CANADA'S TRADE PERFORMANCE

VOLUME II

MANUFACTURING

1960-1978

Economic Intelligence Branch
Policy Planning
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CHAPTER I

INTRODUCTION

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1.1 PURPOSE OF STUDY

Volume I of Canada's Trade Performance[1] examined general developments in Canada's commodity trade from a number of perspectives including commodity composition, regional market developments, the relationship between exports and imports in the major industrial sectors and Canada's trade performance relative to that of other nations. Only one complete chapter of that study (Chapter IV) together with parts of others was devoted to manufacturing trade. Given the importance of manufacturing to the Canadian economy, and in keeping with the resposibility of the Department of Industry, Trade and Commerce for both industry and trade matters, this volume carries forward the study of manufacturing and examines that sector in greater detail as well as addressing a number of the issues concerning manufacturing trade that have arisen from time to time.

Its primary purpose is to provide a better understanding of the current situation in manufacturing trade through a study of overall past performance and the shifting patterns of trade within manufacturing. In doing so, the authors draw upon a number of valuable data bases, and a subsidiary purpose is to acquaint potential users of such data with the material that is available. The study is not intended as an evaluation of manufacturing performance *per se*, although trade performance would certainly be an important element in such an evaluation.

1.2 ORGANIZATION OF STUDY

In addition to setting out the purpose and organization of the study, this introductory chapter also outlines the importance of Canada's trade in manufactured products both to Canada and in relation to other countries.

The following ten chapters constitute the statistical heart of the study. Chapters II through X deal separately with those nine major industry groups within manufacturing which are of greatest current importance to Canada's two-way trade (or trade "turn-over"). Collectively, in 1978 these industries accounted for 87 percent of two-way trade in manufacturing and 94 percent of exports. Each of these chapters contains three sections; the first provides a brief profile of the industry group[2]; the second presents Canadian commodity trade data aggregated by industry

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[1] Department of Industry, Trade and Commerce, Canada's Trade Performance - 1960-1977, Volume I, General Developments, October, 1978.

[2] More extensive profiles can be found in individual industry Sector Task Force Reports prepared by ITC in 1978.

including such measures as export orientation, import penetration, self-sufficiency and the normalized trade balance[1]; and the third provides United Nations trade data for Canada and the other members of the Organization for Economic Cooperation and Development (OECD). In the latter two sections, group details are provided in tabular form together with a brief review of the more significant developments on an industry and industry group basis. The remaining eleven major groups are treated in Chapter XI. The tabular material is essentially the same as for those groups dealt with individually; however, the industry profiles are omitted and the accompanying text is a good deal briefer[2].

Chapter XII addresses some of the issues raised from time to time concerning Canada's manufacturing trade performance. These include questions about Canada's international competitiveness, her world share in manufacturing trade, import penetration, and the significance of trade balances. The concluding chapter pulls together the major factors responsible for the development in manufacturing trade over the period under review.

The trade by industry sector data employed in Chapter II to XI were created by the Economic Intelligence Branch[3] from Statistics Canada's import and export commodity data. Export commodities were allocated to those Standard Industrial Classification (SIC) industries which produce like commodities, and import commodities to those same industries had such commodities been manufactured in Canada. Such an allocation is by no means perfect for a number of reasons[4]; however, the data are considered to be

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1 Export orientation is defined as the ratio of domestic exports to shipments; import penetration as the ratio of imports less re-exports to the implicit Canadian market (in turn defined as shipments plus imports less both domestic exports and re-exports); implicit self-sufficiency as the ratio of shipments to the implicit Canadian market; and the normalized trade balance as the ratio of the trade balance (exports minus imports) to the trade turnover (domestic exports plus imports less re-exports). These definitions will be repeated periodically throughout the study for the convenience of the reader.

2 This asymetrical treatment was not done so much by choice as by the need to keep the size of this study within reasonable bounds.

3 Part of Policy Planning, Department of Industry, Trade and Commerce.

4 For example: all commodities of a given class are allocated to one industry, whereas in reality other industries may produce some of these commodities as a minor portion of their total output; some data on factor shipments are not available because of confidentiality or small sample size; valuation methods differ between trade measures and shipments; some commodity classes cannot be split between the relevant industries. The more outstanding anomalies are noted in the text.

sufficiently reliable to be useful in portraying major developments, particularly at the more aggregated levels. The purpose of this allocation is really an extension of the purpose of the SIC itself, namely: to allow users to relate trade data to other industry data such as shipments, employment, prices, profits etc., within a consistent and common framework. As such it fills an important gap in the statistical knowledge of industrial behaviour. It should be noted in passing, that both the export data and the import data exclude re-exports. Also, the time frame is 1967 to 1978. Apart from 1966 (omitted in order to provide the same base year as for the U.N. data), earlier data consistent with the 1967-1978 period are not available.

The third section of Chapters II through XI examine Canada's relative position as a supplier of the U.N. international trade data base maintained by ITC[1]. The time frame represented is 1967 to 1977, the latter being the most current year for which data are available[2]. Although compiled from national sources, these data are all in U.S. dollars. For purposes of this study, the U.N. data have been re-grouped to approximate Canadian manufacturing group definitions as used in the second section of these chapters. A complete match was not possible because of different concepts and definitions; however, these are not believed to be so large as to invalidate the conclusions drawn from the data in this study.

The total manufacturing data allows for some understanding of the changes which have taken place in markets and market shares. Such information however, masks the changes which took place in individual markets and individual industries. Within the individual markets many changes have taken place as to commodity import structure as well as their source. In these sections, the major shifts among country suppliers and the nature of shifts in import composition are outlined, and Canada's position and relative performance highlighted.

Lastly, unless otherwise noted, the concept of "manufacturing" employed throughout this study is essentially the dictionary definition that implicitly underlies Statistics Canada's standard industrial classification[3]. Basically it encompasses all <u>industries</u> (not commodities

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1 This part of the study is confined to the OECD because ITC purchases only 40 country tapes from the U.N. (of which 24 are OECD countries).

2 Data are available for the years 1962 to 1966; however, there are inconsistencies between these and the data for 1967 to 1977 which make intertemporal comparisons at the industry or commodity level rather questionable.

3 As far as is known, Statistics Canada has no formal definition of manufacturing apart from the list of those industries deemed to be manufacturers in the SIC scheme. In this sense, manufacturing is one of 12 industry divisions encompassing SIC numbers 101 to 399.

per se) that use raw materials or output from other industries to make a product suitable for further processing or consumption. It excludes the resource industries, services, construction and crafts. Although perhaps not generally perceived as a bone of contention, the seemingly simple notion of what should or should not be included within the portmanteau of "manufacturing" is intimately bound up with many of the issues concerning manufacturing trade and will be discussed at greater length in Chapter XII.

1.3 IMPORTANCE OF CANADA'S TRADE IN MANUFACTURED PRODUCTS

1.3.1 Importance of Manufacturing Activity to the Canadian Economy

Because of the historical development of the Canadian economy, an economy dominated by an enormous natural resource endowment relative to population size, manufacturing has not been as major a factor in that development as it has in so many other industrial countries. Even so, manufacturing plays an important and pivotal role in Canadian economic activity.

In 1978, manufacturing accounted for 22.5 percent of total real output (real domestic product). Over the period 1967 to 1978, manufacturing's share of total output was remarkably stable. Although there has been a mild tendency to rise and fall with the business cycle, that share has been consistently in the 22-24 percent range (see Table 1.1). In contrast to this fairly stable share of output, manufacturing's shares of employment and investment have declined over the period. The employmnt share has dropped from around 23 1/2 percent in 1967 to 19 1/2 percent in 1978. Similarly, the investment share has also dropped, although somewhat more eratically, from 18.4 percent of total investment in 1967 to 14.9 percent in 1978. As with output, manufacturing's share of corporation profits has tended to move with the business cycle and varied between 34 and 42 percent of total corporation profits. Manufacturing has been able to maintain its output and profit shares in the face of declining shares of primary inputs by reason of a better productivity record in manufacturing than for the economy as a whole. Output per person employed in manufacturing rose at an average annual rate of 3.2 percent over the 1967 to 1978 period compared to only 1.4 percent in non-manufacturing activities[1].

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1 Based on labour force survey data and RDP as used in Table 1.1. Statistics Canada's Aggregate Productivity Measures (Cat. No. 14-201) shows a 3.6 percent compound annual rate of growth for manufacturing on the basis of establishment survey data for employment.

TABLE 1.1

MANUFACTURING SHARE OF TOTAL ECONOMIC ACTIVITY

(percent)

	Output[1]	Employment[2]	Exports[3]	Investment[4]	Corporation Profits[5]
1967	23.2	23.4	58.0	18.4	37.7
1968	23.3	22.9	60.9	16.8	37.7
1969	23.6	23.0	61.7	17.6	40.2
1970	22.8	22.3	59.3	19.8	33.9
1971	22.8	21.8	59.2	17.1	38.1
1972	23.1	21.8	60.8	16.0	39.6
1973	23.5	22.0	59.6	16.3	40.3
1974	23.3	21.7	54.7	17.3	42.4
1975	21.7	20.2	54.1	16.5	36.4
1976	21.8	20.3	58.2	15.1	34.5
1977	21.7	19.6	60.7	15.6	34.5
1978	22.5	19.6	63.9	14.9	36.3

[1] Constant dollar RDP.

[2] Labour force data. Latest revisions only go back to 1970. 1967 to 1969 shares estimated by ITC.

[3] Both manufacturing and total exports (of goods and services) include re-exports. Manufacturing exports are on a customs value basis, while total exports of goods and services are on a national accounts (balance of payments) basis. The difference is small, however, and should have no significant impact on the levels or the trend.

[4] Excluding inventory change.

[5] Corporation profits before taxes, national accounts basis. According to the 1976 census of manufacturers, corporations account for 98 percent of total manufacturing shipments and employment.

Sources: For RDP, investment, and total exports of goods and services: CANSIM
For manufacturing exports: Economic Intelligence Branch, Policy Planning, ITC
For employment: Statistics Canada, Historical Labour Force Statistics (Cat. No. 71-201), 1974 and 1978
For corporation profits: Statistics Canada, Gross National Product Branch

With regard to exports, it is well known that much of Canada's total economic activity is directed towards satisfying world demand - 27 percent of Canada's Gross National Product was exported in 1978. What is not so often appreciated is the dominant influence of the manufacturing sector in our export trade. For the 1967-1978 period, total exports from the manufacturing sector accounted on average for over 70 percent of Canada's total exports of merchandise alone and about 60 percent of the export of all goods and services (Table 1.1).

TABLE 1.2

MANUFACTURING AS A SUPPLIER AND PURCHASER: 1974

	Proportion of other Sectors' Inputs Supplied By Manufacturing	Proportion of Output from Other Sectors Purchased by Manufacturing
	(percent)	
Agriculture	21.6	53.8
Forestry	4.4	80.7
Fishing, Hunting & Trapping	23.2	87.0
Mines, Quarries & Oil Wells	4.2	74.9
Construction[1]	32.3	1.4
Communication	3.5	9.2
Electric Power, Gas & Other Utilities	1.8	23.2
Transportation & Storage	9.7	3.9
Trade	3.7	10.3
Others[2]	14.0	13.6

[1] Manufacturing's use of construction output include only repair construction. Non-residential construction is a capital outlay that shows up as a component of final demand rather than as an intermediate input.

[2] Finance, Insurance and Real Estate, Business and Personal Services, Operating Office Supplies, Travel Promotion and Advertising.

Source: Statistic Canada, The Input-Output Structure of the Canadian Economy (Cat. No. 15-508E).

