

REGIONAL MARKETS OF THE

# UNITED STATES



A GUIDE FOR  
CANADIAN EXPORTERS

Canada 

  
Export  
Development  
Canada | Exportation et  
développement  
Canada

# About the Guide

This Guide is intended to provide small- and medium-sized Canadian exporters with practical information about doing business in the United States. We've taken a regional approach to the subject, for the following three reasons:

- ▶ First, treating the United States as a single enormous market isn't very useful. It's much more effective to see it as a mosaic of many different economic regions that can vary considerably in their demands and needs.
- ▶ Second, Canada maintains Consulates General in all these regions. Each consulate has a trade team that can help Canadian exporters seek out business opportunities in the region for which the team is responsible.
- ▶ Third, EDC is very familiar with the regional aspects of the U.S. market, and we're here to help Canadian businesses with trade financing, insurance and bonding, foreign-market expertise and a wide range of other services.

And remember, small business is big business at EDC. In fact, 90 per cent of our customers have annual foreign sales of less than a million dollars. So if you're a small business thinking about exporting to the United States, give us a call — you'll be in good company.

## Acknowledgements

EDC would like to thank the many officers of the Canadian Trade Commissioner Service across the United States who provided us with much of the information included here. Without their assistance, the task of compiling this Guide would have been much more difficult.

## How to Contact EDC

To find an EDC regional office near you, please refer to the Appendix.

This Guide is a compilation of publicly available information. It is not intended to provide specific advice and should not be relied on as such. This Guide is intended as an overview only. No action or decision should be taken without detailed independent research and professional advice concerning the specific subject matter of such action or decision. While EDC has made reasonable commercial efforts to ensure that the information contained in this Guide was accurate as of February 2008, EDC does not represent or warrant the accurateness, timeliness or completeness of the information contained in the Guide. This Guide or any part of it may become obsolete at any time. It is the user's responsibility to verify any information contained in this Guide before relying on such information. EDC is not liable in any manner whatsoever for any loss or damage caused by or resulting from any inaccuracies, errors or omissions in the information contained in this Guide. This Guide does not intend to and does not constitute legal or tax advice. For legal or tax advice, please consult a qualified professional.

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## A GUIDE FOR CANADIAN EXPORTERS

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# 1

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## THE EAST



## New England

### Maine, Massachusetts, New Hampshire, Rhode Island and Vermont

#### New England's market environment

Although New England has a combined population of only 10 million, Canada shipped more than \$21 billion\* worth of goods to the region in 2006. This makes it one of Canada's major trading partners, and its bustling economy and its openness to Canadian products and services make it a popular point of entry to the United States.

The bulk of New England's Canadian imports have traditionally been resource-based commodities, such as energy, lumber and wood products. However, the region's needs are rapidly becoming more diverse, and its economy is increasingly focussed on creating, selling and purchasing innovation, with a major emphasis on high technology. As a result, New England is very strong in research, development, technology transfer and commercialization. This should open up many opportunities for Canadian companies that are working at the leading edge in information and communications technology, pharmaceuticals, medical research and defence.

The New England market is somewhat unusual in that price doesn't always matter as much as it does elsewhere; the real key to being competitive here is innovation, and it's recognized that true innovation isn't cheap. As a result, you can often charge more for your service or product in this market, provided it's significantly more advanced or more effective than that of your competition. New England, in short, can not only afford innovation but also has the ability and desire to adopt it.

For an exporter, the region has several major attractions aside from its wealth and its innovation-driven economy. It has a highly educated labour force, a well-funded research community, plenty of venture capital to finance corporate growth, and a wide variety of strong industrial clusters.

#### Current and emerging opportunities

Traditional exports will remain a mainstay of Canada's trade with New England for the foreseeable future. But the region is home to some major high-technology sectors, and institutions and businesses in these industries are receptive to anything that will keep the local economy competitive.

- ▶ Energy (petroleum, electricity and natural gas) is a big export earner for Canada in this market. But New England is increasingly interested in energy efficiency and clean energy, and any company with technology that can reduce energy consumption, especially that of fossil fuel, should investigate this market.
- ▶ Agri-food, such as fish, seafood and vegetables, offer further opportunities. Healthy foods and family meals presented in time-saving packaging are a growth area, as is the ethnic food segment, especially Latino and Indian foods.

\* All dollar values are in Canadian dollars unless otherwise specified.

- ▶ IT firms that specialize in services for businesses and institutions, particularly if they can offer end-to-end applications, can find lucrative opportunities in the financial industry.
- ▶ Canadian firms that specialize in monitoring, navigation and communication technologies may find markets in the defence and security sector, given that the Boston area is home to some of the largest U.S. defence contractors.
- ▶ Manufactured goods, such as machine parts, metal products, wood products and plastics, offer many other possibilities. Quality building products for the residential sector, especially those that can speed up the pace of construction or reduce housing costs, are in demand.
- ▶ Some of the richest opportunities lie in the biotechnology and medical technology sectors. The combined research budgets of the five largest hospitals in Boston total more than \$1 billion, and New England pharmaceutical firms are keen to talk to companies that are working on new products or drugs. If you have a product that has reached a promising stage, these companies may be willing to consider putting it into their development pipeline.
- ▶ Canadian clinical research organizations are well positioned to conduct clinical trials through networks of Canadian hospitals and health care centres. This may allow them to establish profitable partnerships with American companies that want to do clinical research in Canada.
- ▶ Photonics and nanotechnology offer further potential and, given Boston's location on the Atlantic coast, there are possibilities in ocean technologies as well.
- ▶ While Boston isn't a major banking centre, it does have a robust venture-capital community that Canadian companies can tap into. Boston's venture capitalists are primarily interested in high technology and in companies with the ability to make a breakthrough in this market. This sector has the advantage of being insensitive to currency fluctuations.

### **Obtaining assistance from the Canadian Trade Commissioner Service**

If you need help researching your market, finding key contacts and local company data, obtaining information about visiting, or setting up face-to-face briefings, be sure to contact the Trade Commissioner Service team at Canada's Consulate General in Boston at the following address:

#### **Consulate General of Canada**

3 Copley Place, Suite 400  
Boston MA 02116  
USA

Tel.: 617-262-3760

Fax: 617-262-3415

Email: [boston.commerce@international.gc.ca](mailto:boston.commerce@international.gc.ca)

Web: [www.international.gc.ca/boston](http://www.international.gc.ca/boston)

## Selected events and organizations

### Events

- ▶ Boston Wine Expo: [www.wine-expos.com](http://www.wine-expos.com)
- ▶ Drug Discovery Technology World Congress: [www.drugdisc.com](http://www.drugdisc.com)
- ▶ International Boston Seafood Show: [www.bostonseafood.com](http://www.bostonseafood.com)
- ▶ MassMEDIC-MedTech Investors Conference: [www.massmedic.com](http://www.massmedic.com)
- ▶ New England Home Show: [www.newenglandhomeshows.com](http://www.newenglandhomeshows.com)
- ▶ New England Facilities Expo: [www.facilitiesexpo.com](http://www.facilitiesexpo.com)
- ▶ New England Food Service & Lodging Expo: [www.northeastfoodservice.com](http://www.northeastfoodservice.com)
- ▶ Vermont Business and Industry Expo: [www.vtexpo.com](http://www.vtexpo.com)

### Organizations

- ▶ Massachusetts Biotechnology Council: [www.massbio.org](http://www.massbio.org)
- ▶ Mass Technology Leadership Council: [www.masstlc.org](http://www.masstlc.org)
- ▶ New England Canada Business Council: [www.necbc.org](http://www.necbc.org)
- ▶ World Trade Center Boston: [www.seaportboston.com](http://www.seaportboston.com)
- ▶ World Trade Center Rhode Island: [www.chafeecenter.org](http://www.chafeecenter.org)

## The Tri-State Region

### Eastern New York State, Connecticut and New Jersey

#### The Tri-State market environment

The Tri-State region, comprising Eastern New York State, Connecticut and New Jersey, is an excellent market for a broad range of Canadian commodities, products and services. With a population nearly as big as Canada's, it's home to 16 per cent of all U.S. Fortune 500 companies and almost 25 per cent of all major U.S. corporations. In 2006, almost 12 per cent of Canada's total exports to the United States — \$42.2 billion worth of goods and services — went to this area. Because of this flood of trade, the two countries are investing heavily in improved infrastructure at the region's major land ports of entry.

Traditionally, the Tri-State region's largest volume of Canadian imports has been in commodities such as wood, paper, electricity, natural gas, petroleum, agri-food and metals. But many non-commodity sectors, from consumer goods to aerospace, also offer opportunities. New York City, all on its own, is a powerhouse in the media, publishing, advertising, cultural and financial sectors.

Steadily increasing competition from Asian products and the high value of the Canadian dollar are the two major challenges facing Canadian companies operating here. In response, Canadian firms should look for American partners to exploit complementary product lines, fill specialty niches and develop the high-end merchandise that will attract customers in this extremely affluent region.

### **Current and emerging opportunities**

From building projects to aircraft components, the Tri-State area has an appetite for just about everything. Some of the most promising sectors include the following.

- ▶ Despite the 2007 downturn in residential building, the construction sector as a whole remains strong. This is partly due to the huge development projects currently underway in lower Manhattan, which will be worth at least \$10 billion over the next few years. For Canadian exporters, this translates into steady demand for specialized wood products, heating and cooling systems, security systems and a host of other goods.
- ▶ The region has a growing appetite for green construction, so it's a market that should be of great interest to Canadian companies specializing in environmentally friendly building materials and environmental services.
- ▶ The United States' push for homeland security is another fertile field. Among current needs are communications and mobile data terminal equipment, radiological and biological air-testing equipment, and first-responder equipment.
- ▶ The Tri-State region has a strong aerospace sector centred in Connecticut, and aircraft and aircraft parts are the state's single largest import from Canada. This can provide excellent opportunities for partnerships between Canadian and American aerospace companies.
- ▶ Expanding IT requirements in the financial, media, publishing, and advertising industries means a growing market for Canadian providers of back-office services, data management and software products.
- ▶ Agri-food is another growth sector, since the region's ethnic diversity makes it an excellent market for speciality foods and for Canadian wines.
- ▶ New York City is a world centre for culture and the arts; if your firm is operating in Canada's cultural industries, you may be interested in knowing that Canada's New York consulate has a full-time trade commissioner dedicated to the sector.
- ▶ The life sciences sector is very important. Half the U.S. investment in pharmaceutical R&D, for instance, pours into New Jersey. New York State itself is home to 25 academic research institutions and to some of the United States' most important corporate laboratories, many of which have a strong focus on life sciences research. Canadian firms working in this and related fields may find rich opportunities with U.S. companies and institutions that need outside contractors for research, manufacturing and clinical trial management.



- ▶ Many types of Canadian high-technology firms can find avenues into this market through partnerships with American companies and research institutions. In March 2006, for example, a Memorandum of Understanding for nanotechnology was signed between the Ontario's University of Waterloo and the College of Nanoscale Science and Engineering of the State University of New York.

### Selected organizations

- ▶ Business Council of New York State: [www.bcnys.org](http://www.bcnys.org)
- ▶ Center for Biotechnology: [www.biotech.sunysb.edu](http://www.biotech.sunysb.edu)
- ▶ CNY Biotechnology Research Center: [www.upstate.edu/biocenter](http://www.upstate.edu/biocenter)
- ▶ Connecticut Business & Industry Association: [www.cbiam.com](http://www.cbiam.com)
- ▶ Environmental Business Association of New York State: [www.ebanys.org](http://www.ebanys.org)
- ▶ Greater New York Chamber of Commerce: [www.chamber.com](http://www.chamber.com)
- ▶ New Jersey Business & Industry Association: [www.njbia.org](http://www.njbia.org)
- ▶ New Jersey Chamber of Commerce: [www.njchamber.com](http://www.njchamber.com)
- ▶ New York Software Industry Association: [www.nysia.org](http://www.nysia.org)
- ▶ New York State Builders Association: [www.nysba.com](http://www.nysba.com)

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### Obtaining assistance from the Canadian Trade Commissioner Service

If you need help researching your market, finding key contacts and local company data, obtaining information about visiting, or setting up face-to-face briefings, be sure to contact the Trade Commissioner Service team at Canada's Consulate General in New York at the following address:

#### Consulate General of Canada

251 Avenue of the Americas  
New York N.Y. 10020-1175  
USA

Tel.: 212-596-1650

Fax: 212-596-1793

Email: [cngny-td@international.gc.ca](mailto:cngny-td@international.gc.ca)

Web: [www.newyork.gc.ca](http://www.newyork.gc.ca)

## The Mid-Atlantic States

### District of Columbia, Maryland, Virginia, Delaware and Eastern Pennsylvania

#### The Mid-Atlantic market environment

The Mid-Atlantic region of the United States includes Virginia, Maryland, Delaware, Eastern Pennsylvania and the District of Columbia, and has a combined population of about 25 million. During 2006, the region imported Canadian goods worth approximately \$14 billion; among the major import categories were petroleum and petroleum products, aircraft and vehicle parts, metals and metal products, rubber, plastics, newsprint and lumber.

