to manage high-seas fishing of straddling and highly migratory stocks. On the Pacific coast, Canada continues to press for conservation and equity as outlined in the Pacific Salmon Treaty signed by Canada and the United States in 1985. The Treaty expired in 1992, and in 1993 a one-year arrangement was negotiated, but no agreement was reached in 1994.

Aquaculture

The growth of aquaculture will not be without limitations and problems. Disease, climate changes, environmental degradation and the increasing need of high-protein feed stuffs will modify the growth rate of the global aquaculture industry. These impacts will change the species that are utilized and will require producers to adapt. The industry will have to streamline its operations to realize even a marginal profit increase. It will be necessary to develop operating

systems management and quality control processes, and to conduct more research in genetics and marketing.

The production of high-value (in marketing terms) carnivorous aquaculture fish and shrimp species, such as trout, salmon, yellow-tail, eel, seabream, sea bass and marine shrimp, almost totally depends on the use of compound aqua feeds.

Fish meal and oil are currently the essential feed ingredients for all industrially produced aqua feeds for carnivorous fish and shrimp. Generally, fishery products, such as fish meal, fish oil, fish protein concentrates, squid and shrimp meal, make up about 70 percent of the total aqua feed for most farmed carnivorous species. Recent estimates suggest that 1 million tonnes of fish meal were used in aqua feeds in 1992. Fish meal/oil usage in aqua feeds is expected to increase to 1.5 million tonnes or 20 percent of total world supply by the year 2000. Compound aquaculture production will increase by 5 percent per year to over 4.5 million tonnes by 2000. Total compound animal feed production in 1993 was 610 million tonnes (US\$55 billion), in which aquaculture usage was only 3 percent, with the rest used for farm livestock production.

If aquaculture is to play a significant role in food security, the species chosen for mass production should have herbivorous feeding habits to reduce dependency on high-quality, food-grade, protein-rich feed inputs. The majority of aquaculture production in developed countries is based on the culture of high-value carnivorous fish or shrimp species, whereas in developing countries it is based generally on low-value herbivorous species. Developing countries currently account for 80 percent of total world aquaculture production, and they are net protein producers with more energy-efficient farming systems. The real contribution of aquaculture products will be measured by its affordability as a much needed source of cheap protein for the global population.

Canadian Position

The Canadian fish, marine plants and seafood industry has a highly diversified resource of shellfish, pelagics and groundfish, and is well regarded globally for producing and exporting a variety of top-quality, pollution-free products. Exports are primarily in the live, fresh, frozen, cured and canned forms. Processors pursue opportunities for innovative, ready-to-serve product forms in niche markets, and the Canadian fishing industry continues to be a major contributor to the economies of many Atlantic, Pacific and inland communities.

The industry is currently undergoing significant adjustment as a result of supply shortages for certain finfish species, intense competition in foreign markets and increased global supply of certain groundfish species and salmon. Total fishery landings in Canada decreased to 1.25 million tonnes in 1993, down from 1.3 million tonnes in 1992. The value of landings in 1993, at \$1.4 billion, fluctuated little from 1992 levels. On the Atlantic coast, groundfish landings declined by 38 percent to 286 634 tonnes in 1993. Total value of these landings decreased by 41 percent to \$187 million. Total landings of pelagic species fell 5000 tonnes to 281 031 tonnes in 1993, resulting in a total value of \$74 million. Shellfish landings rose to 260 030 tonnes in 1993, up from

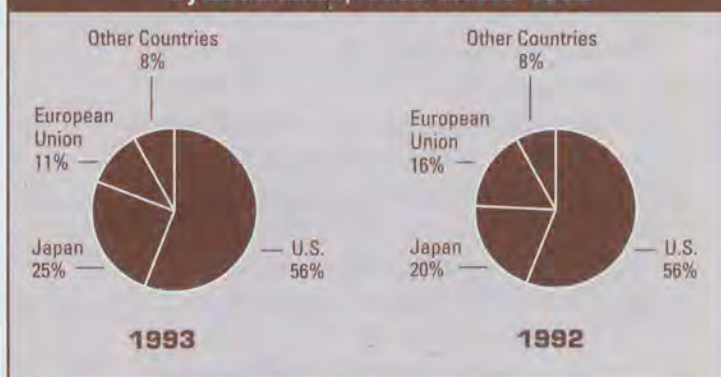
238 214 tonnes the previous year. The value of shellfish landings amounted to \$635 million in 1993, an increase of approximately 8 percent over 1992.

