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
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   - Footwear
   - Sporting Goods (including recreational watercraft)
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    - 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

Chemicals

The chemicals industry makes more than 60 000 products from a wide range of metals, minerals, crude oil, natural gas, vegetable oils, animal fats and other raw materials. These products include commodity inorganic and organic chemicals, resins, elastomers, fertilizers and crop protection chemicals, fine and specialty chemicals as well as pharmaceuticals, paints and varnishes, soap and cleaning compounds.

Chemicals, in general, fall into two categories, basic (or commodity) and specialty chemicals. Basic chemicals are traded globally and rely on the supply of feedstock and manufacturing economies. Specialty chemicals, on the other hand, are more narrowly focussed geographically, have higher value-added, and require greater service and distribution support.

International Environment

Chemicals represent a major global industry that accounts for a significant share of foreign direct investment and international trade. Global chemicals production in 1993 was estimated at US$1500 billion. During the past 10 years, world chemical production has increased at an annual average rate of about 6 percent. The U.S. chemical industry is the world's largest, followed by Japan, Germany and France. Canada ranks as the tenth-largest chemical manufacturer.

Trade in chemicals is fiercely competitive, with producers active on a global scale. Total world exports of chemicals amounted to about US$325 billion in 1993. Germany was the largest exporter, followed by the United States. About 20 multinational enterprises (MNEs) account for 25 percent of worldwide sales.

Having developed significant petrochemical capacity over the past decade, Middle Eastern countries are now competing with traditional petrochemical exporting countries, such as the United States, Canada, Japan and those of Western Europe. Newly industrialized countries such as South Korea and Taiwan are also developing domestic chemical capacity to satisfy the needs of growing local markets and to take advantage of export opportunities. The Asia-Pacific region is expected to be the world's fastest-growing chemical market.

Globalization has precipitated an ongoing restructuring of the industry, particularly within Europe and North America. Competition is also increasingly organized along the lines of the three emerging trading blocs: North America, Western Europe and the Asia-Pacific region.

The following factors are having a major impact on the world chemicals industry:

- increasing competition and trade liberalization arising from the Canada-U.S. Free Trade Agreement (FTA), the North American Free Trade Agreement (NAFTA) and the General Agreement on Tariffs and Trade (GATT);
- growing public concern about the environment, with respect to the production, marketing and disposal of chemical products, and the resulting demands for new environmentally friendly products and technologies in Europe, North America and Japan;
- changing industry dynamics and product definitions as a result of the evolution of science and engineering and the development of new products that cut across many disciplines;
- continentalization and globalization of industry — individual firms are less likely to grow and prosper without the benefit of mutually reinforcing supplier capabilities and/or close competitors and external innovation catalysts within their domestic or continental industrial cluster;
- the trend among developed economies to emphasize more sophisticated value-added products within the chemicals sector;

- competition among various units within MNEs for the right to product mandates for certain products.

Canadian Position

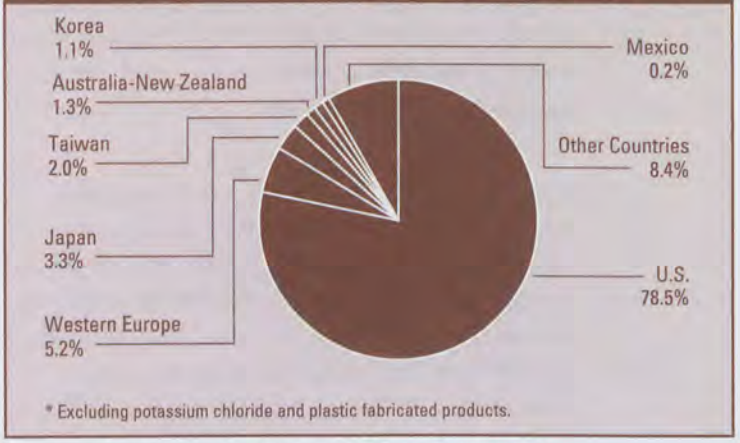
Based on the value of shipments ($22.5 billion in 1993, representing about 7.2 percent of total manufacturing shipments), chemicals represent Canada's third-largest manufacturing sector. In 1992, employment in the sector was approximately 91 000 — about 5.4 percent of total manufacturing employment. It also ranked third in terms of value-added.

