CANADA'S EXPORT STRATEGY

The International Trade Business Plan

1995/96

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
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    - 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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Contents

Minerals and Metals

This sector covers ferrous and non-ferrous industries, and coal and industrial minerals. It includes mining, upstream processing such as smelting and refining, and downstream semi-manufacturing. Related equipment and services are covered in the second section of this report.

International Environment

Canada is the world's leading exporter of minerals and metals, followed by Australia. Recently, however, Russia has become an increasingly significant exporter of major non-ferrous metals. The largest importers and consumers of minerals and metals are Japan, the member countries of the European Union (EU), and the United States, which is also a major producer. China is also attracting more and more interest as both a major producing and consuming nation.

Growth in production is expected to continue, especially in Chile, Australia, Mexico, Brazil and China, while the fastest-growing consumption will occur in Asia (China, South Korea, Taiwan and Southeast Asian countries).

The forecast for demand in 1994-95 is positive, as most consuming Organization for Economic Co-operation and Development (OECD) countries are anticipating slowly improving industrial growth, and as Asian growth continues. Continued high export levels by the former Soviet Union (FSU) of aluminum, nickel and other metals will continue to put a damper on prices and limit increases for these commodities. North American demand is expected to show gains as the U.S. and Canadian economies continue to recover.

The results of the Uruguay Round of the General Agreement on Tariffs and Trade (GATT) will bring improvements in market access for non-ferrous minerals and metals, although they may not be as substantial as expected, especially for the European Union. This improvement in market access may not translate into increased Canadian exports, since Canada's production base for non-ferrous metals is not expanding. Canadian industry will likely seek to further diversify its foreign sales to include the faster growing markets, and also to increase its overall production and sales. This increase will have to come from mines outside Canada that are owned by Canadian firms. Prices for some non-ferrous commodities have shown a positive trend in 1994, and prospects are good for this trend to continue in the years to come, although a return to the high prices of the late 1980s is not anticipated.

Globally, the steel industry will grow, but slowly. The forecast is for a decrease in international trade due to an emphasis on domestic production, using the electric arc technology. This technology uses scrap as feed, which should result in the trade in iron ore and metallurgical coal. The major exception is China, which has embarked on a major expansion program for its steel industry. When Chinese steel production begins to narrow the domestic gap between production and consumption, the drop in international trade will be even more pronounced. International trade in ferro-alloys may offer better prospects for long-term growth, while the price trend for ferrous products should remain stable.

As indicated, international trade in metallurgical coal is not expected to grow in the near future, due to the increase in electric arc steel-making and the development of blast furnace technologies that use less coal. Consequently, prices are expected to remain under pressure. The prospects for thermal coal are much brighter due primarily to projected increases in thermal power generation in Asian countries. This growth will create international trade opportunities for the Canadian coal industry, but stiff competition will ensue, mainly from Australia and Indonesia. The Uruguay Round may also have an effect by establishing more subsidy discipline in Europe, bringing the closure of unprofitable mines,

especially in Germany, and creating market opportunities for exporters.

Canada has an abundance of high-quality industrial minerals, including potash, sulphur, asbestos, limestone, granite, and peat moss, which offer good prospects for increased production and exports. Prices should firm up with economic recovery, and are not expected to increase significantly in the long term because of international competition.

The challenges facing the minerals and metals industry are not limited to supply and demand, tariffs, production costs or technology. The greatest long-term challenge to industry growth may come from government regulations related to trade, environment and health issues. In pursuit of sustainable development, multilateral organizations such as the agencies of the United Nations (e.g. UNEP, ILO, IARC, CSD, ECE, IFCS), the OECD, and the GATT or World Trade Organization (WTO) and participating governments are developing policies and strategies to reduce risks associated with the production, transportation, use and disposal/recycling of chemicals. Since the definition of chemicals includes all minerals, metals and their compounds, minerals and metals are also a major target of multilateral organizations' activities.