On the Pacific Coast, landings decreased from 295 851 tonnes in 1992 to 279 984 tonnes in 1993, yet total value increased to \$423 million from \$416 million in 1992. Shellfish landings decreased in 1993 to 26 789 tonnes, from 31 201 tonnes in 1992, while total value increased by 18 percent to \$73 million. Of the 34.7 million salmon caught in British Columbia's commercial fisheries in 1993, nearly 14 million were Fraser River sockeye, a new record catch. Overall, 18 million sockeye were caught in B.C. waters in 1993, 6 million more than anticipated. Catches of coho (1.8 million) and pink salmon (9.7 million) were substantially below forecast levels, while chinook catches totalled 600 000, as expected. A catch of 4 million chum salmon was twice the amount forecast. Salmon landings were valued at \$190 million, an increase of 16 percent from 1992.

In 1993, Canadian fisheries production was valued at \$2.9 billion, and Canada exported 500 318 tonnes of fish products, valued at \$2.57 billion, compared to 1992 exports of \$2.49 billion. For the first six months of 1994, Canadian exports increased by 4 percent to \$1.18 billion, compared to the same period in 1993. The growth in exports can be attributed to high-valued shellfish and aquaculture products mainly to the United States and Japan. Canada currently ranks fifth in the world in seafood export value. The domestic market has declined, from 24 percent of product value sold in 1992 to 16 percent in 1993. This displacement is being filled by increased imports of 17 percent in quantity and 10 percent in value over the first half of 1994.

In 1993, Atlantic Canada had the largest commercial fishery with a total production of \$1.8 billion. The processing sector on the Atlantic Coast consists of approximately 900 establishments that employ more than 60 000 individuals. Three

Figure 2 — Canadian Fish and Seafood Exports by Destination, 1993 versus 1992



Source: Statistics Canada, International Trade Division

large, vertically integrated companies account for half of the production value, but diversification in size must be noted. For example, 228 of Nova Scotia's 320 registered fish processing plants have sales between \$2 million and \$10 million.

The Pacific fishery consists of about 200 processing facilities, with average monthly employment estimated at 5700. Highly seasonal employment peaks to about 10 000 in August and decreases to about 3000 in December. The value of fisheries production was approximately \$0.9 billion in 1993, with salmon accounting for 46 percent and herring 20 percent of total production. Canned and frozen salmon account for 80 percent of the salmon output value.

Canada's freshwater fisheries are concentrated around the Great Lakes and in central and northern Canada. In 1993, freshwater landings totalled over 35 000 tonnes with a value of \$160 million.

Canada's aquaculture industry ranges from small family operations to large integrated multinational firms. Currently, salmon, oysters, trout and mussels are the main species produced by the aquaculture sector. Scallops, manila clams and arctic char have entered the commercial stage, but total production remains small. Total value of aquaculture production (farm gate) in Canada was more than \$290 million in 1993 as compared to \$259 million in 1992. Additionally, the supply and services sector of the fish farming industry generated more than \$270 million in domestic and export sales.

The value of aquaculture production continues to surpass the landed value of wild production for trout, salmon, mussels and oysters. In 1993, farmed salmon production represented 56 percent of the value of all commercial salmon production. Farmed trout and mussels account for virtually the entire commercial production, with aquaculture oysters representing 85 percent of total value in 1993.

