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MARKET INTELLIGENCE

SELECTED FOOD PROCESSING EQUIPMENT

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REFERENCE SOURCES

Industry, Science and Technology Canada
Statistics Canada Tel.: (613) 951-9647
Revenue Canada Tel.: (613) 954-7006
U.S. Department of Commerce,
Bureau of the Census
Tel.: (301) 763-7754

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1-800-267-8376

EXPLANATORY NOTES

Commodity Classification

Canadian Trade statistics are classified and published according to the
International Convention on the Harmonized Commodity and Description Coding
System (H.S.), as defined by the Canadian Customs Tariff and Statistical
Nomenclature.

Valuation

Dollar values shown in this report are based on selling price F.O.B. plant, in
Canadian dollars. This selling price represents the value paid by the importer,
excluding all freight, packing and insurance costs when specified. All trade
discounts, when applicable, are also deducted from the selling price.

Rounding

Figures may not add due to rounding.

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SELECTED FOOD PROCESSING EQUIPMENT

INTRODUCTION AND SCOPE

This report is part of a continuing series designed to increase business awareness of the potential existing for production in Canada. It is important, however, to emphasize that this report does not attempt any assessment as to the feasibility of competing in a particular market.

This profile is based on data from several sources, including some which are not generally available, for the following Harmonized System (H.S.) import commodity codes:

| <u>Description</u> | <u>Commodity Codes</u> |
|--|--------------------------------------|
| Machinery, for the industrial preparation or manufacture of food or drink, other than machinery for the extraction or preparation of animal or fixed vegetable fats or oils. | |
| ◦Bakery machinery and machinery for the manufacture of macaroni, spaghetti or similar products | 8438.10.10.10 to 8438.10.20.20 |
| ◦Machinery for the manufacture of confectionery, cocoa or chocolate | 8438.20.10.10 to 8438.20.90.00 |
| ◦Machinery for sugar manufacture | 8438.30.00.10 to 8438.30.00.90 |
| ◦Brewery machinery | 8438.40.00.00 |
| ◦Machinery for the preparation of meat or poultry | 8438.50.10.00 to 8438.50.90.99 |
| ◦Machinery for the preparation of fruits, nuts or vegetables | 8438.60.00.10 to 8438.60.00.20 |
| ◦Machinery not elsewhere specified, for the industrial preparation, manufacture of food, drink except for extraction or preparation of vegetable fats and oils | 8438.80.10.10 to 8438.80.99.90 |
| ◦Parts | 8438.90.10.10 to 8438.90.30.97 |

SELECTED FOOD PROCESSING EQUIPMENT

CANADIAN IMPORTS

| Description and Commodity Code | Total Imports 1988 | 1989 | Major Country of Origin | |
|---|-----------------------|--------|----------------------------|------------------|
| | | | % of Total Value 1988 | 1989 |
| Bakery machinery and machinery for the manufacture of macaroni, spaghetti or similar products 8438.10 | | | | |
| Quantity (No.) | 4 260 | 3 791 | U.S.A. | U.S.A. |
| Value (\$000) | 27 104 | 25 933 | 43 | 44 |
| Bakery machinery 8438.10.10 | | | | |
| Quantity (No.) | 2 986 | 3 488 | - | - |
| Value (\$000) | 23 498 | 22 947 | - | - |
| Dough or pastry mixers, including kneaders 8438.10.10.10 | | | | |
| Quantity (No.) | 761 | 624 | U.S.A. | U.S.A. |
| Value (\$000) | 4 508 | 4 785 | 57 | 54 |
| Dough dividers 8438.10.10.20 | | | | |
| Quantity (No.) | 275 | 233 | Italy | U.S.A. |
| Value (\$000) | 3 080 | 3 689 | 34 | 28 |
| Dough moulders 8438.10.10.30 | | | | |
| Quantity (No.) | 200 | 176 | Netherlands | Fed. Rep. |
| Value (\$000) | 1 883 | 1 522 | 29 | of Germany 20 |
| Slicers 8438.10.10.40 | | | | |
| Quantity (No.) | 257 | 555 | U.S.A. | U.S.A. |
| Value (\$000) | 1 258 | 869 | 78 | 80 |
| Cutting, shaping, sawing or filling machines for biscuits, cakes, pies and similar bakery products 8438.10.10.50 | | | | |
| Quantity (No.) | 586 | 195 | U.S.A. | United Kingdom |
| Value (\$000) | 5 772 | 5 731 | 51 | 39 |
| Other 8438.10.10.90 | | | | |
| Quantity (No.) | 907 | 1 705 | U.S.A. | U.S.A. |
| Value (\$000) | 6 997 | 6 351 | 48 | 67 |
| Machinery for the manufacture of macaroni, spaghetti or similar products 8438.10.20.00 | | | | |
| Quantity (No.) | 1 273 | 303 | Italy | Italy |
| Value (\$000) | 3 603 | 2 984 | 85 | 56 |

SELECTED FOOD PROCESSING EQUIPMENT

CANADIAN IMPORTS (Cont'd)

| <u>Description and Commodity Code</u> | <u>Total Imports</u> | | <u>Major Country of Origin</u> | |
|--|----------------------|-------------|------------------------------------|----------------|
| | <u>1988</u> | <u>1989</u> | <u>% of Total Value 1988</u> | <u>1989</u> |
| Machinery for the manufacture of confectionery, cocoa or chocolate 8438.20 | | | | |
| Quantity (No.) | 168 | 74 | U.S.A. | Denmark |
| Value (\$000) | 7 135 | 4 968 | 33 | 25 |
| Chocolate enrobing, tempering or moulding machinery; candy pulling or extruding machinery; chewing gum manufacturing machinery; cotton candy manufacturing machinery 8438.20.10 | | | | |
| Quantity (No.) | 111 | 74 | - | - |
| Value (\$000) | 3 288 | 4 967 | - | - |
| Chocolate enrobing, tempering or moulding machinery 8438.20.10.10 | | | | |
| Quantity (No.) | 61 | 44 | Denmark | Denmark |
| Value (\$000) | 2 376 | 3 200 | 36 | 38 |
| Candy pulling or extruding machinery 8438.20.10.20 | | | | |
| Quantity (No.) | 15 | 5 | Italy | U.S.A. |
| Value (\$000) | 872 | 47 | 48 | 62 |
| Chewing gum manufacturing machinery 8438.20.10.30 | | | | |
| Quantity (No.) | - | 3 | - | U.S.A. |
| Value (\$000) | - | 109 | - | 57 |
| Cotton Candy manufacturing machinery 8438.20.10.40 | | | | |
| Quantity (No.) | 35 | - | U.S.A. | - |
| Value (\$000) | 40 | - | 50 | - |
| Other 8438.20.90.00 | | | | |
| Quantity (No.) | 56 | 22 | U.S.A. | United Kingdom |
| Value (\$000) | 3 846 | 1 611 | 52 | 67 |

