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# MARKET INTELLIGENCE

## GOLF SHAFTS

Pub. No.: 90055-IP

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## REFERENCE SOURCES

Industry, Science and Technology Canada  
Statistics Canada, Tel.: (613) 951-9647  
Revenue Canada, Tel.: (613) 954-6949  
U.S. Department of Commerce,  
Bureau of the Census  
Tel.: (301) 763-7754

## TARIFFS

Enquiries concerning **Canadian** tariffs  
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Revenue Canada  
Customs and Excise  
Ottawa, Ontario K1A 0L5  
Tel.: (613) 954-6949

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Info Export  
External Affairs  
Ottawa, Ontario  
K1A 0G2  
Tel.: (613) 993-6435 OR  
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.

### Canada - U.S. Exchange Rate

The Bank of Canada exchange rates were used to convert U.S. imports reported in \$U.S. to \$Cdn.

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## GOLF SHAFTS

### I. INTRODUCTION AND SCOPE

This report is one of a continuing series of market intelligence reports on specific products and is designed to increase 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). The following is a list of all Harmonized System (H.S.) import commodity codes dealing with golf equipment. This report deals only with golf shafts.

#### Description

#### H.S. Commodity Codes Analyzed

Articles and equipment for gymnastics, athletics, other sports (including table-tennis) or outdoor games, not specified or included elsewhere in this Chapter; swimming pools and paddling pools (95.06)

#### -Golf clubs and other golf equipment:

- Clubs, complete (9506.31)
- Individual golf clubs (9506.31.00.10)
- Sets of golf clubs (9506.31.00.20)

- Balls (9506.32)
- Hollow, for practice (9506.32.10.00)
- Other (9506.32.90.00)

- Other (9506.39)
- Shafts of steel or graphite (9506.39.10)

- Of seamless steel, not plated 9506.39.10.10
- Other 9506.39.10.90

- Shafts of wood; heads of woods 9506.39.20.00

- Forged heads of iron or steel, not ground, polished, plated or otherwise finished (9506.39.30.00)

- Other (9506.39.90)
- Grips (9506.39.90.10)
- Other parts of golf clubs (9506.39.90.20)
- Other (9506.39.90.90)

Total imports of golf clubs and other golf equipment were valued at \$56.4 million in 1989. Imports of golf shafts as reported on H.S. Commodity Codes examined for the year 1989 amounted to \$11.7 million or 20.7 per cent of all imports.

## GOLF SHAFTS

### II. SUMMARY OF CANADIAN IMPORTS

<u>Description and Commodity Code</u>	<u>Imports (\$000)</u>			<u>Major Country of Export to Canada</u>		
	<u>1988</u>	<u>1989</u>	<u>1990 Jan.-Mar.</u>	<u>1988</u>	<u>% of Total Value 1989</u>	<u>1990 Jan.-Mar.</u>
Shafts of seamless steel, not plated 9506.39.10.10	1 578	1 664	886	U.S.A. 64	U.S.A. 68	U.S.A. 76
Shafts, other 9506.39.10.90	7 697	6 316	2 030	U.S.A. 86	U.S.A. 77	U.S.A. 82
Shafts of wood; heads of woods 9506.39.20.00	<u>3 684</u>	<u>3 677</u>	<u>1 225</u>	U.S.A. 49	U.S.A. 67	Taiwan 54
TOTAL	12 959	11 654	4 141			

## GOLF SHAFTS

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

#### GOLF SHAFTS OF SEAMLESS STEEL, NOT PLATED (9506.39.10.10)

<u>Country of Origin</u>	<u>1988</u>		<u>1989</u>	
	<u>Value</u> (\$000)	<u>Import Market Share</u> (%)	<u>Value</u> (\$000)	<u>Import Market Share</u> (%)
United States	1 024	64	1 146	68
United Kingdom	337	21	241	14
Japan	208	13	202	12
Taiwan	9	*	66	3
U.S.S.R.	-	-	8	*
TOTAL	1 578	100	1 664	100

#### GOLF SHAFTS, OTHER (9506.39.10.90)

<u>Country of Origin</u>	<u>1988</u>		<u>1989</u>	
	<u>Value</u> (\$000)	<u>Import Market Share</u> (%)	<u>Value</u> (\$000)	<u>Import Market Share</u> (%)
United States	6 621	86	4 889	77
Japan	621	8	503	7
Taiwan	224	2	643	10
United Kingdom	217	2	279	4
U.S.S.R.	11	*	-	-
Korea, South	2	*	2	*
TOTAL	7 697	100	6 316	100

