

Report to the
Asia Pacific Trade Council

*British Columbia
and Taiwan*

**OPPORTUNITIES AND STRATEGIES
TO INCREASE
TRADE AND INVESTMENT**

May 2007

Note:

This discussion paper, prepared by Dunedin Group Ltd., was commissioned by the Asia Pacific Trade Council to focus on trade and investment related issues, opportunities and challenges for British Columbia in the Taiwan market. Opinions and comments expressed in the discussion paper are strictly that of Dunedin Group Ltd., and do not represent the position of the Province of British Columbia and/or the Asia Pacific Trade Council.

Foreword

As the global demand for foreign direct investments (FDI) grows and the competition intensifies for technology and resource markets, British Columbia's "Asia Pacific Initiative" offers BC businesses an excellent platform to enter the Pacific Century and lead the Province in becoming Canada's gateway to Asia Pacific. As British Columbia is an economy dependent upon investment and exports for growth and prosperity, the Initiative's objectives to further promote British Columbia as a destination of choice for business activities and a preferred trade and investment partner for the Asia Pacific economies are strategic and timely.

Further, the Initiative's strategies to build a global identity, strengthen existing business relationships, and position the Province to become North America's hub to the Asia Pacific region are sound and bode well for the Province and British Columbians across the Province.

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1.0 Taiwan Economic Outlook

Taiwan is now the world's 14th largest trading market and with approximately US\$267.5 billion in foreign exchange reserves is ranked third globally. Taiwan's total trade increased from US\$381 billion in 2005 to US\$427 billion in 2006. During that period, exports and imports registered growth rates of 13% and 11% respectively.

In 2005, Taiwan's GDP increased by 4.1 per cent to US\$305.4 billion, of which 29.5 percent was contributed by the industrial sector and only 1.7 per cent by agriculture. The service sector, which has generated more than 50 per cent of Taiwan's Gross Domestic Product (GDP) since 1988, accounted for 68.7 per cent of the GDP in 2004. In 2007, Taiwan's GDP growth is expected to continue at a healthy level of between 4 to 4.6%.

As Taiwan's economy continues to grow, domestic demand has also improved, increasing to 5.1 percent from 5.0 per cent the same time last year. Taiwan's unemployment rate has continued a downward trend, reaching less than 3.8% in January and February of 2007, and achieving its lowest level in six years.

Forecasts are on the whole positive regarding Taiwan's economic prospects in the coming year. Taiwan's Directorate General of Budget, Accounting and Statistics has forecast an economic growth rate of approximately 4% for 2007, and other economic indicators remain sound. The continued health of Taiwan's economy should ensure the further development and growth of its technology-based industries.

2.0 Cross-Strait Economic Relations

Cross-strait economic activity between Taiwan and China has expanded rapidly in recent years following both sides being admitted to the World Trade Organization (WTO) in 2002. Investment by Taiwan businesses in China has also increased since the easing of restrictions in the early 90s. In 2005, the Taiwan listed 'approved' investments at over US\$47 billion, accounting for over 50% percent of Taiwan's total outward 'approved' investments. Unofficial estimates put Taiwan's originated business investments in China at over US\$100 billion. In 2005 alone, Taiwanese 'approved' investments in China numbered approximately 1300 cases, with an attached official value of US\$6 billion, representing over 70% of Taiwan's approved outward investment for that year.

Cross-strait trade has also grown significantly since the early 90s, increasing from just US\$8 billion in 1991 to US\$108 billion in 2006, with exports to China accounting for US\$82 billion of the total. In the first four months of 2007 total trade is up over 9% from the same period last year. As a result, China is currently Taiwan's largest trade partner and number one destination for Taiwan exports. Trade with China continues to account for the largest share of Taiwan's trade surplus.

3.0 Canada - Taiwan Bilateral Economic Relations

In 2006, Taiwan was Canada's 15th largest export market. During the same period Taiwan was Canada's 12th largest trading partner in terms of Canadian imports for consumption. In 2006, merchandise trade between Canada and Taiwan amounted to US\$3.14 billion, showing an increase of over 4.3% from the previous year. Canadian consumable exports to Taiwan in 2006 totaled US\$1.37 billion. For the first two months of 2007, overall trade between Canada and Taiwan has increased over 14%. During that period, Canadian exports to Taiwan have increased over 12% in excess of US\$230 million.

Canadian multinational corporations, including ATI, Bombardier, Manulife, McCains, Nortel and Scotiabank, as well as hundreds of small-medium enterprises (SME) enjoy success in the Taiwan market. Although two-way investment to date has not been large, there has been a steady flow of investment prospects from Taiwan and largely from its vibrant SME sector.

A good example of the close economic ties between Canada and Taiwan is the National Research Council's cooperation with Taiwan's science council. The current agreement between the councils represents Canada's largest bi-lateral agreement outside of North America. This agreement is reaching its tenth year and will be re-signed in November 2007 in recognition of this milestone.

The Canadian government office in Taiwan, the Canadian Trade Office (CTOT), is in the process of aggressively pursuing more bilateral relations amongst key industry sectors in Taiwan. In the Fall of 2007, there will be a number of activities undertaken by the CTOT which will act as instruments for the future facilitation of increased economic relations between Canada and Taiwan. Activities planned will include events related to S&T, ICT, advanced manufacturing, environmental technologies and the convening of closer bilateral commercial consultations.

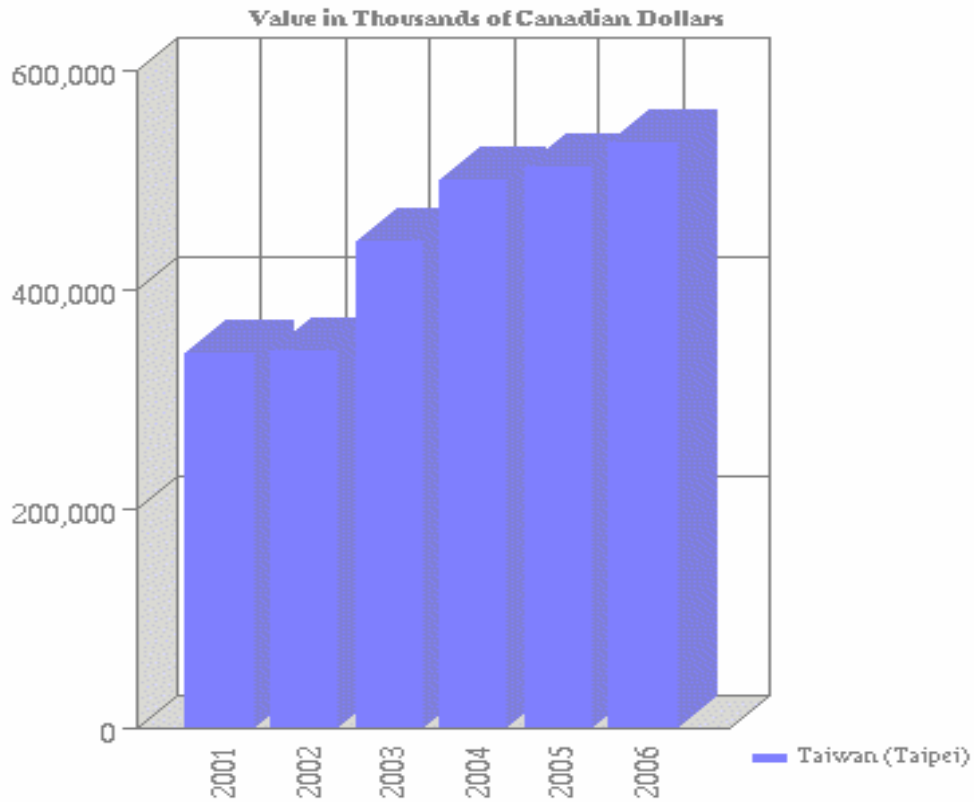
In the coming year the CTOT's activities will closely mirror the objectives of the Asia Pacific Initiative (API) to brand a more advanced identity for Canada in the Taiwan market place.

