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Construction Products and Services

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:*

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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Canada's building products and construction services industries include a wide variety of professional services and products, including: residential and non-residential construction; manufactured building products; construction contracting; home building; and architectural and engineering services. Total output is in excess of $90 billion annually, some 13 percent of gross domestic product (GDP), directly employing 600 000 Canadians. About two thirds of output is industrial, commercial and institutional products and services. The remaining one third is accounted for by high- and low-rise residential construction.

In this strategy, sector activities are grouped under three categories: construction services; wood-based building products; and metal and mineral-based building products.

Construction Services

The residential construction industry is made up of a full range of companies involved in the production and maintenance of housing, including: low-, middle- and high-rise site builders and renovators; manufacturers of housing; and service providers such as architects, engineers, developers and consultants.[1]

Canadian Position

The direct output of the domestic residential construction industry is approximately $15 billion annually, with one job in 12 directly or indirectly depending on new and existing residential construction. The Canadian housing market is served by thousands of firms ranging in size from very small builders to large firms, some with international experience.

Traditionally, the residential construction industry has concentrated on the domestic market. This is changing, however, as long-term domestic demand is being negatively affected by shifts in demographics and consumer incomes.

While existing methods of compiling statistics make it difficult to determine the value of exports of residential construction services, it is generally agreed that exports account for a small proportion of the industry's current business volume. Exports are growing in importance, however, and specific components of the industry are already very active in international markets. In 1994, exports of manufactured housing increased 100 percent to $170 million.

With the decline in domestic markets, the housing industry has shown a strong interest in increasing its international presence. The industry believes that Canada has world-class housing that is competitive in terms of price and quality in most markets. Many of Canada's housing technologies, products and services are appropriate or easily adapted to local conditions in most international markets.

Given its diverse nature, the industry has sought government assistance in developing and refining its export strategies. A Task Force involving Canada Mortgage and Housing Corporation (CMHC), Industry Canada (IC), the Department of Foreign Affairs and International Trade (DFAIT), the National Research Council (NRC) and Natural Resources Canada (NRCan) was established in 1994, to work with industry to develop a framework export strategy for the housing industry.

Extensive industry consultation has taken place and an industry-wide, strategic framework for Canada's housing exporters was developed in 1995. Research on international market opportunities, Canada's housing competitors, Canadian exportable housing technologies, and domestic sources of support for housing exporters has also been completed. The next phase of the Task Force's

1 Capital projects-related industries are discussed in detail in the Business, Professional and Educational Services section of *Canada's International Business Strategy* (CIBS).

work, in collaboration with the industry and other interested groups, is to develop export strategies for sub-components of the industry and for specific geographic markets.

International Environment

The international housing market presents many opportunities, resulting from:

- increased interest within established Western markets in less-costly housing production and renovation;
- the emergence of prosperous new industrial centres;
- growing demand from many countries for imported goods and services to meet their domestic housing needs;
- actions by many foreign governments to address inadequate or poor-quality domestic housing, and to support the development of market-oriented housing systems; and
- destruction of housing due to natural disasters and wars.

Many countries are challenged with providing housing for their rapidly growing populations, often without the financial resources from tax revenues to undertake these expenditures. Some countries are therefore increasingly willing to work with foreign investors and contractors to meet their housing requirements.

Opportunities exist in traditional and established markets such as Japan, Germany and the United States, and in emerging markets like China, Mexico, Russia and South Africa. Competition is also strong, however, from foreign companies that may be well established in these markets, or from local construction companies.

The intermediate markets, where less demand, strong competition in some sectors or substantial trade barriers have resulted in fewer opportunities, include: South America (Argentina, Chile); Cuba; Western Europe (Belgium, Ireland, Italy); Eastern Europe and the Commonwealth of Independent States (CIS) (Poland, Czech Republic, Hungary, Ukraine); Middle East (Lebanon, Palestinian Authority); Asia (South Korea, Taiwan, India); and Australia.

The most active international housing markets are dominated by firms from a few countries, with United States-based firms being prominent in almost all key international housing markets. Canada also faces competition from the British, French, German, Italian, Korean and Japanese companies with major regional interests. Other competitors with a track record in housing exports and which are expanding their activities are Austria, Denmark, Finland, the Netherlands, Sweden and Turkey.

