



Country Report

# CANADA

A study of Pakistan-Canada trade relations  
and Top Potential Items for Export to the  
Canadian Market



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TRADE DEVELOPMENT AUTHORITY OF PAKISTAN

## CONTENTS

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List of Tables.....	4
List of Figures .....	4
Executive Summary.....	5
Country profile .....	6
Pakistan’s Major Exports to Canada.....	7
Export Products Dynamics Matrix.....	8
Potential Items.....	11
HS 300490 Medicaments .....	11
Market Share & ECI.....	11
What has worked for Australia? .....	12
Edge for Singapore.....	12
Importers Database .....	13
Tariff requirements .....	13
Non-tariff requirements .....	13
HS 901890 Surgical Instruments .....	14
Market Share & ECI.....	14
What has worked for Vietnam? .....	15
What has worked for Thailand?.....	16
What has worked for Australia? .....	16
What has worked for Malaysia? .....	17
Importers Database .....	17
Tariffs .....	18
Non-tariff requirements .....	18
HS 611030 Jerseys, Pullover, Cardigans of Man-Made Fibers.....	19
Market Share & ECI.....	19
Bangladesh’s strategy.....	20
What has worked for Vietnam? .....	20
What has worked for Cambodia? .....	21

What has worked for Sri Lanka? .....	21
Importers database .....	21
Tariffs .....	24
Non-tariff requirements .....	24
HS 711319 Articles of jewelry and parts thereof, of precious metal other than silver .....	24
Market Share & ECI.....	24
What works for India?.....	25
What works for Singapore?.....	26
Importers Database .....	27
Tariffs .....	28
Non-tariff requirements .....	28
HS 210690 Food preparations n.e.s .....	29
Market Share & ECI.....	29
What India has done?.....	30
What Indonesia has done?.....	30
What Sri Lanka has done? .....	30
Importers Database .....	31
Tariffs .....	33
Non-tariff requirements .....	34
Input from Trade Mission.....	34
TDAP Exhibition Calendar.....	34
SWOT Analysis .....	35
Strengths.....	35
Weaknesses .....	35
Opportunities .....	35
Threats.....	36
Conclusion and Recommendations.....	37
References .....	40
Appendix 1 .....	42
Product wise Market Share in Canadian market.....	42
Appendix 2 .....	44

Tariffs .....	44
HS 300490 Medicaments .....	44
HS 611030 Jerseys, Pullovers, Cardigans etc. of MMF .....	45
HS 711319 Articles of Jewelry other than silver .....	45
HS 210690 Food Preparations .....	46
Appendix 3 .....	50
Free Trade Agreements.....	50
Appendix 4 .....	52
Textile Industry Labor Costs.....	52

## LIST OF TABLES

---

Table 1: Export Competitiveness Index for HS 300490 Medicaments .....	11
Table 2: Additional Information for Export of HS 300490 Medicaments .....	12
Table 3: Canada's Top Importers for HS 300490 Medicaments .....	13
Table 4: Non-tariff measures for HS 300490 Medicaments .....	14
Table 5: Export Competitiveness Index for HS 901890 Surgical Instruments.....	14
Table 6: Additional Information for export of HS 901890.....	17
Table 7: Canada's Top Importers for HS 901890 Surgical Instruments .....	17
Table 8: Non-tariff measures for HS 901890 Surgical Instruments .....	18
Table 9: Export Competitiveness Index for HS 611030 Jerseys, Pullover, Cardigans of MMF..	19
Table 10: Additional Information for export of HS 611030 Jerseys etc. of MMF.....	21
Table 11: Canada's Top Importers for HS 611030 Jerseys, Pullovers, Cardigans of MMF.....	21
Table 12: Non-tariff measures for HS 611030 Jerseys, Pullovers etc. of MMF.....	24
Table 13: Export Competitiveness Index for HS 711319 Articles of Jewelry other than silver...24	
Table 14: Additional Information for export of HS 711319 Articles of Jewelry.....	26
Table 15: Canada's Top Importers for HS 711319 Articles of Jewelry other than silver .....	27
Table 16: Non-tariff measures for HS 711319 Articles of Jewelry other than silver .....	28
Table 17: Export Competitiveness Index for HS 210690 Food Preparations.....	29
Table 18: Additional Information for export of HS 210690 Food Preparations .....	31
Table 19: Canada's Top Importers for HS 210690 Food Preparations n.e.s.....	31

## LIST OF FIGURES

---

Figure 1 Canada's GDP and Trade figures .....	6
Figure 2 Canada's Major Export Items.....	6
Figure 3 Canada's Major Import Items .....	6
Figure 4 Pakistan's Major Exports to Canada.....	7
Figure 5: Export Products Dynamics Matrix .....	8
Figure 6: EPD Matrix of Pakistan's Exports to Canada .....	9
Figure 7: Pakistan's Market Share in Canada.....	9
Figure 8: Further EPD Matrix.....	10
Figure 9: HS 300490 Medicaments exports to Canada 2013-17 .....	12
Figure 10: HS 901890 Surgical Instruments exports to Canada 2013-17 .....	15
Figure 11: Distribution channel for Surgical Instruments.....	16
Figure 12: HS 611030 Jerseys etc. of MMF exports to Canada 2013-17 .....	20
Figure 13: HS 711319 Articles of Jewelry exports to Canada 2013-17 .....	25
Figure 14: HS 210690 Food Preparations exports to Canada 2013-17.....	29
Figure 15 FTA Advantages for Exports.....	37

## EXECUTIVE SUMMARY

Canada is a business friendly country with enormous trade potential. Its imports amounted to USD 432bn in 2017. Pakistan's exports to Canada amount to USD 254mn, making Pakistan the 60<sup>th</sup> largest trading partner of Canada (Pakistan Bureau of Statistics, 2018). During 2018, knitwear and ready-made garments (RMG) exhibited the greatest increase in exports due to surging demand in Canada.

	USD '000		
	2017-18	2016-17	Variance
Knitwears	50,280	35,579	14,701
Ready-made garments	36,684	32,259	4,425
Leather gloves	19,452	16,344	3,108

The highest exports to Canada were **men's trousers of cotton (HS 620342)**, **PET resin (HS 390769)**, **leather gloves (HS420329)**, **bedlinen of cotton (HS 630231)**, **women's trousers of cotton (HS 620462)**, **jerseys (HS 611020)**, **toilet linen (HS 630260)** and **basmati rice (HS 100630)**.

While the aforementioned items are the highest exported products to Canada, analysis indicates that the markets for medicaments (HS 300490), surgical instruments (HS 901890), Jerseys, pullovers, cardigans of MMF (HS 611030), articles of jewelry other than silver (HS 711319) and food preparations (HS 210690) are much larger and the key to increasing Pakistan's exports to Canada lies in exploring the export potential of these items.

Details of importers of these items are also provided in this report for the benefit of Pakistani exporters, along with tariff and non-tariff requirement details.

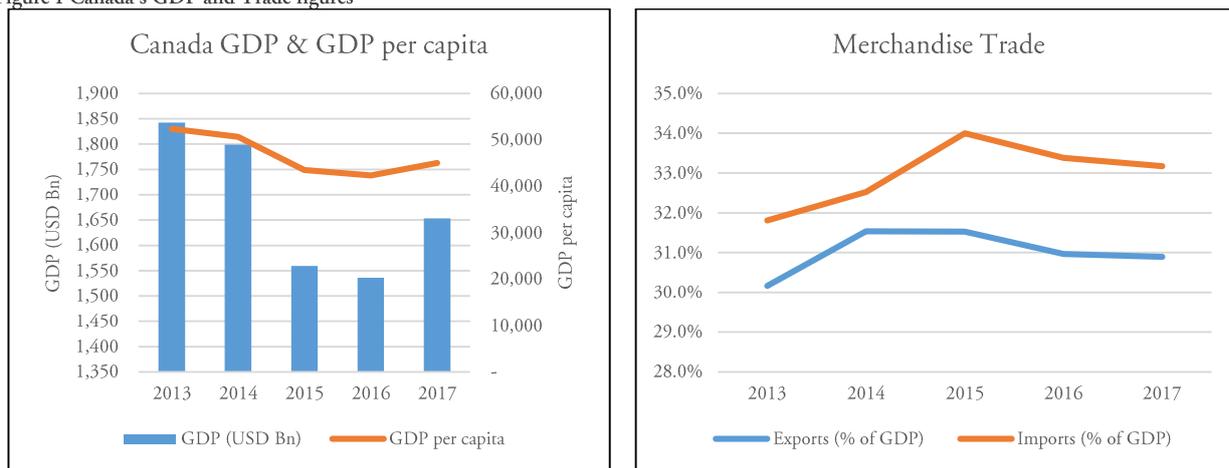
While Canada is very conducive towards trade with other countries, the crucial component of increasing trade with Canada appears to be its trade agreements. Canada's largest trading partners appears to be countries with which it has trade agreements in force. Canada has a total of 58 trade and investment promotion agreements in force with various countries and blocs. The most important of which is NAFTA. Trade agreements help make exports cheaper by reducing import duties and keeping duties payable constant during economic swings. This makes the exporters from signatory parties more preferable than the exporters with which Canada does not have any trade agreements.

This report also recommends increasing the use of e-commerce platforms such as PriceOye.pk, Alibaba or Daraz.pk, which is a subsidiary of Alibaba, as a strategy to increase exports to Canada. Exporters from other countries such as Vietnam, India and Thailand are already exploring this strategy and have their own country specific channels on Alibaba dedicated to selling goods from their respective countries. Pakistani exporters should look towards the possibility of using e-commerce platforms, either international or local, to sell their wares as this will lead to cost reduction including many of the expenses such as booking the stall space, travelling expenses, accommodation etc.

## COUNTRY PROFILE

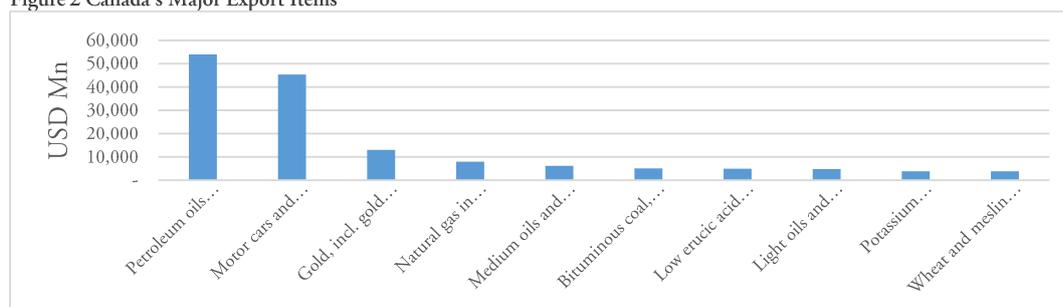
Canada is the world's second largest country by area, however it is relatively small in terms of population with only 34.7 million people according to World Bank. English and French are the official languages of the country. The country's currency is Canadian dollar, which is equivalent to 0.77 US dollars. Canada's 2017 GDP was USD 1.65trn and inflation was 1.42% for the corresponding period. GDP per capita is USD 45,032.

Figure 1 Canada's GDP and Trade figures



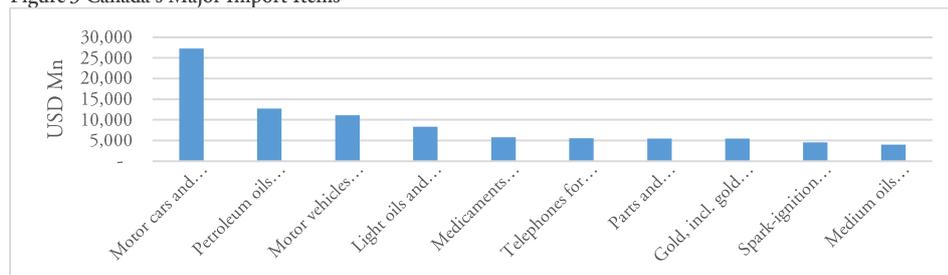
Exports stood at 33.1% of GDP while imports were 31% of GDP. Canada has an excellent business environment, with a liberal policy towards private enterprise, a well-functioning labor market, strong management capabilities, deep capital markets, good infrastructure and liberal immigration policies. Canada's total exports amounted to USD 420bn in 2017. Major export items include petroleum oils, motor cars, heavy machinery, wood and precious metals.

Figure 2 Canada's Major Export Items



Canada's total imports in 2017 amounted to USD 432bn. Major imports include capital goods such as heavy machinery, motor cars, electrical equipment, petroleum oils, and plastics.

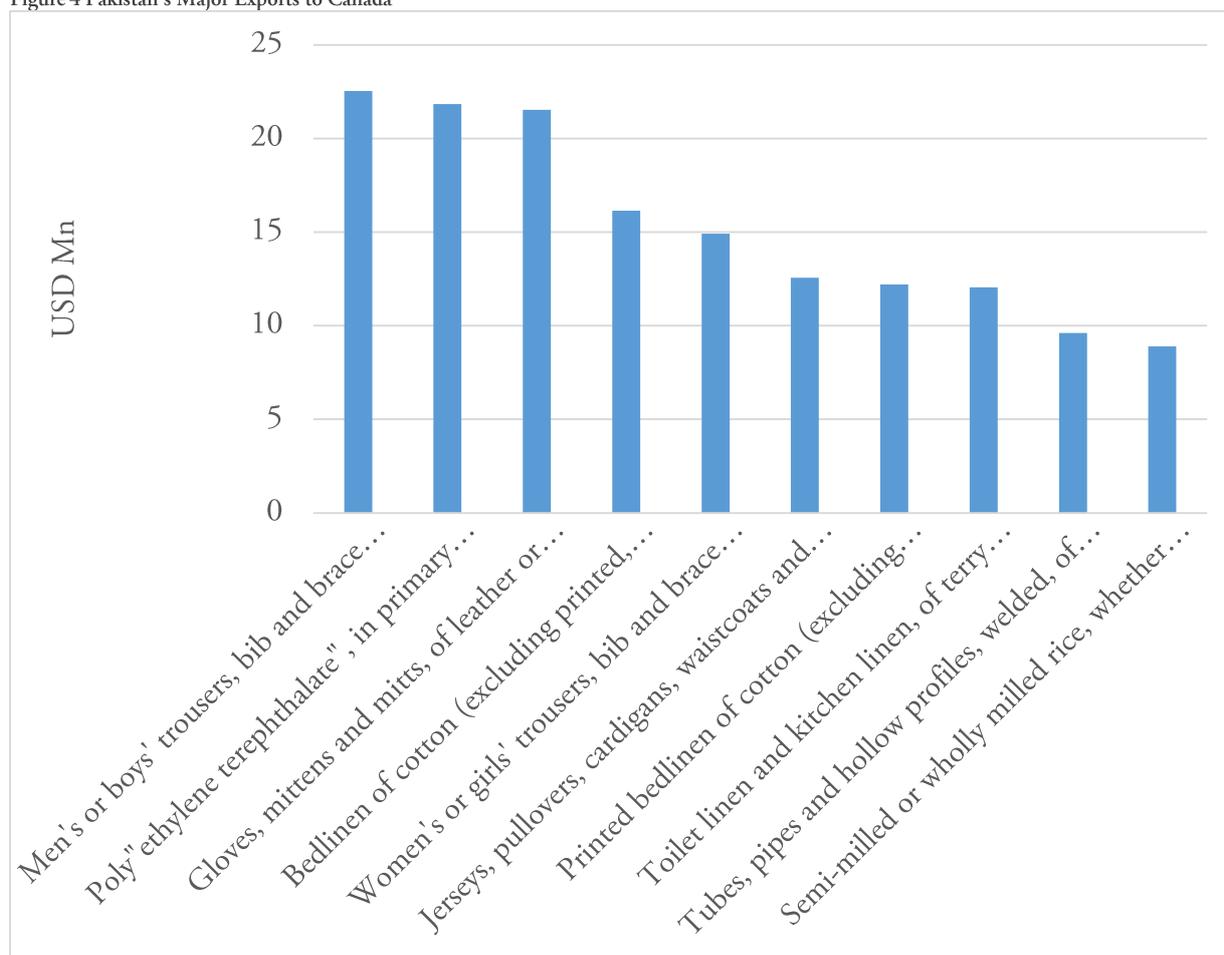
Figure 3 Canada's Major Import Items



## PAKISTAN'S MAJOR EXPORTS TO CANADA

During FY18, Pakistan's exports to Canada totaled approximately USD 254mn (Pakistan Bureau of Statistics, 2018). Pakistan's major exports to Canada consist of **men's trousers of cotton (HS 620342)**, **PET resin (HS 390769)**, **leather gloves (HS420329)**, **bedlinen of cotton (HS 630231)**, **women's trousers of cotton (HS 620462)**, **jerseys (HS 611020)**, **toilet linen (HS 630260)** and **rice (HS 100630)**. As per Canada's customs tariff treatment, Pakistan is afforded MFN (Most Favored Nation) and GPT (General Preferential Tariff) rates of duty (Canada Border Services Agency, 2018). Figure 4 shows the amounts of Pakistan's top exports to Canada.