Imports and exports in 1993 totalled $11.9 billion and $7.5 billion respectively. Imports represented 44 percent of the domestic market and were composed largely of specialty and formulated chemicals tailored for specific end uses and pharmaceuticals. Exports were primarily commodity products and accounted for 33 percent of factory shipments. Overall, the United States accounted for 77 percent of Canada's imports and received 78.5 percent of our exports (see Figure 1).

In terms of trading patterns, from 1985 to 1993, imports increased from about 29 percent of the domestic market to about 44 percent. Exports grew from 24 percent of factory shipments to 33 percent for the same period. Thus, the industry has significantly increased its dependence on imports to satisfy domestic requirements.

Canadian-owned firms, with some notable exceptions, tend to be small and primarily serve niche markets. For the smallest companies, production is still geared to domestic (often regional) markets. Canadian producers, however, are now beginning to take advantage of the opportunities arising from the FTA, a trend likely to continue with the NAFTA. Many larger MNEs have already rationalized their operations in terms of the larger North American market, resulting in the closure of some Canadian branch plants, and in other cases, expansion to supply North American markets from Canada. There

Figure 1 — Canada's Principal Export Markets* for Chemicals and Chemical Products, 1993 (% of Total)



* Excluding potassium chloride and plastic fabricated products.

Source: Statistics Canada, tabulation from Tradesys Tape, July 1994

is concern that rationalization of the Canadian chemical industry has resulted in some loss of autonomy in decision making, as well as the disappearance of some key technical, marketing and management positions from the country.

Compared to their international competitors, Canadian chemical companies have generally tended to be driven by a short-term cost focus as opposed to a long-term innovation focus. There is also a tendency for Canadian companies to be production-oriented, placing insufficient emphasis on global marketing; this is particularly true for small- and medium-sized companies.

Canadian commodity chemicals, particularly the ammonia and petrochemicals subsectors, are highly competitive due to the availability of competitively priced oil and gas. The fertilizer sector is also globally competitive and has a favourable trade balance. In the case of specialty and fine chemicals, however, a large number of proprietary products are imported. In many cases, the Canadian market alone is not large enough to justify production and the sector has not been significantly restructured to supply the larger North American market from domestic facilities. Also, producers frequently rely on raw materials and specialized components that are not readily available in Canada. Overall, Canada has a net

trade deficit for specialty and fine chemicals of about $1.5 billion.

Nevertheless, the specialty chemicals subsector does support a large number of MNEs as well as many small- and medium-sized enterprises (SMEs), most of which are Canadian-owned. These firms typically have been producing a relatively extensive range of products, in small quantities, almost exclusively for the domestic market. The FTA, however, provides these companies with an opportunity to develop and sell their product lines to a much larger market. In fact, companies should view the United States, particularly the northern states, not as a foreign market but as an extension of their domestic market. These companies will face pressure to rationalize their product lines to become lower-cost producers. As well, given that specialty chemicals are knowledge-based, the sector must look to rapidly adopt new technologies through technology transfer arrangements.

Research and development (R&D) in the Canadian chemicals sector has been limited, in part, by the influence of multinational firms. The existence of high tariffs prior to the FTA made licensing of technology much more cost-effective than carrying out R&D. As a result, there has been an inevitable bias toward acquiring off-the-shelf technology, as opposed to developing it in Canada. However, the current 20-percent non-refundable tax credit available to Canadian companies and the provisions of the Scientific Research and Experimental Development Program (e.g. a fully refundable tax credit of 35 percent up to $2 million for qualified Canadian-controlled private companies) have established a favourable taxation climate in Canada, which, in some cases, is more favourable than in any other developed country. Senior executives of Canadian operations for MNEs must emphasize to their corporate headquarters the attractiveness of carrying out R&D in Canada, while SMEs should consider this program as a means of innovation for competitive advantage.