4.0 Taiwan - British Columbia Economic Overview

Economic relations between British Columbia and Taiwan remain strong. Taiwan investment dollars continue to move into the province for economic and regional development with a focus towards technology, agriculture and tourism. From 2004 until today, Taiwan has maintained its position as British Columbia's fifth largest export market following only the US, Japan, China and South Korea. BC exports accounted for C\$535 million of Canada's total exports to Taiwan in 2006. In fact, BC originated exports to Taiwan accounted for over 92% of the combined total exports of Canada's next three top exporting provinces to Taiwan (Ontario 217 million; Quebec 188 million; Alberta 170 million). BC exports also accounted for the largest piece of Canada's exports to Taiwan, with over 41% of Canada's total exports originating in BC.

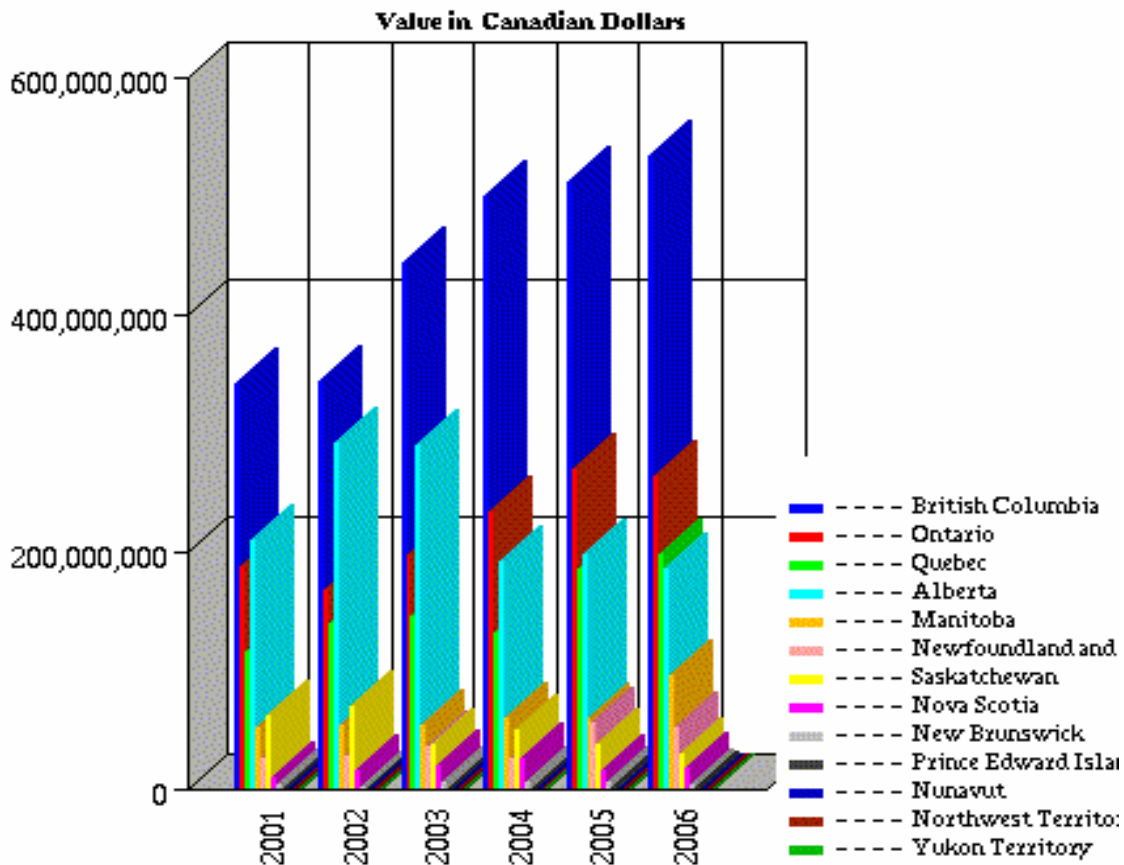
The province continues to be a destination of choice for well over half of Taiwan's international students (approximately 60%) and tourists (approximately 95%) studying and traveling to Canada. In fact, Taiwan has become one of BC's largest sources of fee paying international students, accounting for over 16% of the province's total international student population. Taiwan students contributed upwards of C\$200 million a year in revenues to the province in 2002, with the numbers trending upwards again following the substantial falloff caused by SARS in 2003. Taiwan outbound tourism continues to see BC as an attractive destination, with over 70,000 Taiwan overnight visitors coming to the province and putting approximately C\$100 million into the local economy in 2005.

BC Exports to Taiwan – Past 5 Years



KavaChart Servlets from VE.com

Canadian Provincial Exports to Taiwan – Past 5 years



KavaChart Servlets from VE.com

5.0 Overview of British Columbia Export Activity to Taiwan

As reported, in 2006 British Columbia's exports to Taiwan were the largest of any province in Canada with over 41% of Canada's total exports originating in BC. BC originated exports to Taiwan were 32% larger than Canada's second and third exporting provinces of Ontario and Quebec combined. The province's relative strength in exports to Taiwan further stresses the significance of the economic linkages versus the rest of Canada.

In 2004, the major BC export items to Taiwan comprised of C\$96 million for wood pulp; C\$73 million for agri-food products (hides, salmon, ginseng cherries, seafood, preparations); C\$65 million for lumber and processed wood products; C\$62 million for coal; C\$57 million for newsprint & fine paper; and C\$40 million for electrical products (power supplies, batteries, IC).

During the same period, British Columbia's pulp and paper related exports to Taiwan surpassed C\$150 million and were significantly higher than any other Canadian province. Lumber exports were the fourth largest export to Taiwan reaching a 5-year high of almost C\$60 million. For the year, Taiwan lumber imports from BC continued to outpace both China and South Korea.

