

QUEEN
HF
1479
.I57
1996/97
v.17

17

**Metals, Minerals and
Related Equipment, Services
and Technology**

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 | 14. Forest Industries |
| 1. Advanced Manufacturing Technologies | 15. Information Technologies and Telecommunications <i>Overview</i> <i>Telecommunications Equipment and Services</i> <i>Software Products, Computer Services and New Media</i> <i>Geomatics</i> <i>Computers, Peripherals and Instrumentation</i> <i>Electronic Components</i> |
| 2. Aerospace and Defence | 16. Medical and Health-care Products and Services <i>Medical Devices</i> <i>Pharmaceuticals</i> <i>Health-care Services</i> |
| 3. Agriculture, Food and Beverages | 17. Metals, Minerals and Related Equipment, Services and Technology |
| 4. Arts and Cultural Industries | 18. Oil and Gas Products and Energy Equipment |
| 5. Automotive | 19. Resource Equipment and Technology <i>Agricultural Technology, Machinery and Equipment</i> <i>Ocean and Marine Shipboard Technology</i> |
| 6. Bio-Industries | 20. Space |
| 7. Business, Professional and Educational Services | 21. Tourism |
| 8. Chemicals, Plastics and Advanced Materials | 22. Urban Transit and Rail Equipment |
| 9. Construction Products and Services | |
| 10. Consumer Products <i>Apparel</i> <i>Textiles</i> <i>Footwear</i> <i>Sporting Goods</i> <i>Pleasure Boats and Equipment</i> <i>Tools, Hardware and Housewares</i> <i>Residential Furniture</i> <i>Business and Institutional Furniture</i> <i>Giftware and Crafts</i> | |
| 11. Electrical Power Equipment and Services | |
| 12. Environmental Industry | |
| 13. Fish and Seafood Products | |

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.

©Minister of Supply and Services Canada 1996
Cat. No. C2-226/18-1996E ISBN 0-662-24053-7

Aussi disponible en français sous le titre Métaux, minéraux et équipement, services et technologies connexes.

Queen
HF
1479
.I57
1996/97
v. 17

This strategy covers ferrous and non-ferrous industries, including coal and industrial minerals. Part 1 deals with exploration, mining and production of base metals and minerals. Part 2 covers the steel industry, while Part 3 deals with production of aluminium and aluminium goods. Related services, equipment and technology are covered in Part 4.

Table 1
The Minerals and Metals Industry and the Canadian Economy in 1994

| | |
|-------------------------------|-------|
| • Gross Domestic Product | 4.2% |
| • Employment | 2.5% |
| • Exports | 14.6% |
| • Rail and Sea Traffic | 58.0% |
| • Single Industry Communities | 115 |
| • Mines | 485+ |
| • Downstream Establishments | 7300+ |

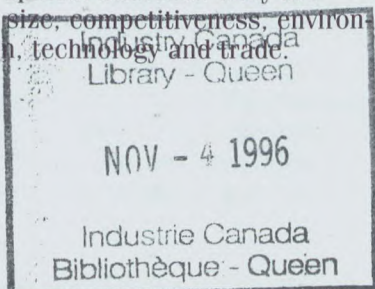
Source: Statistics Canada

Part 1: Minerals and Base Metals

Canadian Position

A major contributor to the economy, Canada's metals and minerals industry is dominated by some of the world's most sophisticated and competitive firms that typically have the resources required to support their international business activities.

- Canada is one of the world's leading producers of copper, nickel and zinc, exporting most of its refined non-ferrous metal production.
- Canada is also a leading world exporter of coal, asbestos, elemental sulphur and potash.
- Leading Canadian base metal producers are large integrated international companies with diversified geographical interests. They are world leaders in size, competitiveness, environmental protection, technology and trade.



- Canadian ferrous producers are strongly export oriented. Major export markets for the most important mineral — iron ore — are Europe and the United States. Cobalt and molybdenum have their major markets abroad.
- Sound management, development and absorption of leading-edge technology and the quality of the labour force keep Canadian companies among the most cost-competitive producers. Over the last five years, the metals industry has invested well over a billion dollars in new plants and technology to meet today's environmental and productivity challenges.
- Proven reserves of the major non-ferrous minerals have decreased in recent years. The industry contends that environmental regulations and growing land access constraints create a less friendly business environment and perceptions that Canada is less internationally competitive in mining investment. Those perceptions are changing, however, helped by the recent Lac de Gras and Voisey Bay discoveries.
- Long distances to Canadian ports present a major cost challenge for coal producers, especially for those in Western Canada. The past two years have seen significant restructuring in Western Canadian operations, resulting in fewer operators. Those firms have, nevertheless, demonstrated an ability to operate profitably.
- Canada will remain the market leader in potash and sulphur with low-cost and abundant high-quality reserves. The cement industry will seek to expand its presence in the U.S. market. The asbestos industry has stabilized and, while regulatory threats remain, expects to maintain its export levels. Smaller segments of the industrial minerals industry, such as dimension stone and peat moss, have made remarkable gains over the last few years and trade missions to Asia have succeeded in developing new markets.
- The thrust for sustainable development and increased cost competitiveness has pushed innovative Canadian companies to the forefront

of the industry. Over the last five years, the industry has invested over \$1 billion in new plants and technology.

