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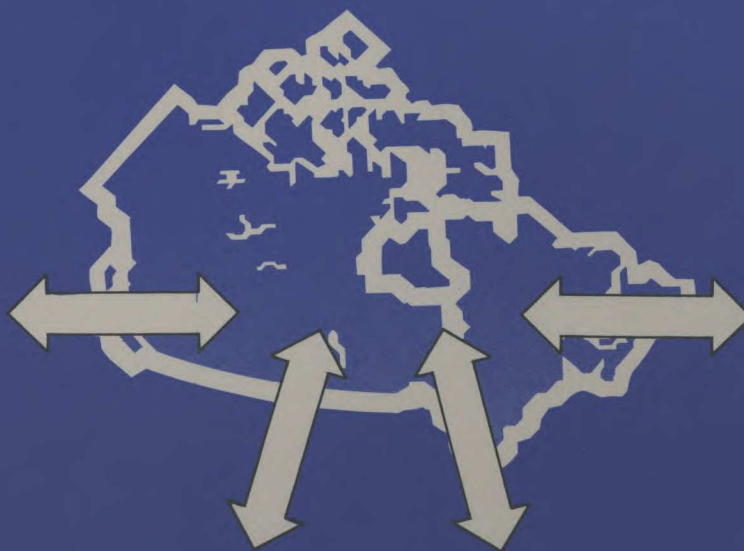
MARKET INTELLIGENCE

ICE HOCKEY GLOVES

MAY TO AUGUST 1991

Pub. No.: 92046-IA

September 1992



Canada



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Prepared by:

Greg Jahn

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) 954-2340

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

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

For Customs purposes, imports are recorded at values established according to the provisions of the Customs Act, which, since January 1, 1985, reflects valuation methods based on the General Agreement on Tariffs and Trade (GATT) Valuation Code System. It generally requires the value for duty of imported goods be equivalent to the transaction value or the price actually paid or payable provided that a number of conditions are met. One of the important conditions is that the buyer and seller must be independent of each other. If the conditions are not met, practical rules are used to determine the Customs value. Therefore, Canadian imports are valued Free on Board (F.O.B.), place of direct shipment to Canada. The Customs value excludes freight and insurance costs in bringing the goods to Canada from the point of direct shipment. Canadian exports to the U.S. are valued F.O.B. point of exit from Canada. Prior to 1990, they were valued F.O.B. place of lading net of freight charges, discounts and allowances.

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.

Canada - U.S. Reconciliation

Prior to 1989, United States commodity coding was based on the Tariff Schedule of the United States (TSUSA) and comparable data are not available. Starting in January 1989, the Harmonized Commodity Description and Coding System (H.S.) was adopted by the United States. However, Canada and the United States have been exchanging import data only since January 1990 and therefore there may be discrepancies in 1989 between Canadian exports to the United States and United States imports from Canada. As of January 1990, 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.

Abbreviations

BPT - British Preferential Treatment

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ICE HOCKEY GLOVES

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>
-Gloves, mittens and mitts:	
--Specially designed for use in sports (4203.21)	
-----Hockey	4203.21.90.30

The following table deals with total 1991 imports of hockey gloves which were valued at \$5.1 million. The table may contain hockey gloves used in field hockey; however, the period analyzed in this report only contains ice hockey gloves.

IMPORTS OF ICE HOCKEY GLOVES JANUARY TO DECEMBER 1991

<u>Month</u>	<u>Value (\$000)</u>
January	45
February	146
March	230
April	763
May	456
June	560
July	1 303
August	882
September	365
October	107
November	68
December	132
TOTAL	5 057

ICE HOCKEY GLOVES

II. ANALYSIS OF IMPORTS

MAY TO AUGUST 1991

This section is based on a detailed examination of Revenue Canada Customs import documents for the period May to August 1991.

Imports of ice hockey gloves during the months of May to August 1991 as reported on documents analyzed in this report, amounted to \$3.0 million. The value reported in this analysis does not correspond to the official Statistics Canada figure of \$3.2 million due to the unavailability of Revenue Canada customs documents at the time of analysis. The table below provides a reconciliation and imports by Country of Origin. Refer to page 7 Imports by Country of Origin and Price Range for further details.

Ice hockey gloves for goalies were valued at \$30 814 for a quantity of 561 sets. They are included with all ice hockey gloves. Detailed data on goalie gloves for individual countries cannot be shown due to the confidentiality provisions of the Statistics Act.