Food exports from British Columbia showed a significant increase between 2003 and 2004. Agri-food product exports to Taiwan reached over C\$70 million and for the first time the province ranked a close second only to Alberta. British Columbia also had the distinction of being Canada's largest exporter of beverages, with exports exceeding C\$3 million. The growth in beverage sales can be attributed to increased sales of high profile products such as BC ice wine and beer. Over the past 5 years, Ontario and BC have been the largest beverage exporters to Taiwan; however, today it appears as though BC is winning the war of the Canadian ice wines.

British Columbia led all other Canadian provinces in mining exports with a 5-year average of \$48 million to Taiwan. The province was also Canada's largest provincial exporter of electronic machinery and equipment to Taiwan. This ranking was a first for BC as exports in the sector totaled almost C\$40 million.

6.0 Taiwan Investment Activity in British Columbia

Taiwanese investment in British Columbia has been modest to date with China, Southeast Asia and the U.S. being the major recipients of Taiwanese outward investment. At the same time, Taiwan's cumulative direct investment in Canada has averaged slightly more than \$100 million a year since 2001. This figure may be somewhat misleading as Statistics Canada figures capture a limited portion of actual capital flows and do not include investment inflows from Taiwanese investing through a third jurisdictions such as the United States or Hong Kong.

Taiwan's most sizeable investment in British Columbia in recent years is likely E-One Moli's lithium-ion battery production plant in Maple Ridge. Other smaller recent investments include investments in the agriculture, tourism and high technology sectors. For the most part, Taiwanese companies do not necessarily identify British Columbia as the low-cost, efficient, back-door to the USA market that it is. Those that do see the advantages of investing in BC generally do pursue a strategy as described in this report.

The above said, there is a growing appreciation amongst Taiwan's high-tech and advanced manufacturing industry that British Columbia offers an attractive climate for investment in both R&D and manufacturing. Examples of this include negotiations between Taiwan's electronics and design firms and local BC interests to commercialize new technologies and to create a new R&D centre respectively. Additionally, the province is now beginning to win recognition as a location rich with advanced technology start-ups and at lower valuations than US counterparts with similar technologies. As a result, Taiwanese venture capital (VC) is becoming available for the financing of small British Columbia technology SMEs and, in particular, those found in the biotechnology sector as evidenced by recent investments from the Taiwan VC community.

Examples of Taiwan investment in British Columbia include Pacgen Bio, Viva Pharmaceuticals, Sunmore Healthtech, Natural Glacier Water, Cancap Pharmaceuticals, Nicer Technologies, and Dynamotive Energy Systems. These companies represent a cross section of Taiwanese investment in British Columbia and are good examples of the diverse and strategic nature of Taiwanese investment in the province.

7.0 Priority Sectors & Opportunities in Taiwan

The priorities sectors and opportunities for Taiwan will for the most part closely mirror BC's target sectors in the rest of the region. Those presented here are either traditional sectors with established markets with further growth prospects or emerging technology driven sectors with growing networks. Both groups offer immediate synergies for BC and Taiwan and the potential for immediate growth and success. Further, the sectors covered here closely follow the API objectives to enhance BC's existing business relationships and develop new partnerships for emerging opportunities.

7.1 Information & Communication Technologies

One particular area that British Columbia companies could more fully exploit in Taiwan is the information and communications technologies (ICT) sector. In March 2005, Internet World Stats reported that there were 12,200,000 Internet users in Taiwan representing 53.5% of the population the vast majority of which are broadband users. Taiwan's massive broadband utilization and the popularity of on-line games, on-line shopping, on-line learning and on-line music have stimulated demand for networking services. Further, as Taiwan's broadband and wireless communications infrastructure projects move toward completion, and payment, data protection and regulatory mechanisms are put in place, Taiwan's digital content sector will experience even higher growth potential. Areas marked for added expansion include digital animation and film; digital video and audio applications; mobile applications and services; e-learning; and digital publishing and archiving.

Taiwan is also encouraging ICT demand and development as a key component of its development plan "Challenge 2008". One of the central elements of this plan is to establish Taiwan as the key location in Asia for advanced ICT manufacturing and R&D. The strategy to achieve its ICT objectives is set out in its Digital Content Industry Promotion Plan (DCIPP). With the evolution and convergence of communications and media technologies, Taiwan is actively promoting ICT initiatives to spur the development of its digital content industry. Valued at C\$7 billion in 2002, Taiwan's digital content industry is expected to double and reach a target of over C\$14 billion in 2007. In 2002, Taiwan had more than 1,700 digital content companies and 33,000 employed, and those figures were expected to grow to more than 3,000 companies with over 70,000 employed by 2007.

In comparison, British Columbia's ICT sector, now led by the Province's two established ICT clusters of 'New Media BC' and 'Wireless Innovation Network BC' (WINBC), averaged 7.5% growth and expanded from \$3.8 billion to more than \$5.4 billion from 1997 to 2002. As such, the province's ICT sector appears well suited to take advantage of Taiwan's rapidly expanding market opportunities as software accounts for upwards of 80% of BC's total ICT business and Taiwan relies heavily upon imported software for its industry's development. Further, BC's new media sector is focused on the development of content and enabling software, and like Taiwan, the primary applications targeted include digital animation and film; e-commerce; e-learning; games; development/publishing, streaming media, visual effects and post-production. In 2007, we are increasingly seeing evidence of this with more BC companies in this area becoming active in the marketplace.

Today, the primary Taiwan targets for British Columbia ICT companies remain game software developers, Internet service providers, and mobile operators. In addition, the demand for business application software for small-medium enterprises is increasing while information security-related issues in Taiwan are reinforcing the demand for security-related software. An important consideration for many British Columbia companies active in Taiwan is its mature intellectual property rights (IPR) and legal environment, which protects the rights of developers, copyright owners and investors.

While a number of BC companies are taking advantage of the opportunities in Taiwan, additional opportunities do exist for British Columbia companies both in Taiwan and the region. British Columbia companies should be aware that Taiwan offers significant cultural advantages in the development and production of games, film, software and other digital content products and services for the China and Asia-Pacific markets. Further, the high penetration of internet, broadband, and mobile communications services, combined with its distinct cultural demographics, make Taiwan an excellent testing ground and launching pad for digital content products and services destined for China and the Asia-Pacific region.

BC companies interested in accessing China should consider exploring joint venture opportunities with Taiwan companies that have established relationships with China. Due to the integrated nature of the regional ICT market, BC companies active in Taiwan should find it much easier to access all the regional marketplaces in Asia including China. Further, in line with, and under the auspices of the API, the two primary BC industry networks of New Media and WINBC should provide excellent platforms to speed up the process and assist BC achieve its overall objectives.

Finally, significant opportunities also exist for attracting Taiwan ICT investment into BC in particular the area of integrated chip (IC) design. With a shortage of top engineers in this sector in Taiwan, and the resulting competition amongst the industry players, BC is quietly emerging not only as a source of cutting edge technology, but also as a destination to locate and retain top developers. Four parts of the API's five key strategies are clearly evident in this one scenario, and as such further reinforces the ideal that clear linkages exist between the necessity to combine a global identity with investment, trade, education and culture.