- Canadian companies must also meet competition from substitutes and new materials, and must actively promote the unique benefits of their products to adapt to changing markets as well as to defend existing markets.
- Canadian companies and governments are collaborating in research and development (R&D) of processes and technologies to minimize the industry's environmental impacts and ensure that Canada remains a cost-competitive producer.

International Environment

Canada is the world's leading exporter of minerals and metals, followed by Australia. Recently, Russia has become a significant exporter of non-ferrous metals. The largest importers and consumers of minerals and metals are Japan, the European Union (EU) and the U.S., which is also a major producer. China attracts growing interest as a major producer and consumer.

- Growth in production is expected to continue, especially in Chile, Australia, Mexico, Brazil, China and Peru.
- Fastest-growing consumption will occur in Asia: China, South Korea, Taiwan and Southeast Asia.
- Canadian export markets are highly diversified, although the U.S. remains the largest single market for most producers.
- Demand outlook for 1996-97 is for relative stability; most consuming Organization for Economic Co-operation and Development (OECD) countries expect stable or slightly lower industrial growth, while Asia's faster growth continues. High Russian exports of nickel and other minerals will continue, but levels have stabilized and are not expected to depress prices.
- Despite implementation of the North American Free Trade Agreement (NAFTA), trade actions in the U.S. remain a serious threat. Passage of the Helms Bill on dealing with Cuba could also hurt some Canadian companies.
- While the implementation of the Uruguay Round of Multilateral Trade Negotiations will improve market access for non-ferrous minerals

and metals, original expectations have not been met and may not lead to increased exports. Increased sales will likely come from Canadian-owned mines outside Canada.

- After a marked increase in 1994, the prices for some non-ferrous commodities dropped, then stabilized in 1995. Assuming no major supply disruptions, prospects are for price stability over the next year or so.
- Worldwide trade in metallurgical coal is not expected to grow in the near future, due to the increase in electric arc steel making and blast furnaces that use less coal. However, prices are expected to remain stable in the foreseeable future, as metallurgical coal mines are producing at near capacity.
- Projected increases in thermal power generation in Asian countries have improved prospects for Canadian thermal coal, although stiff competition from Australia and Indonesia will mean that prices should increase, albeit slowly.
- Europe could also present new export opportunities, as Germany continues to reduce subsidies to its coal industry, likely leading to mine closures.
- Canada's abundant high-quality industrial minerals — potash, sulphur, asbestos, limestone, granite and peat moss — offer good prospects for increased production and exports. International supply competition is expected to prevent significant long-term price increases.
- The effect of environmental and health regulations on trade and investment patterns presents a growing long-term challenge to the minerals and base metals industry, along with more traditional issues of supply and demand, labour, tariffs production costs and technology. Multilateral organizations such as the United Nations (UN) agencies, the OECD, and the WTO are creating sustainable development policies, like the Basel Convention and the OECD risk-reduction exercise, which have an impact on production, transportation, use and disposal of chemicals, including all minerals and metals. A strategy to respond to these new challenges will require government-industry co-operation.
- While Canada, the U.S. and Australia have traditionally received the most global exploration investment, other countries, particularly in Latin America, have recently emerged as competitors for investment. Increasing production from

Australia and from Asian and South American countries that have recently liberalized their investment climates will also affect Canada's long-term relative share of the world market.

- The precious and base metals industries are particularly subject to extreme cycles, and there is some question whether recent capacity increases spurred by higher prices will affect changes in demand. Another uncertainty is the stability of producing nations. Severe political or economic disruptions in producing countries can have a significant short-term impact on prices.
- Finally, a large share of mineral production comes from developing countries, where facilities may be owned by governments whose objectives do not give priority to market stability. In response, Canada has for decades pursued a strategy of market transparency through international commodity study groups with members from major producing and consuming countries.

