13

Fish and Seafood Products

Canada's International Business Strategy

1996-1997

Team Canada • Équipe Canada

Canada's International Business Strategy

*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. Aerospace and Defence
3. Agriculture, Food and Beverages
4. Arts and Cultural Industries
5. Automotive
6. Bio-Industries
7. Business, Professional and Educational Services
8. Chemicals, Plastics and Advanced Materials
9. Construction Products and Services
10. Consumer Products
    - *Apparel*
    - *Textiles*
    - *Footwear*
    - *Sporting Goods*
    - *Pleasure Boats and Equipment*
    - *Tools, Hardware and Housewares*
    - *Residential Furniture*
    - *Business and Institutional Furniture*
    - *Giftware and Crafts*
11. Electrical Power Equipment and Services
12. Environmental Industry
13. Fish and Seafood Products
14. Forest Industries
15. Information Technologies and Telecommunications
    - *Overview*
    - *Telecommunications Equipment and Services*
    - *Software Products, Computer Services and New Media*
    - *Geomatics*
    - *Computers, Peripherals and Instrumentation*
    - *Electronic Components*
16. Medical and Health-care Products and Services
    - *Medical Devices*
    - *Pharmaceuticals*
    - *Health-care Services*
17. Metals, Minerals and Related Equipment, Services and Technology
18. Oil and Gas Products and Energy Equipment
19. Resource Equipment and Technology
    - *Agricultural Technology, Machinery and Equipment*
    - *Ocean and Marine Shipboard Technology*
20. Space
21. Tourism
22. Urban Transit and Rail Equipment

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.

Cat. No. C2-226/13-1996E ISBN 0-662-24046-4

Aussi disponible en français sous le titre Poissons et fruits de mer.

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

Canadian Position

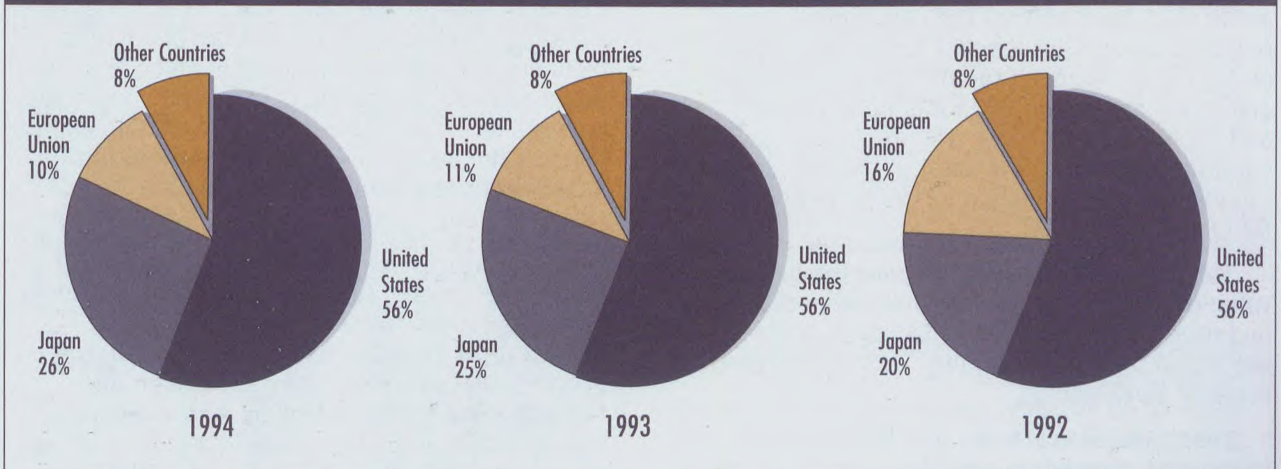
Total fishery landings in Canada decreased to 947 564 tonnes in 1994, down from 1.1 million tonnes in 1993. The value of 1994 landings, at $1.55 billion, was little changed from 1993 levels. On the Atlantic coast, groundfish landings declined by 51 percent to 140 826 tonnes in 1994. Total value of these landings decreased by 36 percent to $119 million. Landings of pelagic species fell nearly 50 000 tonnes to 232 996 tonnes in 1994, resulting in a value of $61.5 million, down from $74 million the previous year. Shellfish landings rose to 277 046 tonnes in 1994, up 6.5 percent from the previous year. Value of shellfish landed amounted to $855 million in 1994, an increase of approximately 35 percent over 1993.