In Atlantic Canada, it is generally accepted that a 50-percent target reduction in capacity is

required to achieve an economically viable and ecologically sustainable fishery. The offshore fleet has already undergone substantial capacity reduction without government intervention. For example, there are currently 48 vessels greater than 100 feet registered to fish groundfish, compared to 125 active offshore groundfish vessels in 1989, a 60-percent decrease. Overcapacity is the principal cause of the industry's dependence on government support. In 1981, for example, a fishing crew's income supplementation through Unemployment Insurance (UI) benefits equalled 27 percent of total earnings. By 1990, this increased to 52 percent. The increase in income from UI demonstrates the industry's limited capacity to sustain employment. Similarly, plant workers derive an average of 50 percent of their individual incomes from Unemployment Insurance benefits. Long-term reduction in the industry is necessary if it is to remain viable and sustainable.

Capacity reduction is a key component of the Atlantic Groundfish Adjustment Strategy (TAGS), implemented on May 16, 1994, to assist an estimated 30 000 fishers and plant workers affected by groundfish closures in Atlantic Canada and Quebec. TAGS is a \$1.9-billion, five-year program designed to provide adjustment measures for individuals to achieve a 50-percent reduction in capacity and to promote industry renewal. Other programs and policies are also required, such as a new licensing policy, reforming the Unemployment Insurance program and creating economic opportunities to complement capacity-reduction efforts.

Additional challenges facing the Canadian fisheries sector include:

- the impact of globalization, such as increasing competition from developing countries with low-wage structures, including Russia and China, which requires that the Canadian fish and seafood sector pursues strategic partnerships, alliances and investment opportunities to secure raw material for processing and markets for Canadian products, particularly value-added products;

- lower-priced competing proteins such as chicken, whitefish substitutes, and the loss of cod markets in the U.S. to other fish such as catfish, tilapia, hoki, Alaska pollock, and hake;
- process automation and design, development and use of new packaging materials, and adaptation of biotechnology processes, which will require scientists, fishers, financiers, processors and marketers to work closely together to provide a stronger base for Canada's trade performance;
- a need to heighten the awareness of international consumers, institutions and retailers of Canada's consistently high-quality supply of traditional and non-traditional, farmed and value-added fishery products;
- a need to review Canada's harvesting and fish inspection regulations to allow Canadian firms to operate effectively in a competitive environment;
- a need for marketing strategies for some non-traditional species in light of uncertain resource forecasts and the high cost of product and market development;
- a need for the Canadian industry, particularly on the West Coast, to reduce its dependence on Japan, which is the major frozen salmon market and the only market for salted herring roe;
- the slow progress on new product development due to tariff and non-tariff barriers on value-added seafood in many foreign markets.

Several positive developments are under way in the Canadian fisheries industry that demonstrate greater innovation and competitiveness — necessities for survival in the global marketplace. The West and East Coast fisheries in particular have recorded some success in adjusting to the emerging realities of the 1990s and beyond. For example:

- joint ventures, technology exchanges and marketing arrangements with foreign firms in Japan, the United States and in European countries are increasing;
- to maintain resource sustainability and increase competitiveness, considerable pre-competitive, co-operative initiatives now exist in product-processing and post-processing technology such as research on ozonation and wastewater treatment;
- the seafood trade in British Columbia is becoming more global, increasingly buying, processing and marketing products other than those of Canadian origin and exporting them worldwide;
- Newfoundland and Nova Scotia have replaced an estimated 80 000 tonnes of raw material needs through global sourcing, and have effectively brought these products to market;
- the West Coast industry has been successful in increasing its penetration of the U.S. market, and is actively looking to growth areas such as Latin America and Mexico;
- the establishment of the British Columbia Salmon Marketing Council and the involvement of primary producers in marketing issues is giving a new focus to quality and competitiveness at the producer level.