Main Challenges

In summary, leading international issues for the Canadian industry include:

- market access, including trade actions and multilateral regulatory activities, particularly regarding the environment and health;
- market transparency and intelligence;
- cost competition from and investment opportunities in emerging and rapidly developing economies;
- possible market disruptions due to uncertainty of supply from the former Soviet Union (FSU) and its lack of transparency;
- encouraging foreign and domestic sources of capital to invest in exploration and mine development in Canada;
- trade promotion for specialty minerals; and
- development and marketing of new and existing uses.

Strategic Direction

Market Access

The Canadian industry requires government support in international trade agreements, trade actions and regulatory exercises. The Government, in co-operation with industry, will:

- monitor trade developments and promote Canadian interests in trade actions (Natural Resources Canada [NRCan], Department of Foreign Affairs and International Trade [DFAIT], Industry Canada [IC]);
- ensure that trade/environment/health regulatory initiatives by international institutions and other countries balance environmental/health and economic needs, and do not constitute trade barriers or discriminatory practices (NRCan, IC, DFAIT, Environment Canada [EC], Health Canada);
- ensure that international health and environmental exercises affecting the industry and trade are based on sound science, and do not propose policies that unnecessarily restrict production, processing, marketing, trade, use and disposal/recycling of mineral and metal commodities (NRCan, IC, DFAIT, EC, Health Canada);
- promote further tariff reductions in European and Japanese markets (DFAIT, NRCan, IC); and
- pursue technical or regulatory issues with countries that are important markets or competitors, or with countries that are potential allies or opponents on policy. For example, the federal government will continue to support bilateral minerals and metals working groups with countries such as the United States, Mexico, China, Korea, and of the EU, and work on its relations with Japan (NRCan, IC, DFAIT).

Market Transparency and Intelligence

The Government, in co-operation with industry, will:

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

- use information networks and arrange missions to obtain accurate and timely market intelligence on other countries' supply, scientific and technological capabilities, and to identify investment and market opportunities (NRCan, IC, DFAIT);
- use bilateral minerals and metals working groups and other bilateral mechanisms to obtain market and statistical information from countries like China and the FSU republics that may represent market competition or opportunities for Canadian industry (NRCan, IC, DFAIT); and
- use bilateral and multilateral activities to access geoscience information on mineral deposits in other countries that may have undiscovered analogs in Canada, and to provide intelligence about exploration potential and developments in other countries (NRCan).

Trade Promotion

The Government, in co-operation with industry, will:

- support trade promotion activities for smaller industrial minerals with export potential such as dimension stone and peat moss (NRCan, DFAIT, IC);
- use its bilateral minerals and metals working groups and other mechanisms to obtain market information and identify export opportunities through activities such as missions, and working with Canadian missions abroad, provinces and industry (NRCan, IC, DFAIT);
- support activities to promote the use of Canadian sulphur in countries that use pyrites for the production of sulphuric acid, particularly China (NRCan, DFAIT, IC); and
- target activities on behalf of minerals and metals companies at the Pacific Rim countries, including Japan, China and Korea, the Middle East, and Latin America, including Mexico (NRCan, IC, DFAIT).

Investment and Competitiveness

The federal government continues to monitor and evaluate Canada's international competitiveness as a destination for investment in the

minerals and metals industry.¹ It maintains a state-of-the-art geoscience knowledge base in support of mineral exploration in Canada. It also manages a program of international mining investment seminars and participates in international forums to promote investment in Canada.

During 1996-97, the Government, in co-operation with industry and the provinces, will:

- conduct seminars and participate in international mining events in financial/mining centres of the Pacific Rim, Europe and North America to disseminate information on Canada's investment climate and geological potential, and to introduce Canadian firms to interested foreign investors (NRCan, DFAIT);
- provide intelligence on exploration potential and developments in other countries (NRCan);
- monitor investment climate changes in countries that are, or have, the potential to become major mineral producers, and assess the need to adjust domestic policies (NRCan, DFAIT); and
- conduct comparative studies to evaluate the global competitiveness of the Canadian minerals and metals industry (NRCan, IC, DFAIT).

Part 2: Steel Industry

This industry sector covers primary steel producers as well as firms manufacturing steel pipe and tubes, and steel wire and wire products.

Canadian Position

- Primary steel producers are the largest component of this sector. In 1994, the sector was made up of about 330 establishments² employing 47 800 people.
- Domestic shipments totalled \$9.5 billion and imports were \$4.9 billion. Export sales as a percent of total sales are greatest in the wire and wire products subsector with 50 percent of total sales being exported. In the other two subsectors, export sales amount to about 30 percent of total sales.

¹ Copies of these studies may be obtained by contacting the Economic and Financial Analysis Branch, Mining Sector, NRCan, 460 O'Connor Street, Ottawa K1A 0E4.