In addition to the direct contribution to total activity, of course, manufacturing plays a very key role indirectly through its demand for inputs from the other sectors of the economy, and through the dependence of those sectors on manufacturing output[1]. Courtesy of Statistics Canada's 1974 input-output tables (the latest available), Table 1.2 provides a snapshot of the use by manufacturing of the output from other sectors and the use in turn by those sectors of manufacturing output.

1.3.2 Importance of Exporting to Canadian Manufacturing

Given that manufactured goods are of major importance in Canada's export trade, just how important are exports to Canadian manufacturing? Simply put, they are currently very important and getting more so every year. The proportion of total manufacturing shipments[2] that is exported (i.e., export orientation) increased from 21 percent in 1967[3] to almost 30 percent in 1978 (Table 1.3) as export growth outpaced shipment growth with an average annual increase of 15 percent compared to 11.6 percent. Nearly one-third of the jobs and income generated in the manufacturing sector are derived directly from export sales.

Furthermore, as shown in Table 1.4, with but a few minor exceptions, the growth in export orientation over the period 1967 to 1978 has been widely distributed over the industry groups found within manufacturing. Naturally, some industries are much more export oriented than others. Currently, export sales are crucial to the transportation equipment, paper and allied, machinery, wood and primary metals industries, while being of little consequence to knitting mills and tobacco products; printing, publishing and allied; petroleum and coal products and clothing industries.

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1 The regional aspects of manufacturing activity, including trade, are also very important but these are beyond the scope of this study.

2 Because "shipments" includes inter-firm sales, this measure understates the importance of exports. At the same time, this is unlikely to have any significant effect on trends in export orientation.

3 And from about 16 1/2 percent in 1965, the first year of the Autopact.

TABLE 1.3

TOTAL MANUFACTURING: TRADE MEASURES, 1967 TO 1978

YEAR	DOMESTIC EXPORTS	ADJUSTED IMPORTS[1]	TRADE BALANCE	TRADE TURNOVER (EXPORTS + IMPORTS)	CANADIAN FACTORY SHIPMENTS	CANADIAN MARKET[2]	TRADE BALANCE / TRADE TURNOVER	SHIPMENTS / CANADIAN MARKET	EXPORT ORIENTATION	IMPORT PENETRATION
	(MILLIONS OF DOLLARS)						(PERCENT)			
1967	8,225	8,886	-661	17,111	38,955	39,617	-3.9	98.3	21.1	22.4
1968	9,842	10,202	-359	20,044	42,062	42,421	-1.8	99.2	23.4	24.0
1969	11,168	11,976	-809	23,144	45,930	46,739	-3.5	98.3	24.3	25.6
1970	12,162	11,709	453	23,871	46,381	45,928	1.9	101.0	26.2	25.5
1971	12,724	13,188	-464	25,912	50,276	50,739	-1.8	99.1	25.3	26.0
1972	14,502	15,881	-1,378	30,383	56,191	57,569	-4.5	97.6	25.8	27.6
1973	17,749	19,664	-1,914	37,413	66,674	68,589	-5.1	97.2	26.6	28.7
1974	20,588	25,387	-4,799	45,975	82,455	87,254	-10.4	94.5	25.0	29.1
1975	21,149	27,230	-6,081	48,380	88,427	94,508	-12.6	93.6	23.9	28.8
1976	25,756	29,897	-4,141	55,654	98,076	102,217	-7.4	95.9	26.3	29.2
1977	31,057	34,320	-3,263	65,377	109,747	113,010	-5.0	97.1	28.3	30.4
1978	38,898	41,221	-2,323	80,120	130,353	132,675	-2.9	98.2	29.8	31.1

[1] Total imports less re-exports; [2] Shipments plus imports less exports.

Source: Economic Intelligence Branch, Policy Planning, ITC.

TABLE 1.4

EXPORT ORIENTATION[1] OF CANADIAN MANUFACTURING, 1967 AND 1978
(percent)

	1967	1978
All Manufacturing	21.1	29.8
Industry Groups:		
Transportation Equipment	46.2	75.7
Paper and Allied	49.5	54.8
Machinery	36.1	53.0
Wood	39.1	49.2
Primary Metal	47.6	47.7
Chemical & Chemical Products	14.5	24.2
Electrical Products	10.3	17.9
Food & Beverage	9.1	11.4
Non-metallic Mineral Products	5.5	11.2
Rubber & Plastics Products	4.8	10.4
Leather	4.8	8.7
Metal Fabricating	3.0	6.8
Furniture and Fixture	1.9	6.6
Textile	3.9	6.3
Clothing	2.1	4.0
Petroleum and Coal Products	1.2	3.9
Printing, Publishing & Allied	1.6	3.0
Knitting Mills	1.9	1.4
Tobacco Products	0.6	0.5
Miscellaneous Manufacturing	24.5	19.4

1 Defined here as the ratio of the value of domestic exports to shipments

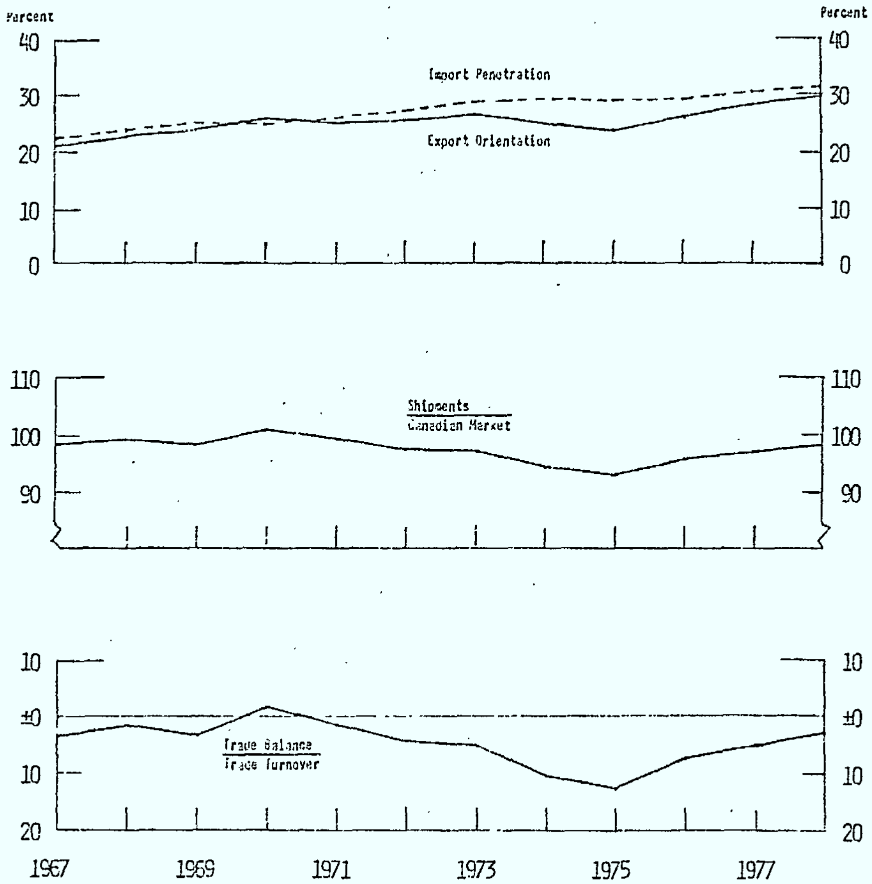
Source: Economic Intelligence Branch, Policy Planning, ITC.

1.3.3 Imports, Import Penetration and Self-Sufficiency

In 1978, about 29 percent of final domestic demand[1] in Canada was satisfied by imported goods and services, and of these imported goods and services, 62 percent were manufactured goods. In fact, the manufactured goods share of total imports was around this level throughout the 1967-1978 period. At the same time, the import penetration of Canadian markets for manufactured products rose from 22.4 percent in 1967 to 31.1 percent in 1978 (Table 1.4).

CHART 1.1

TOTAL MANUFACTURING: SELECTED TRADE MEASURES



Source: Economic Intelligence Branch, Policy Planning, ITC.

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1 Final domestic demand consists of the sum of consumer expenditures, government current expenditures on goods and services, and expenditures on gross fixed capital formation.

Although import penetration varies considerably from market to market (Table 1.5), the increase over the period under review has been very pervasive, affecting all markets with the interesting exception of that for petroleum and coal products. Import penetration is understandably the highest in the market for transportation equipment (because of the Autopact), but it is also very high in the market for industrial machinery, accounting for 75 percent of this market in 1978.

Even though the import penetration of domestic markets has grown substantially over this period, that increase has more-or-less matched the increase in the export orientation of Canadian producers (Table 1.3 and Chart 1.1). On balance, Canadian manufacturers as a whole were at least implicitly capable of supplying over 97 percent of domestic requirements on average over the whole period. This implicit self-sufficiency, as measured by the ratio of domestic shipments to the Canadian market[1], was virtually the same in 1978 as it was in 1967 (98.2 versus 98.3 percent), although it did move cyclically over the period, hitting a peak of 101 percent in 1970 and a trough of 93.6 percent in 1975 (Table 1.3).

1.3.4 Canada in the World Market for Manufactured Goods

As noted in Volume I of Canada's Trade Performance[2], the growth in total world merchandise trade over the last two decades was spectacular with a ten-fold increase in value (13.7 percent per annum) between 1960 and 1978. The most spectacular period was the 1970's with an average annual increase of 19.3 percent compared to 9.4 percent in the 1960's[3]. The volume of merchandise trade rose over one third more than world industrial production over the period as a whole with an increase of 7.5 percent per annum compared to 6.2 percent for industrial production.

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1 The implicit Canadian market is defined as shipments plus total imports less total exports including re-exports. (Alternatively it can be calculated using domestic exports with re-exports deducted from imports).

2 p. 5

3 Based on data in UNCTAD, 1979 Handbook of International Trade and Development Statistics, (United Nations, 1979), Table 1.1. Here, the 1960's represent 1960 to 1970; the 1970's 1970 to 1978 because of data availability.

TABLE 1.5

IMPORT PENETRATION[1] OF CANADIAN MARKETS FOR MANUFACTURED PRODUCTS, 1967 AND 1978

(percent)

	1967	1978
All Manufacturing	22.4	31.1
Industry Groups:		
Transportation Equipment	50.0	76.7
Machinery	64.4	74.9
Electrical Products	22.3	39.2
Leather	15.1	32.9
Chemical & Chemical Products	22.9	32.2
Textile	22.7	27.1
Knitting Mills	12.0	26.8
Primary Metal	23.6	26.0
Rubber & Plastics Products	14.3	23.1
Non-metallic Mineral Products	15.5	17.4
Metal Fabricating	12.7	15.4
Printing, Publishing & Allied	12.9	14.7
Furniture and Fixture	5.1	12.5
Food & Beverage	6.2	10.3
Wood	8.0	9.6
Clothing	5.4	9.6
Paper and Allied	5.3	9.5
Petroleum & Coal Products	11.0	3.7
Tobacco Products	1.0	1.6
Miscellaneous Manufacturing	49.0	54.5

1 Defined here as the ratio of imports less re-exports to the implicit Canadian market which in turn is defined as shipments plus imports less exports.

Source: Economic Intelligence Branch, Policy Planning, ITC.

As was also noted in Volume I, however, the price/volume mix in the 1970's was quite different from that of the 1960's as world commodity prices took off in 1973. In volume terms, world merchandise trade rose only 6.1 percent per annum in the 1970's compared to 8.1 percent in the 1960's. In contrast, prices rose only 1.3 percent per annum in the 1960's compared to a rather steamy 12.6 percent in the 1970's[1].