The major country of origin of these imports was Taiwan accounting for \$1.2 million (41 percent) of total imports. The Philippines accounted for \$0.8 million (27 percent), followed by the Republic of Korea with \$621 thousand and the remainder of imports of \$304 thousand originated from Finland, India, Indonesia, Thailand and the United States.

SUMMARY OF IMPORTS OF ICE HOCKEY GLOVES BY COUNTRY OF ORIGIN

MAY TO AUGUST 1991

<u>Country of Origin</u>	<u>Price Range</u>		<u>Quantity</u>	<u>Value</u>	<u>Average</u> <u>Unit Price</u>
	<u>Low</u>	<u>High</u>			
	<u>(\$/Pair)</u>		<u>(Pair)</u>	<u>(\$)</u>	<u>(\$/Pair)</u>
Taiwan	4.25 to	66.00	58 340	1 225 831	21.01
Philippines	7.74 to	32.00	64 739	813 319	12.56
Republic of Korea	4.47 to	54.45	25 215	620 571	24.61
Other Countries*	6.56 to	110.00	18 702	304 087	16.26
TOTAL - All Countries			166 996	2 963 808	17.75
Documents not available for processing		-	-	<u>237 227</u>	-
Total values accounted for as above		-	-	3 201 035	-
Total values published by Statistics Canada		-	-	3 201 035	-

* Other countries include: Finland, India, Indonesia, Thailand and the United States.

ICE HOCKEY GLOVES

II. ANALYSIS OF IMPORTS (Cont'd)

BY COUNTRY OF ORIGIN AND PRICE RANGE

MAY TO AUGUST 1991

<u>Country of Origin</u>	<u>Price Range</u> (\$/Pair)	<u>Quantity</u> (Pair)	<u>Value</u> (\$)	<u>Average</u> <u>Unit Price</u> (\$/Pair)
Taiwan	4.25 to 7.21	2 472	16 167	6.54
	7.84 to 8.58	9 010	75 215	8.35
	9.33 to 9.96	7 239	69 055	9.54
	10.08 to 10.92	2 373	24 835	10.47
	11.34 to 12.92	3 576	43 004	12.03
	13.17 to 14.48	2 436	33 388	13.71
	15.00 to 15.74	169	2 578	15.25
	16.77 to 17.00	671	11 303	16.85
	17.23 to 17.98	2 088	36 865	17.66
	18.00 to 18.86	1 950	35 958	18.44
	20.00 to 21.87	3 117	64 799	20.79
	22.33 to 25.84	2 180	52 500	24.08
	26.00 to 27.39	4 831	131 131	27.14
	28.43 to 29.77	1 392	40 960	29.43
	30.00 to 32.30	1 209	38 427	31.78
	33.12 to 33.93	1 488	50 135	33.69
	34.61 to 35.73	297	10 442	35.16
	36.11 to 36.98	298	10 860	36.44
	37.02 to 37.91	1 076	40 778	37.90
	38.07 to 38.95	5 395	206 915	38.35
	39.00 to 40.71	638	25 804	40.45
	41.00 to 41.60	349	14 388	41.23
	42.09 to 43.28	225	9 633	42.81
	44.00 to 44.66	1 391	61 954	44.54
	45.15 to 46.61	1 798	81 382	45.26
	47.17 to 66.00	672	37 355	55.59
TOTAL		58 340	1 225 831	21.01
Philippines	7.74 to 8.86	10 962	88 784	8.10
	9.26 to 10.35	5 920	60 140	10.16
	10.49 to 10.66	8 699	91 850	10.56
	10.71 to 11.94	5 119	58 273	11.38
	12.14 to 13.00	13 231	164 450	12.43
	13.74 to 14.63	7 462	105 100	14.08
	14.94 to 17.83	5 454	90 467	16.59
	17.84 to 18.57	1 549	28 307	18.27
	19.27 to 32.00	6 343	125 948	19.86
TOTAL		64 739	813 319	12.56

ICE HOCKEY GLOVES

II. ANALYSIS OF IMPORTS (Cont'd)

BY COUNTRY OF ORIGIN AND PRICE RANGE (Cont'd)

MAY TO AUGUST 1991

<u>Country of Origin</u>	<u>Price Range</u> (\$/Pair)	<u>Quantity</u> (Pair)	<u>Value</u> (\$)	<u>Average Unit Price</u> (\$/Pair)
Republic of Korea	4.47 to 54.45	25 215	620 571	24.61
Other countries*	6.56 to 110.00	<u>18 702</u>	<u>304 087</u>	<u>16.26</u>
TOTAL - All Gloves		166 996	2 963 808	17.75

* Other countries include: Finland, India, Indonesia, Thailand, and the United States. Detailed data for individual countries cannot be shown due to the confidentiality provisions of the Statistics Act.

