3 AIRCRAFT AND PARTS

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
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11. Defence Products
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    - 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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Aircraft and Parts

The aircraft and parts sector comprises firms that design, develop, manufacture and/or market aircraft, aircraft systems, subsystems and parts, as well as those that provide support services such as repair and overhaul (R&O).[1]

As shown in Figure 1, the aircraft and parts industry has a three-tier structure. Aircraft manufacturers with a full systems-integration capability make up the first tier. Second-tier firms produce integrated systems, including propulsion systems, landing gear and major structural components such as wings, tail sections and fuselage sections. Third-tier firms manufacture aircraft parts and components and provide support services. First- and second-tier companies are often represented by local sales staff or agents in export markets, and are generally aware of market conditions and opportunities. Third-tier suppliers market to the first- and second-tier companies, as well as to end users.

The lines shown in this traditional depiction of the aircraft industry are beginning to blur, however, as airframe manufacturers demand that their suppliers assume responsibility for designing, developing and manufacturing complete integrated systems, and that they share the financial risk of the aircraft program. This approach has broadened technological requirements, increased financial risks and given rise to issues of market access. The strategic response from systems suppliers wishing to offer integrated systems has been to form global partnerships or alliances with a number of subsystems manufacturers.

Figure 1 — Aeronautics Industry Tier Structure

Source: Industry Canada

Table 1 — Share of World Exports and Imports - 1992: Aircraft, and Associated Equipment and Parts

Exporter	Share (%)	Importer	Share (%)
United States	40.7	United States	14.2
United Kingdom	17.6	France	13.0
France	12.3	Germany	7.6
Germany	10.7	United Kingdom	7.0
Canada	3.2	Japan	4.9
Italy	3.2	Canada	3.1
Netherlands	2.6	Netherlands	2.9
Japan	1.1	China	2.7
Spain	1.0	Republic of Korea	2.6
Belgium-Luxembourg	0.9	Italy	2.3
Sweden	0.7	Singapore	2.0
Switzerland	0.7	Australia	1.9
Former Soviet Union	0.7	Spain	1.6
Singapore	0.6	Saudi Arabia	1.5
Brazil	0.3	Taiwan	1.3
Denmark	0.3	Mexico	1.3
Israel	0.2	Thailand	1.3

Source: Statistics Canada, World Trade Databases on CD-ROM, 1980-91 and 1992, Aircraft and Associated Equipment and Parts. As statistics for aircraft engines are not normally included in this category, a special analysis was carried out to include engine data.

[1] Avionics is covered in the section entitled Defence Products.

International Environment

In 1992, Canada ranked fifth in the world in exports of aircraft and parts, with a 3.2-percent share. Canada's aerospace output has been growing more rapidly than that of other leading aerospace countries since the mid-1970s (see Figure 2).

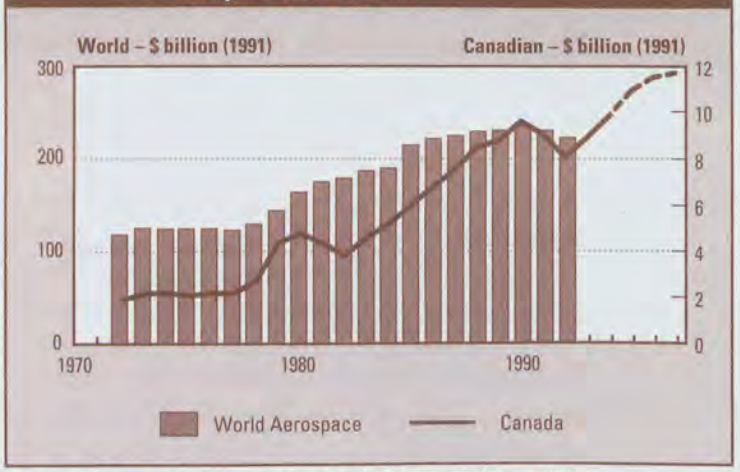
From 1989 to 1991, airlines and aircraft-leasing companies placed orders for new aircraft at an unprecedented rate. As a result of the decline in travel during the recession, airlines experienced enormous financial losses, and demand for new civil transports plummeted.

Observers continue to forecast strong underlying demand for civil transports over the next 15 years, although generally below the peak levels attained in 1991. In contrast to the long-term prospects for civil aircraft markets, however, the downsizing of the defence industry is expected to be permanent as the East-West arms race winds down. In previous business cycles, downturns in civil aerospace were buffered by defence spending. In the face of intense competition in both civil and defence markets, aircraft companies and their suppliers must become more efficient and cost-competitive, while maintaining their technological edge. This will require the formation of new relationships that were unfeasible previously, due to such factors as national security interests, competitive risks and protected technologies.