Although data on trade in manufactured goods is neither as comprehensive nor as current as that for total merchandise trade, it is sufficient to show that, in value terms, manufacturing exports outperformed non-manufacturing with an average annual increase for 1960 to 1978 of 14.5 percent for manufactured goods versus 12.5 percent for non-manufacturing (Table 1.6). The value of manufactured goods exports rose somewhat less than did the value of non-manufactured exports in the 1970's (18.8 vs 20.1 percent per annum). This was the result of the rapid commodity price increases between 1972 and 1974 which were somewhat muted at the manufacturing level, implying both time lags and the inability of other input prices to keep pace with those of industrial commodities.

On the basis of data for the developed market economies[2], the volume of manufactured exports rose quite a bit faster than that for other merchandise exports between 1960 and 1978 -- 8.3 versus 5.4 percent per annum, while prices rose at a slightly slower pace -- 5.7 versus 6.1 percent per annum (see Table 1.6)[3]. The values of both manufactured and non-manufactured exports rose more rapidly in the 1970's than in the 1960's as prices increased very rapidly in the later period, particularly between 1972 and 1974. At the same time, volumes grew more slowly in the 1970's for both export categories.

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1 Based on data in United Nations, Monthly Bulletin of Statistics, April 1979, Special Table B, and May, 1979, Special Table A for the period 1960 to 1977.

2 The U.N. classification of developed market economies includes Canada, the U.S.A., Japan, Western Europe (including Yugoslavia but excluding Turkey), Israel, South Africa, Australia and New Zealand. It thus comes close to encompassing the same countries that belong to the OECD. It differs from the latter group in that it excludes Turkey and includes Israel, South Africa and Yugoslavia.

3 Data on the price and volume of manufactured goods are available only for the developed market economies. However, such countries accounted for about 83 percent of the value of world manufacturing exports throughout the 1960-1978 period and, in addition, displayed a similar growth pattern. This suggests that such data can be treated as reasonable proxies for complete world data.

TABLE 1.6

MERCHANDISE EXPORTS: WORLD AND DEVELOPED MARKET ECONOMIES

AVERAGE ANNUAL RATE OF GROWTH OF VALUE, VOLUME AND PRICE[1]
SELECTED PERIODS, 1960 TO 1978

	1960-1965	1965-1970	1970-1975	1975-1978	1960-1970	1970-1978	1960-1978
			(percent)				
World							
All Merchandise:							
Value	7.9	10.9	22.7	13.7	9.4	19.3	13.7
Volume[2]	6.8	9.3	5.7	6.6	8.1	6.1	7.5
Price[2]	0.7	1.9	16.4	6.6	1.3	12.6	6.2
Manufactures: Value	9.4	13.0	20.7	15.7	11.2	18.8	14.5
Non-Manufactures: Value	5.9	7.7	26.1	10.7	6.8	20.1	12.5
Developed Market Economies							
All Merchandise:							
Value	8.5	11.8	20.8	14.5	10.1	18.4	13.7
Volume	7.4	9.7	6.0	7.2	8.6	6.5	7.6
Price	0.9	2.1	13.9	7.0	1.5	11.3	5.7
Manufactures:							
Value	9.2	13.3	20.8	15.2	11.3	18.6	14.5
Volume	7.9	10.8	7.1	6.9	9.3	7.0	8.3
Price	1.2	2.4	12.7	7.8	1.8	10.9	5.7
Non-Manufactures:							
Value	6.9	7.8	20.9	12.2	7.4	17.6	11.8
Volume	6.5	6.2	2.1	8.0	6.4	4.3	5.4
Price	0.7	1.5	18.3	4.0	1.1	12.7	6.1

1 Unit value

2 Market economies only

Note: Based on data from:

(1) UNCTAD, *1979 Handbook of International Trade Statistics*, (United Nations, 1979) Tables 1.1, 2.1, and 2.3, and

(2) United Nations, *Monthly Bulletin of Statistics*, April, 1979, special Table B, and June, several years, Special Tables on Manufactured Goods Exports.

Throughout the 1960's and into the early 1970's, the distribution of merchandise exports continuously shifted towards manufactured products in both value and volume terms (Table 1.7). Although the value share dropped in 1973 as the prices of materials outstripped those of manufactured goods, it has since resumed its upward trend as the earlier commodity price increases made their way through the distribution system and into the prices of those manufactured products traded in world markets. In comparison, the volume share of manufactured exports has remained fairly stable since 1974, even dipping slightly in 1978.

TABLE 1.7

DEVELOPED MARKET ECONOMIES:
MANUFACTURING SHARE OF TOTAL EXPORTS

(percent)

	Current U.S. $	Constant (1970) U.S. $
1960	68.0	69.0
1965	70.3	71.3
1970	75.2	75.2
1971	75.6	75.8
1972	75.8	76.3
1973	74.1	78.3
1974	74.5	79.1
1975	75.1	79.4
1976	75.7	79.4
1977	76.2	79.7
1978	76.5	78.9

Note: For sources see Table 1.6.

The substitution of manufactured for non-manufactured exports from 1960 to the present was no doubt largely due to relative price shifts even though U.N. price data show only a 6.4 percent drop in the price of manufactured exports relative to the price of other merchandise exports for the entire 1960 to 1978 period. Such data unfortunately exclude tariffs and thus do not adequately reflect the impact of the general tariff reductions that occurred nor that of the creation and expansion of common trading areas.

Within this more-or-less global picture, the volume of Canadian manufactured exports outstripped that of the other developed market economies between 1960 and 1978 with an average annual increase of 9.9 percent for Canada versus 8.2 percent for the latter (Table 1.8). In consequence, Canada's trade share in manufactured exports as measured by volume rose from 4.2 percent in 1960 to 5.5 percent in 1978 (Table 1.9). This was probably at least in part a reflection of the fact that Canadian export prices for manufactured goods did not rise nearly as rapidly as those of the other developed market economies (3.6 versus 5.8 percent per annum). Canadian prices for manufactured exports thus displayed a decline relative to those of the other developed market economies of 2 percent per year over this entire period.

TABLE 1.8

MANUFACTURED EXPORTS: CANADA AND OTHER DEVELOPED MARKET ECONOMIES
AVERAGE ANNUAL RATE OF GROWTH OF VALUE, VOLUME AND PRICE[1]
SELECTED PERIODS: 1960 TO 1978

	1960-1965	1965-1970	1970-1975	1975-1978	1960-1970	1970-1978	1960-1978
Canada:							
Value	8.6	20.7	11.4	16.1	14.5	13.1	13.9
Volume	9.4	16.3	3.7	11.2	12.8	6.5	9.9
Price	-0.9	3.8	7.4	4.5	1.4	6.3	3.6
Other Developed Market Economies:							
Value	9.2	13.0	21.2	15.2	11.1	18.9	14.5
Volume	7.8	10.4	7.4	6.4	9.1	7.0	8.2
Price	1.2	2.4	13.0	8.0	1.8	11.1	5.8

1 Unit Value

Note: For sources see Table 1.6.

This relative price decline outweighed Canada's more rapid volume growth so that the value of Canada's manufactured exports grew somewhat more slowly than that of the other developed market economies at 13.9 percent per annum versus 14.5 percent (Table 1.8). As a result, and in contrast to the volume share, Canada's value share of manufactured exports was down slightly in 1978 compared to 1960 (Table 1.9). Granted, it did rise in the latter half of the 1960's fall in the first half of the 1970's and then rise slightly in 1976 to about the same level as that which prevailed in the early 1960's. On balance, however, Canada's real share in manufactured goods has increased, while its value share has not. Although there are strict limits to the inferences one can draw from aggregate data, the data do suggest that Canada's manufactured exports have not been particularly sensitive to relative prices changes (that they have been price inelastic), and that the value of Canada's manufactured exports would probably have risen more rapidly had Canadian price not declined relative to those of other countries.

TABLE 1.9

CANADA'S SHARE OF MANUFACTURED EXPORTS

(percent)

	Share of World Exports	Share of Exports From Developed Market Economies	
	Current U.S. $	Current U.S. $	Constant (1970) U.S. $
1960	3.6	4.3	4.2
1965	3.5	4.2	4.5
1970	4.8	5.7	5.7
1971	4.6	5.5	5.5
1972	4.3	5.2	5.5
1973	3.8	4.5	5.4
1974	3.4	4.1	4.9
1975	3.2	3.8	4.9
1976	3.5	4.2	5.0
1977	3.4	4.1	5.2
1978	3.2	3.9	5.5

Note: For sources see Table 1.6.

The failure to increase its share of trade as measured by value coincides with Canada's unchanged ranking of ninth place among the world's exporters of manufactured goods (Table 1.10), although we did rank eighth in 1970-72. Over the period, Canada was overtaken by the Netherlands by a small margin -- a smaller economy than Canada's but one that depends on exports to an even greater extent than does Canada[1], while, in turn, Canada overtook the U.S.S.R. The significance of the relative decline of Canada's export prices for manufactured goods also shows itself in Canada's ranking. In constant dollar (volume) terms, Canada's rank was seventh in both 1960 and 1978 (see Table 1.10), although for much of the period Canada did rank eighth behind Belgium-Luxembourg.

TABLE 1.10

RANKING OF WORLD'S TOP TEN EXPORTERS OF MANUFACTURED GOODS

	Current U.S. $				Constant (1970) U.S. $[1]			
Rank	1960		1978		1960		1978	
				(billions)				
1.	U.S.A.	13.0	Germany	125.6	U.S.A.	16.1	Germany	50.6
2.	Germany	10.1	U.S.A.	94.6	Germany	12.4	U.S.A.	49.2
3.	U.K.	8.7	Japan	94.3	U.K.	10.6	Japan	39.1
4.	France	5.1	France	59.5	France	5.8	France	24.8
5.	Japan	3.6	U.K.	57.6	Japan	3.7	U.K.	23.7
6.	Bel.-Lux.	3.1	Italy	45.0	Bel.-Lux.	3.6	Italy	22.9
7.	Italy	2.7	Bel.-Lux.	35.3	CANADA[2]	2.9	CANADA	16.0
8.	U.S.S.R.	2.6	Neth.	27.2	Italy[2]	2.9	Bel.-Lux.	15.3
9.	CANADA	2.5	CANADA	26.0	Neth.	2.4	Neth.	11.3
10.	Neth.	2.1	Switz.	22.2	Switz.	2.3	Switz.	7.2

1 Developed Market economies only.

2 Tied for seventh

Note: For sources see Table 1.6.

1 The 1977 export shares of Gross Domestic Product (U.N. definition) were: Canada 24.0 percent; the Netherlands 50.1 percent.

As with total exports, the U.S. dominates Canada's trade in manufactured goods. As defined by Statistics Canada's SIC, the U.S. share of Canada's exports followed the U.S. business cycle and, in the latter half of the 1960's, was heavily influenced by the developments under the Autopact. It rose sharply from 67.3 percent in 1965 to 75.1 percent in 1969, fell off in 1970, rebounded to 75.1 percent in 1972, dropped again in 1974 and 1975 and then rebounded once again to 74.9 percent in 1977[1] (see Table 1.11). Over the period, the share of our manufactured exports going to the United Kingdom steadily dropped and pulled with it the share going to the EEC. The shares going to the other EEC countries and to Japan both rose somewhat.

The dominance of the U.S. naturally affected the share of Canada's exports taken by the OECD as a whole, although the fluctuations are somewhat more muted than in the U.S. share - the shares going to the other OECD countries tending to collectively move in a somewhat counter-(U.S.) cyclical fashion.

Over the period from 1967 to 1977 the OECD imports of manufactured goods increased almost five-fold, an average annual increase of 16.9 percent. During this period, many changes took place in the market shares of the countries fulfilling this demand. While year to year changes are to be expected and are demonstrated (Table 1.12), a number of longer term trends of more serious consequence are also delineated. In general, the EEC, Japan and other developing market economies increased their market shares at the expense of the United States, Canada and the other developed market economies.