ICE HOCKEY GLOVES

II. ANALYSIS OF IMPORTS (Cont'd)

CANADIAN IMPORTERS

MAY TO AUGUST 1991
(H.S. 4203.21.90.30)

Importers of ice hockey gloves during the period May to August 1991, as indicated in this report, 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.

IMPORT MARKET CONCENTRATION

<u>Principal Consignee/Importers</u> (By Value)	<u>Cumulative Quantity</u> (Pair)	<u>Cumulative Value</u> (\$000)	<u>Cumulative % of Total Value</u>
3	83 651	1 547	52
6	131 803	2 435	82
9	161 180	2 854	96
All Importers (12)	166 996	2 964	100

There were 12 known consignees/importers of ice hockey gloves during the period May to August 1991. The top three consignees/importers accounted for \$1.5 million or 52 per cent of the total dollar value of imports.

Name

Location

Canadian Tire Corp. Ltd.	Willowdale, Ont.
Canstar Sports Group Inc.	Mississauga, Ont.
Daignault Rolland Co. Ltd.	Montréal, Qué.
Davtec Sports Equipment Inc.	Daveluyville, Qué.
Easton Sports Canada Inc.	Ville St. Laurent, Qué.
Hillerich & Bradsby of Canada Ltd.	Wallaceburg, Ont.
Irwin Toy Ltd.	Toronto, Ont.
Jack Watson Sports Inc.	West Markham, Ont.
Karhu Canada Inc.	Lachine, Qué.
Sherwood Drolet Corp. Ltd.	Sherbrooke, Qué.
Sports Distributors of Canada Ltd.	Burlington, Ont.
Sport Maska Inc.	St. Hyacinthe, Qué.
	St. Jean-Sur-Richelieu, Qué.

ICE HOCKEY GLOVES

II. ANALYSIS OF IMPORTS (Cont'd)

FOREIGN EXPORTERS TO CANADA

MAY TO AUGUST 1991
(H.S. 4203.21.90.30)

There were a total of 13 exporters to Canada of ice hockey gloves during the period May to August 1991. They are listed below in descending order of dollar value.

<u>Name</u>	<u>Address</u>	<u>Value of Exports to Canada</u> (\$000)
Taiwan Sakurai Mfg. Co. Ltd.	Kaohsiung, Taiwan	805
Sakurai Philippines Corp.	Manila, Philippines	531
Korea Mega Sports Corp.	Seoul, Republic of Korea) 834*
Cortina Sports Industries Inc.	Tainan Hsien, Taiwan	
Ponderosa Leather Goods Co. Inc.	Rizal, Philippines) 482*
Pt. Komega Sports Indonesia	Surabaya, Indonesia	
Samyang Tongsang Co. Ltd.	Seoul, Republic of Korea	
Cortina Sports Industries (Thailand) Co. Ltd.	Bangkok, Thailand) 213*
Kyoto Leather Goods Corp.	Manila, Philippines	
Irwin Sports Inc.	Niagara Falls, NY, U.S.) 99*
CCM Maska U.S. Inc.	Bradford, VT, U.S.	
Karhu USA Inc.	South Burlington, VT, U.S.	
Ishar Dass Mahajan & Sons	Jalandhar City, India	
TOTAL		2 964

* Aggregated to preserve confidentiality of Canadian importers.

ICE HOCKEY GLOVES

III. IMPORT TRENDS

BY MAJOR COUNTRY OF ORIGIN

<u>Country of Origin</u>	<u>1989</u>	<u>1990</u>	<u>1991</u>	<u>1992*</u>	<u>Average Annual Growth Rate 1989-91 (%)</u>
Taiwan					
Value (\$000)	3 520	3 535	2 620	281	-13.7
Philippines					
Value (\$000)	97	1 228	1 112	-	238.7
Republic of Korea					
Value (\$000)	1 307	788	923	17	-16.0
Indonesia					
Value (\$000)	-	124	246	-	99.3
Thailand					
Value (\$000)	-	130	121	0	-6.7
United States					
Value (\$000)	29	20	19	0	-19.8
Sweden					
Value (\$000)	-	-	4	-	0.0
Pakistan					
Value (\$000)	2	10	3	-	31.4
India					
Value (\$000)	1	3	1	-	-14.3
Other					
Value (\$000)	<u>104</u>	<u>92</u>	<u>8</u>	<u>7</u>	<u>-91.4</u>
Total					
Value (\$000)	5 060	5 930	5 057	306	-0.0

Ranked in descending order by 1991 value.