Figure 4 Pakistan's Major Exports to Canada



## EXPORT PRODUCTS DYNAMICS MATRIX

The Export Products Dynamics (EPD) Matrix is an analysis tool that divides exports into 4 categories:

Figure 5: Export Products Dynamics Matrix

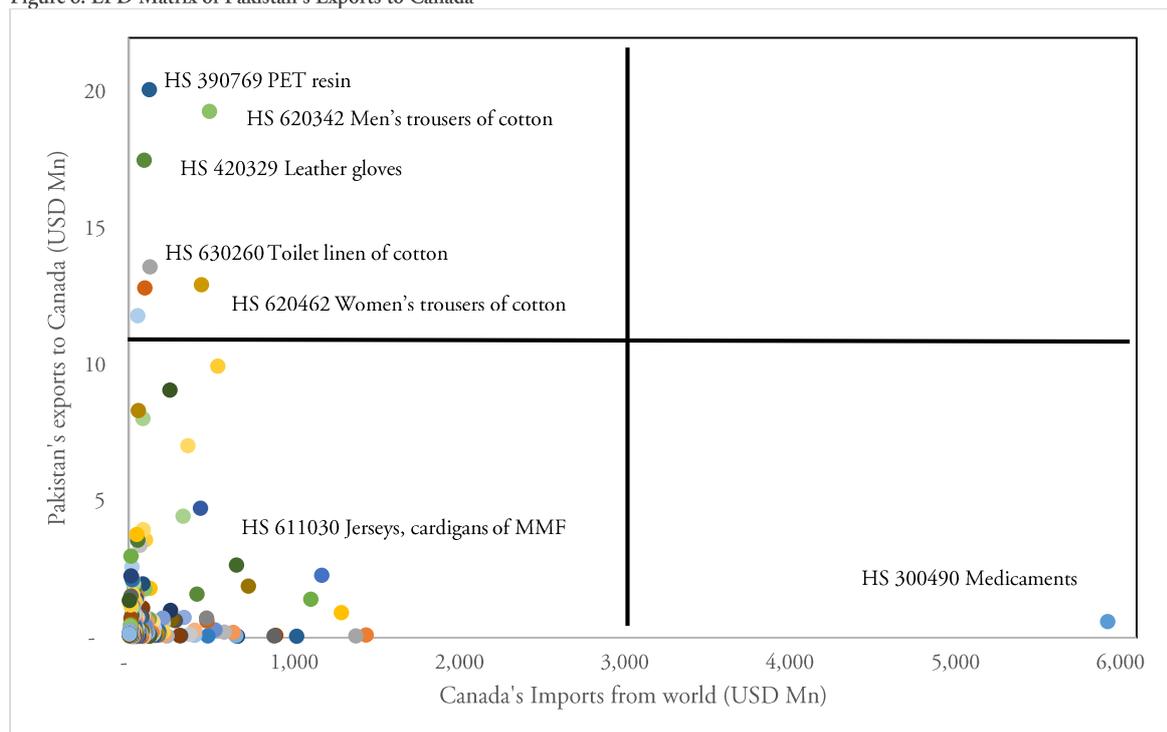


(Source: Estherhuizen, 2006)

By taking Canada's imports from the world on the x-axis and Pakistan's exports to Canada on the y-axis, we can plot the exports of different Pakistani products and see their performance in relation to their demand in the Canadian market. Consequently, items which are high in demand among Canadian imports and high in Pakistan's exports to Canada are called rising stars. Items which are high among Pakistan's exports to Canada but low among Canada's imports are falling stars. Items which are high in demand among Canada's imports but have a low share in Pakistan's exports to Canada are labeled lost opportunities and therefore every effort should be made to boost them up to the rising stars category by branding, marketing and more trade fairs featuring such products. Items which are low among Canada's imports and low among Pakistan's exports to Canada are labeled retreat. While trade fairs and promotional activities may push such items into the falling stars category, they will still not be able to move into the rising stars category due to low demand in the Canadian market.

Using the EPD matrix tool, the top 200 products that Pakistan exported to the Canadian market were plotted to see how they fared. The results are given in Figure 6.

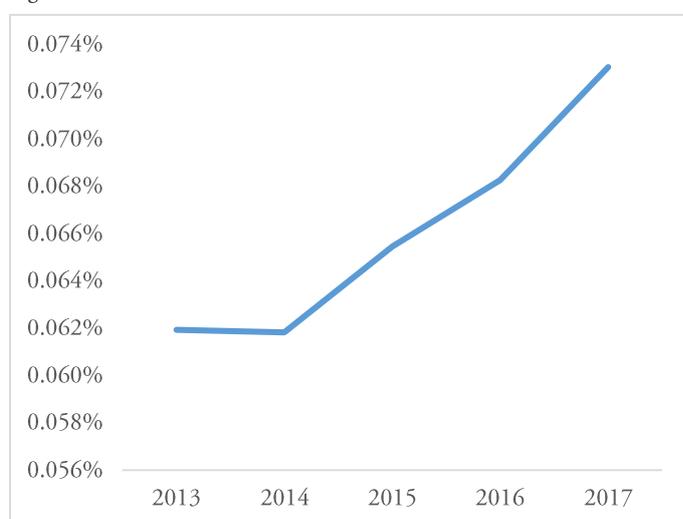
Figure 6: EPD Matrix of Pakistan's Exports to Canada



As evident from the EPD matrix, **HS 300490 Medicaments consisting of mixed or unmixed products for therapeutic or prophylactic purposes** lie in the “Lost Opportunity” segment. This indicates that there lies potential for **Medicaments** to move up in the “Rising Star” segment. Canada’s imports of **HS 300490 Medicaments** have averaged USD 6bn over the past 3 years whereas Pakistan’s exports to the Canadian market have averaged USD 0.6mn over the corresponding time period.

Exports which seemingly perform high in the Canadian market, such as **HS 620342 Men’s trousers and shorts of cotton**, **HS 390769 PET resin**, **HS 420329 leather gloves**, **HS 620462 Women’s trousers and shorts of cotton** etc are “Falling Stars” due to the fact that Canada’s imports from the world for said items is very low.

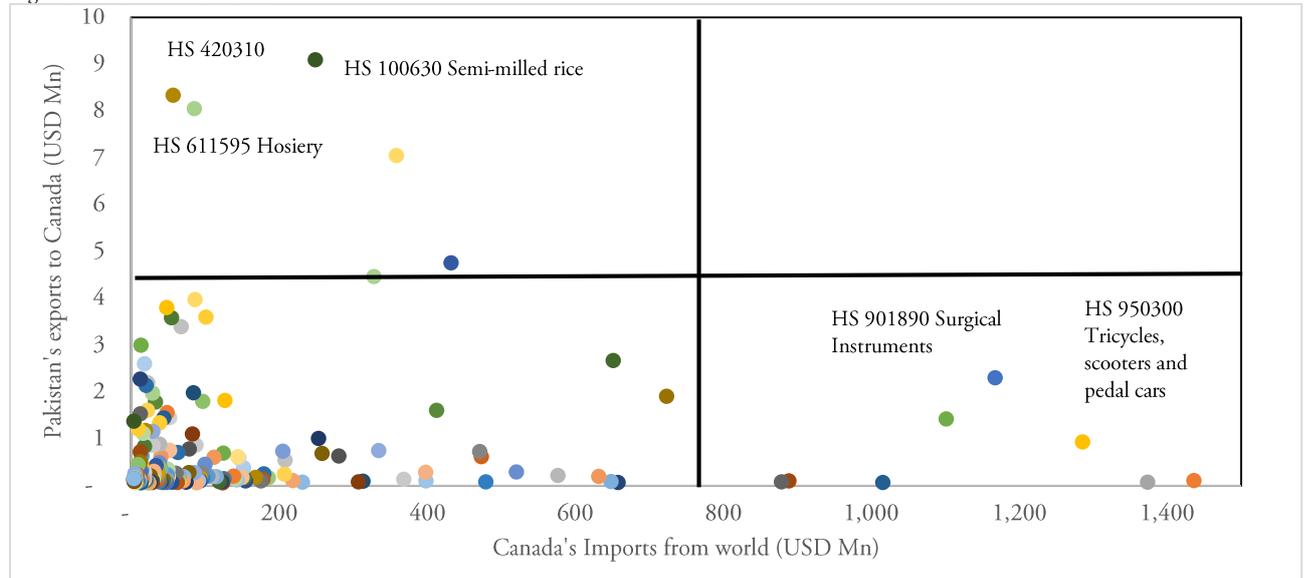
Figure 7: Pakistan's Market Share in Canada



The majority of Pakistan’s exports fall in Canada’s “Retreat” category which explains Pakistan’s stagnant market share in Canada for the past 5 years between 0.06% and 0.075%. Product wise market share details are discussed in Appendix 1. Further analysis of the EPD matrix reveals that, for the purposes of our analysis, if we focused on the concentrated cluster of Pakistan’s exports to Canada and treated **HS 300490 Medicaments** and other outstanding data points as outliers, we

can construct another EPD matrix which further zooms in on the concentrated cluster of Pakistan's exports.

Figure 8: Further EPD Matrix



Further analysis indicates that items such as **HS 950300 Tricycles, scooters and pedal cars**, **HS 901890 Surgical Instruments**, **HS 190590 Bread, cakes and pastries** and **HS 210690 Food preparations** also come under the “Lost Opportunity” segment. Therefore, exporters should make efforts to increase market share of these products in the Canadian market to push them up to the “Rising Stars” segment.

Items such as **HS 100630 semi-milled or wholly milled rice**, **HS 420310 leather articles**, **HS 611595 full length or knee length stockings** fall in the “Falling Stars” category indicating that while exports of such products are high, Canada imports of these items is low. The majority of Pakistan's exports still fall in the “Retreat” segment.

## POTENTIAL ITEMS

Using the EPD matrix, the following items were identified as having potential to increase Pakistan's exports as they have high demand in Canada and Canada's imports of these items from the world are well over USD 100mn.

1. HS 300490 Medicaments consisting of mixed or unmixed products for therapeutic or prophylactic purposes.
2. HS 901890 Instruments and appliances used in medical, surgical or veterinary sciences, n.e.s.
3. HS 610330 Jerseys, pullovers, cardigans, waistcoats and similar articles, of man-made fibers.
4. HS 711319 Articles of jewelry and parts thereof, of precious metal other than silver.
5. HS 210690 Food preparations n.e.s.

### HS 300490 Medicaments

#### Market Share & ECI

Among Pakistan's export basket to Canada, **Medicaments** scored the highest in terms of Canada's imports of the item from the rest of the world as shown in Figure 6 earlier. Canada's total import market size of medicaments for therapeutic or prophylactic is approximately USD 6bn. Pakistan's market share of **HS 300490 Medicaments** imported in Canada is 0.02% of the USD 6bn market indicating an opportunity for Pakistani exporters to capitalize and capture further market share.

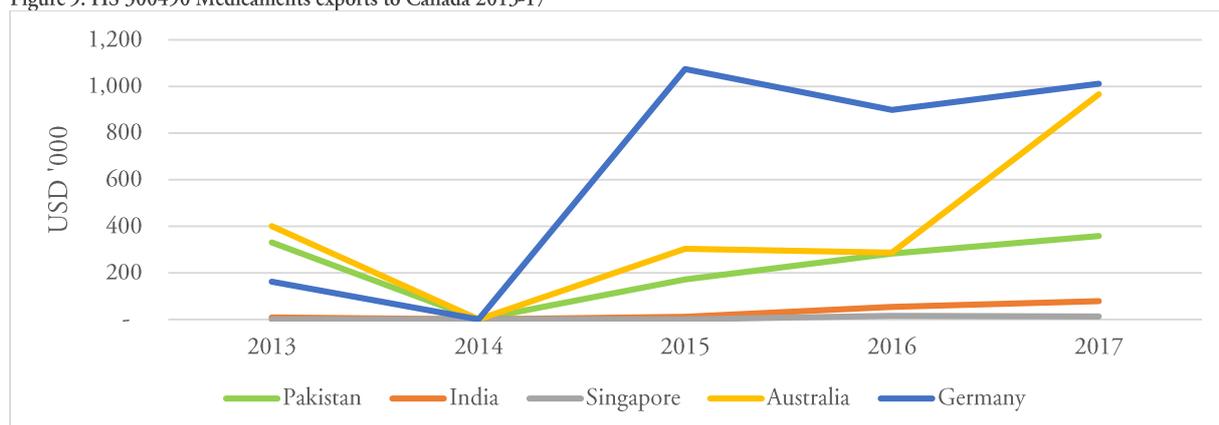
**HS 300490** covers a variety of medicaments therefore a further in-depth research into the product umbrella reveals that Pakistan mostly exports cough medication to Canada, amounting to USD 0.3mn in 2017. The Export Competitiveness Index (ECI) reveals that Pakistan's export competitiveness of medicaments to the Canadian market has decreased over the past 5 years.

Table 1: Export Competitiveness Index for HS 300490 Medicaments

	Canada Imports from Countries (USD Mn)		ECI		Rank		Market Share	
	2013	2017	2013	2017	2013	2017	2013	2017
United States of America	31.25	22.06	0.571	0.539	2	2	70.2%	48.2%
Switzerland	5.55	7.30	0.589	0.665	1	1	12.47%	16.0%
Italy	-	5.90	-	0.190	21	3	0%	12.89%
United Kingdom	1.35	1.84	0.037	0.058	7	8	3%	4.03%
Germany	0.16	1.01	0.004	0.030	13	10	0%	2.21%
Australia	0.40	0.97	0.019	0.044	9	9	1%	2.11%
Pakistan	0.33	0.36	0.007	0.009	11	11	1%	0.78%
India	0.01	0.08	0.000	0.002	18	14	0%	0.17%
Singapore	-	0.01	-	0.002	21	15	0%	0.03%

Pakistan's market share of **medicaments**, specifically cough syrup, in Canada's imports is 0.8%. Italy and Singapore, while having 0% market share in 2013, realized the potential of cough syrup medication exports to Canada and consequently made moves to increase their market shares to 13% and 0.03% respectively. As a result of this, Italy now stands as one of the market leaders in Canada's cough medication market. India has also increased their market share substantially from 0.02% in 2013 to 0.2% in 2017.

Figure 9: HS 300490 Medicaments exports to Canada 2013-17



### What has worked for Australia?

Australia is Canada's 20<sup>th</sup> largest trading partner as a result of 1960 Trade Agreement between Canada and Australia. A further Trade and Economic Cooperation Agreement in 1995 further strengthened the trade potential between the two countries. Commercial relations between the two countries are robust and varied. Bilateral trade between the two countries amounted to USD 3bn. Direct investment between the two countries is high with Canadian investment in Australia amounting to USD 27.8mn and Australian investment in Canada amounting to USD 11.5bn. In the field of medicaments, Australia's supply to Canada increased from USD 400,000 in 2013 to USD 1mn in 2017. Increase in the use of e-commerce solutions has helped enhance Australia's exports of medicaments. Australian manufacturers use well-designed websites to market their products. They also sell their products via Amazon and eBay.

### Edge for Singapore

Singapore's supply of medicaments to Canada increased from nil in 2013 to USD 0.01mn in 2017. While lower than Pakistan's supply, Singapore has made substantial increases in its exports of medicaments to Canada. Singapore's total exports of HS 300490 Medicaments amounts to USD 3.8bn. Singapore houses several large pharma MNCs such as GSK, 3M and Pfizer. The standards of both medicaments and pharmaceuticals is high in Singapore as the Ministry of Health ensures compliance with regulations and international standards. While this leads to a higher AUP for Singapore, their exporters position their brands as high quality products.

Table 2: Additional Information for Export of HS 300490 Medicaments

Additional Information		
Pakistan	Australia	Singapore
<b>Distance (km)</b>		
16,738	26,643	20,736
<b>AUP (USD/Ton)</b>		
17,921	45,700	192,667
<b>Non-tariff requirements</b>		
107	107	107

## Importers Database

The top importers of **HS 300490 Medicaments** are exhibited in the list below for exporters' convenience:

Table 3: Canada's Top Importers for HS 300490 Medicaments

HS 300490 Medicaments Nes - In Dosage			
Number of companies:	26		
Company name	City	Province	Postal code
ALCON CANADA INC.	Mississauga	Ontario	L5N 8C7
ALLERGAN INC.	Unionville	Ontario	L6G 0B5
AMGEN CANADA INC	Mississauga	Ontario	L5N 7Y2
ASTELLAS US TECHNOLOGIES, INC.	Northbrook	Illinois	
ASTRAZENECA CANADA INC.	Mississauga	Ontario	L4Y 1M4
BAYER INC	Mississauga	Ontario	L4W 5R6
BIOGEN IDEC U.S. CORPORATION	Cambridge	Massachusetts	
BOEHRINGER INGELHEIM CANADA LTD.	Burlington	Ontario	L7L 5H4
BRISTOL-MYERS SQUIBB CANADA CO./LA SOCIETE BRISTOL-MYERS SQU	Candiac	Quebec	J5R 1J1
CELGENE LOGISTICS SARL	2017 - Boudry		
ELI LILLY CANADA INC	Toronto	Ontario	M1N 2E8
GLAXO WELLCOME	Mississauga	Ontario	L5N 6L4
HOSPIRA HEALTHCARE CORPORATION CORPORATION DE SOINS DE LA SA	Saint-Laurent	Quebec	H4S 0A9
JANSSEN INC.	Toronto	Ontario	M3C 1L9
MERCK CANADA INC.	Kirkland	Quebec	H9H 4M7
MYLAN PHARMACEUTICALS ULC	Toronto	Ontario	M8Z 2S6
NOVARTIS PHARMACEUTICALS CANADA INC / NOVARTIS PHARMA CANADA	Dorval	Quebec	H9S 1A9
PALADIN LABS INC.	Dorval	Quebec	H9P 2W7
PFIZER CANADA INC.	Kirkland	Quebec	H9J 2M5
PHARMACEUTICALS & CHEMICALS DIV OF HOFFMANN-LA ROCHE LIMITED	Mississauga	Ontario	L5N 5M8
SANDOZ CANADA INC.	Boucherville	Quebec	J4B 7K8
SANOFI - AVENTIS CANADA INC.	Kirkland	Quebec	H9J 3A3
SERVIER CANADA INC.	Laval	Quebec	H7V 4A7
TAKEDA CANADA INC.	Oakville	Ontario	L6M 4X8
TEVA CANADA LIMITED / TEVA CANADA LIMITEE	Toronto	Ontario	M1B 2K9
VIIV HEALTHCARE ULC	Calgary	Alberta	T2P 4J8

(Government of Canada, 2018)

## Tariff requirements

Tariff for **HS 300490** is 0%. Appendix 2 gives details of applicable tariffs and preferential tariffs for various trade agreements Canada has with other countries and trade blocs.

## Non-tariff requirements

There are a total of 112 non-tariff requirements in relation to HS 300490. Their details are provided in Table 4.

Table 4: Non-tariff measures for HS 300490 Medicaments

UNCTAD, TRAINS NTMs database through Integrated Trade Intelligence Portal (I-TIP)				
112 measures				
Measures :	Sanitary and Phytosanitary [SPS] [A], Technical Barriers to Trade [TBT] [B], Pre-shipment inspection [INSP] [C], Contingent trade protective measures [CTPM] [D], Quantity control measures [QC] [E], Price control measures [PC] [F], Other measures [OTH] [G,H,I,J,K,L,M,N,O], Export-related measures [EXP] [P]			
Country imposing:	Canada			
Product	HS codes: 300490			
Country imposing	Partner affected	Requirements	Phase	Measures
Canada	All Members	Export-related measures	In force	5
Canada	All Members	Pre-shipment inspection	In force	1
Canada	All Members	Price control measures	In force	3
Canada	All Members	Sanitary and Phytosanitary	In force	9
Canada	All Members	Technical Barriers to Trade	In force	92
Canada	Bilateral	Export-related measures	In force	2

## HS 901890 Surgical Instruments

### Market Share & ECI

The market size for **surgical instruments** in Canada is USD 1.2bn. Pakistan's exports of **surgical instruments** amounted to USD 2.5mn in 2017 representing a market share of 0.21%.

Analysis of ECI reveals Pakistan's ranking is 39<sup>th</sup> amongst various suppliers of **surgical instruments** to Canada. Competition is high among supply of surgical instruments due to the lucrative nature of the market. Pakistan's exports of surgical instruments to Canada increased by 11% over the past 5 years. The greatest increase in supply of surgical instruments was witnessed by Serbia, Vietnam and Thailand, at 1736%, 341% and 102% respectively, due to increase in FDI in surgical instruments' sector in the aforementioned countries.

Pakistan and India witnessed slower growth in supply of surgical instruments as compared to Thailand, Vietnam and Malaysia due to lack of trade agreements and foreign companies' investment.