Canada's market share of OECD imports peaked in 1968 and declined righ up to 1975 when it was 4.7 percent, before picking up slightly in 1976. Over the eleven year period, Canada's exports maintained about the same dependency in the OECD markets. Within the OECD, however, changes took place as the EEC, particularly the United Kingdom, played a smaller role and Japan and the other OECD countries played increasingly more important ones.

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1 79.0 percent according to the U.N. definition.

TABLE 1.11

ALL MANUFACTURING: PERCENTAGE OF CANADA'S EXPORTS BY DESTINATION

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	OECD Share 1977
O.E.C.D.	87.7	89.0	89.9	86.8	88.5	89.4	89.8	88.1	85.7	87.3	88.8	100.0
United States	69.7	73.1	75.1	68.8	73.7	75.1	73.8	70.9	69.6	71.8	74.9	84.3
Japan	2.2	2.0	2.1	2.2	1.7	1.9	2.7	2.7	2.4	2.5	2.6	2.9
E.E.C. (9)	12.6	11.0	9.9	12.6	10.2	10.1	10.4	11.1	10.8	10.2	8.7	9.8
United Kingdom	8.5	7.3	6.0	7.5	6.1	5.9	5.8	5.8	4.9	4.4	3.8	4.3
Rest of World	12.3	11.0	10.1	13.2	11.5	10.6	10.2	11.9	14.3	12.7	11.2	

TABLE 1.12

ALL MANUFACTURING: OECD IMPORTS BY SOURCE

DISTRIBUTION AND AVERAGE ANNUAL RATE OF CHANGE

	DISTRIBUTION											Percent Change
	percent											
	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1967-1977
Total Imports	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	
Developed Market Economies												
West Germany	14.2	14.4	14.6	15.0	15.3	15.2	15.7	15.4	15.2	14.9	14.9	0.5
United States	14.3	14.4	14.3	13.8	12.7	12.1	11.8	12.1	12.3	12.0	11.3	- 2.3
France	6.1	6.0	6.1	6.5	6.9	7.3	7.3	7.0	7.6	7.2	7.4	2.0
Japan	4.3	4.8	5.0	5.5	6.1	6.4	5.6	5.8	5.7	6.4	6.7	4.5
United Kingdom	8.0	7.6	7.5	7.3	7.2	6.8	6.3	6.0	6.3	6.2	6.3	- 2.4
Canada	6.3	6.9	6.8	6.5	6.5	6.1	5.4	5.0	4.7	5.2	5.2	- 1.3
Total EEC (9)	45.4	45.4	45.8	46.5	47.6	47.8	47.8	47.0	48.2	46.9	47.0	0.3
Other Developed Market Economies	14.7	14.0	14.0	14.3	14.1	14.4	14.9	14.0	14.0	13.5	13.4	- 0.9
OPEC	2.0	1.9	1.6	1.6	1.5	1.3	1.5	2.4	1.9	2.2	2.1	0.5
Other Developing Market Economies	9.5	9.3	9.3	9.1	7.8	8.9	9.8	10.3	9.7	10.2	10.7	1.2
Centrally Planned Economies	3.6	3.3	3.1	2.9	3.7	3.0	3.3	3.5	3.6	3.6	3.5	- 0.3
ADDENDUM												
Total Imports in Millions of U.S. Dollars	114,215	130,057	152,533	176,422	195,501	236,284	323,239	414,557	414,572	478,247	546,275	

1 For source and notes see Table 2.6.

2 For source and notes see Table 2.7.

CHAPTER II

TRADE IN FOOD AND BEVERAGES

CHAPTER II
TRADE IN FOOD AND BEVERAGES

2.1 CHARACTERISTICS OF THE DOMESTIC INDUSTRIES

The activities of the domestic food and beverage industries encompass the processing of Canadian and foreign resources from the agricultural sector into a variety of manufactured products for human and animal consumption. The industries[1] range from slaughtering, meat and fish processing to flour and feed mills, to dairies, bakeries and confectionary producers. The group also includes fruit and vegetable canning, vegetable oil mills, sugar refineries and other miscellaneous food and feed manufacturers. The beverage industries include manufacturers of soft drinks, breweries, wineries and distilleries.

The concentration of production[2] is very high in several industries within the food and beverage group, especially in frozen fruit and vegetable processing, flour and breakfast cereal production, biscuit making, cane and beet sugar processing and vegetable oil mills. On the other hand, poultry processing, dairy products, the feed industry and bakeries show quite low concentration as measured by shipments, value added, and employment. Foreign ownership in the group, mostly U.S., accounts for about 11 percent of establishments, controlling slightly over one third of the group's shipments[3].

The food and beverage group is the largest sub-sector of manufacturing in terms of factory shipments. As shown in Table 2.1, food and beverage shipments in 1978 accounted for 17.2 percent of total Canadian manufacturing shipments, while group employment accounted for more than 13 percent. The group generated close to $5 billion in two-way trade but this was heavily concentrated in certain industries. Relative to other groups in manufacturing, the trade shares of the food and beverage group are significantly below the shares of output and employment.

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1 1970 SIC codes 101 to 109

2 Industrial Organization and Concentration in the Manufacturing, Mining and Logging Industries, Statistics Canada, 1974;

3 Domestic and Foreign Control of Manufacturing, Mining and Logging Establishments in Canada, Statistics Canada, 1974.

TABLE 2.1

FOOD AND BEVERAGE INDUSTRIES

SELECTED INDICATORS

	1967	1978	Average Annual Rate of Growth 1967-1978	1978 Share of Total Manufacturing Activity
			(percent)	
REAL DOMESTIC PRODUCT (Constant $, millions)	2,247.5	2,970.9	2.6	11.7
SHIPMENTS ($ millions)	7,429	22,362	10.5	17.2
DOMESTIC EXPORTS ($ millions)	674	2,540	12.8	6.5
IMPORTS LESS RE-EXPORTS ($ millions)	444	2,265	16.0	5.5
EMPLOYMENT (000's)	202	209	0.3	13.1
PROFITS ($ millions)	547	1,426	9.1	10.9
INVESTMENT ($ millions)	364.9	815.7	7.6	8.5

Source: Statistics Canada: Real Domestic Product; Manufacturing Industries Canada; Inventories, Shipments and Orders; Employment, Earnings and Hours; Industrial Corporations Financial Statistics; Private and Public Investment.

2.2 TRADE DEVELOPMENTS, 1967 TO 1978

Domestic exports of the food and beverage industries rose from $674 million in 1967 to $2.5 billion in 1978 (Table 2.2). The average annual growth rate in this period was 12.8 percent, more than 2 percentage points less than for overall manufacturing. Nevertheless, the export orientation of this group increased modestly from 9.1 percent in 1967 to 11.4 percent in 1978. In the 1960's the increase was slight, and during the 1970's dipped in 1974 prior to an export recovery from 1975 through to 1978.

TABLE 2.2

FOOD AND BEVERAGE INDUSTRIES: TRADE MEASURES, 1967 TO 1978

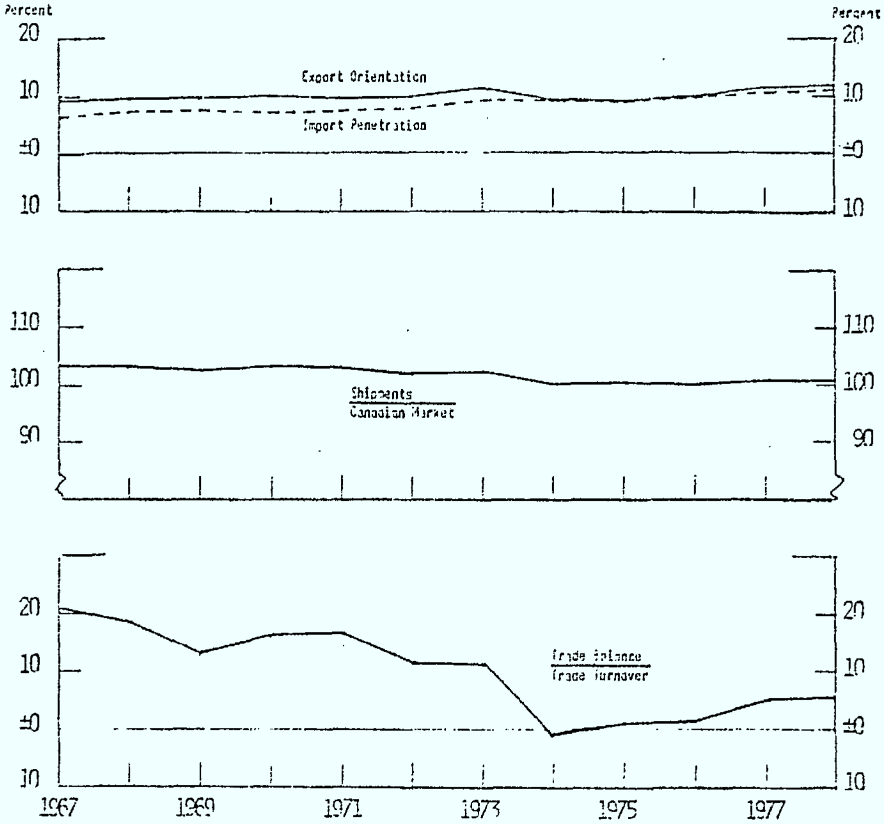
YEAR	DOMESTIC EXPORTS	ADJUSTED IMPORTS[1]	TRADE BALANCE	TRADE TURNOVER (EXPORTS + IMPORTS)	CANADIAN FACTORY SHIPMENTS	CANADIAN MARKET[2]	TRADE BALANCE / TRADE TURNOVER	SHIPMENTS / CANADIAN MARKET	EXPORT ORIENTATION	IMPORT PENETRATION
	(MILLIONS OF DOLLARS)						(PERCENT)			
1967	674	444	230	1,119	7,429	7,199	20.6	103.2	9.1	6.2
1968	692	477	215	1,169	7,674	7,459	18.4	102.9	9.0	6.4
1969	763	583	181	1,346	8,224	8,043	13.4	102.2	9.3	7.2
1970	840	591	249	1,431	8,639	8,390	17.4	103.0	9.7	7.0
1971	879	617	262	1,496	9,111	8,849	17.5	103.0	9.7	7.0
1972	987	783	204	1,770	10,207	10,003	11.5	102.0	9.7	7.8
1973	1,373	1,089	284	2,462	12,375	12,091	11.5	102.3	11.1	9.0
1974	1,265	1,295	-30	2,560	14,738	14,768	-1.2	99.8	8.6	8.8
1975	1,405	1,378	27	2,783	16,459	16,432	1.0	100.2	8.5	8.4
1976	1,651	1,616	35	3,267	17,292	17,256	1.1	100.2	9.5	9.4
1977	2,100	1,894	206	3,994	19,196	18,989	5.2	101.1	10.9	10.0
1978	2,540	2,265	275	4,804	22,362	22,087	5.7	101.2	11.4	10.3

[1] Total imports less re-exports; [2] Shipments plus imports less exports.

Imports of the food and beverage group during the period increased at a faster rate than exports. Rising from $444 million to $2.3 billion in 1978, their average annual increase was 16 percent, more than three percentage points higher than for exports. While import penetration rose more than 4 percent, from 6.2 to 10.3 percent, the major effect was a decreasing normalized surplus (trade balance/trade turnover) from 20.6 percent in 1967 to a modest deficit of 1.2 percent in 1974. The trade recovery in 1975-1978 reversed this trend and the normalized surplus in 1978 recovered to 5.7 percent.