These factors are expected to lead to a major worldwide restructuring of the aircraft and parts industry. Restructuring is expected to be most profound in the highly fragmented regional aircraft-manufacturing industry, a segment in which Canada has a strong competitive position. Bombardier has led this restructuring with its acquisition of de Havilland and the integration of its Canadian operations into its international aerospace interests.

Many governments consider the aircraft industry to be particularly important to their economic and industrial policy, and therefore offer a range of direct and indirect support. In addition, governments of Eastern Europe, China and other countries often insist on industrial offsets or "localization" of production, in return for market access. Localization requirements can, in many cases, be satisfied by low-technology work, maintaining or increasing high-technology work in Canada by increasing market share.

Figure 2 — Canada's Aerospace Sector: Growth Compared to World



Source: European Aerospace Industry: Trading Position and Figures 1994

Over the past year, several countries have provided equity or other special funding to maintain their aircraft industry in the face of financial losses. Several European countries have strengthened their indirect research and development funding for the aircraft industry, and the United States has initiated defence conversion programs aimed at "dual-use" (military/civil) technologies. During the Uruguay Round of the General Agreement on Tariffs and Trade (GATT) negotiations, countries were unable to negotiate improvements to the 1979 Agreement on Trade in Civil Aircraft, which eliminated tariffs and limited offsets between signatory countries. Negotiations on the aircraft agreement were decoupled from the Uruguay Round agreement and are continuing.

International market prospects for the R&O subsector are generally better than for its manufacturing counterpart. In the short term, airline overcapacity is leading to storage of functional

aircraft. Used aircraft prices are declining as a result, providing a basis for economic conversion or upgrading of the aircraft to meet new environmental and safety regulations and improve operating costs. Over the longer term, the world's airline fleet is expected to grow substantially and the expanded fleet will require R&O support. In the United States, military R&O opportunities are expanding as military bases and repair centres are closing and R&O is increasingly being contracted out to the private sector.

The major area of growth in demand over the next few years is expected to be the Pacific Rim. British Aerospace, for example, predicts that defence spending in the Asia-Pacific region will overtake that of Western Europe and equal approximately two thirds of U.S. spending by 2010. Meridian International Research forecasts that the total market in the Asia-Pacific region from 1993 to 1998 will be in the range of 500 aircraft, of which 69 percent will be between 50 and 100 seats, and 23 percent between 25 and 40 seats. Many of these countries are also expected to use their foreign exchange surpluses to encourage the development of their aircraft and parts industries to meet growing demand. Securing market access may require local production, technology transfer or other industrial offsets.

China is expected to experience rapid growth in its gross domestic product (GDP), which will stimulate demand for air travel. However, constraints on the rapid expansion of China's aviation infrastructure are expected to slow the recent 30-percent annual growth rate in air travel to 16 percent between 1993 and 1999.

Former Warsaw Pact countries have advanced aircraft and parts technologies, along with highly skilled, well-trained, low-paid workers, technologists and engineers. However, their ability to organize, manage and market these assets competitively remains questionable. Russia's aircraft industry is focussing on improving its aircraft to the standards required for certification in Western countries, and is eager to collaborate with Western firms that can assist in this effort. The most immediate opportunities in these countries are in technological collaboration, but more substantive trade opportunities are longer term.

Canadian Position

The Canadian aircraft and parts industry exports 64 percent of its $5.5-billion annual sales and employs approximately 40 000 people. In 1992, the aircraft industry's value-added performance was third among all Canadian manufacturing sectors, behind the motor vehicle and sawmill industries. The industry's success has been built on establishing "niches of excellence" in selected commercial and defence markets. This strategy has been applied in virtually every subsector in the industry.

Canada's aerospace[2] industry focusses primarily on civil markets, which accounted for 69 percent of its sales in 1992. Most of its foreign competitors depend on military markets for 50 to 70 percent of sales. Although Canada's aircraft and parts industry has not been as directly affected by declining defence budgets as those of its competitors, it is facing increased competition in civil markets as defence-oriented foreign aircraft and aircraft parts firms begin to redirect their production efforts.

Canada's aircraft and parts industry is internationally competitive. Since 1988, it has been one of the few Canadian high-technology industries to show a cumulative trade surplus. Indeed, in 1992, Canada was the only nation in the world to register a trade surplus with the U.S. in aerospace products.

