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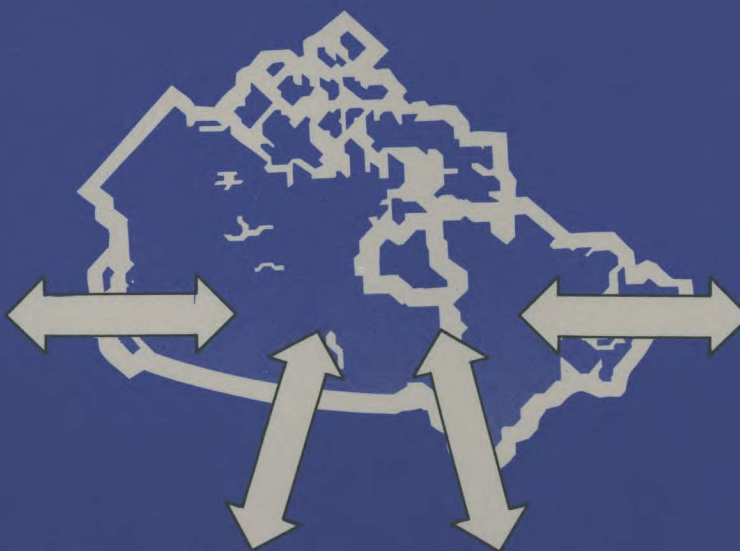
Industrie, Sciences et  
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# MARKET INTELLIGENCE

## ENVELOPES OF PAPER

Pub. No.: 90047-IP

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## FOR MORE INFORMATION PLEASE CONTACT:

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Services to Business Branch  
Industry, Science and Technology Canada  
235 Queen Street  
Ottawa, Ontario  
K1A 0H5  
Tel.: (613) 954-4970

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Service Industries and Consumer Goods  
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Industry, Science and Technology Canada  
235 Queen Street  
Ottawa, Ontario  
K1A 0H5  
Tel.: (613) 954-3100

## REFERENCE SOURCES

Industry, Science and Technology Canada  
Statistics Canada, Tel.: (613) 951-9647  
Revenue Canada, Tel.: (613) 954-6924

## TARIFFS

Enquiries concerning **Canadian** 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) 954-6924  
Fax.: (613) 954-2509

Enquiries concerning tariffs and other  
government trade regulations in **foreign**  
countries should be directed to:

Info Export  
External Affairs  
Ottawa, Ontario  
K1A 0G2  
Tel.: (613) 993-6435 OR  
1-800-267-8376  
Fax.: (613) 996-9709

## 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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## ENVELOPES OF PAPER

### I. INTRODUCTION AND SCOPE

This report is one of a continuing series of market intelligence on specific products and is 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.

### II. CANADIAN IMPORTS

<u>Description and Commodity Code</u>	<u>Imports (\$000)</u>			<u>Major Country of Export to Canada % of Total Value</u>		
	<u>1988</u>	<u>1989</u>	<u>1990<sup>(1)</sup></u>	<u>1988</u>	<u>1989</u>	<u>1990<sup>(1)</sup></u>
Envelopes of paper 4817.10	10 242	13 199	7 651	U.S.A. 97	U.S.A. 98	U.S.A. 98

Lists of 1989 Canadian importers and foreign exporters to Canada are given on pages 7 and 8 respectively.

### III. CANADIAN IMPORTS BY MAJOR COUNTRY OF ORIGIN

<u>Country of Origin</u>	<u>1988</u>		<u>1989</u>	
	<u>Value (\$000)</u>	<u>Import Market Share (%)</u>	<u>Value (\$000)</u>	<u>Import Market Share (%)</u>
United States	9 984	97	12 971	98
United Kingdom	97	1	78	1
Germany, Fed. Rep. of	18	*	41	*
Hong Kong	20	*	38	*
France	11	*	32	*
China	50	*	15	*
The Netherlands	-	-	10	*
Japan	16	*	10	*
Other	46	*	4	*
TOTAL	10 242	100	13 199	100

\* Less than 0.5%

<sup>(1)</sup> January to June

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### IV. CANADIAN PRODUCTION

Statistics Canada reports that there were at least 34 Canadian manufacturers of paper envelopes with shipments of \$177.3 million in 1986 (latest year for which information is available). However, Industry sources estimate that shipments for 1987 and 1988 amounted to \$188.7 million and \$200 million respectively.

### V. CANADIAN EXPORTS

Statistics Canada reports Canadian exports of envelopes of paper in descending order by dollar value for 1989, as follows:

<u>Description and Commodity Code</u>	<u>Country of Export</u>	<u>Exports (\$000)</u>		<u>% of Total Value</u>	
		<u>1988</u>	<u>1989</u>	<u>1988</u>	<u>1989</u>
Envelopes of paper 4817.10	United States	4 144	6 033	88	92
	Bermuda	326	394	7	6
	Australia	2	39	*	1
	Barbados	44	1	1	*
	Other	<u>210</u>	<u>4</u>	<u>4</u>	<u>1</u>
	TOTAL	4 726	6 523	100	100

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\* Less than one per cent

## ENVELOPES OF PAPER

### VI. CANADIAN IMPORTERS - 1989

The principal 25 importers of envelopes of paper accounted for 53 per cent of the total import value during 1989.