² Industry Canada estimate.

- Sector strength is in high-quality, value-added products for select markets and customers. The sector is also well positioned to compete within its prime market area, North America.

- Canadian industry and government have been pursuing the amendment of trade remedy laws with their industry counterparts in the United States and Mexico and with government officials in Canada and the United States. Lack of progress on this key issue has been a disappointment for this sector.

International Environment

- Exports in the steel sector totalled \$4.22 billion in 1994, up from \$2.74 billion in 1988. Exports to the U.S. represent 92 percent of the value of all exports. Major non-U.S. export markets are Mexico, South Korea and China.

- While this sector is mature in most industrialized countries, production and employment is growing in Asia (particularly China, Taiwan and Korea) and Central and South America, particularly Brazil, and Mexico.

- Canadian firms face ongoing pressures to reduce costs and improve productivity. These pressures are aggravated by excess steel-making capacity in too many countries, the emergence of new competitors and the cyclical nature of the industry. Central and Eastern Europe and the FSU have recently emerged as major new exporters.

- International environmental issues with trade implications are an evolving challenge for the industry.

Main Challenges

Major international issues for the Canadian steel sector include:

- market access issues, particularly trade remedy actions, within the NAFTA area;
- competitive pressures from producers in other countries;
- multilateral environmental activities affecting trade in steel scrap; and
- promoting export opportunities in overseas markets for small and medium-sized manufacturers.

Strategic Direction

Market Transparency

The Government, in co-operation with industry, will:

- continue to participate in international organizations that follow national and world supply and demand conditions in the steel and related industries (IC, DFAIT); and
- monitor closely the prices and levels of steel imports into Canada and their possible impact on the Canadian market (DFAIT, IC, Department of Finance).

Trade Promotion

The Government will work to develop:

- electronic directories that list firms' capabilities for sourcing Canadian manufactured goods (IC, DFAIT); and
- sector-specific information products containing foreign market intelligence reports, production and shipment data and contacts in such markets (IC, DFAIT).

Market Access

The Government, in co-operation with industry, will:

- support development and implementation of amended trade-remedy laws and procedures that would apply to intra-NAFTA trade (DFAIT, Finance, IC); and
- ensure that environmental regulations affecting steel trade are based on sound science and do not place unnecessary restrictions on the sale of non-hazardous wastes (NRCan, EC, IC, DFAIT).

Investment and Competitiveness

The Government, in co-operation with industry, will:

- develop sector frameworks to monitor the international competitiveness of the industry (IC);

- review elements of Canada's regulatory framework that may affect the international competitiveness of the Canadian steel sector (IC, Finance, DFAIT); and
- assist industry associations by promoting their involvement in trade-related activities (IC, DFAIT).

Part 3: Aluminium Industry

The aluminium sector is made up of firms engaged in the production of primary aluminium from alumina as well as recycled (secondary) aluminium, semi-fabricated products such as sheets, rods, cable, powders, castings, pipes and tubes, and extrusions such as profiles and automotive trims.

Canadian Position

- Canada's aluminium industry, the third largest in the world, includes large smelting companies and many smaller semi-fabricating firms. In 1994, it had about 100 establishments³ employing some 23 000 people.
- Shipments of primary and semi-fabricated aluminium products in 1994 were worth \$5.9 billion,⁴ of which about 32 percent was destined for the Canadian market. Imports amounted to \$1.4 billion. The primary aluminium industry is heavily export oriented, with 80 percent of 1994 production sold abroad.
- The semi-fabricated aluminium segment of the industry is concentrated in Ontario and Quebec, which together account for some 80 percent of shipments, or \$1.6 billion. Traditional competitors of Canadian semi-fabricators are often larger and more efficient U.S. plants.
- The strength of the Canadian industry lies in its high-quality, competitive products for selected market niches. Semi-fabricated goods tend to have a relatively low value per unit of weight, so shipping is a significant factor in final costs. The industry is potentially vulnerable to competition from South American countries, which have lower transportation costs, and foreign state-owned competitors benefiting from subsidized prices and preferential policies.

³ Industry Canada estimate.

⁴ Industry Canada estimate.

