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MARKET INTELLIGENCE

**AUTOMATIC FILM
DEVELOPING AND EXPOSING
EQUIPMENT**

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Canada



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**AUTOMATIC FILM
DEVELOPING AND EXPOSING
EQUIPMENT**

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REFERENCE SOURCES

Industry, Science and Technology Canada
Statistics Canada, Tel.: (613) 951-9647
Revenue Canada, Tel.: (613) 954-7007
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) 954-7007
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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AUTOMATIC FILM DEVELOPING AND EXPOSING EQUIPMENT

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.

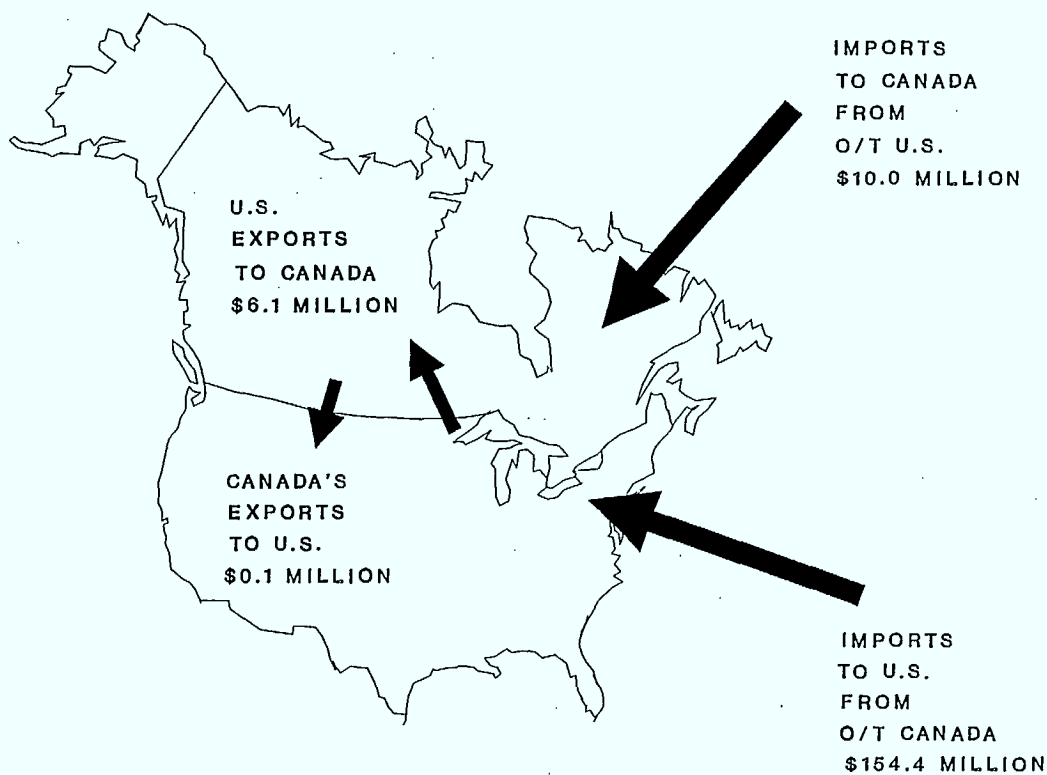
This report is based on data from several sources for the following Harmonized System (H.S.) commodity code:

<u>Description</u>	<u>H.S. Commodity Code Analyzed</u>
Apparatus and equipment for automatically developing photographic (including cinematographic) film or paper in rolls or for automatically exposing developed film to rolls of photographic paper	9010.10.00.00

AUTOMATIC FILM DEVELOPING AND EXPOSING EQUIPMENT

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II. NORTH AMERICAN IMPORTS - 1991



North American Imports - \$164.4 Million*

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

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III. CANADIAN IMPORTS

SUMMARY

1988	Total Imports			1988	Major Country of		
	1989	1990	1991		Export to Canada		
<u>Value</u>	<u>Value</u>	<u>Value</u>	<u>Value</u>	<u>1989</u>	<u>1990</u>	<u>1991</u>	
(\$000)	(\$000)	(\$000)	(\$000)				
14 550	16 529	15 325	16 132	U.S.A. 49	U.S.A. 47	U.S.A. 51	U.S.A. 38