* The latest year is cumulative to the first quarter.

ICE HOCKEY GLOVES

IV. CANADIAN SHIPMENTS

(H.S. 4203.21.90.30)

Statistics Canada reports that there were at least two Canadian establishments manufacturing hockey gloves in 1989 (latest year for which data are available). However, for reasons of confidentiality, separate data on shipments by Canadian establishments are not 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) 951-3510

Source: Catalogue #34-252, annual, "Clothing Industries".

ICE HOCKEY GLOVES

V. UNITED STATES IMPORTS

(H.S. 4203.21.70.00)

Country of Origin	1989	1990	1991	1992*	Average Annual Growth Rate 1989-91 (%)
Taiwan					
Quantity (Pair)	109 370	113 977	70 330	10 807	-19.8
Value (\$000)	2 035	2 658	1 681	315	-9.1
Republic of Korea					
Quantity (Pair)	34 832	33 288	14 089	76	-36.4
Value (\$000)	710	482	599	4	-8.2
Canada					
Quantity (Pair)	5 669	12 353	18 198	259	79.2
Value (\$000)	368	651	398	28	3.9
Philippines					
Quantity (Pair)	1 537	41 682	20 071	108	261.4
Value (\$000)	24	604	293	2	247.7
Fed. Rep. of Germany					
Quantity (Pair)	-	15 414	7 590	-	-50.8
Value (\$000)	-	326	140	-	-57.1
Indonesia					
Quantity (Pair)	-	1 757	6 211	-	253.5
Value (\$000)	-	35	107	-	203.7
Thailand					
Quantity (Pair)	6 480	14 459	6 239	-	-1.9
Value (\$000)	155	203	99	-	-20.3
Finland					
Quantity (Pair)	398	-	96	-	-50.9
Value (\$000)	27	-	9	-	-40.6
Italy					
Quantity (Pair)	20	109	35	-	32.3
Value (\$000)	1	7	2	-	68.3
Other					
Quantity (Pair)	13 258	421	-	312	-96.8
Value (\$000)	62	3	-	2	-94.9
TOTAL					
Quantity (Pair)	171 564	233 460	142 859	11 562	-8.7
Value (\$000)	3 382	4 969	3 327	351	-0.8

Ranked in descending order by 1991 value.

* The latest year is cumulative to the first quarter.

ICE HOCKEY GLOVES

VI. MARKET OVERVIEW

The Canadian market for ice hockey gloves consists of two distinct segments - goalie gloves (catchers/blockers) and skaters gloves. The goalie glove segment is supplied almost exclusively from domestic sources consisting of both major, internationally recognized Canadian hockey equipment manufacturers and smaller craft oriented operations specializing almost exclusively in goalie equipment. This segment of the market is well-served by Canadian producers with most innovation and research related to goalie equipment continuing to originate from these manufacturers. Although export statistics are not available, it is generally believed that Canada is the leading exporter of medium to high end goalie equipment.

The skaters gloves market segment (those worn by forwards and defensemen) is more fragmented. Although there are an increasing number of Canadian glove manufacturers who are expanding their hockey glove product offerings, in general the majority of the lower-to-medium range of gloves are still sourced from low cost Far East countries which supply not only importers but also several Canadian manufacturers who use them as supplements to their higher value gloves. It is estimated that at the import/wholesale cost level the Canadian market for skaters gloves is between \$10-15 million with approximately \$1.0 million exported, primarily to the USA and Western Europe.

Brand recognition has a major impact on consumer demand for hockey gloves and with increasing television exposure many suppliers use NHL players as a vehicle for obtaining this recognition. Other promotional vehicles are advertisements, endorsements and event sponsorship.

While there has been an increase in the number of both goalie and skaters Canadian glove manufacturers, it is possible that as a result of the recent signing of the North American Free Trade Agreement (NAFTA) between Canada, USA and Mexico, some suppliers may also examine the potential of sourcing low-end gloves from Mexico rather than the Far East.