Main Challenges

- The international housing marketplace is very competitive, with companies from many countries. Canadian firms typically are small by comparison and unorganized as groups, often competing with each other for the same projects.
- Governments are facing financial constraints and seeking ways to increase private-sector financing of projects. For many projects, however, the potential client has limited ability to pay for products or services.
- Given the long-term nature of many housing and capital projects, and the associated long lead times that are required, companies need the resources to stay in a market for a considerable length of time.
- Competition can be intense in countries with large domestic housing industries that have met local needs for many years. Also, housing construction is an industry with easy entry requirements in terms of capital and skilled personnel, which results in many competitors.
- Market entry is often impeded by local building and fire codes, product standards and approval processes, regulatory environments and technical requirements.
- All service firms face substantial costs to establish and maintain a presence in foreign markets.
- Market information and intelligence is difficult to collect for many faraway markets.
- Many firms are not well informed about potential export opportunities, and need up-to-date market information and intelligence.

• Many firms, with imprecise knowledge of available support and resources and uncertainty about how to pursue specific export opportunities, need formal export training.

Strategic Direction

While targeted primarily to new exporters and exporters venturing into new markets, the strategic framework for Canada's housing exporters also contains elements of potential help for existing exporters.

The main elements of the strategy are export awareness, export readiness, international profile and recognition, and international acceptance and performance.

The Task Force will work toward implementing the strategy in the following areas:

• Collaborating with industry to help exporting firms better address international housing opportunities by:

– developing export strategies for the three major segments of the residential construction industry: manufacturers of housing and components; builders and renovators; and housing-related services providers;

– developing specific export market strategies with primary emphasis on the United States, Japan and Western Europe; and

– developing strategies for emerging markets in China, Mexico, Russia and South Africa.

• Increasing the industry's export awareness and readiness by:

– distributing the overview that was developed in 1995 of sources of support for Canada's housing exporters;

– investigating the feasibility of establishing a 1-800, one-stop shopping service to facilitate industry's access to export-related information and advice;

– undertaking research to determine commercial housing opportunities and technical impediments to trade in priority and emerging markets such as the United States, Japan, Germany, Mexico and China;

– developing export guides for specific priority markets to inform potential exporters of the key aspects of doing business in those markets; and

– distributing information products via the Internet, bulletin board systems, and hard copy.

• Increasing the industry's international recognition and acceptance with an emphasis on priority markets, by:

– improving the international profile of the housing industry through distribution of the overview developed in 1995 of Canadian exportable housing technologies, products and services;

– increasing the housing industry's awareness of DFAIT's WIN Exports database, and encouraging more firms to list their products and services on the database;

– providing non-financial government support for industry promotion in foreign construction trade shows and incoming and outgoing missions; and

– continuing government promotion of the industry by establishing working relationships with foreign housing agencies, regulatory authorities and international buyers, and by advocacy with international financial institutions (IFIs) such as the World Bank.

• Improving the industry's export performance to the following targets:

– 20-percent increase in export-active firms in the next three years;

– increasing Canada's housing export volume in both existing and new markets beyond the federal annual growth target of 10 percent for all Canadian exporters within the next five years; and

– doubling Canada's current share of international housing-related business.

Note: These targets will be refined for specific components of the industry and for geographic markets as sector- and market-specific strategies are developed.

A National Housing Team made up of Task Force members, industry, and other relevant federal and provincial governments, is being established. It will help plan and launch international business development initiatives for the residential construction industry, including those noted above.

Wood-based Building Products

The wood-based building products industry consists of firms that manufacture a variety of products and components, including kitchen cabinets, windows, doors, millwork, wood flooring, solid wood panelling, mouldings and prefabricated housing.

Canadian Position

This industry sector includes more than 5000 manufacturers from all regions of the country. Canadian exports of wood and building products used in construction surpassed $12 billion in 1994. Export success to date has been primarily in the developed world — the United States, Japan and Western Europe. The introduction and acceptance of wood-frame construction in these international markets has enabled the export of some related wood and non-wood construction products and services.