CHART 2.1

FOOD AND BEVERAGE INDUSTRIES: SELECTED TRADE MEASURES



The food and beverage industries that contributed most heavily to the overall export performance of this industry group during the 1967-1978 period include fish products, slaughtering and meat processing, distilleries, flour and breakfast cereals and vegetable oils (Table 2.3). Except for slaughtering and meat processing, their export orientation is clearly established (between 22 and 74 percent in 1978). However, only fish products indicated a consistently rising trend in this measure over time as well as an above average growth rate. This latter was accompanied by an increasing import penetration in the domestic market which close to doubled in the 1967-1978 period from 24 to 42 percent. The effect of increased imports was very moderate in products of distilleries and quite modest for flour and breakfast cereals.

TABLE 2.3

FOOD AND BEVERAGE INDUSTRIES: EXPORTS AND EXPORT ORIENTATION BY INDUSTRY, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
					(MILLIONS OF DOLLARS)							
DOMESTIC EXPORTS												
TOTAL	674	692	763	840	879	987	1,373	1,265	1,405	1,651	2,100	2,540
MEAT & POULTRY PRODUCTS INDUSTRIES	106	113	124	159	156	198	296	248	263	337	389	503
SLAUGHTERING & MEAT PROCESSORS	106	113	123	158	153	197	293	238	260	335	387	501
POULTRY PROCESSORS	0	0	1	1	3	2	3	10	3	2	3	2
FISH PRODUCTS INDUSTRY	180	190	206	204	219	263	411	357	369	497	682	943
FRUIT & VEGETABLE PROCESSING	42	39	39	41	35	49	65	68	71	85	96	95
DAIRY PRODUCTS INDUSTRY	34	32	36	52	69	52	90	67	47	64	92	93
FLOUR & BREAKFAST CEREAL PROD. IND.	72	68	66	80	78	71	82	92	142	176	166	202
FEED INDUSTRY	19	17	21	23	27	32	38	43	40	55	70	68
BAKERY PRODUCTS INDUSTRIES	9	11	15	15	15	17	25	31	28	27	28	37
BISCUIT MFRS.	6	7	10	11	11	12	16	21	18	18	18	21
BAKERIES	3	4	4	4	5	5	9	11	10	9	10	17
MISC. FOOD INDUSTRIES, N.E.S.	60	54	57	69	81	82	118	144	176	148	259	271
CONFECTIONERY MFRS.	7	9	10	12	13	13	17	15	12	14	20	29
CANE & BEET SUGAR PROCESSORS	3	3	2	2	3	4	15	24	55	24	49	48
VEGETABLE OIL MILLS	23	22	20	29	32	31	42	42	32	47	97	106
MISC. FOOD PROCESSORS, N.E.S.	27	20	25	26	32	34	45	63	77	64	94	89
BEVERAGE INDUSTRIES	151	168	201	197	198	222	247	214	269	260	319	327
SOFT DRINK MFRS.	0	1	1	1	1	1	1	1	1	1	2	3
DISTILLERIES	142	160	191	185	186	210	232	195	245	225	274	273
BREWERIES	8	8	9	10	11	10	15	18	23	34	43	51
WINERIES	0	0	0	0	0	0	0	0	0	1	0	1
EXPORT ORIENTATION					(PERCENT)							
TOTAL	9.1	9.0	9.3	9.7	9.7	9.7	11.1	8.6	8.5	9.5	10.9	11.4
MEAT & POULTRY PRODUCTS INDUSTRIES	5.4	5.6	5.5	6.8	6.5	6.8	7.8	6.1	6.0	7.3	7.9	8.0
SLAUGHTERING & MEAT PROCESSORS	6.1	6.4	6.3	7.7	7.2	7.7	8.9	6.6	6.8	8.4	9.0	9.2
POULTRY PROCESSORS	0.2	0.2	0.2	0.4	1.1	0.5	0.6	2.0	0.5	0.3	0.4	0.3
FISH PRODUCTS INDUSTRY	62.5	58.4	60.8	57.5	57.2	59.1	66.2	62.0	63.8	67.0	68.9	73.6
FRUIT & VEGETABLE PROCESSING	8.4	7.6	7.2	7.5	6.2	7.7	9.1	7.9	7.3	8.1	8.1	7.0
DAIRY PRODUCTS INDUSTRY	2.8	2.5	2.7	3.8	4.7	3.3	5.2	3.2	1.8	2.3	3.0	2.6
FLOUR & BREAKFAST CEREAL PROD. IND.	24.1	24.4	22.1	26.1	26.2	22.4	22.8	14.3	25.3	29.3	27.0	31.2
FEED INDUSTRY	3.7	3.3	3.8	3.9	4.5	4.8	3.9	3.5	3.2	4.3	4.7	3.9
BAKERY PRODUCTS INDUSTRIES	1.6	1.8	2.3	2.4	2.4	2.4	3.1	3.3	2.6	2.4	2.5	2.9
BISCUIT MFRS.	5.1	5.7	7.7	8.3	7.7	7.0	8.3	8.8	6.7	6.4	6.7	7.3
BAKERIES	0.7	0.8	0.9	0.8	0.9	1.0	1.5	1.5	1.2	1.1	1.1	1.7
MISC. FOOD INDUSTRIES, N.E.S.	9.4	8.0	8.0	5.1	5.5	5.2	6.2	5.3	5.9	5.0	7.5	7.1
CONFECTIONERY MFRS.	3.5	4.1	4.2	4.9	5.5	5.2	5.3	4.0	2.8	2.8	3.7	4.7
CANE & BEET SUGAR PROCESSORS	2.2	2.1	1.3	1.1	1.2	1.5	4.4	3.6	7.5	5.0	11.4	11.2
VEGETABLE OIL MILLS	22.2	23.9	19.8	23.4	23.6	19.1	19.2	14.2	11.2	14.9	23.6	21.9
MISC. FOOD PROCESSORS, N.E.S.	4.2	2.9	3.5	3.3	3.8	3.8	4.3	4.6	5.0	3.8	4.5	3.9
BEVERAGE INDUSTRIES	16.2	17.0	18.5	17.2	15.7	16.3	16.3	12.2	13.4	12.5	13.7	13.0
SOFT DRINK MFRS.	0.0	0.2	0.2	0.2	0.2	0.2	0.1	0.1	0.1	0.2	0.2	0.3
DISTILLERIES	50.7	53.1	56.3	53.8	49.1	52.7	53.6	40.0	40.9	44.6	44.5	46.1
BREWERIES	2.3	2.2	2.5	2.6	2.5	2.1	2.7	2.9	3.3	4.6	5.3	5.9
WINERIES	0.4	0.2	0.4	0.4	0.3	0.3	0.4	0.6	0.4	0.7	0.4	0.9

By far the largest proportion of products in the food and beverage sector is produced for the Canadian market. Industries concerned with slaughtering and meat processing, poultry processing, production and distribution of dairy products, soft drinks, bakery goods and biscuits are very broadly based, in Canada and elsewhere, and are geared to their local and regional markets. In many instances, the nature of the product and its perishability, e.g. fresh meat, fish, poultry, milk etc. places certain demands on packaging and transportation over long distances which may limit a potential market. The generally low measures of export orientation and import penetration are well portrayed in Tables 2.3 and 2.5. The industries are virtually self-sufficient with only modest fluctuations in this measure over time (see Table 2.4).

It is also clearly apparent that several industries show a definite lack of self-sufficiency. Wineries are the most notable but relative import dependence also characterizes fruit and vegetable processing, confectionery goods, vegetable oil mills and the miscellaneous food product industries.

For products that have a considerable import dependence, major contributing factors can be found in the Canadian climate, taste, product differentiation and quality as well as economic factors of production. In most instances, the imports in this group of industries consist of products not produced domestically, e.g. fruit and vegetables imported in off-season and including processed tropical and semi-tropical items. Further, they may include products with special brand, quality or geographic identification. Imports of directly competitive products, however, are significant in some areas, e.g. fruit and vegetable processing and confectionary products.

Table 2.5 shows import penetration of the domestic market of the order of 20 to 55 percent, generally uncompensated on the export side. Secondly, except for vegetable oils, the average annual rates of increase for imports during the period 1967 to 1978 exceeded those of exports by a good margin.

Among those industries, the degree of import penetration rose moderately for fruit and vegetable processing and miscellaneous food products, and rose quite substantially for confectionery and wineries. Here an accent on taste, quality and established lines provided major reasons for this trend. A modestly decreased import penetration of vegetable oils can be noted - up to 1973 - but followed by an increase in the last four years.