On the Pacific coast, landings stayed close to the 1993 level of 279 984 tonnes at 281 456 tonnes in 1994, yet landed value increased to $448 million from $423 million for 1993. Shellfish landings in 1994 were 26 401 tonnes, down from 26 789 tonnes in 1993. Value of these landings increased by 27 percent to $94 million in 1994.

Landings from inland fisheries decreased by 691 tonnes to 36 000 tonnes in 1994. Value of these landings totalled $75 million, down $1 million from the previous year.

Canadian fisheries production was valued at $3.2 billion in 1994, up from $2.9 billion in 1993. In terms of value, Canada exports 88 percent of its fishery production to some 100 countries globally. In 1994, Canada exported 441 606 tonnes of fish products valued at $2.83 billion, compared with 1993 exports valued at $2.57 billion. The growth in exports can be attributed to high-valued shellfish and aquacultured products shipped mainly to the United States and Japan. Canada currently ranks fifth in the world in terms of the value of seafood exports. The domestic market has declined in importance, going from 24 percent of product value sold in 1992, to 13 percent in 1994.

Figure 1
Canadian Fish and Seafood Exports by Destination, 1994 versus 1992 and 1993



Source: Statistics Canada, International Trade Division

Atlantic Canada has the largest commercial fishery, with total production of $2.1 billion in 1994. The largest processing operations in Atlantic Canada have restructured due to severe groundfish declines and, as a result, have become more diverse in both their source of raw material and their finished products. The processing sector on the Atlantic coast consists of approximately 900 establishments that employ more than 60 000 individuals.

The Pacific fishery includes about 200 processing facilities. Average monthly employment is estimated at 5700, but it is highly seasonal. The value of fisheries production was $0.9 billion in 1994, the same as in 1993. Salmon accounted for over 45 percent of total production (46 percent in 1993) and herring remained at 20 percent. Canned, fresh and frozen salmon accounted for 95 percent of the salmon output value (80 percent in 1993). The number of commercial fish species from B.C. waters has increased from 20 in 1971 to over 80 in 1994.

The limited-entry Pacific halibut, sablefish and geoduck fisheries continued to be managed through individual transferable quotas (ITQs) in 1994. The ITQ program benefits include increased landed value, reduced fishing costs, and improved enforcement of assigned quotas. Halibut and geoduck have been managed under an ITQ regime since 1989, and sablefish since 1990. Red and green sea urchins and sea cucumbers adopted an ITQ system in 1995.

Canada's aquaculture industry ranges from small family operations to large integrated multinational enterprises (MNEs). Currently, salmon, oysters, trout and mussels are the principal species produced. Scallops, manila clams and arctic char have entered the commercial stage, but total production remains small. The supply and services sector of the fish-farming industry generated more than $275 million in domestic and export sales in 1994. The total value of aquaculture production (farm gate) in Canada increased to more than $300 million in 1994, compared with $259 million in 1992.

This value continues to surpass the landed value of wild production for trout, salmon, mussels and oysters. In 1994, farmed salmon production amounted to 259 000 tonnes, with a farm-gate value of $245 million.

There are several ways that the Canadian industry is increasing innovation and demonstrating the competitiveness necessary to survive in global markets. The west and east coast fisheries, in particular, have recorded some successes in adjusting to the emerging realities of the 1990s and beyond. For instance:

- joint ventures, technology exchanges and marketing arrangements with foreign firms in Japan, the United States and European countries are increasing;
- in an effort to maintain resource sustainability and increase competitiveness, considerable pre-competitive co-operative initiatives now exist in the field of product processing and post-processing technology (e.g. research into ozonation and wastewater treatment);
- Newfoundland and Nova Scotia have replaced an estimated 100 000 tonnes of raw material needs through global sourcing, as well as effectively bringing these products to market;
- the west coast industry has been successful in increasing its penetration of the U.S. market and is actively looking to growth areas such as New Zealand and Latin America, especially Mexico. Established markets in Japan and Western Europe will be maintained.