With the expected reduction in trade restrictions over the next five years, the chemicals sector can expect further changes as MNEs implement their global rationalization strategies. Such restructuring should leave their Canadian operations globally competitive. Suppliers to MNEs will also be forced to achieve global competitiveness, if only to maintain domestic accounts in a market that is open to more foreign competition. The growth potential of SMEs will also depend upon their ability to capture new export markets.

Strategic Direction

Government, in partnership with industry, will work to:

- support and encourage SMEs to be proactive in developing potential export markets and forging strategic alliances;
- continue to identify niche markets such as specialty chemicals and provide timely market information to facilitate exporting by smaller firms;
- encourage companies to be innovative through increased commitment to R&D, both in-house and through the network of technology counsellors in Canadian embassies, to acquire leading-edge technologies;
- encourage companies, particularly SMEs, to form strategic alliances with suppliers, customers and others and to participate in mutually beneficial business networks to secure markets for their products and to stay informed of emerging opportunities;
- encourage industry to invest in productivity enhancement measures to maintain international competitiveness independent of currency fluctuations.

Action Plan

To achieve the strategic direction outlined above, the following specific activities are proposed:

- initiate action to designate an officer in the Canadian Embassy in Mexico to assist in resolving problems encountered by Canadian

chemical companies (Department of Foreign Affairs and International Trade [DFAIT], Industry Canada [IC]);

- investigate the possibility of positioning a chemical specialist in one of the Canadian missions in the United States (DFAIT, IC);
- arrange, in co-operation with the provinces, more incoming technology missions from countries other than the United States (DFAIT, IC, provinces);
- provide key missions with the information they need to actively pursue the acquisition of new technologies needed in Canada (DFAIT, National Research Council [NRC], IC);
- evaluate the competitive effects of new chemical substances notification resulting from differences in CEPA and TOSCA (U.S.) regulations (IC, Environment Canada [EC], DFAIT);
- develop a directory of consultants in selected foreign countries (for chemicals) to assist SMEs in identifying qualified local consultants (DFAIT, IC);
- update and distribute a directory of Canadian trading houses specializing in exporting chemicals (DFAIT, IC);
- investigate use of Program for Export Market Development (PEMD) funding to hire consultants for foreign market research prior to committing to market development strategies for a chosen area (DFAIT, IC, provinces);
- offer workshops to sensitize and encourage smaller chemical companies to export (DFAIT, IC);
- organize chemicals-specific New Exporters to Border States (NEBS) missions to the United States (DFAIT).

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Plastics

The plastics sector is composed of manufacturers of synthetic resins, compounders of resin, and processors that make plastic products. Plastics machinery is discussed in the Advanced Manufacturing Technologies chapter of the International Trade Business Plan.

International Environment

Demand for synthetic resins gained strength in North America in 1994, remained strong in Asia, but continued to be sluggish in Europe. As demand in North America improved, price increases became sustainable.

Plastic products do not typically compete in the same global markets as resins. Markets for most products are much more regional, and are mainly North American. In 1994, North American demand for plastic products rose significantly as the overall economy expanded.

During 1994, polyvinyl chloride (PVC) resin and products showed the best gains, reflecting the dominant position of PVC resin in the construction and automotive sectors, both of which experienced significant growth during the year. The growth in PVC consumption occurred at the same time that resin and its products underwent increased environmental scrutiny in North America, along with all chlorine-based technology. The industry is currently working with governments to assess the life-cycle impacts of PVC and its precursors on the environment.

Canadian Position

Resin production is dominated by multinational enterprises (MNEs) including Novacor, Dow Chemical, Geon, Imperial Oil, Himont and Shell. Only Novacor and two smaller producers, AT Plastics and Petromont, are Canadian controlled. The compounded resin and plastic products sectors are dominated by small- to medium-sized enterprises (SMEs), most of which are Canadian owned and controlled.

The principal market for synthetic resins is the plastics processing industry, with the secondary market being formulated chemicals. Based on 1993 information, the synthetic resin industry employed 10 500 people. Domestic shipments were $2.6 billion, with imports of $2.2 billion and exports of $1.6 billion. Alberta is the only province that had a trade surplus. The United States was the destination for 80 percent of exports and the origin of 90 percent of imports.

