

HF3221

.A1

C3

91005 c.2



Industry, Science and
Technology Canada

Industrie, Sciences et
Technologie Canada

MARKET INTELLIGENCE

CRANES MOUNTED ON ROAD VEHICLES

Pub. No.: 91005-IP

March 1991



Canada

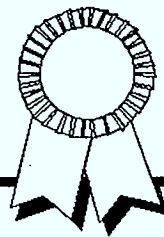


CRANES MOUNTED ON ROAD VEHICLES

Pub. No.: 91005-IP

March 1991

**1990 ISTC
Quality
Award**



Prepared by:
Robert Strachan
Market Intelligence Division
Services to Business Branch
Industry, Science and Technology Canada
235 Queen Street
Ottawa, Ontario
K1A 0H5
Tel.: (613) 954-4970
Fax.: (613) 954-5463

INDUSTRY, SCIENCE AND
TECHNOLOGY CANADA
LIBRARY

JUN 20 1991

BIBLIOTHÈQUE
INDUSTRIE, SCIENCES ET
TECHNOLOGIE CANADA

REFERENCE SOURCES

Industry, Science and Technology Canada
Statistics Canada, Tel.: (613) 951-9647
Revenue Canada, Tel.: (613) 954-6994
U.S. Department of Commerce,
Bureau of the Census
Tel.: (301) 763-7754

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) 954-6994
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.

Canada - U.S. Exchange Rate

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

11 SEP 1988
11 SEP 1988
11 SEP 1988

TABLE OF CONTENTS

	PAGE
I. Introduction and Scope	5
II. North American Imports - 1989	6
III. Summary of Canadian Imports	7
- By 1990 Province of Customs Clearance	7
IV. Canadian Imports by Major Countries of Origin	8
V. Canadian Shipments	9
VI. Canadian Exports	9
VII. Canadian Importers - 1989	10
VIII. Foreign Exporters to Canada - 1989	11
IX. Canadian Suppliers	12
X. Canadian and Foreign Tariffs	14
XI. United States' Imports - 1989	15
XII. Market Overview	16



CRANES MOUNTED ON ROAD VEHICLES

I. INTRODUCTION AND SCOPE

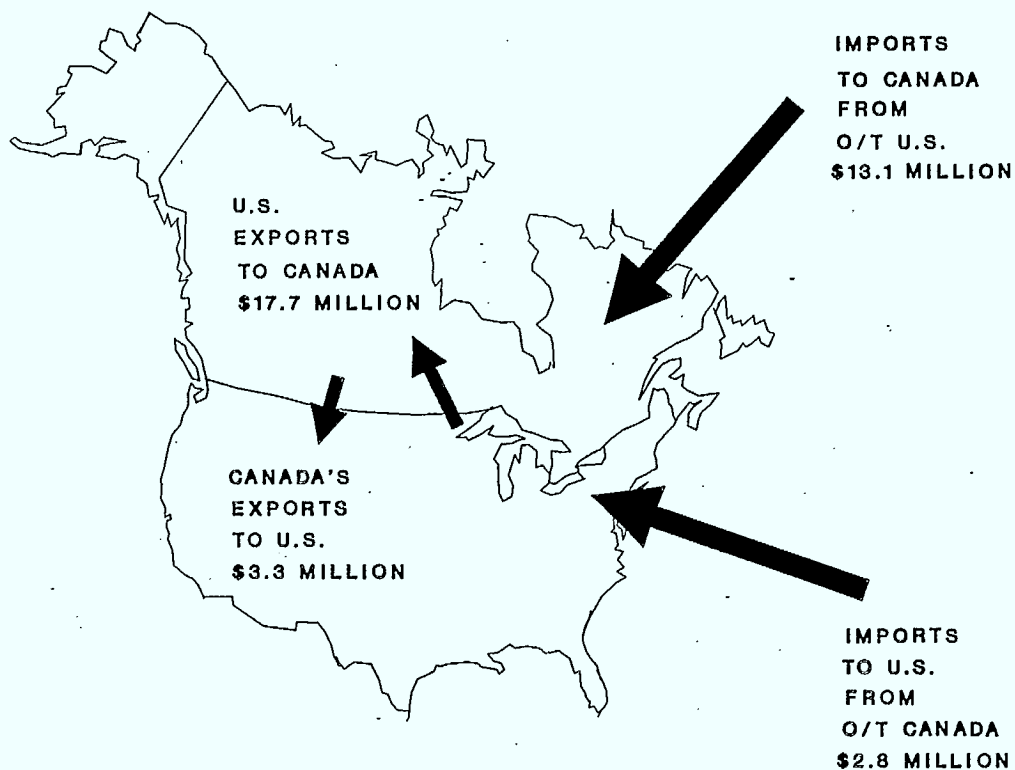
This is one of a continuing series of market intelligence reports designed to increase business awareness of the potential existing for production in Canada and to assist businesses and other organizations in their market research of specific products. The detailed information provided in these reports supports studies by organizations seeking to expand existing production lines, change individual product characteristics or engage in new manufacturing investment in Canada. The coverage of a market intelligence report is developed in close consultation with the client, and is tailored to meet their specific requirements. It is important to emphasize that this report does not attempt any assessment as to the feasibility of competing in a particular market.