SELECTED FOOD PROCESSING EQUIPMENT

CANADIAN IMPORTS (Cont'd)

| Description and Commodity Code | Total 1988 | Imports 1989 | Major Country of Origin | |
|--|---------------|-----------------|----------------------------|--------------------|
| | | | % of Total 1988 | Value 1989 |
| Machinery for sugar manufacture, sugar tests or other 8438.30 | | | | |
| Quantity (No.) | 8 | 3 | Other Countries | Other Countries |
| Value (\$000) | 480 | 22 | 100 | 100 |
| Brewery machinery 8438.40 | | | | |
| Quantity (No.) | 63 | 8 | United Kingdom | Austria |
| Value (\$000) | 2 483 | 621 | 59 | 61 |
| Machinery for the preparation of meat or poultry 8438.50 | | | | |
| Quantity (No.) | 6 095 | 5 417 | U.S.A. | U.S.A. |
| Value (\$000) | 30 595 | 27 833 | 55 | 48 |
| Plucking, scalding, washing, singeing or eviscerating machinery of a kind used in the preparation of poultry 8438.50.10.00 | | | | |
| Quantity (No.) | 159 | 99 | | U.S.A. |
| Value (\$000) | 1 526 | 1 165 | | 83 |
| Other: | | | | |
| Slaughterhouse machinery 8438.50.90 | | | | |
| Quantity (No.) | 5 935 | 5 318 | | - |
| Value (\$000) | 29 065 | 26 665 | | - |
| Skinning machinery 8438.50.90.11 | | | | |
| Quantity (No.) | 90 | 37 | U.S.A. | U.S.A. |
| Value (\$000) | 690 | 449 | 76 | 61 |
| Other 8438.50.90.19 | | | | |
| Quantity (No.) | 254 | 85 | U.S.A. | U.S.A. |
| Value (\$000) | 2 363 | 1 463 | 46 | 52 |

SELECTED FOOD PROCESSING EQUIPMENT

CANADIAN IMPORTS (Cont'd)

| Description and Commodity Code | Total 1988 | Imports 1989 | Major Country of Origin | |
|---|---------------|-----------------|----------------------------|-------------------------|
| | | | % of Total 1988 | Value 1989 |
| Slaughterhouse machinery: | | | | |
| Bacon preparation machinery 8438.50.90.20 | | | | |
| Quantity (No.) | 41 | 9 | U.S.A. | U.S.A. |
| Value (\$000) | 1 719 | 399 | 66 | 100 |
| Weiner or sausage preparation machinery 8438.50.90.30 | | | | |
| Quantity (No.) | 264 | 259 | Fed. Rep. of Germany | Fed. Rep. of Germany |
| Value (\$000) | 3 342 | 4 008 | 48 | 45 |
| Other machinery used for the preparation of meat or poultry: | | | | |
| For tenderizing 8438.50.90.91 | | | | |
| Quantity (No.) | 187 | 132 | France | France |
| Value (\$000) | 2 805 | 2 376 | 44 | 57 |
| For slicing 8438.50.90.92 | | | | |
| Quantity (No.) | 3 188 | 2 933 | Fed. Rep. of Germany | Fed. Rep. of Germany |
| Value (\$000) | 5 215 | 6 460 | 39 | 42 |
| Other 8438.50.90.99 | | | | |
| Quantity (No.) | 1 911 | 1 863 | U.S.A. | U.S.A. |
| Value (\$000) | 12 931 | 11 510 | 68 | 58 |
| Machinery for the preparation of fruits, nuts or vegetables | | | | |
| 8438.60 | | | | |
| Quantity (No.) | 452 | 162 | U.S.A. | U.S.A. |
| Value (\$000) | 4 325 | 5 686 | 79 | 61 |
| For the preparation of fruit or vegetables 8438.60.00.10 | | | | |
| Quantity (No.) | 446 | 147 | U.S.A. | U.S.A. |
| Value (\$000) | 4 270 | 5 268 | 79 | 63 |
| For the preparation of nuts 8438.60.00.20 | | | | |
| Quantity (No.) | 6 | 15 | U.S.A. | U.S.A. |
| Value (\$000) | 54 | 417 | 100 | 38 |

SELECTED FOOD PROCESSING EQUIPMENT

CANADIAN IMPORTS (Cont'd)

| <u>Description and Commodity Code</u> | <u>Total Imports</u> | | <u>Major Country of Origin</u> | |
|--|----------------------|-------------|------------------------------------|-----------------------|
| | <u>1988</u> | <u>1989</u> | <u>% of Total 1988</u> | <u>Value 1989</u> |
| Machinery NES for the industrial preparation or manufacture of food or drink, except for extraction or preparation of vegetable fats and oils. 8438.80 | | | | |
| Quantity (No.) | 11 725 | 3 183 | U.S.A. | U.S.A. |
| Value (\$000) | 19 691 | 20 635 | 48 | 56 |
| Fish skinning, deheading or grinding machines; feed pellet mills; coating drums, extruders or shredders of a kind used in manufacturing processed breakfast cereal foods 8438.80.10 | | | | |
| Quantity (No.) | 121 | 154 | | - |
| Value (\$000) | 5 765 | 4 679 | | - |
| For the preparation of fish 8438.80.10.10 | | | | |
| Quantity (No.) | 76 | 104 | Fed. Rep. of Germany | U.S.A. |
| Value (\$000) | 3 654 | 2 346 | 47 | 37 |
| Other 8438.80.10.90 | | | | |
| Quantity (No.) | 45 | 50 | U.S.A. | U.S.A. |
| Value (\$000) | 2 111 | 2 333 | 76 | 86 |
| Other machinery of a kind used in manufacturing fish meal, liquid fish or fish solubles, stock or poultry food from fish or fish waste 8438.80.91.00 | | | | |
| Quantity (No.) | 8 | 6 | Norway | Japan |
| Value (\$000) | 421 | 790 | 89 | 57 |
| Other: 8438.80.99 | | | | |
| Quantity (No.) | 11 595 | 3 023 | - | - |
| Value (\$000) | 13 503 | 15 163 | - | - |