The Mid-Atlantic region is a substantial market; the Greater Washington area alone has a Gross Regional Product of US\$313 billion, making it the fourth-largest metropolitan economy in the United States. Philadelphia is the east coast's second-largest city, and the eastern half of Pennsylvania has 21 Fortune 500 companies within its borders. Maryland may be small in size, but it ranks second after California in terms of federal R&D funding; many federal laboratories are located in Maryland, including the National Institutes of Health, the NASA Goddard Space Flight Center, and the National Oceanic and Atmospheric Administration.

The region is also the country's major defence-procurement market. If your firm operates in this sector, be sure to familiarize yourself with U.S. government contract requirements and bidding processes so you can take advantage of procurement opportunities. However, the steadily strengthening U.S. emphasis on security, resulting in barriers such as tighter import controls and licensing delays, can present challenges to defence-related exporters. It has also become more difficult for a Canadian company to obtain permission for its employees to work in these industries, even temporarily.

### Current and emerging opportunities

Easily accessible from many Canadian business centres, the Mid-Atlantic region can also be fertile ground for Canadian companies in many different industries.

- ▶ Medical technology, health care and biotechnology are among the region's best market prospects. Greater Washington alone contains the nation's third-largest biotech cluster, with more than 700 local firms. It's also the federal government's focal point for health research, with 27 institutions engaged in medical R&D. Maryland has such major biotechnology companies as Celera Genomics, as well as prestigious research centres like the University of Maryland's Biotechnology Institute. Philadelphia is very strong in pharmaceuticals, biotechnology, medical devices, medical R&D and health services.
- ▶ Information and communications technology (ICT) is another promising sector. The U.S. federal government is the largest single technology consumer in the world, and its ICT expenditures have been growing by more than 9 per cent annually. As a result, Greater Washington has acquired the country's second-largest concentration of ICT firms, and government procurement continues to drive the sector's expansion. Information security, photonics and e-learning technologies are especially important growth areas within this sector.

### Obtaining assistance from the Canadian Trade Commissioner Service

If you need help researching your market, finding key contacts and local company data, obtaining information about visiting, or setting up face-to-face briefings, be sure to contact Canada's consulate in Washington, D.C. at the following address:

**Embassy of Canada to  
the United States of America**  
501 Pennsylvania Ave. NW  
Washington, D.C. 20001-2111  
USA

Tel.: 202-682-1740  
Fax: 202-682-7795 / 7619  
Email: [wshdc.infocentre@international.gc.ca](mailto:wshdc.infocentre@international.gc.ca)  
Web: [www.washington.gc.ca](http://www.washington.gc.ca)

- ▶ Sprinkled throughout the region are myriads of companies and institutions working in defence, aerospace and security. Avionics, navigation and other specialized systems and subsystems are much in demand, as is technology for C4I (command, control, communications, computers and intelligence). Chemical, biological and nuclear threat protection are other growth subsectors, as are products and services for border security and security infrastructure.
- ▶ Greater Philadelphia, and the Greater Richmond–Petersburg area of Virginia, offer possibilities for Canadian agri-food industries; Canadian wines, for example, are now being sold in Greater Philadelphia’s retail liquor outlets.

### **Selected organizations**

- ▶ Eastern Technology Council: [www.techcouncil.org](http://www.techcouncil.org)
- ▶ Fairfax County Chamber of Commerce: [www.fccc.org](http://www.fccc.org)
- ▶ Greater Washington Initiative: [www.greaterwashington.org](http://www.greaterwashington.org)
- ▶ Greater Philadelphia Chamber of Commerce: [www.greaterphilachamber.com](http://www.greaterphilachamber.com)
- ▶ High Technology Council of Maryland: [techcouncilmd.com](http://techcouncilmd.com)
- ▶ Northern Virginia Technology Council: [www.nvtc.org](http://www.nvtc.org)
- ▶ Virginia Economic Development Partnership: [www.yesvirginia.org](http://www.yesvirginia.org)
- ▶ World Trade Center Institute of Baltimore: [www.wtci.org](http://www.wtci.org)

## **Florida, Gateway to Latin America**

### **Florida, the Caribbean and Latin America**

#### **Florida’s market environment**

Driven by strong population growth, a real estate boom and the expansion of export markets throughout the Americas, Florida’s economy has become the fourth largest in the United States. The bilateral trade between Canada and Florida added up to \$6 billion in 2006, and despite 2007’s sharp downturn in the residential real estate sector, Florida remains a very important export destination for Canadian businesses. Conversely, Canada continues to be Florida’s single most important economic partner.

From an exporter’s point of view, the key characteristic of the Florida market is that it’s much bigger than it seems. It’s actually a gateway to the markets of Central America, the Caribbean, Brazil, Uruguay, Argentina, Colombia and Venezuela, and is so important in this regard that several Latin American countries maintain Chambers of Commerce in the state. Miami, in particular, functions as the purchasing capital for much of Latin America, and the Miami area’s enormous logistics capacity in both sea and air freight has led non-U.S. buyers to establish hundreds of trading companies there.

The main purpose of these companies is to source high-volume consumer and business products for shipment to Latin America and the Caribbean. This means that a Canadian firm doing business in Florida, provided it can acquire purchasers through such companies, can be well positioned to enter the much larger market to the south. These trading companies tend to keep a low profile, however, and it takes time and effort to locate the best sales prospects and form relationships with them; fluency in Spanish is a must in this regard. It must also be remembered that very careful due diligence is vital when dealing with buyers in this kind of business environment.

A business presence in Florida, combined with a good relationship with a local distributor, is highly recommended for exporters to the region; this is true no matter whether you're selling just within Florida or into Latin America as well. If your firm is small and you prefer not to set up a sales office, you should at least create a virtual presence by acquiring a Florida address and telephone number. A mid-sized company can consider opening a small office with a dedicated salesperson who knows the business environment and can sell to both Floridian and Latin American buyers. Larger companies can establish offices with a modest number of staff to oversee distributors or sales teams operating across the region.

### Current and emerging opportunities

Because Florida represents numerous markets outside the U.S., there's a demand for Canadian goods and services in many sectors. The following are among the most promising.

- ▶ Florida has a huge high-technology and ICT sector. More than 6,000 firms operate in the service areas of the University of Central Florida and the University of South Florida, which are leading participants in the high-tech corridor that runs from Tampa Bay to the Space Coast. There are particular opportunities for small- to medium-sized Canadian technology exporters who can market products to a myriad of value-added resellers, a strategy that can often eliminate the need for local distributors.
- ▶ Good opportunities exist in the life sciences sector. The Scripps Research Institute recently established a Florida campus, where researchers will concentrate on fields such as bioinformatics, cell-based screening, protein production and crystallography, proteomics and RNA dynamics. The Burnham Institute for Medical Research, the Torrey Pines Institute for Molecular Studies and SRI International are located here as well.

### Obtaining assistance from the Canadian Trade Commissioner Service

If you need help researching your market, finding key contacts and local company data, obtaining information about visiting, or setting up face-to-face briefings, be sure to contact the Trade Commissioner Service team at Canada's Consulate General in Florida at the following address:

#### Consulate General of Canada

200 South Biscayne Boulevard, Suite 1600  
Miami FL 33131  
USA

Tel.: 305-579-1600

Fax: 305-579-1631

Email: [infocentre.miami@international.gc.ca](mailto:infocentre.miami@international.gc.ca)

Web: [www.miami.gc.ca](http://www.miami.gc.ca)

- ▶ Almost every major U.S. aerospace company and defence contractor operates in Florida, most of them located near military installations and the Kennedy Space Center. Together, they manufacture aircraft, aircraft parts, engines, missiles, space vehicles, avionics, and navigation and communication equipment. Several of these contractors are especially interested in simulations and simulation technology.
- ▶ Agri-food is a growth sector because of the state's expanding population. Beef and seafood are in demand, as are ethnic foods, gourmet foods and ready-made meals. Wine and energy drinks are good sellers. The cruise industry offers attractive prospects, since its ships require a great deal of food and most of these purchases are made in south Florida.
- ▶ The cruise industry is about more than food, of course. Florida is the biggest tourism destination in the world, and is a departure point for myriads of cruises. Capacious and varied supply chains support the ships and their associated shore installations, and the tight turnarounds characteristic of the industry mean that there's a market for companies that can guarantee dependable, on-time delivery of all types of consumables.
- ▶ The environmental, engineering and building sectors are showing strong interest in green construction and alternate fuels; in a related area, there's significant potential for collaboration on biofuels development.

## **Selected events and organizations**

### **Events**

- ▶ Air Cargo Americas International Exhibition: [www.aircargoamericas.com](http://www.aircargoamericas.com)
- ▶ Americas Food and Beverage Trade Show: [www.americasfoodandbeverage.com](http://www.americasfoodandbeverage.com)
- ▶ International Builders Show: [www.buildersshow.com](http://www.buildersshow.com)
- ▶ Interservice/Industry Training, Simulation and Education Conference: [www.iitsec.org](http://www.iitsec.org)
- ▶ Sea Cargo Americas International Exhibition: [www.seacargoamericas.com](http://www.seacargoamericas.com)
- ▶ Wireless Enterprise Symposium: [www.wirelessenterprisesymposium.com](http://www.wirelessenterprisesymposium.com)

### **Organizations**

- ▶ Beacon Council of Miami-Dade County: [www.beaconcouncil.com](http://www.beaconcouncil.com)
- ▶ Broward Alliance: [www.browardalliance.org](http://www.browardalliance.org)
- ▶ Enterprise Florida: [www.eflorida.com](http://www.eflorida.com)
- ▶ West Palm Beach Business Development Board: [www.bdb.org](http://www.bdb.org)

# 2

- ▶ **The Southeast**
- ▶ **The South Central States**
- ▶ **The Southwest**

## THE SOUTH



## The Southeast

### Alabama, Georgia, Mississippi, Tennessee, and North and South Carolina

#### The Southeast's market environment

In 2006, the six states of this region bought \$27 billion worth of goods from Canada. The major import categories included motor vehicles and vehicle parts, forest products, metals and metal products, chemicals, machinery, and medicines and medical supplies. The largest single import was energy, most of which (\$3 billion worth) was natural gas shipped to Tennessee.

During 2007, the region experienced market stresses originating partly in the subprime lending crisis, which has caused the pace of new home construction to continue to decline. The drop in construction has caused some layoffs in the residential housing sector, but the labour market has nevertheless remained tight, and skilled workers can be hard to find. Retail sales growth has moderated, and the agricultural sector has been in difficulty owing to severe drought in parts of Alabama, Georgia, and Tennessee.

Even so, the Southeast's overall economy has proven quite resilient, with demand persisting in transportation, energy, forest products, machinery, household and personal care goods, aerospace components, agricultural products and consumer tourism. Revenues from tourism are rising, and companies related to the energy, medical, and defence industries have been growing. Several high-technology sectors are quite active as well.

If your company is new to the region, you should be aware that southerners conduct business in their own characteristic way: here, well-developed personal relationships between buyer and seller are just as important as the price and quality of the goods and services being bought or sold. This represents a fine opportunity for Canadian firms that intend to operate in this market for a long time. Conversely, firms that prefer brief commitments and opportunistic sales should probably look elsewhere.

Because of this relationship-oriented way of doing business, frequent visits by representatives of the Canadian company are a must; if you use local partners, you'll have to provide top-quality training in the sales and servicing of your product. Products and services with niche appeal and innovative characteristics tend to do better in the Southeast than those that can be commoditized; the latter leads to price-point competition, which usually puts a Canadian company at a disadvantage.