Major Bilateral Initiatives

The Canada-U.S. Free Trade Agreement (FTA) provides preferred access to the United States under a 10-year schedule for elimination of all bilateral tariffs by 1998.

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

The U.S. is now in the process of finalizing a seafood Hazard Analysis Critical Control Point (HACCP) Program. In Canada, all federally registered plants have implemented the Quality Management Program (QMP), a HACCP-based program that provides added assurance that Canadian fish products comply with regulatory requirements. It is expected that a mutual recognition agreement will be concluded, facilitating market access.

Work is proceeding on improving harmonization of sensory standards used by both countries. A declaration of equivalency is expected regarding molluscan shellfish inspection programs.

Under the border inspection regime with the U.S., Canada instituted a revised listeria policy in November 1994.

Consultations with New Zealand lifted the import ban on headed and gutted wild-caught Pacific salmon.

Multilateral Initiatives

The North American Free Trade Agreement (NAFTA) builds on the FTA by including Mexico, where tariffs will be eliminated eventually on imports of fishery products from Canada and the United States. Tariffs have already been eliminated for a number of species of interest to Canada, including Atlantic and Pacific salmon, crab, hake, herring, mackerel, haddock and dried smoked fish. In addition, tariffs will be phased out over five years for lobster, scallops, mussels, oysters, halibut and prepared and processed fish and over 10 years for frozen fish fillets. Mexican import licenses for lobster are no longer required.

In December 1994, the NAFTA partners initiated negotiations on Chilean accession to the NAFTA.

The 1994 Uruguay Round agreement transformed the General Agreement on Tariffs and Trade (GATT) into the World Trade Organization (WTO), and from January 1995 has improved Canadian market access in many countries, particularly in Japan where tariffs will be reduced by 30 percent. Korean tariffs declined by 45 percent and are now in the range of 10-20 percent. European Union (EU) groundfish tariffs on many items of interest to Canada will fall to the range of 7.5 percent-12.0 percent. Opportunities will also arise where developing countries reduce tariffs by about 30 percent and bind them.

Market access to the EU has also improved as a result of the 1993 recognition of equivalency of Canada's fish inspection system with its reliance on the QMP. This success has led to greatly reduced inspections by EU member states as of January 1993. Fishery products not currently covered by the derogation include live molluscan shellfish products and live aquacultured products because of fish health and disease concerns. Agreements will be pursued in 1996 to permit similar ease of access for these products into the European Union.

Concerns have been raised that a global veterinary mutual recognition agreement (MRA) on meat and fishery products, proposed by the EU, might have an impact on the benefits Canada now receives under Commission decision 93/495/EEC, an equivalency agreement laying down conditions for importing fishery products from Canada to the EU. The EU has also proposed minimal sampling frequencies on imports, which might impose additional costs and delays for Canadian imports into the EU. Canada has sought assurances that the mutual recognition directive for fish and fish products will continue to apply while a global veterinary agreement is being negotiated.

Discussions with the EU lifted access restrictions from arbitrary inspection procedures, particularly by France, under the MRA, and WTO Article 22 consultations were held on scallop nomenclature in June 1995.

A number of memorandums of understanding (MOUs) have been concluded in the areas of inspection, certification, technical co-operation, trade and information exchanges with Australia, Japan, Thailand, the Philippines and Iceland.

International Environment

The annual world harvest of fish and shellfish (including aquaculture) reached a record level of 101.4 million tonnes in 1993, an increase of 3.4 percent from the 1992 level of 98.8 million tonnes. The increase in total landings came almost entirely from aquaculture, which accounted for 16 million tonnes in 1993 or 16 percent of world production.

Up to a third of the total world fish and shellfish catch was reduced into fish meals, oils and other industrial products. Some 23 percent of fish production for human consumption was from aquaculture. Global wild capture fish levels are flat or even decreasing, and catch patterns have changed. The earth's population is expected to increase to 7 billion by 2010, with 92 percent of that growth to occur in developing countries. This implies an increase in demand of 19 million tonnes of food fish over the 1993 level of 72.3 million tonnes.