\* Less than one per cent



## GOLF SHAFTS

### III. CANADIAN IMPORTS BY MAJOR COUNTRIES OF ORIGIN (Cont'd)

#### GOLF SHAFTS OF WOOD; HEADS OF WOODS (9506.39.20.00)

<u>Country of Origin</u>	<u>1988</u>		<u>1989</u>	
	<u>Value</u> (\$000)	<u>Import Market Share</u> (%)	<u>Value</u> (\$000)	<u>Import Market Share</u> (%)
United States	1 824	49	2 467	67
Taiwan	1 661	45	1 144	31
Japan	174	4	65	1
Hong Kong	12	*	-	-
Peoples Republic of China	9	*	-	-
United Kingdom	<u>5</u>	<u>*</u>	<u>1</u>	<u>-</u>
TOTAL	3 684	100	3 677	100

\* Less than one per cent

### IV. CANADIAN PRODUCTION

At the present time golf shafts are not manufactured in Canada.

## GOLF SHAFTS

### V. CANADIAN EXPORTS

Statistics Canada does not provide specific export data for golf shafts. However exports of golf clubs and other golf equipment are as follows:

<u>Description and Commodity Code</u>	<u>Total Exports</u>		<u>Major Country Importing from Canada</u>	
	<u>1988</u>	<u>1989</u>	<u>% of Total Value 1988</u>	<u>1989</u>
<b>Golf clubs and other golf equipment:</b>				
•Clubs complete 9506.31				
Quantity (No.)	121 284	71 451	U.S.A.	U.S.A.
Value (\$000)	2 830	1 397	94	77
•Balls 9506.32				
Quantity (Dozen)	9 540	4 635	U.S.A.	U.S.A.
Value (\$000)	130	50	99	100
•Other 9506.39				
Quantity	N.A.	N.A.	U.S.A.	U.S.A.
Value (\$000)	<u>1 967</u>	<u>1 183</u>	81	82
<b>TOTAL VALUE (\$000)</b>	<b>4 927</b>	<b>2 630</b>		

## GOLF SHAFTS

### VI. CANADIAN IMPORTERS - 1988

#### GOLF SHAFTS OF SEAMLESS STEEL, NOT PLATED (9506.39.10.10)

There were 42 known importers of golf shafts, seamless steel, not plated, in 1988. The principal 15 importers accounted for 88 per cent of the total imports.

<u>Principal Importers</u> (No.)	<u>Cumulative Value</u> (\$000)	<u>Per Cent of Total Value</u>
3	871	52
6	1 148	68
15	1 475	88
25	1 572	94
All Importers (42)	1 664	100

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

#### Name

#### Address

Accuform Golf Limited	Toronto, Ont.
Action Golf Inc.	Ste-Rose, Qué.
Allreds Golf School & Pro Shop	Calgary, Alta.
Brian Johnson Golf Services Inc.	Agincourt, Ont.
British Silbak Recreations Ltd.	Surrey, B.C.
Calgary Custom Club	Calgary, Alta.
Camber Golf Equipment Ltd.	Calgary, Alta.
Chuck Browns Golf Ltd.	Ottawa, Ont.
Cosmopolitan Industries Ltd.	Saskatoon, Sask.
Cygnat Enterprises	Mississauga, Ont.
David R Hands Enterprises Ltd.	Nepean, Ont.
Dynacast Sports Inc.	Scarborough, Ont.
Frikon Industries Ltd.	Mississauga, Ont.
Golf Trend Inc.	Mississauga, Ont.
Indoor Golf World O B Prestons	Edmonton, Alta.
Jim Morrison Ltd.	Agincourt, Ont.
Kim Wilkovich Golf Sales Ltd.	High River, Alta.
Par-Fore Games Inc	North Vancouver, B.C.
Queensway Machine Products, The	Toronto, Ont.
Rampion Enterprises Ltd.	Richmond, B.C.
Resinger's Custom Golf & Repair of B.C.	Richmond, B.C.
Segen Corp.	Calgary, Alta.
Sportlines International Limited	Toronto, Ont.
Waterford Sports, O/B Canarinda Manufacturing	Waterford, Ont.
Wellite Industries Ltd.	St Laurent, Qué.

## GOLF SHAFTS

### VI. CANADIAN IMPORTERS - 1988 (Cont'd)

#### GOLF SHAFTS, OTHER (9506.39.10.90)

There were 77 known importers of golf shafts, other, in 1988. The principal 15 importers accounted for 86 per cent of the total imports.