Plastic products are used in a broad range of applications, the most substantial being packaging, construction, automotive and electrical/electronic. (The trade strategy for automotive industries is discussed in a separate chapter.) In 1993, the industry employed 50 000 people, with shipments of $6.1 billion, imports of $2.7 billion and exports of $1.8 billion. Exports have been growing faster than imports, and in real terms, the trade deficit declined slightly in 1993. Approximately 90 percent of export trade and 80 percent of import trade has been with the United States. These figures have been relatively constant over time, reflecting the impact that transportation costs have on product movement.

Within these industries, the products offering the greatest potential for improving Canada's trade balance are synthetic resins, high-performance compounded resins, construction products and packaging.

Plastic products with export potential to distant markets are those that offer a technological advantage. Otherwise, the prospects for direct export are limited, and the main opportunity for Canadian companies lies in the exporting of technology through joint ventures or acquisitions in foreign markets.

Synthetic Resins

Priority Countries
Argentina
China/Hong Kong
Indonesia
Japan
Malaysia
Mexico
United States
Venezuela

All synthetic resins showed strong export growth during 1994. The biggest gains in absolute terms were made by the commodity resins (polyethylene, polypropylene, polystyrene, ABS and PVC). Solid growth also occurred in engineering resins such as acrylic, nylon, polyester and polycarbonate.

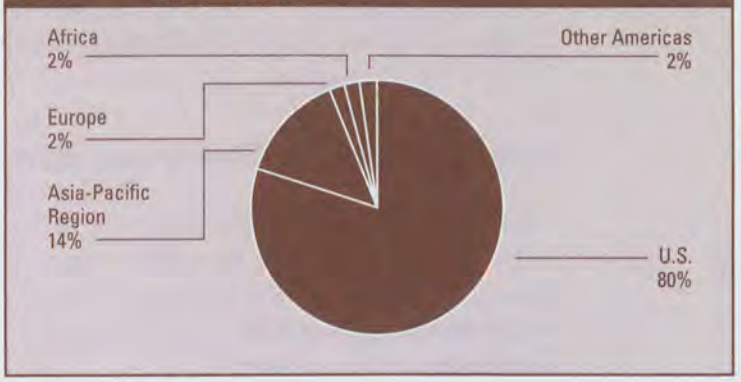
Typically, less that 70 percent of exports have gone to the United States, with more than 30 percent going to the Asia-Pacific region. During 1993-94, U.S. demand for synthetic resins has been very strong, reflecting the overall strength of that economy. Even though Asian demand remained strong, prices in that part of the world decreased as local capacity increased. Since higher margins were achievable by shipping to the United States, the trade flows adjusted accordingly.

China is the largest export market in the Asia-Pacific region, but its annual demand varies considerably. Initiatives leading to increased penetration and predictability in China would be valuable to Canadian exporters. Other markets in Asia-Pacific offer long-term potential. While resin capacity is being strengthened in many of these countries, the region is still expected to be a net importer for some time.

Many Central and South American economies are also experiencing rapid growth and offer good potential for resin exports.

Resin-exporting companies possess extensive international sales networks. The Government can assist these companies primarily in foreign market access.

Figure 1 — Destination of Synthetic Resins Exports, 1993 (% of total)



Source: Industry Canada

Compounded Resins

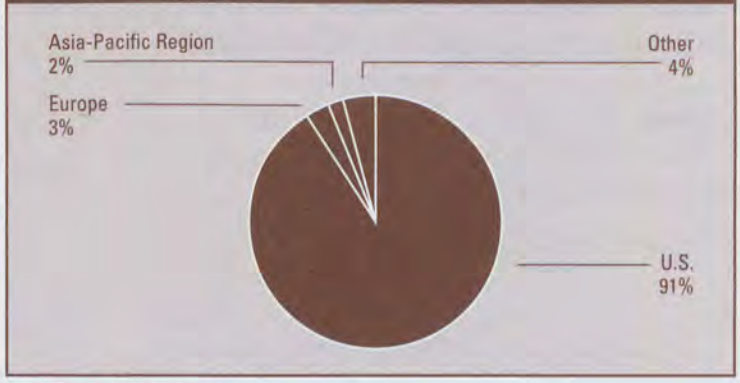
Compounded resins are produced by blending functional additives with synthetic resins, yielding feedstock for plastic processors. Trade information on this group of materials cannot be isolated from data on synthetic resins. However, feedback from previous international activities suggests that China and the Middle East are two areas that hold good export potential for high value-added compounds.