7.2 Wood Products

Forest products dominate the list of commodities shipped from British Columbia to Taiwan. Pulp, wood and paper products represented approximately 45% of all British Columbia exports to Taiwan in 2006. Some wood exporters to Taiwan consider it to be an emerging market that represents among some the best economic prospects for British Columbia. Taiwan continues to have development and reconstruction needs that arose from a devastating earthquake in the central region in 1999 and British Columbia's wood frame houses are believed to be safe in earthquakes. Although Taiwan's overall market size for wood products is a moderate size for Asia, British Columbia softwood lumber exports have increased from approximately C\$45 million in 2000 to almost C\$60 million in 2005. While the market dropped off somewhat in 2006, in the first quarter of 2007 saw BC lumber exports to Taiwan up over 100% for the same period in 2006.

BC's lumber exports to Taiwan have generally been of the lower grades, yet this fact is anticipated to change as a result of the Taiwan's approval for the island's first wood frame construction (WFC) code. It is anticipated that the new code, along with new material standards, and the recently completed Taiwan Guide to Good Practices for WFC will help jump start the Taiwan market for higher value construction grades of BC lumber.

It is generally understood in British Columbia and certain sectors of Taiwan building industry that WFC has enormous potential for growth in Taiwan and throughout Asia. The superior seismic performance of wood construction is increasingly recognized in Taiwan where earthquakes are a regular occurrence. Further, wood as a material meets the policies and consumers' changing demands for green construction and homes that minimize environmental impact utilizing renewable resources and high energy efficiency.

With the completion of the Taiwan Guide to Good Practices an in-depth assessment of the Taiwan market potential should be undertaken to develop opportunities available in the Taiwanese wood products and wood frame construction market. Joint Taiwan/BC industry sponsored projects to develop a greater understanding and appreciation for Taiwan opportunities such as WFC hybrid and green structures will be needed. Further, recent work to get BC material standards approved in Taiwan along with grade stamp certification must be completed to help move the market forward. Support for the Taiwan's Construction and Planning Administration to establish a regulatory framework in Taiwan can quickly process and approve WFC building permits, and avoid the bottlenecks currently experienced at the local building approval level.

Finally, significant opportunities exist in Taiwan for high-end engineered wood products such as glue laminated structural timbers. At present, demand in Taiwan for high-end engineered wood products is approximately C\$400 million a year at present. Of this amount more than two thirds is imported. The recent success of British Columbia companies in this sector bodes well for the future. However, more assistance must be given to the Taiwan authorities responsible for fire testing so that fire codes for these products can be brought up-to-date. Once the codes are updated, the demand for engineered wood is expected to grow sharply in Taiwan.

7.3 Biotechnology – Life Sciences

The Taiwan biotech industry is on the rise and was designated a "star industry". In 2002, a development plan for 2008 was drafted to drive the Taiwanese economy. One of the main cores of the Challenge 2008 Plan was titled the "Two Trillion, Twin Stars" plan. The plan is focused on the promotion of investment in the "twin star" industries of biotechnology and digital content. The effects of the plan are becoming clear, as biotechnology production value reached US\$4.53 billion in 2004, according to Taiwan's Biotechnology and Pharmaceutical Industries Program Office.

Research from the Biotechnology and Pharmaceutical Industries Program Office shows pharmaceuticals generated the largest production value of Taiwan's biotech industry in 2004, at US\$1.88 billion, or 41.5 percent of the total biotech industry. In the first six months of 2005, production exports of pharmaceuticals were reported to have risen by 93.8 percent.

While Taiwan traditionally focuses on production of generic medicines, Taiwan companies have recently formed a number of joint ventures to advance pharmaceutical technology. Recent examples of joint ventures between Taiwan and British Columbia firms include the formalizing of agreements between British Columbia biotech firms and their respective Taiwan partners. In most cases thus far, the BC companies supply the technology while the Taiwan side generally provides additional capital, production capabilities and markets.

Foreseeing the potential of the industry, Taiwan has offered numerous incentives and grants to encourage investment and research. With strong policy and public support, the industry is expected to achieve 25 percent annual growth and NT\$150 billion (US\$4.44 billion) in accumulated investment by the end of this year, leading to the establishment of over 500 biotech firms within a decade. Taiwan hopes to become a vital link in the international biotechnology community for R&D and commercialization, as well as become a center of R&D, manufacturing, and operations for biotech businesses in the Asia-Pacific region.

The greatest issue for the Taiwan biotech sector today is not funds but access to new technologies. As such, Taiwan venture capital firms are eager to consider offshore technology transfer and/or joint ventures in which to invest. In the past two years, with its established base of companies in the lower mainland and its ranking as the 7th largest cluster in North America, BC has made some significant inroads into the Taiwan VC market with its cutting edge technologies. One such case established this past year which closely utilizes BC technology and Taiwan VC funds, with a China market focus, follows closely the API objective to place BC as the North America's Asia Pacific gateway.

Formally BC Biotech, the BC industry is now represented by Life Sciences British Columbia (LSBC), which is another excellent example of an industry network that incorporates academic institutions, associations and government, in addition to its private sector membership. The API vision to focus on branding and marketing should continue to be melded with this sector, and LSBC is the entity best able to represent the sector and get the message out in a most efficient and cost effective manner.

7.4 Environmental Technologies

As Taiwan becomes more committed to emergency response preparedness and it continues to develop as a major manufacturing base for advanced technologies, the demand for pollution control equipment and technologies rises significantly. Products and training services related to oil spill clean-up and response, as well ultra pure water equipment, process water recycling/reuse equipment, heavy and precious metals recovery technologies, and volatile organic compound (VOC) control equipment have all good potential in the Taiwan market. Further, Taiwan's plan to increase household connection rates to the public sewage systems will increase the demand for advanced water treatment technologies. Other immediate opportunities for BC companies to pursue in Taiwan relate to soil and groundwater remediation technologies and equipment to investigate ground water conditions.

At present, a number of British Columbia companies have found success in the Taiwan market in the areas of monitoring instruments, pollution containment and control systems, emergency communications, water treatment, and renewable energy. As with marketing to other opportunity sectors in Taiwan, BC companies active in these particular areas frequently visit the market, research market developments, and stay in close contact with buyers, users and local agents.

BC's former Leading Edge's 'Sustainability Technologies Cluster' and 'Energy Technology Cluster' were very broadly based and focused on renewable/alternate energy. This energy sector is also an area where we see significant potential arising from the fact that Taiwan's ITRI has already expended significant resources towards this sector and has had significant collaboration with BC companies in the field. Some BC companies have already engaged in strategic alliances due to Taiwan's ability to act as a bridge into China. As alternative energy gains in profile and acceptance, there is a sense that more effort should be made to harness together the numerous technologies available in the province, and use such a cluster to highlight the innovative nature of BC above and beyond its existing profile as a supplier of resource based energy materials.