International Environment

- The value of exports grew at an average annual rate of more than 6 percent between 1987 and 1993. In 1993, exports to the U.S. of \$2.9 billion worth of aluminium products represented 49 percent of total shipments. Exports to other countries totalled \$1.1 billion, or 19 percent of total shipments. Principal non-U.S. export markets were the European Union (54 percent of non-U.S. exports), Japan (25 percent) and South Korea (8 percent).
- Market globalization and constant price pressure will continue to force readjustment of the industry, particularly the primary segment. Since 1990, exports of primary aluminium from the FSU have grown dramatically to more than 2 million tonnes in 1994. This had a negative impact on world prices, but improvements initiated in 1994 were partly maintained in 1995, following voluntary restraints negotiated with Russia in the context of the multilateral memorandum of understanding (MOU) on aluminium.
- Russia and other FSU republics, with their combined population of 285 million and a per-capita aluminium consumption less than 15 percent of North America's, will gradually reduce future exports of aluminium as their economic situation improves.
- Under the terms of the Canada-U.S. Free Trade Agreement (FTA), U.S. tariffs on aluminium products are less than 1.6 percent as of January 1, 1995; tariffs on primary aluminium products are at zero, and tariffs on semi-fabricated aluminium products will be reduced to zero by January 1998. Under the NAFTA, all Mexican tariffs will be at zero by January 2003.
- Canada's major trading partners have relatively high tariffs on aluminium products. With the exception of its tariff on waste and scrap, EU tariffs range from 6 percent on primary aluminium to 10 percent on semi-fabricated products. Japan's tariffs vary from 1 percent on primary aluminium to 11.5 percent on semi-fabricated products.

Main Challenges

Key challenges for the Canadian aluminium industry include:

- ensuring availability of statistical data on foreign markets;
- disseminating information on opportunities in foreign markets for semi-fabricated products, and on firms' capabilities in support of sourcing enquiries originating from Canadian trade missions abroad;
- ensuring fair market access for Canadian aluminium exports; and
- promoting additional investment and growth in the Canadian aluminium sector.

Strategic Direction

Market Transparency

The Government, in co-operation with industry, will support:

- promotion of international co-operation regarding essential industrial and trade statistics on primary aluminium, particularly with Russia and other FSU republics (IC, DFAIT); and
- the rapid integration of the FSU aluminium industry into the world economy (DFAIT, IC).

Trade Promotion

The Government will endeavour to:

- develop electronic directories and systems for more efficient sourcing of Canadian manufactured goods (IC, DFAIT);
- develop sector-specific electronic information products containing market intelligence reports, contacts, etc. (IC); and
- propose a pre-competitive marketing initiative to promote Canadian suppliers of equipment and services for the global aluminium industry (IC, DFAIT).

Market Access

The Government, in co-operation with industry, will:

- monitor foreign sales of aluminium products in Canadian export markets to identify possible unfair trade practices (IC, DFAIT);

- oppose unfair trade practices such as the unilateral tariff increases resulting from the recent expansion of the European Union (DFAIT, IC); and

- defend Canadian interests regarding international environmental and health-related exercises that may affect aluminium trade (DFAIT, IC, NRCan, EC).

Investment and Competitiveness

The Government will continue to work with industry to:

- assess Canada's regulatory framework to ensure it does not impact negatively on international competitiveness and the investment climate (IC);
- develop sector competitiveness frameworks to monitor the international competitiveness of the industry (IC); and
- strengthen sector industry associations and increase their participation in trade-related activities (IC).

Part 4: Metals and Minerals Industry Related Equipment and Services

Canada's large metals and minerals industry has spawned a cluster of supporting enterprises that have become part of a major Canadian high-tech industry. This sector is made up of producers of mining, mineral exploration and remote sensing, processing and environmental equipment and controls, and consumable products as well as providers of engineering, maintenance, earth sciences, surveys, analyses, transportation, software, education and training, and management services.

Canadian Position

The services and equipment segment of the Canadian minerals and metals industry is made up of numerous small and medium-sized enterprises (SMEs), statistics on which are limited. Many companies provide equipment and services that extend beyond minerals and metals, serving the oil and gas, hydro-electric, environment and civil engineering industries.

- Suppliers to the minerals and metals industry are increasingly aware of the need to expand their export orientation, and the Canadian Association of Mining Equipment and Services for Export (CAMESE) has quadrupled its membership over the last two years to 110, about one third of potential exporters.
- According to CAMESE, the industry consists of about 600 companies, many with annual sales of less than \$0.5 million and a few with sales of \$100 million. The average firm employs 25 people and generates annual sales of approximately \$2 million. The industry has total sales of about \$1.2 billion and direct employment of 15 000. The industry markets its equipment and services in Canada and in more than 50 other countries. Some 50 percent of Canadian goods and services for the mining industry are exported, and around 50 percent of companies in the sector export or produce exportable equipment and services.
- Firms are scattered across Canada, with Ontario being the leading province, followed by British Columbia and Quebec. They often locate close to mining activity, and are significant to the economies of northern communities.
- A number of large Canadian multinational mining companies have major R&D programs to develop automation advances for mining. This is placing Canada at the leading edge of technology and has already led to development of a new generation of exportable equipment. Continued R&D funding, along with linkages to the equipment industry, should, in time, result in more exports.
- Canada exports more consulting engineering services per capita than any other country, and the minerals and metals-related consulting engineering segment is particularly strong.
- For the largest Canadian consulting engineering firms, export sales may represent 50 percent to 80 percent of billings. Their global exposure provides Canadian machinery and instrumentation manufacturers with access to export markets. Among the largest firms are SNC Lavalin, Golder Associates, Monenco Agra, Acres, Kilborn, and Hatch Associates.

