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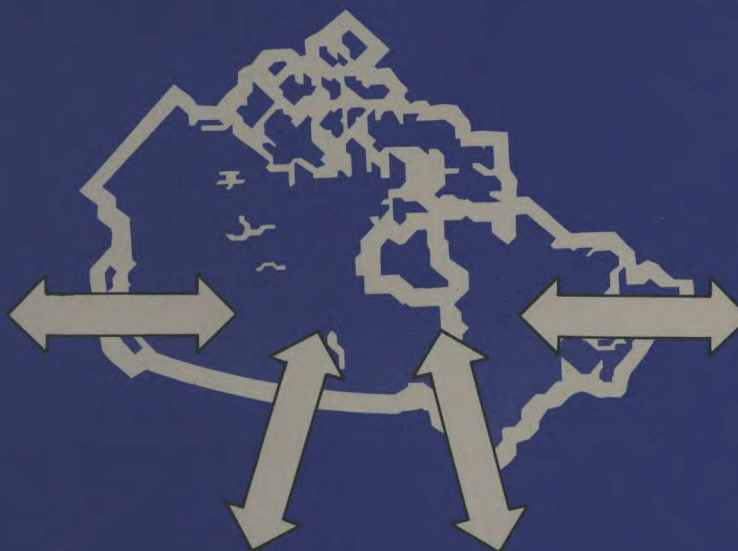
Industrie, Sciences et
Technologie Canada

MARKET INTELLIGENCE

GOLF CLUBS

Pub. No.: 91015-IP

July 1991



Canada



GOLF CLUBS

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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
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

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.

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GOLF CLUBS

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.

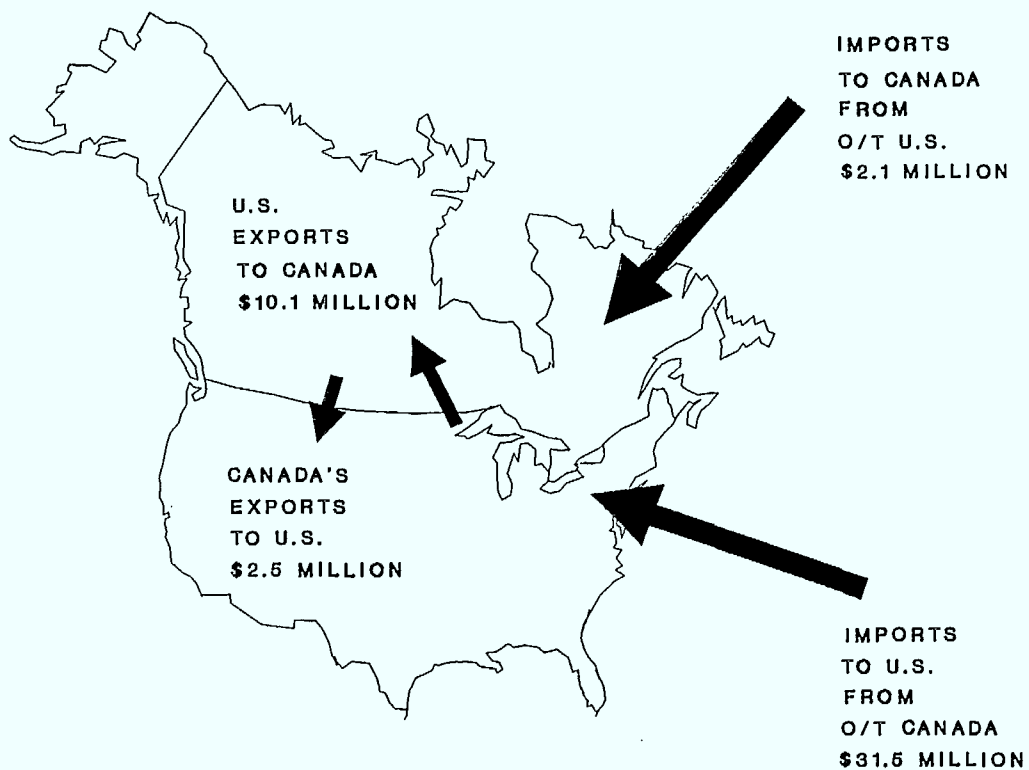
This report is based on data from several sources. The following is a list of Harmonized System (H.S.) import commodity codes dealing with golf equipment. This report deals only with golf clubs (H.S. 9506.31). Other related reports are also listed.