<u>Principal Importers</u> (No.)	<u>Cumulative Value</u> (\$000)	<u>Per Cent of Total Value</u>
3	3 290	42
6	4 913	63
15	6 663	86
25	7 202	93
All Importers (77)	7 697	100

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

<u>Name</u>	<u>Address</u>
A E Golf Mfg. Ltd.	Montréal, Qué.
Action Golf Inc.	Ste-Rose, Qué.
Alta Pro Golf Inc.	Edmonton, Alta.
Amulette Golf Manufacturing Inc.	Calgary, Alta.
Brian Johnson Golf Services Inc.	Agincourt, Ont.
Cosmopolitan Industries Ltd.	Saskatoon, Sask.
D H Enterprises	Dunnville, Ont.
Daiwa Canada Ltd.	Burnaby, B.C.
Fletcher Leisure Group Inc.	Montréal, Qué.
Frikon Industries Ltd.	Mississauga, Ont.
Golf Tree Inc.	Scarborough, Ont.
Golf Trend Inc.	Mississauga, Ont.
Hillerich & Bradsby of Canada Ltd.	Wallaceburg, Ont.
Jim Morrison Ltd.	Agincourt, Ont.
Lemington Golf	London, Ont.
North Western Golf Enterprises Inc.	Markham, Ont.
Northwestern Golf Enterprises	Chicago, IL, USA*
Rampion Enterprises Ltd.	Richmond, B.C.
Robert Tate Sales Ltd.	Delta, B.C.
Sam Yawney Golf Shop Inc.	Sudbury, Ont.
Segen Corp.	Calgary, Alta.
Spalding Canada Div. of Spalding & Evenflo Canada Inc.	Downsview, Ont.
Sportlines International Ltd.	Toronto, Ont.
Torkos Bros.	Toronto, Ont.
Wilson Sports Equipment Canada Ltd.	Belleville, Ont.

\* Non-resident importer

## GOLF SHAFTS

### VI. CANADIAN IMPORTERS - 1988 (Cont'd)

#### GOLF SHAFTS OF WOOD; HEADS OF WOODS (9506.39.20.00)

There were 68 known importers of shafts and heads made of wood in 1988. The principal 15 importers accounted for 88 per cent of the total imports.

<u>Principal Importers</u> (No.)	<u>Cumulative Value</u> (\$000)	<u>Per Cent of Total Value</u>
5	1 874	50
10	2 901	78
15	3 278	88
25	3 560	96
All Importers (68)	1 664	100

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

#### Name

#### Address

Action Golf Inc.  
 Brian Johnson Golf Services Inc.  
 Camber Golf Equipment Ltd.  
 Cosmopolitan Industries Ltd.  
 D H Enterprises  
 Daiwa Canada Ltd.  
 Fletcher Leisure Group Inc.  
 Frikon Industries Ltd.  
 Golf Tree Inc.  
 Golf Trend Inc.  
 Hillerich & Bradsby of Canada Ltd.  
 Indoor Golf World Ltd.  
 Isovibe Inc.  
 Jim Morrison Ltd.  
 Lemington Golf  
 Northwestern Golf Enterprises  
 Oshawa Golf Repair  
 Rampion Enterprises Ltd.  
 Resinger's Custom Golf & Repair of B.C.  
 Robert Tate Sales Ltd.  
 S and F Trading Co. Ltd.  
 Segen Corp.  
 Spalding Canada, Div. of Spalding & Evenflo  
 Canada Inc.  
 Sugi Canada Ltée.  
 Torkos Bros.  
 Wilson Sports Equipment Canada Ltd.

Ste-Rose, Qué.  
 Agincourt, Ont.  
 Calgary, Alta.  
 Saskatoon, Sask.  
 Dunnville, Ont.  
 Burnaby, B.C.  
 Montréal, Qué.  
 Mississauga, Ont.  
 Scarborough, Ont.  
 Mississauga, Ont.  
 Wallaceburg, Ont.  
 Edmonton, Alta.  
 Ottawa, Ont.  
 Agincourt, Ont.  
 London, Ont.  
 Chicago, IL, USA\*  
 Oshawa, Ont.  
 Richmond, B.C.  
 Richmond, B.C.  
 Delta, B.C.  
 Markham, Ont.  
 Calgary, Alta.  
 Downsview, Ont.  
 Ste-Rose, Qué.  
 Toronto, Ont.  
 Belleville, Ont.