International Environment

Internationally, Canada is highly regarded as a provider of technology, particularly its commodity producers (see Part 1), exploration services, consulting engineering, including environmental protection, and related product niches.

- There are limited hard data on the size of the international markets for these industries. The world market for mineral exploration services is estimated at \$2 billion with Canadian firms holding about a 30-percent share and completely dominating the \$300-million Canadian market.
- Canada is a world leader in several areas, one being airborne geophysics in which Canada has captured 70 percent of the world market for surveys, and 60 percent for equipment, software and data interpretation.
- The world market for mineral and metal production and processing equipment is dominated by a handful of large firms, mostly from the U.S., Japan, Sweden and Finland. This is particularly true for the heavy equipment used in primary mineral extraction, handling and processing. Canadian firms have developed niches of excellence within this market, but do not generally offer a complete range of products for export. Canadian equipment exports are doing particularly well in South America.
- International mining investment, including that of Canadian companies, is moving toward non-traditional destinations, especially developing countries. Typically lacking equipment and services suppliers, these countries rely heavily on imports, creating opportunities for exporters from developed countries such as Canada. To prosper and expand, Canadian equipment and services exporters need to look beyond mature exploration and mining markets and pursue these opportunities.

Main Challenges

To strengthen its performance, the industry faces the following challenges:

- small Canadian companies will not always have sufficient resources to spread their export efforts over some 50 to 60 potential foreign markets; and
- coping with a stable domestic market that provides few growth opportunities.

Strategic Direction

Trade Promotion and Market Intelligence

The federal government, in co-operation with the provinces and industry, notably CAMESE, will:

- identify foreign markets that offer the best export opportunities and should be considered priorities for trade promotion (DFAIT, NRCan, IC, CAMESE);
- use networks and linkages such as bilateral minerals and metals working groups to gather information on export opportunities, industry structure and practices in priority countries and to promote Canadian equipment and services (DFAIT, NRCan, IC);
- participate in multilateral development aid projects (World Bank, Asia Development Bank, United Nations Development Program, etc.) where government involvement may lead to contracts for Canadian industry (NRCan);
- showcase Canadian technologies and capabilities in domestic and international forums, and promote the export of products and services based on Canada's innovative technologies (NRCan, IC, DFAIT);
- assist transfer of technologies or applications developed in government labs, or those of foreign firms, to Canadian companies (NRCan);
- provide export training to smaller firms to help them develop international marketing skills and strategies (provinces, CAMESE);
- ensure that Canada offers competitive financing packages in support of Canadian consulting firms bidding for large foreign mining projects, as well as in support of Canadian firms bidding for foreign equipment procurement (Export Development Corporation [EDC], CAMESE, DFAIT); and
- work with industry associations to collect information on foreign markets and to encourage Canadian companies to participate in major trade shows in order to increase Canadian exports for mining equipment and services (NRCan, DFAIT, IC).

Priority regions include Latin America (Chile, Peru, Brazil, Venezuela, Guyana, Bolivia, Argentina and Cuba), Asia-Pacific (Australia, India, Indonesia, Philippines, China), and selected countries in Africa, mostly in southern Africa.

Contacts

Natural Resources Canada
Mineral and Metals Commodity Branch
580 Booth Street
Ottawa K1A 0E4
Tel: (613) 992-3084
Fax: (613) 992-5244

Industry Canada
Metals and Minerals Processing Branch
235 Queen Street, 9th Floor East
Ottawa K1A 0H5
Tel: (613) 954-3176
Fax: (613) 954-3079
Internet: ethier.chuck@ic.gc.ca