Proximity and ease of access to the U.S. market is a major advantage for Canadian exporters. Canada has also benefited from preferred access to the United States under the Canada-U.S. Free Trade Agreement (FTA). The FTA set out a 10-year schedule for tariff elimination, with all tariffs on Canada-U.S. trade to be eliminated by 1998.

The Canadian industry remains concerned over unpredictable U.S. border inspection practices, particularly in shipments of fresh fish. Work is continuing in the Technical Working Group on Fish and Fishery Products established under the FTA. Success has been achieved in determining equivalency in the action levels for assessing the quality of frozen groundfish products. Technical exchanges are continuing, including cross-border training of inspection staff and electronic interfacing of inspection databases.

The U.S. is now in the process of finalizing its seafood Hazard Analysis Critical Control Point (HACCP) program. It is expected that Canada and the U.S. will be able to conclude a mutual recognition agreement, thereby facilitating market access.

Work is proceeding on improving harmonization of sensory standards used by Canada and the United States. It is expected that a declaration of equivalency will soon be made in molluscan shellfish inspection programs.

The North American Free Trade Agreement (NAFTA), which took effect on January 1, 1994, gives Canadian exporters preferential access to a market of over 85 million people in Mexico. The NAFTA will eventually eliminate tariffs on Mexican imports of fishery products from Canada and the United States. Tariffs have already been eliminated for a number of species of interest to Canada, including Atlantic and Pacific salmon, crab, hake, herring, mackerel, haddock and dried smoked fish. In addition, tariffs will be phased out over five years for lobster, scallops, mussels, oysters, halibut and prepared and processed fish, and over 10 years for frozen fish fillets. Mexican import licences for lobster will no longer be required.

Implementation of the Uruguay Round of the GATT will improve Canadian market access in many countries, particularly in Japan where tariffs will be reduced by 30 percent, in Korea where tariffs will decline 10 percent to 20 percent, and in the EU where groundfish tariffs on many items of interest to Canada will fall to the 7.5-percent to 12-percent range. Opportunities will also arise in developing countries, which will reduce tariffs by about 30 percent and bind them.

Improvements for Canadian firms have also been realized, with better market access to the EU resulting from the 1993 recognition of equivalency of Canada's fish inspection system with its reliance on its Quality Management Program. This success has led to an exemption from the

mandatory import inspection requirements implemented by the EU in January 1993. Fishery products not currently covered by the derogation include trade in live molluscan shellfish products and, because of fish health and disease concerns, of live aquaculture products. Efforts will be undertaken to conclude agreements for these products in 1995, to permit similar ease of access into the European Union.

Concerns have been raised that a global veterinary agreement on meat and fishery products proposed by the EU might have an impact on the benefits Canada now receives under Commission decision 93/495/EEC, an equivalency agreement that establishes conditions for importing fishery products from Canada to the European Union. In relation to this, the EU has also introduced minimal sampling frequencies on imports, which might result in additional costs and delays for Canadian imports to the European Union.

Canada has sought assurances that the mutual recognition directive for fish and fish products will continue to apply while a global veterinary agreement is being negotiated.

A series of memorandums of understanding has been concluded in the areas of inspection, certification, technical co-operation, trade and information exchanges. Such agreements are now in operation with Australia, Japan, Thailand, the Philippines and Iceland.

It is expected that new inspection agreements will be completed in 1995 with New Zealand and South Africa, which should provide improved access for Canadian products to these markets.

The Department of Fisheries and Oceans (DFO) will negotiate with countries where potential exists for inspection agreements. Argentina, Chile, and possibly other Latin American countries might be considered for future agreements. It is also likely that the inspection agreement with Iceland will be broadened into a mutual recognition agreement.

Strategic Direction

Enhance and Defend Market Access

- given the conclusion of the Uruguay Round, with the exception of some opportunities to seek lower tariffs through NAFTA mechanisms, and through negotiating lower unbound rates, the focus will be on addressing and removing non-tariff barriers (NTBs);
- NTBs are perceived to be proliferating; working with industry, the Government will maintain and update the fish tariff and NTB inventory, with regular status reports on efforts to resolve issues provided to industry and sector advisory groups;
- priority issues have been identified and will be addressed (shown below). Industry will report any new problems, and review the priority list as issues develop.