This report is based on data from several sources for the following Harmonized System (H.S.) commodity code:

<u>Description</u>	<u>H.S. Commodity Code Analyzed</u>
Cranes designed for mounting on road vehicles	8426.91

CRANES MOUNTED ON ROAD VEHICLES (H.S. 8426.91)

II. NORTH AMERICAN IMPORTS - 1989



North American Imports - \$15.9 Million*

* Excludes Canada - U.S. bilateral trade; Mexico

CRANES MOUNTED ON ROAD VEHICLES

(H.S. 8426.91)

III. SUMMARY OF CANADIAN IMPORTS

Description and Commodity Code	1988		Total Imports 1989		1990		Major Country of Export to Canada % of Total Value		
	<u>Quantity</u>	<u>Value</u>	<u>Quantity</u>	<u>Value</u>	<u>Quantity</u>	<u>Value</u>	<u>1988</u>	<u>1989</u>	<u>1990</u>
	(No.)	(\$000)	(No.)	(\$000)	(No.)	(\$000)			
Cranes designed for mounting on road vehicles	1 056	30 262	1 788	30 788	1 359	25 323	U.S. 50	U.S. 57	U.S. 61

1990 CANADIAN IMPORTS BY PROVINCE OF CUSTOMS CLEARANCE

	<u>Nfld.</u>	<u>P.E.I.</u>	<u>N.S.</u>	<u>N.B.</u>	<u>Qué.</u>	<u>Ont.</u>	<u>Man.</u>	<u>Sask.</u>	<u>Alta.</u>	<u>B.C.</u>	<u>All Provinces</u> ⁽¹⁾
Quantity (No.)	0	1	9	44	133	782	27	59	134	170	1 359
Value (\$000)	0	4	3	717	3 323	14 358	191	1 759	2 101	2 752	25 323

(1) Includes Yukon and Northwest Territories

CRANES MOUNTED ON ROAD VEHICLES

(H.S. 8426.91)

IV. CANADIAN IMPORTS BY MAJOR COUNTRIES OF ORIGIN

Country of Origin	1988				1989				1990			
	<u>Quantity</u> (No.)	<u>Value</u> (\$000)	<u>Import Market Share</u> (% based on value)	<u>Average Unit Price</u> (\$000)	<u>Quantity</u> (No.)	<u>Value</u> (\$000)	<u>Import Market Share</u> (% based on value)	<u>Average Unit Price</u> (\$000)	<u>Quantity</u> (No.)	<u>Value</u> (\$000)	<u>Import Market Share</u> (% based on value)	<u>Average Unit Price</u> (\$000)
United States	533	14 988	50	28	887	17 692	57	20	791	15 379	61	19
Sweden	253	4 236	14	17	341	4 670	15	14	231	3 163	12	14
Italy	17	246	1	14	211	3 141	10	15	118	2 280	9	19
Spain	71	1 854	6	26	133	1 884	6	14	48	1 523	6	32
Austria	2	56	*	28	15	249	1	17	62	1 190	5	19
Fed. Rep. of Germany	80	2 572	8	32	125	2 486	8	20	42	1 124	4	27
United Kingdom	31	522	2	17	39	509	2	13	26	350	1	13
Denmark	27	429	1	16	35	138	*	4	38	273	1	7
Finland	10	2 872	9	287	0	0	0	0	3	41	*	14
Australia	30	2 467	8	82	2	20	*	10	0	0	0	0
Other	2	20	*	10	0	0	0	0	0	0	0	0
TOTAL	1 056	30 262	100	29	1 788	30 788	100	17	1 359	25 323	100	19