**AUTOMATIC FILM DEVELOPING
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III. CANADIAN IMPORTS (Cont'd)

BY PROVINCE OF CLEARANCE

Province of Clearance -----	1988 ----	1989 ----	1990 ----	1991 ----	Average Annual Growth Rate 1988-91 ----- (%)
Ontario					
Value (\$000)	7 693	8 179	9 059	11 085	12.9
British Columbia					
Value (\$000)	3 624	4 228	1 523	2 986	-6.3
Québec					
Value (\$000)	2 131	3 189	2 868	958	-23.4
Manitoba					
Value (\$000)	374	381	228	579	15.7
Alberta					
Value (\$000)	519	430	1 491	442	-5.2
Saskatchewan					
Value (\$000)	95	43	92	66	-11.5
Nova Scotia					
Value (\$000)	11	15	9	8	-8.6
Newfoundland					
Value (\$000)	-	38	4	8	-54.8
New Brunswick					
Value (\$000)	102	21	52	-	-28.5
Prince Edward Island					
Value (\$000)	-	5	-	-	0.0
	-----	-----	-----	-----	-----
Total					
Value (\$000)	14 550	16 529	15 325	16 132	3.5

Ranked in descending order by 1991 value.

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III. CANADIAN IMPORTS (Cont'd)

MARKET SHARES BY PROVINCE OF CLEARANCE

Province of Clearance -----	1988 ----- %	1989 ----- %	1990 ----- %	1991 ----- %
Ontario Value	52.9	49.5	59.1	68.7
British Columbia Value	24.9	25.6	9.9	18.5
Québec Value	14.6	19.3	18.7	5.9
Manitoba Value	2.6	2.3	1.5	3.6
Alberta Value	3.6	2.6	9.7	2.7
Saskatchewan Value	0.7	0.3	0.6	0.4
Nova Scotia Value	0.1	0.1	0.1	0.1
Newfoundland Value	-	0.2	0.0	0.0
New Brunswick Value	0.7	0.1	0.3	-
Prince Edward Island Value	-	0.0	-	-
	-----	-----	-----	-----
Total Value	100.0	100.0	100.0	100.0

Ranked in descending order by 1991 value.

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III. CANADIAN IMPORTS (Cont'd)

BY MAJOR COUNTRY OF ORIGIN

Country of Origin	1988	1989	1990	1991	Average Annual Growth Rate 1988-91 (%)
United States					
Value (\$000)	7 200	7 733	7 763	6 083	-5.5
Japan					
Value (\$000)	5 492	6 631	3 970	5 758	1.6
Fed. Rep. of Germany					
Value (\$000)	164	426	862	1 232	95.7
Italy					
Value (\$000)	372	139	523	1 071	42.2
France					
Value (\$000)	56	14	866	964	157.7
Denmark					
Value (\$000)	684	774	518	307	-23.4
Switzerland					
Value (\$000)	16	317	281	206	135.8
Hong Kong					
Value (\$000)	-	-	30	161	446.0
Israel					
Value (\$000)	11	-	-	114	121.2
Ireland					
Value (\$000)	202	45	126	95	-22.2
Other					
Value (\$000)	352	451	386	141	-26.3
Total					
Value (\$000)	14 550	16 529	15 325	16 132	3.5

Ranked in descending order by 1991 value.

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III. CANADIAN IMPORTS (Cont'd)

MARKET SHARES BY MAJOR COUNTRY OF ORIGIN

Country of Origin	1988	1989	1990	1991
-----	----	----	----	----
	%	%	%	%
United States				
Value	49.5	46.8	50.7	37.7
Japan				
Value	37.7	40.1	25.9	35.7
Fed. Rep. of Germany				
Value	1.1	2.6	5.6	7.6
Italy				
Value	2.6	0.8	3.4	6.6
France				
Value	0.4	0.1	5.6	6.0
Denmark				
Value	4.7	4.7	3.4	1.9
Switzerland				
Value	0.1	1.9	1.8	1.3
Hong Kong				
Value	-	-	0.2	1.0
Israel				
Value	0.1	-	-	0.7
Ireland				
Value	1.4	0.3	0.8	0.6
Other				
Value	2.4	2.7	2.5	0.9
	-----	-----	-----	-----
Total				
Value	100.0	100.0	100.0	100.0

Ranked in descending order by 1991 value.