Table 5: Export Competitiveness Index for HS 901890 Surgical Instruments

	Canada Imports from Countries (USD)		ECI		Rank		Market Share	
	2013	2017	2013	2017	2013	2017	2013	2017
United States of America	620.38	604.52	0.614	0.602	1 →	1	53.2%	49.9%
China	42.26	43.01	0.036	0.037	14 ↑	12	3.6%	3.6%
Singapore	23.90	9.48	0.277	0.101	5 ↓	10	2.051%	0.783%
Viet Nam	1.12	4.93	0.002	0.007	37 ↑	32	0.096%	0.407%
Malaysia	1.67	2.77	0.005	0.007	32 ↑	31	0.143%	0.229%
Pakistan	2.19	2.44	0.002	0.003	34 ↓	39	0.188%	0.201%
Thailand	0.80	1.63	0.001	0.003	38 ↓	40	0.069%	0.134%
Australia	0.73	1.03	0.002	0.003	35 ↓	38	0.062%	0.085%

Most of the market share is captured by countries which have free trade agreements with Canada such as USA, Mexico, Costa Rica, European Union members, Chile, Peru, Colombia and South Korea. There exists a strong correlation between Canada's trading partners and trade agreements indicating that countries which have trade agreements in place with Canada enjoy a greater percentage of market share. Due to this reason, several countries and trade blocs are currently negotiating FTAs with Canada including:

- CARICOM
- Dominican Republic
- Guatemala, Nicaragua, El Salvador
- India
- CPTPP (including Australia, Brunei, Malaysia, New Zealand, Vietnam)
- Japan
- Morocco
- Singapore

Appendix 3 lists the countries and trade blocs that have signed FTAs with Canada.

Figure 10: HS 901890 Surgical Instruments exports to Canada 2013-17

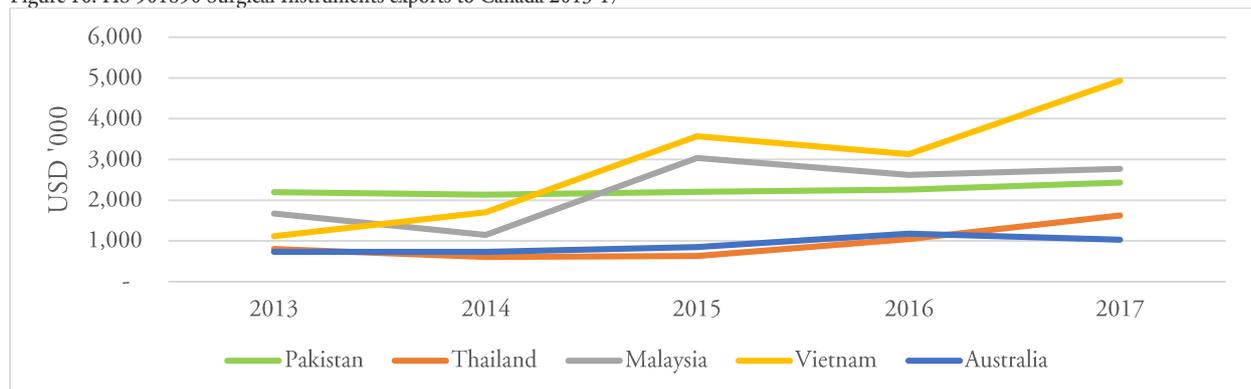
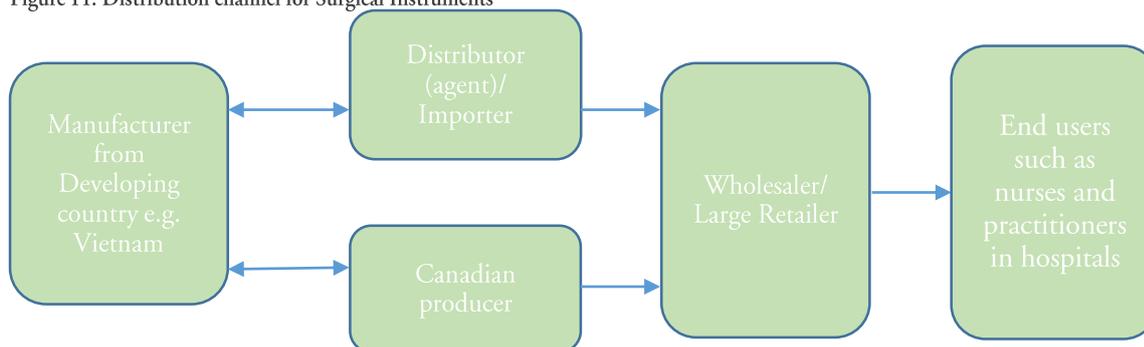


Figure 10 above shows the growth in supply of surgical instruments to Canada over the past 5 years by various countries including Pakistan. Vietnam and Thailand showed exponential growth over the past 5 years while growth of Malaysia and Australia tapered off over the corresponding period.

### What has worked for Vietnam?

Foreign Direct Investment in the Vietnamese manufacturing sector has played an important part in raising the standard of Vietnamese items and enhancing their exports. Total FDI in Vietnam is USD 300bn. 58% of FDI goes to processing and manufacturing industries (Voice of Vietnam, 2018). The influx of FDI has resulted in advancements in manufacturing of Vietnamese products including surgical instruments. Vietnamese manufacturers have also benefitted from well established distribution channels. A typical Vietnamese distribution channel employs a distributor agent at the destination country like Canada or exports directly to the wholesale retailer within the country. Figure 6 shows a typical distribution channel for Vietnamese surgical instruments supplied to Canada. A typical manufacturer from Vietnam makes items either for a Canadian producer who hands the third party contract to Vietnamese manufacturers or passes them on to a distributor in Canada. The distributor or Canadian producer forward sells to a wholesaler or large retailer in the country. The wholesaler or large retailer supplies to end users such as hospitals.

Figure 11: Distribution channel for Surgical Instruments



### What has worked for Thailand?

In 2004, Thailand announced its strategy to become the Medical Hub of Asia (Thailand Board of Investment, 2016). In line with the announced strategy, Thailand's Board of Investment began their one window strategy to welcome FDI in the medical sector. Thailand is the second largest healthcare market in southeast Asia after Indonesia. FDI in the Thai medical sector amounted to USD 122mn. Cost effective production led to many major international manufacturers locating their plants in Thailand. As a result of this, Thailand now houses several large brand names in medical instruments manufacture such as Bausch & Lomb, Baxter Healthcare, Boston Scientific, Carl Zeiss, Johnson & Johnson, Roche and Siemens Surgical Instruments. Thailand's major exports are low tech, single use devices such as syringes, catheters, tubes, cannulae, gloves etc. they have also branched out into auxiliary services such as pharmaceuticals and medical foods etc and have started to offer them as bundles together with surgical instrument thereby increasing the overall exports of both surgical instruments and pharmaceuticals. The package deals that are offered using this strategy is attractive to hospitals as they are able to procure both items from a singular source with less hassle. Thailand has also made sure that its 7 laws relating to Intellectual Property Rights meet international standards. Their Medical Device Control Division issues licenses to surgical instrument manufacturers thereby ensuring quality equipment for interested buyers. The Medical Device Control Division also sees that the standards set by the Thai Industrial Standards Institute are met.

### What has worked for Australia?

Australia has been able to increase its exports of surgical instruments to Canada by making the most of e-commerce utilities. Several Australian manufacturers such as Jensen Instruments, Trewavis Surgical Online International, LR Instruments, Taylor Surgical Instruments, Matrix Surgical and many more have established websites for interested buyers to view and contact. This has resulted in cost savings from other expenditure areas such as trade exhibitions which can prove to be expensive including costs such as transportation, space booking costs and accommodation etc. Adoption of e-commerce solutions results in savings for exporters. A study by National Bureau of Economic Research found that Australia and China focused on lower quality exports as compared to European exporters (Baldwin, 2008).

## What has worked for Malaysia?

In 2016, the Malaysian government injected USD 5.2bn in the healthcare sector and FDI influx in the medical sector amounted to USD 1.6bn. The increase in healthcare and medical spending has resulted in increase in Malaysia's export quality over the years. A total of 30 multinational companies operate in Malaysia in the surgical instruments sector including Agilent, Braun, St. Jude Medical, C.R. Bard, Toshiba Medical and several others. The presence of big brand names among the surgical instruments manufacturers has led to increase in Malaysia's exports of HS 901890 surgical instruments as many of these MNCs have their own setups in Canada and outsource manufacture to Malaysia due to the low costs. Exporters from Malaysia have a targeted product basket that includes gloves, catheters, syringes, needles, sutures, electro-medical equipment and ophthalmic lenses.

Table 6: Additional Information for export of HS 901890

Additional Information				
Pakistan	Vietnam	Thailand	Malaysia	Australia
Distance (km)				
16,700	22,300	22,300	20,400	13,400
Non-tariff requirements				
15	15	15	15	15

## Importers Database

The top importers of HS 901890 Surgical Instruments are given below for exporters' convenience:

Table 7: Canada's Top Importers for HS 901890 Surgical Instruments

901890 Instruments And Appliances Used In Medical, Surgical Or Veterinary Sciences Nes (Incl Parts)			
Number of companies:	60		
Company name	City	Province	Postal code
3M CANADA COMPANY-COMPAGNIE 3M CANADA	London	Ontario	N5V 4M9
ABBOTT LABORATORIES, LIMITED	Saint-Laurent	Quebec	H4S 1R3
ALCON CANADA INC.	Mississauga	Ontario	L5N 8C7
ALMA LASERS, INC.	Buffalo Grove	Illinois	
AMT ELECTROSURGERY INC.	Kitchener	Ontario	N2E 2C3
ARTHREX, INC.	Naples	Florida	
BARD CANADA INC	Oakville	Ontario	L6H 6X5
BAXTER CORPORATION	Mississauga	Ontario	L5N 0C2
BECTON DICKINSON CANADA INC./BECTON DICKINSON CANADA INC.	Mississauga	Ontario	L5N 0B3
BELLCO CANADA INC.	Mississauga	Ontario	L5N 7X9
BOSTON SCIENTIFIC LTD./ BOSTON SCIENTIFIQUE LTEE.	Mississauga	Ontario	L5T 1W8
CANADIAN HOSPITAL SPECIALTIES LIMITED	Oakville	Ontario	L6H 6R1
CARDINAL HEALTH CANADA INC.	Concord	Ontario	L4K 5R8
CAREFUSION CANADA 307 ULC	Mississauga	Ontario	L4W 5S7
CHIEF MEDICAL SUPPLIES LTD	Calgary	Alberta	T2E 6J7
CLARION MEDICAL TECHNOLOGIES INC.	Cambridge	Ontario	N1T 2B8
COVIDIEN CANADA ULC	Saint-Laurent	Quebec	H4S 1Z1
CRYOCATH TECHNOLOGIES	Kirkland	Quebec	H9H 5H3
CUTERA, INC.	Brisbane	California	
CYNOSURE, INC.	Westford	Massachusetts	
DRAEGER MEDICAL CANADA INC.	Mississauga	Ontario	L4W 4Y6
E-Z-EM CANADA INC.	Anjou	Quebec	H1J 2M9
FRESENIUS MEDICAL CARE CANADA, INC.	Richmond Hill	Ontario	L4B 4W6
GENERAL ELECTRIC CANADA	Mississauga	Ontario	L5N 5P9
HEALTHMARK SERVICES LTD. LES SERVICES HEALTHMARK LTEE	Saint-Laurent	Quebec	H4S 1P7
HENRY SCHEIN CANADA, INC.	Niagara On The Lake	Ontario	L0S 1J0
HOLOGIC CANADA LIMITED	Toronto	Ontario	M5V 2L4
INSULET CANADA CORPORATION	Billerica		

INTEGRA CANADA ULC	Burlington	Ontario	L7L 5Y7
JOHNSON & JOHNSON INC.	Saint-Laurent	Quebec	H4S 1Z6
KARL STORZ ENDOSCOPY CANADA LTD	Mississauga	Ontario	L5N 3R3
KCI MEDICAL CANADA INC./FOURNITURES MEDICALES KCI DU CANADA	Mississauga	Ontario	L5W 0E3
LINVATEC CANADA ULC	Mississauga	Ontario	L5N 1W2
MAQUET-DYNAMED INC.	Markham	Ontario	L3R 8V2
MEDELA CANADA INC	Mississauga	Ontario	L5L 0A1
MEDLINE CANADA, CORPORATION	Toronto	Ontario	M5J 2J7
MEDTRONIC OF CANADA LTD./MEDTRONIC DU CANADA LTEE	Brampton	Ontario	L6Y 0R3
MINOGUE MEDICAL INC	Montréal	Quebec	H3C 2G7
MITROFLOW DIVISION	Burnaby	British Columbia	V5J 5M1
NOVADAQ TECHNOLOGIES INC.	Mississauga	Ontario	L4W 4T9
OLYMPUS CANADA INC.	Richmond Hill	Ontario	L4B 4B3
OPTOS CANADA INC	Marlborough	Massachusetts	
PHILIPS ELECTRONICS LTD/ST JEROME QUEBEC	Markham	Ontario	L6C 2S3
PHYSIO-CONTROL CANADA SALES LTD.	Mississauga	Ontario	L5N 8C3
PRO-MEDIX	Brampton	Ontario	L7A 0N8
RYAN MEDICAL DISTRIBUTORS INC	Burlington	Ontario	L7L 6B8
SMITH & NEPHEW INC.	Memphis	Tennessee	
SMITHS MEDICAL CANADA LTD.	Markham	Ontario	L3R 4Y8
SOUTHMEDIC INCORPORATED	Barrie	Ontario	L4M 5K3
STRYKER CANADA HOLDING COMPANY	Dundas	Ontario	L9H 7L8
SYNERON CANADA CORPORATION	Mississauga	Ontario	L5T 2J4
TELEFLEX MEDICAL CANADA INC.	Markham	Ontario	L3R 9Z3
TERUMO BCT CANADA INC.	Mississauga	Ontario	L4Z 1S1
TREASURY DEPT GOV'T OF ALBERTA	Edmonton	Alberta	T6N 1E4
TRUDELL MEDICAL MARKETING LIMITED	London	Ontario	N5V 5J7
VANTAGE ENDOSCOPY INC.	Kitchener	Ontario	N2E 2C3
WELCH ALLYN CANADA LIMITED	Mississauga	Ontario	L4Z 1V4
ZELTIQ AESTHETICS, INC.	Pleasanton	California	
ZIMMER BIOMET CANADA INC.	Toronto	Ontario	M5K 0A1
ZOLL MEDICAL CANADA INC	Mississauga	Ontario	L4Z 3E6

(Government of Canada, 2018)

## Tariffs

Tariffs for HS 901890 Surgical Instruments is 0%.

## Non-tariff requirements

There are a total of 18 non-tariff requirements in relation to HS 901890 surgical instruments. Their details are provided in the table below.

Table 8: Non-tariff measures for HS 901890 Surgical Instruments

UNCTAD, TRAINS NTMs database through Integrated Trade Intelligence Portal (I-TIP)				
18 measures				
Measures:	Sanitary and Phytosanitary [SPS] [A], Technical Barriers to Trade [TBT] [B], Pre-shipment inspection [INSP] [C], Contingent trade protective measures [CTPM] [D], Quantity control measures [QC] [E], Price control measures [PC] [F], Other measures [OTH] [G,H,I,J,K,L,M,N,O], Export-related measures [EXP] [P]			
Country imposing:	Canada			
Product(s):	HS codes: 901890			
Country imposing	Partner affected	Requirements	Phase	Measures
Canada	All Members	Export-related measures	In force	1
Canada	All Members	Pre-shipment inspection	In force	1
Canada	All Members	Price control measures	In force	2
Canada	All Members	Technical Barriers to Trade	In force	11
Canada	Bilateral	Export-related measures	In force	3

## HS 611030 Jerseys, Pullover, Cardigans of Man-Made Fibers

### Market Share & ECI

Canada's market size for **HS 611030 Jerseys, Pullover etc. of MMF** is USD 672mn. Pakistan's exports of products under this HS category are worth USD 2.7mn indicating a market share of 0.41%.

Analysis of ECI reveals Pakistan's ranking to be 22<sup>nd</sup> in the Canadian market. Pakistan's ranking improved from 27<sup>th</sup> in 2013 to 22<sup>nd</sup> in 2017 indicating a marked improvement in the use of MMF for textile products in line with global demands. Pakistan's market share increased by 305% over the past 5 years.

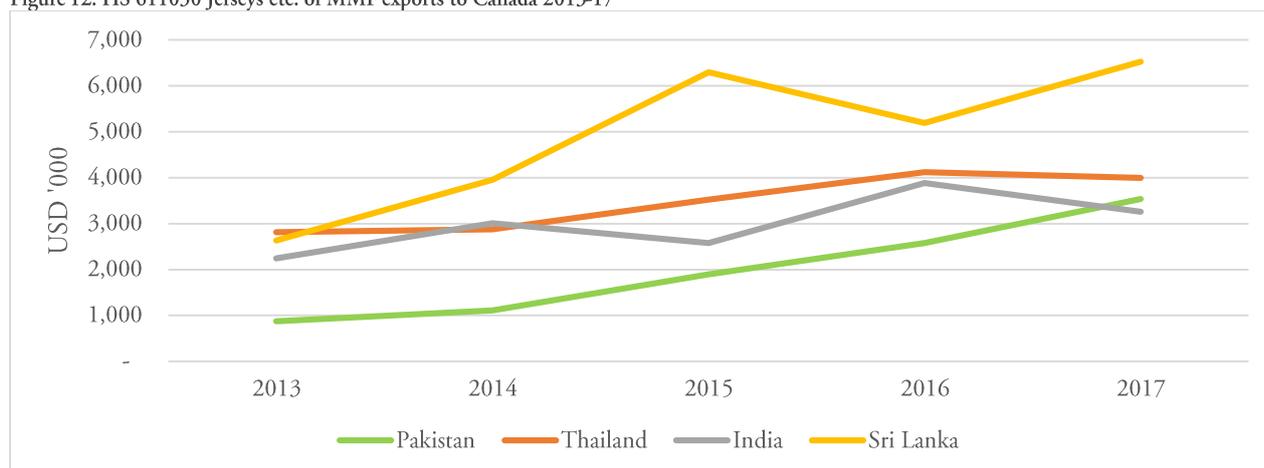
Bangladesh, Cambodia, China and Vietnam maintained their rankings over the past 5 years. Exports of Cambodia, Bangladesh, Jordan and Indonesia also grew substantially over the corresponding period.