* Less than 0.5 per cent

91005-IP

CRANES MOUNTED ON ROAD VEHICLES

(H.S. 8426.91)

V. CANADIAN SHIPMENTS

Statistics Canada reports that there were at least 27 Canadian manufacturers of cranes and derricks with shipments of \$108 million in 1986 (latest year for which data are available).

Any enquiries and/or comments regarding Canadian shipments should be directed to:

Statistics Canada
Industry Division
Survey of Manufactures Section
Ottawa, Ontario
K1A 0T6
Tel.: (613) 991-3523

Source: Catalogue #42-250, annual, "Machinery Industries (except electrical machinery)".

VI. CANADIAN EXPORTS

<u>Description and Commodity Code</u>	1990		<u>Major Country of Destination</u>
	<u>Quantity</u> (No.)	<u>Value</u> (\$000)	<u>% of Total Value</u> 1990
Cranes designed for mounting on road vehicles H.S. 8426.91	102	2 597	U.S. 90

CRANES MOUNTED ON ROAD VEHICLES

(H.S. 8426.91)

VII. CANADIAN IMPORTERS - 1989

There were 95 known importers of cranes mounted on road vehicles in 1989. The principal 25 importers accounted for 84 per cent of the total import value.

<u>Principal Importers</u> (No.)	<u>Cumulative Value</u> (\$000)	<u>Cumulative % of Total Value</u>
5	15 172	49
10	20 151	65
15	23 141	75
25	25 963	84
All Importers (95)	30 788	100

The principal 25 importers of cranes mounted on road vehicles during 1989 are listed below in alphabetical order. Where the importer is not the same as the consignee (i.e. the recipient of the goods shipped), the name of the consignee rather than that of the importer is listed. The importer or consignee is not necessarily the end-user of the product.

NOTE: This list includes all importers except individuals.

Name

Allan Fyfe Equipment Limited
Arctic Gear Components Ltd.
Atlas Polar Co. Ltd.
Atlasquip Ltée.
B&A Equipment Ltd.
C W Smith Crane Rental Ltd.
Canadian Shuttle Wagon Ltd.
Commercial Body Builders Ltd.
Contractors Machinery & Equipment Ltd.
Cranes Unlimited Ltd.
Creston Truck Service Ltd.
Danco Equipment Ltd.
Équipement Piedmont Ltée.
Équipements Lefco Inc., Les
High Reach Inc.
I M T Cranes Canada Ltd.
James International Truck & Tractor Ltd.
King Equipment Mfg. Corp.
Paikin Equipment Inc.
Pitman Manufacturing Company Inc.
Ruggieri Bros Automotive Ltd.
Timberjack Inc.
Wajax Industries Limited
West Coast Machinery Ltd.
Wilson Equipment Limited

Address

Concord, Ont.
Edmonton, Alta.
Toronto, Ont.
St-Laurent, Qué.
Ajax, Ont.
Scarborough, Ont.
Surrey, B.C.
Vancouver, B.C.
Burlington, Ont.
Pickering, Ont.
Creston, B.C.
Calgary, Alta.
Boucherville, Qué.
Montréal, Qué.
Oakville, Ont.
Orillia, Ont.
Kamloops, B.C.
Woodstock, Ont.
Burlington, Ont.
Markham, Ont.
Concord, Ont.
Woodstock, Ont.
Mississauga, Ont.
Langley, B.C.
Truro, N.S.