CHAPTER III

TRADE IN WOOD PRODUCTS

TABLE 2.4

FOOD AND BEVERAGE INDUSTRIES: SHIPMENTS AND IMPLICIT SELF-SUFFICIENCY[1] BY INDUSTRY, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
						(MILLIONS OF DOLLARS)						
FACTORY SHIPMENTS												
TOTAL	7,429	7,674	8,224	8,639	9,111	10,207	12,375	14,738	16,459	17,292	19,196	22,362
MEAT & POULTRY PRODUCTS INDUSTRIES	1,968	2,025	2,228	2,345	2,421	2,910	3,776	4,090	4,392	4,618	4,955	6,258
SLAUGHTERING & MEAT PROCESSORS	1,734	1,773	1,942	2,061	2,121	2,551	3,289	3,579	3,829	3,990	4,308	5,456
POULTRY PROCESSORS	234	252	285	284	300	359	488	511	563	628	647	802
FISH PRODUCTS INDUSTRY	289	325	339	355	384	444	621	576	579	742	990	1,282
FRUIT & VEGETABLE PROCESSING	499	510	537	544	568	631	716	865	982	1,055	1,176	1,371
DAIRY PRODUCTS INDUSTRY	1,232	1,281	1,356	1,369	1,463	1,574	1,716	2,083	2,613	2,811	3,065	3,504
FLOUR & BREAKFAST CEREAL PROD. IND.	300	280	296	306	298	319	361	479	562	602	612	647
FEED INDUSTRY	517	513	543	586	605	667	974	1,222	1,257	1,293	1,499	1,712
BAKERY PRODUCTS INDUSTRIES	596	609	620	640	648	708	786	965	1,067	1,112	1,146	1,274
BISCUIT MFRS.	119	125	134	137	138	168	187	238	271	280	275	286
BAKERIES	477	484	486	503	510	540	598	727	796	833	871	988
MISC. FOOD INDUSTRIES, N.E.S.	643	677	715	1,350	1,464	1,592	1,911	2,704	3,002	2,982	3,432	3,798
CONFECTIONERY MFRS.	206	221	229	240	247	259	312	375	442	489	527	610
CANE & BEET SUGAR PROCESSORS	144	152	175	204	228	267	336	651	738	472	425	428
VEGETABLE OIL MILLS	105	94	101	123	136	160	218	296	289	312	410	484
MISC. FOOD PROCESSORS, N.E.S.	643	677	715	782	853	906	1,046	1,382	1,534	1,709	2,071	2,276
BEVERAGE INDUSTRIES	931	987	1,085	1,143	1,261	1,361	1,514	1,754	2,006	2,077	2,320	2,516
SOFT DRINK MFRS.	289	305	337	358	392	413	484	579	733	751	799	917
DISTILLERIES	281	301	340	344	379	399	433	488	500	504	615	592
BREWERIES	335	349	373	399	438	485	532	613	694	736	812	880
WINERIES	26	31	36	42	52	64	65	75	80	86	94	128
SHIPMENTS/CANADIAN MARKET						(PERCENT)						
TOTAL	103.2	102.9	102.2	103.0	103.0	102.0	102.3	99.8	100.2	100.2	101.1	101.2
MEAT & POULTRY PRODUCTS INDUSTRIES	101.1	100.9	98.9	101.1	101.1	100.1	100.6	100.2	100.3	98.1	100.2	101.0
SLAUGHTERING & MEAT PROCESSORS	101.4	101.2	98.9	101.3	101.3	100.3	100.9	100.2	100.7	98.7	100.8	101.7
POULTRY PROCESSORS	98.8	98.9	99.2	99.6	100.3	98.7	98.8	99.7	97.8	94.6	95.9	96.8
FISH PRODUCTS INDUSTRY	201.3	191.8	193.9	173.5	171.8	170.3	195.7	172.1	169.5	174.7	188.3	219.4
FRUIT & VEGETABLE PROCESSING	88.5	86.5	85.3	86.9	85.3	85.5	83.7	82.6	83.7	84.8	81.7	79.7
DAIRY PRODUCTS INDUSTRY	101.3	101.1	101.2	102.3	103.2	101.2	101.4	99.5	99.7	100.3	100.9	100.4
FLOUR & BREAKFAST CEREAL PROD. IND.	128.9	128.9	125.6	132.0	132.0	125.2	123.2	118.5	128.3	136.8	130.2	139.5
FEED INDUSTRY	103.3	102.6	102.8	102.9	103.4	103.6	102.8	102.5	101.8	103.0	103.4	102.6
BAKERY PRODUCTS INDUSTRIES	100.0	100.2	100.7	100.6	100.6	100.6	101.3	101.3	100.5	99.8	99.3	100.0
BISCUIT MFRS.	100.4	100.6	103.1	103.1	102.3	102.5	104.1	100.3	102.2	100.8	100.3	100.4
BAKERIES	99.9	100.1	100.0	100.0	100.1	100.0	100.5	100.4	100.0	99.5	99.0	99.8
MISC. FOOD INDUSTRIES, N.E.S.	89.6	87.9	88.0	93.0	94.4	93.1	92.8	90.7	91.7	90.8	91.7	90.3
CONFECTIONERY MFRS.	91.3	90.9	91.7	90.9	91.6	89.7	89.8	85.9	85.4	87.0	82.5	83.8
CANE & BEET SUGAR PROCESSORS	97.4	98.0	98.6	98.8	99.1	99.3	100.8	96.1	100.7	99.1	109.4	108.7
VEGETABLE OIL MILLS	81.3	77.0	75.1	79.3	86.4	85.0	62.5	73.3	74.2	76.4	84.4	83.9
MISC. FOOD PROCESSORS, N.E.S.	96.0	94.4	94.6	94.7	95.4	93.9	93.7	94.4	93.8	93.0	92.9	90.7
BEVERAGE INDUSTRIES	112.3	114.2	114.4	113.1	110.5	110.9	108.4	104.4	104.9	104.6	104.3	101.3
SOFT DRINK MFRS.	99.2	99.5	99.5	99.6	99.5	99.5	99.5	99.4	99.4	99.6	99.4	99.3
DISTILLERIES	169.8	179.3	186.0	183.1	163.4	171.8	166.4	135.1	139.6	142.8	143.6	138.9
BREWERIES	101.9	101.7	102.1	102.1	102.0	101.7	102.2	102.3	102.5	103.8	104.4	102.9
WINERIES	60.3	67.5	57.4	60.4	60.1	61.8	50.1	54.4	48.9	50.8	43.7	45.7

1 Ratio of shipments to Canadian market

TABLE 2.5

FOOD AND BEVERAGE INDUSTRIES: IMPORTS AND IMPORT PENETRATION BY INDUSTRY, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
	(MILLIONS OF DOLLARS)											
ADJUSTED IMPORTS												
TOTAL	444	477	583	591	617	783	1,089	1,295	1,378	1,616	1,894	2,265
MEAT & POULTRY PRODUCTS INDUSTRIES	84	94	148	134	129	196	274	241	248	425	381	439
SLAUGHTERING & MEAT PROCESSORS	81	91	145	132	127	190	265	230	232	388	351	410
POULTRY PROCESSORS	3	3	3	2	2	6	9	12	15	37	30	29
FISH PRODUCTS INDUSTRY	35	34	42	54	59	79	107	116	132	180	218	245
FRUIT & VEGETABLE PROCESSING	107	118	131	123	133	156	204	250	262	274	359	446
DAIRY PRODUCTS INDUSTRY	18	18	20	21	25	33	65	77	55	57	64	78
FLOUR & BREAKFAST CEREAL PROD. IND.	5	5	5	6	6	7	14	18	18	14	23	18
FEED INDUSTRY	3	4	6	7	7	9	12	13	17	17	20	24
BAKERY PRODUCTS INDUSTRIES	9	10	10	11	12	13	14	19	22	29	36	38
BISCUIT MFRS.	6	6	6	7	8	8	8	11	13	16	18	20
BAKERIES	4	3	4	4	4	5	6	8	10	13	19	18
MISC. FOOD INDUSTRIES, N.E.S.	135	147	155	171	168	201	268	421	449	451	568	681
CONFECTIONERY MFRS.	27	31	30	36	36	43	52	77	88	87	132	146
CANE & BEET SUGAR PROCESSORS	7	6	5	5	5	6	12	50	50	28	12	14
VEGETABLE OIL MILLS	48	50	54	61	54	59	88	149	133	143	173	198
MISC. FOOD PROCESSORS, N.E.S.	53	59	66	69	73	93	116	146	178	194	252	323
BEVERAGE INDUSTRIES	49	45	65	64	78	88	130	140	175	168	223	296
SOFT DRINK MFRS.	2	2	2	2	2	3	3	4	6	4	6	9
DISTILLERIES	27	27	34	32	39	43	59	69	79	74	87	107
BREWERIES	2	2	2	2	2	2	3	4	6	6	9	26
WINERIES	18	15	27	28	35	40	65	63	84	84	121	153
IMPORT PENETRATION	(PERCENT)											
TOTAL	6.2	6.4	7.2	7.0	7.0	7.8	9.0	8.8	8.4	9.4	10.0	10.3
MEAT & POULTRY PRODUCTS INDUSTRIES	4.3	4.7	6.6	5.8	5.4	6.7	7.3	5.9	5.7	9.0	7.7	7.1
SLAUGHTERING & MEAT PROCESSORS	4.7	5.2	7.4	6.5	6.0	7.5	8.1	6.4	6.1	9.6	8.2	7.6
POULTRY PROCESSORS	1.4	1.3	1.0	0.8	0.8	1.7	1.8	2.2	2.7	5.6	4.5	3.4
FISH PRODUCTS INDUSTRY	24.4	20.3	23.9	26.2	26.4	30.3	33.8	34.6	38.6	42.3	41.4	42.0
FRUIT & VEGETABLE PROCESSING	18.9	20.1	20.8	19.7	20.0	21.1	23.9	23.9	22.4	22.1	25.0	25.9
DAIRY PRODUCTS INDUSTRY	1.5	1.4	1.5	1.6	1.7	2.2	3.9	3.7	2.1	2.0	2.1	2.2
FLOUR & BREAKFAST CEREAL PROD. IND.	2.2	2.5	2.2	2.5	2.7	2.9	4.9	4.4	4.1	3.3	5.0	3.9
FEED INDUSTRY	0.6	0.9	1.1	1.2	1.2	1.4	1.2	1.1	1.4	1.4	1.4	1.4
BAKERY PRODUCTS INDUSTRIES	1.5	1.6	1.7	1.8	1.8	1.9	1.8	2.0	2.1	2.6	3.2	3.0
BISCUIT MFRS.	4.8	5.2	4.8	5.4	5.6	4.7	4.5	4.8	4.7	5.6	6.4	6.9
BAKERIES	0.8	0.7	0.8	0.8	0.9	1.0	1.0	1.1	1.2	1.6	2.1	1.8
MISC. FOOD INDUSTRIES, N.E.S.	18.8	19.1	19.1	11.8	10.8	11.7	13.0	14.1	13.7	13.7	15.2	16.2
CONFECTIONERY MFRS.	11.9	12.8	12.1	13.5	13.4	15.0	15.0	17.5	17.0	15.4	20.6	20.1
CANE & BEET SUGAR PROCESSORS	4.8	4.1	2.7	2.4	2.1	2.1	3.6	7.4	6.8	5.8	3.1	3.4
VEGETABLE OIL MILLS	36.7	41.4	39.8	39.2	34.0	31.2	33.3	37.0	34.2	35.0	35.6	34.4
MISC. FOOD PROCESSORS, N.E.S.	7.9	8.3	8.8	8.4	8.2	9.7	10.4	9.9	10.9	10.5	11.3	12.9
BEVERAGE INDUSTRIES	5.9	5.2	6.8	6.4	6.9	7.2	9.3	8.3	9.1	8.5	10.0	11.9
SOFT DRINK MFRS.	0.8	0.7	0.7	0.7	0.6	0.7	0.6	0.7	0.8	0.6	0.8	1.0
DISTILLERIES	16.3	15.8	18.6	16.8	16.8	18.7	22.8	19.0	23.6	20.9	20.4	25.1
BREWERIES	0.5	0.5	0.5	0.5	0.5	0.4	0.6	0.7	0.9	0.9	1.1	3.1
WINERIES	40.0	32.7	42.9	39.8	40.1	38.4	50.1	46.0	51.3	49.6	56.5	54.7

2.3 CANADA'S SHARE OF OECD IMPORTS, 1967 TO 1977

In 1977 the OECD imported over $60 billion U.S. of food and beverages, of which Canada's share was $1.9 billion U.S. or 3.1 percent (Table 2.6).

The major suppliers to the OECD were the Netherlands, France, the United States and West Germany. Geographically, there has clearly been a shift since 1967 in the pattern of OECD imports in favour of the European Economic Community. The EEC accounted for 31.8 percent of food and beverage imports in 1967 and 40.9 percent by the end of the period, an average annual increase of 2.6 percent. The only other country having a significant increase was Brazil which increased its share to 2.9 percent from 1.7 percent.

Canada's share remained relatively constant from 1967 to 1971. It then declined over the following four years hitting a low of 2.6 percent in the 1974-75 recession. A partial recovery took place in 1976 and 1977 resulting in a share at the end of the period of 3.1 percent. These patterns largely reflect Canada's performance in the U.S. market, which accounted for 46.4 percent of its total food and beverage exports and 58 percent of its OECD exports (Table 2.7). In 1972 and 1973 the U.S. market grew more slowly than the total OECD, as a result Canada's OECD share declined even though it maintained its position in the U.S. In 1974 Canada's U.S. share hit its lowest level at 8.6 percent recovering in 1975. It was not until the U.S. market itself recovered in 1976-1977 that Canada's overall share once again increased. The only country in which Canada improved its market share was Japan with an increase from 2.0 percent in 1967 to 5.7 percent in 1977. (Table 2.9). During this period the Japanese market grew increasingly important in terms of Canada's exports, increasing at a rate of 21.7 percent per year. The Japanese market was generally the fastest growing, as a result, this increase helped dampen the effect of the U.S. market decline. Following their joining the EEC and Canada's loss of preferential tariff treatment, the United Kingdom has continued to play a declining role with its share of Canada's exports decreasing at the rate of 10 percent per year.

Fresh and simply preserved fish represented 36.4 percent of the total OECD imports from Canada. This is a large increase from 26.2 percent in 1967. This commodity is one of the fastest growing imports of the OECD at 19.5 percent annually. Unfortunately, imports from Canada grew at only 17.5 percent, consequently Canada's share of this rather important market has declined over the period. Alcoholic beverages represent the second largest group of imports from Canada with 16.2 percent of the total import value. Canada's market share of these commodities decreased throughout the period and represented only 6.3 percent by 1977. On the positive side Canada had increasing market shares of many commodities including: meat, fresh, chilled or frozen; beans, peas, lentils; cereal preparations; and feeding-stuff for animals. (Table 2.10).