Such activities have led, for example, to the Basel Convention and the OECD risk-reduction exercise. The outcome of such agreements and exercises may lead to the imposition of severe constraints on, or even to the outright prohibition of the production, use, or trade of commodities, their products and/or processes. These initiatives may very well have a major impact on the marketplace. While Canadian industry has long demonstrated its ability to meet the challenges of the marketplace, a strategy to respond to these new challenges will require government participation.

Traditionally, Canada, the United States and Australia have received most of the global investment for exploration. However, a number of countries, particularly those in Latin America that have good mineral potential, have recently created a more favourable environment for foreign investors, resulting in fiercer competition for mineral investment. Indeed, increasing production from Australia, and from Asian and South American countries that have recently liberalized their investment climates, will affect Canada's relative share of the world market.

The minerals and metals industry has always been very cyclical. Like other industrial sectors, it is affected by the level of economic activity. The long lead time required for projects to come on stream, typically three to five years, also limits the ability of industry to respond to changes in demand. A substantial share of production comes from developing countries, where facilities are often owned by governments that may at times pursue objectives that do not give priority to market stability. Through the creation of commodity study groups, Canada has for decades pursued a strategy of maximum market transparency to foster a more stable and orderly market.

Canadian Position

Canada's minerals and metals industry is dominated by companies that are among the world's most sophisticated and competitive in the exploration, extraction, processing, manufacturing and export of minerals and metals. The industry has long been a major contributor to the Canadian economy, not just in terms of its production, but also for the key industries that are based on its output and activities. Consequently, companies in this industrial sector typically have the resources required to support their trade promotion activities (see Table 1.)

Canada is one of the world's leading producers of primary and semi-fabricated aluminum, copper, nickel and zinc, exporting the majority of its refined non-ferrous metal production. It is also a leading exporter of coal, asbestos, elemental sulphur and potash. In 1992, Canadian steel exports of 3 million tonnes represented 4.1 percent of world exports.

Table 1 — The Minerals and Metals Industry and the Canadian Economy, 1992

Gross Domestic Product	4.2%
Employment	2.8%
Exports	16.2%
Rail and Sea Traffic	60.0%
Single-industry Communities (number of)	115
Mines (number of)	320+
Downstream Establishments (number of)	7500+

Source: Statistics Canada

Due to the global nature of metal markets, the largest Canadian non-ferrous metal producers have developed into large integrated international companies with diversified geographical interests. These companies are among world leaders in their fields in size, competitiveness, environmental protection, technology and trade. Their export markets are diversified, although the U.S. remains the largest single export market for most of them. Even with the implementation of the North American Free Trade Agreement (NAFTA), trade actions in the U.S. remain a concern.

In recent years, known reserves of major non-ferrous minerals have decreased. The industry contends that the complexity, instability and overlap in domestic environmental regulations, coupled with growing land access constraints, have made Canada less internationally competitive in mining investment. There appears to be a consensus that the current levels of expenditure on exploration are not enough to maintain long-term production. The impact on Canada's overall trade balance could be significant.

Downstream manufacturing activities are generally oriented toward domestic and continental markets. These manufacturers are typically smaller companies with a regional scope. However, this may change as access to foreign markets improves for Canada's processed and manufactured products.

Canadian ferrous producers are primarily domestic, with significant exports to the United States. Canadian steel companies do some exporting overseas, but their market is essentially North America. In spite of the NAFTA, trade actions in the U.S. have also affected the growth of Canadian exports in that market. Iron ore companies have a strong North American focus, but have also successfully exported to Europe for many years, as well as sporadically to other foreign markets.

Canada has an abundance of rich deposits of metallurgical and thermal coal, but long distances to Canadian ports will continue to present a major cost challenge to producers. Over the last two years, there has been significant restructuring in Western Canadian operations; there are now fewer operators, and they have demonstrated their ability to operate profitably in the Canadian context. As a result of the Uruguay Round, a number of heavily subsidized coal mines in Europe, especially in Germany, may create opportunities for Eastern Canadian producers and bring about an expansion of the East Coast coal industry.