Table 9: Export Competitiveness Index for HS 611030 Jerseys, Pullover, Cardigans of MMF

	Canada Imports from Countries (USD Mn)		ECI		Rank	
	2013	2017	2013	2017	2013	2017
China	332.06	283.68	0.533	0.517	2 →	2
Cambodia	56.57	93.62	0.585	0.664	1 →	1
Bangladesh	47.37	69.76	0.112	0.158	5 →	5
Viet Nam	27.22	43.61	0.081	0.115	6 →	6
Indonesia	17.13	24.61	0.035	0.050	10 ↑	8
Jordan	9.04	22.73	0.198	0.311	4 ↑	3
Turkey	8.11	8.41	0.026	0.022	12 ↓	15
Italy	5.62	7.29	0.021	0.021	15 ↓	16
Sri Lanka	2.63	6.53	0.021	0.036	14 ↑	12
Thailand	2.81	3.99	0.010	0.010	20 →	20
Pakistan	0.87	3.54	0.002	0.006	27 ↑	22
India	2.24	3.26	0.004	0.004	24 ↓	26

Pakistan's exports of **MMF jerseys and cardigans** have increased exponentially over the past 5 years, however countries such as Cambodia, Bangladesh and Vietnam remain at the top due to their early adopters' strategy meanwhile Pakistan remains a laggard. Pakistan also has lower use of cotton to MMF mix in their textiles at 70:30 ratio meanwhile countries such as Bangladesh use cotton to MMF mix in 60:40 ratio.

Figure 12: HS 611030 Jerseys etc. of MMF exports to Canada 2013-17



Pakistan's exports of **MMF jerseys and cardigans** rose steadily from under USD 1mn in 2013 to USD 3.5mn in 2017 indicating a marked improvement in exports to the Canadian market. In 2017, Pakistan overtook India in exports of MMF Jerseys and cardigans to Canada. However, Pakistan still lags behind Thailand and Sri Lanka.

### Bangladesh's strategy

Bangladesh has a number of advantages working in their favor that lead to an increase exports to Canada. Their lower electricity tariffs provide an incentive for lower production costs. The electricity tariff for Bangladesh is approximately 7.3 cents per kilowatt hour versus Pakistan's 11 cents per kilowatt hour. Bangladesh also has lower gas tariffs at \$3 per MMBTU compared to Pakistan's \$8 per MMBTU. In order to boost exports, Bangladesh also made considerable investments in both backward linkages such as electricity, gas, machinery, spare parts supply and forward linkages such as transport, communications, banking, insurance and trade services. Around 1000 to 1500 overseas apparel buyers visit Bangladesh every year. Foreign buyers also prefer the political stability offered by Bangladesh as compared to Pakistan. Political stability is seen as an important factor for customers when handing out contracts. Shifting regional economics are also a factor; China's focus changing to higher added value products leave space for countries like Bangladesh in terms of production of MMF fabrics.

### What has worked for Vietnam?

Vietnam's low labor costs play a part in keeping production costs low for its exports. Appendix 4 depicts the costs of textile production for several countries. Vietnam's exchange rate spurs customers in handing contracts to Vietnamese manufacturers. 1 USD is equivalent to 23,268 Vietnamese dong. Traditionally a silk products manufacturer, Vietnam has made several strides in becoming a market leader in export of cotton and MMF fabrics. The speedy adaptability of Vietnamese manufacturers in adopting to changing market demands has helped immensely in increasing exports. Vietnam has shifted focus towards value added products with investments in fiber spinning, shuttle weaving and circular knitting. Vietnam has also optimized lead times. Locally sourced raw materials are sourced in 60 days while imported raw materials are sourced

within 30 to 35 days. The country also has zero duty on import of machinery and equipment for textiles and garments.

### What has worked for Cambodia?

Cambodia's has been steadily diversifying its export destinations leading to a rise in exports in the Canadian market since 2000. In 2000, Cambodia used to export 76 percent of its apparel goods to the US. However, over the years, Cambodia has managed to expand its market. Cambodia has also been able to benefit from Least Developed Country (LDC) status thereby enabling them to get beneficial tariff rates and preferential market access. Majority of Cambodia's apparel plants are foreign owned, therefore the primary factor behind Cambodia's increase in exports of jerseys, pullovers and cardigans off MMF has been the increase in FDI in this sector.

### What has worked for Sri Lanka?

Sri Lanka's supply of HS 611030 jerseys, pullovers etc. of MMF to Canada amounted to USD 6.5mn in 2017. Sri Lanka has a prestigious customer base established for RMG with international brands such as Tommy Hilfiger, Victoria's Secret, Marks and Spencer, Liz Clairborne, GAP, Abercrombie and Fitch. Sri Lanka also regularly invites foreigners to visit their country, for both business and tourism, which enables potential business ties to develop. The industry has been successful in establishing itself as a reliable manufacturer of quality RMGs with competitive pricing. The apparel industry of Sri Lanka aims to be the best supplier of clothing, with regards to quality, pricing and speed as well as logistics, execution, design and innovation, and compliance with ethical standards (Kelegama, 2009).

Table 10: Additional Information for export of HS 611030 Jerseys etc. of MMF

Additional Information				
Pakistan	Vietnam	Bangladesh	Sri Lanka	Cambodia
<b>Distance (km)</b>				
16,700	22,300	20,000	17,900	21,900
<b>AUP (USD per Ton)</b>				
26,602	26,626	26,635	26,633	26,635
<b>Non-tariff requirements</b>				
15	15	15	15	15

### Importers database

The entire details of Canada's top importers for **HS 611030 Jerseys, Cardigans, pullovers etc of MMF** have been provided below for exporters' convenience:

Table 11: Canada's Top Importers for HS 611030 Jerseys, Pullovers, Cardigans of MMF

611030 Sweaters, Sweatshirts And Waist-Coats - Knitted - Man-Made Fibres			
Major Canadian Importers in 2016			
Number of companies:	108		
Company name	City	Province	Postal code
#1 APPAREL	Saint-Hyacinthe	Quebec	J2S 1H3
ACCOLADE GROUP INC	Richmond Hill	Ontario	L4B 1G5
ADIDAS CANADA LIMITED	Concord	Ontario	L4K 5B2
AFH CANADA STORES CO.	New Albany	Ohio	

AMERICAN APPAREL CANADA WHOLESALE INC./AMERICAN APPAREL CANA	Montréal	Quebec	H3A 1X6
AMERICAN EAGLE OUTFITTERS CANADA CORPORATION/CORPORATION DE	Mississauga	Ontario	L5W 1Y6
ANN CANADA INC.	Toronto	Ontario	M5X 1B8
ARC TERYX EQUIPMENT, A DIVISION OF AMER SPORTS CANADA INC.	North Vancouver	British Columbia	V7H 1A8
ARITZIA LP	Vancouver	British Columbia	V6A 1E1
ARLIE'S SPORT SHOP DOWNTOWNLTD.	St Catharines	Ontario	L2M 6K4
ASH CITY	Richmond Hill	Ontario	L4B 0B4
BASS PRO SHOPS CANADA ULC	Concord	Ontario	L4K 5W4
BESTSELLER WHOLESALE CANADA INC. / BESTSELLER VENTES EN GROS	Montréal	Quebec	H2P 1H4
BOOTLEGGERS	Vancouver	British Columbia	V6B 4N8
BOUTIQUE MARIE CLAIRE INC	Anjou	Quebec	H1J 1K6
CARHARTT INC	Dearborn	Michigan	
CHICO'S FAS CANADA, CO.	Halifax	Nova Scotia	B3J 2X2
CLEO	Vancouver	British Columbia	V6C 0A3
COALISION INC.	Montréal	Quebec	H2Y 1A6
COBMEX APPAREL INC.	Markham	Ontario	L3R 1B5
COLUMBIA SPORTSWEAR CANADA LP	London	Ontario	N6N 0A2
COSTCO WHOLESALE CANADA LTD	Ottawa	Ontario	K2E 1C5
DEX BROS CLOTHING CO LTD DEX BROS CIE DE VETEMENTS LTEE	Saint-Laurent	Quebec	H4N 1V8
ECLIPSE STORES INC.	St. John's	Newfoundland and Labrador	A1C 5W8
EDDIE BAUER OF CANADA CORPORATION	Woodbridge	Ontario	L4L 9C1
ELMAU & ASSOCIATES TRADING COLTD	Montréal	Quebec	H3L 3J4
ES SPORTS INC	Montréal	Quebec	H2N 2H8
EXPRESS FASHION APPAREL CANADA INC.	Toronto	Ontario	M5L 1B9
FIELDS STOREA DIV. OF HUDSONS BAY	Toronto	Ontario	M5H 2Y4
FOREVER XXI ULC	Los Angeles	California	
FREEMARK APPAREL BRANDS INC.	Mont-Royal	Quebec	H4P 2M1
FRUIT OF THE LOOM CANADA, INC.	Trois-Rivières	Quebec	G9A 5E1
FUTURE DESIGN	Dhaka Bangladesh 1230		
G-III APPAREL CANADA ULC	Richmond	British Columbia	V6V 2L1
G.T. WHOLESALE LIMITED	Ottawa	Ontario	K1G 6A9
GAP CANADA INC.	Toronto	Ontario	M5S 1T9
GBG DENIM CANADA ULC	Vancouver	British Columbia	V6C 3R8
GROUPE DYNAMITE INC.	Mont-Royal	Quebec	H4P 1M2
GUESS? CANADA CORPORATION/CORPORATION GUESS? CANADA	Montréal	Quebec	H1Z 4K2
H & M HENNES & MAURITZ GBC AB	Se-106 38 Stockholm		
H&M HENNES & MAURITZ INC.	Toronto	Ontario	M5G 1Z3
HADDAD APPAREL GROUP CANADA INC. / GROUPE DE VETEMENTS HADDA	Montréal	Quebec	H2N 1M5
HAGGAR CANADA CO.	Toronto	Ontario	M3J 2M9
HANESBRANDS EXPORT CANADA LLC	Saint-Léonard	Quebec	H1R 1Z4
HANESBRANDS INC.	Winston-Salem	North Carolina	
HIGH LIFE LLC	New York	New York	
HOT TOPIC CANADA INC.	Toronto	Ontario	M4W 1Z4
IDEAL TEXTILES G.P. LES TEXTILES IDEAL S.E.N.C.	Montréal	Quebec	H2N 1Y6
INA INTERNATIONAL LTD.	Calgary	Alberta	T2E 3R3
ITX CANADA INC.	Montréal	Quebec	H3B 4G7
JAYTEX OF CANADA LIMITED	Toronto	Ontario	M6B 1S9

JCORP INC.	Saint-Laurent	Quebec	H4N 1J7
KIT AND ACE DESIGNS INC.	Vancouver	British Columbia	V5Y 1L8
LA MAISON SIMONS INC	Québec	Quebec	G1R 3V9
LAURA'S SHOPPE P V INC	Laval	Quebec	H7L 3W2
LE CHATEAU INC.	Saint-Laurent	Quebec	H4N 2M3
LES BOXERS BOYZ INC.	Montréal	Quebec	H2N 2J1
LES COLLECTIONS M.A.T. INC.	Montréal	Quebec	H2N 2H8
LES PLACEMENTS ARDEN INC/ARDEN HOLDINGS INC	Saint-Laurent	Quebec	H4S 1W8
LES VETEMENTS DE SPORT GILDANINC./GILDAN ACTIVEWEAR INC.	Montréal	Quebec	H3A 3J2
LOBLAWS INC.	Brampton	Ontario	L6Y 5S5
LOUIS GARNEAU SPORTS INC.	Saint-Augustin-de-desmaures	Quebec	G3A 2E6
LULULEMON ATHLETICA CANADA INC.	Vancouver	British Columbia	V6J 1C7
MANUFACTURE DE BAS CULOTTES LAMOUR INC	Montréal	Quebec	H2N 1A4
MARK'S WORK WEARHOUSE LTD.	Edmonton	Alberta	T5M 1Y6
MAURICES CANADA STORES, LTD.	Duluth	Minnesota	
MODE TRICOTTO	Montréal	Quebec	H2N 2E9
MODES CORWIK INC	Montréal	Quebec	H2N 2C9
MODES ZERO II 60 INC. ZERO II60 FASHIONS INC.	Montréal	Quebec	H2N 1P3
NIKE CANADA CORP	Toronto	Ontario	M5V 3C7
NORDSTROM CANADA RETAIL, INC.	Toronto	Ontario	M5B 2L9
NORTHERN REFLECTIONS LTD./REFLET BOREAL LTEE	Toronto	Ontario	M9B 6J8
NTD APPAREL INC / LES VETEMENTS NTD INC	Saint-Laurent	Quebec	H4T 1N1
NYGARD INTERNATIONAL PARTNERSHIP	Winnipeg	Manitoba	R2X 1R3
OLD BPSU WIND-DOWN CORP.	Toronto	Ontario	M5L 1B9
OLD NAVY CANADA INC.	Albuquerque	New Mexico	
OLD PSG WIND-DOWN LTD.	Blainville	Quebec	J7C 0N9
OLSEN FASHION CANADA INC	Mississauga	Ontario	L4W 2S5
OUTERSTUFF CANADA ULC	Aurora	Ontario	L4G 3H1
PHILHOBAR DESIGN CANADA LTD	Montréal	Quebec	H2N 2J1
PUMA CANADA INC.	Saint-Laurent	Quebec	H4R 2N7
PVH CANADA, INC.	Toronto	Ontario	M5V 3B1
R D INTERNATIONAL STYLE COLLECTIONS LTD/LES COLLECTIONS DE S	Montréal	Quebec	H4P 1L7
RALPH LAUREN CANADA LP	Toronto	Ontario	M5C 3G7
REITMANS INC	Toronto	Ontario	M5V 3J7
RICKI'S	Vancouver	British Columbia	V6B 4N8
ROOTS CORPORATION	Toronto	Ontario	M6B 4N4
RUNNERS CLOTHING INTERNATIONAL	Montréal	Quebec	H2N 2E7
SANMAR CANADA	Vancouver	British Columbia	V6P 3G1
SEARS CANADA INC.	Toronto	Ontario	M5B 2C3
SUZY'S INC.	Toronto	Ontario	M6A 2W1
THE CHILDREN'S PLACE CANADAL P	Mississauga	Ontario	L5R 4J2
THE MAMIYE GROUP, LLC	New York	New York	
THE NORTH FACE/JANSPORT/SMARTWOLL	San Leandro	California	
THRIFTYS INC. 2005	Toronto	Ontario	M6A 2W1
TRIMARK SPORTSWEAR CANADA INC.	Richmond Hill	Ontario	L4B 4W3
TWEEN BRANDS CANADA STORES LTD.	New Albany	Ohio	
TWIN HEART CLOTHING	Mont-Royal	Quebec	H4P 1N3
UNDER ARMOUR CANADA ULC	Markham	Ontario	L3R 8V2
UNIQLO CANADA INC.	Saint John	New Brunswick	E2L 2A9
URBAN OUTFITTERS WHOLESALE, INC	Philadelphia	Pennsylvania	

URBN CANADA RETAIL, INC.	Toronto	Ontario	M5K 0A1
VICTORIA'S SECRET STORES	Toronto	Ontario	M9C 5K6
WAL-MART CANADA CORP/LA COMPAGNIE WAL-MART DU CANADA	Mississauga	Ontario	L5N 1P9
WAREHOUSE ONE CLOTHING LTD.	Winnipeg	Manitoba	R3H 1H6
WINNERS DIVISION OF WINNERS MERCHANTS INT. LP.	Mississauga	Ontario	L4V 1Y2
YM INC. SALES	Toronto	Ontario	M6A 2W1
ZARA CANADA INC	Montréal	Quebec	H3B 4G7

(Government of Canada, 2018)

## Tariffs

Canada's tariff for **HS 611030 MMF Jerseys, Cardigans etc.** is 18% for MFN status countries. The tariff is zero rated for Least Developed Countries as well as for countries which have free trade agreements with Canada. Details of applicable tariffs, including MFN and preferential tariffs are given in Appendix 2.

## Non-tariff requirements

There are a total of 15 non-tariff requirements in relation to HS 611030. Their details are provided in the table below.

Table 12: Non-tariff measures for HS 611030 Jerseys, Pullovers etc. of MMF

UNCTAD, TRAINS NTMs database through Integrated Trade Intelligence Portal (I-TIP)				
15 measures				
Measures:	Sanitary and Phytosanitary [SPS] [A], Technical Barriers to Trade [TBT] [B], Pre-shipment inspection [INSP] [C], Contingent trade protective measures [CTPM] [D], Quantity control measures [QC] [E], Price control measures [PC] [F], Other measures [OTH] [G,H,I,J,K,L,M,N,O], Export-related measures [EXP] [P]			
Country imposing:	Canada			
Partner(s) affected:	Pakistan [Include the category "All partners"]			
Product(s):	HS codes: 611030			
Country imposing	Partner affected	Requirements	Phase	Measures
Canada	All Members	Pre-shipment inspection	In force	1
Canada	All Members	Price control measures	In force	1
Canada	All Members	Technical Barriers to Trade	In force	11
Canada	Bilateral	Export-related measures	In force	1
Canada	Bilateral	Pre-shipment inspection	In force	1

## HS 711319 Articles of jewelry and parts thereof, of precious metal other than silver

### Market Share & ECI

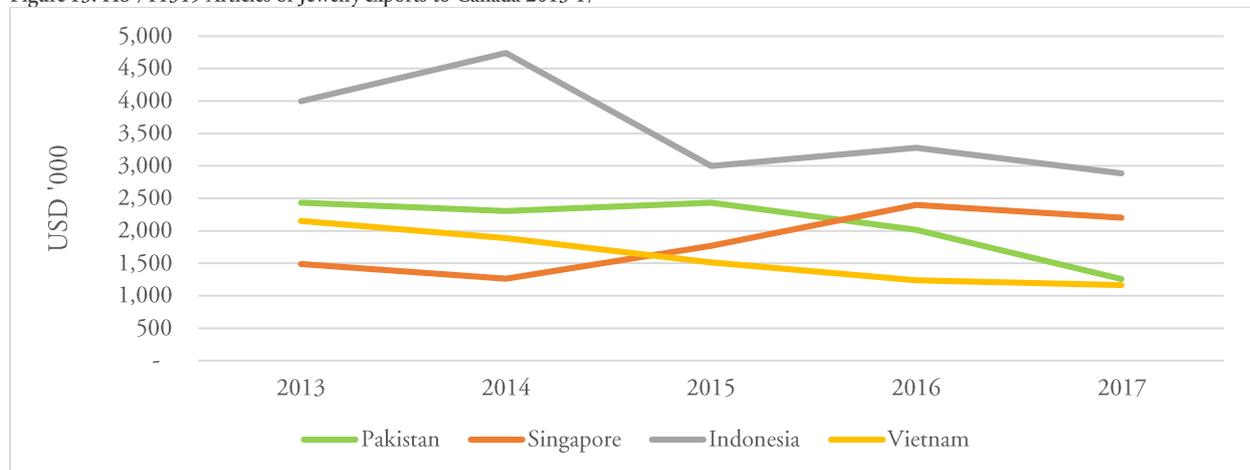
Table 13: Export Competitiveness Index for HS 711319 Articles of Jewelry other than silver

	Canada Imports from Countries (USD Mn)		ECI		Rank		Market Share	
	2013	2017	2013	2017	2013	2017	2013	2017
India	101.96	97.98	0.155	0.174	7	4	12.9%	13.0%
Thailand	36.11	20.15	0.202	0.055	6	9	4.583%	2.669%
Turkey	17.24	19.06	0.088	0.049	13	10	2.188%	2.524%
Indonesia	4.00	2.89	0.010	0.005	25	23	0.507%	0.382%
Singapore	1.49	2.20	0.083	0.031	14	13	0.189%	0.292%
Pakistan	2.44	1.26	0.007	0.002	27	30	0.309%	0.167%
Viet Nam	2.15	1.16	0.010	0.002	26	29	0.273%	0.154%

Canada's market for imports of **HS 711319 Articles of jewelry of metals other than silver** is worth USD 755mn. Pakistan's exports of this item is worth USD 1.26mn indicating a market share of

0.17%. Pakistan's exports of **articles of jewelry other than silver** have declined over the past 5 years from USD 2.4mn in 2013 to USD 1.3mn in 2017 indicating a fall in exports of almost 50%. Due to this, Pakistan's ranking in terms of ECI dropped from 27<sup>th</sup> in the Canadian market in 2013 to 30<sup>th</sup> in 2017. Meanwhile countries such as Turkey and Singapore increased their exports to the Canadian market to USD 19mn and USD 2.2mn respectively.