Department of Foreign Affairs
and International Trade
Trade Opportunities Division
125 Sussex Drive
Ottawa K1A 0G2
Tel: (613) 992-7722 (equipment)
(613) 996-4209 (product)
Fax: (613) 943-8820 (equipment)
(613) 943-1103 (product)

| Activity | Date | Location | Dept. | Contact |
|--|-------------|--------------------------|--------------|----------------|
| Africa and the Middle East | | | | |
| Electra Mining '96: Info Booth | 30-Sep-96 | Johannesburg | DFAIT | 613-944-6590 |
| PDAC: Mission from the Middle East | 10-Mar-97 | Toronto | DFAIT | 613-944-5984 |
| Asia-Pacific South | | | | |
| Asia-Pacific Mining '96: CAMESE Info Booth | 01-Aug-96 | Bangkok | CAMESE | 905-513-0046 |
| International Investment Promotion Seminars | 01-Apr-96 | Asia-Pacific South | NRCan | 613-992-5873 |
| Mine and Quarry Australia: Info Booth | 01-Aug-96 | Singleton | DFAIT | 613-995-7652 |
| Building and Construction Indonesia '96: Info Booth | 10-Sep-96 | Jakarta | DFAIT | 613-992-0959 |
| Diamond Mission | 01-Mar-97 | Western Australia | NRCan | 613-992-3074 |
| Central/Eastern Europe and the Commonwealth of Independent States | | | | |
| Diamond Mission | 01-Jun-96 | Moscow/Mirny | NRCan | 613-992-3074 |
| Potash Mission | 21-Jun-96 | Moscow/Minsk | NRCan | 613-992-3733 |
| Copper Mission from Russia | 01-Apr-96 | Ottawa/ Toronto/Other | NRCan | 613-992-4481 |
| East Asia | | | | |
| International Geological Congress: CAMESE Info Booth | 04-Aug-96 | Beijing | CAMESE | 613-996-7256 |
| Mining China '96: CAMESE Info Booth | 18-Aug-96 | Beijing | CAMESE | 905-513-0046 |
| Mining Mission | 08-Jan-97 | New Delhi/Calcutta | DFAIT | 613-996-5903 |
| Mining Mission from India | 10-Mar-97 | Various Cities | DFAIT | 613-996-5903 |
| Europe | | | | |
| International Nickel Study Group | 17-Oct-96 | The Hague | NRCan | 613-992-7568 |
| India | | | | |
| AEG India 2nd International Seminar & Exhibition: CAMESE Info Booth | 26-Nov-96 | Hyderabad | CAMESE | 905-513-0046 |
| Japan | | | | |
| Industrial Minerals Mission | 15-Oct-96 | Tokyo/Seoul | NRCan | 613-992-3704 |

Note: Dates and locations are subject to change.

| Activity | Date | Location | Dept. | Contact |
|--|-----------|------------------|--------|--------------|
| Latin America and the Caribbean | | | | |
| Environment Technology Monitoring and Transfer | 01-Apr-96 | Georgetown | CANMET | 613-992-8736 |
| CAMESE Mining Mission | 01-May-96 | Mexico City | DFAIT | 613-995-8742 |
| Expomin '96: National Stand | 14-May-96 | Santiago | DFAIT | 613-996-5358 |
| Expomin '96: Mining Seminar and Solo Show | 21-May-96 | Lima | DFAIT | 613-996-4199 |
| Venezuelan Gold Symposium: Mission | 02-Oct-96 | Caracas | DFAIT | 613-996-5548 |
| Gold Mining Investment Opportunities: Mission | 07-Oct-96 | Georgetown | DFAIT | 613-943-8807 |
| PDAC: Mission from Brazil | 09-Mar-97 | Toronto | DFAIT | 613-996-5549 |
| PDAC: Mission from Argentina | 10-Mar-97 | Toronto | DFAIT | 613-996-5549 |
| PDAC: Mission from Chile | 10-Mar-97 | Toronto | DFAIT | 613-996-4199 |
| PDAC: Mission from Venezuela | 10-Mar-97 | Toronto | DFAIT | 613-996-5548 |
| Multiple Markets | | | | |
| PDAC: Information Booth and Seminar | 10-Mar-97 | Toronto | NRCan | 613-992-5873 |
| United States | | | | |
| Canada/U.S. Mines Working Group Meeting | 01-Apr-96 | Washington, D.C. | NRCan | 613-995-9571 |
| International Mining Conference: Investing in the Americas | 22-Apr-96 | Miami | NRCan | 613-995-9119 |
| MINExpo International '96: CAMESE Info Booth | 09-Sep-96 | Las Vegas | CAMESE | 905-513-0046 |
| Western Europe and the European Union | | | | |
| International Investment Promotion Seminars | 01-Apr-96 | Western Europe | NRCan | 613-992-5873 |
| Canada/European Union Metals and Minerals Working Group Meeting | 01-Dec-96 | Ottawa | NRCan | 613-996-0916 |