Canada should remain the market leader in potash and sulphur, with low costs and abundant, high-quality reserves. The cement industry will seek to expand its presence in the U.S. market. The asbestos industry has stabilized and, while regulatory threats remain, expects to maintain its export levels. The trade performance of smaller segments of the industry, such as dimension stone and peat moss, has made remarkable gains over the last few years, and trade missions to Asia have succeeded in developing new markets.

The thrust for sustainable development and increased international cost competitiveness has pushed innovative Canadian companies to the forefront of the industry. More and more, cost competition for Canadian producers comes from developing countries. Despite Canada being a high-wage country, Canadian companies are still regarded as among the most cost-competitive producers of minerals and metals, due to better management, the development and absorption of

new leading-edge technology, and the quality of the Canadian labour force. Over the last five years, the metals industry has invested more than $1 billion in new plants and technology to meet today's environmental and productivity challenges.

The competition faced by Canadian minerals and metals companies is not limited to production costs, but also comes from substitutes and new materials. As a world leader, Canadian industry needs to actively promote the value-added benefits of its commodities, and to defend existing markets.

To meet these challenges, Canadian companies and governments are joining forces in collaborative research and development of processes, technologies and products that will minimize the environmental impact of the industry's activity, ensure that Canada remains a cost-competitive producer, and ensure that Canadian minerals and metals remain competitive in value-added benefit.

In summary, the leading international issues for the industry are:

- market access, including trade actions and regulatory frameworks, notably as they relate to the environment and health;
- market transparency and intelligence;
- cost competition from, and investment opportunities in, emerging and rapidly developing economies;
- the impact of an excess supply of metals and market disruptions resulting from exports from the FSU;
- the development and marketing of new and existing uses for products.

Strategic Direction

Market Access

The Canadian minerals and metals industry requires government support in international trade agreements and trade regulatory exercises. Specifically, the Government, in co-operation with industry, will undertake to:

- pursue a North American steel accord with the United States and Mexico, and continue to support open access to the U.S. market for the industry (Department of Foreign Affairs and International Trade [DFAIT]);
- ensure that the trade, environment and health regulatory initiatives pursued by international institutions and other countries balance environmental, health and economic considerations, and do not result in unnecessary barriers to trade or other discriminatory practices (Natural Resources Canada [NRCan], Industry Canada [IC], DFAIT);
- ensure that the conclusions of international health and environmental exercises covering the industry are based on sound science, and that they do not propose policies that could create unnecessary restrictions on the production, processing, marketing, trade, use and disposal/recycling of mineral and metal commodities (NRCan, IC, DFAIT);
- pursue technical or regulatory issues with important markets or competitors, or with countries that are potential allies or opponents on policy. The federal government, for example, places a priority on its bilateral minerals and metals working groups with countries such as the United States, Mexico, China, Korea, and with those in the EU, and on its relations with Japan (NRCan, IC, DFAIT).

Market Transparency and Intelligence

The metals and minerals industry looks to government for support in obtaining reliable and up-to-date statistical supply and demand data, market information on countries where it has not traditionally been well connected, and in providing reliable worldwide industry and market intelligence. Specifically, the Government, in co-operation with industry, will:

- support and promote international study groups with producers and consumers for major mineral and metal commodities, especially with the full participation of the FSU, especially Russia (NRCan, IC, DFAIT);

- use information networks and arrange missions to obtain accurate and timely market intelligence on other countries' supply capabilities, their scientific and technological capabilities, and investment and market opportunities. The FSU republics' aluminum, nickel and potash industries will be a major target for these activities (NRCan, IC, DFAIT);
- use Canadian bilateral minerals and metals working groups and other bilateral mechanisms to obtain market and statistical information from countries like China and the FSU republics, which may represent market competition or opportunities for Canadian industry (NRCan, DFAIT).

Trade Promotion

While the industry's large multinational companies do not generally require trade promotion support from the Government, there are segments of the industry where companies are small and do not have the resources or export experience necessary to penetrate foreign markets. Specifically, the Government, in co-operation with industry, will:

- undertake trade promotion activities in support of smaller industrial minerals producers with overseas market potential, such as the dimension stone and peat moss industries (DFAIT/missions, IC, NRCan);
- use its bilateral minerals and metals working groups and other bilateral mechanisms to obtain market information and identify export opportunities for Canadian industry. Activities will include missions, work through and with the Canadian diplomatic missions, and co-ordination with the provinces and industry organizations (DFAIT/missions, NRCan, IC);
- target activities at the Pacific Rim countries, including Japan, China and Korea, the Middle East, Mexico and Latin American countries (NRCan, IC, DFAIT).