The U.S. is the principal market for Canada's helicopters, fixed-wing aircraft, engines and engine parts, and aircraft parts and components, followed

[2] Based on aerospace data. The civil/military ratio is not available for aircraft and aircraft parts.

by Europe, particularly for engines and engine parts, and the Asia-Pacific region, which, although currently small, is an emerging market for Canada's fixed-wing aircraft and helicopters.

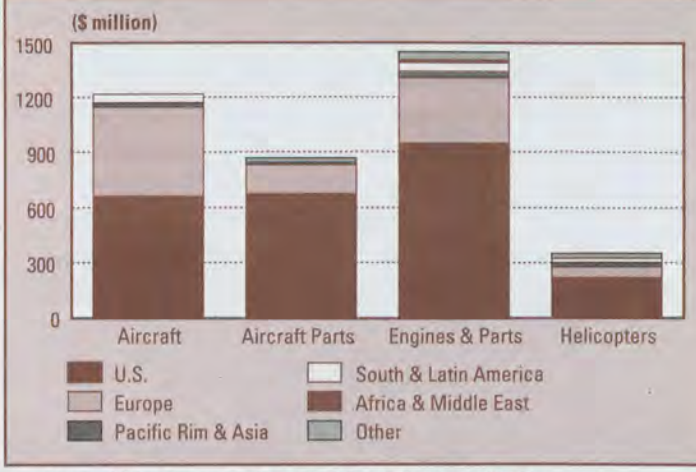
During 1993, exports of aircraft and engines resumed their growth, and helicopter exports rebounded after a small decline the previous year (see Figure 3). Exports of aircraft parts, however, continued to decline sharply, as the large aircraft industry, the primary market for Canada's aircraft parts manufacturers, continued to reduce production (see Figures 4 and 5).

Bombardier, the parent company of Canadair and de Havilland, is a major Canadian-controlled global aircraft manufacturer. Canadair and de Havilland have the largest world market share of deliveries and orders in 30- to 50-seat turboprops and jets. Canadair's Challenger is one of the best-selling large corporate jets in the world; this, together with the Learjet line, gives Bombardier the broadest product line of any business jet manufacturer. The company also manufactures and markets the CL-215T/415 water bomber, as well as military versions of this amphibian aircraft. In co-operation with international risk-sharing partners, Bombardier is developing a new long-range executive jet, the Global Express. It is also developing a new, longer-range, enhanced version of the Challenger, the 604, and, with its affiliated companies, Shorts and Learjet, the Learjet 45 business jet. Bombardier is working on a new high-speed turboprop, the Dash 8-400, and a 70-seat variant of the Canadair Regional Jet. In addition, it designs and manufactures advanced surveillance systems, including the CL-289 drone and the CL-227 Unmanned Air Vehicle, and manufactures large aircraft parts, under subcontracts, for civil and military markets.

Bell Helicopter Textron (Canada) designs, develops, manufactures and markets Bell's entire line of civil helicopters, including the 206-BIII JetRanger, 206L-IV LongRanger and 206 TwinRanger light helicopters; the 230 intermediate twin helicopter; and the 212 and 412 medium lift helicopters. Bell is currently developing the 430 intermediate helicopter and the 407L and 407LT light helicopters. It has almost 50 percent of the world commercial helicopter market for its products.

Pratt & Whitney Canada has a 30-percent share of the world market for small turbine engines (used by regional aircraft, general aviation, military utility/trainers and helicopters), and is well positioned to realize its goal of expanding that share to 40 percent in the coming decade. Its products include the PW100, PW200, PW300, PT6 and JT15D series of turbine engines and the PW900 series of auxiliary power units.