Aquacultured products will play an increasing role in meeting the demand. Global aquaculture farming grew 13.6 percent annually up to 1984 and then 9 percent annually from 1984 to 1992. In 1993, 65 percent of the total aquaculture production came from fresh water, and 35 percent was cultured in marine waters. A surprisingly low share of total aquaculture production is marine fish. For example, salmon represents a mere 7 percent of total production. Asia accounts for 84 percent of all aquaculture production, with China representing 60 percent of that. Total aquaculture production is expected to reach 19.6 million tonnes by the year 2000.

Whereas 20 years ago, developed countries accounted for more than 60 percent of the catch, it is developing countries that now harvest this share. A striking illustration of the major change in wild fisheries catches is the increased role of China, which has overtaken both Japan and the former Soviet Union. China was first for the fourth year in a row in 1993, with landings of 17.5 million tonnes. Peru was second, Japan was third and Chile was in fourth place. Canada dropped to 18th place at 1.25 million tonnes.

Although there are over 143 countries reporting to the Food & Agriculture Organization of the United Nations (FAO), 35 countries produce 98 percent of the value of fish and seafood products and 96 percent of the gross dollar volume. Twenty countries take 80 percent of the marine catch; 11 countries account for 85 percent of global aquaculture production.

The volume of international fish trade has grown substantially over the past few decades. The quantity of fish and fishery products entering international trade continued to grow in 1993, but the overall value of fish exports declined to US$40 billion.

Access Issues

Although Canada has been a beneficiary of reduced tariffs through the seven rounds of multilateral tariff cutting under the GATT, some tariffs and non-tariff barriers (import licensing, quotas, technical standards, health regulations, etc.) continue to inhibit Canadian access to foreign markets. In addition, tariffs are significantly higher on further-processed products. In the EU, for instance, tariffs remain higher than in many developing countries. Canada continues to seek lower tariffs and the elimination of non-tariff barriers through ongoing bilateral and multilateral negotiations.

Environmental Considerations

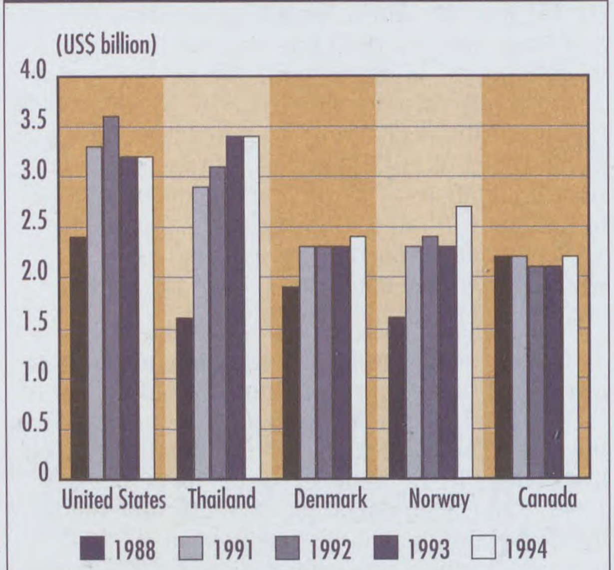
Fisheries management authorities are moving gradually away from a single-species approach to a larger ecosystem approach.

The by-catch of marine species not wanted by a particular fishery because of undersize, or for economic, regulatory, and cultural reasons, totals 27 million tonnes annually. This equals a third of the total tonnage kept for consumption. The FAO recently concluded that 60 percent of the by-catch could be eliminated within five years by using selective gear technology that exists today.

In the spring of 1994, the Government of Canada approved the second phase of the Great Lakes Action Plan (GLAP 2000), which involves rehabilitation of degraded areas, pollution prevention and control, ecosystem and human health conservation and integrated ecosystems management. GLAP 2000 supports Canadian commitments under the Canada-U.S. Great Lakes Water Quality Agreement.