Construction Products

Priority Countries
Argentina
France
Germany
Japan
Mexico
Taiwan
United States

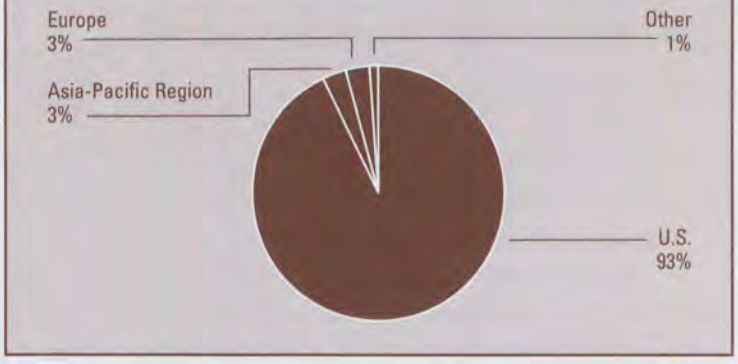
The United States is the main export destination for construction products. Exports to all regions of the U.S. have increased over each of the past three years. There are still situations where non-tariff barriers impede market penetration, including "Buy America" policies, product-marking requirements and standards differences.

Figure 2 — Destination of Construction Products Exports, 1993 (% of total)



Source: Industry Canada

Figure 3 — Destination of Packaging Exports, 1993 (% of total)



Source: Industry Canada

While trade to the rest of the world is comparatively small, exports to certain countries have shown strong growth. These have been highlighted as prospects for trade promotion activities.

Packaging

Priority Countries
Australia
China/Hong Kong
France
Mexico
New Zealand
Taiwan
United Kingdom
United States

Again, exports to the U.S. dominate the packaging sector, while other growth countries that are listed as priorities are scattered throughout the world.

Demand for packaging closely follows growth in the economy. Plastics packaging is still gaining market share at the expense of other materials. Sustaining this trend will depend, however, on the industry fulfilling its obligations in solid waste management.

Strategic Direction

The Ontario government convened a series of discussions with the plastics industry in 1993-94. The most tangible result of this process was a document entitled *A Winning Strategy*. Assuming its implementation, a measure of the success of the strategy would be a 50-percent decrease in Ontario's existing trade deficit in plastic products by 1999. This would come from a combination of import replacement and export development. The strategy recommends that trade promotion and a market development institute be established for the plastics industry, which would offer companies assistance with all aspects of exporting, on a fee-for-service basis.

The future growth potential of the Canadian plastics industry will be largely dependent on its ability to expand export markets. Access to the best available information is important as companies strive to remain internationally competitive. With this objective, and in collaboration with industry, the federal government will:

- prepare and disseminate a Sector Competitiveness Framework on the plastics industry that will be used as a tool to assist both company and government decision makers (Industry Canada [IC]);
- prepare and disseminate an electronic product called INSIGHT that will provide easier access to information on government programs and services, and strategic business information (IC);

- support the infrastructure that provides technology services to the industry as a means of encouraging companies to gain competitive advantage through technology (IC, National Research Council [NRC]);
- organize Canadian stands at selected international trade shows. Although Canadian exhibitors fall mostly within the machinery and mould industry, processors also benefit from peripheral events that are arranged in conjunction with the shows (Department of Foreign Affairs and International Trade [DFAIT]/missions);
- explore the possibility of an interchange agreement that would second government staff to an export council servicing the plastics industry (DFAIT, IC);
- conduct benchmarking studies so companies can better position themselves in relation to Canadian and foreign competitors (IC);
- improve trade commissioners' knowledge of the needs and capabilities of the plastics industry.