CRANES MOUNTED ON ROAD VEHICLES

(H.S. 8426.91)

VIII. FOREIGN EXPORTERS TO CANADA - 1989

Major exporters to Canada of cranes mounted on road vehicles 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.

<u>Country of Origin</u>	<u>Name of Foreign Exporter</u>	<u>Value of Exports to Canada 1989 (\$000)</u>
Sweden	Hiab Foco AB)	
United States	Manitex Inc.)	6 777*
Fed. Rep. of Germany	Atlas Weyhausen GmbH)	
United States	Simon RO Corp.)	4 899*
Italy	Fassi Gru Idrrauliche SPA)	
United States	Omark Industries Inc.)	4 575*
Spain	Hiab Foco AB)	
United States	General Cable Co.)	2 700*
United States	Asplundh PDC	776
United States	Time Mfg. Co.	756
United States	Iowa Mold Tooling Co.)	
United States	JLG Industries Inc.)	1 629*
Sweden	Tico AB)	
Italy	Effer SPA)	
Italy	Cormach SLR)	
United States	Allied Systems Co.)	999*
Italy	Ing Bonfiglioli SPA)	
TOTAL		23 111

* Aggregated to preserve confidentiality of Canadian importers.

CRANES MOUNTED ON ROAD VEHICLES (H.S. 8426.91))

IX. CANADIAN SUPPLIERS

The following lists are taken from two sources: a) the Business Opportunities Sourcing System (BOSS), a computerized data bank established by the Federal Department of Industry, Science and Technology Canada; and, b) the Canadian Trade Index, published by the Canadian Manufacturers' Association (CMA). These lists may not include all suppliers of the products in question, as companies must themselves register in BOSS or the Canadian Trade Index. In both cases, information on Canadian products supplied is as given by the companies.

BOSS

Companies are arranged in alphabetical order.

Cranes, Hydraulic Extension Boom, Non-Integrated Truck Mount and Hydraulic Articulated Boom Type

<u>Name</u>	<u>Address</u>
Arva Crane Ltd.	London, Ont.
CME Ind. Div. of Contractors Mach & Equip.	Burlington, Ont.
*IMT Cranes Canada Ltd.	Orillia, Ont.
*Promac Industries Ltd.	Duncan, B.C.
Provincial Crane Inc.	Niagara Falls, Ont.
Shur-Lift Industries Limited	Winnipeg, Man.
W.E. Wilkinson Ltd.	Hamilton, Ont.

* Company engaged in export trade

Any enquiries and/or comments regarding the BOSS list should be directed to:

Business Opportunities Sourcing System
Industry, Science and Technology Canada
235 Queen Street
Ottawa, Ontario K1A 0H5
Tel.: (613) 954-5031
Telex: 053-4123
Fax.: (613) 954-1894

CRANES MOUNTED ON ROAD VEHICLES (H.S. 8426.91)

IX. CANADIAN SUPPLIERS (Cont'd)

CANADIAN TRADE INDEX

Companies are arranged in alphabetical order.

Cranes and Shovels, Power, Crawler, Truck or Carrier Mounted

<u>Name</u>	<u>Address</u>
Alo Canada Inc. Handling Specialty Manufacturing Limited	Fort Erie, Ont. Grimsby, Ont.
*IMT Cranes Canada Ltd. King Equipment Manufacturing Corp. Marmac Limited	Orillia, Ont. Woodstock, Ont. Scarborough, Ont.
*Promac Industries Ltd. Versa-Hoe Equipment Corp. Wilkinson, W.E., Limited	Duncan, B.C. Burlington, Ont. Hamilton, Ont.