On the Pacific coast, Canada continues to press for conservation and equity as outlined in the Pacific Salmon Treaty signed by Canada and the United States in 1985. The Treaty expired in 1992, and a one-year arrangement was negotiated

Figure 2
World's Top Five Fish Exporters



Source: Food and Agriculture Organization, Department of Fisheries and Oceans Canada in 1993. No agreement was reached in 1994. In 1995, discussions toward joint management regimes for the salmon fishery were not agreed upon.

The Fraser River Estuary Management Program (FREMP) was extended in October 1994. FREMP was initiated to facilitate the implementation of sustainable development concepts in the Fraser River estuary through the adoption of common objectives, the co-ordination of activities and development of management plans. The Fraser River is the single largest salmon-producing river in Canada and it is subject to some of the most intense development pressures in the country.

Canada and U.S. delegations concluded negotiations on an interim agreement for the conservation of Yukon salmon in December 1994. The interim agreement will establish a panel that will initiate restoration and enhancement projects for Canadian-origin Yukon River salmon. Negotiations continue in order to establish a long-term agreement that will set in place a permanent framework for conservation and catch sharing between Canada and the United States.

The North Pacific Marine Science Organization (PICES) was established by a convention in March 1992. Its members are Canada, China, Japan, Russia and the United States. PICES provides a scientific forum in which to address issues such as global climate change and its impact on marine resources in the North Pacific; the prediction of the effects of oil spills, marine debris and other pollution; and the survivability of salmon and steelhead trout at sea. The third meeting of the Organization was held in Nemuro, Japan in October 1994.

The North Pacific Anadromous Fish Commission (NPAFC) was established by a convention in February 1993, replacing the International North Pacific Fisheries Commission. Its members are Canada, Japan, Russia and the United States. Under the convention, these countries agreed to prohibit directed fishing for salmon on the high seas of the North Pacific Ocean. They also agreed to co-operate to stop other countries from salmon fishing on the high seas and to prevent trafficking in illegally caught salmon. At the second meeting in Vladivostok, Russia, in October 1994, enforcement officials reviewed surveillance and patrol efforts and pledged to continue air and sea patrols during 1995.

Main Challenges

Foreign overfishing has continued to be a problem in areas of Canada's Atlantic continental shelf outside 200 miles — the Nose and Tail of the Grand Banks and the Flemish Cap. This fishing was done primarily by non-contracting parties to the Northwest Atlantic Fisheries Organization (NAFO), including flag of convenience and stateless vessels. Bill C-29 implemented regulations from May 25, 1994, which enable Canada to take appropriate enforcement action, including arrest, of flag of convenience and stateless vessels fishing for specified straddling stocks on the Nose and Tail of the Grand Banks and for Greenland halibut on the Flemish Cap.

Traditional Canadian groundfish supplies are virtually non-existent, and recent scientific surveys have been discouraging. It now appears likely that recovery of stocks, especially cod off the northeast coast of Newfoundland and on the Grand Banks, may take longer than 10 years. The recovery of cod and flatfish stocks on the Grand Banks will depend on Canada's ability to halt the continued fishing practices of foreign fleets.

The overall objective of structural adjustment measures is to harmonize fleet capacity to the available fish resources. One approach, the licensing system, has meant a lack of flexibility to allow for a continuous adaptation to changes in resources; it has also prevented necessary adaptation to technical inventions due to the fact that licences were linked to vessel size and equipment. Structural adjustment in a fishery is a slow process. Vessels withdrawn from a fleet often are replaced with vessels that have a greater catching capacity. The replacement value of all commercial fishing vessels is almost equal to the value of all other ships ($173.2 billion for fisheries vessels, compared with $220.2 billion for all merchant ships).

Fisheries conservation and management are high-cost activities. With the movement toward greater privatization, industry will assume greater financial responsibility for, and increased participation in, conservation and management decisions. As a result of declining government spending, for example, Australian and Japanese industry, through cost-sharing initiatives, are closely involved in setting research priorities in support of conservation and management.

Additional challenges include the impact of globalization, such as the increased competition from China and the Russian Federation with their low wage structures. Increasingly, this sector will pursue strategic partnerships (e.g. with Namibia and South Africa) to secure raw material for processing. As well, to fulfil investment opportunities, to increase processing automation and to adapt biotechnology processes, all stakeholders will be required to enhance Canada's trade performance.