7.5 Seafood Products

Taiwan's total seafood imports by value in 2004 were over C\$320 million. In 2006, BC exported over C\$13 million of seafood products to become Canada's largest provincial exporter. Since 2002, British Columbia has more than doubled the value of its seafood exports to Taiwan. In 2006, British Columbia's further increased its exports of fresh or chilled farmed salmon to C\$10 million an additional 20% over 2004 exports. BC's farmed salmon exports have more than tripled since 2002 cutting into Norway's market share being Taiwan's traditional source of farmed salmon.

Although Taiwan is traditionally a net exporter (by value) of seafood, local consumers have recently developed a new taste for imported seafood preferences including salmon roe, surimi (pollock and cod), oyster, abalone, sea cucumber, salmon, scallops, halibut, and cod. All these items are harvested for export in British Columbia and have been exported to Taiwan.

It should be noted that seafood is not only an important part of the Taiwan diet, but also a key component in many social related activities. A dish of steamed whole fish with the head and tail is a key component of any formal dinner or banquet, especially wedding banquets. In addition to this mandatory dish, other seafood dishes, such as lobster, mullet roe, scallops, abalone, sea cucumber, crab, oysters and shrimp are very popular items on any banquet menu.

Taiwan's imports of seafood products are expected to increase over the long term in response to higher per capita incomes, an increasing awareness of a healthy diet, ongoing tariff reductions and the continued contraction of domestic fishery production. As such, the opportunities for increased exports of British Columbia seafood products to Taiwan appear quite bright. However, in order to take advantage of this upswing, British Columbia exporters must aggressively enter the market to promote their products.

In order to take advantage of what the Taiwan market has to offer, and by extension the China market, British Columbia exporters must be proactive and visit the market. In preparation, exporters must make contact with the CTOT in Taipei for import lists and recommendations on where and who to meet.

7.6 Advanced Manufacturing

Advanced machinery and equipment play an increasingly important role in Taiwan as it continues to advance as a modern, technology-intensive and highly automated economy. Taiwan manufacturers' continue to modernize their production equipment pushed by the island's labor shortage and rising labor costs, as well as by Taiwan's active promotion of industrial upgrades to improve competitiveness in world markets. Consequently, Taiwan's demand for technology driven industrial machinery and equipment is growing and is assisted through tax and R&D incentives for private investment in industrial upgrading and factory automation.

In 2006, British Columbia was Canada's top exporter in the advanced manufacturing sector to Taiwan with exports valued at more than C\$30 million. British Columbia products that have been active in this sector in Taiwan include state-of-the-art marine instruments; continuous lubricators; sorting and screening production line equipment; conveying systems and equipment for the food and beverage industries; energy management systems; and control products incorporating microprocessors for large volume precision manufacturing processes.

These exporters from British Columbia not only export to Taiwan, but also gain valuable experience and knowledge from Taiwan's advanced manufacturing sectors as they quickly expand and develop their operations to China. As such, Taiwan offers a high value and educated marketplace which also serves as a springboard for expansion into China's rapidly developing equipment and machinery market.

While not large at this point, the Taiwan successes of BC companies in this particular area is a testament to the advanced nature of their technologies, and as such these companies should be recognized and engaged to become active participants in the API's drive to help build BC's global identity in Asia Pacific.

7.7 Education

As a key component of the API, international education has been a valuable generator of revenue to the provincial economy with potential for even greater economic benefits. Taiwan is the third largest source of long and short-term students in BC. Taiwanese full-time students make up over 16% of British Columbia's total full-time international student population. Moreover, British Columbia's experience in offering international students high quality education, combined with the diversity of post-secondary offerings and location on the Pacific Rim, positions the province well for continued and increased involvement in international education with Taiwan and the region.

As such, the Taiwan market remains very important to BC's international student recruitment efforts. Full time international students subsidize the BC school system and economy to the tune of over \$30,000 per student per year. Currently, BC accounts for approximately 60% of all Taiwanese students studying in Canada. According to customs statistics, Taiwan students make up BC's third largest source of international students pumping upwards of \$150 million a year into the BC economy in 2006.

International students from Taiwan have the ability to develop long-term relationships with British Columbia that will benefit the province in both its trade and investment promotions for years to come. As future decision makers and long-term ambassadors of the province this resource should be more actively pursued and developed. Hence, this resource should be more proactively approached and nurtured as a focused and cost effective way to spread BC's good news around the globe.

At present, BC is seen by many in Canada and abroad to be a leader in the promotion of its educational services abroad. While maintaining the perception of an advanced global education destination, BC institutions and related business organizations are facing increasing pressure. This pressure is coming from both within and outside Canada in the form of competition for the finite number of international students worldwide. Jurisdictions around the globe are increasingly aware of the potential immediate and long-term economic benefits from international education and in turn have ramped up their resources to compete. As such, the API's strategy to position BC as a destination for education is most timely. The key will be to make this a long term, well thought out strategy that directly employs the support and funding of the BC government.

8.0 Barriers to Enhancing Commercial Relations

Since officially joining the WTO on January 1, 2002 Taiwan has undertaken significant reforms and liberalization in order to meet WTO requirements. It has implemented many improvements in market access for goods and services under terms negotiated with Canada and other WTO members. The sectors of interest to British Columbia include pharmaceuticals, paper, agricultural, agri-food and seafood products.

As pointed out, as recent as 2004 the Taiwan market for British Columbia lumber products remained larger than both China and South Korea. In order to further increase lumber exports to Taiwan, the British Columbia industry is working closely with Taiwan authorities to

implement an approval process to deal with market access concerns. To open the market further in the short term, British Columbia is keen to receive approvals on its grade stamp applications and receive formal recognition on its material standard submissions. With the creation of a WFC code for Taiwan, British Columbia is requesting an approval mechanism to review and approve WFC building permit applications. Such a mechanism will assist local building authorities, fast track approvals and help alleviate quality control concerns. Additionally work is being done at present to expand the classification and interior application of borate as an approved preservative treatment for wood structures. It is believed that the above measures will assist greatly to jump start the market for British Columbia construction grade lumber in Taiwan.

In 2006, other market access priorities affecting British Columbia products included: removing Taiwan's BSE ban on imports of beef and beef products from Canada; recognition of the equivalency of Canadian and U.S. quality control accreditation for medical devices; advance notification of any changes in Taiwan's regulations affecting trade in agricultural and forestry products; and recognition of Canada's regulatory inspection standards for fruit products.

Other than the obvious trade related barriers to enhancing commercial relations, one less than obvious barrier is the lack of information regarding Taiwan's relations with China. Today, some business people from Canada have shown a reluctance to do business with Taiwan for the reason they fear negative repercussions from China if they are also doing, or plan to do, business in that market. What seems obvious to those business people in Taiwan and the region, specifically the extensive nature of the direct trade and investment ties between Taiwan and China, is obviously lost on some of their counterparts in Canada. Therefore, to address this issue, and assist BC develop itself as a truly Asia Pacific destination, information and intelligence on the general nature of business within the Asia Pacific must be made more available to BC business and sector organizations under the API. As market intelligence is an area of priority under the API, this issue should be easily covered off with adequate resources and distribution within the BC business community.