The industry is attempting to develop foreign sales to make use of excess plant capacity and maintain employment and profitability. Organizations such as the Canadian Manufactured Housing Association and the Canadian Home Builders' Association are collaborating with the federal government on the Housing Export Strategies Task Force to devise co-ordinated, industry-led trade development strategies. Provincial governments and other organizations such as the B.C. Wood Specialties Group, the Council of Forest Industries and le Bureau de Promotion des Industries de Bois have also directed significant resources to the development of international markets.

International Environment

Worldwide trade in building products was estimated at some $200 billion in 1994. Canada's share of that trade is over $12 billion, mostly in commodities. More than 85 percent of annual value-added wood building products exports are to the United States. However, Canadian exports have started to gain market share in Japan.

The Japanese construction market is the largest in the world, with some 1.45 million housing and apartment unit starts annually. Internationally, Canadian manufacturers compete against building products manufacturers from the United States, Western Europe, Scandinavia and Japan.

Traditionally, building products exports have been heavily weighted in favour of commodities. But with increasing emphasis on job growth and expanding the base of entrepreneurial small and medium-sized enterprises (SMEs), value-added building products manufacturing and exporting are now becoming increasingly important.

With the gradual shift in emphasis from commodities to value-added products in priority markets, a 5-percent to 10-percent growth in export sales of wood and non-wood building products can be expected for the short and medium term. Also, exports of new engineered wood and panel products to priority markets should show reasonable growth in the near future.

Main Challenges

Company Size

Most Canadian building products firms are quite small, produce similar standard products and operate in localized domestic markets. Foreign competitors are often much larger companies with more comprehensive product lines and greater promotional resources. Small Canadian firms suffer the disadvantage of limited resources

Table 1
Canadian Wood-based Building Products Industry

Product	Shipments (1994)*	No. of establishments (1993)	Employees (1993)	Exports (1994)*	Imports (1994)*
Mobile Homes	198	18	1 561	6	0
Windows/Doors	1 165	326	10 842	115	73
Factory Housing	338	88	2 530	88	5
Kitchen Cabinets	862	693	9 977	154	33
Other Millwork	1 162	368	9 174	388	224
Total	3 725	1 493	34 084	751	335

** $ million*

to gather market intelligence and little experience in promoting products abroad.

Market Access

The Canadian standards regulatory environment is a major factor in the international competitiveness of building products and systems. A long-term objective is international recognition of codes, standards and conformity assessment.

A building products Mutual Recognition Agreement (MRA) is now in place with Japan. It is intended to reduce duplication in testing requirements and to designate Canadian agencies as Foreign Testing Organizations, which are authorized to carry out testing to Japanese requirements.

Strategic Direction

Networks of key organizations in the federal and provincial governments and the private sector are being established. These National Sector Teams will be the primary instruments for planning and launching international business development initiatives. The Government intends to work with the National Sector Team for Building Products to address the following challenges:

Helping small companies compete internationally

- Some small firms have overcome the impediment of size by working co-operatively or in networks to combine their resources to market complementary products and services. Canadian manufactured housing companies are already beginning to work together in this manner. To help expand international market opportunities for Canadian building product SMEs, the Canadian Building Products Export Council will be established (IC, Canadian Exporters' Association, industry organizations).
- Over the next several years, the National Sector Team will work with industry associations and clusters of SMEs to promote co-operative efforts in identifying and penetrating target markets (IC, DFAIT).
- Generic marketing tools need to be developed that can be used by government and the private sector to cost-effectively promote business development abroad. Sector teams will determine how best to integrate and use resources to provide the most cost-effective international promotion of the industry (IC, DFAIT).

Consultations with individual companies, associations and provincial representatives

- Due to the large number of building products events held each year, it is important that government, in partnership with industry, focus on key targeted events in order to gain the maximum exposure from limited resources (IC, DFAIT).