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IV. CANADIAN EXPORTS BY MAJOR COUNTRY OF DESTINATION

1989		1990		1991	
<u>Country</u>	<u>Value</u> (\$000)	<u>Country</u>	<u>Value</u> (\$000)	<u>Country</u>	<u>Value</u> (\$000)
Denmark	603	Singapore	115	Hungary	1 137
U.S.	387	U.S.	88	Vietnam	405
France	245	Portugal	69	Australia	135
U.K.	56	Guatemala	62	U.S.	115
G.D.R.	37	W. Germany	54	W. Germany	16
Jordan	31	Hungary	48	Japan	10
Spain	14	U.K.	31	Spain	9
Israel	4	Australia	29	Hong Kong	6
Chile	3	Hong Kong	13		
Italy	2	Vietnam	10		
Others	<u>4</u>	Others	<u>0</u>	Others	<u>0</u>
TOTAL	1 386		519		1 834

Note: Major countries in descending order based upon value.
See note on page 20 concerning U.S. imports from Canada.
Source: Statistics Canada.

**AUTOMATIC FILM DEVELOPING
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V. CANADIAN IMPORTERS - 1990

There were 243 known importers of automatic film developing and exposing equipment in 1990. The principal 29 importers accounted for 80 per cent of the total import value.

<u>Principal Importers</u> (No.)	<u>Cumulative Value</u> (\$000)	<u>Cumulative % of Total Value</u>
3	5 577	36
6	7 480	49
10	8 742	57
15	10 049	66
25	11 824	77
29	12 315	80
All Importers (243)	15 325	100

The principal 29 importers of automatic film developing and exposing equipment 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 29 principal importers except individuals.

<u>Name</u>	<u>Address</u>	<u>Name</u>	<u>Address</u>
Agfa Canada Inc.	Concord, Ont.	Integrated Technology Ltd.	Markham, Ont.
Azon Canada Inc.	Montréal, Qué.	Kodak Canada Inc.	Toronto, Ont.
Bellevue Pathé Québec Inc.	Montréal, Qué.	L & R Graphic Supply Inc.	Mississauga, Ont.
Blair Behnsen (1984) Ltd.	Vancouver, B.C.	Lisle Kelco Ltd.	Mississauga, Ont.
Chas Abel Photo Service Ltd.	Toronto, Ont.	McCutcheon Graphics Inc.	Downsview, Ont.
Dainippon Screen (Canada) Inc.	Mississauga, Ont.	Olan Mills Kingston Inc.	Chattanooga, TN, U.S.A.*
Drytac Canada Inc.	Concord, Ont.		
Du Pont Canada Inc.	Mississauga, Ont.	Oriental Photo O/B 425133 Ontario Limited	Toronto, Ont.
Eskofot Canada Ltd.	Mississauga, Ont.	Polychrome Corporation Canada Ltd.	Yonkers, NY, U.S.A.*
Fuji Photo Film Canada Inc.	Mississauga, Ont.	Technical Inc.	Vancouver, B.C.
Graphtronics Ltd.	Weston, Ont.	Trans Canada Customs Inc.	Mississauga, Ont.
Gretag Systems a Business Unit of Ciba-Geigy Corporation	Seattle, WA, U.S.A.*	Treck Photographic of Canada Ltd.	Concord, Ont.
Groupe Christie Ltée., Le	St-Eustache, Qué.	United Pharmacists Enterprises Ltd.	Saskatoon, Sask.
Ilford Photo (Canada) Ltd.	Markham, Ont.		

* Non resident importer.