TABLE 2.6

FOOD AND BEVERAGES: OECD IMPORTS BY SOURCE[1]

DISTRIBUTION AND AVERAGE ANNUAL RATE OF CHANGE

	DISTRIBUTION percent											Percent Change
	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1967-1977
Total Imports	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	
Developed Market Economies:												
Netherlands	7.3	8.2	8.4	8.9	9.2	8.9	9.0	9.1	9.8	10.1	9.7	2.9
France	5.3	6.2	6.4	6.5	7.5	7.9	7.8	7.6	8.0	7.8	7.8	3.9
United States	6.5	6.2	6.5	6.4	6.5	6.3	7.0	6.4	5.9	7.2	6.8	0.5
West Germany	2.9	3.2	3.5	3.7	4.0	4.3	4.8	5.8	6.1	6.0	6.6	8.6
Denmark	6.1	5.6	5.1	5.0	4.8	4.6	4.9	4.7	5.0	4.7	4.6	- 2.8
United Kingdom	3.8	4.0	3.9	3.8	3.9	3.7	3.5	3.7	4.0	4.0	3.9	0.3
Australia	4.4	4.4	4.6	4.6	4.6	5.4	5.6	3.9	3.4	4.2	3.4	- 2.5
Belgium-Luxembourg	2.3	2.5	2.8	3.0	3.0	3.3	3.3	3.4	3.5	3.6	3.3	3.7
Canada	3.7	3.9	3.8	3.8	3.7	3.4	3.4	2.6	2.6	3.0	3.1	- 1.8
Italy	2.2	2.4	2.3	2.6	2.8	3.1	2.7	2.7	3.0	3.0	3.0	3.2
Ireland	1.9	1.7	1.6	1.7	1.8	1.7	1.5	1.6	2.1	2.0	2.1	1.0
Japan	1.8	1.9	1.6	1.7	1.7	1.7	1.3	1.3	0.9	1.1	0.8	- 7.8
Total EEC (9)	31.8	33.7	34.0	34.9	37.0	37.5	37.6	38.6	41.4	41.2	40.9	2.5
Other Developed Market Economies	14.8	14.1	13.8	13.4	13.6	13.8	13.2	11.8	11.1	11.3	11.0	- 2.9
OPEC	3.3	3.0	3.2	3.0	2.5	2.3	2.5	2.3	2.1	2.4	2.6	- 2.4
Other Developing Market Economies	27.8	27.6	27.6	27.7	24.6	25.5	24.8	28.5	28.2	25.5	27.6	- 0.1
Brazil	1.7	1.9	2.4	2.5	2.5	2.9	3.4	3.7	3.3	2.9	3.6	7.8
Centrally Planned Economies	5.9	5.3	5.0	4.5	5.7	4.5	4.6	4.6	4.5	4.2	3.7	4.6
ADDENDUM												
Total Imports in Millions of U.S. Dollars	15,964	16,602	18,535	21,053	23,323	28,647	40,135	46,642	49,202	51,783	60,099	

Source: UN Commodity Trade Statistics, ITC International Trade Data Bank.

Note: 1. Other Developed Market Economies - includes Turkey together with certain miscellaneous items unclassified as to country.

2. OPEC includes the 13 members of OPEC together with several smaller oil related economies (e.g. the Netherlands Antilles).

3. Other Developing Market Economies - excludes Turkey.

4. Due to rounding, columns may not add exactly.

.. insignificant in terms of units shown.

\- indicates no imports from source shown.

TABLE 2.7

FOOD AND BEVERAGES: PERCENTAGE OF CANADA'S EXPORTS BY DESTINATION

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	OECD Share 1977
O.E.C.D.	80.8	83.4	84.1	83.7	88.4	84.8	85.7	80.6	79.3	80.8	80.9	100.0
United States	52.7	57.5	60.6	60.8	56.9	55.5	54.2	50.8	50.4	48.4	46.4	57.4
Japan	2.2	2.5	3.1	3.7	5.1	8.1	10.7	9.5	11.2	13.7	15.7	19.4
E.E.C. (9)	23.0	21.2	17.9	16.0	18.2	18.4	17.3	16.3	14.0	15.3	15.4	19.0
United Kingdom	17.0	15.9	13.1	11.7	13.1	12.4	10.7	9.8	6.8	7.5	5.9	7.3
Rest of World	19.2	16.6	15.9	16.3	16.6	15.2	14.3	19.4	20.7	19.2	19.1	

Source: Statistics Canada; External Trade Division, Export Publications.
Department of Industry, Trade and Commerce; (Economic Intelligence Group, Policy Planning Branch).

Note: Due to rounding, columns may not add exactly.

.. insignificant in terms of units shown.

TABLE 2.8

FOOD AND BEVERAGES: GROWTH OF FOREIGN IMPORTS

(percent)

	OECD	U.S.A.	JAPAN	EEC (9)*	OTHER OECD	DEVELOPING COUNTRIES**
1967	-	-	-	-	-	-
1968	4.0	13.9	8.3	-4.5	6.3	1.0
1969	11.6	3.6	25.5	10.4	15.6	5.8
1970	13.6	14.5	15.3	9.8	16.1	16.2
1971	10.8	4.9	19.2	5.4	17.0	18.2
1972	22.8	17.2	41.6	16.9	26.8	9.6
1973	40.1	24.8	68.5	38.7	42.6	32.2
1974	16.2	26.0	16.2	4.1	20.5	39.7
1975	5.5	-10.3	14.6	-0.6	13.5	11.2
1976	5.2	6.1	11.7	7.6	2.4	5.7
1977	16.1	9.3	13.2	24.1	14.7	31.7

TABLE 2.9

FOOD AND BEVERAGES: CANADA'S TRADE SHARE BY MARKET

(percent)

1967	3.7	11.9	2.0	2.6	0.3	4.7
1968	3.9	12.0	1.7	2.6	0.3	4.3
1969	3.8	13.0	1.8	2.5	0.4	4.4
1970	3.8	12.7	2.5	2.4	0.4	4.5
1971	3.7	12.4	3.3	2.6	0.4	3.9
1972	3.4	11.7	3.7	2.5	0.3	3.5
1973	3.4	12.3	4.2	2.5	0.3	3.7
1974	2.6	8.6	3.1	2.2	0.3	3.3
1975	2.6	10.0	3.5	2.0	0.3	3.4
1976	3.0	10.9	4.4	2.5	0.3	3.6
1977	3.1	11.3	5.7	2.4	0.3	3.2

* Excluding intra-trade.
** Exports of OECD countries to the developing countries including OPEC.
.. Changes are less than 0.05 percent.
\- No percentage change available for 1967 over 1966.

Source: UN <u>Commodity Trade Statistics</u>, ITC International Trade Data Bank.

TABLE 2.10

FOOD AND BEVERAGES: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE OECD[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
			Total OECD Imports		Imports from Canada	
	Total OECD Imports	Imports from Canada	1967	1977	1967	1977
TOTAL, FOOD AND BEVERAGES	14.2	12.3	100.0	100.0	100.0	100.0
Meat, fresh, chilled or frozen	13.9	18.0	14.1	13.7	7.1	11.7
Meat, dried, salted or smoked	4.5	- 8.8	2.4	1.0	0.7	0.1
Meat preparations	9.9	7.7	3.9	2.7	0.6	0.4
Milk and cream	15.8	4.4	1.7	1.9	1.2	0.6
Butter	9.2	42.5	3.1	2.0	..	..
Cheese and curd	15.3	- 8.6	3.3	3.7	1.9	0.2
Eggs	14.5	21.3	0.9	0.9	0.2	0.5
Fish, fresh and simply preserved	19.3	16.1	6.8	10.6	26.2	36.4
Fish preparations	12.5	11.0	2.6	2.3	6.8	6.0
Meal and flour of wheat	13.0	- 19.5	0.1	0.1	1.4	..
Meal and flour of cereals	10.6	- 15.7	0.1	0.1	..	..
Cereal preparations	18.7	17.4	1.5	2.2	2.7	4.2
Dried fruit	12.6	18.7	1.0	0.9	..	..
Fruit, preserved	13.9	5.9	3.9	3.8	1.7	1.0
Beans, peas, lentils, etc.	12.6	16.0	1.0	0.9	1.3	1.8
Vegetables, frozen	20.1	5.6	0.3	0.6	1.0	0.6
Vegetable products, roots and tubers	18.6	21.4	0.7	1.1	..	[illegible]
Vegetables, preserved	16.8	7.3	2.5	3.2	1.4	[illegible]
Raw sugar	12.8	47.8	3.9	3.4	..	[illegible]
Refined sugar	8.0	108.0	4.0	2.3	..	1.3
Molasses	11.3	- 17.7	0.8	0.6	..	..
Sugars and syrups	16.9	9.1	0.3	0.4	1.2	0.9
Sugar confectionary	17.6	6.3	0.6	0.8	0.3	0.2
Cocoa	19.5	34.8	4.1	6.5	..	0.2
Chocolate	18.8	11.4	1.0	1.5	0.7	0.6
Tea and maté	9.5	12.8	3.0	2.0	0.4	0.5
Spices	14.8	11.1	0.7	0.8	..	..
Feeding-stuff for animals	15.4	22.2	0.7	0.7	1.5	3.6
Oil-seed cake	15.0	6.4	4.6	5.0	3.3	1.9
Meat and fish meal	7.5	5.5	2.3	1.3	1.5	0.8
Food wastes	19.8	4.3	1.3	2.1	2.5	1.2
Margarine and shortening	16.2	25.9	0.4	0.5	..	..
Food preparations	18.7	6.6	1.1	1.6	1.5	0.9
Non-alcoholic beverages	25.3	50.1	0.1	0.3	..	..
Alcoholic beverages	13.1	8.0	8.1	7.4	23.8	16.2
Hides and skins, undressed	11.4	14.2	3.9	3.1	2.3	2.7
Crude animal materials	11.3	2.6	2.5	1.9	3.9	1.6
Animal oils and fats	11.4	17.0	1.6	1.3	1.5	2.3
Fixed vegetable oils, soft	12.1	7.5	2.5	2.1	0.7	0.4
Other fixed vegetable oils	17.9	8.5	2.0	2.8	0.2	0.1