Investment and Competitiveness

Ongoing federal government studies[1] continue to evaluate Canada's international competitiveness as a destination for foreign investment in mineral and metal processing. The Government also manages a program of international mining investment seminars to promote investment in Canada. During 1995-96, the Government, in co-operation with industry, will:

- conduct seminars in the financial centres of Pacific Rim and European countries to provide relevant information to potential foreign investors (NRCan, missions);
- monitor investment climate changes in countries that are significant competitors to Canada, to assess the need to adjust relevant domestic government policies (DFAIT/missions);
- conduct comparative studies to evaluate the evolving international competitiveness of the Canadian minerals and metals industry (NRCan, IC).

[1] Copies of these studies may be obtained from the Economic and Financial Analysis Branch, Mining Sector, Natural Resources Canada, 460 O'Connor Street, Ottawa K1A 0E4.

Equipment and Services

Canada's large minerals and metals industry has spawned a cluster of supporting industries. Initially created to service the domestic market, many of these companies have grown and become part of a major Canadian high-technology exporting industry. Products include mining, mineral exploration, technology, processing and environmental equipment and controls, and consumable products. Services are broad, from engineering, maintenance and earth sciences to surveys, analyses, transportation, software, education and training, and management.

International Environment

Internationally, Canada is regarded as a provider of technology in the minerals and metals fields. This image is particularly true for commodity producers (see the first section), in exploration services, in consulting engineering (including environmental protection), and in a number of product niches related to mineral and metal production and processing.

There is limited hard data on the size of the international markets for these industries. The world market for mineral exploration services is estimated at $2 billion. Estimates indicate that Canadian firms have about a 30-percent share of that market, and have the $300-million Canadian market essentially locked up. Canada is a world leader in several areas. One such area is airborne geophysics, in which Canada has captured 70 percent of the world market for surveys and 60 percent for equipment, software and data interpretation.

The world market for mineral and metal production and processing equipment is dominated by a handful of large firms, mostly from the United States, Sweden and Finland. This is particularly true for the very heavy equipment used for primary mineral extraction, handling and processing. Canadian firms have developed niches of excellence within this market, but do not generally offer a complete range of products for export. Exports from Canadian equipment companies are doing particularly well in South America.

Large multidisciplinary Canadian consulting engineering firms are strongly established internationally, and derive over half of their total billings from export sales.

International mining investment, including that by Canadian mining companies, is increasingly moving away from traditional destinations like Canada, the United States and Australia, toward new developing countries. These countries typically do not have a significant infrastructure of equipment and services suppliers and must rely heavily on imports, creating opportunities for exporters from more developed countries such as Canada. To prosper, Canadian equipment and services exporters must pursue these opportunities, particularly at a time when Canadian domestic exploration and mining investment are declining.

Canadian Position

The services and equipment segment of the Canadian minerals and metals industry is made up of numerous small- to medium-sized companies. Like the international markets, hard statistical data to describe the domestic industry and its performance are quite limited.

Many of the companies in this field provide equipment and services that extend beyond minerals and metals. In addition to the mining industry, they may service the oil and gas, hydro-electrical, environmental and civil engineering industries.

Suppliers to the minerals and metals segment of the industry are increasingly aware of the need to further expand their export orientation. The Canadian Association of Mining Equipment and Services for Export (CAMESE) has, for example, quadrupled its membership in the last two years. It now has over 110 members, which represents about one third of all potential exporters in Canada.