Strategic Direction

Market Access Strategy

With the conclusion of the Uruguay Round, the focus will be on addressing and removing non-tariff barriers, with the exception of some opportunities to seek lower tariffs through NAFTA mechanisms, and through negotiating lower unbound rates.

As foreign non-tariff barriers are constantly being established, government will work with industry to maintain and update the fish tariff and non-tariff barrier inventory, while providing industry and sector advisory groups with regular status reports on efforts to resolve issues.

The Department of Fisheries and Oceans (DFO) will collaborate with the Department of Foreign Affairs and International Trade (DFAIT) on major policy initiatives with:

Australia

- determine whether Canada should proceed with WTO consultations based on the import risk assessment draft paper circulated in May 1995;

Japan

- build on the recent reduction of administrative guidelines and tariffs to pursue broader liberalization of tariffs, import quotas and autonomous suspensions of other guidelines;

South Korea and Taiwan

- monitor the South Korean commitment to eliminate import quotas by 1997 as part of its GATT/WTO obligations, while Taiwan's non-tariff barriers are being addressed in bilateral discussions as part of Taiwan's anticipated accession to the WTO;

Mexico

- discuss accelerated tariff cuts on canned sardines in late 1995;

NAFTA

- monitor discussions with Mexico on new rules on subsidies, countervailing duties and anti-dumping actions to protect fisheries interests;

EU

- pursue increased access for larger import quotas and unilateral tariff reductions for herring, smoked salmon, processed lobster and fresh oysters, which are in short supply or not produced in Europe;

WTO

- continue discussions to obtain maximum possible tariff reductions as countries accede to WTO terms (i.e. China, Taiwan, Russia, Ukraine, the Baltic states and now Saudia Arabia);

U.S.

- pursue harmonization of inspection systems and use of marks in the Technical Working Group on Fish and Fishery Products, and update the 1948 Molluscan Shellfish Agreement;
- establish an MOU relative to recognizing equivalency of inspection systems and marks; and
- adopt joint training programs.

Canadian initiatives on inspection systems are expected to:

- complete an agreement with South Africa in 1996;
- finalize an MRA with New Zealand in 1996;
- initiate negotiations for MOUs with Indonesia and Cuba, and consider Argentina, Chile and possibly other Latin American countries for future agreements to improve trade linkages; and
- possibly broaden the inspection agreement with Iceland into an MRA.

The Codex (Alimentarius) Committee on Fish and Fishery Products will maintain efforts to harmonize international standards, expected to be approved by a United Nations Commission in 1996.

The industry is expected to approach DFO or the Department of Finance to review financial and taxation tools that could help companies diversify their exports and increase the per-unit value of exported goods and services.

Market Development Strategy

DFAIT will work closely with DFO, Agriculture and Agri-food Canada (AAFC), the Canadian International Development Agency (CIDA), provincial departments and the Sectoral Advisory Group on International Trade (SAGIT) on the following major export development initiatives. Foremost is implementation of the Team Canada[1] approach of the newly established National Sector Team (NST) for fish and seafood, which is tasked to co-ordinate export activities of federal and provincial departments and industry associations and to monitor progress in achieving targeted results, specifically:

- ensure that sector firms register their capabilities and foreign market interests in the WIN Exports database — the primary tool used by missions abroad and the International Business Opportunities Centre in DFAIT to match export leads with Canadian suppliers;
- work with industry to focus trade development activities on markets of high priority to industry;
- work with industry to develop special export activities (including new approaches not supported through existing programs) in market niches as identified by industry;
- collaborate with industry in selecting the most appropriate fairs and missions for participation by Canadian firms;
- continue to send Canadian experts to international organizations to provide training that serves to develop trade links (e.g. DFO officials are active in the Asia-Pacific Economic Co-operation forum [APEC] and FAO training programs and work related to furthering MRAs between APEC economies);
- undertake an annual review of the previous year's export programs and develop an assessment of their contribution to exports, as part of the DFAIT review of geographic funding mechanisms;
- explore the possibility of industry or federal or provincial government secondments to key posts as proposed in the Canada-Newfoundland economic diversification initiative announced by Fisheries Minister Brian Tobin and Premier Clyde Wells in June 1995.