Figure 13: HS 711319 Articles of Jewelry exports to Canada 2013-17



Pakistan's exports have declined over the past 2 years as evident from the graph in Figure 13. Singapore, on the other hand, recognized the opportunity in the Canadian market i.e. a market size of USD 755mn and made attempts to gain market share in the aforementioned product market by importing the products from Malaysia and India and exporting them after value addition.

### What works for India?

India's exports of **HS 711319 articles of jewelry other than silver** to Canada amounted to USD 54mn in 2017. Jewelry is a labor-intensive industry and India has the advantage of low AUP. The wage rate for India is only USD 10 for every single carat of diamond they make. In comparison, Chinese and south African diamond shapers incur a cost of USD 17 and USD 40 to 60 respectively to shape a carat (Sanglimsuwan, Suanmali, & Ammarapala, 2013). Gems and jewelry is one of the most significant industries for India. This industry is responsible for nearly 15% of India's total exports since 1986 (Mukherjee & Mukherjee, 2012). India has an advantage of its vast diaspora located in many countries around the world including Canada. Many of the jewelers working in Canada are Indians therefore they have developed backwards linkages to industries located in India. They are able to easily procure articles of jewelry from India and sell within Canada.

India has also established Jaipur Jewelry Show Research & Development Centre, which is the colored gems research and development center. The purpose of the center is to support research about colored gems and how to change the property and improve quality. The Jaipur Jewelry Show also hosts India's largest exhibition of jewelry to local and foreign buyers. JJS provides a platform to gems and jewelry manufacturers to market these products. JJS also have a website devoted to their marketing and exhibition activities available at <http://www.jaipurjewelleryshow.org>.

In addition to that, the introduction of Diamond Dollar Account and Green card for exporters of polished diamonds and articles of jewelry have facilitated India's trade competitiveness.

DDAs are dollar denominated accounts that can be opened with banks in India by firms and companies dealing in purchase/sale of rough or cut and polished diamonds / precious metal jewelry plain, *minakari* and studded with/ without diamond and/ or other stones. “Permissible credits into DDA include amount of pre-shipment and post-shipment finance availed in dollars; realization of export proceeds from shipments of rough, cut, polished diamonds and diamond studded jewelry and realization in dollars from local sale of rough, cut and polished diamonds. Permissible debits to the DDA include payment for import/ purchase of rough diamonds from overseas/ local sources payment for purchase of cut and polished diamonds, colored gemstones and plain gold jewelry from local sources; payment for import/purchase of gold from overseas / nominated agencies and repayment of US Dollars loans availed from the bank; and transfer to rupee account of the exporter” (Kumar, 2018).

The Indian government also implemented several policies to help exports of gems and jewelry. The government headed the replenishment (REP) license in the 1960s which allowed producers to import the relevant raw materials without an upper bound on foreign exchange. Customs duty, on rough gemstones, of 45% was also abolished in 2003. Import tariff on diamonds and gemstones were also reduced from 15% to 5% in 2003. In 2005, further exemption on service tax of production related to the manufacturing of cut and polished diamonds, gemstones and other forms of jewelry resulted in greater business activity. The EXIM policy of 2002 reduced value-addition norms on exports of plain jewelry from 10% to 7%. Jewelry exports were allowed on consignment basis, which allowed domestic exporters, stationed in foreign markets, with unsold inventory to re-import. FDI up to 74% was allowed by the government for mining of gemstones and diamonds (Mukherjee & Mukherjee, 2012).

### What works for Singapore?

Singapore’s exports of HS 711319 articles of jewelry amounted to USD 2.2mn in 2017. Singapore’s main strategy is to import items from Malaysia and India, implement value addition and then export to Canada. Singapore’s total exports of articles of jewelry from Malaysia amounted to USD 145mn. The free trade agreement between Malaysia and Singapore and, in a larger context, the intra-trade agreement between ASEAN countries allows the respective countries to reap the full benefit of free trade within the region. As a result of value addition, Singapore has been able to increase its exports to Canada of articles of jewelry from USD 1.5mn to USD 2.2mn. Singaporean suppliers have also embraced e-commerce opportunities such as Alibaba and have started to market their products through e-commerce platforms.

Table 14: Additional Information for export of HS 711319 Articles of Jewelry

<b>Additional Information</b>		
Pakistan	India	Singapore
<b>Distance (km)</b>		
16,700	17,100	20,700
<b>AUP (USD per Ton)</b>		
29,952,381	29,745,598	29,783,784
<b>Non-Tariff Requirements</b>		
7	7	7

## Importers Database

List of top importers of **HS 711319** are given below for exporters' convenience:

Table 15: Canada's Top Importers for HS 711319 Articles of Jewelry other than silver

711319 Articles Of Jewelry - Precious Metals (Other Than Silver)			
Major Canadian Importers in 2016			
Number of companies:	63		
Company name	City	Province	Postal code
2407938 ONTARIO INC.	Toronto	Ontario	M3L 0A1
4553641 CANADA INC.	Toronto	Ontario	M3C 1J5
ACADEMY CUSTOMS & TRAFFIC INC	Mississauga	Ontario	L4V 1H3
ASAHI REFINING CANADA LTD.	St Catharines	Ontario	L2P 3J1
B. H. MULTI COLOR CORP.	New York	New York	
BH MULTI COM CORP	New York	New York	
BHARAT JEWELLERS INC.	Surrey	British Columbia	V3W 1R1
BIJOUTERIE ALMAR INC / ALMAR JEWELLERY INC	Montréal	Quebec	H3B 1M1
BIRKS GROUP INC.	Montréal	Quebec	H3A 2A5
BLUE NILE, LLC	Seattle	Washington	
BRILLIANT EARTH INC.	San Francisco	California	
BULGARI CANADA INC.	Montréal	Quebec	H3B 3V2
CHANEL INC.	Candiac	Quebec	J5R 1B6
CHARM JEWELRY LIMITED	Dartmouth	Nova Scotia	B2Y 1J1
CHRISTIAN BOURDIN ENTREPRISES INC.	Montréal	Quebec	H3B 1M1
CLOVER CANADA	New York	New York	
CORONA JEWELLERY COMPANY LIMITED	Toronto	Ontario	M6S 3N9
COSTCO WHOLESALE CANADA LTD	Ottawa	Ontario	K2E 1C5
DE BEERS DIAMOND JEWELLERS CANADA LTD.	Vancouver	British Columbia	V6E 1A3
DUPOUIS ESTATE JEWELLERS & APPRAISERS INC.	Toronto	Ontario	M5R 2A5
EVERGREEN IMPORTS & EXPORTS LTD	Thornhill	Ontario	L4J 7K6
EVIHAN JEWELLERY LIMITED	Toronto	Ontario	M5C 1R6
FAIRMONT IMPEX LTD.	Mississauga	Ontario	L4T 0A4
FEDERAL EXPRESS CANADA CORPORATION	Mississauga	Ontario	L4W 5K6
FIELDS STOREA DIV. OF HUDSONS BAY	Toronto	Ontario	M5H 2Y4
FINECRAFT	Toronto	Ontario	M3L 1G5
FIRST CANADIAN DIAMOND CUTTING WORKS	Montréal	Quebec	H4P 1V5
GORDON BROTHERS CANADA ULC	Boston	Massachusetts	
GUCCI	Saint John	New Brunswick	E2L 5B7
HOLT, RENFREW & CIE, LIMITEE/HOLT, RENFREW & CO., LIMITED	Toronto	Ontario	M4W 3B8
HRA GROUP HOLDINGS LTD.	Vancouver	British Columbia	V6E 0C3
ITALGOLD INC	Toronto	Ontario	M9C 5H5
J S N JEWELLERY INC	Concord	Ontario	L4K 3P3
JOMARK DISTRIBUTORS INC.	Woodbridge	Ontario	L4L 1A6
JOSTENS CANADA LTD	Winnipeg	Manitoba	R3H 0G9
KNAR JEWELLERY LIMITED	Guelph	Ontario	N1H 4E6
KOH-I-NOOR	Calgary	Alberta	T3J 3K9
LAO FENG XIANG JEWELRY CANADA INC.	Vancouver	British Columbia	V6E 1A3
LES BIJOUTIERS DOUCET 1993 INC	Montréal	Quebec	H2N 2A5
LES IMPORTATIONS SINDBAD INC	Montréal	Quebec	H3B 1B1
LOUIS VUITTON CANADA, INC.	New York	New York	
LUK FOOK JEWELLERY & GOLDSMITH CANADA LTD	Richmond Hill	Ontario	L4B 3A5
M-C GEMS LIMITED	Toronto	Ontario	M5C 2M6
MARK LASH DESIGN	Richmond Hill	Ontario	L4B 4K3

MERCURY JEWELLERY INC.	Concord	Ontario	L4K 3V6
MICHAEL HILL JEWELLER CANADA LTD.	Mississauga	Ontario	L4W 4J4
NEW GHAI JEWELLERS INC	Brampton	Ontario	L6P 1S1
NUASHOK JEWELLERS LTD.	Mississauga	Ontario	L4T 2H3
PANDORA JEWELRY LTD.	Toronto	Ontario	M9C 5K5
PARIS JEWELLERS LTD	Edmonton	Alberta	T5S 2X4
QUALIGEM DESIGNS LTD.	Concord	Ontario	L4K 2Z6
R S TRADING	Brampton	Ontario	L6P 3A4
RADIO DIV OF ROGERS BROADCASTING LIMITED	Toronto	Ontario	M4Y 2Y5
RAFFI JEWELLERS INC	Waterloo	Ontario	N2L 5W6
RICHEMONT CANADA, INC.	Mississauga	Ontario	L4W 3W6
SECA GEMS LTD.	Burnaby	British Columbia	V5M 4A2
SHINY JEWELLERS	Toronto	Ontario	M5C 2M6
SIBA JEWELLERS	Vancouver	British Columbia	V5T 1B1
TECIMER JEWELLERY LIMITED	Toronto	Ontario	M5C 1R6
TIFFANY & CO CANADA VANCOUVER	Toronto	Ontario	M5S 2X9
WINNERS DIVISION OF WINNERS MERCHANTS INT. LP.	Mississauga	Ontario	L4V 1Y2
YURMAN RETAIL CANADA CORP.	Halifax	Nova Scotia	B3J 3N2
ZALE CANADA CO.	Markham	Ontario	L3R 3L3

(Government of Canada, 2018)

## Tariffs

The tariffs on **HS 711319 articles of jewelry other than silver** are 5% and 6.5% for each of the sub codes under the harmonized system. Details of the tariffs and agreements for which tariff is zero rated are given in Appendix 2.

## Non-tariff requirements

There are a total of 7 non-tariff requirements in relation to HS 711319. Their details are provided in the table below.

Table 16: Non-tariff measures for HS 711319 Articles of Jewelry other than silver

UNCTAD, TRAINS NTMs database through Integrated Trade Intelligence Portal (I-TIP)				
7 measures				
Measures:	Sanitary and Phytosanitary [SPS] [A], Technical Barriers to Trade [TBT] [B], Pre-shipment inspection [INSP] [C], Contingent trade protective measures [CTPM] [D], Quantity control measures [QC] [E], Price control measures [PC] [F], Other measures [OTH] [G,H,I,J,K,L,M,N,O], Export-related measures [EXP] [P]			
Country imposing:	Canada			
Product(s):	HS codes: 711319			
Country imposing	Partner affected	Requirements	Phase	Measures
Canada	All Members	Pre-shipment inspection	In force	1
Canada	All Members	Price control measures	In force	1
Canada	All Members	Technical Barriers to Trade	In force	3
Canada	Bilateral	Export-related measures	In force	1
Canada	Bilateral	Pre-shipment inspection	In force	1

## HS 210690 Food preparations n.e.s

### Market Share & ECI

**Food preparations** constitute an important part of Canada’s imports. These items have a market size of USD 1.3bn in Canada while Pakistan exports of products under this HS code, to Canada, are worth USD 1mn indicating a market share of 0.08%. Pakistan exports a variety of items under this HS code including syrups, jelly powders, flavorings, whiteners and various other products.

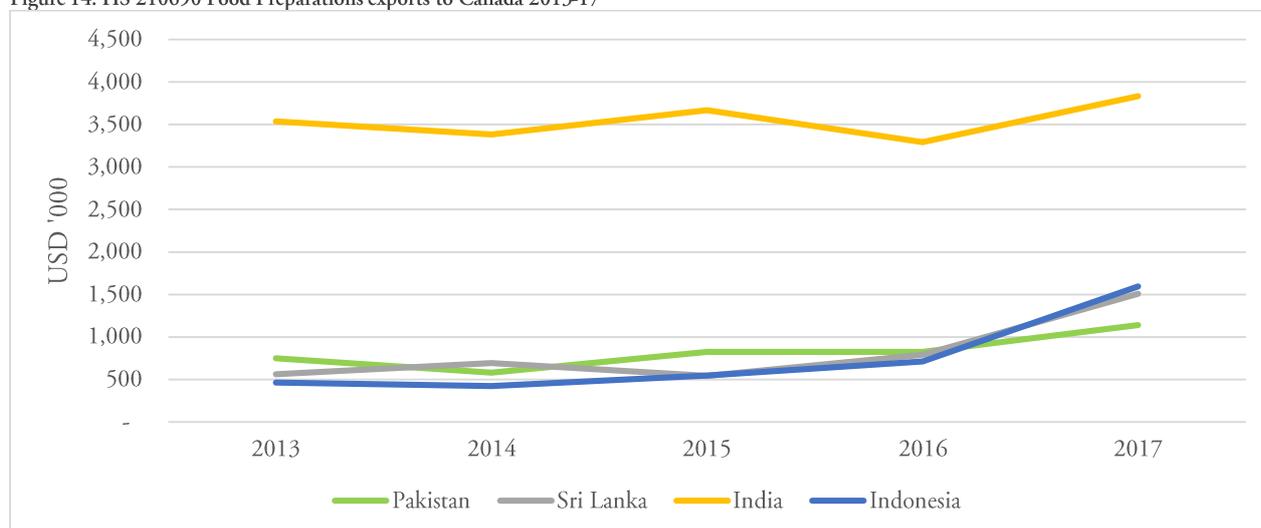
Table 17: Export Competitiveness Index for HS 210690 Food Preparations

	Canada Imports from Countries (USD Mn)		ECI		Rank		Market Share	
	2013	2017	2013	2017	2013	2017	2013	2017
India	3.54	3.84	0.002	0.001	32 ↓	35	0.272%	0.285%
Turkey	0.46	2.17	0.001	0.004	33 ↑	30	0.035%	0.161%
Korea, Republic of	1.59	1.96	0.005	0.006	23 ↓	26	0.123%	0.145%
Indonesia	0.46	1.60	0.000	0.001	38 ↑	36	0.036%	0.118%
Sri Lanka	0.56	1.51	0.004	0.010	25 ↑	22	0.043%	0.112%
Pakistan	0.75	1.14	0.001	0.001	34 ↓	38	0.058%	0.085%
Viet Nam	0.26	0.80	0.000	0.001	36 ↓	37	0.020%	0.059%
Malaysia	0.55	0.74	0.002	0.003	28 ↓	31	0.043%	0.055%

Turkey and Vietnam exhibited the highest growth in exports with increases of 370% and 209% over the past 5 years respectively. Pakistan’s ECI ranking declined from 34<sup>th</sup> in 2013 to 38<sup>th</sup> in 2017 indicating declining competitiveness in exports of **food preparations** to the Canadian market.

As mentioned before, **Food Preparations** was classified as a “Lost Opportunity” for Pakistan indicating great potential in the Canadian market. In order to capture more market share, Pakistan should look to export items classified under food preparations and conduct more trade promotion activities related to these products.

Figure 14: HS 210690 Food Preparations exports to Canada 2013-17



Many of Pakistan’s competitors, including India and Sri Lanka, have identified Food Preparations as having key potential to boost exports towards Canada. India’s Food Preparations exports are worth USD 3.8mn. Sri Lanka’s exports jumped from USD 0.56mn in 2013 to USD 1.51mn in 2017 indicating an increase of over 168% over the past 5 years. Pakistan has the capability to capitalize on this sector due to the presence of capable manufacturing companies such as Engro Foods, National Foods, Shan Foods etc which have the marketing competency to brand their products and export to Canada. Engro Foods has been partially acquired by the Dutch food

giant Friesland Campina, therefore Engro Foods can leverage their position by obtaining technical expertise and know-how in exporting many of its branded products such as Olpers, Omung, Tarang, Onaaj etc. from Pakistan to all over the world including Canada. National Foods and Shan already export packaged spices to Europe and North America and therefore have the experience and contacts to penetrate and further gain market share with their newer products such as jams, marmalade and various other products. Therefore, Pakistan has the capability to enhance exports in food preparations sector and since Canada's imports amount to USD 1.3bn, packaged and branded food preparations can become a major export item for Pakistan to increase exports towards Canada.

#### What India has done?

India's total exports of HS 210690 Food Preparations n.e.s. amounted to USD 216mn in 2017. USD 12mn of this amount was exported to Canada. India has initiated several types of food preparations exports ranging from packaged spices to ready-to-eat microwave meals. India has capitalized on the busy lifestyle of western nations and offered ready-to-eat microwave meals as an alternative solution to cooking which may be time-consuming for some customers. A variety of items are offered by Indian exporters including packaged spices, packaged samosas, packaged qorma and much more. Vegetarian options are also catered to by India. India has also taken advantage of the presence of subcontinental diaspora present in Canada by offering Indian food preparation options. Indian suppliers have also utilized e-commerce platforms such as Alibaba, Amazon and IndiaMART to sell food items and food preparations. Other major exports from India including Darjeeling tea which is famous for its cultivation in Assam. Items such as milk or cream substitutes, syrups, sweetening agents, cheese fondue are also attractively packaged and exported to Canada.