Geographic Priorities

- United States: The U.S. is the world's largest market for building products and will remain a priority for Canadian firms in this sector. The Government will continue to focus its promotion and investment prospecting efforts there by developing regional strategies for niche market expansion and diversification. Maintaining and expanding market share in the U.S. will be the priority (IC, DFAIT/missions).
- Japan: Exports to Japan, Canada's largest offshore market for building products, exceed combined sales to all European countries. Growth potential for three-storey wood-frame construction and finished building products remains to be developed. Greater access to the building products and manufactured housing market will be a key priority, along with implementation of the 1994 Canada-Japan Joint Announcement for the Mutual Recognition of Building Product Standards (IC, DFAIT/missions).
- Western Europe: The objective will be to maintain Canada's visibility and increase the number of exporters to this rich and sophisticated market where Canadian products and technology have made inroads (IC, DFAIT/missions).
- Central and Eastern Europe: Fifty years of economic hardship have created a huge market for both new housing and renovation in this region. Housing needs are pressing and can be satisfied rapidly by Canadian manufactured housing technology and building materials. As the economic situation improves and purchasing power grows, opportunities will emerge for Canadian firms to increase their presence in the market (IC, DFAIT/missions).
- Asia-Pacific and Emerging Markets: Moderate growth could result from the development of niche market opportunities in the Asia-Pacific region. In emerging markets, acceptance of Canadian building codes and standards could help open new markets for building products (IC, DFAIT/missions).

The present level of trade development emphasis in Europe and Asia-Pacific will be maintained. In emerging markets such as Central and Eastern Europe, China, Latin America and South Africa, emphasis will be focussed on exchanging technological and building code know-how, technical publications and promotional materials (IC, DFAIT/missions). (See also the Forest Industries chapter in *Canada's International Business Strategy*.)

Metal and Mineral-based Products

The metal and mineral-based construction products industry is made up of companies that manufacture products such as nails, aluminium siding, metal doors and windows, metal buildings, cement, gypsum wallboard, mineral wool insulation, clay brick and building stone.

Canadian Position

There are now 6000 establishments in the metal and mineral-based construction products sector, employing nearly 145 000 people. Most are SMEs, but there are some major firms in the metal fabricating, cement, insulation and flat glass industries, notably, Dominion Bridge Company, Lafarge Canada Inc., Fiberglas Canada Inc., and AFG Glass Inc. Many of the larger companies are foreign internationals.

In 1994, exports were estimated to be $1.51 billion (see Table 2). While there is a substantial increase over last year, this is due to the use of different categories of measurement that include additional subsectors and products. The major export market continues to be the United States, which absorbs almost 85 percent of the total. Overall, exports are markedly higher than imports, which were $1.05 billion in 1994.

Construction products manufacturers have traditionally concentrated on the domestic market, but recent slowness has resulted in more emphasis on exporting.

In markets such as Japan, the price of Canadian metal and mineral-based construction products is very attractive compared to local prices. High transportation costs, trade barriers and differences in codes and standards in other countries are deterrents to trade, but progress is being made to minimize these constraints.

International Environment

The United States Department of Commerce reported in the Winter 1995 edition of *Construction Review* that total U.S. non-wood building materials imports for a broad group of products rose about 24 percent to US$5.1 billion in 1994. More than 40 percent of the imported building materials came from Canada and Mexico. The U.S. will continue to be the major market over the next five to 10 years.

Argentina, Chile and Colombia have experienced rapid growth in construction activity since 1990. The large Mexican market has also grown impressively, although there are signs that growth has faltered since the Mexican currency crisis. The possibility of free trade agreements with Latin America promises future sales of construction products to this area.

The Japanese home building recovery continues, although the rate of increase has slowed. In 1994, housing starts in Japan totalled 1.57 million units, which was 6 percent higher than in 1993. More than half the starts were in non-wood structures. As the MRA is gradually phased in, however, exports to Japan of metal and mineral-based construction products are expected to increase.

There are export opportunities in Hong Kong for steel and aluminum curtain wall systems, aluminum and steel windows and doors, metal plumbing fittings and sanitary ware.

China has set a goal for the first decade of the next century to provide dwellers with a per-capita living space of about 103 square feet, an increase from the current 83 square feet. With this increase and a growing population, total residential housing growth will be exceedingly high.

Main Challenges

- Canada's non-metallic industry needs to improve its worldwide trade deficit in ceramic tiles, flat glass, insulation, finished stone products and fabricated glass products.