SELECTED FOOD PROCESSING EQUIPMENT

CANADIAN IMPORTS (Cont'd)

| Description and Commodity Code | Total 1988 | Imports 1989 | Major Country of Origin | |
|---|----------------|-----------------|----------------------------|--------|
| | | | % of Total Value 1988 | 1989 |
| Machinery for the industrial preparation or manufacture of food or drink, except for extraction or preparation of vegetable fats and oils (cont'd) | | | | |
| For the manufacture of beverages | | | | |
| 8438.80.99.10 | | | | |
| Quantity (No.) | 640 | 316 | U.S.A. | U.S.A. |
| Value (\$000) | 757 | 783 | 76 | 100 |
| Other | | | | |
| 8438.80.99.90 | | | | |
| Quantity (No.) | 10 955 | 2 707 | U.S.A. | U.S.A. |
| Value (\$000) | 12 746 | 14 380 | 52 | 52 |
| Parts | | | | |
| 8438.90 | | | | |
| Quantity (No.) | - | - | U.S.A. | U.S.A. |
| Value (\$000) | <u>47 175</u> | <u>49 031</u> | 70 | 69 |
| TOTAL | | | | |
| Quantity (No.) | - | - | - | - |
| Value (\$000) | <u>138 988</u> | <u>134 729</u> | - | - |

CANADIAN PRODUCTION

Departmental sources indicate there are approximately 130 establishments manufacturing food processing equipment in Canada. The sector employs an estimated 2,000 persons, and in 1986 shipments were valued at \$71 million.

SELECTED FOOD PROCESSING EQUIPMENT

CANADIAN EXPORTS

Statistics Canada reports domestic exports of \$32.6 million in 1988 and \$29.0 million in 1989 for selected food processing equipment.

| <u>Description</u> | <u>Commodity Code</u> | <u>Total Exports 1988</u> (\$000) | <u>Exports 1989</u> (\$000) | <u>Major Country of Export</u> | |
|---|-----------------------|--|------------------------------------|------------------------------------|---------------------------|
| | | | | <u>% of Total 1988</u> | <u>Value 1989</u> |
| Bakery machinery and machinery for the manufacture of macaroni, spaghetti or similar products | 8438.10 | 8 984 | 6 330 | 80 U.S.A. | 87 U.S.A. |
| Machinery for the manufacture of confectionery, cocoa or chocolate | 8438.20 | 1 628 | 489 | 77 U.S.A. | 100 Other Countries |
| Machinery for sugar manufacture | 8438.30 | 598 | 499 | 60 Costa Rica | 72 Thailand |
| Brewery machinery | 8438.40 | 799 | 715 | 68 U.S.A. | 88 U.S.A. |
| Machinery for the preparation of meat or poultry | 8438.50 | 6 713 | 7 225 | 52 U.S.A. | 68 U.S.A. |
| Machinery for the preparation of fruits, nuts or vegetables | 8438.60 | 818 | 313 | 67 U.S.A. | 100 U.S.A. |
| Machinery not elsewhere specified for the industrial preparation, manufacture of food drink except for extraction or preparation of vegetable fats and oils | 8438.80 | 3 929 | 6 854 | 70 U.S.A. | 72 U.S.A. |
| Parts | 8438.90 | 9 158 | 6 535 | 74 U.S.A. | 65 U.S.A. |
| TOTAL | | 32 627 | 28 960 | | |

NOTE: Quantities not available

SELECTED FOOD PROCESSING EQUIPMENT

MARKET SUMMARY

The Canadian market for all types of food processing machinery is in the order of \$300 million annually. The industry is a strong exporter of products, with over 60 per cent of shipments destined for markets outside of Canada.

Canadian food processing equipment manufacturers recognize the need to develop new lines of specialized equipment and to better serve "niche" markets on an international basis. To date, our export strengths have been in the areas of bakery equipment, meat and poultry processing equipment.

The Canadian food processing sector has the ability to respond quickly to changing market demands. This high degree of flexibility along with the sector's vast experience in producing custom engineered products has greatly contributed to its success in domestic and international markets.

In general, the opportunity for Canadian manufacture of food processing equipment is strong, and could be sought through joint ventures or licensing agreements with established food processing equipment manufacturers.

CANADIAN IMPORTERS

BAKERY MACHINERY AND MACHINERY FOR THE MANUFACTURE OF MACARONI, SPAGHETTI OR SIMILAR PRODUCTS - H.S. CODE 8438.10

In 1988, the principal 10 importers of bakery machinery and machinery for the manufacture of macaroni, spaghetti or similar products accounted for 43 per cent of the total import value.

| <u>Principal Importers</u> (No.) | <u>Cumulative Value</u> (\$000) | <u>Per Cent of Total Value</u> |
|---|--|------------------------------------|
| 5 | 7 644 | 28 |
| 10 | 11 772 | 43 |
| 25 | 18 551 | 68 |
| All Importers (251) | 27 104 | 100 |

The top 40 importers of bakery machinery and machinery for the manufacture of macaroni, spaghetti or similar products during 1988 are listed below in alphabetical order.