Figure 3 — Canada's Aeronautics Exports, 1993

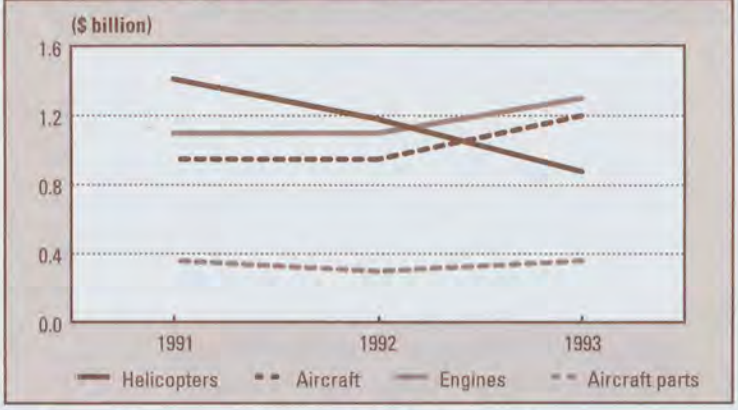


Source: Midas System and Statistics Canada Catalogue 65-004

Figure 4 — Aircraft and Parts Balance of Trade

Source: Statistics Canada TIERS Data, HS Basis

Figure 5 — Exports by Product



Source: Midas System and Statistics Canada Catalogue 65-004

Second-tier subsystems and subassembly manufacturers have a range of specialized capabilities. For example:

- Dowty, Menasco and Heroux design, develop and manufacture landing gear;
- Allied-Signal designs and manufactures engine controls and aircraft environmental systems;
- McDonnell Douglas Canada Limited produces the wings for all the Douglas Aircraft Company's large commercial aircraft and some military models, and is actively seeking to broaden its customer base;
- Boeing Canada manufactures composite airframe structures.

In the third tier, several smaller firms manufacture aeronautics components and/or subassemblies, primarily for domestic markets. A few highly specialized third-tier companies, such as Mecair (aerospace fasteners), Novatronics (aircraft position and motion sensors) and Aerosystems International (aircraft engine testers and monitors), are active exporters.

Canada's repair and overhaul subsector has sales ranging from $1.6 billion to $2 billion, and employs 12 000 to 14 000 people.[3] Exports are lower than those of the aerospace industry as a whole, ranging between 25 and 30 percent, yet they play a significant role. Canada has a complete range of R&O capabilities, including aircraft re-engining, engine overhaul, refurbishing aircraft interiors, and aircraft modification and conversion services. Several firms have highly competitive capabilities for the repair, overhaul and support of specific military airframe platforms, such as the CF-5 and the CF-18. The sector is shared equally between aerospace firms and fixed- and rotary-wing aircraft operators. Through the Defence Production Sharing Arrangement/ Defence Development Sharing Arrangement (DPSA/DDSA), Canadian industry has an enhanced opportunity to access the U.S. military R&O market. Canadian R&O companies include: Rolls-Royce Canada (carrying out research and development [R&D] for the industrial version of the Trent engine in Canada), Hawker Siddeley (Orenda), Standard Aero, Bristol Aerospace, Heroux, Air Canada, Canadian Airlines International Limited, Conair, Kelowna Flightcraft, Field Aviation, IMP, Canadair and CAE Aviation. In addition, Conair and Canadair provide complete forest fire control systems and services to complement their firefighting aircraft.

Canadian firms also produce light general aviation aircraft, mostly for the private pilot, recreation and flying school markets. Many observers believe that there is a demand for these products because of safety issues and spiralling product liability costs. New certification requirements for factory-built light general aviation aircraft were introduced in Canada in 1993. New product liability legislation, which received presidential approval in the United States in August 1994, may both stimulate market growth and jeopardize Canada's lead in this market. A number of firms also produce ultra-light aircraft for the recreation market.

[3] The repair and overhaul industry is not well defined from a statistical perspective. Consequently, the data cited herein are estimates and reflect some duplication of aircraft and parts production and exports, as well as some elements of aircraft operators' sales.

The competitive strengths of Canada's aircraft and parts industry are rooted in its conversion from defence to commercial production during the 1960s, and the strong international focus that it developed to compensate for its limited domestic market. Through specialization, Canada's aircraft and parts industry has achieved a leadership position in some niche markets for specialized aircraft and systems, largely in commercial sectors. Many foreign firms are seeking to emulate Canada's success in penetrating foreign commercial aircraft and parts markets as their protected domestic defence markets shrink.

The federal government has fostered the growth of the industry through a stable, supportive policy environment. Industry Canada's (IC) Defence Industry Productivity Program (DIPP), which principally supports R&D projects, and its Industrial and Regional Benefits (IRB) program for defence procurements, have been key to the Government's support of the industry. Flexibility in export financing for aircraft and parts is also becoming increasingly important. In 1993, Canada's Export Development Corporation (EDC) provided $1.6 billion in financing for the aircraft and parts sector (amounting to 40 percent of its 1993 signings).