- The main challenges in Latin America are economic downturn and market access. Although Mexico is a member of the North American Free Trade Agreement (NAFTA), trade with Canada in the construction sector has not been significantly affected, even though both countries have well-established construction industries. Moreover, Canadian companies have been reluctant to venture into Mexico since the currency crisis of early 1995.

• In Hong Kong, the main challenges include: transportation issues such as those concerning distance, freight forwarders and customs agents; the uncertainty of the post-1997 market; and intense competition from a very high concentration of foreign suppliers.

• To capitalize on the demand for low-cost housing and small-scale infrastructure in South China, exporters must deal with cultural differences and unusual building codes as well as a traditional reliance on brick and concrete construction.

Table 2
Metal and Mineral-based Construction and Building Products, 1994

	$ million			
	Exports*		Imports*	
Metallics				
Doors & Windows	81	(66)	53	(50)
Ferrous Structures & Structural Parts	179	(145)	100	(86)
Non-ferrous Structures & Structural Parts**	28	(22)	20	(18)
Sheet Piling	19	(10)	14	(7)
Profiles, Hollow, Aluminum**	25	(25)	9	(9)
Sanitary Ware	29	(18)	16	(8)
Pipes, Tubes & Fittings	116	(100)	77	(69)
Prefabricated Buildings	169	(48)	86	(83)
Nails, Staples, etc.	93	(93)	43	(23)
Total Metallics	740	(527)	418	(353)
Non-Metallics				
Cement	243	(242)	45	(45)
Insulation	148	(142)	172	(164)
Flat & Fabricated Glass Products	60	(56)	72	(49)
Asphalt Roofing	91	(82)	50	(49)
Concrete Products	97	(91)	188	(54)
Finished Stone Products	52	(44)	91	(39)
Gypsum Products	81	(80)	11	(9)
Other	5	(4)	6	(4)
Total Non-Metallics	777	(740)	636	(413)
Total Mineral-based Construction Products	1517	(1268)	1055	(766)

* *Figures in brackets denote trade with the United States.*
** *Figures are estimates.*

Source: Statistics Canada

Strategic Direction

• United States: Because of its size and proximity, the U.S. will continue to be the major export market for Canadian metal and mineral-based construction products. With many companies targeting the United States, visits through DFAIT's New Exporters to Border States (NEBS) program, market studies, trade fairs and incoming and outgoing missions will be highlighted (IC, DFAIT/missions).

Another important objective is to increase the visibility of Canadian metal and mineral-based construction products in other parts of the world that have rapidly expanding economies, including:

• Mexico: As a NAFTA partner, Mexico shows considerable potential for construction products. Current financial and economic conditions, however, have led the Canadian private sector to reassess its strategy and business relationships. Stronger economic growth is needed before normal business involvement and activities can be resumed. Nonetheless, attention will be paid to non-residential construction of larger structures for the tourism sector, in particular.

• Japan: Full implementation of the MRA on building products standards is a major long-term strategic goal, with significant potential to enhance access for Canadian firms to the Japanese market. Non-financial government support will be provided for trade shows and other promotional endeavours, such as the inclusion of leading Canadian steel housing companies in the new Japanese-language edition of the *Manufactured Housing Directory*.

• China: This market is considered one of the most promising in the world for Canadian construction products. Despite the austerity policy of the central government, the need for construction products in China remains high. The focus will shift to low-priced ordinary housing, hotels, business buildings and the renovation of older parts of cities. Initial steps are being taken to develop civil and structural engineering projects through strategic participation in construction trade shows and the organization of seminars in major Chinese cities (DFAIT/missions, IC).

• Hong Kong: As building materials and construction services make up one of the more commercially interesting sectors in Hong Kong, new exporters will have to work with traders and freight forwarders to breach the distance from Canada. However, as of 1997, exporters will also depend on the Canadian government's ability to maintain close trading ties with this future city of the People's Republic of China (DFAIT/missions, IC).

References

Industry Canada publications are available by contacting your regional office: call 1-800-667-3355 for locations, or Ottawa (613) 947-7466.

Reference publications include:
NAFTA and the Construction Materials Sector;
Building Abroad;
Exporting for Competitiveness.