| <u>Name</u> | <u>Address</u> | <u>Name</u> | <u>Address</u> |
|---|-------------------|---|----------------------|
| A M F Canada Ltd. | Guelph, Ont. | Kirkland & Rose Ltd. | Richmond, B.C. |
| ABD Distributors Ltd. | Rexdale, Ont. | Kitchens of Sara Lee Canada Ltd. | Bramalea, Ont. |
| APV Crepaco of Canada Ltd. | Weston, Ont. | L & M Manufacturing Co. Ltd. | Downsview, Ont. |
| Berkel Products Company Ltd. | Mississauga, Ont. | Mar Dairy Products Distributing Ltd. | Downsview, Ont. |
| Biscuit Lecler Ltée. | Québec, Qué. | Mark-Crest Foods Ltd. | Richmond, B.C. |
| Bonbon Rio Candy Inc. | Montréal, Qué. | Nabisco Brands Ltd. | Toronto, Ont. |
| Boulangerie Gadoua & Fils Ltée. | Napierville, Qué. | Newtech Equipment Ltd. | Mississauga, Ont. |
| Boulangeries Mansion Inc., Les | Dorval, Qué. | Primo Foods Limited | Weston, Ont. |
| C A Pemberton Company Ltd. | Toronto, Ont. | Pro Pastries Inc. | Mississauga, Ont. |
| Canadian Baker Perkins Ltd. | Brampton, Ont. | Produits Bridor Inc., Les | Boucherville, Qué. |
| Colonial Cookies, A Div. of Beatrice Inter (Canada) Ltd. | Kitchener, Ont. | R J Machinery Inc. | Markham, Ont. |
| Dover Industries Ltd. | Burlington, Ont. | Robin Hood Multifoods Ltd. | Willowdale, Ont. |
| Dreff Bakers Equipment Inc. | Woodbridge, Ont. | Roman Cheese Products Ltd. | Niagara Falls, Ont. |
| Emco USA Bakery Equipment Inc. | Downsview, Ont. | Sovereign Fine Foods Inc. | Oakville, Ont. |
| Entreprises ETMW Ltée., Les | Sherbrooke, Qué. | Union Machinery Division O/B Automated Mach Systems Inc. | Guelph, Ont. |
| Equipement Doyon & Freres Inc. | Liniers, Qué. | W & H Voortman Ltd. | Burlington, Ont. |
| Esperia Machine Corp. | Downsview, Ont. | W P Foods Ltd. | Sherwood Park, Alta. |
| Food Machinery Engineering, O/B 364820 Ont. Ltd. | Concord, Ont. | Weston Bakeries Limited | Kitchener, Ont. |
| Harvest Corporation | Burnaby, B.C. | Windsor Wafers, Div. | |
| Hobart Canada Inc. | Don Mills, Ont. | Beatrice Foods Inc. | Cambridge, Ont. |
| Hobart Cda, Div. Premark Cda Inc. | Mississauga, Ont. | | |

CANADIAN IMPORTERS

MACHINERY FOR THE MANUFACTURE OF CONFECTIONERY, COCOA OR CHOCOLATE - H.S. CODE 8438.20

In 1988, the principal 10 importers of machinery for the manufacture of confectionery, cocoa or chocolate accounted for 82 per cent of the total import value.

| <u>Principal Importers (No.)</u> | <u>Cumulative Value (\$000)</u> | <u>Per Cent of Total Value</u> |
|--|---|------------------------------------|
| 5 | 4 663 | 65 |
| 10 | 5 841 | 82 |
| All Importers (53) | 7 135 | 100 |

The top 25 importers of machinery for the manufacture of confectionery, cocoa or chocolate products during 1988 are listed below in alphabetical order.

| <u>Name</u> | <u>Address</u> | <u>Name</u> | <u>Address</u> |
|--|---------------------|---|---------------------|
| All Bake Confection Ltd. | Georgetown, Ont. | Hershey Chocolate of Canada, A Div. of Hershey Foods Corp. | Etobicoke, Ont. |
| Allan Candy Company, The | Hamilton, Ont. | Interbake Foods Ltd. | Winnipeg, Man. |
| APV Crepaco of Canada Ltd. | Weston, Ont. | Kerr Brothers Ltd. | Toronto, Ont. |
| Bradson Mercantile 1983 Inc. | Richmond, B.C. | M & A Candy Co. Ltd. | Hamilton, Ont. |
| Buhler-Hiag (Canada) Ltd. | Don Mills, Ont. | Monarch Fine Foods, Div. of Thomas J. Lipton Inc. | Rexdale, Ont. |
| Can-Pam Candy Inc. | Woodbridge, Ont. | Nabisco Brands Ltd. | Toronto, Ont. |
| Canadian Baker Perkins Ltd. | Brampton, Ont. | Nestle, Div. of Nestle Enterprises Ltd. | Don Mills, Ont. |
| Carnation Foods Company Ltd. | Carberry, Man. | Popsicle Industries Ltd. | Burlington, Ont. |
| Confiserie Comete Ltée., La, Comet Confectionery Ltd. | St. Hyacinthe, Qué. | Rowntree Mackintosh Canada Ltd. | Toronto, Ont. |
| Dare Foods Limited | Kitchener, Ont. | Separator Engineering Ltd. | Pointe-Claire, Qué. |
| Effem Foods Ltd. | Bolton, Ont. | Sunny Crunch Foods Ltd. | Markham, Ont. |
| European Distribution Canada Inc. | St-Léonard, Qué. | William Neilson Ltd./Ltée. | Toronto, Ont. |
| General Foods Inc. | Don Mills, Ont. | | |

CANADIAN IMPORTERS

MACHINERY FOR SUGAR MANUFACTURE - H.S. CODE 8438.30

In 1988, the principal 6 importers of machinery for sugar manufacture accounted for 100 per cent of the total import value.

| <u>Principal Importers</u> (No.) | <u>Cumulative Value</u> (\$000) | <u>Per Cent of Total Value</u> |
|-------------------------------------|------------------------------------|--------------------------------|
| 6 | 480 | 100 |
| All Importers (6) | 480 | 100 |

The top 6 importers of machinery for sugar manufacture during 1988 are listed below in alphabetical order.

| <u>Name</u> | <u>Address</u> | <u>Name</u> | <u>Address</u> |
|---|----------------------|--------------------------------|-------------------|
| British Columbia Sugar Refining Co. Ltd., The | Vancouver, B.C. | Leaf Confections Ltd. | Scarborough, Ont. |
| Firing Industries Ltd. | St. Catharines, Ont. | Sullivan Strong Scott, Div. of | Downsview, Ont. |
| Lantic Sugar Ltd., Sucre | | Strong Equipment. Corp. | Toronto, Ont. |
| Lantic Ltée. | Montréal, Qué. | TCC Beverages Ltd. | |

CANADIAN IMPORTERS

BREWERY MACHINERY - H.S. CODE 8438.40

In 1988, the principal 5 importers of brewery machinery accounted for 92 per cent of the total import value.

| <u>Principal Importers</u> (No.) | <u>Cumulative Value</u> (\$000) | <u>Per Cent of Total Value</u> |
|---|--|------------------------------------|
| 5 | 2 118 | 85 |
| All Importers (12) | 2 483 | 100 |

The top 12 importers of brewery machinery during 1988 are listed below in alphabetical order.