CAMESE describes the industry as consisting of a total of 600 companies, many with annual sales of less than $0.5 million and a few with sales of about $100 million. The medians per company are approximately 25 employees engaged in mining supply activities, and about $2 million in annual sales to the minerals and metals industry. Thus the industry has total sales of about $1.2 billion (approximately 7 percent of the $17-billion Canadian annual output of non-fuel minerals) and direct employment of 15 000 (15 percent of the 100 000 employed in the mining industry itself). Approximately 50 percent of the goods and services created in Canada for this industry are exported, and about half of the companies in the sector are currently exporting or producing exportable equipment and services.

The industry is widely scattered across Canada, with Ontario being the leading province, followed by British Columbia and Quebec. The companies often locate close to the mining industry, and are significant to the economies of Northern communities. The industry markets its equipment and services in Canada and in more than 50 other countries.

A number of the large Canadian-based multinational mining companies have major research and development (R&D) programs to develop advanced automation for mining. This effort is placing Canada at the leading edge of technology, and has already led to the development of a new generation of exportable equipment. Continued high levels of R&D funding, along with linkages to the equipment industry, should ensure more exportable spinoffs in the future.

Canada exports more consulting engineering services on a per-capita basis than any other country. The minerals and metals-related consulting engineering industry is a particularly strong segment of the industry. Expertise in resource projects, based on sophisticated domestic demand, gives it particular international credibility in this area.

For the largest Canadian firms in consulting engineering, export sales may represent 50 percent to 80 percent of total billings. Their global exposure provides Canadian machinery and instrumentation manufacturers with access to export markets. Among the largest firms are SNC Lavalin, Golder Associates, Monenco Agra, Acres, Kilborn, and Hatch Associates. The ability of these firms to compete internationally for large mining projects can create export opportunities for smaller Canadian equipment suppliers.

This industry sector can count on a number of strengths to expand its export performance, including:

- high levels of technology and product quality fostered by the competitive and demanding Canadian mineral and metals industry;
- competitive prices in response to the openness of the Canadian domestic market and the low Canadian dollar;
- Canada's international reputation as a technology provider and a world leader in minerals, metals and related industries;
- the export performance of the industry, with exports accounting for half of total sales;
- the opportunities for mining suppliers as Canadian mining companies expand their exploration and development activities in other countries.

The industry must also come to grips with certain weaknesses:

- there are 50 to 60 countries that are potential markets for the industry, but only the larger firms have the necessary resources to undertake a global effort.

- the Canadian market is too weak to support those that rely heavily on domestic sales.

Strategic Direction

Trade Promotion and Market Intelligence

While domestic markets for the industry are not expanding, international markets are growing rapidly. This poses a great challenge to an industry that is composed of small- to medium-sized firms with limited resources to compete on a global scale. Specifically, the federal government, in co-operation with the provinces and industry, notably CAMESE, will:

- identify foreign markets that offer the best export opportunities and should be considered priorities for trade promotion efforts (DFAIT/missions, NRCan, provinces, CAMESE);
- use information networks and formal linkages such as bilateral minerals and metals working groups to gather information on export opportunities, industry structure and practices in priority countries, and to promote the export of Canadian equipment and services (DFAIT, NRCan, IC);
- identify cost-effective ways of promoting exports (DFAIT, NRCan, IC, CAMESE);
- organize outgoing and incoming trade missions to promote Canadian exports (DFAIT/missions, IC);
- provide export training to smaller firms to help them develop their international marketing skills and strategies (provinces, CAMESE);
- ensure that Canada offers competitive financing packages in support of Canadian consulting firms bidding for large foreign mining projects (EDC, CAMESE, DFAIT).

Priority regions will include Latin America, the Asia-Pacific region and Southern Africa.