<u>Description</u>	<u>H.S. Commodity Codes Analyzed</u>	<u>Related Reports Pub. Nos.</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)		
-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)		N/A
---Hollow, for practice (9506.32.10.00)		N/A
---Other (9506.32.90.00)		N/A
--Other (9506.39)		
---Shafts of steel or graphite (9506.39.10)		90055-IP
----Of seamless steel, not plated (9506.39.10.10)		90055-IP
----Other (9506.39.10.90)		90055-IP
---Shafts of wood; heads of woods (9506.39.20)		90055-IP
---Forged heads of iron or steel, not ground, polished, plated or otherwise finished (9506.39.30.00)		N/A
---Other (9506.39.90)		N/A
----Grips (9506.39.90.10)		N/A
----Other parts of golf clubs (9506.39.90.20)		N/A
----Other (9506.39.90.90)		N/A

Total imports of golf clubs and other golf equipment were valued at \$62.3 million in 1990. Imports of golf clubs as reported on H.S. Commodity Codes examined for the year 1990 amounted to \$12.2 million or 19.6 per cent of all imports.

GOLF CLUBS (H.S. 9506.31)

II. NORTH AMERICAN IMPORTS - 1990



North American Imports - \$33.6 Million*

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

GOLF CLUBS

III. SUMMARY OF CANADIAN IMPORTS

<u>Description and Commodity Code</u>	<u>1988</u>		<u>Total Imports</u>		<u>1990</u>		<u>Major Country of Export to Canada % of Total Value</u>		
	<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>
	(000)	(\$000)	(000)	(\$000)	(000)	(\$000)			
Individual golf clubs H.S. 9506.31.00.10	243	6 886	199	6 184	224	7 575	U.S.A. 86	U.S.A. 87	U.S.A. 79
Sets of golf clubs H.S. 9506.31.00.20	143	3 674	96	4 625	76	4 675	U.S.A. 83	U.S.A. 84	U.S.A. 89

1990 CANADIAN IMPORTS BY PROVINCE OF CUSTOMS CLEARANCE

INDIVIDUAL GOLF CLUBS (H.S. 9506.31.00.10)

SETS OF GOLF CLUBS (H.S. 9506.31.00.20)

<u>Province</u>	<u>Quantity</u>	<u>Value</u>	<u>Province</u>	<u>Quantity</u>	<u>Value</u>
	(No.)	(\$000)		(No. of sets)	(\$000)
Ontario	154 074	5 011	Ontario	59 673	3 486
Québec	24 744	1 030	British Columbia	3 667	447
British Columbia	31 135	923	Québec	7 843	295
Alberta	8 810	438	Alberta	3 143	222
Manitoba	4 727	158	Manitoba	2 106	214
Nova Scotia	196	9	Nova Scotia	18	5
New Brunswick	53	3	Saskatchewan	28	5
Saskatchewan	27	2	New Brunswick	4	1
TOTAL	223 766	7 575	TOTAL	76 482	4 675

GOLF CLUBS

IV. CANADIAN IMPORTS BY MAJOR COUNTRIES OF ORIGIN

INDIVIDUAL GOLF CLUBS (H.S. 9506.31.00.10)

Country of Origin ⁽¹⁾	1988				1989				1990			
	<u>Quantity</u> (No.)	<u>Value</u> (\$000)	<u>Import Market Share</u> (% based on value)	<u>Average Unit Price</u> (\$)	<u>Quantity</u> (No.)	<u>Value</u> (\$000)	<u>Import Market Share</u> (% based on value)	<u>Average Unit Price</u> (\$)	<u>Quantity</u> (No.)	<u>Value</u> (\$000)	<u>Import Market Share</u> (% based on value)	<u>Average Unit Price</u> (\$)
United States	188 803	5 952	86	32	144 332	5 373	87	37	174 940	5 976	79	34
Taiwan	32 429	430	6	13	41 631	577	9	14	32 828	1 116	15	34
Japan	6 220	288	4	46	6 022	158	3	26	7 184	348	5	48
France	-	-	-	-	-	-	-	-	2 021	75	1	37
China	-	-	-	-	-	-	-	-	4 800	33	*	7
United Kingdom	13 480	173	3	13	4 316	60	1	14	435	18	*	41
Hong Kong	1 716	28	*	16	3 094	16	*	5	1 552	9	*	6
Other	275	17	*	62	-	-	-	-	6	-	-	-
TOTAL	242 923	6 886	100	28	199 395	6 184	100	31	223 766	7 575	100	34