Tariff Liberalization Opportunities

- Mexico: accelerated tariff reductions, e.g. canned herring;
- Japan: for all tariffs, pursue opportunities for autonomous suspensions and other administrative guidelines to make trade more profitable;
- newly industrialized countries (NICs): seek lower unbound tariffs, pursue maximum possible tariff reductions for fisheries products as Chinese and Taiwanese GATT accessions are finalized;
- European Union: pursue unilateral reductions in herring and smoked salmon tariffs;
- United States: listeria and border inspection regime;
- European Union: scallop nomenclature (France); import inspection regime (France and EU derogation or mutual recognition agreement); arbitrary inspection procedures (France in particular).

Non-tariff Barriers

- Korea, Taiwan: address all NTBs;
- Australia: salmon import ban (now in GATT XXII consultations);
- through the NAFTA, negotiations of new rules on subsidies, countervailing duties and anti-dumping actions need to be monitored to protect fisheries interests (Department of Foreign Affairs and International Trade [DFAIT], DFO).

Trade Enhancement

- the possibility of negotiating bilateral agreements such as the mutual recognition of inspection systems will be investigated;
- the 1948 Molluscan Shellfish Agreement will be updated;
- preparations will be made for the implementation of CODEX standards, expected to be approved by the Commission in 1995 (DFO, DFAIT, Seafood Industry Policy Advisory Committee [SIPAC]).

Trade Development

- enhance the SIMS group with the inclusion of a Sectoral Working Group on International Trade (SAGIT) working committee to help improve the effectiveness of interdepartmental activities, and co-ordinate activities of the provinces under a "Team Canada" approach;
- work with industry to focus trade development activities on high-priority markets identified by industry;
- monitor progress in achieving target results;
- work with industry to develop special trade development activities (including new approaches not currently supported through existing programs) in market niches, as identified by industry;
- begin reviewing financial and taxation tools that could help companies diversify their exports and increase the per-unit value of exported goods and services;

- continue to send Canadian experts to international organizations to provide education and training that could lead to trade links in the future;
- examine the feasibility of removing the \$50-million non-eligibility criteria for Program for Export Marketing Development (PEMD) assistance under current rules, recognizing that the current federal government program review may determine different criteria for companies, with special consideration for small- and medium-sized enterprises (SMEs), thus providing transparency to the program and enhancing international strategic alliances and joint ventures;
- undertake an annual review of previous years' international trade development programs, and develop an assessment of the contribution of these programs to trade development (DFAIT, SAGIT, provinces, CIDA, DFO, Department of Finance).

Market Intelligence

- improve the quality of information and intelligence about the seafood industry outside Canada and, for selected missions, improve the timeliness of the information collected. DFAIT initiated FaxLink, a fax-on-demand communications systems and an Electronic Bulletin Board, to facilitate access to fisheries market information for Canadians;
- ensure that industry and government work to improve the dissemination and timeliness of information collected, and that industry assumes responsibility for providing feedback and information to DFAIT missions;
- enhance identification and feedback to Canada on commercial uptake of foreign harvesting, processing, post-processing and aquaculture technologies by greater use of the network of technology officers in DFAIT missions (DFAIT, SAGIT).

Trade Fairs and Missions

- move to describe, strengthen and take advantage of Canada's image as a supplier of quality products;
- ensure that government and industry co-operate in selecting appropriate Canadian firms to attend trade fairs and missions. Through the ITBP consultation process, they will also collaborate in planning trade promotion activities carried out by Canadian trade offices abroad;
- explore the possibility of industry or other federal-provincial secondments to key overseas missions through greater use of the Executive Interchange Program (DFAIT, SAGIT).