Market Intelligence

- improve the quality of responses to client inquiries, trade leads and market reviews and intelligence about the seafood industry outside Canada; for key missions, improve the timeliness of the information collected;
- broaden dissemination of timely fisheries market information through DFAIT'S FaxLink, a fax-on-demand system and electronic bulletin board;
- enhance identification and dissemination via FaxLink to Canadian firms of foreign harvesting, processing, post-processing and aquaculture technologies by greater use of the network of technology officers in missions abroad; and
- encourage industry to assume greater responsibility for providing feedback and guidance to missions on gathering intelligence.

Contacts

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

Agriculture and Resource Trade Policy Division
Tel: (613) 992-8172
Fax: (613) 944-0756

[1] To serve business more effectively, the Government is pursuing new approaches, based on a Team Canada partnership with the provinces and the private sector, to help Canadian enterprises compete internationally.

Department of Fisheries and Oceans
Fishing Industry Services
200 Kent Street
Ottawa K1A 0E6
Tel: (613) 993-2540
Fax: (613) 941-2717 or 990-9691

Aquaculture
Tel: (613) 993-2091
Fax: (613) 990-9574

Inspection and Enforcement
Tel: (613) 990-5810
Fax: (613) 993-4220

Agriculture and Agri-food Canada
Food Marketing Industries and Seafood
Market Industry Services Branch
930 Carling Avenue
Ottawa K1A 0C5
Tel: (613) 759-7545
Fax: (613) 759-7480

Canadian International Development Agency
Policy Branch
Sectoral Specialists Directorate
200 Promenade du Portage
Hull K1A 0G4
Tel: (819) 997-0483
Fax: (819) 953-3348

Recent Background Documentation

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

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

Fisheries Atlas of Canada
Canadian Fish and Seafood Exporters Sourcing Guide 1995-96
Available through DFAIT's InfoCentre:
Tel: 1-800-267-8376 or Fax: (613) 996-9709.
Copies may also be obtained through InfoCentre's FaxLink service: Fax: (613) 944-4500.

FISH AND SEAFOOD PRODUCTS

Activity	Date	Location	Dept.	Contact
Asia-Pacific South				
World Fisheries Congress: Conference	28-Jul-96	Brisbane	DFAIT	613-995-7652
East Asia				
Seafood Mission	01-Jan-97	Taipei	DFAIT	613-996-7582
Seafood Promotion Mission	01-May-97	Taipei	DFAIT	613-996-7582
Japan				
Generic Marketing: Advertising/Promotion	01-Apr-96	Tokyo	DFAIT	613-995-1677
Salmon Promotion: Solo Show	01-Jun-96	Kansai	DFAIT	613-995-1677
Salmon Promotion Mission	10-Jun-96	Tokyo/Nagoya/ Fukuoka	DFAIT	613-995-1677
Smoked Fish Products Mini-Study	01-Sep-96	Tokyo	DFAIT	613-995-1677
Canadian Spot Prawn and Northern Shrimp Mission	10-Sep-96	Tokyo/Fukuoka/ Nagoya	DFAIT	613-995-1677
Canadian Seafood Solo Show & Seminar	01-Oct-96	Kansai	DFAIT	613-995-1677
Fukuoka Seafood Solo Show	01-Oct-96	Fukuoka	DFAIT	613-995-1677
Spot Prawn and Shrimp Promotion Mission	01-Oct-96	Nagoya	DFAIT	613-995-1677
Seafood Solo Show	15-Oct-96	Tokyo	DFAIT	613-995-1677
Seaweed Promotion Mission	05-Feb-97	Tokyo	DFAIT	613-995-1677
United States				
Brokers' and Retailers' Mission from the U.S. West Coast	02-May-96	British Columbia	DFAIT	613-944-9474
Fish Buyers' Mission from the U.S.	01-Jun-96	Atlantic Canada	DFAIT	613-944-9474
Aquaculture and Non-Traditional Species: Retail Promotion	01-Aug-96	Minneapolis	DFAIT	613-944-9474
Seafood Buyers' Mission from the U.S. Midwest	01-Aug-96	Quebec/ Atlantic Canada	DFAIT	613-944-9474
Seafood Buyers' Mission from the U.S. West Coast	15-Sep-96	Vancouver	DFAIT	613-944-9474
Seafare '96: Info Booth	21-Sep-96	Las Vegas	DFAIT	613-944-9474
Profile of Seafood Products Sold in Michigan: Study	01-Nov-96	Detroit	DFAIT	613-944-9474
Canadian Seafood, Food & Beverage Show: National Stand	15-Feb-97	Fort Lauderdale	DFAIT	613-944-9474
Boston Seafood Show: N.B. Stand	01-Mar-97	Boston	N.B.	506-444-5898
Boston Seafood Show: Info Booth	01-Mar-97	Boston	DFAIT	613-944-9474