J.W. Van Zant
Recreational and Household Products Directorate
(613) 954-3109

ICE HOCKEY GLOVES

CANADIAN SUPPLIERS

The following lists are taken from three sources: a) the Business Opportunities Sourcing System (BOSS), a computerized data bank established by the Federal Department of Industry, Science and Technology Canada; 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; and, c) other departmental sources. In all cases, information on Canadian products supplied is as given by the companies.

BOSS

Companies are arranged in alphabetical order.

Gloves, Hockey

<u>Name</u>	<u>Location</u>
*Brian's Custom Pro Manufacturing Ltd.	Kingsville, Ont.
*Canstar Sports Group Inc.	Montréal, Qué.
*Corporation Sherwood-Drolet Ltée	Sherbrooke, Qué.
*Daignault Rolland Compagnie Ltée	Montréal, Qué.
Heaton Custom Goalie Equipment	Harrow, Ont.
*John Brown Custom Sporting Equip. Ltd.	Collingwood, Ont.
Stri Sport Inc.	Angus, Qué.
Vaughn Custom Sports Canada Ltd.	London, Ont.

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

* Company engaged in export trade.

ICE HOCKEY GLOVES

CANADIAN SUPPLIERS (Cont'd)

DEPARTMENTAL SOURCES - Hockey Gloves

<u>Name</u>	<u>Location</u>
*Adams Custom Equipment Ltd.	Kelowna, B.C.
*Bayard Sport Inc.	Chambly, Qué.
*Davtec Sports Equipment Inc.	Daveluyville, Qué.
*Hillerich & Bradsby of Canada Ltd.	Wallaceburg, Ont.
*Kay Sports Equipment	Ottawa, Ont.

Any enquiries and/or comments regarding the Departmental Source list should be directed to J.W. Van Zant.

Recreational and Household Products Directorate
Tel.: (613) 954-3109
Fax.: (613) 954-3107

* Company engaged in export trade.

ICE HOCKEY GLOVES

TARIFFS

CANADIAN

Canadian imports included in this report are dutiable under the following Canadian tariff item:

<u>Tariff Item</u>	<u>Description of Goods</u>	<u>Year</u>	<u>Tariff Treatment - 1991-1992</u>		
			<u>Most Favoured Nation Tariff</u>	<u>General Preferential Tariff</u>	<u>United States Tariff</u>
	-Gloves, mittens and mitts:				
	--Specially designed for use in sports				
4203.21.90	---Other (includes hockey)	1991	25% BPT 18%	16.5%	17.5%
		1992	25% BPT 18%	16.5%	15%

TARIFF ARRANGEMENTS AND FOREIGN COUNTRIES OF EXPORT

Exporting countries as shown in this report which qualify for the Most Favoured Nation tariff treatment: Finland and Taiwan.

Exporting countries which qualify for the Most Favoured Nation tariff treatment or General System of Preference tariff treatment (In order to qualify for the General System of Preference, a special certificate of origin is required.): Philippines; Indonesia, Thailand, Republic of Korea, India.

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

ICE HOCKEY GLOVES

TARIFFS (Cont'd)

UNITED STATES

United States imports included in this report are 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>1</u>
4203.21.70	Ice hockey gloves	Free	30%

1 Notwithstanding any other provisions, the rates of duty 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	Mongolia
Albania	Republic (former)	North Korea
Bulgaria	Kampuchea	Romania
Cuba	Laos	Union of Soviet Socialist
Czechoslovakia	Latvia	Republics (former)
Estonia	Lithuania	Vietnam

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

ICE HOCKEY GLOVES

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For more information, contact the nearest ISTC Regional Office listed at the end of this publication or the Market Intelligence and Technology Opportunities Service at (613) 954-4040.



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Opportunities Service
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Industry, Science and Technology Canada
235 Queen Street
Ottawa, Ontario
K1A 0H5
Tel.: (613) 954-4970
Fax.: (613) 954-2340

OR
Recreational and Household Products Directorate
Consumer Products Branch
Industry, Science and Technology Canada
235 Queen Street
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K1A 0H5
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Fax.: (613) 954-3107

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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

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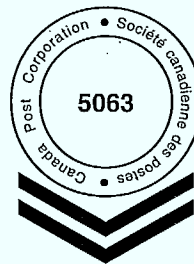
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