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VI. FOREIGN EXPORTERS TO CANADA - 1990

Major exporters to Canada of automatic film developing and exposing equipment are listed in descending order of dollar value. These exporters accounted for 70 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 1990 (\$000)</u>
Japan	Fuji Photo Film Co. Ltd.	2 740
United States	Eastman Kodak Co.	2 651*
France	Print Technology Inc.	
Fed. Rep. of Germany	Agfa	
United States	Kreonite Inc.	420
	Logetronics Corp.	369
	Agfa Corp.	699*
	Lucht Engineering Inc.	
	Optotech	625*
Hope Industries Inc.		
Switzerland	Standard	568*
	Gretag Systems	
Denmark	Eskofot Denmark	729*
United States	Print Technology	
	Olan Mills Inc.	
Italy	GPE ARL	560*
Japan	Orient Consolidation	
United States	DS America Inc.	
Italy	Iford Limited	512*
Japan	Agfa Copal Inc.	
United States	Polychrome Corp.	

* Aggregated to preserve confidentiality of Canadian importers.

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

<u>Country of Origin</u>	<u>Name of Foreign Exporter</u>	<u>Value of Exports to Canada 1990</u> (\$000)
United States (Contd)	Gretag Systems)	
	Aarque Systems)	484*
Denmark	Glunz and Jensen)	
Australia	RK Equipment)	
Japan	Dainippon)	340*
United States	Dunning Photo Equipment)	
TOTAL		10 697

* Aggregated to preserve confidentiality of Canadian importers.

AUTOMATIC FILM DEVELOPING AND EXPOSING EQUIPMENT

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VII. 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.

Photographic Processing and Finishing Equipment and Accessories

<u>Name</u>	<u>Address</u>
Adita Enterprises Inc.	Calgary, Alta.
*Glenister & Associates Ltd.	Kanata, Ont.
Identicam Systems Canada Ltd.	Downsview, Ont.
*Imapro Corporation	Ottawa, Ont.
J.L.M.B. Interpro Lab Inc.	St-Laurent, Qué.
Métaux Champetier Ltée., Les	St-Laurent, Qué.
Puckrin's Production House Ltd.	Edmonton, Alta.

* 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

**AUTOMATIC FILM DEVELOPING
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VII. CANADIAN SUPPLIERS (Cont'd)

CANADIAN TRADE INDEX

Companies are arranged in alphabetical order.

Photographic Processing Equipment

<u>Name</u>	<u>Address</u>
A.G.T. Photomount Company Kodak Canada Inc.	Downsview, Ont. Toronto, Ont.
*Mega System Design Limited	Scarborough, 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
4th Floor
75 International Boulevard
Etobicoke, Ontario M9W 6L9
Tel.: (416) 798-8000
Fax.: (416) 798-8050

AUTOMATIC FILM DEVELOPING AND EXPOSING EQUIPMENT

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VIII. CANADIAN AND FOREIGN TARIFFS

Automatic film developing and exposing equipment included in this report is dutiable under the following Canadian tariff item:

<u>Tariff Item</u>	<u>Description of Goods</u>	<u>Tariff Treatment - 1991</u>		
		<u>Most Favoured Nation Tariff</u>	<u>General Preferential Tariff</u>	<u>United States Tariff</u>
9010.10.00	Apparatus and equipment for automatically developing photographic (including cinematographic) film or paper in rolls or for automatically exposing developed film to rolls of photographic paper	FREE	FREE	FREE
	On and after January 1, 1992	FREE	FREE	FREE

TARIFF ARRANGEMENTS AND FOREIGN COUNTRIES OF EXPORT

Exporting countries which qualify for the Most Favoured Nation tariff treatment: Japan, France, Federal Republic of Germany, Italy, Denmark, Switzerland, Ireland.

Exporting countries which qualify for the Most Favoured Nation tariff treatment or General System of Preference tariff treatment:* Hong Kong, Israel.

* 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.

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VIII. CANADIAN AND FOREIGN TARIFFS (Cont'd)

Automatic film developing and exposing equipment included in this report is dutiable under the following U.S. tariff item:

<u>Tariff Item</u>	<u>Description of Goods</u>	<u>Rates of Duty - 1992</u>		
		<u>General</u>	<u>Special⁽¹⁾</u>	<u>2</u>
9010.10.00	Apparatus and equipment for automatically developing photographic (including cinematographic) film or paper in rolls or for automatically exposing developed film to rolls of photographic paper	3.7%	FREE (A,E,IL) 2.2% (CA)	35%

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.