* Company engaged in export trade

Any enquiries and/or comments regarding the Canadian Trade Index list should be directed to:

The Canadian Manufacturers' Association
One Yonge Street
Toronto, Ontario M5E 1J9
Tel.: (416) 363-7261
Telex: 065-24693
Fax.: (416) 363-3779

CRANES MOUNTED ON ROAD VEHICLES (H.S. 8426.91)

X. CANADIAN AND FOREIGN TARIFFS

Cranes 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>
	Derricks; cranes, including cable cranes; mobile lifting frames, straddle carriers and works trucks fitted with a crane			
	-Other machinery:			
8426.91.00	--Designed for mounting on road vehicles	9.2%	2.5%	3.6%

TARIFF ARRANGEMENTS AND FOREIGN COUNTRIES OF EXPORT

Exporting countries which qualify for the Most Favoured Nation tariff treatment: Sweden, Italy, The United Kingdom, Fed. Rep. of Germany, Spain, Austria, Finland, Australia and Denmark.

Enquiries concerning tariffs should be directed to the nearest Revenue Canada Customs and Excise office as listed on page two of this report.

FOREIGN COUNTRIES

Enquiries concerning tariffs and other government trade regulations in foreign countries should be directed to External Affairs as listed on page two of this report.

CRANES MOUNTED ON ROAD VEHICLES

(H.S. 8426.91)

XI. UNITED STATES' IMPORTS - 1989

The United States Department of Commerce reports U.S. imports of "derricks, other, designed for road vehicles" as follows:

<u>Country of Origin</u>	<u>Quantity (No.)</u>	<u>Value⁽¹⁾ (\$000)</u>	<u>Import Market Share (% based on value)</u>	<u>Average Unit Price (\$000)</u>
Canada	115	3 305	54.0	29
Italy	78	1 653	27.0	21
United Kingdom	10	279	4.6	28
Sweden	21	275	4.5	13
Fed. Rep. of Germany	18	257	4.2	14
Japan	25	215	3.5	9
France	1	80	1.3	80
Denmark	<u>4</u>	<u>58</u>	<u>0.9</u>	<u>15</u>
TOTAL	272	6 122	100.0	23

⁽¹⁾ A conversion factor of 1.1842 was used to convert the value of 1989 U.S. imports to Canadian dollars.

CRANES MOUNTED ON ROAD VEHICLES

(H.S. 8426.91)

XII. MARKET OVERVIEW

This overview deals specifically with **Cranes Mounted on Road Vehicles**, H.S. Code 842691. This equipment is categorized as hoisting equipment which is a sub-sector of the **Material Handling Equipment** sector.

The total value of shipments by Canadian producers in 1990 is not available at this time, however, it is estimated to be \$50 million based on the overall sector trends over the period 1986-1990. Total imports into Canada in 1990 were \$25 million, exports in the same period were \$2.6 million. This would indicate a possible Canadian Domestic Market of approximately \$70 million existed in 1990. Some market downturn has been experienced, particularly in the fourth quarter of 1990, as indicated by the reduction of imports when compared with the 1989 levels. No growth in imports was apparent since 1988. This downturn will probably last through 1991 as recovery is not expected till later in this year.

Some 61 per cent of the imports in 1990 originated from the United States. This would suggest that the most immediate major market potential would be available in the area of import replacement, particularly of those imports from the United States.

The low level of imports by the United States, \$6.1 million in 1989, of which 54 per cent was supplied by Canada, would indicate that the majority of the US requirements are being satisfied by their domestic manufacturers. Canadian exports in 1990 dropped when compared to the prior two years. Strong competition may be expected in any effort to develop further market penetration in this area in the short term.

It is important to recognize, as noted previously, that the above values relate to the specific H.S. Code 842691, and includes all **Cranes Mounted on Road Vehicles**. This category incorporates an extensive range of types including aerial buckets, electric and hydraulic straight boom, log loaders and automotive towing wreckers in addition to articulated boom cranes.

There are few Canadian companies who are listed in Business Opportunities Sourcing System (BOSS) as specifically manufacturing **Hydraulic Articulated Boom Type Cranes**. These companies are predominantly Canadian owned. The companies listed indicate a total manufacturing capacity of \$25-65 million annually. Clearly not all this capacity would be directed toward articulated boom cranes. Some reduction in manufacturing capacity has taken place as companies have made adjustments as a result of the noted market downturn.

A strategic alliance with a major US manufacturer may be a consideration particularly if an early improvement in market share is an objective in the short-term.