9.0 Competition Threats

Most countries have well-established and fully funded trade and investment offices in Taiwan. In addition, a number of US states including BC's Pacific Northwest partners of Alaska, Washington, Montana and Oregon all have stand alone fully staffed offices in Taiwan. At the time of writing this report the Governor of Alaska was visiting Taiwan and was receiving plenty of positive media attention in the process. As far as Canada is concerned, in addition to the CTOT, the provinces of Alberta and Quebec both operate fully funded trade and investment offices in Taiwan. When one considers the sheer size of BC origin exports to Taiwan and the numbers of international students, tourists and immigrants coming to BC, the lack of representation could mean a lost opportunity.

In the global quest for available foreign direct investment (FDI) funds, Taiwan is not unlike other jurisdictions where competing interests become more aggressive and respond with

better-funded business promotion programs. Hence, the API strategy for BC is a timely undertaking that will literally help put the province back on the map in the region.

10.0 How to Increase Market Intelligence Available to BC Companies

The creation of added market intelligence must initially be generated with direct assistance from the sector specific networks covered earlier in this report. With the growth of technology-based sector specific clusters both in British Columbia and Taiwan, market intelligence can more easily be generated and disseminated. In the case of Taiwan there are sector specific organizations such as the Biotechnology and Pharmaceutical Industries Program Office, for example, that focuses on gathering market intelligence on an ongoing basis. Such organizations have helped to facilitate significant successes within their sectors in Taiwan and in doing so have been able to maintain long-term funding from industry and agencies to fund their activities. As specified in the API, BC is now going to concentrate on promoting its technology sector, and in doing so it is hoped the province's established technology clusters and their networks will receive the necessary support to assist their members gather and disseminate regular sector specific market intelligence. When concentrating on specific markets, these clusters also generate general market information that can be shared outside of the networks and throughout the API family and BC business community.

An entity (such as the proposed Asia Pacific Unit) within the API government structure to monitor, track, and assist distribute market intelligence beyond the networks is the right approach. The entity would have responsibility for setting basic guidelines for content and the gathering of the market intelligence. In addition, the entity would be required to monitor timely collection and submission, and insure the information is distributed amongst the API stakeholders and beyond.

11.0 Provincial Government Options to increase Export Trade

11.1 Marketing and Promotional Products

Marketing and promotional materials are clearly one of the essential ingredients to the successful implementation of the API. Due to intense global competition these tools are necessities in creating interest and dialogue. The materials must be focused, language sensitive, well prepared and use information that decision makers can quickly and easily recognize.

11.2 Marketing Research and Branding

Branding is a long-term and ongoing exercise that must be adequately resourced and funded in the API. It will also require a unified approach to promoting the province and must tie-in the various other stakeholders such as Tourism and Education as stated in the API. Therefore, and as mentioned earlier, the government must play a direct role in overseeing the sources, collection, quality, and dissemination of the market research collected.

11.3 Trade Missions

Focused and sector specific trade missions will be a powerful tool in achieving the trade objectives of the API. That said, such activities require more effort and financial resources than most other promotional activities and therefore need to be planned and executed with great care and attention to detail.

Although missions require greater effort and financial resources, they also tend to produce better results if adequately researched, planned, and executed. In Taiwan, both in-bound and out-bound trade related missions provide opportunities for direct contact, not only with business decision makers interested in the province's trade and investment opportunities, but also with agencies, opinion leaders, and other key players. This interaction is of particular importance to Asian business people who place great significance upon the development and maintenance of interpersonal relationships.

12.0 Provincial Government Options to increase inbound investments

12.1 Immigration as an Economic enhancement program

The Provincial Nominee Program (PNP) is an effective investment tool that needs to be selectively used to attract FDI and strategic alliances under the objectives of the API. In Taiwan, the BC PNP needs to be utilized as an incentive for large companies and investors to invest and develop strategic relationships with the Province. The use of the PNP allows Taiwan companies' to retain their highly skilled engineers by offering them the opportunity to relocate themselves and their families to such a preferred location as BC.

12.2 Marketing and Promotional Products

As with trade, marketing and promotional materials are clearly one of the essential ingredients to the successful implementation of the API. Due to intense global competition these tools are a necessity in creating interest and dialogue. The materials must be focused, language sensitive, well prepared and use information that decision makers can quickly and easily recognize.

For investment promotion BC needs to 'package' opportunities that provide enough information to allow the key decision makers to proceed to the next step of requesting more detailed information and/or consider making a trip to see the opportunities first hand.

12.3 BC Full-Time Trade and Investment Representatives

A strong component of the API strategy to strengthen BC's Asia Pacific trade and investment relationships must be the placement of BC representatives in key markets as in-market facilitators and a primary bridge back to BC.

Essential to the representatives' success will be the tools required to carry out their task and create interest in the Province and its targeted sector development initiatives. An effective representative can open doors, yet, to successfully achieve the API goals and objectives the appropriate tools must be provided to help keep the door open. Once access has been given and then taken away, it will be very difficult to re-establish the interest or the relationship.

12.4 Investment Missions

Focused and sector specific investment missions will be a powerful tool in achieving the objectives of the API. That said, as with out-bound trade missions to Taiwan, such activities require more effort and financial resources than most other promotional activities and therefore need to be planned and executed carefully, as Asian business people tend to place great significance upon personal interaction in development and maintaining business relationships.

Further, if the opportunities created by missions are well managed and exploited, they can generate a number of positive results including near-term investment decisions and favourable publicity, to longer-term benefits such as image building and the planting of "seeds" among other potential investors.

The downside of missions, if poorly prepared and/or weakly executed, is that they can result in harmful setbacks to investment promotion strategies and objectives. For these and other reasons, it will be imperative for API to have the necessary BC resources in place in order to achieve the objectives of all participants.

12.5 Media Awareness and Familiarization Tours

Media tours are effective tools for the promotion of education, tourism, trade and investment and complement the overall strategies of the API and its clear objective to position BC as North America's Asia Pacific destination.

When budgets are available, familiarization tours (FAM tours) are particularly effective in getting the word out to both industry and consumers. FAM tours and the resulting media coverage allow for a maximization of promotional coverage and a significant saving of advertising dollars.

Like missions, FAM tours have to be well prepared and researched to be effective. Additional care must be made selecting qualified participants, and once selected, clear objectives and deliverables must be established with individual media representatives.

Once prepared, execution and follow-up become the critical components of a successful FAM tour. To that end effective communication between the representatives, BC based resources, and media representatives are critical to steer the project to a successful conclusion. In the case of FAM tours, a successful conclusion will likely not be achieved until weeks and perhaps months following the conclusion of the trip. Therefore, active follow-up by the regional representatives is essential.