<u>Principal Importers</u> (No.)	<u>Cumulative Value</u> (\$000)	<u>Cumulative % of Total Value</u>
5	2 790	21
10	4 423	33
15	5 500	42
25	6 975	53
All Importers (901)	13 199	100

The principal 25 importers are listed below in alphabetical order. The importer is not necessarily the end-user of the product. This list excludes individuals.

<u>Name</u>	<u>Address</u>	<u>Name</u>	<u>Address</u>
Bradford Exchange Co.	Niles, IL, USA*	Kerr Tomlinson Prendergast	
Canadian Direct Mailing Systems Ltd.	Windsor, Ont.	Direct Marketing Inc., c/o	
Canadian Unicef Committee	Toronto, Ont.	The Spectrum Group	Toronto, Ont.
Classic Envelope Co. Ltd.	Richmond, B.C.	Mead Products International	Dayton, OH, USA*
Creative Stock Brokers Inc., The	Winnipeg, Man.	McCall Pattern Co. Ltd., The	Scarborough, Ont.
Duncan Fine Paper Ltd.	Burnaby, B.C.	Nashua Photo Products Ltd.	Regina, Sask.
Envelope Experts Inc.	Vancouver, B.C.	National Geographic Society	Washington, D.C., USA*
Envelope Innova Div. of		O E McIntyre Ltd.	Laval, Qué.
Barbecon Inc.	St. Laurent, Qué.	Picker International Canada Inc.	Bramalea, Ont.
Essential Paper Ltd.	Pickering, Ont.	Publishers Clearing House	Port Washington, N.Y., USA*
Federal Express Corporation,		R L Polk & Co. Ltd.	Toronto, Ont.
c/o Cansica Services Inc.	Mississauga, Ont.	Rainbow Thermographers Co.	Markham, Ont.
Franklin Mint Trading Corp., The	Mississauga, Ont.	Sunset Thermographers Ltd.	Winnipeg, Man.
Independent Business Products	Toronto, Ont.	Texcom Marketing Inc.	Markham, Ont.
Inter City Papers Ltd.	LaSalle, Qué.		

\* Non resident importer



## ENVELOPES OF PAPER

### VII. U.S. FOREIGN EXPORTERS TO CANADA

1989

Major exporters to Canada of envelopes of paper are listed in descending order of dollar value. These exporters accounted for 64 per cent of the total value of Canadian imports during 1989.

<u>Name of Foreign Exporter</u>		Value of Exports to Canada
		<u>1989</u> (\$000)
Mailwell Envelope Co.		776
Northwest Envelope Co.		618
Niagara Envelope Co.		556
Publishers Clearing House	)	1 007*
Williamhouse Regency Inc.	)	
International Envelope Co.		440
Bradford Exchange Co.	)	813*
American Envelope Co.	)	
Cyril Scott Co.		361
Mead Products Int'l.		327
Atlantic Envelope Co.		323
Oles Envelope Corp.	)	630*
Griffin Envelope Inc.	)	
Franklin Printing		278
Westvaco Envelope Div.		258
Manville Forest Products Co.		254
McCall Pattern Co.	)	442*
Quality Packaging Supply	)	

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\* Aggregated to preserve confidentiality of Canadian importers.

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### VII. U.S. FOREIGN EXPORTERS TO CANADA (Cont'd)

1989

<u>Name of Foreign Exporter</u>	<u>Value of Exports to Canada</u>
	<u>1989</u> (\$000)
Old Colony Envelope Co.	193
Unicef Greeting Cards Warehouse ) Service Envelope Mfg. Co. )	361*
Fine Impressions ) American Fiber Envelope Co. )	288*
New England Envelope Mfg.	136
Tempo Graphics	125
Berlin & Jones Co. Inc.	120
Webcraft Technologies Inc.	98
American Direct Marketing	83

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\* Aggregated to preserve confidentiality of Canadian importers.

## ENVELOPES OF PAPER

### VIII. MARKET SUMMARY

It is estimated that in 1989, Canadians consumed about 8 billion envelopes, valued at roughly \$210 million at manufacturers' net selling price.

Envelopes come in a wide range of sizes and shapes. They can be classified from various viewpoints. From the viewpoint of style, envelopes have either an open side or an open end. Another classification could be mailing or non-mailing. The shape of the flap is an important functional consideration. Some envelopes require a gummed flap while others have a string and button or a metal clasp. Envelopes can be constructed from a variety of base materials, including paper and plastic. The process used for manufacturing envelopes is relatively simple.

Market demand for envelopes has been growing at a relatively modest rate in the last few years, reflecting in a large measure the adverse effects of increasing postal rates and the growing popularity of electronic mail and message systems. This trend is expected to continue over the medium term. However, above average growth is expected for "specialty" envelopes.

## ENVELOPES OF PAPER

### IX. CANADIAN AND FOREIGN TARIFFS

Envelopes of paper included in this report are dutiable under the following Canadian tariff item.

<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>
4817.10.00	-Envelopes On and after January 1, 1991	10.2%	6.5%	6.1% 4%

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

Tariff Programs  
Revenue Canada  
Customs and Excise  
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K1A 0L5  
Tel.: (613) 954-6924  
Fax.: (613) 954-2509

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