⁽¹⁾ Countries are in descending order based on value for 1990.

* Less than one per cent.

91015-IP

GOLF CLUBS

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

SETS OF GOLF CLUBS (H.S. 9506.31.00.20)

Country of Origin ⁽¹⁾	1988				1989				1990			
	<u>Quantity</u> (No. of sets)	<u>Value</u> (\$000)	<u>Import Market Share</u> (% based on value)	<u>Average Unit Price</u> (\$)	<u>Quantity</u> (No. of sets)	<u>Value</u> (\$000)	<u>Import Market Share</u> (% based on value)	<u>Average Unit Price</u> (\$)	<u>Quantity</u> (No. of sets)	<u>Value</u> (\$000)	<u>Import Market Share</u> (% based on value)	<u>Average Unit Price</u> (\$)
United States	115 732	3 033	83	26	77 154	3 889	84	50	68 850	4 142	89	60
Taiwan	23 186	455	12	20	15 437	562	12	36	5 295	407	9	77
Japan	4 249	179	5	42	1 585	93	2	59	1 932	103	2	53
United Kingdom	276	7	*	25	734	57	1	78	115	12	*	104
South Korea	-	-	-	-	615	22	*	36	265	9	*	34
Hong Kong	-	-	-	-	-	-	-	-	25	1	*	40
China	-	-	-	-	55	2	*	36	-	-	-	-
TOTAL	143 443	3 674	100	26	95 580	4 625	100	48	76 482	4 675	100	61

⁽¹⁾ Countries are in descending order based on value for 1990.

* Less than one per cent.

GOLF CLUBS

(H.S. 9506.31)

V. CANADIAN SHIPMENTS

Statistics Canada reports that shipments of golf clubs by Canadian manufacturers are as follows:

	<u>1985</u>			<u>1986*</u>		
	<u>Establishments</u>	<u>Quantity</u> (No.)	<u>Value</u> (\$000)	<u>Establishments</u>	<u>Quantity</u> (No.)	<u>Value</u> (\$000)
Golf clubs	12	882 576	17 623	10	1 030 988	25 338

* Latest year 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) 951-3523

Source: Catalogue #47-250, annual, "Other Manufacturing Industries".

GOLF CLUBS
(H.S. 9506.31)

VI. CANADIAN EXPORTS - 1990

Separate export data for individual golf clubs or sets of golf clubs are not available. These products are included in the Harmonized System (H.S.) six digit code (9506.31) entitled "Golf clubs complete". 1990 exports for these products are as follows:

<u>Country</u>	<u>Quantity</u> (No.)	<u>Value</u> (\$000)
United States	92 200	2 522
Singapore	1 750	68
Australia	1 358	51
Japan	799	50
United Kingdom	1 235	42
Spain	590	41
Belgium	492	26
Hong Kong	<u>135</u>	<u>10</u>
TOTAL	98 559	2 810

GOLF CLUBS

VII. CANADIAN IMPORTERS - 1990

INDIVIDUAL GOLF CLUBS (H.S. 9506.31.00.10)

There were 224 known importers of individual golf clubs in 1990. The principal six importers accounted for 72 per cent of the total import value.

<u>Principal Importers</u> (No.)	<u>Cumulative Value</u> (\$000)	<u>Cumulative % of Total Value</u>
3	4 393	58
6	5 445	72
10	6 098	81
20	6 742	89
25	6 914	91
All Importers (224)	7 575	100

The principal 25 importers of individual golf clubs during 1990 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 principal importers except individuals.