\* Non-resident importer

## GOLF SHAFTS

### VII. FOREIGN EXPORTERS TO CANADA - 1989

#### GOLF SHAFTS OF SEAMLESS, STEEL, NOT PLATED (9506.39.10.10)

Major exporters to Canada of seamless, steel, not plated, golf shafts, are listed by major country of origin in descending order of dollar value. These exporters accounted for 85 per cent of the total value of Canadian imports during 1989.

The names of the foreign companies are as captured on the computer system and may not be the full legal corporate name. A foreign company may appear in the source several different ways. Attempts are made to consolidate all various entries into one company. The value associated with any given company is deemed to be the minimum value.

<u>Country of Origin</u>	<u>Name of Foreign Exporter</u>	<u>Value of Exports to Canada 1989 (\$000)</u>
United States	True Temper Corp.	434
	Apollo Golf Inc.	205
	Brunswick Golf Corp.	186
	Aldila Inc.	107
United Kingdom	Apollo Golf Inc.	241
Japan	Tatsumori Ltd. )	
Taiwan	Yu Tai )	
	Unison Golf )	242*
	Dyna Score Precision Golf )	
TOTAL		1 415

\* Aggregated to preserve confidentiality of Canadian importers.

## GOLF SHAFTS

### VII. FOREIGN EXPORTERS TO CANADA - 1989 (Cont'd)

#### GOLF SHAFTS, OTHER (9506.39.10.90)

Major exporters to Canada of golf shafts, other, are listed by major country of origin in descending order of dollar value. These exporters accounted for 84 per cent of the total value of Canadian imports during 1989.

The names of the foreign companies are as captured on the computer system and may not be the full legal corporate name. A foreign company may appear in the source several different ways. Attempts are made to consolidate all various entries into one company. The value associated with any given company is deemed to be the minimum value.

<u>Country of Origin</u>	<u>Name of Foreign Exporter</u>	Value of Exports to Canada
		<u>1989</u> (\$000)
United States	True Temper Corp.	2 349
	Northwestern Golf Co. )	1 388*
	Aldila Inc. )	
	Apolo Golf	151
	Brunswick Golf	147
Taiwan	Cobra Golf )	536*
	Maibar Corp. )	
	Taiwan Strong Sporting Co. )	
	Kunnan Sports )	
Japan	Daiwa Seiko )	503*
	Tatsumori Ltd. )	
United Kingdom	Appolo Golf	<u>279</u>
TOTAL		5 353

\* Aggregated to preserve confidentiality of Canadian importers.

## GOLF SHAFTS

### VII. FOREIGN EXPORTERS TO CANADA - 1989 (Cont'd)

#### GOLF SHAFTS OF WOOD; HEADS OF WOODS (9506.39.20.00)

Major exporters to Canada of shafts of wood; heads of woods, are listed by major country of origin in descending order of dollar value. These exporters accounted for 75 per cent of the total value of Canadian imports during 1989.

The names of the foreign companies are as captured on the computer system and may not be the full legal corporate name. A foreign company may appear in the source several different ways. Attempts are made to consolidate all various entries into one company. The value associated with any given company is deemed to be the minimum value.

<u>Country of Origin</u>	<u>Name of Foreign Exporter</u>	<u>Value of Exports to Canada 1989 (\$000)</u>
United States	Taylor Made Golf Co.	1 909*
	Northwestern Golf	
	Spalding Co.	166*
	Classic Golf Co.	
Taiwan	JKM International Sports & Leisure	322
	Peer First Int'l	378*
	Cobra Golf	
	Union Precision Casting	
	Biena Golf Co. Ltd.	
	Mason Int'l Corp.	
TOTAL		2 775

\* Aggregated to preserve confidentiality of Canadian importers.



## GOLF SHAFTS

### VIII. CANADIAN AND FOREIGN TARIFFS

Golf shafts included in this report are 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>
	Articles and equipment for gymnastics, athletics, other sports (including table-tennis) or outdoor games, not specified or included elsewhere in this Chapter; swimming pools and paddling pools (95.06)			
9506.39.10	---Shafts of steel or graphite	FREE	FREE	FREE
9506.39.20	---Shafts of wood; heads of woods	4%	2.5%	3.6%
	On and after January 1, 1990			3.2%
	On and after January 1, 1991			2.8%

#### TARIFF ARRANGEMENTS AND FOREIGN COUNTRIES OF EXPORT

Exporting countries which qualifies for the Most Favoured Nation tariff treatment: Japan, Taiwan, United Kingdom and U.S.S.R.