| <u>Name</u> | <u>Address</u> | <u>Name</u> | <u>Address</u> |
|---|-----------------------|---|-------------------|
| Brasserie Inc., La | Hudson, Qué. | Labatt Brewing Company Ltd. | London, Ont. |
| Canada Malting Company Ltd. | Thunder Bay, Ont. | Molson Western Breweries Ltd. | Calgary, Alta. |
| Carling O'Keefe Breweries of Canada Ltd. | North York, Ont. | Molsons Brewery Ontario Ltd. | Toronto, Ont. |
| Dominion Malting Ltd. | Winnipeg, Man. | Oland Breweries Ltd. | Halifax, N.S. |
| Fleischmann Yeast Inc. | LaSalle, Qué. | Robstan Enterprises Ltd. | Lennoxville, Qué. |
| Island Brewers Ltd. | Charlottetown, P.E.I. | Sleiman Brewing and Malting Co. Ltd. | Guelph, Ont. |

CANADIAN IMPORTERS

MACHINERY FOR THE PREPARATION OF MEAT OR POULTRY - H.S. CODE 8438.50

In 1988, the principal 10 importers of machinery for the preparation of meat or poultry accounted for 48 per cent of the total import value.

| <u>Principal Importers (No.)</u> | <u>Cumulative Value (\$000)</u> | <u>Per Cent of Total Value</u> |
|--|---|------------------------------------|
| 5 | 10 796 | 35 |
| 10 | 14 589 | 48 |
| 30 | 22 140 | 72 |
| All Importers (242) | 30 595 | 100 |

The top 30 importers of machinery for the preparation of meat or poultry during 1988 are listed below in alphabetical order.

| <u>Name</u> | <u>Address</u> | <u>Name</u> | <u>Address</u> |
|-----------------------------------|-------------------|---------------------------------------|--------------------|
| ACA Co-operative Association Ltd. | Kentville, N.S. | J D Sweid & Company Ltd. | Burnaby, B.C. |
| Alfa Food-Service Equipment Ltd. | Weston, Ont. | J M Schneider Inc. | Kitchener, Ont. |
| Aliments Prince Foods Inc. | Princeville, Qué. | Knud Simonsen Industries Ltd. | Rexdale, Ont. |
| Berkel Products Company Ltd. | Mississauga, Ont. | Markham Meat Industries Supplies Inc. | Markham, Ont. |
| Bizerba Canada Inc. | Mississauga, Ont. | Nella Cutlery Service (1983) Ltd. | Stoney Creek, Ont. |
| Britt Food Equipment Inc. | Brampton, Ont. | Pacific Butcher Supply Inc. | Port Moody, B.C. |
| Burns Foods (1985) Ltd. | Calgary, Alta. | Quality Meat Packers Ltd. | Toronto, Ont. |
| C A Pemberton Company Ltd. | Toronto, Ont. | Relser & Co. Inc. | Boston, MA, USA* |
| Canada Packers Inc. | Toronto, Ont. | Shillington Ent. Ltd. | Rexdale, Ont. |
| Canscot Food Machinery Ltd. | Oakville, Ont. | Shopsys Foods, Div. of TJ Lipton Inc. | Mississauga, Ont. |
| Finnie Distributing Ltd. | St. Marys, Ont. | Simon-Johnson Food Equip Ltd. | St. Thomas, Ont. |
| Griffith Laboratories Ltd., The | Scarborough, Ont. | T W Kutter Limited | Avon, MA, USA* |
| H J Langen & Sons Ltd. | Mississauga, Ont. | Viandes Premier 1981 Inc. | Montréal, Qué. |
| Hobart Canada Inc. | Don Mills, Ont. | W Austin Poultry Equipment Ltd. | Stoney Creek, Ont. |
| Hub Meat Packers Ltd. | Moncton, N.B. | Yes Group Inc., The | Markham, Ont. |

* Non resident importer

CANADIAN IMPORTERS

MACHINERY FOR THE PREPARATION OF FRUITS, NUTS OR VEGETABLES - H.S. CODE 8438.60

In 1988, the principal 10 importers of machinery for the preparation of fruits, nuts or vegetables, accounted for 70 per cent of the total import value.

| <u>Principal Importers</u> (No.) | <u>Cumulative Value</u> (\$000) | <u>Per Cent of Total Value</u> |
|---|--|------------------------------------|
| 5 | 2 451 | 57 |
| 10 | 3 151 | 73 |
| 20 | 3 724 | 86 |
| All Importers (82) | 4 325 | 100 |

The top 25 importers of machinery for the preparation of fruits, nuts or vegetables during 1988 are listed below in alphabetical order.

| <u>Name</u> | <u>Address</u> | <u>Name</u> | <u>Address</u> |
|---|--------------------------|---|--------------------------|
| 137072 Canada Ltd. | Hawkesbury, Ont. | Irving Pulp & Paper Ltd. | Saint John, N.B. |
| Blakeslee Foodservice Equipment Inc. (7512625) | Scarborough, Ont. | Kraft Ltd. | Montréal, Qué. |
| Cavendish Farms, Div. of Irving Pulp & Paper Ltd. | Moncton, N.B. | Larry Sommers Ltd. | Toronto, Ont. |
| Chesher Equipment Ltd. | Mississauga, Ont. | McCain Foods Ltd. | Florenceville, N.B. |
| Chisholm Machinery Sales Ltd. | Niagara Falls, Ont. | Michel St-Arneault Inc. | St-Hubert, Qué. |
| Chisolm-Ryder Company of Canada Ltd. | Niagara Falls, Ont. | Millie's Handcooked Potato Chips | Halifax, N.S. |
| Cobi Foods Inc. | Port Williams, N.S. | Mosur Machine Co. Ltd. | Mississauga, Ont. |
| Connery's Riverdale Farms Ltd. | Portage La Prairie, Man. | Nabisco Brands Ltd. | Toronto, Ont. |
| David Lord Limitée | Montréal, Qué. | Nestle, Div. of Nestle Enterprises Ltd. | Don Mills, Ont. |
| Diamond S. Produce Ltd. | Taber, Alta. | Reggin Industries Ltd. | Calgary, Alta. |
| Hobart Canada Inc. | Don Mills, Ont. | Vergers Leahy Inc. | Franklin Centre, Qué. |
| I & S Produce Ltd. | Edmonton, Alta. | W H E Process Systems Ltd. | Weston, Ont. |
| | | Woodstone Foods, Div. of James Richardson & Sons Ltd. | Portage La Prairie, Man. |