The supply of venture capital is limited unless your company is willing to partner with local firms, or to license technologies to institutions such as the Centers for Disease Control & Prevention (CDC), the Georgia Institute of Technology (GA Tech), and Oakridge National Laboratories. Local sources of venture capital are typically interested in Canadian firms with annual revenues of at least US\$1 million; because of the barriers created by long-distance management, they're seldom attracted to Canadian start-ups.

### Current and emerging opportunities

For the most part, the best opportunities for Canadian exporters currently lie in the following sectors. These opportunities can include not only the straightforward export of goods or services, but also partnerships and investment.

- ▶ Tourism is a growth sector, since foreign travel has boosted leisure and hospitality activity along the Gulf coasts of Mississippi and Alabama, and (of course) in Florida. While Florida is not part of this region, the tourism boom there does support its counterpart in Tennessee, Georgia and the Carolinas, since travellers driving south spend substantial amounts of money in these four states.
- ▶ Housing starts are down throughout the region, which has reduced the demand for residential building products and softwood lumber. Commercial construction, however, has remained more or less flat, so Canadian firms in this sector should concentrate their efforts in this sector. That said, the residential market will turn around sooner or later, so you might want to lay some groundwork for the future even if it doesn't result in immediate sales.
- ▶ The market for alternative-energy technologies is quite robust. Companies with expertise in cellulosic ethanol production, solar power, and the storage and transport of alternative fuels should explore the possibilities here.

#### Obtaining assistance from the Canadian Trade Commissioner Service

If you need help researching your market, finding key contacts and local company data, obtaining information about visiting, or setting up face-to-face briefings, be sure to contact the Trade Commissioner Service team at Canada's Consulate General in Atlanta at the following address:

##### Consulate General of Canada

1175 Peachtree Street N.E., 100 Colony Square, Suite 1700  
Atlanta GA 30361-6205

USA

Tel.: 404-532-2000

Fax: 404-532-2050

Email: [atnta-td@international.gc.ca](mailto:atnta-td@international.gc.ca)

Web: [www.atlanta.gc.ca](http://www.atlanta.gc.ca)



- ▶ The environmental industry is another leading-edge sector seeking new products, services and technologies. Opportunities include the design and construction of green buildings, engineering and product development for water conservation and treatment, and technologies and services for solid waste management and disposal.
- ▶ The maintenance, repair and overhaul of military aircraft is another segment that offers significant potential business.
- ▶ Medical, ophthalmic and orthopaedic supplies are in demand. The medical sector can also be attractive to companies specializing in advanced R&D, such as the development and manufacturing of pandemic-related vaccines. There are already Canada-U.S. links in this field, such as the Viral Bioinformatics Resource Center (VBRC), which is a collaboration between the University of Alabama at Birmingham and the University of Victoria in British Columbia.
- ▶ The vehicle components market is large and productive; a new KIA assembly plant in Georgia and a planned Toyota plant in Mississippi, for example, offer possibilities for Canadian auto parts suppliers.
- ▶ The high-technology industry is quite active in sectors such as ICT, nanotechnology, remote sensing technologies and LED lighting technologies.
- ▶ Organic chemicals, metal products, and plastics and synthetic rubber provide further areas of opportunity.

### **Selected organizations**

- ▶ Business Council of Alabama: [www.bcatoday.org](http://www.bcatoday.org)
- ▶ Georgia Chamber of Commerce: [www.gachamber.com](http://www.gachamber.com)
- ▶ Mississippi Economic Council: [www.msmec.com](http://www.msmec.com)
- ▶ North Carolina Chamber: [www.nccbi.org](http://www.nccbi.org)
- ▶ South Carolina Chamber of Commerce: [www.scchamber.net](http://www.scchamber.net)
- ▶ Tennessee Chamber of Commerce and Industry: [www.tnchamber.org](http://www.tnchamber.org)
- ▶ Tennessee Chamber of Commerce: [www.tennessee.org](http://www.tennessee.org)

## The South Central States

### Arkansas, Kansas, Louisiana, Oklahoma and Texas

#### The South Central market environment

For the past several years, Arkansas, Kansas, Louisiana, Oklahoma and Texas have been enjoying an overall economic growth rate that's about 1 per cent above the U.S. national average. The boom in these South Central states has been good for Canada's foreign trade, and Canadian companies exported \$21.5 billion worth of products and commodities to the region in 2006. Sales of petroleum, chemicals, vehicle parts, aircraft components, lumber, plastics and metal products accounted for the major portion of the total.

The lion's share of these exports — \$14.5 billion worth — went to Texas, which is by far the largest market in the region. It has two-thirds of the regional population of 38 million, and accounts for more than two-thirds of the regional economic output. The Dallas-Fort Worth Metroplex alone has 6.2 million people, making it the fourth-largest metropolitan area in the United States, and Texas is home to 56 of the region's 69 Fortune 500 headquarters. Domestic and international investment are flowing in at a high level, with Texas a particular winner in this respect.

The region offers not only plenty of sunshine but also a business-friendly environment. It has low labour costs, low taxes and low levels of unionization. Housing is relatively inexpensive, which helps it attract skill and talent from regions where shelter costs are higher. At the municipal and state levels there's a hands-off attitude toward policymaking, and existing policies tend to be pro business. People take the views of the business community seriously, and see the local chambers of commerce as an important part of the community.

#### Current and emerging opportunities

The South Central states are economically very diverse. If your company operates in any of the following sectors, a close look at the region's possibilities may be very much in your interest.

- ▶ The ICT industry includes major companies like Texas Instruments and Canada's Nortel. It's a promising growth area, especially in interactive media and game technologies, and in health information technologies (HIT). The latter is a relatively new subsector in which ICT intersects with medical practice to process and manage information such as research data, patient data, diagnostics and medical imaging.
- ▶ Texas is very strong in the life sciences, including cancer and brain research, so there's scope for collaboration between Canadian and American firms in these fields. The U.S. military is concentrating many of its medical services and capabilities around San Antonio, which has encouraged numerous life sciences companies and institutions to establish themselves in the area.

- ▶ Aerospace is an extremely vibrant sector. Kansas has so many major aircraft manufacturers that Wichita is known as the air capital of the world, and Texas has major companies such as Bell Helicopter and Lockheed Martin. The requirements for components, systems and services are very substantial, and Canadian companies are already providing them for the F-35 Joint Strike Fighter project, a Bell reconnaissance helicopter and a Cessna light jet.
- ▶ The demand for security systems and solutions is expanding rapidly. Biometrics, surveillance equipment and technologies for monitoring the movement of goods and freight are particular growth areas.
- ▶ Construction and building materials such as manufactured, panelized housing products are needed, especially because of the ongoing rehabilitation of New Orleans and southern Louisiana. Houston, too, has been rebuilding its housing stock in the poorer areas of the city and is looking for economical, efficient ways to create homes for its citizens.
- ▶ Agri-food is becoming an important growth sector because of the expanding population. One of the larger U.S. food chains, H-E-B Grocery Stores, is a major buyer of Canadian food products and operates across Texas.
- ▶ The petroleum sector isn't as crucial to Texas' economy as it used to be. Even so, the oil and gas industry still accounts for about 7 per cent of the region's economic output, and Houston is still the world's energy capital. The sector has been enjoying a boom because of the continuing high demand for oil, and companies are trying to bring in domestic sources that weren't economically viable a few years ago. This entails finding new ways to increase their oil productivity and upgrade their refineries, so they're very interested in Canadian technologies such as using CO2 injection to improve oil extraction, and gasifying coal at great depths to produce oil.
- ▶ The region's ocean industries offer lucrative opportunities in two major areas: first, the marine transport industry, which includes ports, barges and boats; and second, support to the offshore oil and gas industries. At least fourteen of the United States' most important ports lie in Texas and Louisiana, several of them located on the Mississippi near New Orleans and the others on the Gulf coast; Canadian companies are already providing security systems and management software for some of these facilities. In the offshore support sector, there's a steady demand for supplies and for communications, security and safety equipment.

- ▶ On the environmental side, there's now a grassroots push in many municipalities for land, air and water cleanup, which points toward growth in the environmental remediation sector. In the associated field of alternative energy, there's a good deal of interest in producing cellulosic ethanol; this process uses wood chips and other plant wastes, rather than corn or grain, as a feedstock.

## Selected events and organizations

### Events

- ▶ Offshore Technology Conference:  
[www.otcnet.org](http://www.otcnet.org)
- ▶ Oklahoma Aerospace Summit & Expo:  
[www.okaerospacesummit.org](http://www.okaerospacesummit.org)
- ▶ SXSW Interactive:  
<http://2008.sxsw.com/interactive>
- ▶ Texas Wireless Summit:  
[www.twsummit.com](http://www.twsummit.com)

### Organizations

- ▶ Free Trade Alliance San Antonio:  
[www.freetradealliance.org](http://www.freetradealliance.org)
- ▶ Greater Dallas Chamber of Commerce:  
[www.dallaschamber.org](http://www.dallaschamber.org)
- ▶ Greater Dallas Hispanic Chamber of Commerce: [www.gdhcc.com](http://www.gdhcc.com)
- ▶ Kansas World Trade Center:  
[www.kansaswtc.org](http://www.kansaswtc.org)
- ▶ Oklahoma Governor's International Team:  
[www.okgit.com](http://www.okgit.com)

### Obtaining assistance from the Canadian Trade Commissioner Service

If you need help researching your market, finding key contacts and local company data, obtaining information about visiting, or setting up face-to-face briefings, be sure to contact the Trade Commissioner Service team at Canada's Consulate General in Dallas at the following address:

#### Consulate General of Canada

750 North St. Paul St., Suite 1700  
Dallas TX 75201-3247  
USA

Tel.: 214-922-9806

Fax: 214-922-9815

Email: [dalas-td@international.gc.ca](mailto:dalas-td@international.gc.ca)

Web: [www.dallas.gc.ca](http://www.dallas.gc.ca)

## The Southwest

### Arizona and New Mexico

#### The Southwest's market environment

Most Canadian exporters know little about New Mexico and Arizona. Conversely, the business communities in these two U.S. states are barely aware of Canada as a trading partner; for the most part, their interest is firmly fixed on Mexico.

Even so, there's a significant amount of bilateral trade between Canada and the Southwest. Arizona imported \$1.9 billion worth of Canadian goods in 2006; its largest single import was softwood lumber and wood products, followed by aircraft and aircraft parts. In 2006, New Mexico bought Canadian goods valued at \$149 million, with softwood lumber and wood products again leading the pack. Canada is also a surprisingly strong investor in Arizona; a Montréal firm owns a large chain of mini-markets across the state, and a Canadian company has a newsprint mill there. Numerous Canadian engineering and construction firms maintain offices in the region, and Ontario and Alberta water-resource companies are involved in several public-private partnerships related to hydraulic engineering, wastewater treatment and water supply.

One major attraction of this market, for small- to medium-sized Canadian businesses, is that their counterparts here operate on a similar scale. That makes the Southwest a good fit for many Canadian companies across a broad range of industries — a small IT firm that would struggle to be noticed in California, for example, can quickly become a significant player in Arizona's rapidly growing IT sector. Moreover, because the market hasn't drawn much attention from Canada, parts of it are relatively untapped. This presents good opportunities not just for product sales, but also for investment, partnerships and collaborations across many industries.

Last but not least, the region's geographical location makes it a good base for shipping goods into Texas and California. And it's an ideal gateway to the Mexican market, since Canadian firms that establish manufacturing facilities here can draw on local experience to acquire business contacts in northern Mexico.

## Current and emerging opportunities

For a market covering only two states, the Southwest presents a remarkably varied range of industries. The following are among the most promising sectors.