Strategic Direction

Canada's aircraft and parts industry will continue to face difficult challenges in the 1990s. Key among them are shrinking defence markets and highly cyclical commercial markets. Canadian firms are not as large as most of their international competitors, nor do they have protected domestic markets and direct government investment. Moreover, the industry faces new competition from countries that are developing their aircraft sectors as a key element of their industrial development strategy, and from technically proficient former Soviet Union (FSU) aircraft industries seeking to penetrate Western markets. In this environment, Canadian aircraft and parts firms will be challenged, more than ever, to maintain a global view of their industry and to develop their strategies within this context. The strategic priorities for the industry are as follows:

- **Aerospace Industries Association of Canada (AIAC) Priority Countries**

  The AIAC continually reviews and updates a list of countries that will be targeted for sales support by Canada's embassies and consulates. The current list includes countries with indigenous aircraft design and/or manufacturing capability, and those with particular or expanding air transportation markets. In order of priority, the major markets are: the United States, France, Germany, United Kingdom, Commonwealth of Independent States, Italy, China, Japan, Korea, Taiwan and Turkey. Other prospective markets include Indonesia, Singapore, the Netherlands, Sweden and the Middle East. Market intelligence on the current and future aerospace plans of these countries is essential for Canadian aerospace companies to be able to compete.

  Canadian missions abroad and provincial governments have expressed interest in pursuing Latin and South American markets. Government and industry will carry out a market review to ensure that development and support activities in these markets are effective (AIAC, Department of Foreign Affairs and International Trade [DFAIT], IC).

- **Marketing Support**

  In view of the close relationship between the aircraft industry and governments worldwide, embassies and consulates will provide aerospace companies with strategic marketing information and support on government-related issues.

  Industry and government will co-operate to identify the nature, content, frequency, format and dissemination procedures for such information, and to implement appropriate processes (AIAC, DFAIT, IC).

- **Local Liaison with Key Contacts**

  Embassies and missions maintain contact with a limited number of key government agencies

or domestic prime contractors vital to this sector. These key contacts will be identified in co-operation with industry (DFAIT/missions, AIAC).

- **Market Imperfections**

  Little progress is expected on a new GATT agreement on civil aircraft until the United States and the European Union break their current deadlock. Should negotiations begin again in earnest, the Government will consult closely with the aircraft industry in developing its negotiating position (DFAIT, IC, AIAC). In the meantime, embassies and consulates will monitor and report on international subsidy programs and non-tariff barriers (DFAIT/missions, IC).

- **Monitoring Developing Technologies**

  Countries with established or rapidly emerging aircraft capabilities are developing new technologies that may affect Canada's aircraft industry, including:

  - Artificial Intelligence,
  - Robotic Systems,
  - Surveillance Technology,
  - Smart Sensors,
  - Intelligent Structures,
  - Smart Systems,
  - New Person/Machine Interfaces,
  - Fault Tolerant Electronic Systems,
  - Optronics,
  - Computational Fluid Dynamics,
  - Computational Structural Mechanics,
  - Lightweight Materials and Structures,
  - Advanced Protective Coatings,
  - Advanced Manufacturing Technologies, and
  - Multidisciplinary Design and Optimization.

  Industry and government will work together to develop and implement a monitoring and reporting process for key countries that focusses on these technologies. In addition, they will consider the merits of forming strategic alliances with U.S., European and/or Japanese firms in these fields, and will recommend whether broadened intra-national research program collaboration would further their interests (AIAC, DFAIT, NRC, IC).

- **New Long-term Markets**

  Prospects for growth in aeronautics are high in the People's Republic of China, and Canada's competitors are already active. Industry will explore opportunities for collaboration with Taiwanese and Japanese aerospace firms.

  In the FSU and Eastern Bloc, the potential access to advanced technologies and, in the longer term, prospective markets, is balanced by the risk of pursuing unproductive, or very long-term opportunities. Missions will maintain a close watch on aerospace developments. DFAIT will continue to support business associations such as the CUBC, which forges business-to-business contacts between industries in the FSU and Canada (DFAIT, IC).

  Missions will support the industry's efforts to penetrate Middle Eastern markets to take advantage of opportunities to market helicopters, regional aircraft, executive jets (particularly the Global Express), repair and overhaul, and support services (DFAIT/missions).

  In each of these new long-term markets, the primary role for embassies and consulates will be to provide market intelligence and to arrange for ministerial support (DFAIT/missions).

- **Strategic Alliances**

  As aircraft manufacturers are demanding fully integrated systems for new aircraft, forming strategic alliances with firms with complementary capabilities is becoming essential to offering systems solutions. In addition, strategic alliances are frequently necessary for market access in emerging new markets. The Government will support the efforts of companies, particularly small- and medium-sized enterprises (SMEs),

to form strategic alliances with aircraft and parts manufacturers, both domestic and foreign (IC and DFAIT).