CANADIAN IMPORTERS

MACHINERY NOT ELSEWHERE SPECIFIED FOR THE INDUSTRIAL PREPARATION, MANUFACTURE OF FOOD DRINK EXCEPT FOR EXTRACTION OR PREPARATION OF VEGETABLE FATS AND OILS - H.S. CODE 8438.80

In 1988, the principal 10 importers of machinery not elsewhere specified for the industrial preparation, manufacture of food drink except for extraction or preparation of vegetable fats and oils accounted for 38 per cent of the total import value.

| <u>Principal Importers</u> (No.) | <u>Cumulative Value</u> (\$000) | <u>Per Cent of Total Value</u> |
|-------------------------------------|------------------------------------|--------------------------------|
| 5 | 5 636 | 29 |
| 10 | 7 565 | 38 |
| 40 | 13 192 | 67 |
| All Importers (511) | 19 691 | 100 |

The top 40 importers of machinery not elsewhere specified for the industrial preparation, manufacture of food drink except for extraction or preparation of vegetable fats and oils during 1988 are listed below in alphabetical order.

| <u>Name</u> | <u>Address</u> | <u>Name</u> | <u>Address</u> |
|---|---------------------|---|-----------------------|
| Abba North America Ltd. | Halifax, N.S. | FMC of Canada Ltd. | Markham, Ont. |
| Aliments Humpty Dumpty Ltée., Les | Lachine, Qué. | Freshwater Fish Marketing Corp. | Winnipeg, Man. |
| APV Hall Crepaco Inc. | St-Laurent, Qué. | General Mills Canada Inc. | Rexdale, Ont. |
| Baader Canada Ltd. | Dartmouth, N.S. | Griffith Laboratories Ltd., The | Scarborough, Ont. |
| BC Packers Ltd. | Vancouver, B.C. | M V Osprey Ltd. | Mulgrave, N.S. |
| Belmont Meat Products Ltd. | Weston, Ont. | Maple Leaf Mills Ltd. | Toronto, Ont. |
| Bizerba Canada Inc. | Mississauga, Ont. | Maple Lodge Farms Ltd. | Norval, Ont. |
| Blakeslee Foodservice Equipment Inc. | Scarborough, Ont. | MSA Terminals Ltd. | Abbotsford, B.C. |
| Boulangerie Gadoua & Fils Ltée. | Napierville, Qué. | Naleway Foods Ltd. | Winnipeg, Man. |
| Campbell Soup Co. Ltd. | Toronto, Ont. | Nella Cutlery Service (1983) Ltd. | Stoney Creek, Ont. |
| Canada Packers Inc. | Toronto, Ont. | Nova Aqua Sea Ltd. | Glance Bay, N.S. |
| Canadian Fishing Co. Ltd. | Vancouver, B.C. | Ocean Marine Management Corp. | Longueuil, Qué. |
| Canadian Salt Fish Corp. | St. John's, Nfld. | Richmond Fisheries (1983) Ltd. | Richmond, N.S. |
| Chesher Equipment Ltd. | Mississauga, Ont. | Robert Coupe USA Inc. | Jackson, MI, USA* |
| Chisholm Machinery Sales Ltd. | Niagara Falls, Ont. | Robin Hood Multifoods Ltd. | Willowdale, Ont. |
| Danmark Ltd. | Rexdale, Ont. | Scott Bathgate Ltd. | Winnipeg, Man. |
| Drummond Brewing Company Ltd. | Red Deer, Alta. | Stephan Machinery (Canada) Ltd. | Mississauga, Ont. |
| Fishery Products International Ltd. | St. John's, Nfld. | Sullivan Strong Scott, Div. of Strong Equip. Corp. | Downsview, Ont. |
| Fishmae Services Ltd. | Mount Uniacke, N.S. | TCC Beverages Ltd. | Toronto, Ont. |
| | | Wilbert Spice Ltd. | Mississauga, Ont. |

* Non resident importer

CANADIAN IMPORTERS

PARTS - H.S. CODE 8438.90

In 1988, the principal 25 importers of parts for selected food processing equipment accounted for 42 per cent of the total import value.

| <u>Principal Importers</u> (No.) | <u>Cumulative Value</u> (\$000) | <u>Per Cent of Total Value</u> |
|-------------------------------------|------------------------------------|--------------------------------|
| 5 | 8 535 | 18 |
| 15 | 15 529 | 33 |
| 25 | 19 984 | 42 |
| All Importers (1 007) | 47 175 | 100 |

The top 25 importers of parts for selected food processing equipment during 1988 are listed below in alphabetical order.

| <u>Name</u> | <u>Address</u> | <u>Name</u> | <u>Address</u> |
|--|---------------------|--|--------------------|
| Baader Canada Ltd. | Dartmouth, N.S. | Hobart Canada Inc. | Don Mills, Ont. |
| Buhler-Miag (Canada) Ltd. | Don Mills, Ont. | Lockwood Manufacturing Inc. | Brantford, Ont. |
| C A Pemberton Company Ltd. | Toronto, Ont. | Mosur Machine Co. Ltd. | Mississauga, Ont. |
| Canada Packers Inc. | Toronto, Ont. | Nabisco Brands Ltd. | Toronto, Ont. |
| Canscot Food Machinery Ltd. | Oakville, Ont. | Nella Cutlery Service (1983) Ltd. | Stoney Creek, Ont. |
| Chisholm Machinery Sales Ltd. | Niagara Falls, Ont. | Reiser & Co. Inc. | Boston, MA, USA* |
| Coe Manufacturing Company (Canada) Inc., The | Brampton, Ont. | RobinHood Multifoods Ltd. | Willowdale, Ont. |
| Combustion Engineering Canada Inc. | Ottawa, Ont. | Stewart Systems Canada Ltd. | Burlington, Ont. |
| Effem Foods Ltd. | Bolton, Ont. | Stork Werkspoor Canada Ltd. | Candiac, Qué. |
| General Foods Inc. | Don Mills, Ont. | Sullivan Strong Scott, Div. of Strong Equipment Corp. | Downsview, Ont. |
| General Mills Canada Inc. | Rexdale, Ont. | Union Machinery Division, O/B Automated Mach System Inc. | Guelph, Ont. |
| Griffith Laboratories Ltd., The | Scarborough, Ont. | William Neilson Ltd./Ltée. | Toronto, Ont. |
| Hobart Canada, Div. Pre Mark Canada Inc. | Mississauga, Ont. | | |