<u>Name</u>	<u>Address</u>	<u>Name</u>	<u>Address</u>
A E Golf Mfg. Co. Ltd.	Fabreville Laval, Qué.	Ram Golf Canada	Mississauga, Ont.
Chas W A Stager & Assoc. Inc.	Cambridge, Ont.	Rampion Enterprises Ltd.	Richmond, B.C.
Club Works Inc.	London, Ont.	Roblin Associates Ltd.	Winnipeg, Man.
Fletcher Leisure Group Inc.	Dollard des Ormeaux, Qué.	Spalding & Evenflo (Canada) Ltd.	Downsview, Ont.
Frikon Industries Ltd.	Mississauga, Ont.	Sportlines International Limited	Toronto, Ont.
Hillierich & Bradsby of Canada Limited	Wallaceburg, Ont.	Sportstar Sales Ltd.	Vancouver, B.C.
Jim Morrison Ltd.	Gormley, Ont.	Taylor Made Golf Canada Inc.	Mississauga, Ont.
K Mart Canada Limited	Brampton, Ont.	Tournament Sports Marketing	Breslau, Ont.
Lynx Golf (Canada) Ltd.	Scarborough, Ont.	Volk Sports (Canada) Ltd.	Calgary, Alta.
March Sales Agency	Markham, Ont.	W. Six Investments Ltd.	Richmond, B.C.
Mitsubishi (Canada) Inc.	Richmond, B.C.	Wilson Sports Equipment Canada Limited	Belleville, Ont.
National Golf Distributors Inc.	Victoria, B.C.	Yonex Canada Ltd.	Calgary, Alta.
Nevada Bobs Golf & Tennis Ltd.	Mississauga, Ont.		
	Richmond, B.C.		

GOLF CLUBS

VII. CANADIAN IMPORTERS - 1990 (Cont'd)

SETS OF GOLF CLUBS (H.S. 9506.31.00.20)

There were 128 known importers of sets of golf clubs in 1990. The principal six importers accounted for 71 per cent of the total import value.

<u>Principal Importers</u> (No.)	<u>Cumulative Value</u> (\$000)	<u>Cumulative % of Total Value</u>
3	2 895	62
6	3 337	71
10	3 741	80
20	4 226	90
25	4 340	93
All Importers (128)	4 675	100

The principal 25 importers of sets of golf clubs during 1990 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 principal importers except individuals.

<u>Name</u>	<u>Address</u>	<u>Name</u>	<u>Address</u>
788234 Ontario Ltd.	Oakville, Ont.	Ram Golf Canada	Mississauga, Ont.
Bramco Meat Sales Inc.	Brampton, Ont.	Rampion Enterprises Ltd.	Richmond, B.C.
Chas W A Stager & Assoc. Inc.	Cambridge, Ont.	Roblin Associates Ltd.	Winnipeg, Man.
Hillerich & Bradsby of Canada Limited	Wallaceburg, Ont.	Spalding and Evenflo (Canada) Ltd.	Downsview, Ont.
Jim Morrison Ltd.	Gormley, Ont.	Sportlines International Limited	Toronto, Ont.
March Sales Agency	Markham, Ont.	Sportstar Sales Ltd.	Vancouver, B.C.
Mitsubishi (Canada) Inc.	Richmond, B.C.	Tecumseh Golf Centre	Tecumseh, Ont.
Nevada Bobs Golf & Tennis Ltd.	Mississauga, Ont.	Tournament Sports Marketing	Breslau, Ont.
Pro Golf Distributors Inc.	Toronto, Ont.	Volkl Sports (Canada) Ltd.	Calgary, Alta.
Pro Golf London Inc.	London, Ont.	W. Six Investments Ltd.	Richmond, B.C.
Pro Golf of Whitby Inc.	Whitby, Ont.	Wilson Sports Equipment	
Pro Golf Scarborough Inc.	Scarborough, Ont.	Canada Limited	Belleville, Ont.
Quality Brokerage Ltd.	Edmonton, Alta.	Yonex Canada Ltd.	Calgary, Alta.