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Advanced Materials

Advanced materials (AM) constitute a spectrum of new materials and processes that allow for the design and manufacture of products with novel and improved properties. The materials can be used either in structural applications (e.g in the construction and automotive sectors), or in functional applications (e.g. uses that exploit electronic and superconductive properties). The AM field is not considered a sector like others. There are only a few small- and medium-sized enterprises (SMEs) operating solely in the field. For large firms such as Inco, Noranda, Alcan, and Sherritt Inc., advanced materials comprise a significant portion of research and development (R&D) efforts, but represent only a limited percentage of revenues.

Advanced materials include metals, ceramics, polymers and their composites. They are high value-added materials at the early stage of the product life cycle, with enabling capabilities for many industries.

International Environment

The market for advanced materials is difficult to estimate. The field is highly diversified, with differing definitions and scarce production and consumption data. Harmonized System (HS) or Standard Industrial Code (SIC) statistics are not sufficiently refined to be able to segregate information on advanced materials. Nevertheless, it is estimated that the world market for AM will be $450 billion by the year 2000, with the U.S. market representing 50 percent of the total.

Despite the rapid reduction in defence spending in recent years, combined with an economic slowdown throughout the industrialized world, AM markets continue to show strong growth, particularly in the transport sector in response to environmental pressures to design with lightweight and recyclable materials. In civilian structural applications such as bridges, seaports and buildings, Japan, Europe and more recently, the United States, have deployed initiatives to demonstrate and validate the use of AM (e.g. fibre-reinforced concrete, polymer composite reinforcing bars) in these new markets.

The market for advanced composites shipments in the U.S. was approximately US$2.7 billion in 1993, and is expected to grow to US$2.9 billion in 1994, an increase of 6.2 percent. Overall, composites continue to grow at roughly twice the rate of the gross domestic product (GDP) of industrialized countries. Although metal and ceramic matrices are expected to have average annual growth rates of about 20 percent, their combined value is less than 5 percent of the total forecast for advanced composites in 1993. Japanese and European markets are expected to show similar growth rates.

The world market for advanced ceramics in 1993 was approximately US$18 billion, an increase of 20 percent over the previous year. The world market for all ceramics (glass, refractories, porcelains, etc.) was US$90 billion in 1993. The world's top five advanced ceramics producing companies are:

- Philips Electronics (Netherlands) US$4.1 billion;
- Kyocera (Japan) US$3.1 billion;
- Murata Manufacturing (Japan) US$2.2 billion;
- Saint-Gobain (France) US$1.4 billion;
- Corning Inc. (United States) US$1.2 billion.

(Source: Ceramic Industry 1993 survey)

The advanced ceramics market continues to grow rapidly, with eight new plants constructed in 1993, six in the United States, one in the Czech Republic and one in Japan. The recession in Europe and an economic slowdown in Japan have

reduced market opportunities for advanced ceramics in these markets, although this situation is expected to improve in 1995-96.

Canadian Position

Canada's current AM segment is small in dollar terms, relative to traditional materials, and is a marginal player in this sector compared to Europe, Japan and the United States.

A recent study on the polymer composites market in Canada, sponsored by the Canadian Association for Composite Structures and Materials, established the market at $1.4 billion in 1993. Approximately 20 percent of this market can be classified as advanced polymer composites.

Increasingly, Canada's large metal processing companies are undertaking the development, production and marketing of new value-added materials. Alcan, for example, is the world's largest manufacturer of aluminum matrix composites. Other firms such as Inco, Noranda and Sherritt Inc. are actively pursuing AM development opportunities.

Canada possesses niche strengths in sectors such as metal matrices, metal powders, ceramics and polymers, and there is room for substantial growth in the long term.

Strategic Direction

In 1995-96 attention will be concentrated on providing Canadian SMEs with better access to international AM technology and market information from the United States, Europe and Japan. International networking opportunities will be supported at conferences, through workshops and between firms, to promote technology inflow, joint R&D partnerships and the development of new markets. Emphasis will be placed on firms that produce new materials, and those that have unique applications of new materials. R&D and marketing alliances will be brokered between firms, with special attention to applications in the automotive, construction, aerospace, medical device and other niche market sectors. Consistent with these initiatives, Industry Canada (IC) and the Department of Foreign Affairs and International Trade (DFAIT) will:

- prepare and disseminate INSIGHT, an electronic product providing information on Canadian companies, gateways and stakeholders in advanced materials (IC);
- financially support two Canadian international conferences, Enercomp '95, on composite materials and energy, and ICCM-10, on composite materials (IC, DFAIT);
- seek opportunities under Canada-U.S. defence development and production sharing agreements. The U.S. is the priority export market for Canada's AM manufacturers. The U.S. economic recovery, combined with improving competitive advantages vis-à-vis the major overseas industrial economies, is expected to provide strong growth in investments of new materials production facilities and applications. The U.S. market presents a fertile ground for technology acquisition and the commercialization of AM-based products and processes (DFAIT, IC);
- organize a forum of SMEs, industrial technology agents, government laboratory representatives and technology officers from the U.S., the European Union (EU) and Japan, to exchange information on technology and investment inflow needs and opportunities in AM and export market intelligence (DFAIT, IC, National Research Council);
- in conjunction with industry, government and academia, work on the development of a technology inflow network (including creation of partnerships) and export market opportunities (DFAIT, IC);
- explore linkages with Japan, which has established technological strength in AM and is an important source of technology. The Japan Science and Technology Fund,

administered by DFAIT, will continue to support a variety of co-operative science and technology activities. Specifically, Japan's work in composites technology for bridges and structures may find commercial applications in North America. There is also growing interest on the part of Japanese auto manufacturers to increase their use of light metals such as magnesium and aluminum, including composite forms (DFAIT);

- enhance the collection and dissemination of technology and market intelligence reports from key missions (DFAIT, IC);
- seek strategic opportunities to forge co-operative ventures between Canadian and European partners in advanced materials, such as aerospace, construction products and surface transportation equipment. Some European firms have unique capabilities in polymer composites, and have made impressive progress in developing commercial civilian applications of these materials (DFAIT/missions);
- support participation and networking of Canadian firms at Journée européenne des matériaux composites, Europe's benchmark conference on composite materials (DFAIT, IC).

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Chemicals, Plastics and Advanced Materials

Activity	Date	Location	Dept.	Contact
Canada				
Sector Expert Group on Advanced Materials	TBD	Ottawa	IC	613-954-3114
SME International Markets Technology and Investment Forum	TBD	Ottawa	IC	613-954-3114
Latin America and the Caribbean				
Buyers' Mission from Mexico to Plast-Ex '95	May-95	Toronto	DFAIT	613-995-8742
Mission of Chemical Buyers from Trinidad	May-95	Toronto, Montréal	DFAIT	613-943-8807
Brasilplast '95	18-May-95	Sao Paulo	DFAIT	613-996-5549
Multiple Markets				
Insight - Chemicals & Plastics	Ongoing	Ottawa	IC	613-954-3016
Plastics Sector Competitiveness Framework	Apr-95	Ottawa	IC	613-954-3016
Plast-Ex '95 - International Pavilion	May-95	Toronto	Ontario	416-325-6661
Enercomp '95	08-May-95	Montréal	IC	613-954-3114
Power Metallurgy - TEC '95 World Congress	14-May-95	Seattle	IC	613-954-3118
Tenth International Conference on Composite Materials	14-Aug-95	Whistler	IC	613-954-3140
K '95: Plastics Show	Oct-95	Dusseldorf	DFAIT	613-996-1530
United States				
Seminar on U.S. Market Opportunities for Chemical Products	TBD	Ontario, Montréal, Calgary	DFAIT	613-944-7486
Buyers Mission from U.S. to Plast-Ex '95	May-95	Toronto	DFAIT	613-944-7486
Database of Plastics Processing Equipment Fabricators	Jun-95	TBD	DFAIT	613-944-7486
Market Opportunities Study of Plastics Processing Equipment	Sep-95	TBD	IC	613-944-7486
Outgoing Mission of Mould & Dye Manufacturers to U.S.	Dec-95	Akron, Cleveland	DFAIT	613-944-7486
NEBS Mission to Chem Show	Dec-95	New York	DFAIT	613-944-7486
Western Europe and European Union				
Journées européennes de composites	26-Jul-95	Paris	IC	613-954-3114

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

Government of Canada Gouvernement du Canada

Canada