Contacts

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Activity	Date	Location	Dept.	Contact
Asia-Pacific South				
Building and Construction Indonesia '96: Info Booth	10-Sep-96	Jakarta	DFAIT	613-995-8744
Building and Construction Vietnam '96: National Stand	17-Sep-96	Ho Chi Minh City	DFAIT	613-943-0897
Central/Eastern Europe and the Commonwealth of Independent States				
Buildtech: Buyers' Mission from Ukraine	01-Apr-96	Toronto	DFAIT	613-992-7001
Building Materials Mission to the Baltic Nations	01-Apr-96	Riga	DFAIT	613-992-7001
Construct Expo in Romania: Info Booth	22-Apr-96	Bucharest	DFAIT	613-992-7001
Construction NEXOS Mission	01-May-96	Budapest/ Prague/Warsaw	DFAIT	613-992-7001
East Asia				
IMEH '95 in China: Mission	13-May-96	Beijing	DFAIT	613-996-6987
Construction Industry Market Profile	01-Jun-96	Hong Kong/ Southern China	DFAIT	613-996-6987
Building Products Mission from China	15-Jun-96	British Columbia	DFAIT	613-996-6987
Construction and Housing Tech Seminars	21-Sep-96	Shanghai	DFAIT	613-996-6987
Construct Canada '96: Mission from Hong Kong	01-Nov-96	Toronto	DFAIT	613-996-6987
Taipei International Construction Show: National Stand	17-Dec-96	Taipei	DFAIT	613-943-0897
Building South China '97: Info Booth	01-Mar-97	Guangzhou	DFAIT	613-996-6987
Buyers' Mission from Taiwan	15-Mar-97	Vancouver/Calgary	DFAIT	613-943-0897
Japan				
Pre-Fabricated Housing Investment Study	01-Apr-96	Ottawa	DFAIT	613-995-1678
Housing Seminars/Workshops in the Kansai	01-Apr-96	Kansai	DFAIT	613-995-1678
Import Housing Centre and Model Park	01-Apr-96	Kansai	DFAIT	613-995-1678
Tokai Architects and Land Developers' Mission	10-May-96	B.C./Ontario	DFAIT	613-995-1678
Housing Mission from Fukuoka	01-Jun-96	Vancouver/Toronto	DFAIT	613-995-1678
Prefabricated Housing Seminar Series	01-Jun-96	Japan TBD	DFAIT	613-995-1678
Tokai Model House Seminar and Tour	01-Aug-96	Nagoya	DFAIT	613-995-1678
Building/Housing Fairs: Info Booths	01-Sep-96	Nagoya	DFAIT	613-995-1678
Kobe Interhome '96: Info Booth and Seminar	01-Sep-96	Kobe	DFAIT	613-995-1678
Regional Building Products Solo Shows	01-Sep-96	Japan TBD	DFAIT	613-995-1678
Buyers' Mission from Japan	25-Sep-96	Canada TBD	DFAIT	613-995-1678
Canadian Building Products Solo Show and Seminar	01-Nov-96	Kansai	DFAIT	613-995-1678
Japan Home Show: Info Booth	01-Nov-96	Tokyo	DFAIT	613-995-1678
High Humidity/Heat Building Products: Mission	01-Mar-97	Kumamoto/ Kitakyushu	DFAIT	613-995-1678

Note: Dates and locations are subject to change.