GOLF CLUBS

VIII. FOREIGN EXPORTERS TO CANADA - 1990

INDIVIDUAL GOLF CLUBS (H.S. 9506.31.00.10)

Major exporters to Canada of individual golf clubs are listed by major country of origin in descending order of dollar value. These exporters accounted for 87 per cent of the total value of Canadian imports during 1990.

<u>Country of Origin</u>	<u>Name of Foreign Exporter</u>		<u>Value of Exports to Canada</u>
			<u>1990</u> (\$000)
United States	Taylor Made Golf	)	3 380*
	Karsten Manufacturing Corp.)	
	Mizuno Golf Co.	)	682*
	Allied Golf Corp.)	
	Titleist Golf Div.	)	337*
	Prima Golf)	
	Ram Golf Corp.	)	258*
	Square Two Golf)	
	Yamaha Exporting Inc.	)	185*
	Tru Form Inc.)	
	Slotline Golf Inc.	)	123*
	Palm Springs Golf Co.)	
	Spalding Co.	)	91*
	Lynx Golf Inc.)	
	Volk Ski & Tennis	)	118*
	Truex Golf)	
	Bullet Golf Ball Inc.)	
	King Par Golf & Hockey		34
	Wilson Sporting Goods	)	64*
	Roger Cleveland Golf Co.)	

* Aggregated to preserve confidentiality of Canadian importers.

GOLF CLUBS

VIII. FOREIGN EXPORTERS TO CANADA - 1990 (Cont'd)

INDIVIDUAL GOLF CLUBS (H.S. 9506.31.00.10)

<u>Country of Origin</u>	<u>Name of Foreign Exporter</u>	<u>Value of Exports</u> <u>to Canada</u>
		<u>1990</u> (\$000)
United States (Contd)	Bridge Stone Sports Inc.	45*
	House of Golf	
	Odm Pty Ltd.	61*
	Pro Group	
	Dynacraft Golf Prod	
	Prgr Usa	56*
	Tommy Armour Golf Co.	
	Auld Golf Inc.	
	Henry Griffitts Inc.	18
	Edwin Watts Golf Corp.	16
	Ray Cook Co.	42*
	Tommy Armour	
	Lion Golf of Oregon Inc.	
	Celebrity Inc.	12
	Las Vegas Discount Golf & Tee	12
	Mitsushiba International	35*
	Panzer Inc.	
	Htc International	
	Kiser Corp.	11
	Nevada Bobs	33*
	Otey Crisman Golf Co.	
	Ray Cook Company	

* Aggregated to preserve confidentiality of Canadian importers.

GOLF CLUBS

VIII. FOREIGN EXPORTERS TO CANADA - 1990 (Cont'd)

INDIVIDUAL GOLF CLUBS (H.S. 9506.31.00.10)

<u>Country of Origin</u>	<u>Name of Foreign Exporter</u>		Value of Exports to Canada
			<u>1990</u> (\$000)
Taiwan	Eastern Precision Casting Co.)	
	Strong Golf Ind. Co. Ltd.	)	849*
	Maibor Corp.)	
	Golden Pro Enterprises Co. Ltd.)	
	Shuenn Dah	)	129*
	Catex Ent Inc.)	
TOTAL			6 571

* Aggregated to preserve confidentiality of Canadian importers.

GOLF CLUBS

(H.S. 9506.31)

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.

Golf clubs

<u>Name</u>	<u>Address</u>
Action Golf Inc.	Laval, Qué.
*Bâtons De Golf Elan Enr. (Les)	St-Hyacinthe, Qué.
*Boutique Denis Berard Golf Shop	St-Hyacinthe, Qué.
Cosmopolitan Industries Ltd.	Saskatoon, Sask.
*Hillerich & Bradsby Of Canada Ltd.	Wallaceburg, Ont.
Kramer Of Kitchener Ltd.	Kitchener, Ont.
Spalding Canada	Concord, Ont.
*The Queensway Machine Products Ltd.	Etobicoke, Ont.
Torkos Brothers Inc.	Toronto, 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

GOLF CLUBS

(H.S. 9506.31)

IX. CANADIAN SUPPLIERS (Cont'd)

CANADIAN TRADE INDEX

Companies are arranged in alphabetical order.