- **Repair and Overhaul**

  Embassies and consulates will continue to report major modification programs for military airframes and civil aircraft redesign or refurbishment programs. Particular emphasis will be placed on U.S. military markets and on matching Canadian industry strengths on specific airframe platforms and identified foreign market opportunities for these platforms (DFAIT/missions, IC).

Promotional Activities

In view of Canada's stature as a world leader in aircraft and parts manufacturing, the Government will centre its promotional activities around a few strategically important international air shows as a showcase for Canada's capabilities. Specifically, it will be part of the consolidated Canadian presence at the Singapore and Paris (and, in alternate years, Farnborough) air shows. Aircraft and parts missions may be linked to these trade shows to enable SMEs to visit specific companies of interest. Support for other air shows and outgoing trade missions will be founded on specific aircraft marketing, development, conversion, or life-extension programs and similar targeted market opportunities. Airshow Canada, the leading North American air show, is a particularly important venue for Canada's trade development efforts, and will be used to provide an opportunity for foreign customers to travel on to visit Canadian firms to see their capabilities (DFAIT, IC).

While the Government will continue to support a limited number of these trade development activities, it also recognizes that, as the aircraft industry is becoming increasingly globalized, access to timely market and technology information worldwide is becoming more and more vital. Accordingly, as the processes to provide industry with market and technology information become more fully developed (outlined in Strategic Direction), the Government will direct more of its resources to this effort (DFAIT, IC).

References

The European Commission, *The European Aerospace Industry, Trading Position and Figures, 1994*, Brussels.

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Midas System and Statistics Canada Catalogue 65-004, *Aircraft and Aircraft Parts Trade*, Harmonized System (HS) Basis.

Contacts

Industry Canada
Aeronautics Branch
235 Queen Street, 6th Floor East
Ottawa K1A 0H5
Tel.: (613) 954-3343
Fax: (613) 998-6703

Department of Foreign Affairs
and International Trade
125 Sussex Drive
Ottawa K1A 0G2
Tel.: (613) 996-8086
Fax: (613) 944-0050

Aircraft and Parts

Activity	Date	Location	Dept.	Contact
Africa and the Middle East				
Dubai Air Show 1995	Nov-95	Dubai	DFAIT	613-944-6983
Canada				
ASEAN Market Opportunities Seminar	11-Jun-95	Montréal	IC	514-283-4262
Airshow Canada '95 - Canada Stand	09-Aug-95	Abbotsford	IC	613-954-3748
East Asia				
Taipei Aerospace Technology Exhibition - National Stand	Jul-95	Taipei	DFAIT	613-995-8744
Airshow Canada '95 - Visitors from China and East Asia	09-Aug-95	Abbotsford	DFAIT	613-995-6962
Multiple Markets				
Airshow Canada - Visitors from Latin America	09-Aug-95	Abbotsford	IC	514-283-8883
United States				
Mission to Werner-Robbins Air Force Base	Apr-95	Macon	DFAIT	613-944-9481
Mission to Defence Contractors	May-95	Los Angeles	DFAIT	613-944-9481
Advance Plan Brief for Industry	May-95	Chicago	DFAIT	613-944-9481
National Business Aircraft Association - National Stand	Oct-95	Atlanta	DFAIT	613-944-9481
USAF Plant Visits - Eastern Canada	Nov-95	Dallas	DFAIT	613-944-9481
Mission to U.S. Coast Guard	Nov-95	Atlanta, Philadelphia	DFAIT	613-944-9481
Canada Day - Wright Patterson Air Force Base	Jan-96	Dayton	DFAIT	613-944-9481
Heli-Expo '96	30-Jan-96	Anaheim	IC	613-954-3400
Mission to CASL	Feb-96	St. Louis	DFAIT	613-944-9481
CANEX '95	Feb-96	Philadelphia	DFAIT	613-944-9481
Western Europe and European Union				
MI/I Report - MR&O (Maintenance, Repair and Overhaul)	Jun-95	Dallas	DFAIT	613-944-9481
Airshow Canada - Visitors from Western Europe	09-Aug-95	Abbotsford	DFAIT	613-996-3607
Thessaloníki International Trade Fair - Info Booth	Sep-96	Thessaloníki	DFAIT	613-995-6435

Note: Dates and locations are subject to change.

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