Activity	Date	Location	Dept.	Contact
Latin America and the Caribbean				
International Financial Institutions (IFIs) Project Summary Sheet	01-Apr-96	Bridgetown	DFAIT	613-943-8807
United States				
Architectural Mission	01-Apr-96	Pittsburgh	DFAIT	613-944-7486
Co-Sponsor Hardware/Building Show	01-Apr-96	Boise, ID	DFAIT	613-944-7486
Architects and Engineers Market Study	01-Apr-96	Washington, D.C.	DFAIT	613-944-7486
Logan Airport Project: Transportation Sector NEBS Seminar	01-Apr-96	Boston	DFAIT	613-944-7486
Residential Products Study	01-Apr-96	Los Angeles	DFAIT	613-944-7486
Building Materials/Hardware Market Study Update	01-Apr-96	Boston	DFAIT	613-944-7486
Building Products NEBS Mission	01-Jun-96	Boston	DFAIT	613-944-7486
Partners by Design Phase II: Conference	01-Jun-96	Washington, D.C.	DFAIT	613-944-7486
Alabama Council of the AIA '96 Convention and Expo: Mission	21-Jul-96	Birmingham	DFAIT	613-944-7486
Buyers' Mission from Atlanta	01-Aug-96	Canada TBD	DFAIT	613-944-7486
Pro-Spec '96: Info Booth	22-Aug-96	Seattle	DFAIT	613-944-7486
Product Representative Locator: Study	01-Aug-96	Washington, D.C.	DFAIT	613-944-7486
Residential Products Pamphlet: Promotion	01-Aug-96	Los Angeles	DFAIT	613-944-7486
National Hardware Show: National Stand	13-Aug-96	Chicago	DFAIT	613-944-7486
Building Products Market Study	01-Sep-96	Washington, D.C.	DFAIT	613-944-7486
Reverse NEBS from Minneapolis	01-Sep-96	Manitoba/ Saskatchewan	DFAIT	613-944-7486
Hardware Product Representative Locator: Study	01-Nov-96	Detroit	DFAIT	613-944-7486
Product Representative Locator: Study	01-Nov-96	Detroit	DFAIT	613-944-7486
Construct Canada: Mission from the U.S.	04-Dec-96	Toronto	DFAIT	613-944-7486
Michigan Lumber Builders and Manufacturers Association Show (MLBMA): Mission	01-Jan-97	Detroit	DFAIT	613-944-7486
Product Representative Locator: Study	01-Jan-97	Boston	DFAIT	613-944-7486
Northwestern Lumberman's Building Products: Info Booth	12-Jan-97	Minneapolis	DFAIT	613-944-7486
National Association of Home Builders (NAHB): National Stand	26-Jan-97	Houston	DFAIT	613-944-7486
Building Products NEBS Mission from Atlantic Canada	01-Mar-97	Atlanta, GA	DFAIT	613-944-7486
Canadian Architects and Engineers' Mission	01-Mar-97	Los Angeles	DFAIT	613-944-7486
Canadian Lumberman's Association Convention and Expo: Mission from the Southeastern U.S.	02-Jun-97	Montreal	DFAIT	613-944-7486
National Hardware Show: NEBS Mission	13-Aug-97	Chicago	DFAIT	613-944-7486

Activity	Date	Location	Dept.	Contact
Western Europe and the European Union				
Insulated Wood Windows: Study and Promotion	01-Apr-96	London	DFAIT	613-922-7001
Wood Panel Products: Study and Promotion	01-Apr-96	London	DFAIT	613-992-7001
Canadian Housing Technology Seminars	01-May-96	Magdeburg/Dresden/ Leipzig/Erfurt	DFAIT	613-992-7001
Architects and Builders' Mission	01-Jun-96	Canada TBD	DFAIT	613-992-7001
TurkeyBuild: Info Booth	01-Jun-96	Istanbul	DFAIT	613-992-7001
Habitat II: National Stand	03-Jun-96	Istanbul	DFAIT	613-992-7001
ScotBuild: Info Booth	10-Nov-96	Glasgow	DFAIT	613-992-7001

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 Agricul
ACOA Atlanti
APEC Asia-Pa forum
ASEAN Associa
BBS electro
BOOT build, c
BOSS Busines System
CCC Canadia
CIBS Canada Strateg
CIDA Canadia Agency
CIS Commo
CSA Canadia
DFAIT Departm Internat
DFO Departm
DND Departm
EC Environ
EDC Export I
EU Europea
FITT Forum f

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

International Business Opportunities Centre
Industry Canada
International Development Research Centre
international financial institution
International Standards Organization
International Trade Advisory Committee
International Trade Centre
Ministry of Agriculture, Fisheries and Food of Quebec
multilateral development bank
multinational enterprise
North American Free Trade Agreement
North Atlantic Treaty Organization
National Research Council
Natural Resources Canada
Natural Resources Canada — Canadian Forest Service
National Sector Team
Organization for Economic Co-operation and Development
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

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Acronyms an ternational
Business Stra

(This list does not in

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