Golf clubs

<u>Name</u>	<u>Address</u>
*Accuform Golf Ltd.	Toronto, Ont.
Action Golf Inc.	Ste-Rose, Qué.
Fletcher Leisure Group Inc.	Dollard des Ormeaux, Qué.
*Hillerich & Bradsby of Canada Limited	Wallaceburg, Ont.
Kramer of Kitchener Ltd.	Kitchener, Ont.
Pioneer Golf-Tech Inc.	Richmond, B.C.
Queensway Machine Products Ltd., (The)	Toronto, Ont.
Spalding Canada	Downsview, Ont.
Sportlines International Limited	Toronto, Ont.
Torkos Brothers Inc.	Toronto, Ont.
*Tournament Manufacturing Co. Ltd.	Waterloo, Ont.
Welflite Industries Ltd.	Montréal, Qué.
Wilson Sports Equipment Canada Inc.	Markham, 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

GOLF CLUBS

X. CANADIAN AND FOREIGN TARIFFS

Golf clubs 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>
	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)			
9506.31.00	--Clubs, complete	12.1%	8%	9.6%
	On and after January 1, 1991			8.4%

TARIFF ARRANGEMENTS AND FOREIGN COUNTRIES OF EXPORT

Exporting countries which qualify for the Most Favoured Nation tariff treatment: Taiwan, Japan, United Kingdom and France.

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

* 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 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.

GOLF CLUBS

(H.S. 9506.31)

XI. UNITED STATES' IMPORTS - 1989-1990

The United States Department of Commerce reports U.S. imports as follows:

U.S. IMPORTS BY COUNTRY OF ORIGIN

<u>Country of Origin</u>	<u>1989 Value⁽¹⁾ (\$000)</u>	<u>1990 Value⁽¹⁾ (\$000)</u>	<u>Per Cent Change 1989-90 %</u>
Japan	14 974	23 841	59.2
Taiwan	7 652	5 558	-27.4
Canada	2 057	2 506	21.8
Federal Republic of Germany	62	677	998.3
United Kingdom	631	506	-19.8
Thailand	100	496	397.5
Republic of Korea	309	334	8.2
South Africa	7	28	314.5
Hong Kong	24	23	-1.4
France	12	20	63.0
Other	<u>116</u>	<u>45</u>	<u>-61.3</u>
TOTAL	25 943	34 034	31.2

Ranked in descending order by 1990 value.
Canada ranked third overall.

⁽¹⁾ A conversion factor of 1.1842 and 1.1668 were used to convert the values of 1989 and 1990 U.S. imports, respectively, to Canadian dollars.

GOLF CLUBS

(H.S. 9506.31)

XII. MARKET OVERVIEW

The size of the Canadian golf club market in 1990 is estimated at almost \$50 million at the wholesale cost level (excl. taxes and duties). Exports represent about 6 per cent of industry shipments while the import share of complete clubs is approximately 25 per cent of the total market.

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 is supplied by the American parents of major Canadian assemblers.

There is only a very small handful of companies seriously engaged in exporting. At the export level, the American market absorbs about 90 per cent of total golf club exports of \$2.8 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 the USA.

The use of composites and various steel alloys in the manufacture of golf clubs continues to increase. The introduction of metal woods complemented by the extensive use of composite materials created a significant upswing in the market, especially among the active golfers. Now that this upgrading is almost completed, it appears that the much slower replacement market is gaining ascendancy and a more gradual growth rate can be expected in the next few years.

Various recent retail and consumer surveys continue to reinforce the perception of the exceptional popularity of golfing. Public participation continues to increase and it is estimated that over 2.5 million Canadians play golf. 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 fueled by an influx of younger golfers. In the USA, studies have shown 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.

GOLF CLUBS

(H.S. 9506.31)

XII. MARKET OVERVIEW (Cont'd)

Although 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, potential industry entrants and those contemplating expansion should keep in mind two other determinants: core golfers represent less than 50 per cent of the total golf participation market and this core segment is growing at no more than 2-4 per cent per year; and, the introduction of metal woods which, in large part created the rapid growth of the equipment market, is nearing completion.

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