Due to the beauty of British Columbia there is a strong case to be made for leveraging off Tourism BC's budgeting in the area of FAM tours. When soliciting investment opportunities it only makes sense to have selected business media experience the scenic side of the province. This helps to create a very favourable impression of British Columbia for decision makers considering a destination for families, staff and investment dollars, and also offers an excellent opportunity for Tourism BC to cost-effectively promote corporate incentive travel directly through the business media.

12.6 Business Ambassadors

The opportunity to have respected and successful businesspeople with strong ties to a particular region or sector representing BC can be a very effective promotional tool. Once again, the selection of these individuals will be key, as well as their clearly understanding their 'role' once selected.

It is important that these Ambassadors are 'empowered' in some way by the province, not monetarily but through some legitimate or formal recognition that will distinguish the individual. In Asia in particular, recognition by the BC Government lends a degree of respect and legitimacy to an individual that cannot be acquired by purely financial means. Hence, the opportunity to locate someone who is successful in his or her own right and sees the value of such an appointment not as a means to receive, but rather to give back to the province, can be a very effective and low cost investment tool.

Once suitable individuals can be identified, they can be engaged in any number of ways from leading and/or hosting missions, to providing access to senior contacts in both industry and government abroad.

A further sub-component of the 'Ambassadors' program could be to appoint Junior Ambassadors (or similar facsimile) from selected international student associations in BC. This would provide a good platform to position BC as an international education destination and build BC's global identity in the minds of the Asia-Pacific leaders of tomorrow.

13.0 Opportunities and Recommendations Arising from the Asia Pacific Initiative

13.1 Sectoral Approach

As noted earlier in this report, the harnessing of the technology based sector networks such as New Media BC, WINBC and LSBC, along with added support for the established networks found in the more traditional sectors such as wood products, tourism and education, is perhaps the most powerful tool BC has to launch the API mandate efficiently and cost effectively.

The sectoral approach will allow the Province to quickly develop market strategies with the emerging technology sectors and in doing so be focused upon the real needs of AP markets such as Taiwan. This approach will also allow for the immediate coordinating of provincial programs with planned federal activities to more effectively market BC products and services.

In Taiwan, the upcoming Canadian bi-lateral agreements and technology based promotional events scheduled for October and November 2007 should provide BC with an excellent opportunity to get the ball rolling.

In addition to BC strengthening the existing networks by providing sustained and long-term funding (with clearly defined deliverables), the BC government will also add legitimacy to the networks that will benefit them greatly when dealing with Taiwan agencies in the pursuit of mutual beneficial partnerships.

13.2 Leverage Existing In-Market BC Assets

In Asia-Pacific markets such as Taiwan, where significant BC activities already exist, there is the opportunity to utilize existing support and contacts in areas such as tourism, education and wood products. These existing assets will further help the API meet its objectives to strengthen relationships and enhance BC's identity as North America's Asia-Pacific destination.

13.3 One-Window Approach to Investment Facilitation

While the API's 'Asia-Pacific Investment Marketing and Attraction Program' is BC's primary resource for communicating competitive advantages in the Province, it should also incorporate a one-window approach to investment facilitation. For serious investors, the desire and need to access a single entry point for investment assistance and support should be considered as being fundamental to the API. When potential investors get sidetracked or find it difficult to get the information they need in the initial stages of the investment process, it is very easy for them to get frustrated and move on. The cities of Montreal and Toronto employ such an approach to investment facilitation and both have received strong approval and satisfaction ratings from would-be investors.

13.4 API Centralized Control

The intention to have a centralized control function to communicate easily throughout government, avoid repetition, create synergies, and maximize exposure will be crucial towards meeting the various goals and objectives of the API.

13.5 Federal Government Linkages

The strategy to work with the Federal government and set clear objectives and deliverables will be an effective way to capitalize on the available resources, funding programs, connections and the presence of the Canadian government in Taiwan and across the region.

13.6 Regional Approach to Marketing

In order to strengthen BC's trade and investment relationships, good use of promotional and marketing events in the region should be made. The ability to highlight products and services where BC firms have already experienced significant success in the Asia-Pacific region can be far more powerful than just bringing them back to BC. Such an approach will help tie in the activities of the full time representatives in the region and allow them to generate interest for

BC/Canada events within their specific markets and generate interest amongst their colleagues and clients throughout the region. This is also a cost effective way to lead missions to targeted events within the region.

13.7 Increase Cultural, Business Knowledge and Language Skills

As part of the API's skills focus, One World Scholarship and Pacific Horizons Scholarship applicants can be placed to work throughout BC's representative agencies in the region. This is an invaluable tool to meet the API objectives which is also a cost-effective way of supporting BC's presence in the Asia-Pacific region. In addition, the province can consider assisting BC secondary and post-secondary institutions to create recognized short and long-term student exchange programs throughout the region.

BC - TAIWAN STATISTICS

- 1. BC Export Destinations (\$ millions)**
- 2. Imports Cleared Through BC Customs Ports (\$ millions)**
- 3. Exports to Taiwan - Top 20 Commodities (by HS 2 digit codes) - 2006 (\$ millions)**
- 4. Imports from Taiwan - Top 20 Commodities (by HS 2 digit codes) - 2006 (\$ millions)**
- 5. Canadian Trade in Services with Taiwan (\$ millions)**
- 6. Canada- Taiwan Foreign Direct Investment Stock (\$ millions)**
- 7. Immigration from Taiwan to BC (by Class)**

1. BC Export Destinations – Top 20 (\$ millions)

Destination Country/Economy	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
United States	14,858	16,375	19,371	22,196	22,104	19,666	18,792	20,121	22,880	20,463
Japan	6,002	4,540	4,467	4,891	4,066	3,859	3,660	3,805	4,208	4,706
China	449	458	582	706	727	756	920	1,225	1,361	1,486
South Korea	939	654	737	895	712	725	777	910	1,180	1,365
Taiwan	431	349	352	402	315	339	433	487	513	521
Germany	476	396	300	535	382	321	381	428	500	471
Italy	474	439	446	617	533	429	467	463	569	447
United Kingdom	289	302	319	381	355	337	306	341	458	386
Netherlands	204	251	235	175	212	223	228	325	318	375
India	64	85	84	99	118	120	109	133	206	346
Hong Kong	345	262	265	278	218	208	180	252	321	252
Brazil	103	78	84	121	168	94	147	155	226	199
Philippines	118	70	64	106	56	84	112	120	162	185
Mexico	62	61	42	58	83	79	109	198	243	179
Australia	236	226	244	251	173	187	202	224	204	175
Belgium	292	305	305	488	312	207	161	201	227	171
France	183	176	167	217	168	150	165	181	195	152
Turkey	58	46	51	61	55	90	61	104	152	148
Indonesia	144	125	159	285	110	132	121	171	135	126
Thailand	95	60	84	123	94	101	93	104	102	102
TOTAL (ALL MARKETS)	26,699	25,942	29,044	33,639	31,680	28,828	28,264	30,992	35,510	33,415