- ▶ Life sciences, biotechnology and medical devices are important, especially on the R&D and innovation side. One major cluster of companies and institutions, with a particular emphasis on basic research, individual health care, and cancer and diabetes research, is situated around Phoenix's hospitals and the Arizona State University campus. The other cluster is in Tucson near the University of Arizona, which has a particular focus on pharmaceuticals and pharmaceutical R&D. The biotech businesses operating here tend to be small- to medium-sized firms, and Canadian companies will be warmly welcomed by the Arizona Bioindustry Organization.
- ▶ Because Arizona is one of the fastest-growing states in the U.S., building products and materials are much in demand; reflecting this, Canada's single largest export to Arizona and New Mexico is softwood lumber. This appetite is persisting despite the overall U.S. downturn in residential construction; while the demand for houses in the \$300,000–\$600,000 range has flattened, sales of large luxury homes (in the million-dollar range and up) continue unabated. The builders of these residences are in the market for high-end components such as solid granite countertops and solid wood millwork, doors, stairways, balconies and railings. Niche products can be popular as well — one Canadian company is selling artificial rocks for fountains. On the services side, property management and engineering services offer further opportunities.
- ▶ The ICT sector is strong in Arizona, and some major Canadian firms, such as Ottawa's Mitel Networks, have become part of it. A good deal of hardware is produced here, including telephone equipment, computer chips and fibre optic equipment. Tucson is a world leader in optics and photonics, and Tucson and Ottawa have had a strong link for several years via the Canadian Photonics Consortium and the Ottawa Photonics Cluster.
- ▶ Aerospace and defence are important sectors. Boeing produces the full line of Apache helicopters in Arizona, and companies such as Motorola, Boeing, McDonnell Douglas and Honeywell operate plants that manufacture components and systems for everything from satellites to aircraft. And in terms of contracts with the U.S. Department of Defense, Arizona ranks third in the U.S., after California and Florida.
- ▶ Canadian suppliers of mining equipment and services may find buyers in Arizona and New Mexico. Conveniently, some of these customers could be Canadian; about 15 Canadian mining companies are operating or exploring in the region, primarily for copper, silver, molybdenum and uranium. In 2006, for example, Vancouver's Quadra Mining purchased the Carlota copper mine in Arizona, and is in the process of developing it.

- ▶ Arizona is working on the development of solar energy, and both Arizona and New Mexico are interested in wind power. While there's no oil in the region, New Mexico is a major producer of natural gas, so there's a need for equipment related to pipelines and gas refineries. Electricity generation and transport is likely to be an expanding sector, since new power plants and transmission lines, with their associated equipment and service requirements, are on the horizon.
- ▶ One set of opportunities is unique to the Southwest region: the possibility of expanded trade relationships between Canada's First Nations bands and the Native American pueblos of Arizona and New Mexico. Most of the pueblos are pre-qualified to do business with the U.S. government as minority-owned companies, so a First Nations-owned business that can link to a pueblo business will have relatively easy access to the U.S. government procurement system.

## Selected events and organizations

### Events

At the moment there are no regularly-occurring major trade shows in New Mexico or Arizona, but Phoenix is only five hours' drive from the big convention centres in Las Vegas.

### Organizations

The state Departments of Commerce and the local Chambers of Commerce have not been very active internationally, so Canadian companies seeking market information about the region should go first to the Canadian consulate in Phoenix; the Trade Commissioner Service team there can put you in touch with the appropriate sector and industry associations.

### Obtaining assistance from the Canadian Trade Commissioner Service

If you need help researching your market, finding key contacts and local company data, obtaining information about visiting, or setting up face-to-face briefings, be sure to contact the Trade Commissioner Service team at Canada's Consulate General in Phoenix at the following address:

#### Consulate General of Canada

2415 E. Camelback Road Suite 700  
Phoenix AZ 85016  
USA

Tel.: 602-508-3572

Email: [phoen-td@international.gc.ca](mailto:phoen-td@international.gc.ca)

Web: [www.phoenix.gc.ca](http://www.phoenix.gc.ca)

# 3

- ▶ **The Pacific Northwest**
- ▶ **The Mid-Pacific Region**
- ▶ **The Southern Pacific Region**

## THE WEST





## The Pacific Northwest

### Alaska, Washington, Oregon and Idaho

#### The Northwest's market environment

The economic centre of gravity of the Northwest lies in Oregon and Washington State. Washington's Greater Seattle area is the largest single market in the region, with about 3.5 million people, and is also the wealthiest. It's the location of some of the world's largest and most high-profile companies, such as Microsoft, Boeing, Amazon, Starbucks and Costco.

The Seattle area's wealth and economic diversity furnishes plenty of opportunity for Canadian companies, especially in aerospace, ICT, life sciences, clean technologies and alternative energy. Oregon affords a similar range of prospects and has its own concentration of major corporations. Idaho is a smaller and mostly agricultural market, whose major Canadian imports are softwood lumber, fertilizers, petroleum products and livestock feed. Alaska has attracted a considerable amount of Canadian investment in mining, oil and gas, and provides Canadian equipment supply companies with an ancillary market related to those sectors.

There's plenty of room here for partnerships between many types of Canadian and American firms, not to mention Canadian direct investment — Puget Sound Energy, for example, which is the Sound region's largest private-sector utility, was recently acquired by a consortium of three Canadian pension funds and an Australian bank. And for Canadian firms seeking capital, this can be a very good place to look, since the region has one of the United States' richest concentrations of venture-capital investors. This includes the Alliance of Angels, a private economic development group that connects locally-operating technology companies to sources of capital.

#### Current and emerging opportunities

The economy of the Northwest, especially in Washington and Oregon, is very diverse. If your company operates in any of the following sectors, you may be pleased at the number of opportunities awaiting you in the region.

- ▶ There's a substantial aerospace cluster here, with Boeing as the single biggest player. Numerous suppliers in the area provide components and systems for the company's airliner programs, including the 767, the 777 and the 787, and these smaller aerospace companies can be a receptive market for Canadian parts and equipment. As well, Canada's Bombardier sells airframes and completed aircraft to regional airlines, and the Canada's CAE Corporation (which manufactures commercial flight simulators) is active here.

There's also a defence aspect to the regional aerospace industry, and several smaller companies in the Seattle area provide parts and services to larger defence contractors. This supply chain could accommodate Canadian suppliers as well, provided the Canadian company can satisfy the rigorous U.S. security standards for this sector.

- ▶ Washington and Oregon are major centres of ICT research and development, and connections already exist between companies in the region and Canadian firms in Vancouver, Montréal and Waterloo. Systems and software for social networking, business networking, security, and multimedia and wireless applications are busy subsectors, and the gaming side of the industry is especially active.
- ▶ There's a lot of R&D taking place in the life sciences, and the Puget Sound area is one of the nine U.S. regions where there's a critical mass of companies and research centers working in this sector. Together there are about 160 such companies employing over 12,000 people; in Seattle alone there are 15 research organizations and research hospitals such as the University of Washington, which receives about \$1 billion in externally funded, peer-reviewed research grants every year.
- ▶ Numerous opportunities exist for Canadian clean-technology and alternative-energy companies. Boeing, for example, is looking for ways to shrink its carbon footprint, and also to reduce its production costs by cutting energy consumption. For energy companies, the search is on for technologies, processes and equipment that will lead to new biofuels and other alternative fuel sources. Cellulosic ethanol technologies, which use plant waste rather than grain or corn to produce ethanol, are attracting particular interest.
- ▶ The food sector is a promising one, with a good range of expanding niche markets for prepared, speciality and value-added foods.

### Selected events and organizations

#### Events

- ▶ Casual Games Association (CGA)  
Casual Connect Seattle:  
<http://seattle.casualconnect.org>

#### Organizations

- ▶ Aerospace Futures Alliance  
of Washington: [www.afa-wa.com](http://www.afa-wa.com)
- ▶ Alaska State Chamber of Commerce:  
[www.alaskachamber.com](http://www.alaskachamber.com)
- ▶ Alliance of Angels:  
[www.allianceofangels.com](http://www.allianceofangels.com)
- ▶ Boise Metro Chamber of Commerce:  
[www.boisechamber.org](http://www.boisechamber.org)
- ▶ Greater Seattle Chamber of Commerce:  
[www.seattle.gov](http://www.seattle.gov)
- ▶ Oregon Chamber of Commerce: [www.oregonwi.com](http://www.oregonwi.com)
- ▶ Pacific Northwest Aerospace Association: [www.pnaa.net](http://www.pnaa.net)

#### Obtaining assistance from the Canadian Trade Commissioner Service

If you need help researching your market, finding key contacts and local company data, obtaining information about visiting, or setting up face-to-face briefings, be sure to contact the Trade Commissioner Service team at Canada's Consulate General in Seattle at the following address:

#### Consulate General of Canada

1501 4th Ave, Suite 600  
Seattle WA 98101-4328  
USA

Tel.: 206-443-1777

Fax: 206-443-9735

Email: [seatl-td@international.gc.ca](mailto:seatl-td@international.gc.ca)

Web: [www.seattle.gc.ca](http://www.seattle.gc.ca)

- ▶ Portland Business Alliance: [www.portlandalliance.com](http://www.portlandalliance.com)
- ▶ Trade Development Alliance of Greater Seattle: [www.seattle.gov/tda](http://www.seattle.gov/tda)
- ▶ Technology Alliance: [www.technology-alliance.com](http://www.technology-alliance.com)

## The Mid-Pacific Region

### Northern California, Nevada and Hawaii

3

#### The Mid-Pacific region's market environment

The economic centre of gravity of the Mid-Pacific region lies in Northern California, in the heavily populated counties around San Francisco Bay. Three things are special about the Bay Area; first, it's home to Silicon Valley and the source of much of the information and communications technology that has been reshaping the world since the early 90s. Second, the area has the world's largest and most important cluster of companies and institutions working in the life sciences. Third, the Bay Area has the highest concentration of venture capital on the planet.

Add to these qualities a very strong spirit of entrepreneurship, and the result is a region that's famous for innovation, new products, new companies and new lines of business. At least 30 Fortune 500 corporations have headquarters in the Bay area, and many of these are very important players indeed — HP, Google and Oracle are among them. Some of these companies, such as Google, didn't even exist a dozen years ago.

The business culture of Northern California is driven by the pursuit of success, and this imperative makes its businesspeople and researchers much less wary of failure than their counterparts in more conservative environments. It also makes the business environment a fiercely competitive one: Canadian companies that want to do business here will be confronted by competition from India, Israel, China, the UK, Australia and many other nations. Succeeding under these conditions demands a long-term commitment to the market, which usually includes three to five years of working closely with distributors and partners to co-market and co-promote the Canadian company's goods or services. It's not enough to have something unique, no matter how desirable it is; you'll also need enough time and money to sustain your efforts until you can establish yourself solidly in the marketplace.

As export destinations, Hawaii and Nevada are often lost in the immense shadow of Northern California, but they're economically part of the Mid-Pacific region as well. The Hawaiian market for Canadian goods is quite small; we shipped only \$100 million worth of goods there in 2006, about a third of it aerospace-related. Nevada, on the other hand, accounted for \$1 billion in Canadian exports in 2006, the bulk of the shipments being forest products, lumber and building materials.

### Current and emerging opportunities

Because of the presence of Silicon Valley and the large number of high-technology firms, institutions and R&D centres in the San Francisco region, the ICT industry is probably the best-known single sector in Northern California. But there's also potential for Canadian companies in several other broad sectors, including life sciences, agriculture and food, and clean technology, which encompasses environmental technologies related to water and to alternative and renewable energy.

- ▶ In agri-food, niche areas can be particularly rewarding. Among these are functional foods and nutraceuticals, value-added foods and specialty foods, including ethnic foods. While fish and seafood are in high demand, companies will have better success if their fish and seafood products meet the following consumer preferences: they're raised in a sustainable, eco-friendly manner; have value-added features; and the producers are environmentally sound in their processing and packaging.
- ▶ Major subsectors of the life sciences include biotechnology, pharmaceuticals and medical devices, and Northern California is home to the world's largest and most important biotech cluster. The entrepreneurial environment, the huge amounts of available capital and the presence of first-rank universities and research centres have nurtured the growth of hundreds of small- to medium-sized biotech firms.

Many of these businesses are under tremendous pressure to beat their competitors to market, and are therefore very interested in acquiring advanced products and technologies that will help accelerate the process. This presents a hospitable environment for Canadian life sciences companies that can provide suitable products or are willing to license out their technologies. Partnerships to co-develop therapies, drugs and medical devices are another attractive option. Canadian firms can also help U.S. companies by setting up clinical trials in Canada, or by carrying out contract research for U.S. businesses that need to outsource some of their R&D.