Note: Dates and locations are subject to change.

Activity	Date	Location	Dept.	Contact
Western Europe and the European Union				
European Seafood Exhibition (ESE): National Stand	23-Apr-96	Brussels	DFAIT	613-996-2147

For up-to-date and detailed information on the activities in this document and those contained in other sectors, you may consult the CIBS Compendium. This on-line compilation of activities planned by the federal and provincial governments is continuously revised and is accessible via the Department of Foreign Affairs and International Trade World Wide Web site, at the following address: http://www.dfait-maeci.gc.ca

Acronyms and initialisms used in Canada's International Business Strategy

(This list does not include sector-specific references.)

AAFC	Agricultu
ACOA	Atlantic C
APEC	Asia-Paci forum
ASEAN	Associatic
BBS	electronic
BOOT	build, owr
BOSS	Business System
CCC	Canadian
CIBS	Canada's I Strategy
CIDA	Canadian Agency
CIS	Commonw
CSA	Canadian
DFAIT	Departme Internatio
DFO	Departme
DND	Departme
EC	Environme
EDC	Export De
EU	European
FITT	Forum for
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

	nternational Business Opportunities Centre
	ndustry Canada
	nternational Development Research Centre
	nternational financial institution
	nternational Standards Organization
	nternational Trade Advisory Committee
	nternational Trade Centre
	inistry of Agriculture, Fisheries and Food of Quebec
	multilateral development bank
	multinational enterprise
	orth American Free Trade Agreement
	orth Atlantic Treaty Organization
	ational Research Council
	atural Resources Canada
	atural Resources Canada — Canadian Forest Service
	ational Sector Team
	rganization for Economic Co-operation and Development
	rogram for Export Marketing Development
R&D	research and development
S&T	science and technology
SAGIT	Sectoral Advisory Group on International Trade
SME	small and medium-sized enterprise
UNEP	United Nations Environmental Program
WED	Western Economic Diversification
WTO	World Trade Organization

-13

Acronyms and rnational Business Strat

(This list does not inclu

AAFC	Agriculture and Agri-Food Canada
ACOA	Atlantic Canada Opportunities Agency
APEC	Asia-Pacific Economic Co-operation forum
ASEAN	Association of Southeast Asian Nations
BBS	electronic bulletin board system
BOOT	build, own/operate, transfer
BOSS	Business Opportunities Sourcing System
CCC	Canadian Commercial Corporation
CIBS	Canada's International Business Strategy
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
IBOC	International Business Opportunities Centre
IC	Industry Canada
IDRC	International Development Research Centre
IFI	international financial institution
ISO	International Standards Organization
ITAC	International Trade Advisory Committee
ITC	International Trade Centre
MAPAQ	Ministry of Agriculture, Fisheries and Food of Quebec
MDB	multilateral development bank
MNE	multinational enterprise
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
NST	National Sector Team
OECD	Organization for Economic Co-operation and Development
PEMD	Program for Export Marketing Development
R&D	research and development
S&T	science and technology
SAGIT	Sectoral Advisory Group on International Trade
SME	small and medium-sized enterprise
UNEP	United Nations Environmental Program
WED	Western Economic Diversification
WTO	World Trade Organization