Contacts

Department of Foreign Affairs
and International Trade
Sectoral Liaison Secretariat
125 Sussex Drive
Ottawa K1A 0G2
Tel.: (613) 995-1713
Fax: (613) 943-1103

Department of Fisheries and Oceans
Marketing and Market Development
200 Kent Street
Ottawa K1A 0E6
Tel.: (613) 993-2540
Fax: (613) 990-9574/990-9764

Aquaculture
Tel.: (613) 993-2091
Fax: (613) 993-7651

Inspection and Enforcement
Tel.: (613) 990-0144
Fax: (613) 993-4220

Agriculture and Agri-food Canada
 Food Marketing Industries and Seafood
 Market Industry Services Branch
 930 Carling Avenue
 Ottawa K1A 0C5
 Tel.: (613) 995-9554
 Fax: (613) 992-0921

Canadian International Development Agency
 Natural Resources Division
 Professional Services Branch
 200 Promenade du Portage
 Hull, PQ K1A 0G4
 Tel.: (819) 997-0483
 Fax: (819) 953-4676

Recent Background Documentation

Global Market Opportunity Reviews
 (Source: DFAIT)
 Tel.: (613) 995-1713

Salmon, Fish and Seafood, Non-traditional
 Species, Lobster, Aquaculture.

Country Guidelines for Canadian Fish Exporters
 (Source: DFAIT)
 Tel.: (613) 995-1713

Austria, Australia, Belgium, China, Denmark,
 Hong Kong, Germany, Italy, Mexico, the
 Netherlands, Singapore, Republic of Korea, Spain,
 Switzerland, Taiwan, United Kingdom, Egypt,
 Sweden, Russia, the Philippines, France, the Gulf
 States, United States and Japan.

Copies are available from the Department of
 Foreign Affairs and International Trade.
 Contact: InfoCentre at 1-800-267-8376 or, by
 fax, (613) 996-9709.

A list of the fish and seafood publications available
 via facsimile may also be obtained through
 InfoCentre's FaxLink service, at (613) 944-4500.

Fish and Sea Products

Activity	Date	Location	Dept.	Contact
Africa and the Middle East				
Incoming Fisheries Mission from Iran	May-95	Halifax	DFAIT	613-944-7029
Fisheries Mission to Egypt/Middle East	Jul-95	Cairo	DFAIT	613-944-7029
Asia-Pacific South				
Canadian Food Promotion in New Zealand	Apr-95	Auckland, Wellington, Christchurch	DFAIT	613-995-7662
Incoming Salmon Mission from Australia and New Zealand	Jul-95	Vancouver	IC	613-996-1052
Canadian Food Promotion	Sep-95	Kuala Lumpur	DFAIT	613-996-5824
ASEAN Beef & Seafood Promotion (+beverages)	Mar-96	Various ASEAN Cities	DFAIT	613-996-5824
Canada				
Spanish Fish Buyers' Mission to Canada	Apr-95	Vancouver, Halifax	DFAIT	613-996-2147
ASEAN Food Executives Mission to Canada (also FMI)	May-95	Toronto, Montréal, Vancouver	DFAIT	613-996-5824
Incoming Chefs to Atlantic Canada	Jun-95	N.S., Nfld., P.E.I., N.B.	DFAIT	613-995-1677
Incoming Seafood Chefs/Journalists	Aug-95	B.C.	DFAIT	613-995-1677
Salmon Buyers' Mission to Canada	Oct-95	Vancouver	DFAIT	613-996-1052
Central/Eastern Europe and the Commonwealth of Independent States				
Fisheries Mission from Poland	05-Sep-95	N.B.	DFAIT	613-996-7107
East Asia				
Food & Beverage Promotion with Grocery Stores/Restaurants	Jan-95	Hong Kong	DFAIT	613-995-6962
Seoul Food '95	10-Apr-95	Seoul	DFAIT	613-996-7582
Seafood Promotion	Aug-95	Taichung	DFAIT	613-996-7582
Fish Buyers' Mission from Korea	Oct-95	B.C., Atlantic Provinces	DFAIT	613-995-8744
Japan				
Follow-up Japan Mission	Mar-95	Japan	B.C.	604-844-3156
Annual Canadian Culinary Competition	Apr-95	Tokyo	DFAIT	613-995-1677
Generic Fisheries Promotion	Apr-95	Tokyo	DFAIT	613-995-1677
Chef Seminar	Apr-95	Osaka	DFAIT	613-992-1677
Presentation by Fisheries Biologist from DFO	Apr-95	Tokyo	DFAIT	613-995-1677
Food & Consumer Products Gift Show	May-95	Tokyo	DFAIT	613-995-1677