- ▶ Clean technology is a rapidly emerging sector, linking alternative energy and environmental services. Many major Silicon Valley corporations have become highly sensitive about their carbon footprints and the environmental impact of their activities; as a result, they are investing in technologies that reduce energy use, energy costs and greenhouse gas emissions. Federal and university research institutions, as well as commercial labs, are very active on the R&D side of this sector.
- ▶ California's environmental legislation is considered to be "technology forcing" in respect to technologies that remain to be developed or remain to be proven as commercially viable. Canadian companies with advanced technologies in biofuels, waste-to-energy conversion, biomass-derived energy, and solar or wind power should investigate this dynamic, trend-setting market.
- ▶ Concern about water resources is driving the development of new technology in this thirsty region. This includes technologies and services for water management, water conservation and treatment, storm water management, desalination and recycling.

- ▶ Perhaps nowhere else does the ICT sector provide such a variety of opportunities for partnerships, licensing, co-marketing and straightforward export sales. A tiny sample of the possibilities includes:
  - ▶ products to combat fraud, spam and other security risks on both wireless and wired networks;
  - ▶ technologies to enhance wireless Internet access by decreasing costs and reducing bandwidth constraints;
  - ▶ the extension of existing web-based applications to mobile technologies;
  - ▶ peer-to-peer applications for business environments, such as Services over IP (SOIP);
  - ▶ advanced sensory network technologies and related consumer applications;
  - ▶ digital media/entertainment content for mobile devices, including technologies for user-generated entertainment; and
  - ▶ the connection of social networking sites to mobile devices.
- ▶ Northern California isn't the only place to look for opportunities. In Nevada, the Las Vegas/Clarke County area is one of the fastest-growing urban areas in the United States. The rapid pace of hotel, resort and residential construction means that furniture, lumber, wood products, windows, doors, roofing materials and other building products are in heavy demand. Canadian mining companies have also been active in Nevada for many years, providing a small but useful market for Canadian mining equipment, supplies and technology.
- ▶ Hawaii currently relies on low-grade fossil fuels and coal to meet almost all its energy needs. However, initiatives are underway by the federal and state governments, the University of Hawaii and the private sector to generate 20 percent of the state's energy from non-fossil fuels by 2020. The state has already received federal funds for R&D into power sources such as biomass, wind, geothermal, hydrogen, ocean thermal, wave energy, waste-to-energy, solar and photovoltaics. There are opportunities in this market for Canadian energy and environmental technology companies with particular expertise in ocean technology (such as ocean and tidal energy), storm water management, biofuels, solar panels, high-grade aluminium heat transfer panels, and electric and hybrid vehicles.

### Obtaining assistance from the Canadian Trade Commissioner Service

If you need help researching your market, finding key contacts and local company data, obtaining information about visiting, or setting up face-to-face briefings, be sure to contact the Trade Commissioner Service team at Canada's Consulate General in San Francisco at the following address:

**Consulate General of Canada**  
580 California Street, 14th Floor  
San Francisco CA 94104  
USA

Tel.: 415-834-3180  
Fax: 415-834-3189  
Email: [sfran-td@international.gc.ca](mailto:sfran-td@international.gc.ca)  
Web: [www.sanfrancisco.gc.ca](http://www.sanfrancisco.gc.ca)

### Selected events

- ▶ CTIA Wireless I.T. & Entertainment Show: [www.wirelessit.com](http://www.wirelessit.com)
- ▶ Game Developer's Conference: [www.gdconf.com](http://www.gdconf.com)
- ▶ Oracle OpenWorld Conference: [www.oracle.com/openworld](http://www.oracle.com/openworld)
- ▶ SPIE Photonics West: [www.spie.org/photonics-west.xml](http://www.spie.org/photonics-west.xml)
- ▶ The Stem Cell Meeting: [www.burrillandco.com/bio/stemcell\\_meeting](http://www.burrillandco.com/bio/stemcell_meeting)
- ▶ SupplySide West (Las Vegas): [www.supplysideshow.com/west](http://www.supplysideshow.com/west)
- ▶ World Ag Expo: [www.worldagexpo.com](http://www.worldagexpo.com)
- ▶ NASFT Winter Fancy Food Show: [www.specialtyfood.com](http://www.specialtyfood.com)
- ▶ Natural Products Expo West: [www.expowest.com](http://www.expowest.com)

## The Southern Pacific Region

### Southern California

#### Southern California's market environment

Many of the previous section's observations on Northern California apply equally to the southern part of the state: it's success-driven, fiercely competitive, extremely innovative and rich in venture capital. Consisting of the counties lying south of (and including) St. Luis Obispo, Kern and San Bernardino, it's also a very big market — all by itself, the five-county region surrounding Los Angeles contains 17 million people and has a GDP of about US\$410 billion.

Canadians have been contributing to Southern California's wealth for many years — in fact, it's estimated that as many as 600,000 Canadians work in Southern California. Canada's economic ties to the region are also very strong, with many Canadians and Canadian businesses extremely active in the region's media and entertainment industries. In science and technology, numerous Canadian institutions are connected to California innovation centres such as UCLA, USC and Caltech.

Southern California possesses huge pools of investment and venture capital, and investors here have traditionally been aggressive in seeking out opportunities. Even so, the region can be a difficult market; like Northern California, it's very crowded, with myriads of companies from the United States and elsewhere competing for business. Oddly, given the number of Canadians living and working in the region, Canada itself tends to have a low business profile; when California's businesspeople think of international trade, they tend to think of Asia and Mexico, not Canada.

## Current and emerging opportunities

Several sectors currently hold promise for Canadian exporters.

- ▶ Between them, the Los Angeles region and the region around San Diego encompass one of the world's largest concentrations of aerospace and defence industries. There are many second- and third-tier suppliers to the prime contractors in this sector, and it's at this level that Canadian companies can most easily find customers for aircraft components and systems.
- ▶ The area is a hugely important ICT centre. Major institutions such as UCLA, Stanford and Caltech, together with hundreds of ICT companies engaged in R&D, are major generators of innovation. It's a favourable environment for partnerships, collaborations and licensing agreements between Canadian and U.S. firms.
- ▶ Biopharmaceuticals and medical devices present enormous opportunities; more than 1000 companies and institutions work in the life sciences, and there are at least 700 businesses in the medical devices subsector.
- ▶ Being home to Hollywood, the Los Angeles area is an important cultural and entertainment market. This provides many opportunities, not only in the arts themselves, but also in the software and media technologies that support the entertainment industry. Canada has a marked presence in this technology subsector, since the majority of the animation software and applications used in Hollywood feature films come from Canadian companies.
- ▶ Specialty foods and beverages are in increasing demand from an affluent and cosmopolitan population, including a vast and rapidly growing Hispanic community. There's strong interest in what the Canadian agri-food sector can offer, from beef to wine to seafood.
- ▶ Despite the 2007 downturn in the U.S. housing market, residential construction will continue, although at a slower pace. This means that the market for building materials and upscale home furnishings will remain reasonably viable.
- ▶ The alternative/renewable energy sector is a potentially huge market, in which Canadian expertise in hydrogen technology, fuel cells and other new energy sources can give exporters an edge.

### Obtaining assistance from the Canadian Trade Commissioner Service

If you need help researching your market, finding key contacts and local company data, obtaining information about visiting, or setting up face-to-face briefings, be sure to contact the Trade Commissioner Service team at Canada's Consulate General in Los Angeles at the following address:

**Consulate General of Canada**  
550 South Hope Street, 9th Floor  
Los Angeles CA 90071  
USA

Tel.: 213-346-2719  
Fax: 213- 346-2767  
Email: [cal.info@international.gc.ca](mailto:cal.info@international.gc.ca)  
Web: [www.losangeles.gc.ca](http://www.losangeles.gc.ca)

For assistance specific to the market in San Diego and Imperial Counties, contact the trade team at Canada's Consulate in San Diego at the following address:

**Consulate of Canada**  
420 W. Broadway, 4th Floor  
San Diego CA 92101  
USA

Tel.: 619-615-4286  
Fax: 619-615-4287  
Email: [sndgo-td@international.gc.ca](mailto:sndgo-td@international.gc.ca)  
Web: [www.sandiego.gc.ca](http://www.sandiego.gc.ca)



- ▶ The widespread urbanization of Southern California has created many challenges for water treatment, hazardous waste management and air quality; Canadian environmental products, engineering services and remediation technology may find customers in these subsectors.
- ▶ Transit is another opportunity, including major components such as rail cars and the infrastructure systems that support and control urban transportation networks.
- ▶ There are substantial possibilities for collaboration in R&D and investment; one current example is the Canada-California Strategic Innovation Partnership Initiative, which is helping companies and institutions develop better ways to transfer technology to the marketplace.

### Selected events and organizations

#### Events

- ▶ American Institute of Aeronautics and Astronautics (AIAA)  
Conferences and Exhibits: [www.aiaa.org](http://www.aiaa.org)
- ▶ Armed Forces Communications Electronics Association  
West Conferences and Exhibits: [www.afcea.org](http://www.afcea.org)
- ▶ Milken Institute Global Conference: [www.milkeninstitute.org](http://www.milkeninstitute.org)

#### Organizations

- ▶ Aerospace Industries Association: [www.aia-aerospace.org](http://www.aia-aerospace.org)
- ▶ Armed Forces Communications Electronics Association: [www.afcea.org](http://www.afcea.org)
- ▶ California Institute for Telecommunications and Information Technology: [www.calit2.net](http://www.calit2.net)
- ▶ Commnexus: [www.commnexus.org](http://www.commnexus.org)
- ▶ CONNECT: <http://www.connect.org>
- ▶ Greater San Diego Chamber of Commerce: [www.sdchamber.org](http://www.sdchamber.org)
- ▶ Los Angeles Chamber of Commerce: [www.lachamber.org](http://www.lachamber.org)
- ▶ Los Angeles Economic Development Council: [www.laedc.org](http://www.laedc.org)
- ▶ Los Angeles Region Technology Association (LARTA): [www.larta.org](http://www.larta.org)
- ▶ National Defence Industrial Association: [www.ndia.org](http://www.ndia.org)
- ▶ Orange Country Technology Alliance Network (OCTANe): [www.octaneoc.org](http://www.octaneoc.org)
- ▶ San Diego Regional Economic Development Corporation: [www.sandiegobusiness.org](http://www.sandiegobusiness.org)
- ▶ San Diego Software Industry Council: [www.sdsic.org](http://www.sdsic.org)
- ▶ San Diego Venture Group: [www.sdvgroup.org](http://www.sdvgroup.org)
- ▶ UCSD Center for Wireless Communications: <http://www-cwc.ucsd.edu>



# 4

- ▶ **The Rocky Mountain Region**
- ▶ **The Upper Midwest**
- ▶ **The Midwest**
- ▶ **The Great Lakes**
- ▶ **The Northeast**

## THE NORTH



## The Rocky Mountain Region

### Montana, Wyoming, Colorado and Utah

#### The Rocky Mountain market environment

Bounded on one flank by the Rockies and on the other by the plains of the American Midwest, the Rocky Mountain states of Montana, Wyoming, Colorado and Utah imported \$13.1 billion worth of Canadian products in 2006. These goods included mining machinery, fertilizers, live animals, newsprint, softwood lumber, aircraft and aircraft parts, trucks and motor vehicle components, and rubber and plastics. The single biggest Canadian export to the region, overshadowing the rest at \$7.4 billion, was crude petroleum.

The Rocky Mountain region's business culture is shaped by the character of its people, who maintain the western traditions of independence, self-reliance and entrepreneurship, and who are emphatically aware of their identity as westerners. They are less aware of Canada, however — the region's businesses and governments aren't well informed of the capabilities of Canadian companies, even though Canada is the biggest market for three of the region's four states.

Nevertheless, there's a great deal of potential here, for small companies as well as large ones. A common strategy used by Canadian businesses that have successfully entered this market is to begin by connecting to U.S. firms at trade shows and showcases, either in Canada or in the United States; these first contacts are then built into long-term business relationships with American dealers and distributors. Sometimes, depending on its product or service, a Canadian company can find it useful to open its own U.S. sales office, not necessarily to "go it alone," but rather to support its business south of the border and work more effectively with its U.S. partners.

#### Current and emerging opportunities

The economy of the Rocky Mountain region includes a wide range of manufacturing and service industries that can provide important opportunities for Canadian exporters.

- ▶ The huge appetite for Canadian oil and gas reflects the fact that the energy sector has become the region's new boom industry. Colorado, whose population of 6 million makes it the largest of the four states, is a major energy hub.
- ▶ Wyoming has only half a million people, but it provides 37 per cent of the coal consumed in the United States. Wyoming, Utah and Montana also show promise for oil and gas extraction. Montana has the country's biggest undeveloped coal deposits.
- ▶ The energy industry isn't completely focussed on fossil fuels, however. Numerous companies and institutions are very active in the renewable energy sector, including biofuels, wind and solar.