* Non resident importer

FOREIGN EXPORTERS TO CANADA
BAKERY MACHINERY AND MACHINERY FOR THE
MANUFACTURE OF MACARONI, SPAGHETTI OR
SIMILAR PRODUCTS - H.S. CODE 8438.10

Major exporters to Canada of bakery machinery and machinery for the manufacture of macaroni, spaghetti or similar products during the period of January to September 1989, are listed below in descending order of dollar value by major country of export. The exporters listed are those with imports over \$0.5 million which accounted for 25 per cent of the total value of exports from all countries.

| <u>Country</u> | <u>Exporter</u> | <u>Value of Exports to Canada</u> (\$000) |
|----------------|--------------------|--|
| United Kingdom | Vickers Group Ltd. | 4 431* |
| United States | Hobart Corporation | |
| Italy | Esmach Machine SPA | |
| | World Lines SRL | |
| Netherlands | Machine Fabric | |

* Aggregated to preserve confidentiality of Canadian importers.

FOREIGN EXPORTERS TO CANADA
MACHINERY FOR THE MANUFACTURE OF
CONFECTIONERY, COCOA OR CHOCOLATE
H.S. CODE 8438.20

Major exporters to Canada of machinery for the manufacture of confectionery, cocoa or chocolate during the period of January to September 1989, are listed below in descending order of dollar value by major country of export. The exporters listed are those with imports over \$0.5 million which accounted for 55 per cent of the total value of exports from all countries.

| <u>Country</u> | <u>Exporter</u> | <u>Value of Exports to Canada</u> (\$000) |
|----------------|---------------------|--|
| Denmark | Aastrad Mikroverk) | |
| United Kingdom | Kemutec) | 2 103* |
| | Tourell Gardner) | |

* Aggregated to preserve confidentiality of Canadian importers.

FOREIGN EXPORTERS TO CANADA
MACHINERY FOR THE PREPARATION
OF MEAT OR POULTRY
H.S. CODE 8438.50

Major exporters to Canada of machinery for the preparation of meat or poultry during the period of January to September 1989, are listed below in descending order of dollar value by major country of export. The exporters listed are those with imports over \$0.5 million which accounted for 27 per cent of the total value of exports from all countries.

| <u>Country</u> | <u>Exporter</u> | <u>Value of Exports to Canada (\$000)</u> |
|------------------------------|----------------------------|---|
| France | Robert Reiser Co.) | 2 761* |
| | Lutetia Jaeger France) | |
| | Albert Handtmann Machine) | |
| | Bizebra Werke Wilhelm) | |
| United States Netherlands | Formax Inc.) | 1 589* |
| | Stork Protecon BV) | |
| | Foodcraft Equipment) | 1 230* |
| | Co. Inc.) | |
| | Hobart Corp.) | |

* Aggregated to preserve confidentiality of Canadian importers.

FOREIGN EXPORTERS TO CANADA
MACHINERY NOT ELSEWHERE SPECIFIED FOR THE
INDUSTRIAL PREPARATION, MANUFACTURE OF FOOD DRINK
EXCEPT FOR EXTRACTION OR PREPARATION
OF VEGETABLE FATS AND OILS - H.S. CODE 8438.80

Major exporters to Canada of machinery not elsewhere specified for the industrial preparation, manufacture of food drink except for extraction or preparation of vegetable fats and oils, during the period of January to September 1989, are listed below in descending order of dollar value by major country of export. The exporters listed are those with imports over \$0.5 million which accounted for 19 per cent of the total value of exports from all countries.

| <u>Country</u> | <u>Exporter</u> | <u>Value of Exports to Canada (\$000)</u> |
|--------------------------------|------------------------------|---|
| Federal Republic of Germany | Baader North America Corp.) | |
| United States | Multiplex Co. Inc.) | 2 754* |

* Aggregated to preserve confidentiality of Canadian importers.

FOREIGN EXPORTERS TO CANADA
PARTS FOR SELECTED FOOD PROCESSING EQUIPMENT
H.S. CODE 8438.90

Major exporters to Canada of parts for selected food processing equipment during the period of January to September 1989, are listed below in descending order of dollar value by major country of export. The exporters listed are those with imports over \$0.5 million which accounted for 39 per cent of the total value of exports from all countries.

| <u>Country</u> | <u>Exporter</u> | <u>Value of Exports to Canada</u> (\$000) |
|---|------------------------------|--|
| United States Federal Republic of Germany | Hobart Corp.) | 6 562* |
| | Le Fiell Co.) | |
| | Wenger Manufacturing Inc.) | 1 736* |
| | Baader North America Corp.) | |
| | Stord Bartz America Inc.) | 1 968* |
| | Sprout Bauer Inc.) | |
| | Smith Berger Marine Inc.) | |
| | | |
| | | |

* Aggregated to preserve confidentiality of Canadian importers.

CANADIAN AND FOREIGN TARIFFS

Selected food processing equipment included in this report were dutiable under the following Canadian tariff items.

| <u>Tariff Item</u> | <u>Description of Goods</u> | <u>Tariff Treatment</u> | | |
|--------------------|--|------------------------------------|------------------------------------|-----------------------------|
| | | <u>Most Favoured Nation Tariff</u> | <u>General Preferential Tariff</u> | <u>United States Tariff</u> |
| | Machinery, for the industrial preparation or manufacture of food or drink, other than machinery for the extraction or preparation of animal or fixed vegetable fats or oils. | | | |
| 8438.10 | -Bakery machinery and machinery for the manufacture of macaroni, spaghetti or similar products | | | |
| 8438.10.10 | ---Bakery machinery On and after January 1, 1990 | 9.2% | 2.5% | 5.5% 3.6% |
| 8438.10.20 | ---Machinery for the manufacture of macaroni, spaghetti or similar products | FREE | FREE | FREE |
| 8438.20 | -Machinery for the manufacture of confectionery, cocoa or chocolate | | | |
| 8438.20.10 | ----Chocolate enrobing, tempering or moulding machinery; candy pulling or extruding machinery; chewing gum manufacturing machinery; cotton candy manufacturing machinery ----Chocolate enrobing, tempering or moulding machinery ----Candy pulling or extruding machinery ----Chewing gum manufacturing machinery ----Cotton candy manufacturing machinery | FREE | FREE | FREE |
| 8438.20.90 | ---Other On and after January 1, 1990 | 9.2% | 2.5% | 5.5% 3.6% |
| 8438.30.00 | -Machinery for sugar manufacture On and after January 1, 1991 | 9.2% | 2.5% | 5.5% 3.6% |
| 8438.40.00 | -Brewery machinery On and after January 1, 1991 | 9.2% | 2.5% | 5.5% 3.6% |