Commerce Officer: Tony Jarvis
Surface Transportation and Machinery Branch
Manufacturing Equipment Division
Tel.: (613) 954-7812

FOR MORE INFORMATION PLEASE CONTACT:

Market Intelligence Division
Services to Business Branch
Industry, Science and Technology Canada
235 Queen Street
Ottawa, Ontario
K1A 0H5
Tel.: (613) 954-4970
Fax.: (613) 954-5463

OR
Manufacturing Equipment Division
Surface Transportation and Machinery
Branch
Industry, Science and Technology Canada
235 Queen Street
Ottawa, Ontario
K1A 0H5
Tel.: (613) 954-7812
Fax.: (613) 954-1894

ISTC BUSINESS SERVICE CENTRES

These centres have been established at headquarters and in every regional office to provide clients with a gateway into the complete range of ISTC services, information products, programs and expertise.

REGIONAL OFFICES

QUÉBEC

ISTC
Tour de la Bourse, Suite 3800
800 Victoria Place
P.O. Box 247
Montréal, Qué. H4Z 1E8
Tel.: (514) 283-8185
or 1-800-361-5367
Fax.: (514) 283-3302

NEWFOUNDLAND

ISTC
Atlantic Place
215 Water Street, 5th Floor
P.O. Box 8950
St. John's, Nfld. A1B 3R9
Tel.: (709) 772-ISTC
Fax.: (709) 772-5093

PRINCE EDWARD ISLAND

ISTC
Confederation Court Mall
134 Kent Street, Suite 400
P.O. Box 1115
Charlottetown, P.E.I. C1A 7M8
Tel.: (902) 566-7400
Fax.: (902) 566-7450

ONTARIO

ISTC
Dominion Public Building
1 Front Street West, 4th Floor
Toronto, Ont. M5J 1A4
Tel.: (416) 973-ISTC
Fax.: (416) 973-8714

NOVA SCOTIA

ISTC
Central Guaranty Trust Tower
1801 Hollis Street, 5th Floor
P.O. Box 940, Station 'M'
Halifax, N.S. B3J 2V9
Tel.: (902) 426-7259
Fax.: (902) 426-2624

NEW BRUNSWICK

ISTC
Assumption Place, 12th Floor
770 Main Street
P.O. Box 1210
Moncton, N.B. E1C 8P9
Tel.: (506) 857-ISTC
Fax.: (506) 851-6429

MANITOBA

ISTC
8th Floor
330 Portage Avenue
P.O. Box 981
Winnipeg, Man.
R3C 2V2
Tel.: (204) 983-ISTC
Fax.: (204) 983-2187

SASKATCHEWAN

ISTC
401-119 4th Avenue South
Saskatoon, Sask.
S7K 5X2
Tel.: (306) 975-4386
Fax.: (306) 975-5334

BRITISH COLUMBIA

ISTC
Suite 900
Scotia Tower,
650 West Georgia St.
P.O. Box 11610
Vancouver, B.C.
V6B 5H8
Tel.: (604) 666-0266
Fax.: (604) 666-0277

REGIONAL OFFICES (Cont'd)

ALBERTA

ISTC
Room 540
Canada Place
9700 Jasper Avenue
Edmonton, Alta. T5J 4C3
Tel.: (403) 495-ISTC
Fax.: (403) 495-4507

ISTC
Suite 1100
510-5th Street Southwest
Calgary, Alta. T2P 3S2
Tel.: (403) 292-4575
Fax.: (403) 292-4578

YUKON

ISTC
Suite 301
108 Lambert Street
Whitehorse, Y.T. Y1A 1Z2
Tel.: (403) 668-4655
Fax.: (403) 668-5003

NORTHWEST TERRITORIES

ISTC
10th Floor
Precambrian Building
P.O. Bag 6100
Yellowknife, N.W.T.
Tel.: (403) 920-8568
Fax.: (403) 873-6228

HEADQUARTERS

ISTC
1st Floor, East Tower
235 Queen Street
Ottawa, Ont. K1A 0H5
Tel.: (613) 952-ISTC
Fax.: (613) 957-7942