#### What Indonesia has done?

Indonesia has benefited from its market image as the world's leading supplier of spices. Known as the Spice Islands since the 1800s, Indonesian spices have been in demand the world over. While Pakistan offered open (*Khulla*) spices, Indonesia transitioned to beautiful packaging and branding for export. Other notable items include chewing gum preparations from Indonesia in which Indonesia has an advantage due to availability of local rubber plantations in the South East Asia region which facilitate raw material sourcing.

#### What Sri Lanka has done?

Sri Lanka's major food preparation items include herbal tea, milk foods, beverages and soy based milk alternatives. Sri Lanka has a comparative advantage in tea and its derived products because Sri Lankan tea is renowned all over the world. However, Sri Lanka has also advanced towards offering milk derived products and soy based milk which Pakistan also has the capability to do especially since Engro Foods has been partially acquired by the Dutch food giant Friesland Campina and can benefit from their experience and contacts.

Table 18: Additional Information for export of HS 210690 Food Preparations

Additional Information			
Pakistan	India	Sri Lanka	Indonesia
<b>Distance (km)</b>			
16,700	17,100	17,900	22,700
<b>AUP (USD per Ton)</b>			
1,756	3,258	3,073	2,699
<b>Non-tariff requirements</b>			
109	109	109	109

## Importers Database

The top Canadian importers for **HS 210690 Food Preparations** are given below for exporters' convenience:

Table 19: Canada's Top Importers for HS 210690 Food Preparations n.e.s.

210690 Food Preparations Nes (Including Flavoring Powders, Sweets, Gums And The Like)			
Major Canadian Importers in 2016			
Number of companies:	122		
Company name	City	Province	Postal code
9314-8591 QUEBEC INC.	Boucherville	Quebec	J4B 5H1
ABBOTT LABORATORIES, LIMITED	Saint-Laurent	Quebec	H4S 1R3
AGROPUR COOPERATIVE AGROPUR COOPERATIVE	Truro	Nova Scotia	B2N 5A5
ALIMENTS WEINS LTEE / WEINS FOODS LTD.	Saint-Léonard	Quebec	H1P 3J8
ANB CANADA INC.	Newmarket	Ontario	L3X 3C7
ARIZONA BEVERAGES USA LLC	Woodbury	New York	
ARYZTA LIMITED	San Leandro	California	
ATRIUM INNOVATIONS INC.	Westmount	Quebec	H3Z 3C1
BARRY CALLEBAUT CANADA INC.	Saint-Hyacinthe	Quebec	J2S 1Y7
BAUSCH & LOMB CANADA INC.	Concord	Ontario	L4K 4B4
C. W. SHASKY & ASSOCIATES LTD.	Oakville	Ontario	L6H 5W8
CALDIC CANADA INC.	Mississauga	Ontario	L5N 8E2
CAMPBELL COMPANY OF CANADA/COMPAGNIE CAMPBELL DU CANADA	Toronto	Ontario	M8V 2B8
CANTERBURY COFFEE CORPORATION	Burnaby	British Columbia	V5J 0E6
CARAVAN INGREDIENTS INC.	Lenexa	Kansas	
CHEMROY CANADA HOLDINGS INC.	Brampton	Ontario	L6T 4X3
CHOCOLAT FREY AG	Buchs Ag		
CHURCH & DWIGHT CANADA CORP.	Mississauga	Ontario	L5S 0A5
CLUBHOUSE DIVISION	London	Ontario	N5W 3V9
COCA-COLA REFRESHMENTS CANADA COMPANY	Toronto	Ontario	M5A 1L1
CONAGRA FOODS CANADA INC./ ALIMENTS CONAGRA CANADA INC	Mississauga	Ontario	L4W 5K7
CONTINENTAL INGREDIENTS CANADA INC.	Oakville	Ontario	L6H 6G1
CONTINENTAL MILLS, INC	Tukwila	Washington	
DAIRY-TECH LIMITED	Mississauga	Ontario	L4T 3L8
DANISCO CANADA INC.	Mississauga	Ontario	L5N 0C9
DAVIDSTEA INC.	Mont-Royal	Quebec	H4P 1M2
DAWN FOOD PRODUCTS CANADA LTD.	Brampton	Ontario	L6T 0C8
DEALERS INGREDIENTS INC.	Brampton	Ontario	L6T 4W1
DR PEPPER/SEVEN UP INC	Plano	Texas	
DSM NUTRITIONAL PRODUCTS CANADA INC.	Ayr	Ontario	N0B 1E0
DURE FOODS	Brantford	Ontario	N3R 7K2
E.D. SMITH FOODS, LTD./LES ALIMENTS E.D. SMITH LTEE	Stoney Creek	Ontario	L8E 5S3
EMPIRE HEALTH DISTRIBUTION INC/DISTRIBUTION SANTE EMPIRE INC	Terrebonne	Quebec	J6Y 1Y5

FONA INTERNATIONAL CANADA ULC.	Mississauga	Ontario	L5S 1G1
FRITO LAY CANADA	Mississauga	Ontario	L5B 1M5
G VAN KAM TRADING CO LTD/COMPAGNIE DE COMMERCE G VAN KAM LTE	Westmount	Quebec	H3Z 1N1
GARDEN PROTEIN INTERNATIONAL INC.	Richmond	British Columbia	V6V 3C8
GENERAL MILLS CANADA CORPORATION /CORPORATION GENERAL MILLS	Mississauga	Ontario	L4W 5P6
GENERAL NUTRITION CENTRES COMPANY	Pittsburgh	Pennsylvania	
GFS-MILTON	Milton	Ontario	L9T 5G4
GILSTER-MARY-LEE CORPORATION	Markham	Ontario	L3R 5B4
GIVAUDAN CANADA CO/COMPAGNIE GIVAUDAN CANADA	Mississauga	Ontario	L4W 5G9
GLAXOSMITHKLINE CONSUMER HEALTHCARE INC.	Mississauga	Ontario	L5N 6L4
GLOBAL EGG CORPORATION	Toronto	Ontario	M8Z 4Y4
GLOBAL MAIL, INC.	Weston	Florida	
GRIFFITH FOODS LIMITED	Toronto	Ontario	M1L 3J8
H. C. BRILL COMPANY, INC.	Tucker	Georgia	
HAIN-CELESTIAL CANADA, ULC	Toronto	Ontario	M9W 6A9
HEARTLAND FOOD PRODUCTS GROUP	Carmel	Indiana	
HERBALIFE OF CANADA LTD./HERBALIFE DU CANADA LTEE	Saint-Laurent	Quebec	H4M 2Z2
HERSHEY CANADA INC.	Mississauga	Ontario	L4W 0B1
IOVATE HEALTH SCIENCES RESEARCH	Oakville	Ontario	L6M 0H4
ISAGENIX INTERNATIONAL, LLC	Gilbert	Arizona	
JAMIESON LABORATORIES LTD.	Toronto	Ontario	M5H 2T6
JEUNESSE GLOBAL MARKETING LTD.	Burnaby	British Columbia	V5J 3J1
JOHNSON & JOHNSON INC.	Saint-Laurent	Quebec	H4S 1Z6
KELLOGG CANADA INC.	Mississauga	Ontario	L4W 5S1
KERRY INGREDIENTS	Woodstock	Ontario	N4S 0A9
KINGSMILL FOODS COMPANY LIMITED	Toronto	Ontario	M1P 2L6
KRAFT CANADA DON MILLS	Toronto	Ontario	M3B 3L6
LABORATOIRES CONFAB INC. / CONFAB LABORATORIES INC.	Longueuil	Quebec	J4H 3Z6
LES ALIMENTS MULTIBAR INC.	Anjou	Quebec	H1J 3A9
LIVINGSTON INTERNATIONAL INC.	Toronto	Ontario	M9C 5K7
LOBLAWS INC.	Brampton	Ontario	L6Y 5S5
LOW VALUE SHIPMENTS	Windsor	Ontario	N9A 6J3
MARTIN-BROWER OF CANADA CO/CIE MARTIN BROWER DU CANADA	Mississauga	Ontario	L5N 8R9
MCDONALD'S RESTAURANTS OF CANADA LIMITED	Toronto	Ontario	M3C 3L4
MEAD JOHNSON NUTRITION CANADA CO.	Ottawa	Ontario	K2K 3B8
MELALEUCA OF CANADA, INC.	Idaho Falls	Idaho	
MEOW GLOBAL NETWORKS, INC.	Los Angeles	California	
MONDELEZ CANADA INC.	Toronto	Ontario	M8X 2X2
MOTHER PARKER'S TEA & COFFEE INC.	Mississauga	Ontario	L4Y 1S4
MTC ANIMAL HEALTH DIVISION	Mississauga	Ontario	L5N 0A1
NATURAL CALM	Thornhill	Ontario	L4J 1K6
NATURAL FACTORS	Coquitlam	British Columbia	V3K 6Y2
NATURE'S SUNSHINE PRODUCTS OF CANADA LTD	Brampton	Ontario	L6T 4B5
NESTLE BEVERAGE CO.	Freehold	New Jersey	
NESTLE CANADA-HEAD OFFICE	Toronto	Ontario	M5P 2V4
NEW CHAPTER CANADA INC.	Markham	Ontario	L3R 0M3
NORTHERN GOLD FOODS LTD.	Port Coquitlam	British Columbia	V3C 3T7
NOVARTIS CONSUMER HEALTH CANADA INC./NOVARTIS SANTE FAMILIAL	Mississauga	Ontario	L5N 0C2

NU SKIN CANADA, INC	Mississauga	Ontario	L5L 5Z9
NUTRIVO SALES AND MARKETING INC.	Bedford	Nova Scotia	B4A 1E6
PEAK FOODS LLC	Troy	Ohio	
PINNACLE FOODS CANADA CORPORATION	Mississauga	Ontario	L5N 2R7
PLANET FOODS INC	Calgary	Alberta	T2C 2J7
PLEXUS WORLDWIDE, LLP	Scottsdale	Arizona	
PREGEL CANADA INC.	Aurora	Ontario	L4G 0K2
PRIME HEALTH LTD.	Port Coquitlam	British Columbia	V3C 6N9
PURATOS CANADA INC	Mississauga	Ontario	L5T 0A1
PURESOURCE INC	Guelph	Ontario	N1H 6J3
PURITY PRODUCTS	Plainview	New York	
QUADRA CHEMICALS LTD. QUADRA CHIMIE LTEE	Vaudreuil-Dorion	Quebec	J7V 5V5
RECTOR FOODS LIMITED	Brampton	Ontario	L6S 6C6
RENEW LIFE CANADA INC	Brampton	Ontario	L6W 4V3
RICH PRODUCTS OF CANADA LIMITED	Fort Erie	Ontario	L2A 1W3
RONALD A. CHISHOLM LIMITED	Toronto	Ontario	M4W 3K3
SAPUTO PRODUITS LAITIERS CANADA S.E.N.C. / SAPUTO DAIRY PROD	Saint-Léonard	Quebec	H1P 1X8
SENSIENT FLAVORS CANADA INC	Kingston	Ontario	K7L 4X6
SHS NORTH AMERICA	Laval	Quebec	H7V 4B4
SODASTREAM CANADA LTD.	Winnipeg	Manitoba	R3M 0G4
STARBUCKS COFFEE CANADA, INC.	Toronto	Ontario	M2N 6L7
TARA NATURAL	Burnaby	British Columbia	V3N 0B2
TEAM BEACHBODY CANADA LIMITED PARTNERSHIP	Vancouver	British Columbia	V7X 1M5
THE JUICE PLUS COMPANY CANADA INC.	Mississauga	Ontario	L4W 4Y3
THE PROCTER & GAMBLE COMPANY	Cincinnati	Ohio	
TRUE NORTH NUTRITION LTD	Richmond Hill	Ontario	L4B 4A8
UFL FOODS	Mississauga	Ontario	L5T 2R9
UNFI CANADA, INC.	Concord	Ontario	L4K 2N1
UNILEVER COSMETICS INTERNATIONAL CANADA	Toronto	Ontario	M4W 3R2
UNITED PARCEL SERVICE CANADA LTD	Fredericton	New Brunswick	E3B 6A2
USANA CANADA CO	Halifax	Nova Scotia	B3J 2X2
VITA HEALTH PRODUCTS INC.	Winnipeg	Manitoba	R2J 3W2
VITALIZE, LLC	Boise	Idaho	
WEAVER POPCORN COMPANY INC	Noblesville	Indiana	
WHITEWAVE CANADA ULC	Toronto	Ontario	M6K 3G3
WILLIAM L. RUTHERFORD LIMITED	Mississauga	Ontario	L4V 1T3
WILTON INDUSTRIES CANADA COMPANY	Toronto	Ontario	M9W 5R1
WOODBOLT DISTRIBUTION, LLC	Bryan	Texas	
WRIGLEY CANADA	Toronto	Ontario	M2H 3S8
YOUNG LIVING CANADA ULC	Vancouver	British Columbia	V6Z 2M1
YOUNGEVITY INTERNATIONAL, INC.	Chula Vista	California	
(Government of Canada, 2018)			

## Tariffs

Tariffs for **HS 210690 Food Preparations n.e.s** vary greatly depending on the type of product. Due to the vast diversity of products under this category, tariffs are subject to the type of product and the FTAs that Canada has signed with countries and trading blocs. Details of the tariff structure are given in Appendix 2.

## Non-tariff requirements

There are a total of 113 non-tariff requirements in relation to **HS 210690 Food Preparations**. Their details are provided in the table below.

UNCTAD, TRAINS NTMs database through Integrated Trade Intelligence Portal (I-TIP)				
113 measures				
Measures:	Sanitary and Phytosanitary [SPS] [A], Technical Barriers to Trade [TBT] [B], Pre-shipment inspection [INSP] [C], Contingent trade protective measures [CTPM] [D], Quantity control measures [QC] [E], Price control measures [PC] [F], Other measures [OTH] [G,H,I,J,K,L,M,N,O], Export-related measures [EXP] [P]			
Country(ies) imposing:	Canada			
Product(s):	HS codes: 210690			
Country imposing	Partner affected	Requirements	Phase	Measures
Canada	All Members	Export-related measures	In force	5
Canada	All Members	Pre-shipment inspection	In force	1
Canada	All Members	Price control measures	In force	3
Canada	All Members	Quantity control measures	In force	6
Canada	All Members	Sanitary and Phytosanitary	In force	28
Canada	All Members	Technical Barriers to Trade	In force	65
Canada	Bilateral	Export-related measures	In force	1
Canada	Bilateral	Pre-shipment inspection	In force	1
Canada	Bilateral	Sanitary and Phytosanitary	In force	3

## TRADE MISSION INFORMATION

The trade mission, also known as Commercial Counselor, is located in Montreal, Canada. The commercial counselor is responsible for trade promotional activities as well as serving as a liaison between exporters and buyers. Interested exporters can approach the Commercial Counselor for trade related inquiries, trade facilitation and visa processing, information on potential buyers as well as requests to setup meetings with buyer contacts in communication with the Commercial Counselor. The webpage for the Consulate General is: [www.pakconsulatemontreal.org](http://www.pakconsulatemontreal.org).

The trade mission in Canada can be approached at the following addresses:

For trade queries	<a href="mailto:paktrade@bellnet.ca">paktrade@bellnet.ca</a>
	<a href="mailto:parepmontreal@bellnet.ca">parepmontreal@bellnet.ca</a>
For Consular matters (visa, passport, attestation):	<a href="mailto:parepmontreal@mofa.gov.pk">parepmontreal@mofa.gov.pk</a>

## TDAP EXHIBITION CALENDAR

As per the TDAP Exhibition calendar, there are two events scheduled for 2018 in Canada:

S.No	Details of Event	Dates	Products
1	SIAL Food Fair Canada, Montreal, Canada	May 2019	Food Products
2	Apparel Textile Sourcing Canada, Toronto, Canada	August 2019	Apparel & Textiles, Accessories

Potential exporters and interested associations from different sectors are welcome to approach TDAP for launch of local and foreign exhibitions.

## SWOT ANALYSIS

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### Strengths

Pakistan's strength lies in the following sectors:

- High Quality Basmati Rice
- Surgical Instruments
- Strong Textile Sector
- Sports Goods

By leveraging its strengths and positioning its brand image as the world's top quality supplier of the aforementioned items, Pakistan can place itself as the first choice for procurement of these items from buyers from all over the world.

In terms of exports to Canada specifically, Pakistan's strength lies in its export of rice for which Canada's imports amounted to USD 233mn in 2017 while Pakistan's exports to Canada amounted to USD 9mn. Other strengths of Pakistan include its cotton textile products, however they come under stiff competition from other countries such as Vietnam and Bangladesh.

### Weaknesses

The following weaknesses are viewed by buyers as obstacles to approaching Pakistani suppliers when procuring items such as textiles:

- Institutional Instability
- Low Value Added Products
- Low Product Diversification
- Low Use of Man Made Fiber (MMF)

In terms of exports to Canada, Pakistan's weaknesses are mostly internal to the country. High cost of production leads to high AUP. Pakistan's reliance on cotton fabrics while the world's growing demand for MMF has hurt Pakistan's exports. Duties on machineries for MMF are higher than duties on machineries used in cotton fiber manufacture leading to disincentives for manufacturers to switch from cotton to MMF.

### Opportunities

As identified in this report, Pakistan has the opportunity to enhance exports in the following segments to increase exports to the Canadian market:

- HS 300490 Medicaments consisting of mixed or unmixed products for therapeutic or prophylactic purposes.
- HS 901890 Instruments and appliances used in medical, surgical or veterinary sciences, n.e.s.
- HS 610330 Jerseys, pullovers, cardigans, waistcoats and similar articles, of man-made fibers.
- HS 711319 Articles of jewelry and parts thereof, of precious metal other than silver.

- HS 210690 Food Preparations n.e.s.

### Threats

Threats to exports mainly come in the form of high energy costs, fluctuating lead times which are a big concern for buyers and the emergence of strong regional competitors such as Bangladesh which takes advantage of its LDC status to increase its quota, India which has well developed linkages all over the world and low AUP, Vietnam, Malaysia, Indonesia, Thailand etc. which take advantage of low production costs and procurement from the region due to ASEAN regional agreements.