- ▶ The presence of heavy industries related to fossil fuels, and the strong interest in renewables, have helped make the public and private sectors aware of environmental issues and of the need for technologies and services that can help preserve the environment.
- ▶ Utah's economy is very diverse; it manufactures furniture and sporting goods, has strong steel and mining industries, and provides banking and financial services. Colorado is also an important hub for the regional mining industry.
- ▶ Utah and Colorado together present the best business opportunities in the life sciences, but Wyoming and Montana have centres that are operating in this sector and will likely become more prominent as time passes. Canadian medical institutions and companies should look into collaborating with U.S. counterparts in areas such as clinical trials, pharmaceuticals, medical devices, human gene targeting, medical imaging and personalized medicine.
- ▶ Several important medical delegations from the region have visited Canada during the past two years. Representatives of venture-capital companies and medical research institutions have attended Canadian conferences and showcases, and have toured Canadian institutions such as the University of Toronto's Medical and Related Sciences (MARS) complex. Attending such events can give your company valuable exposure to potential partners and investors.
- ▶ Aerospace and defence offer rich prospects. Colorado is home to the Air Force Academy and Peterson Air Force Base, and to the headquarters of NORAD, Northern Command and Space Command. Their requirements attract not only prime contractors such as Boeing and Lockheed, but also sub-contractors who may need Canadian aerospace technologies and services.
- ▶ Colorado is very strong in information and communications technology (ICT), since the state is a major player in telecommunications, broadcasting and related technologies. Utah is emphasizing IT as well, and the sector in both states has come back strongly since the steep downturn in 2001. As a result, recent Canadian ICT delegations to Colorado and Utah have met with considerable interest from their American counterparts.

#### **Obtaining assistance from the Canadian Trade Commissioner Service**

If you need help researching your market, finding key contacts and local company data, obtaining information about visiting, or setting up face-to-face briefings, be sure to contact the Trade Commissioner Service team at Canada's Consulate General in Denver at the following address:

#### **Consulate General of Canada**

1625 Broadway, Suite 2600  
Denver CO 80202  
USA

Tel.: 303-626-0640

Fax: 303-572-1159

Email: [denvr-td@international.gc.ca](mailto:denvr-td@international.gc.ca)

Web: [www.denver.gc.ca](http://www.denver.gc.ca)

### Selected organizations

- ▶ Advance Colorado Center: [www.advancecoloradocenter.com](http://www.advancecoloradocenter.com)
- ▶ Colorado BioScience Association: [www.cobioscience.com](http://www.cobioscience.com)
- ▶ Colorado Oil and Gas Association: [www.coga.org](http://www.coga.org)
- ▶ Colorado Software and Internet Association: [www.csiaonline.com](http://www.csiaonline.com)
- ▶ Independent Petroleum Association of Mountain States: [www.ipams.org](http://www.ipams.org)
- ▶ Montana World Trade Centre: [www.mwtc.org](http://www.mwtc.org)
- ▶ Utah Technology Council: [www.uita.org](http://www.uita.org)
- ▶ World Trade Center Denver: [www.wtcdn.com](http://www.wtcdn.com)
- ▶ Wyoming Business Alliance: [www.wba.vcn.com](http://www.wba.vcn.com)

## The Upper Midwest

### Minnesota, Iowa, Nebraska, and North and South Dakota

#### The Upper Midwest's market environment

Comprising Minnesota, Iowa, Nebraska, North Dakota and South Dakota, the Upper Midwest bought a total of \$19.1 billion in Canadian goods and services in 2006. Minnesota was Canada's largest customer by a considerable margin, accounting for \$11.8 billion of this total, followed by Iowa with \$3.97 billion. By dollar volume, the Upper Midwest's major imports from Canada have traditionally been gas and oil, electricity, paper and paper products, aerospace products, motor vehicle components and metals.

From an economic standpoint, the Upper Midwest and Canada's Prairie provinces are closely integrated. Ironically, this can work against Canadian exporters because U.S. companies don't necessarily see Canada as a different country, and so don't always turn first to Canadian companies when they're looking for foreign partners. Conversely, this integration does make the Upper Midwest a very accessible market for Canadian companies. The region has a long history of doing business with Canada, and is an excellent place for first-time exporters, especially those based in the Prairie provinces.

Many of the opportunities in these sectors can take the form of Canadian-American partnerships. The region has many large companies that focus heavily on R&D to supply their product chain; because they're always seeking to create new products, they're very interested in what Canada can do for them. The venture-capital market here is less active than it is elsewhere in the U.S., but some large multinational firms (mainly in the agricultural sector) do maintain venture funds for future product development.

According to Canadian companies familiar with the region, building face-to-face relationships with potential customers, distributors and partners is a prerequisite for success. A Canadian company trying to find a new market in the Upper Midwest is almost certainly an unknown quantity, and establishing your bona fides in a direct and personal way is essential. If you're a Canadian company intending to use distributors, for example, you'll have to convince these potential partners that you can support them while they're building your brand with the end user.

### Current and emerging opportunities

The diverse economy of the region provides a broad range of opportunities for Canadian exporters, especially small- and medium-sized companies.

- ▶ The heart of the region's diverse manufacturing sector is in Minnesota, with the dominant industries being related to food products and including major companies such as General Mills, Land O'Lakes and Cargill.
- ▶ Minnesota is an important hub for medical device R&D and production; 3M, Medtronic and St. Jude are leading companies in this industry. The building products sector and the recreational vehicle sector are also very active, with Andersen Windows prominent in the former, and Arctic Cat and Polaris in the latter.
- ▶ Iowa has a range of advanced manufacturing companies, such as Rockwell Collins in aviation and Maytag/Whirlpool in consumer appliances.
- ▶ The services industry is known for three sectors in particular, all centred in Minnesota. First is the hospitality industry: as just one example, the huge Carlson Companies conglomerate, parent of Carlson Wagonlit and Radisson Hotels, has its headquarters there. Second, because of the medical device industry and the high quality of Minnesota's regional hospitals, the state is home to numerous U.S. health insurance companies. Third is retail; the home offices of Best Buy, Supervalu and Target are located in Minneapolis-St. Paul.
- ▶ Excellent opportunities exist for supplying high-value parts to the area's manufacturers of aerospace products, agricultural equipment, recreational vehicles and medical devices.
- ▶ Nebraska and the Dakotas are strong in farming and food production, and Nebraska is home to ConAgra Foods and several Tyson Foods facilities. Agricultural equipment can be an especially promising export throughout the region, given that agri-business here has a long tradition of regard for Canadian farm machinery.
- ▶ The food production and processing industry presents another rich export market; because of the agricultural strength of the region, it operates on such a large scale that it's a manufacturing sector in its own right. The opportunities in this sector include functional food ingredients and specialty niche markets.
- ▶ The renewable-energy sector is expanding rapidly because of Iowa's huge supplies of corn, which make it a major player in ethanol production.

## Selected events and organizations

### Events

- ▶ Big Iron Farm Show: [www.bigironfarmshow.com](http://www.bigironfarmshow.com)
- ▶ Farm Progress Show: [www.farmprogressshow.com](http://www.farmprogressshow.com)
- ▶ Home Building & Remodeling Expo: [www.myshowpage.com/mcc.html](http://www.myshowpage.com/mcc.html)
- ▶ LifeScience Alley Annual Conference: [www.lifesciencealleyconference.org](http://www.lifesciencealleyconference.org)
- ▶ Medical Design and Manufacturing Show Exhibition & Conference: [www.devicelink.com](http://www.devicelink.com)
- ▶ North Dakota Winter Show: [www.northdakotawintershow.com](http://www.northdakotawintershow.com)
- ▶ Triumph of Agriculture Exposition: [www.showofficeonline.com/agexpo.htm](http://www.showofficeonline.com/agexpo.htm)
- ▶ Upper Great Plains Technology Conference and Trade Show: [www.uppergreatplainsotechnology.com](http://www.uppergreatplainsotechnology.com)

### Organizations

- ▶ Greater North Dakota Chamber of Commerce: [www.ndchamber.com](http://www.ndchamber.com)
- ▶ Greater Minneapolis Chamber of Commerce: [www.minneapolischamber.org](http://www.minneapolischamber.org)
- ▶ Omaha Chamber of Commerce: [www.omahachamber.org](http://www.omahachamber.org)
- ▶ South Dakota Chamber of Commerce: [www.sdchamber.biz](http://www.sdchamber.biz)

### Obtaining assistance from the Canadian Trade Commissioner Service

If you need help researching your market, finding key contacts and local company data, obtaining information about visiting, or setting up face-to-face briefings, be sure to contact Canada's consulate in Minneapolis at the following address:

#### Consulate General of Canada

701 Fourth Avenue South, Suite 900  
Minneapolis MN 55415-1899  
USA

Tel.: 612-333-4641

Fax: 612-332-4061

Email: [mnpls-td@international.gc.ca](mailto:mnpls-td@international.gc.ca)

Web: [www.minneapolis.gc.ca](http://www.minneapolis.gc.ca)

## The Midwest

### Illinois, Missouri and Wisconsin

#### The Midwest's market environment

With a population of 24 million and an average per-capita income that's one of the highest in the U.S., the Midwest is a major export market for Canada. During 2006, the region imported more than \$40 billion worth of Canadian goods and services — about 11 per cent of our total exports to the United States. In 2007, it was also home to 52 of the United States' Fortune 500 companies, and to the headquarters of thousands of large, mid-size and small businesses spanning nearly every economic sector.

The mainstays of Canada's trade with the Midwest have traditionally been energy, auto parts, wood and paper products, manufactured goods and agri-food. In addition to these sectors, new industries such as biotechnology, life sciences and nanotechnology are gaining in importance.

The Midwest is a highly competitive marketplace, with 77 countries having trade representations of various kinds in Chicago. This sometimes makes it difficult for Canadian companies to attract notice, despite Canada's proximity to the United States and our similarities in language and culture. Furthermore, Americans here aren't always aware that Canada is the United States' most important trading partner, so Canadian exporters need commitment, perseverance and patience to carve out a niche.

Midwesterners like people to be direct in their business dealings, so you'll have to understand very clearly what your value proposition is, and communicate it quickly and effectively to prospective buyers. Being aware of regional variations in the market will also contribute to your success; the fact that the Chicago area has a large Spanish-speaking population, for example, can significantly affect your marketing strategy.

Chicago operates one of the largest convention and trade show centres in the U.S., and has the second-largest cluster of national trade associations. The Chicago business community also includes groups like World Business Chicago, World Trade Center Chicago and various Chambers of Commerce. All these can be valuable sources of information, contacts and buyers.

#### Current and emerging opportunities

- ▶ Chicago is the nation's industrial heart and the third-largest metropolitan area in the United States. Manufacturing and food processing are among the region's strong suits; Illinois alone has more than 18,000 manufacturers, half of which are in the Metro Chicago area.
- ▶ Chicago is home to North America's largest intermodal container port and rail hub, and second-busiest airport. This transportation and distribution infrastructure, plus the surrounding region's concentration of manufacturing activities, make transport systems and services an attractive market for Canadian companies operating in the transportation industry. Kansas City, Missouri, being the second-largest inland port on the Mississippi, is also an excellent market for this sector.