⁽¹⁾ Generalized System of Preferences	A
United States-Canada Free-Trade Agreement	CA
Caribbean Basin Economic Recovery Act	E
United States-Israel Free Trade Area	IL

2 Rates of Duty Column 2. Notwithstanding any other provisions, the rates of duty shown in column 2 shall apply to products, whether imported directly or indirectly, of the following countries and areas pursuant to section 401 of the Tariff Classification Act of 1962, to section 231 or 257(e)(2) of the Trade Expansion Act of 1962, to section 404(a) of the Trade Act of 1974 or to any other applicable section of law, or to action taken by the President thereunder:

Afghanistan	German Democratic Republic	Mongolia
Albania	Kampuchea	North Korea
Bulgaria	Laos	Romania
Cuba	Latvia	Union of Soviet Socialist Republics
Czechoslovakia	Lithuania	Vietnam
Estonia		

**AUTOMATIC FILM DEVELOPING
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IX. UNITED STATES' IMPORTS

BY MAJOR COUNTRY OF ORIGIN

Country of Origin	1989	1990	1991	Average Annual Growth Rate 1989-91
-----	----	----	----	-----
				(%)
Japan				
Value (\$000)	69 398	75 284	78 041	6.0
Fed. Rep. of Germany				
Value (\$000)	16 828	31 728	37 061	48.4
Denmark				
Value (\$000)	16 743	15 834	13 795	-9.2
Switzerland				
Value (\$000)	2 051	5 656	8 686	105.8
Italy				
Value (\$000)	1 899	5 212	7 193	94.6
United Kingdom				
Value (\$000)	1 363	5 295	5 067	92.8
Ireland				
Value (\$000)	1 409	3 015	2 469	32.4
France				
Value (\$000)	1 731	4 813	1 819	2.5
Canada				
Value (\$000)	150	90	113	-13.2
Australia				
Value (\$000)	4	184	54	276.1
Other				
Value (\$000)	687	1 066	195	-46.8
Total	-----	-----	-----	-----
Value (\$000)	112 264	148 177	154 492	17.3

Ranked in descending order by 1991 value.
Canada ranked 9 overall.

NOTE: Prior to 1989, commodity coding was based on the Tariff Schedule of the United States (TSUSA) and therefore comparable data are not available. 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, is minimal resulting from exchange rates.

DID YOU KNOW?

Effective May 1, 1991, the Market Intelligence Division of the Services to Business Branch of Industry, Science and Technology Canada became the Office of Primary Interest (OPI) for **dISTCcovery**. This service, developed by the New Brunswick Regional Office, is being implemented on a national basis and is available in most regional offices.

WHAT IS dISTCcovery? **dISTCcovery** is a tool for discovering and acquiring new manufacturing opportunities emerging from a worldwide explosion in technological developments, new products and new processes.

dISTCcovery introduces you to companies and organizations from around the world who are willing to licence the right to manufacture and sell their product in an agreed market area. The reverse is also possible. A Canadian company can also use **dISTCcovery** to promote their unique product or process for licensing internationally.

dISTCcovery provides access to international data bases containing thousands of licensing offers for new products, processes and technology originating from around the world.

For more information on this service, contact the Market Intelligence Division at (613) 954-4970 or the nearest **ISTC** Regional Office listed at the end of this publication.



dISTCcovery

YOUR WINDOW TO A WORLD OF BUSINESS OPPORTUNITIES
UNE FENÊTRE SUR DES PERSPECTIVES COMMERCIALES

FOR MORE INFORMATION PLEASE CONTACT:

Market Intelligence and
Technology Opportunities Service
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
Advanced Manufacturing Technology Directorate
Industrial and Electrical Equipment and Technology
Branch
Industry, Science and Technology Canada
235 Queen Street
Ottawa, Ontario
K1A 0H5
Tel.: (613) 954-2703
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

ONTARIO

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

MANITOBA

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

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

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

SASKATCHEWAN

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

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

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

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 210
300 Main Street
Whitehorse, Y.T. Y1A 2B5
Tel.: (403) 667-3921
Fax.: (403) 668-5003

NORTHWEST TERRITORIES

ISTC
10th Floor
Precambrian Building
P.O. Bag 6100
Yellowknife, N.W.T. X1A 2R3
Tel.: (403) 920-8568
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