- High Energy Costs
- Fluctuating Lead Times
- High gas costs
- Law & Order situation deters buyers.
- Emergence of strong competitors
- More demand for MMF

In terms of exports to Canada specifically, Pakistan should look forward to threats from other countries such as Vietnam, which have been able to produce better quality cotton fabrics due to their policy of procuring cotton yarn from international sources and weaving it locally and then exporting it. Pakistan has also followed the same strategy however, duties on cotton imported from USA to Pakistan as a raw material amounts to 3% while cotton imported as a raw material from USA to Vietnam is duty free. Vietnam has also been able to procure superior raw materials from the ASEAN region duty free, while Pakistan has imposed tariffs on raw materials in order to provide protection to the local industry. While this strategy may provide protection, it does so at a cost of lower quality end product and that is why Vietnam has been able to provide superior quality cotton fabrics in the Canadian market as compared to Pakistan. Pakistan has also not been able to compete with Thailand in terms of rice due to the fact that Pakistan has failed to invest in newer varieties during the last decade while Thailand has produced several varieties in support of jasmine rice.

## CONCLUSION AND RECOMMENDATIONS

The key to increasing exports to Canada appears to be its **free trade agreements**. In nearly all products, the largest suppliers to Canada were countries which had free trade agreements with Canada. Countries such as USA and Mexico were the biggest suppliers due to NAFTA and geographical proximity. Countries such as China and Germany also benefited from FIPA and Canada-European free trade agreement. Japan, which is Canada's fifth largest trading partner, is also in negotiations to establish an FTA. India is also in negotiations with Canada for approval of FTA and FIPA. The tenth round of negotiations towards a Canada-India Comprehensive Economic Partnership Agreement (CEPA) was held on August 21-23, 2017 (Global Affairs Canada, 2017). Therefore, if Pakistan is to increase trade relations with Canada, it should look forward to negotiating trade agreements with Canada in a manner similar to India.

## Making your exports cheaper

In a typical pricing model like the one in Figure 15, FTAs can potentially reduce one of the cost components – import duties.

Figure 15 FTA Advantages for Exports



An **increase in the use of e-commerce platforms** similar to China's Alibaba will result in cost savings for exporters as adoption of this practice will result in savings from several costs associated with trade fairs and exhibitions such as booking stall space, traveling costs, accommodations etc. Due to this reason, several exporters from ASEAN countries especially Vietnam and Thailand are using Alibaba's platform to sell products from Vietnam/Thailand to other countries. Pakistani exporters should also look to adopt this sell strategy. Several retailers are already using existing e-commerce platforms such as daraz.pk to sell within Pakistan. The same platforms can also be used by B2B sellers to sell their wares. Exporters have 2 options for e-

commerce platforms: using existing platforms which sell to foreign buyers such as Alibaba or new Pakistani platforms. Newer Pakistani platforms, such as PriceOye.pk (started by an intelligent, budding entrepreneur nominated in Forbes 30 under 30 List), OLX and daraz.pk, would be cheaper compared to Alibaba but are not as well-known among foreign buyers as the latter. Therefore, the new local platforms are cheaper but run the risk of not having many visits from foreign buyers. Existing established platforms such as Alibaba and EBay have the advantage of being well-known among foreign buyers and several 3<sup>rd</sup> party country exporters such as those from Vietnam and Thailand are already selling via Alibaba. Thus Alibaba and EBay have the expertise of foreign selling from country to country. However, these platforms are expensive but they also have more chances of foreign buyers visiting their site and therefore the conversion rate for visits turning into sales increases for well-known established platforms.

The **products identified in this report** are in high demand in Canada. The recommended products are backed by data from Canada i.e. import demand of said products by Canada is high and Pakistan's exports to Canada for each item is in the top 200 list of items exported to that country. The corresponding tariffs, non-tariffs and importers list have also been shared for exporters convenience. To enhance exports in the Canadian market, Pakistan should look to export the items identified in this report. The list of top importers has also been provided for exporters convenience. Exporters should look to contact these buyers and exhibit their products to pique the buyers' interests.

**Establishing cordial relations** is also important to create business contracts. Sri Lanka, for example, try to invite businessmen and buyers to visit their country not just for business purposes but for tourism as well. This enables the buyers to view the country, its production processes and its market. Buyers can judge lead times and manufacturing costs by visiting the country and seeing an overview of what the country has to offer. In this regard, Pakistan should not only invite buyers but also develop its tourism industry. Make the country more appealing to foreigners like South East Asian countries have done. This will benefit Pakistan indirectly, such as future possible contracts and FDI which will help increase exports.

Pakistan also needs to implement structural changes to enhance export competitiveness. A significant portion of **Export Finance Scheme** should be made available to SMEs and new exporters. Large corporations should be encouraged to borrow from conventional sources, leaving EFS for SMEs and new exporters. The low borrowing rates would help finance the funding needs of these smaller exporters and improve overall export competitiveness.

**Lead times** are a big concern for foreign buyers. They want consistent lead times and Pakistan should look to upgrade their warehousing technology to improve reorder levels and keep inventory levels sufficient to cater to demand. **Improvements in warehousing technology** can lead to costs savings by maximizing available space in an optimum fashion. Other savings will include costs cut from keeping optimum inventory levels which will ensure sufficient quantity available for supply without excess inventory which leads to raising inventory holding costs. Several foreign and

local companies such as TCS, Abu Dawood and other foreign firms offer warehouse upgradation on a Build Operate Transfer model.

Exporters should also be made **aware of the country's Non-tariff requirements**. Compliance with non-tariff requirements is one of the biggest roadblocks for Pakistan's exporters. Lack of knowledge of the rules and requirements for exports to the target country lead to lower than potential exports. Exporters need to be made aware of non-tariff requirements before export to the target country. This report attempts to identify the non-tariff requirements for the top in-demand products recognized in the Canadian market. The non-tariff requirements for various other products are also detailed at the UNCTAD website (<https://trains.unctad.org>). Potential exporters can easily view the list of required non-tariff compliance measures and can decisions accordingly.

Pakistan also needs to **reduce its electricity tariffs**. The electricity tariff for Bangladesh is 7.3 cents per kilowatt hour versus Pakistan's 11 cents per kilowatt hour (Ahmed, 2017). This leads to lower production costs for Bangladesh as compared to Pakistan.

Utilizing the potential of CPEC, Pakistan should also look to **become part of the regional supply chain**. This will also help Pakistan move forward in the direction of becoming part of the global value chain. Local businesses should ask their Chinese counterparts to involve them in manufacturing parts and accessories as 3<sup>rd</sup> party contractors.

In order to increase exports, Pakistan will need to **focus on high-value Ready Made Garments (RMGs)** as opposed to low value RMGs and try to penetrate premium market segments. Pakistan should look to establish and cement its reputation as a superior manufacturer in surgical instruments, sports goods, medicaments, jerseys and food preparations. Pakistani industries should improve their image as being top quality suppliers, with consistent lead times and better customer service. The industries also need to position their image as innovators with improved execution, logistics and compliance with ethical standards. Pakistani business owners need to raise their core competencies in order to survive and expand. They should consider the existing system in their firms including logistics, finance, marketing, production, costs, price, and knowledge management in order to remain competitive.

To sum up, setting up an FTA to increase trade with Canada, an increase in the use of e-commerce platforms backed by high quality customer service, focus on high value added products, increase of foreign visits to Pakistan and structural changes identified will lead to export competitiveness in Pakistan. In addition, for exports to Canada, the products identified in this report are in high demand in the country; therefore, Pakistan should focus on increasing market share in these items as this will lead to higher exports towards Canada. The identified items are reiterated below for exporters' convenience:

1. HS 300490 Medicaments
2. HS 901890 Surgical Instruments
3. HS 611030 Jerseys, pullovers and Cardigans etc of MMF
4. HS 711319 Articles of jewelry of precious metals other than silver
5. HS 210690 Food preparations n.e.s.

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## APPENDIX 1

### Product wise Market Share in Canadian market

Existing and potential trade between Canada and Pakistan				
Unit : US Dollar Mn				
Product code	Product label	Canada's imports from Pakistan 2017	Canada's imports from world 2017	Market Share
'520513	Single cotton yarn, of uncombed fibres, containing >= 85% cotton by weight and with a linear ...	0.21	0.21	99.0%
'540341	Multiple "folded" or cabled filament yarn of viscose rayon, incl. monofilament of < 67 decitex ...	0.48	0.62	76.9%
'520532	Multiple "folded" or cabled cotton yarn, of uncombed fibres, containing >= 85% cotton by weight ...	0.05	0.07	72.9%
'551419	Woven fabrics containing predominantly, but < 85% synthetic staple fibres by weight, mixed ...	0.05	0.08	69.7%
'551421	Plain woven fabrics containing predominantly, but < 85% polyester staple fibres by weight, ...	0.22	0.36	60.7%
'521221	Woven fabrics of cotton, containing predominantly, but < 85% cotton by weight, other than those ...	0.05	0.08	57.7%
'410622	Hides and skins of goats or kids, in the dry state "crust", without wool on, whether or not ...	0.06	0.10	53.4%
'551412	Woven fabrics containing predominantly, but < 85% polyester staple fibres by weight, mixed ...	0.15	0.33	45.6%
'520822	Plain woven fabrics of cotton, containing >= 85% cotton by weight and weighing > 100 g to 200 ...	0.39	0.88	44.0%
'631090	Used or new rags, scrap twine, cordage, rope and cables and worn-out articles thereof, of textile ...	1.39	3.28	42.3%
'411310	Leather further prepared after tanning or crusting "incl. parchment-dressed leather", of goats ...	0.17	0.41	42.1%
'551312	Woven fabrics containing predominantly, but < 85% polyester staple fibres by weight, mixed ...	0.11	0.25	41.7%
'620412	Women's or girls' suits of cotton (excluding knitted or crocheted, ski overalls and swimwear)	0.40	1.00	40.3%
'631010	Used or new rags, scrap twine, cordage, rope and cables and worn-out articles thereof, of textile ...	1.10	2.78	39.7%
'521021	Plain woven fabrics of cotton, containing predominantly, but < 85% cotton by weight, mixed ...	0.07	0.19	39.2%
'091091	Mixtures of different types of spices	3.58	13.12	27.3%
'611212	Track-suits of synthetic fibres, knitted or crocheted	0.55	2.11	26.0%
'390769	Poly"ethylene terephthalate", in primary forms, having a viscosity number of < 78 ml/g	21.83	84.83	25.7%
'540781	Woven fabrics of yarn containing predominantly, but < 85% synthetic filament by weight, incl. ...	0.24	0.98	24.2%
'630221	Printed bedlinen of cotton (excluding knitted or crocheted)	12.20	50.72	24.0%
'580219	Terry towelling and similar woven terry fabrics, of cotton (excluding unbleached, narrow woven ...	0.13	0.55	23.6%
'420329	Gloves, mittens and mitts, of leather or composition leather (excluding special sports gloves)	21.54	93.07	23.1%
'520812	Plain woven fabrics of cotton, containing >= 85% cotton by weight and weighing > 100 g to 200 ...	0.31	1.37	22.3%
'630391	Curtains, incl. drapes, and interior blinds, curtain or bed valances of cotton (excluding knitted ...	2.35	11.45	20.5%
'551313	Woven fabrics containing predominantly, but < 85% polyester staple fibres by weight, mixed ...	0.03	0.15	20.5%
'521119	Woven fabrics of cotton, containing predominantly, but < 85% cotton by weight, mixed principally ...	0.01	0.07	20.0%
'420340	Clothing accessories of leather or composition leather (excluding gloves, mittens and mitts, ...	0.19	1.08	17.2%

'520943	Woven fabrics of cotton, containing $\geq$ 85% cotton by weight and weighing $> 200 \text{ g/m}^2$ , in three-thread ...	0.05	0.26	17.1%
'620799	Men's or boys' singlets and other vests, bathrobes and dressing gowns of textile materials ...	0.24	1.45	16.8%
'520919	Woven fabrics of cotton, containing $\geq$ 85% cotton by weight and weighing $> 200 \text{ g/m}^2$ , unbleached ...	0.14	0.84	16.6%
'570110	Carpets and other textile floor coverings, of wool or fine animal hair, knotted, whether or ...	2.70	16.76	16.1%
'551311	Plain woven fabrics containing predominantly, but $< 85\%$ polyester staple fibres by weight, ...	0.37	2.44	15.1%
'520839	Woven fabrics of cotton, containing $\geq$ 85% cotton by weight and weighing $\leq 200 \text{ g/m}^2$ , dyed ...	0.28	1.83	15.0%
'630130	Blankets and travelling rugs of cotton (excluding electric, table covers, bedspreads and articles ...	2.18	14.83	14.7%
'520921	Plain woven fabrics of cotton, containing $\geq$ 85% cotton by weight and weighing $> 200 \text{ g/m}^2$ , ...	0.03	0.17	14.5%
'551341	Plain woven fabrics containing predominantly, but $< 85\%$ polyester staple fibres by weight, ...	0.20	1.46	13.9%
'410419	Hides and skins of bovine "incl. buffalo" or equine animals, in the wet state "incl. wet-blue", ...	0.03	0.21	13.6%
'551323	Woven fabrics containing predominantly, but $< 85\%$ polyester staple fibres by weight, mixed ...	0.12	0.92	13.2%
'611211	Track-suits of cotton, knitted or crocheted	0.07	0.54	12.9%
'520514	Single cotton yarn, of uncombed fibres, containing $\geq$ 85% cotton by weight and with a linear ...	0.01	0.04	12.5%
'630231	Bedlinen of cotton (excluding printed, knitted or crocheted)	16.15	134.82	12.0%
'420310	Articles of apparel, of leather or composition leather (excluding clothing accessories, footwear ...	5.80	49.78	11.7%
'551442	Woven fabrics containing predominantly, but $< 85\%$ polyester staple fibres by weight, mixed ...	0.02	0.18	11.6%
'610339	Men's or boys' jackets and blazers of textile materials (excluding of wool, fine animal hair, ...	0.14	1.20	11.4%
'611692	Gloves, mittens and mitts, of cotton, knitted or crocheted (excluding impregnated, coated or ...	1.57	14.39	10.9%
'520911	Plain woven fabrics of cotton, containing $\geq$ 85% cotton by weight and weighing $> 200 \text{ g/m}^2$ , ...	0.14	1.44	10.0%

## APPENDIX 2

### Tariffs

#### HS 300490 Medicaments

Tariff Item	Description	unit of measurement	MFN tariff	Applicable preferential tariff
3004.90.00	Other		Free	CCCT, LDCT, GPT, UST, MT, MUST, CIAT, CT, CRT, IT, NT, SLT, PT, COLT, JT, PAT, HNT, KRT, CEUT, UAT: Free
	Mixtures of amino acids and mixtures of amino acids and protein hydrolysates, whether or not containing added minerals, fats or carbohydrates, specially compounded for persons afflicted with amino acid disorders; Liver extracts, pituitary extracts, onated soya oil emulsions, dextrose (glucose) solutions and levulose (fructose) solutions, prepared for parenteral administration:			
3004.90.00.11	Amino acids	-		
3004.90.00.12	Dextrose (glucose) and levulose (fructose) solutions	-		
3004.90.00.19	Other	-		
	Other, for human use, acting on the nervous system:			
3004.90.00.21	Containing cannabis or cannabinoids	KGM		
3004.90.00.22	Analgesics	KGM		
3004.90.00.23	Antidepressants and tranquilizers	KGM		
3004.90.00.24	Antihypertensive agents	KGM		
3004.90.00.25	Antihistaminic agents	KGM		
3004.90.00.26	Other agents, acting on the central nervous system	KGM		
3004.90.00.27	Local anaesthetics	KGM		
3004.90.00.29	Other	KGM		
	Other, for human use, gastrointestinal agents:			
3004.90.00.42	Laxatives	KGM		
3004.90.00.43	Antacids	KGM		
3004.90.00.49	Other	KGM		
3004.90.00.50	Other, for human use, acting on the cardiovascular system	KGM		
	Other, for human use, anti-infective agents:			
3004.90.00.61	Containing sulfonamides	KGM		
3004.90.00.69	Other	KGM		
	Other, for human use:			
3004.90.00.71	Haematological agents	KGM		
3004.90.00.72	Antineoplastic agents	KGM		
3004.90.00.73	Cough or cold preparations	KGM		
3004.90.00.74	Primarily affecting the eyes, ears or respiratory system	KGM		

3004.90.00.75	Diuretics	KGM		
3004.90.00.76	Primarily affecting electrolytic, caloric or water balance	KGM		
3004.90.00.77	Dermatological agents	KGM		
3004.90.00.78	Containing hyaluronic acid or its sodium salt	KGM		
3004.90.00.79	Other	KGM		
3004.90.00.90	Other	KGM		

(Canada Border Services Agency, 2018)

### HS 611030 Jerseys, Pullovers, Cardigans etc. of MMF

Tariff Item	Description	unit of measurement	MFN tariff	Applicable preferential tariff
6110.30.00	Jerseys, Pullover, Cardigans of Man-Made Fibers		18%	LDCT, UST, MT, CIAT, CT, CRT, IT, NT, SLT, PT, COLT, JT, PAT, HNT, KRT, CEUT, UAT: Free AUT: 11% NZT: 11%
	Of acrylic or modacrylic:			
6110.30.11	Men's or boys'	per unit		
6110.30.12	Women's or girls'	per unit		
	Other, brushed or fleeced:			
6110.30.71	Men's or boys'	per unit		
6110.30.72	Women's or girls'	per unit		
	Other, containing spandex (elasthane):			
6110.30.81	Men's or boys'	per unit		
6110.30.82	Women's or girls'	per unit		
	Other:			
6110.30.91	Men's or boys'	per unit		
6110.30.92	Women's or girls'	per unit		

(Canada Border Services Agency, 2018)

### HS 711319 Articles of Jewelry other than silver

Tariff Item	Description	unit of measurement	MFN tariff	Applicable preferential tariff
7113.19	Articles of jewelry and parts thereof, of precious metal other than silver			
7113.19.10.00	Findings, not plated or clad	-	5%	CCCT, LDCT, GPT, UST, MT, MUST, CIAT, CT, CRT, IT, NT, SLT, PT, COLT, JT, PAT, HNT, KRT, CEUT, UAT: Free
7113.19.90.00	Other	-	6.50%	CCCT, LDCT, UST, MT, MUST, CIAT, CT, CRT, IT, NT, SLT, PT, COLT, JT, PAT, HNT, KRT, CEUT, UAT: Free GPT: 5%