Contacts

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460 O'Connor Street
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Minerals and Metals

Activity	Date	Location	Dept.	Contact
Africa and the Middle East				
Mining Study	Apr-95	Lusaka	DFAIT	613-944-6586
Electra '95 Mission	Sep-95	Johannesburg	DFAIT	613-944-6590
Mining Mission from Southern Africa	Sep-95	Canada/Various	DFAIT	613-944-6590
Mining Mission to Southern Africa	Jan-96	Lusaka	DFAIT	613-944-6586
Asia-Pacific South				
Canada-China Ferrous Metals Working Group	Oct-95	China	NRCan	613-996-2499
Canada-China Non-ferrous Metals Working Group	Oct-95	Ottawa	NRCan	613-996-2499
Canada-Korea Mineral/Energy Working Group	10-Oct-95	Seoul	NRCan	613-996-2499
Canada				
Canada-Mexico Minerals/Energy Working Group	Apr-95	Ottawa	NRCan	613-995-9571
NRC - U.S. Bureau of Mines 10th Working Group Meeting	Apr-95	Ottawa	NRCan	613-995-9571
Western Canada Farm Progress Show - Info Booth	21-Jun-95	Regina	Manitoba	204-945-2428
APEC Coal Policy Seminar	Sep-95	Jasper	NRCan	613-992-8468
Central/Eastern Europe and the Commonwealth of Independent States				
Kazakhstan Mining Show - National Stand	Jun-95	Almaty	DFAIT	613-992-8590
Forestry, Food, Mineral Products Mission	Jun-95	Moscow	DFAIT	613-996-6429
East Asia				
Canada-Korea - Third Markets Study	May-95	Seoul	DFAIT	613-996-2807
Canadian Architect/Designer Mission	Jun-95	Taipei, Taichung	IC	613-954-2956
Coal Mission from East Asia	10-Sep-95	Toronto	DFAIT	613-995-8744
Mineral Investment Seminar	10-Oct-95	Seoul	DFAIT	613-996-2807
International Geological Congress - National Stand	Aug-96	Beijing	DFAIT	613-996-6987
Latin America and the Caribbean				
Tecnomin '95 - National Stand	Apr-95	Lima	DFAIT	613-996-4199
National Mining Congress - National Stand	Oct-95	Acapulco	DFAIT	613-995-8742
International Copper Study Group (3rd General Session)	23-Nov-95	Santiago	NRCan	613-992-4093
CAMESE Mission	Dec-95	Mexico	DFAIT	613-995-8742
Prospectors and Developers Mission from Venezuela	Mar-96	Toronto	DFAIT	613-996-5548

Activity	Date	Location	Dept.	Contact
Multiple Markets				
Minerals and Metals Investment Seminars	TBD	Europe, Asia	NRCan	613-992-5873
Working Group of Experts on Aluminium	Spring 95	Oslo	IC	613-954-1854
International Lead/Zinc Study Group (ILZSG)	01-Apr-95	London	NRCan	613-992-4403
International Copper Study Group (ICSG)	20-Jun-95	Lisbon	NRCan	613-992-4482
Powder Metallurgy - TEC '95 World Congress (Conference)	14-May-95	Seattle	IC	613-954-3118
International Lead/Zinc Study Group (ILZSG)	27-Oct-95	Geneva	NRCan	613-992-4403
International Copper Study Group (ICSG)	Nov-95	Santiago	NRCan	613-992-4482
United States				
Dimension Stone Mission	Mar-95	California	B.C.	604-844-1912
Empire Farm Days	Aug-95	Buffalo	DFAIT	613-944-5149
American Institute of Architects - Trade Show - National Stand	Nov-96	Minneapolis	DFAIT	613-944-7486
Western Europe and European Union				
Canada-EU Metals and Minerals Working Group	Apr-95	Brussels	NRCan	613-995-2096
International Nickel Study Group (INSG)	25-Apr-95	The Hague	NRCan	613-992-4481
OECD Steel Committee	10-May-95	Paris	IC	613-954-1488
Mission-Agricultural Machinery (Tech Transfer)	Nov-95	Hannover, Paris	IC	613-954-3226
OECD Steel Committee	28-Nov-95	Paris	IC	613-954-1488
Outgoing Mission - Agricultural Machinery	Nov-95	Hannover, Paris	IC	613-954-3226
Oceanology International '96 - National Stand	Mar-96	Brighton	IC	613-954-3398
International Nickel Study Group (INSG)	02-Nov-95	The Hague	NRCan	613-992-4481

Acronyms and Initialisms Used in The International Trade Business Plan

(This list does not include sector-specific references)

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

Government of Canada Gouvernement du Canada

Canada