Source: Statistics Canada

2. Imports Cleared Through BC Customs Ports – Top 20 (\$ millions)

Origin Country/Economy	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
United States	11,623	12,526	12,492	13,350	14,075	11,826	11,572	12,698	14,164	15,497
China	1,520	1,886	2,321	2,961	3,351	4,188	4,610	6,105	7,509	8,540
Japan	4,463	5,004	5,745	6,443	6,100	7,181	6,472	4,592	4,608	5,120
Korea, South	617	819	1,084	1,480	1,770	1,970	2,135	2,503	2,307	1,658
Mexico	359	351	362	419	527	618	627	663	730	994
Taiwan	616	665	740	993	981	987	872	870	841	863
Germany	299	310	283	343	323	316	329	386	409	508
Thailand	286	319	339	441	514	472	432	457	411	442
Malaysia	381	352	363	425	384	371	417	421	338	437
Australia	231	331	308	368	366	379	383	374	372	388
United Kingdom	242	235	304	327	247	234	227	328	314	378
Italy	218	218	213	240	243	240	274	280	295	356
Peru	31	44	38	66	72	79	99	113	51	327
Re-Imports (Canada)	337	377	371	355	375	368	346	295	211	250
India	74	95	103	122	134	166	164	177	181	234
France	212	239	178	151	165	158	182	238	221	233
Vietnam	43	60	68	68	75	90	103	146	140	183
Chile	61	61	59	55	65	87	99	103	112	176
Indonesia	165	202	193	173	187	193	167	166	149	173
Sweden	61	57	60	88	74	74	94	94	126	172
TOTAL (ALL MARKETS)	23,347	25,732	27,170	30,804	31,641	31,534	31,270	32,879	35,296	38,887

Source: Statistics Canada

3. Exports to Taiwan - Top 20 Commodities (by HS 2 digit codes) - 2006 (\$ millions)

Commodity	BC to Taiwan	Total BC Exports	Taiwan % of BC Total
27-Mineral fuels, oils & product of their distillation; etc	158	6,400	2%
47-Pulp of wood/of other fibrous cellulosic mat; recovered waste etc	147	2,919	5%
48-Paper & paperboard; art of paper pulp, paper/paperboard	60	1,865	3%
44-Wood and articles of wood; wood charcoal.	44	8,521	1%
79-Zinc and articles thereof	23	546	4%
03-Fish & crustacean, mollusc & other aquatic invertebrate	13	933	1%
84-Machinery, boilers, mechanical appliances, engines, pts	12	1,559	1%
08-Edible fruit and nuts; peel of citrus fruit or melons.	8	218	3%
90-Optical, photo, cine, meas, checking, precision, etc	6	440	1%
41-Raw hides and skins (other than furskins) and leather.	5	14	37%
85-Electrical mchy equip parts thereof; sound recorder etc	5	671	1%
28-Inorgn chem; compds of prec met, radioact elements etc	4	266	1%
23-Residues & waste from the food indust; prepr ani fodder	4	75	5%
21-Miscellaneous edible preparations.	4	108	3%
22-Beverages, spirits and vinegar.	4	108	3%
72-Iron and steel	3	260	1%
74-Copper and articles thereof	3	77	4%
76-Aluminium and articles thereof.	3	946	0%
33-Essential oils & resinoids; perf, cosmetic/toilet prep	2	36	5%
87-Vehicles o/t railw/tramw roll-stock, pts & accessories	2	361	1%
OVERALL TOTAL	521	33,415	2%

Source: Statistics Canada

4. Imports from Taiwan - Top 20 Commodities (by HS 2 digit codes) - 2006 (\$ millions)

Commodity	Taiwan	Total BC Cleared Imports	Taiwan % of BC Total
87-Vehicles o/t railw/tramw roll-stock, pts & accessories	226	4,027	6%
84-Machinery, boilers, mechanical appliances, engines, pts	170	5,507	3%
72-Iron and steel	78	1,194	7%
85-Electrical mchy equip parts thereof; sound recorder, etc.	66	6,520	1%
73-Articles of iron or steel	43	1,523	3%
39-Plastics and articles thereof	36	285	12%
40-Rubber and articles thereof	25	58	44%
76-Aluminium and articles thereof	25	1,134	2%
74-Copper and articles thereof	23	1,014	2%
99-Special Transaction - Trade	21	1,225	2%
28-Inorgn chem; prec metal cmpds, radioact elements, etc.	13	2,370	1%
48-Paper & paperboard; art of paper pulp, paper/paperboard	11	163	7%
19-Prep of cereal, flour, starch/milk; pastrycooks' prod	11	749	1%
90-Optical, photo, cine, meas, checking, precision, etc.	9	261	4%
64-Footwear, gaiters and the like; parts of such articles	9	718	1%
61-Art of apparel & clothing access, knitted or crocheted	9	292	3%
52-Cotton	8	427	2%
95-Toys, games & sports requisites; parts & access thereof	7	381	2%
83-Miscellaneous articles of base metal	5	189	3%
94-Furniture; bedding, mattress, matt support, cushion, etc.	4	239	2%
OVERALL TOTALS	863	38,887	2%

Source: Statistics Canada

5. Canadian Trade in Services with Taiwan (\$ millions)										
	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
Exports	281	367	486	425	517	523	486	389	323	402
Imports	148	150	146	182	237	224	293	349	297	384
Balance	133	217	340	243	280	299	193	40	26	18

Source: Statistics Canada

6. Canada-Taiwan Foreign Direct Investment Stock (\$ millions)										
	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005
Canada to Taiwan	248	253	323	271	331	146	66	72	175	149
Taiwan to Canada	114	153	107	115	97	104	108	111	115	120

Source: Statistics Canada

7. Immigration from Taiwan to BC (by Class)

	Total	Family	Refugees	Assisted Relatives	Entrepreneur	Self Employed	Investor	Retired	Other Independents
1987	410	67	-	16	170	8	21	78	50
1988	882	57	1	16	419	10	168	113	98
1989	1394	71	-	26	531	9	473	208	76
1990	1724	117	-	20	558	2	675	257	95
1991	2651	162	1	10	564	25	1429	403	57
1992	4172	251	1	34	707	90	2491	502	96
1993	5982	258	-	87	830	103	3563	955	186
1994	4746	310	-	239	757	156	2256	623	405
1995	5349	327	-	714	785	264	1485	34	1740
1996	9401	420	-	1454	960	620	1406	29	4512
1997	9148	388	-	1551	953	419	895	16	4926
1998	4740	253	-	820	360	268	635	-	2404
1999	3577	242	-	557	335	184	641	4	1614
2000	2256	242	-	350	261	134	313	-	956
2001	1923	242	-	262	318	124	215	-	762
2002	1936	223	1	236	193	147	324	-	812
2003	1595	214	1	196	94	95	254	-	741
2004	1359	456	-	78	51	75	429	-	270
2005	2235	1005	-	47	99	102	767	-	215
2006	1920	997	2	49	65	71	572	-	164

Source: Citizenship and Immigration Canada