## HS 210690 Food Preparations

Tariff Item	Description	unit of measurement	MFN tariff	Applicable preferential tariff
2106.90	Food Preparations n.e.s.			
2106.90.10	Chewing gum, containing 2 mg or more of nicotine; Cream of coconut syrup for use in the manufacture of beverages; Elderberry flower concentrate and Limeflower concentrate for use in the manufacture of beverages; Nutmeat substitutes; Sour dough flavouring ingredients; Tea substitutes; Vegetable preparations for use as flavouring		Free	CCCT, LDCT, GPT, UST, MT, CIAT, CT, CRT, IT, NT, SLT, PT, COLT, JT, PAT, HNT, KRT, CEUT, UAT: Free
2106.90.10.10	Chewing gum, containing 2 mg or more of nicotine	kg		
2106.90.10.40	Tea substitutes	kg		
2106.90.10.50	Vegetable preparations for use as flavouring	kg		
2106.90.10.90	Other	kg		
	Syrups derived from cane or beet sugar, containing added colouring matter; Food concentrates and fruit syrups for use in beverages or other food preparations:			
2106.90.21.00	Syrups derived from cane or beet sugar, containing, in the dry state, 90% or more by weight of sugar and no added flavouring matter	kg	6%	CCCT, LDCT, UST, CIAT, CT, CRT, IT, NT, SLT, PT, COLT, JT, PAT, HNT, KRT, CEUT, UAT: Free MT: 6%
2106.90.29	Other			
2106.90.29.10	Food concentrates and fruit syrups, for use in beverages or other food preparations	kg		
2106.90.29.90	Other	kg		
	Milk, cream or butter substitutes and preparations suitable for use as butter substitutes:			
2106.90.31.00	Milk, cream or butter substitutes, containing 50% or more by weight of dairy content, within access commitment	kg	5%	CCCT, LDCT, UST, CT, CRT, IT, NT, SLT, PT, COLT, JT, PAT, HNT, CEUT, UAT: Free GPT: 5%
2106.90.32.00	Milk, cream or butter substitutes, containing 50% or more by weight of dairy content, over access commitment	kg	212% but not less than \$2.11 /kg	
2106.90.33.00	Preparations, containing more than 15% by weight of milk fat but less than 50% by weight of dairy content, suitable for use as butter substitutes, within access commitment	kg	5%	CCCT, LDCT, UST, MT, CT, CRT, IT, NT, SLT, PT, COLT, JT, PAT, HNT, CEUT, UAT:

				Free GPT: 5%
2106.90.34.00	Preparations, containing more than 15% by weight of milk fat but less than 50% by weight of dairy content, suitable for use as butter substitutes, over access commitment	kg	212% but not less than \$2.11 /kg	
2106.90.35.00	Milk or cream substitutes, containing, in the dry state, over 10% by weight of milk solids but less than 50% by weight of dairy content, and butter substitutes, containing, in the dry state, over 10% by weight of milk solids but 15% or less by weight of milk fat	kg	8%	CCCT, LDCT, UST, MT, CT, CRT, IT, NT, SLT, PT, COLT, JT, PAT, HNT, KRT, CEUT, UAT: Free GPT: 5%
2106.90.39	Other		8%	CCCT, LDCT, UST, MT, CT, CRT, IT, NT, SLT, PT, COLT, JT, PAT, HNT, KRT, CEUT, UAT: Free GPT: 5%
2106.90.39.10	Cream substitutes, whipped	kg		
2106.90.39.20	Coffee whitener	kg		
2106.90.39.90	Other	kg		
	Cheese fondue; Popping corn, prepared and packaged for use with microwave ovens; Protein hydrolysates:			
2106.90.41	Cheese fondue; Popping corn, prepared and packaged for use with microwave ovens		6%	CCCT, LDCT, UST, MT, CT, CRT, SLT, PT, COLT, JT, PAT, HNT, KRT, CEUT, UAT: Free GPT: 5%
2106.90.41.10	Cheese fondue	kg		
2106.90.41.20	Popping corn, prepared and packaged for use with microwave ovens	kg		
2106.90.42.00	Protein hydrolysates	kg	6%	CCCT, LDCT, UST, MT, CIAT, CT, CRT, SLT, PT, COLT, JT, PAT, HNT, KRT, CEUT, UAT: Free GPT: 5%
	Egg preparations:			
2106.90.51.00	Within access commitment	kg	6.68¢ /kg	CCCT, LDCT, UST, CT, CRT, PT, COLT, JT, PAT, CEUT, UAT: Free HNT: 1.9¢/kg
2106.90.52.00	Over access commitment	kg	\$1.45 /kg	

	Other:			
2106.90.91.00	Concentrated juice of any single fruit or vegetable, fortified with vitamins or minerals	ltr	free	AUT, NZT, CCCT, LDCT, GPT, UST, MT, CIAT, CT, CRT, IT, NT, SLT, PT, COLT, JT, PAT, HNT, KRT, CEUT, UAT: Free
2106.90.92.00	Concentrated mixtures of fruit or vegetable juices, fortified with vitamins or minerals	ltr	free	AUT, NZT, CCCT, LDCT, GPT, UST, MT, CT, CRT, IT, NT, SLT, PT, COLT, JT, PAT, HNT, KRT, CEUT, UAT: Free
2106.90.93.00	Containing 50% or more by weight of dairy content, within access commitment	kg	7%	CCCT, LDCT, UST, CT, CRT, PT, COLT, JT, PAT, HNT, CEUT, UAT: Free GPT: 7%
2106.90.94.00	Containing 50% or more by weight of dairy content, over access commitment	kg		274.5% but not less than \$2.88/kg
2106.90.95	Other preparations, containing, in the dry state, over 10% by weight of milk solids but less than 50% by weight of dairy content		8%	CCCT, LDCT, UST, MT, CT, CRT, PT, COLT, JT, PAT, HNT, KRT, CEUT, UAT: Free GPT: 5%
2106.90.95.10	Butter oil and sugar blends	kg		
2106.90.95.90	Other	kg		
2106.90.96.00	Compound alcoholic preparations, not based on one or more odoriferous substances, with an alcoholic strength exceeding 0.5% by volume, for use in the manufacture of beverages	ltr	free	CCCT, LDCT, GPT, UST, MT, CIAT, CT, CRT, IT, NT, SLT, PT, COLT, JT, PAT, HNT, KRT, CEUT, UAT: Free
2106.90.97.00	Fruit flavoured powders for use in the manufacture of pharmaceuticals, food products or beverages	kg	free	AUT, NZT, CCCT, LDCT, GPT, UST, MT, CIAT, CT, CRT, PT, COLT, JT, PAT, HNT, KRT, CEUT, UAT: Free
2106.90.98.00	Jelly powders, ice cream powders and powders for similar preparations	kg	free	AUT, NZT, CCCT, LDCT, GPT, UST, MT, CT, CRT, IT, NT, SLT, PT, COLT, JT, PAT, HNT, KRT, CEUT, UAT: Free

2106.90.99	Other		10.50 %	CCCT, LDCT, UST, MT, CIAT, CT, CRT, IT, NT, SLT, PT, COLT, JT, PAT, HNT, CEUT, UAT: Free AUT: 8% NZT: 8% GPT: 5% KRT: 2%
2106.90.99.10	Flavouring powders	kg		
	Sweets, gums and the like, containing synthetic sweetening agents:			
2106.90.99.31	Chewing gum	kg		
2106.90.99.39	Other	kg		
2106.90.99.40	Flavouring extracts and essences	kg		
	Other:			
2106.90.99.91	Frozen	kg		
2106.90.99.92	Not frozen, in airtight containers	kg		
2106.90.99.99	Other	kg		
(Canada Border Services Agency, 2018)				

## APPENDIX 3

### Free Trade Agreements

Country	Agreement Title	Agreement Type	Status	In force
Argentina	Canada-Argentina Foreign Investment Promotion and Protection Agreement	FIPA	In force	29-04-93
Armenia	Canada-Armenia Foreign Investment Promotion and Protection Agreement	FIPA	In force	29-03-99
Barbados	Canada-Barbados Foreign Investment Promotion and Protection Agreement	FIPA	In force	17-01-97
Benin	Canada-Benin Foreign Investment Promotion and Protection Agreement	FIPA	In force	12-05-14
Burkina Faso	Canada-Burkina Faso Foreign Investment Promotion and Protection Agreement	FIPA	In force	11-10-17
Cameroon	Canada-Cameroon Foreign Investment Promotion and Protection Agreement	FIPA	In force	16-12-16
Chile	Canada-Chile Free Trade Agreement	FTA	In force	05-07-97
China	Canada-China Foreign Investment Promotion and Protection Agreement Negotiations	FIPA	In force	01-10-14
Colombia	Canada-Colombia Free Trade Agreement	FTA	In force	15-08-11
Costa Rica	Canada-Costa Rica Free Trade Agreement	FTA	In force	01-11-02
Costa Rica	Canada-Costa Rica Foreign Investment Promotion and Protection Agreement	FIPA	In force	29-09-99
Côte d'Ivoire	Canada-Côte d'Ivoire Foreign Investment Promotion and Protection Agreement	FIPA	In force	14-12-15
Croatia	Canada-Croatia Foreign Investment Promotion and Protection Agreement	FIPA	In force	30-01-01
Czech Republic	Canada-Czech Republic Foreign Investment Promotion and Protection Agreement	FIPA	In force	22-01-12
Ecuador	Canada-Ecuador Foreign Investment Promotion and Protection Agreement	FIPA	In force	06-06-97
Egypt	Canada-Egypt Foreign Investment Promotion and Protection Agreement	FIPA	In force	03-11-97
European Free Trade Association (EFTA):	Canada-European Free Trade Association (EFTA) Free Trade Agreement	FTA	In force	01-07-09
European Union (EU):	Canada-European Union: Comprehensive Economic and Trade Agreement (CETA)	FTA	In force	21-09-17
Guinea	Canada-Guinea Foreign Investment Promotion and Protection Agreement	FIPA	In force	27-03-17
Honduras	Canada-Honduras Free Trade Agreement	FTA	In force	01-10-14
Hong Kong	Canada-Hong Kong Foreign Investment Promotion and Protection Agreement	FIPA	In force	06-09-16
Hungary	Canada-Hungary Foreign Investment Promotion and Protection Agreement	FIPA	In force	21-11-93
Israel	Canada-Israel Free Trade Agreement (CIFTA)	FTA	In force	01-01-97
Jordan	Canada-Jordan Free Trade Agreement	FTA	In force	01-10-12
Jordan	Canada-Jordan Foreign Investment Promotion and Protection Agreement	FIPA	In force	14-12-09
Korea	Canada-Korea Free Trade Agreement (CKFTA)	FTA	In force	01-01-15
Kuwait	Canada-Kuwait Foreign Investment Promotion and Protection Agreement	FIPA	In force	19-02-14
Latvia	Canada-Latvia Foreign Investment Promotion and Protection Agreement	FIPA	In force	24-11-11
Lebanon	Canada-Lebanon Foreign Investment Promotion and Protection Agreement	FIPA	In force	19-06-99

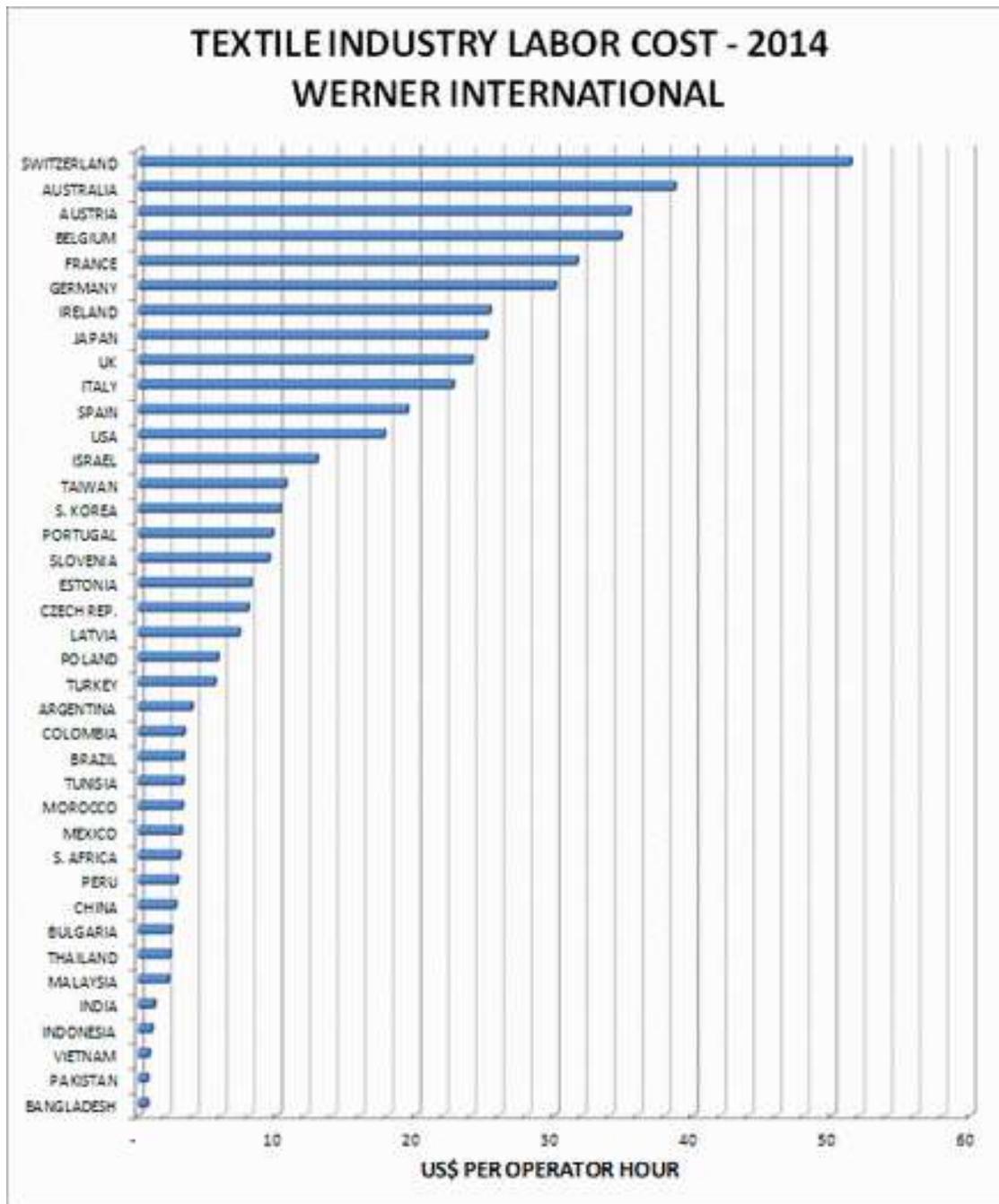
Mali	Canada-Mali Foreign Investment Promotion and Protection Agreement	FIPA	In force	08-06-16
Mongolia	Canada-Mongolia Foreign Investment Promotion and Protection Agreement	FIPA	In force	24-02-17
North America:	North American Free Trade Agreement (NAFTA)	FTA	In force	01-01-94
Panama	Canada-Panama Free Trade Agreement	FTA	In force	01-04-13
Panama	Canada-Panama Foreign Investment Promotion and Protection Agreement	FIPA	In force	13-02-98
Peru	Canada-Peru Free Trade Agreement	FTA	In force	01-08-09
Peru	Canada-Peru Foreign Investment Promotion and Protection Agreement	FIPA	In force	20-06-07
Philippines	Canada-Philippines Foreign Investment Promotion and Protection Agreement	FIPA	In force	13-11-96
Poland	Canada-Poland Foreign Investment Promotion and Protection Agreement	FIPA	In force	22-11-90
Romania	Canada-Romania Foreign Investment Promotion and Protection Agreement	FIPA	In force	23-11-11
Russian Federation	Canada-Russian Federation Foreign Investment Promotion and Protection Agreement	FIPA	In force	27-06-91
Senegal	Canada-Senegal Republic Foreign Investment Promotion and Protection Agreement	FIPA	In force	05-08-16
Serbia	Canada-Serbia Republic Foreign Investment Promotion and Protection Agreement	FIPA	In force	27-04-15
Slovak Republic	Canada-Slovak Republic Foreign Investment Promotion and Protection Agreement	FIPA	In force	14-03-12
Tanzania	Canada-Tanzania Foreign Investment Promotion and Protection Agreement	FIPA	In force	09-12-13
Thailand	Canada-Thailand Foreign Investment Promotion and Protection Agreement	FIPA	In force	24-09-98
Trinidad and Tobago	Canada-Trinidad and Tobago Foreign Investment Promotion and Protection Agreement	FIPA	In force	08-07-96
Ukraine	Canada-Ukraine Free Trade Agreement (CUFTA)	FTA	In force	01-08-17
Ukraine	Canada-Ukraine Foreign Investment Promotion and Protection Agreement	FIPA	In force	24-07-95
United States of America	Canada-U.S. Free Trade Agreement (CUSFTA)	FTA	In force	01-01-89
Uruguay	Canada-Uruguay Foreign Investment Promotion and Protection Agreement	FIPA	In force	02-06-99
Venezuela	Canada-Venezuela Foreign Investment Promotion and Protection Agreement	FIPA	In force	28-01-98
World Trade Organization (WTO):	World Trade Organization Agreement on Trade Facilitation (TFA)	WTO agreement	In force	22-02-17
World Trade Organization (WTO):	Agreement on Trade-Related Aspects of Intellectual Property Rights (TRIPS)	WTO agreement	In force	01-01-95
World Trade Organization (WTO):	Agreement on Trade-related Investment Measures (TRIMS)	WTO agreement	In force	01-01-95
World Trade Organization (WTO):	General Agreement on Tariffs and Trade 1994 (GATT)	WTO agreement	In force	01-01-95
World Trade Organization (WTO):	General Agreement on Trade in Services (GATS)	WTO agreement	In force	01-01-95
World Trade Organization (WTO):	World Trade Organization Information Technology Agreement (ITA)	WTO agreement	In force	01-07-16
World Trade Organization (WTO):	World Trade Organization Agreement on Government Procurement (GPA)	WTO agreement	In force	2014-0

FIPA: Foreign investment promotion and protection agreements

FTA: Free trade agreements

## APPENDIX 4

### Textile Industry Labor Costs



	US\$/HOUR	RATIO US=100
SWITZERLAND	51,36	290
AUSTRALIA	38,67	218
AUSTRIA	35,42	200
BELGIUM	34,77	196
FRANCE	31,61	179
GERMANY	30,03	170
IRELAND	25,33	143
JAPAN	25,10	142
UK	24,01	136
ITALY	22,67	128
SPAIN	19,37	109
USA	17,71	100
ISRAEL	12,86	73
TAIWAN	10,61	60
S. KOREA	10,22	58
PORTUGAL	9,64	54
SLOVENIA	9,39	53
ESTONIA	8,09	46
CZECH REP.	7,89	45
LATVIA	7,25	41
POLAND	5,70	32
TURKEY	5,48	31
ARGENTINA	3,82	22
COLOMBIA	3,27	18
BRAZIL	3,22	18
TUNISIA	3,18	18
MOROCCO	3,12	18
MEXICO	3,06	17
S. AFRICA	2,94	17
PERU	2,78	16
CHINA	2,65	15
BULGARIA	2,33	13
THAILAND	2,26	13
MALAYSIA	2,12	12
INDIA	1,12	6
INDONESIA	0,95	5
VIETNAM	0,74	4
PAKISTAN	0,62	4
BANGLADESH	0,62	3