Exporting countries which qualifies for the Most Favoured Nation tariff treatment or General System of Preference tariff treatment \*: China, Peoples Republic of Hong Kong and Korea, South.

\* NOTE: In order to qualify for the General System of Preference, a special certificate of origin is required.

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) 954-6949  
Fax.: (613) 954-2509

#### FOREIGN COUNTRIES

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

## GOLF SHAFTS

### IX. UNITED STATES IMPORTS

The United States Department of Commerce does not report imports of golf shafts separately. However, their imports of golf clubs and other golf equipment are as follows:

#### CANADA'S SHARE OF U.S. IMPORTS - 1989

H.S. <sup>1</sup> Product Code	Description	Quantity		Value (\$000) <sup>2</sup>		Value % From Canada
		Total	From Canada	Total	From Canada	
	Golf clubs and other golf equipment; parts and accessories thereof:					
		(No.)				
9506.31.00.00	Golf clubs complete	1 590 617	103 054	25 943	2 057	7
		(Dozen)				
9506.32.00.00	Golf balls	3 368 219	5 291	26 458	44	*
9506.39.00.60	Parts of golf clubs	-	-	237 047	319	*
9506.39.00.80	Other golf equipment, parts and accessories thereof	-	-	39 554	975	2

<sup>1</sup> 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. Therefore, as of January 1990 data, any 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.

<sup>2</sup> A conversion factor of 1.1842 was used to convert 1989 U.S. imports value to \$Cdn.

\* Less than one per cent

## GOLF SHAFTS

### X. MARKET OVERVIEW

Currently there are no golf shaft manufacturers in Canada. Shafts are imported primarily from the USA and the Far East. Altogether around \$12 million of shafts were imported in 1989. Although the seamless steel shaft segment represents a lower dollar share of the market it is the largest in unit volume. Its appeal is to the more price-conscious, entry-level and recreational golfer.

Several trends have developed in the shaft segment. The use of composites in manufacturing is rapidly gaining ground and shafts made from various steel alloys, fibreglass, and graphite are becoming more prevalent. In addition, at the assembly level, "bore through" shafts appear to have gained some credence. This process involves extending the shaft through the hosel to the sole of the club and is said to provide a much better feel especially in metal woods.

The Canadian golf club industry is primarily assembly oriented. The grips, shafts, and most of the heads are imported and subsequently adapted, finished, plated, assembled, and packaged in Canada. Although there are a number of medium and smaller size custom golf club manufacturers/assemblers, the volume market is dominated by US-owned Canadian-based assemblers such as Northwestern, Hillerich and Bradsby, Wilson, and Macgregor. The USA is the major source of completed clubs with over 80 per cent of the Canadian import market and over 60 per cent of imported parts and components. A significant portion of these imports are supplied by the American parents of major Canadian assemblers.

In respect of exports, the American market absorbs about 80 per cent of total golf equipment exports of \$2.6 million. Because of its assembly orientation, industry exports could be affected by duty drawback changes under the FTA. Effective January 1, 1994, duty drawback will no longer be allowed on third country components incorporated into products subsequently exported to the USA.

After several years of exceptional growth, there are signs of slower but steadier increases in the Canadian golf equipment market. Some of this can be attributed to the slow down in metal woods sales as the market becomes saturated. However, public participation continues to increase and it is estimated that over 2.5 million Canadians played golf in 1989.

There are a number of demographic trends and characteristics which continue to fuel participation increases. Firstly, although over 70 per cent of golfers are male, recent US studies have indicated that 40 per cent of new golfers are female. Secondly, while there is no question that golf fits very well as a recreational activity for the aging population, the golfing market growth is also being fuelled by an influx of younger golfers. In the USA, studies have shown

## GOLF SHAFTS

### X. MARKET OVERVIEW (Cont'd)

that between 1985 and 1988 about 50 per cent of new golfers were between the ages of 20-40. In addition, several other factors have contributed to keeping golf among the top recreational activities. Most notable is the general aging of a substantial portion of the population incorporating demographic characteristics to which golfing would appeal: an affluent economy; increasing leisure time; and more emphasis on individual recreational activities. The golf market is expected to be influenced by these dynamic factors for a number of years.

Opportunities in product improvements and technological advances are expected to increase as golf participation grows and the use of composites becomes more prevalent in the industry.