CANADIAN AND FOREIGN TARIFFS (Cont'd)

| Tariff Item | Description of Goods | Tariff Treatment | | |
|----------------|--|--------------------------------------|-----------------------------------|----------------------------|
| | | Most Favoured Nation Tariff | General Preferential Tariff | United States Tariff |
| | Machinery, for the industrial preparation or manufacture of food or drink, other than machinery for the extraction or preparation of animal or fixed vegetable fats or oils. | | | |
| 8438.50 | -Machinery for the preparation of meat or poultry | | | |
| 8438.50.10 | ---Plucking, scalding, washing, singeing or eviscerating machinery of a kind used in the preparation of poultry | FREE | FREE | FREE |
| 8438.50.90 | ---Other On and after January 1, 1991 | 9.2% | 2.5% | 5.5% 3.6% |
| 8438.60.00 | -Machinery for the preparation of fruits, nuts or vegetables On and after January 1, 1991 | 9.2% | 2.5% | 5.5% 3.6% |
| 8438.80 | -Other machinery | | | |
| 8438.80.10 | ---Fish skinning, deheading or grinding machines; feed pellet mills; coating drums; extruders or shredders of a kind used in manufacturing processed breakfast cereal foods | FREE | FREE | FREE |
| | ---Other: | | | |
| 8438.80.91 | ---Machinery of a kind used in manufacturing fish meal, liquid fish or fish solubles, stock or poultry food from fish or fish waste On and after January 1, 1991 | 6.8% | FREE | 4% 2.7% |
| 8438.80.99 | ---Other On and after January 1, 1991 | 9.2% | 2.5% | 5.5% 3.6% |
| 8438.90 | -Parts | | | |
| 8438.90.10 | ---Of the goods of tariff item No.8438.10.20, 8438.20.10, 8438.50.10 or 8438.80.10, excluding dies and rolls for feed pellet mills | FREE | FREE | FREE |
| 8438.90.20 | ---Of the goods of tariff item No.8438.80.91 On and after January 1, 1991 | 6.8% | FREE | 4% 2.7% |

CANADIAN AND FOREIGN TARIFFS (Cont'd)

Enquiries concerning tariffs should be directed to the nearest Customs and Excise office or to:

Tariff Programs
Revenue Canada
Customs and Excise
Ottawa, Ontario
K1A 0L5
Tel.: (613) 954-7006
Fax.: (613) 954-2509

UNITED STATES IMPORTS

UNITED STATES' IMPORTS OF SELECTED FOOD PROCESSING EQUIPMENT


Data on U.S. imports for 1989, based on the Harmonized Tariff Schedule as reported by the U.S. Department of Commerce, are shown below:

| <u>U.S. H.S. Code</u> | <u>Description</u> | <u>Total Import Value (\$000)</u> | <u>Canada's Share Value (\$000)</u> | <u>Major Country of Origin to U.S. Country</u> | <u>Value (\$000)</u> | <u>% of Total</u> |
|---------------------------|--|---|---|--|--------------------------|-------------------|
| 8438.10.00.10 | Bakery machinery | 54 947 | 6 993 | Japan | 12 093 | 22 |
| 8438.10.00.90 | Machinery for the manufacture of macaroni or similar products | 22 500 | 591 | Italy | 14 473 | 64 |
| 8438.20.00.00 | Machinery for the manufacture of confectionery, cocoa or chocolate | 31 808 | 595 | Fed. Rep. of Germany | 12 761 | 40 |
| 8438.30.00.00 | Machinery for sugar manufacture | 5 610 | 289 | Norway | 2 410 | 43 |
| 8438.40.00.00 | Brewery machinery | 6 215 | 498 | Fed. Rep. of Germany | 4 381 | 70 |
| 8438.50.00.10 | Meat-and poultry-packing plant machinery | 27 746 | 1 558 | Netherlands | 8 614 | 31 |
| 8438.50.00.90 | Machinery for the preparation of meat or poultry | 33 747 | 3 499 | Fed. Rep. of Germany | 12 523 | 37 |
| 8438.60.00.00 | Machinery for the preparation of fruits, nuts or vegetables | 16 352 | 216 | France | 3 242 | 20 |
| 8438.80.00.00 | Machinery for industrial preparation or manufacture of food or drink, other than machinery for the extract or preparation of animal or fixed vegetable fats or oils, not elsewhere specified | 51 931 | 1 781 | Japan | 21 683 | 42 |
| 8438.90.10.00 | Parts of machinery for sugar manufacture | 6 055 | 330 | Brazil | 1 541 | 25 |

UNITED STATES' IMPORTS OF SELECTED FOOD PROCESSING EQUIPMENT (Cont'd)

| <u>U.S. H.S. Code</u> | <u>Description</u> | <u>Total Imports Value</u> (\$000) | <u>Canada's Share Value</u> (\$000) | <u>Major Country of Origin to U.S. Country</u> | <u>Value</u> (\$000) | <u>% of Total</u> |
|-----------------------|--|---|--|--|-------------------------|-------------------|
| 8438.90.90.00 | Parts of machinery for industrial preparation of food or drink, other than machinery for the extract or preparation of animal or fixed vegetable fats or oils, not elsewhere specified | 94 561 | 2 929 | Fed. Rep. of Germany | 25 817 | 27 |
| | TOTAL | 351 472 | 19 279 | | | |

* Prior to 1989, commodity coding was based on the tariff Schedule of the United States (TSUSA). Starting in January 1989, the Harmonized Commodity Description and Coding System (H.S.) was adopted by the United States. Commencing January 1990, Canada and the United States have been exchanging import data. The above discrepancy between what Canada reports as exports to the United States and what the United States reports as imports from Canada should no longer exist.

[illegible]

INDUSTRY CANADA / INDUSTRIE CANADA



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