- ▶ Chicago's position as a prominent financial centre can make it attractive for exporters of financial products and services.
- ▶ The region imports a large range of motor vehicle parts, metal products and plastics. Canadian manufacturers can still do well in these sectors in spite of the falling market share of the Big Three automakers.
- ▶ The Midwest is hugely important to U.S. agriculture, and companies in the farming and agri-food sectors should be able to find buyers across most of the area; Wisconsin would be a priority here. A great deal of agricultural research is also being carried out, using both traditional breeding methods and bioengineering, to improve crop and livestock production. The St. Louis area in particular is becoming an international centre for plant sciences. Ethanol research is particularly strong because of the Midwest's huge agricultural base.
- ▶ Chicago is North America's telecommunications hub and has the world's largest commercial Internet exchange point by volume. It also hosts STAR TAP, the world's only cooperative interconnection point for international advanced networks.
- ▶ The region offers numerous possibilities in the cultural industries. The annual International Exposition of Sculpture Objects & Functional Art (SOFA) is an excellent venue for Canadian artists and galleries to showcase Canadian art. The diverse economy of the consumer market brings many highly paid workers here, and the amount of money spent on the arts is climbing.
- ▶ The Midwest is home to many world-class universities and research institutions, including the University of Chicago, Northwestern University, the Illinois Institute of Technology, the University of Wisconsin, the University of Missouri, Washington University (St. Louis), the Argonne Laboratories, the Danforth Plant Science Centre and the Wisconsin Institute for Discovery. These institutions create pipelines of new products and processes for commercialization, and are potential partners for Canadian companies, institutes and research laboratories.
- ▶ Medical research is an important sector. Numerous medical schools and research institutions operate in the area — Chicago alone boasts five medical schools and several teaching hospitals. These institutions receive billions of dollars in federal grants every year to carry out research in cancer, cardiovascular disorders, stem cells, systems biology, genome technology, cellular and metabolic engineering, bioinformatics and vaccine development.
- ▶ Bio-based manufacturing — making commercial or industrial products, other than food, from biological materials — is an emerging industry here, with important research going on in both university and company laboratories.
- ▶ The Midwest is concentrating on building its high-technology capabilities, which may allow innovative Canadian exporters to take advantage of early opportunities. There's a strong emphasis on commercialization and on technology transfer from research institutions, with several business incubators already in existence or under construction.



## Selected events and organizations

### Events (by sector)

#### Agri-food

- ▶ All Things Organic Conference and Trade Show: [www.organicexpo.com](http://www.organicexpo.com)
- ▶ American Convention of Meat Processors & Suppliers Expo: [www.aamp.com](http://www.aamp.com)
- ▶ Fancy Food Show/Global Food & Style Expo: [www.specialtyfood.com](http://www.specialtyfood.com)
- ▶ National Restaurant Association Show: [www.restaurant.org/show](http://www.restaurant.org/show)
- ▶ United Produce Expo & Conference: [www.uffva.org](http://www.uffva.org)
- ▶ World Dairy Expo: [www.world-dairy-expo.com](http://www.world-dairy-expo.com)
- ▶ Worldwide Food Expo: [www.worldwidefood.com](http://www.worldwidefood.com)
- ▶ Private Label Manufacturers Association Show: [www.plma.com](http://www.plma.com)

#### Consumer products

- ▶ Beckman's Handcrafted Gift Show:  
[www.beckmans.com](http://www.beckmans.com)
- ▶ GlobalShop: [www.globalshop.org](http://www.globalshop.org)
- ▶ NEOCON: [www.neocon.com](http://www.neocon.com)
- ▶ SOFA: [www.sofaexpo.com](http://www.sofaexpo.com)
- ▶ STYLEMAX: [www.stylemax.org](http://www.stylemax.org)
- ▶ International Casual Furniture and Accessories Market:  
[www.mmart.com/casualmarket](http://www.mmart.com/casualmarket)
- ▶ Chicago Market: Living and Giving:  
[www.merchandisemart.com/livingandgiving](http://www.merchandisemart.com/livingandgiving)
- ▶ Men's Wear Collective:  
[www.mmart.com/chicagocollective](http://www.mmart.com/chicagocollective)

#### Building products

- ▶ Kitchen/Bath Industry Show:  
[www.kbis.com](http://www.kbis.com)
- ▶ International Home & Housewares Show: [www.housewares.org](http://www.housewares.org)
- ▶ Midwest Builders Show: [www.midwestbuildersshow.com](http://www.midwestbuildersshow.com)
- ▶ Midwest Home and Design Show: [www.midwesthomeexpo.com](http://www.midwesthomeexpo.com)

### Obtaining assistance from the Canadian Trade Commissioner Service

If you need help researching your market, finding key contacts and local company data, obtaining information about visiting, or setting up face-to-face briefings, be sure to contact the Trade Commissioner Service team at Canada's Consulate General in Chicago at the following address:

#### Consulate General of Canada

180 North Stetson Avenue, Suite 2400  
Chicago IL 60601  
USA

Tel.: 312-616-1860

Fax: 312-616-1878

Email: [chcgo-td@international.gc.ca](mailto:chcgo-td@international.gc.ca)

Web: [www.chicago.gc.ca](http://www.chicago.gc.ca)

### Information and communications technologies

- ▶ Advertising Specialty Institute Chicago Show: [www.asishow.com/Chicago](http://www.asishow.com/Chicago)
- ▶ NXTComm: [www.nxtcommshow.com](http://www.nxtcommshow.com)
- ▶ Radtech UV/EB Technology Expo & Conference: [www.radtech.org](http://www.radtech.org)
- ▶ WiMAX World USA: <http://usa.wimaxworld.com>

### Life sciences and environmental technologies

- ▶ ASCO Meeting: [www.asco.org](http://www.asco.org)
- ▶ RSNA Scientific Assembly and Annual Meeting: [www.rsna.org](http://www.rsna.org)
- ▶ Waste Expo: [www.wasteexpo.com](http://www.wasteexpo.com)

### Manufacturing

- ▶ Fabtech International & AWS Welding Show: [www.fmafabtech.com](http://www.fmafabtech.com)
- ▶ IMTS (International Manufacturing Technology Show): [www.imts.com](http://www.imts.com)
- ▶ National Manufacturing Week: [www.manufacturingweek.com](http://www.manufacturingweek.com)
- ▶ NPE (National Plastics Expo) [www.npe.org](http://www.npe.org)
- ▶ PackExpo: [www.packexpo.com](http://www.packexpo.com)
- ▶ ProMat: [www.promatshow.com](http://www.promatshow.com)

### Organizations

- ▶ Chicagoland Chamber of Commerce: [www.chicagolandchamber.org](http://www.chicagolandchamber.org)
- ▶ FMI (Food Marketing Institute): [www.fmi.org](http://www.fmi.org)
- ▶ Illinois Biotechnology Industry Association (iBio): [www.ibio.org](http://www.ibio.org)
- ▶ International Trade Club of Chicago: [www.itcc.org](http://www.itcc.org)
- ▶ World Business Chicago: [www.worldbusinesschicago.com](http://www.worldbusinesschicago.com)
- ▶ World Trade Center Illinois: [www.wtcc.org](http://www.wtcc.org)

## The Great Lakes

### Michigan, Ohio, Indiana and Kentucky

#### The Great Lakes market environment

The number-one market for Canadian exporters lies around the western perimeter of the Great Lakes, in the traditional industrial heartland of America. In the diversity and scale of its opportunities, from automobile manufacturing to pharmaceutical research, the region has few equals in the United States.

The Great Lakes market environment comprises Ohio, Indiana, Kentucky and Michigan, and it's a very large market — at least 6 million people live within a 60-mile radius of Detroit alone. In 2006, Canada shipped \$90 billion worth of goods to the region, a full 25 per cent of our total exports to the United States in that year. The largest shipments to the region were made up of traditional exports: vehicles and their components, oil and gas, metals and lumber. But other sectors are strong as well; among them are advanced manufacturing technologies, medical technologies, pharmaceuticals and energy.

Many Canadian companies that export to this region do so partly because it's one of the most accessible of all U.S. markets. Because of this market's huge size, however, a company must have the manufacturing and financial capacity to cope with unexpectedly large orders from American customers. And it's often a good strategy to set up a distribution network that uses American distributors or agents, rather than try to operate in the market on your own.

#### Current and emerging opportunities

The Great Lakes states are economically very diverse, so there's likely to be something here for many Canadian companies.

- ▶ Michigan has historically been the U.S. automotive industry's heartland. The sector commands the largest private-sector R&D budget in the United States, and numerous global corporations have established engineering offices, sales offices and research centres in the region. As a result, it has attracted a large concentration of manufacturing firms related to the automotive sector, together with manufacturers of rubber, plastics and vehicle electronics.
- ▶ Michigan ranks high in service sector industries such as information technologies, medical research and knowledge-based industries in general.

#### Obtaining assistance from the Canadian Trade Commissioner Service

If you need help researching your market, finding key contacts and local company data, obtaining information about visiting, or setting up face-to-face briefings, be sure to contact the Trade Commissioner Service team at Canada's Consulate General in Detroit at the following address:

##### Consulate General of Canada

600 Renaissance Center, Suite 1100  
 Detroit MI 48243-1798  
 USA

Tel.: 313-567-2340

Fax: 313-567-2164

Email: [dtrot-td@international.gc.ca](mailto:dtrot-td@international.gc.ca)

Web: [www.detroit.gc.ca](http://www.detroit.gc.ca)

- ▶ Another sector with major potential is clean energy and its associated products and services, including R&D, manufacturing and market deployment. Biofuels and alternative fuels are of considerable interest to U.S. companies and research institutions, and this can lead to partnerships with Canadian firms. The Ohio Coal Research Center at Ohio University and the Canadian Clean Power Coalition, for example, are collaborating on initiatives to reduce the greenhouse gas emissions and other pollutants from coal-fired electricity plants. The region has a huge appetite for conventional energy, of course; Ohio in particular produces large quantities of coal and has a big hydroelectric industry as well.
- ▶ Medical and pharmaceutical R&D, with industry concentrations around Detroit, Indianapolis, Louisville and Kentucky, is another growth sector, and many American firms are open to the services, products and partnerships that Canadian companies can offer. Canadian manufacturers of generic pharmaceuticals can look for opportunities as the state Medicaid programs seek cheaper sources of drugs. Hospitals remain the largest buyers of medical supplies and health services, but private distributors and wholesalers are also potential customers for Canadian businesses.
- ▶ Housing construction has softened across the region, as it has in most of the United States, but opportunities persist for value-added goods such as windows, doors, engineered wood products and, potentially, manufactured housing.
- ▶ Canadian agri-food producers should be aggressive in pursuing this market. Wines, gourmet products, organic or natural foods and nutraceuticals are among the potential sales prospects.

### **Selected events and organizations**

#### **Events**

- ▶ North American International Auto Show: [www.naias.com](http://www.naias.com)
- ▶ SAE World Congress: [www.sae.org/congress](http://www.sae.org/congress)

#### **Organizations**

- ▶ Detroit Regional Chamber of Commerce: [www.detroitchamber.com](http://www.detroitchamber.com)
- ▶ Great Lakes Manufacturing Council: [www.greatlakesmanufacturing.org](http://www.greatlakesmanufacturing.org)
- ▶ Indiana Chamber of Commerce/Indiana World Trade Center: [www.indianachamber.com](http://www.indianachamber.com)
- ▶ Kentucky World Trade Center: [www.kwtc.org](http://www.kwtc.org)
- ▶ Manufacturing Advocacy & Growth Network: [www.magnetnetwork.org](http://www.magnetnetwork.org)
- ▶ Society of Manufacturing Engineers: [www.sme.org](http://www.sme.org)
- ▶ Society of Automotive Engineers: [www.sae.org](http://www.sae.org)
- ▶ World Trade Center Detroit: [www.wtcdw.com](http://www.wtcdw.com)

## The Northeast

### Upstate New York, Western Pennsylvania and West Virginia

#### The Northeast's market environment

The Northeast region includes western Pennsylvania, West Virginia and upstate New York, the last being loosely defined as the area north of New York City's metropolitan area. The region's major industrial and business concentrations lie in and around several large urban centres: for upstate New York, these are Buffalo, Rochester, Syracuse, Binghamton and Watertown; for West Virginia, they're Morgantown and Charleston; and for western Pennsylvania, it's Pittsburgh.

For an exporter in Canada, one of the Northeast's most important characteristics is its very close connection to manufacturing and business clusters on the Canadian side of the border. This connection, and the huge volume of bilateral trade it generates, is in fact much more than a simple import-export relationship in which Canadian companies sell goods to U.S. firms and consumers, and the American businesses return the favour. It's based instead on a myriad of tightly integrated, cross-border supply chains that support related industries in both countries.

Many of the opportunities for Canadian exporters lie in establishing their companies as links within these supply chains. This makes a great deal of sense from a logistical viewpoint, since 52 per cent of all U.S. manufacturing facilities lie within a one-day trucking radius of upstate New York. The Buffalo area is also the region's major distribution and logistics centre, which makes it an especially attractive market if your company is located within Ontario's Golden Horseshoe.