Note: Dates and locations are subject to change.

Activity	Date	Location	Dept.	Contact
Tokyo International Seafood Show	Jun-95	Tokyo	DFAIT	613-995-1677
Solo Seafood Show & Seminar	Jun-95	Osaka, Fukuoka	DFAIT	613-995-1677
Atlantic Lobster Promotion	Oct-95	Tokyo	DFAIT	613-995-1677
Latin America and the Caribbean				
New Exporters to Mexico (NEWMEX) Mission	Apr-95	Mexico City	DFAIT	613-996-8625
Market Profile	Apr-95	Ottawa	DFAIT	613-996-8625
Solo Food Show	Oct-95	Mexico City	DFAIT	613-996-8625
ANTAD Expo '96	Feb-96	Guadalajara	DFAIT	613-996-8625
Canadian Seafood Exhibition/Buyers from Latin America	Feb-96	Miami	DFAIT	613-996-8625
Multiple Markets				
Regional Salmon Seminars	Aug-95	World/Various	DFAIT	613-995-1713
United States				
"Agrifood and Seafood Trade Events in the U.S." - Update	Apr-95	Canada	DFAIT	613-944-9474
Fish Market in Chicago Territory - Database & Booklet	Apr-95	Chicago	DFAIT	613-944-9474
Midwest Consumer Eating Habits - Fish	Apr-95	Chicago	DFAIT	613-944-9474
Quarterly Fish Market Newsletter	Apr-95	Canada	DFAIT	613-944-9474
4-5 Non-traditional Seafood Treasures Dinners	Apr-95	Cincinnati	DFAIT	613-944-9474
Lobster Seminar/Luncheon	Apr-95	New York	DFAIT	613-944-9474
Arizona Retail Grocers	May-95	Arizona	DFAIT	613-944-9474
Incoming Aquaculture & Shellfish Buyers from Minneapolis	May-95	Atlantic Canada & B.C.	DFAIT	613-944-9474
National Restaurant Show	May-95	Chicago	DFAIT	613-996-1677
Non-traditional Seafood In-store Promotion	Jul-95	Minneapolis	DFAIT	613-944-9474
Incoming Buyers - Atlanta	Aug-95	Canada/Various	DFAIT	613-944-9474
Seafare '95	Sep-95	Los Angeles	DFAIT	613-944-9474
Seafood Buyers from California	Oct-95	Western Canada	DFAIT	613-944-9474
Solo Food Show	Oct-95	Buffalo	DFAIT	613-944-9474
Canadian Seafood Exhibition	Feb-96	Miami	DFAIT	613-944-9474
NEBS to Boston Seafood	Mar-96	Boston	DFAIT	613-944-9474
Boston Seafood Show Industry Night	Mar-96	Boston	DFAIT	617-262-3760
Western Europe and European Union				
Mussel Promotion	Apr-95	Brussels	DFAIT	613-996-2147
European Seafood Exhibition	May-95	Brussels	DFAIT	613-996-2147
Outgoing Aquaculture Mission to Denmark, Norway	Aug-95	Silkeborg, Trondheim	DFAIT	613-995-4730
Anuga	Oct-95	Cologne	P.E.I.	613-996-2147

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 Canada		



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