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)

DATE DUE
DATE DE RETOUR

| ACRONYM | DESCRIPTION | DATE DUE | DESCRIPTION |
|---------|---|--------------------|--|
| AAFC | Agriculture and Agri-Food Canada | | International Business Opportunities Centre |
| ACOA | Atlantic Canada Opportunities Agency | | Industry Canada |
| APEC | Asia-Pacific Economic Cooperation Forum | APR 4 - 1997 | International Development Research Centre |
| ASEAN | Association of South East Asian Nations | | international financial institution |
| BBS | Bank of Montreal | | International Standards Organization |
| BOOT | Build, Own, Operate, Transfer | | International Trade Advisory Committee |
| BOSS | Business Opportunities System | | International Trade Centre |
| CCC | Canada Council for the Arts | | Ministry of Agriculture, Fisheries and Food of Quebec |
| CIBS | Canada International Business Strategy | | multilateral development bank |
| CIDA | Canada International Development Agency | | multinational enterprise |
| CIS | Commonwealth of Independent States | | North American Free Trade Agreement |
| CSA | Canadian Standards Association | | North Atlantic Treaty Organization |
| DEAIT | Department of International Trade Affairs | | National Research Council |
| DFO | Department of Fisheries and Aquaculture | | Natural Resources Canada |
| DND | Department of National Defence | | Natural Resources Canada — Canadian Forest Service |
| EC | European Community | | National Sector Team |
| EDC | Export Development Corporation | | Organization for Economic Co-operation and Development |
| EU | European Union | CARR McLEAN 38-296 | Program for Export Marketing Development |
| FITT | Forum for International Trade Training | | R&D research and development |
| FORDQ | Federal Office of Regional Development — Quebec | | S&T science and technology |
| FSU | former Soviet Union | | SAGIT Sectoral Advisory Group on International Trade |
| FTA | Canada-U.S. Free Trade Agreement | | SME small and medium-sized enterprise |
| GATT | General Agreement on Tariffs and Trade | | UNEP United Nations Environmental Program |
| GDP | gross domestic product | | WED Western Economic Diversification |
| GNP | gross national product | | WTO World Trade Organization |
| HRDC | Human Resources Development Canada | | |



Acronyms and Business Strat

(This list does not inc

ernational

| | | | |
|-------|---|-----------|--|
| AAFC | Agriculture and Agri-Food Canada | IBOC | International Business Opportunities Centre |
| ACOA | Atlantic Canada Opportunities Agency | IC | Industry Canada |
| APEC | Asia-Pacific Economic Co-operation forum | IDRC | International Development Research Centre |
| ASEAN | Association of Southeast Asian Nations | IFI | international financial institution |
| BBS | electronic bulletin board system | ISO | International Standards Organization |
| BOOT | build, own/operate, transfer | ITAC | International Trade Advisory Committee |
| BOSS | Business Opportunities Sourcing System | ITC | International Trade Centre |
| CCC | Canadian Commercial Corporation | MAPAQ | Ministry of Agriculture, Fisheries and Food of Quebec |
| CIBS | Canada's International Business Strategy | MDB | multilateral development bank |
| CIDA | Canadian International Development Agency | MNE | multinational enterprise |
| CIS | Commonwealth of Independent States | NAFTA | North American Free Trade Agreement |
| CSA | Canadian Standards Association | NATO | North Atlantic Treaty Organization |
| DEAIT | Department of Foreign Affairs and International Trade | NRC | National Research Council |
| DFO | Department of Fisheries and Oceans | NRCan | Natural Resources Canada |
| DND | Department of National Defence | NRCan-CFS | Natural Resources Canada — Canadian Forest Service |
| EC | Environment Canada | NST | National Sector Team |
| EDC | Export Development Corporation | OECD | Organization for Economic Co-operation and Development |
| EU | European Union | PEMD | Program for Export Marketing Development |
| FITT | Forum for International Trade Training | R&D | research and development |
| FORDQ | Federal Office of Regional Development — Quebec | S&T | science and technology |
| FSU | former Soviet Union | SAGIT | Sectoral Advisory Group on International Trade |
| FTA | Canada-U.S. Free Trade Agreement | SME | small and medium-sized enterprise |
| GATT | General Agreement on Tariffs and Trade | UNEP | United Nations Environmental Program |
| GDP | gross domestic product | WED | Western Economic Diversification |
| GNP | gross national product | WTO | World Trade Organization |
| HRDC | Human Resources Development Canada | | |



INDUSTRY CANADA/INDUSTRIE CANADA



111713



Government
of Canada

Gouvernement
du Canada

Canada