Fifteen years ago the Northeast was in serious economic straits, with scores of companies moving south to the Sun Belt or simply closing their doors. Others, though, moved up the value chain, helped along by the region's large pool of highly skilled labour, and today the region is home to numerous Fortune 500 companies including Alcoa, U.S. Steel, Corning, Kodak and Xerox. Helping to support this ongoing renaissance are several large and important universities, including Carnegie Mellon, Cornell, Vassar and the University of Buffalo.

### Current and emerging opportunities

Especially for Canadian companies involved in advanced technology — ICT, imaging and biomedicine, for example — there are numerous large corporations in the Northeast that are very interested in Canadian products, services and technological partnerships. But there are plenty of opportunities in other sectors as well.

- ▶ The service and manufacturing end of the automobile and transportation industry is very strong in the Northeast. General Motors and Ford are among the largest employers in the manufacturing sector here, and are thoroughly integrated with their operations in Canada. Toyota has a major manufacturing plant in West Virginia, which supplies engines to their assembly operation in Cambridge, Ontario. On the transportation side, Canada's Bombardier Inc. has production facilities near Pittsburgh and in Plattsburgh, NY.
- ▶ Activity in the life sciences is vigorous and is expanding rapidly. One major player is the Buffalo Niagara Medical Campus, whose member institutions work in numerous fields of research — cancer, structural biology, visual impairment, hearing and speech, and bioinformatics. Rochester, NY, is a high-technology centre for medical IT systems and for medical and dental imaging.
- ▶ The Rochester region has a cluster of optics, photonics and imaging companies including Kodak, Xerox, Bausch and Lomb, and Corning. The photonics side of this cluster has already developed links to several Canadian counterparts such as the Ottawa Photonics Cluster, the Canadian Photonics Consortium and the Ontario Photonics Technology Industry Cluster.
- ▶ There's an important aerospace sector with significant requirements for high-tech systems, components and services. Amherst Systems (a division of Northrop Grumman), Moog and General Dynamics all have facilities in and around Buffalo.
- ▶ Other high-technology sectors, especially ICT, offer huge opportunities as well. Pittsburgh in particular is a major centre for robotics R&D, supported by institutions like the Robotics Institute at Carnegie Mellon University and the National Robotics Engineering Consortium.
- ▶ West Virginia's economy has long been based on natural resources, especially coal. As a result, there's considerable interest in "green" approaches to coal use, such as gasification; the University of West Virginia is quite active in this area.
- ▶ Pennsylvania has a strong chemical industry, based mainly in and around Pittsburgh. In West Virginia, chemicals are also an important contributor to the economy; dozens of companies are active in the state, including major corporations such as Dow, DuPont and Union Carbide. Calgary's Nova Chemicals has a large subsidiary operation here.

### Selected organizations

- ▶ Buffalo Niagara Medical Campus: [www.bnmc.org](http://www.bnmc.org)
- ▶ Carnegie Mellon Robotics Institute: [www.ri.cmu.edu](http://www.ri.cmu.edu)
- ▶ Carnegie Mellon National Robotics Engineering Centre: [www.rec.ri.cmu.edu](http://www.rec.ri.cmu.edu)
- ▶ Great Lakes Manufacturing Council: [www.greatlakesmanufacturing.org](http://www.greatlakesmanufacturing.org)
- ▶ Medtech Association: [www.medtech.org](http://www.medtech.org)
- ▶ Pennsylvania Department of Economic Development: [www.newpa.com](http://www.newpa.com)
- ▶ Pittsburgh Life Sciences Greenhouse: [www.plsg.com](http://www.plsg.com)
- ▶ Pittsburgh Technology Council: [www.pghtech.org](http://www.pghtech.org)
- ▶ Rochester Business Alliance:  
[www.rochesterbusinessalliance.com](http://www.rochesterbusinessalliance.com)
- ▶ Syracuse Center Of Excellence in  
Environmental & Energy Systems:  
<http://coees.internetconsult.com>
- ▶ World Trade Center Buffalo Niagara:  
[www.wtcbn.org](http://www.wtcbn.org)

#### Obtaining assistance from the Canadian Trade Commissioner Service

If you need help researching your market, finding key contacts and local company data, obtaining information about visiting, or setting up face-to-face briefings, be sure to contact the Trade Commissioner Service team at Canada's Consulate General in Buffalo at the following address:

##### Consulate General of Canada

1 HSBC Center, Suite 3000  
Buffalo NY 14203-2884  
USA

Tel.: 716-858-9500

Fax: 716-858-9562

Email: [bfalo-td@international.gc.ca](mailto:bfalo-td@international.gc.ca)

Web: [www.buffalo.gc.ca](http://www.buffalo.gc.ca)

## Assistance for Exporters

### How EDC Can Help

#### EDC's financial services

Since 1945, Export Development Canada has been helping Canadian companies reduce the financial risks of selling their goods and services outside Canada. Some of EDC's major services for Canada's exporters include:

- ▶ Accounts Receivable Insurance to cover up to 90 per cent of losses due to non-payment resulting from political or commercial risks.
- ▶ Single Buyer Insurance which can be used to cover an unlimited number of sales to the same customer for six months on contracts worth up to US\$250,000.
- ▶ Contract Frustration Insurance to protect against losses related to specific export contracts for services, capital goods or projects.
- ▶ Performance Security Guarantees to cover 100 per cent of losses incurred by a bank when a foreign customer makes a draw or call on a bonding instrument such as an irrevocable letter of credit or letter of guarantee. PSG eliminates the need for additional working capital as collateral for posting of a bond.
- ▶ Performance Security Insurance to cover Canadian companies against 95 per cent of losses incurred when a foreign customer makes a wrongful call on a bonding instrument issued by a bank as contract-performance security.
- ▶ Political Risk Insurance to protect overseas assets such as equipment or manufacturing facilities against political risks, covering up to 90 per cent of losses.
- ▶ Financing solutions to help with issues such as pre-shipment, promoting a company in a new market and customer financing.



## Help with bonding

A bond is a financial guarantee to a company's customer that the company will abide by the terms of the contract. EDC doesn't issue bonds directly to a company, but can work with the company's bank to arrange guarantees or insurance that will protect it.

Before issuing a bond, the bank will usually require the firm to provide security by freezing cash in its account. This protects the bank if the company fails to perform and if the customer calls the bond — that is, if the customer demands that the value of the bond be paid out.

EDC helps out here by guaranteeing to the bank that it will be reimbursed if a firm's customer demands that the bond be paid. This frees up the company's cash flow and, if the customer does call the bond, EDC will pay the bank so the company doesn't have to.

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## What will it cost?

EDC has several different types of insurance. Which one is best for a particular firm and how much it will cost depends on the company's needs. EDC will need to know about the goods or services the company is exporting, the market it's shipping to and the payment terms the customer is offering. Given this information, EDC can provide an estimate, and then the company can submit an application for an exact quote. A company specifically interested in Accounts Receivable Insurance can apply online at [www.edc.ca/english/insurance\\_accounts\\_receivable.htm](http://www.edc.ca/english/insurance_accounts_receivable.htm).

## Help with finding new markets and buyers

EDC can provide loans to a company's foreign customers to encourage them to buy Canadian goods and services provided that such loans meet EDC's financing criteria. EDC does this in several ways, two of which are by arranging lines of credit with foreign banks so they can lend money to local businesses, or by setting up direct loans to a Canadian company's customer. You can find more information at [www.edc.ca/EDCfinancing](http://www.edc.ca/EDCfinancing).

If you need cash to promote your company in a new market, attend a trade show or increase your production capacity, EDC can help through *EXPORTExpressCredit*, a program for providing unsecured small-business loans. It's designed for Canadian exporters with annual sales of less than \$5 million, and provides unsecured loans of up to \$50,000 with flexible repayment terms of up to two years. For more information, refer to [www.edc.ca/english/financing\\_export\\_express\\_credit.htm](http://www.edc.ca/english/financing_export_express_credit.htm).

### Assistance for specific markets

EDC's decision to extend help in a particular market depends on the market and what a company wants to do there. Some countries and sectors are inherently more risky than others. It also depends on the laws of the relevant jurisdiction and whether they permit lending activities or the issuance of insurance policies or guarantees by EDC. However, EDC's role is to help Canadian exporters sell their goods and services outside Canada, so if EDC can find a way to make it happen, it will. For more information about these and other questions, contact an EDC representative at 1-866-283-2957.

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### How the Canadian Trade Commissioner Service Can Help

The Canadian Trade Commissioner Service provides six core services to Canadian exporters. All services are free of charge and are offered to companies that have done their preparatory market research and selected their market. The services cover:

- ▶ market prospect assessment;
- ▶ key contacts searches;
- ▶ information on local companies;
- ▶ practical guidance about organizing business trips to the region;
- ▶ face-to-face briefings on current market intelligence; and
- ▶ advice on dealing with crucial business challenges.

For general information about these services and how to register for them, visit the Canadian Trade Commissioner Service web site at [www.infoexport.gc.ca](http://www.infoexport.gc.ca).

The Trade Commissioner Service also operates Regional Offices across Canada. To find the Regional Office nearest you, refer to [www.infoexport.gc.ca/regions](http://www.infoexport.gc.ca/regions).

## EDC Regional Offices

### Western Region

contactwest@edc.ca  
Tel.: 403-537-9800  
Fax: 403-537-9811

#### Calgary

Home Oil Tower, Suite 606  
324-8th Avenue S.W.  
Calgary AB  
T2P 2Z2  
**1-888-332-3777**  
Tel.: 403-537-9800  
Fax: 403-537-9811

#### Edmonton

10180-101 Street, Suite 1000  
Edmonton AB  
T5J 3S4  
**1-888-419-5256**  
Tel.: 780-702-5233  
Fax: 780-702-5235

#### Vancouver

One Bentall Centre,  
Suite 1030  
505 Burrard Street, Box 58  
Vancouver BC  
V7X 1M5  
**1-877-512-2299**  
Tel.: 604-638-6950  
Fax: 604-638-6955

#### Winnipeg

Commodity Exchange Tower  
Suite 2075, 360 Main Street  
Winnipeg MB  
R3C 3Z3  
**1-888-350-0127**  
Tel.: 204-975-5090  
Fax: 204-975-5094

### Ontario Region

contactontario@edc.ca  
Tel.: 416-640-7600  
Fax: 1-866-546-0466

#### London

148 Fullarton Street  
Suite 1512  
London ON  
N6A 5P3  
**1-866-278-2300**  
Tel.: 519-963-5400  
Fax: 1-866-546-0408

#### Mississauga

1 City Centre Drive  
Mississauga ON  
L5B 1M2  
**1-866-735-6993**  
Tel.: 905-366-0300  
Fax: 905-366-0332

#### Ottawa

151 O'Connor Street  
Ottawa ON  
K1A 1K3  
**1-866-278-2300**  
Tel.: 613-597-8688  
Fax: 613-598-3811

#### Toronto

150 York Street  
Suite 810, P.O. Box 810  
Toronto ON  
M5H 3S5  
**1-866-278-2300**  
Tel.: 416-640-7600  
Fax: 1-866-546-0466

### Quebec Region

contactquebec@edc.ca  
Tel.: 514-908-9200  
Fax: 514-878-9891

#### Montréal

800 Victoria Square  
Suite 4520  
P.O. Box 124,  
Tour de la Bourse  
Montréal QC  
H4Z 1C3  
**1-866-278-2300**  
Tel.: 514-908-9200  
Fax: 514-878-9891

#### Quebec City

2875 Laurier Boulevard  
Suite 1340  
Ste-Foy QC  
G1V 2M2  
**1-866-278-2300**  
Tel.: (418) 266-6130  
Fax: (418) 266-6131

### Atlantic Region

contactatlantic@edc.ca  
Tel.: 902-442-5205  
Fax: 902-442-5204

#### Halifax

1959 Upper Water Street  
Suite 1406  
Tower 1  
Halifax NS  
B3J 3N2  
**1-866-278-2300**  
Tel.: 902-442-5205  
Fax: 902-442-5204

#### Moncton

735 Main Street, Suite 400  
Moncton NB  
E1C 1E5  
**1-866-278-2300**  
Tel.: 506-851-6066  
Fax: 506-851-6406

#### St. John's

90 O'Leary Avenue  
St. John's NL  
A1B 2C7  
**1-866-278-2300**  
Tel.: 709-772-8808  
Fax: 709-772-8693

[www.edc.ca](http://www.edc.ca)





REGIONAL MARKETS OF THE UNITED STATES