1 For source and notes see Table 2.8.

TABLE 2.11

FOOD AND BEVERAGES: CANADA'S SHARE OF IMPORTS BY THE OECD[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, FOOD & BEVERAGES	3.7	3.9	3.8	3.8	3.7	3.4	3.4	2.6	2.6	3.0	3.1
Meat, fresh, chilled or frozen	1.9	2.2	2.0	2.7	2.8	2.4	2.4	2.1	2.3	2.6	2.6
Meat, dried, salted or smoked	1.1	1.2	1.1	1.0	0.7	0.7	0.6	0.7	0.4	0.4	0.3
Meat preparations	0.6	0.5	0.6	0.7	0.6	0.6	0.7	0.6	0.5	0.4	0.5
Milk and cream	2.7	1.5	2.1	3.2	3.2	0.7	3.7	1.0	0.2	0.9	1.0
Butter	..	-	-	..	0.5	0.1	-	-	..	..	..
Cheese and curd	2.1	2.8	2.0	1.9	2.2	1.5	0.6	0.6	0.3	0.3	0.2
Eggs	1.0	0.5	0.7	2.3	1.2	0.8	1.9	1.9	1.5	1.3	1.7
Fish, fresh and simply preserved	14.1	14.9	14.2	13.0	11.8	11.1	11.1	8.7	9.4	9.7	10.7
Fish preparations	9.4	8.6	10.0	6.5	7.8	7.8	9.9	8.0	6.1	6.1	8.2
Meal and flour of wheat	37.5	28.8	24.9	18.8	16.6	17.0	5.1	7.7	4.2	1.4	1.3
Meal and flour of cereals	0.2	0.1	..	0.5	0.1	..	..	..	-	..	..
Cereal preparations	6.6	5.9	6.7	7.3	6.5	6.3	6.5	7.6	7.4	6.6	5.9
Dried fruit	..	..	..	..	0.1	..	0.1	..	..	..	..
Fruit, preserved	1.6	1.4	1.1	1.1	0.8	0.8	0.9	1.1	0.9	0.8	0.8
Beans, peas, lentils, etc.	4.5	2.4	4.1	4.1	5.5	7.9	7.4	7.2	7.6	8.4	6.1
Vegetables, frozen	11.1	10.8	6.9	5.1	1.0	0.9	1.3	2.4	3.2	6.1	3.1
Vegetable products, roots and tubers	..	0.2	0.2	0.1	0.2	0.1	0.1	..	0.1	..	0.1
Vegetables, preserved	2.0	1.9	2.4	2.2	1.5	1.1	0.9	0.7	0.7	1.0	0.9
Raw sugar	..	..	-	-	-	-	-	-	..	0.1	0.2
Refined sugar	..	..	..	-	..	..	0.3	..	0.9	0.5	1.8
Molasses	0.2	0.1	0.1	0.1	..	0.1	0.1	0.1	0.1	0.1	..
Sugars and syrups	16.1	11.6	11.4	9.6	9.3	10.4	8.9	5.8	6.5	8.3	8.1
Sugar confectionary	2.0	3.1	2.6	2.1	2.2	1.8	1.3	1.1	0.8	0.9	0.7
Cocoa	..	-	..	..	..	0.1	0.1	0.1	0.1	0.1	0.1
Chocolate	2.3	2.4	2.2	3.1	3.2	2.1	2.2	1.8	1.2	1.1	1.2
Tea and maté	0.5	0.7	0.8	0.8	0.8	1.0	1.0	0.8	0.9	1.1	0.7
Spices	0.2	0.2	0.2	0.2	0.1	0.2	0.1	0.3	0.2	0.1	0.1
Feeding-stuff for animals	8.4	8.2	9.7	15.5	17.9	20.5	18.9	17.2	15.2	13.9	15.0
Oil-seed cake	2.6	2.5	2.0	2.3	1.7	1.6	1.2	1.5	0.9	0.9	1.2
Meat and fish meal	2.4	2.7	3.3	3.4	3.2	1.9	2.2	2.8	1.9	2.3	2.0
Food wastes	7.3	5.7	5.5	5.3	5.0	4.4	3.6	3.4	1.8	1.6	1.8
Margarine and shortening	0.1	0.3	0.2	..	0.1	0.1	0.3	0.1	0.1	0.2	0.1
Food preparations	5.2	3.6	3.4	4.1	3.1	3.4	3.7	2.5	1.9	1.9	1.8
Non-alcoholic beverages	0.1	0.9	0.8	1.1	0.7	1.1	0.9	0.5	0.6	0.4	0.4
Alcoholic beverages	10.8	11.1	11.9	9.9	9.3	8.0	6.8	6.1	6.5	6.3	6.8
Hides and skins, undressed	2.1	2.6	2.6	2.4	2.1	2.6	2.9	2.3	2.7	2.8	2.7
Crude animal materials	5.8	6.1	5.5	5.5	5.5	4.8	4.7	5.1	4.3	[illegible]	2.6
Animal oils and fats	3.5	4.4	4.6	5.0	4.8	4.9	4.8	4.4	3.6	[illegible]	5.7
Fixed vegetable oils, soft	1.0	0.9	1.1	1.9	2.5	1.6	0.9	0.6	0.4	0.5	0.6
Other fixed vegetable oils	0.4	0.5	0.4	0.6	0.6	0.6	0.3	0.1	0.2	0.1	0.2

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1 For source and notes see Table 2.8.

TABLE 2.12

FOOD AND BEVERAGES: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE U.S.A.

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
			Total U.S.A. Imports		Imports from Canada	
	Total U.S.A. Imports	Imports from Canada	1967	1977	1967	1977
TOTAL, FOOD AND BEVERAGES	10.5	9.9	100.0	100.0	100.0	100.0
Meat, fresh, chilled or frozen	6.6	7.4	11.7	8.2	8.1	6.4
Meat, dried, salted or smoked	-10.0	- 9.0	0.2	..	1.0	0.1
Meat preparations	7.8	8.5	7.6	5.9	0.7	0.6
Milk and cream	-5.3	1.5	0.1	0.1	0.2	0.1
Butter	4.5	n.a.	..	..	..	..
Cheese and curd	12.8	21.4	2.0	2.4	0.1	0.4
Eggs	11.6	12.3	0.1	0.1	0.3	0.3
Fish, fresh and simply preserved	15.7	11.8	12.8	20.2	32.1	38.1
Fish preparations	9.5	13.0	3.0	2.7	2.2	2.9
Meal and flour of wheat	n.a.	n.a.	..	..	..	..
Meal and flour of cereals	-	-	-	-	-	-
Cereal preparations	14.1	13.5	0.8	1.1	3.2	4.4
Dried fruit	24.1	1.3	0.1	0.4	..	..
Fruit, preserved	15.0	9.5	2.1	3.1	1.1	1.1
Beans, peas, lentils, etc.	27.8	74.4	..	0.2	..	0.3
Vegetables, frozen	7.7	7.2	0.1	0.1	..	..
Vegetable products, roots and tubers	5.9	n.a.	0.3	0.2	-	..
Vegetables, preserved	10.2	22.8	3.1	3.0	0.1	0.4
Raw sugar	9.7	n.a.	2.4	2.2	-	0.3
Refined sugar	5.0	156.0	15.3	9.2	..	2.4
Molasses	8.0	-17.7	1.3	1.0	0.1	..
Sugars and syrups	9.9	9.4	0.2	0.2	1.6	1.5
Sugar confectionary	12.7	7.3	0.6	0.7	0.4	0.3
Cocoa	18.3	67.5	5.2	10.3	..	0.3
Chocolate	7.6	11.6	0.6	0.5	0.9	1.0
Tea and maté	11.7	12.8	1.8	2.0	0.7	0.9
Spices	11.7	21.1	1.4	1.5	..	..
Feeding-stuff for animals	13.1	10.6	0.2	0.2	1.2	1.3
Oil-seed cake	- 0.5	11.5	0.2	0.1	0.2	0.3
Meat and fish meal	- 9.0	2.8	2.4	0.3	1.8	0.9
Food wastes	11.9	8.7	0.2	0.2	1.6	1.5
Margarine and shortening	n.a.	-	-	..	-	-
Food preparations	7.4	- 2.3	1.0	0.7	1.4	0.4
Non-alcoholic beverages	32.3	38.4	..	0.1	..	..
Alcoholic beverages	9.3	7.9	15.9	14.3	35.0	29.0
Hides and skins, undressed	4.6	18.4	1.8	1.1	1.0	2.1
Crude animal materials	8.5	0.8	2.1	1.8	4.7	2.0
Animal oils and fats	0.6	15.5	0.3	0.1	0.2	0.4
Fixed vegetable oils, soft	5.8	38.1	0.6	0.4	..	0.1
Other fixed vegetable oils	19.1	n.a.	2.5	5.3	-	..

1 For source and notes see Table 2.8.

TABLE 2.13

FOOD AND BEVERAGES: CANADA'S SHARE OF IMPORTS BY THE UNITED STATES[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, FOOD & BEVERAGES	11.9	12.0	13.0	12.7	12.4	11.7	12.3	8.6	10.0	10.9	11.3
Meat, fresh, chilled or frozen	8.2	9.1	8.2	10.7	10.4	8.3	8.1	7.1	6.1	8.7	8.8
Meat, dried, salted or smoked	75.5	74.2	71.3	81.7	77.7	83.3	87.1	85.7	80.7	81.3	84.4
Meat preparations	1.2	0.9	1.1	1.2	1.2	1.3	1.5	1.1	1.2	1.0	1.2
Milk and cream	16.3	15.8	19.9	19.4	19.6	6.4	30.7	12.5	2.7	13.3	11.3
Butter	1.2	-	-	-	-	-	-	-	1.5	2.5	-
Cheese and curd	0.8	0.9	2.1	3.0	2.6	2.4	3.9	3.5	1.9	1.9	1.7
Eggs	54.1	28.8	25.3	38.7	50.8	76.5	80.7	89.2	76.7	43.2	57.4
Fish, fresh and simply preserved	30.0	29.1	28.6	27.2	25.9	22.2	23.0	18.6	22.7	21.7	21.4
Fish preparations	8.8	10.1	10.9	9.8	9.6	10.2	11.5	11.4	12.3	10.6	12.0
Meal and flour of wheat	-	53.0	57.7	61.9	51.0	45.8	60.8	80.9	59.7	12.1	17.3
Meal and flour of cereals	-	-	-	-	-	-	-	-	-	-	-
Cereal preparations	47.7	43.5	47.4	44.9	42.9	39.5	43.2	50.8	55.2	49.1	45.3
Dried fruit	0.3	0.1	-	0.8	0.1	0.3	0.8	0.2	0.2	0.3	..
Fruit, preserved	6.5	6.0	6.1	7.3	5.4	5.6	6.2	5.2	3.8	3.3	4.0
Beans, peas, lentils, etc.	0.6	4.6	4.6	7.9	13.8	7.4	12.2	12.9	12.0	13.7	13.8
Vegetables, frozen	0.2	..	-	0.1	0.1	0.7	0.2	0.1	0.4	0.4	0.2
Vegetable products, roots and tubers	-	0.3	0.7	0.7	2.0	0.4	0.7	0.3	0.6	0.3	1.5
Vegetables, preserved	0.5	0.5	1.2	2.2	2.4	1.9	1.7	1.6	2.2	1.3	1.4
Raw sugar	-	-	-	-	-	-	-	-	1.4	1.0	1.7
Refined sugar	..	..	-	-	-	-	-	-	0.7	0.9	2.9
Molasses	0.6	0.3	0.3	0.3	0.2	0.2	0.3	0.3	0.2	0.2	..
Sugars and syrups	97.7	97.8	89.9	89.1	91.9	95.5	94.1	88.5	79.5	94.4	92.8
Sugar confectionary	8.4	12.4	11.8	10.5	12.4	10.4	7.4	5.9	4.1	4.7	5.1
Cocoa	..	-	-	..	-	0.2	0.5	0.3	0.2	0.3	0.3
Chocolate	16.8	15.0	18.2	22.8	28.3	22.7	26.6	20.8	17.9	17.6	24.3
Tea and maté	4.5	5.4	5.8	7.0	5.1	7.3	6.7	5.6	6.1	6.9	4.9
Spices	0.1	..	..	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.2
Feeding-stuff for animals	89.7	95.7	98.3	94.7	94.9	94.5	93.7	89.9	83.4	81.1	71.1
Oil-seed cake	16.3	15.4	31.1	64.4	93.4	75.6	82.3	96.9	74.9	19.6	50.9
Meat and fish meal	8.9	10.1	21.1	26.8	20.6	8.2	31.3	35.0	27.5	23.8	30.3
Food wastes	91.2	85.6	85.3	81.7	73.7	74.6	68.2	68.4	67.1	63.4	68.1
Margarine and shortening	-	-	-	-	91.2	92.9	33.3	83.0	66.7	-	-
Food preparations	16.5	11.0	5.7	9.0	6.4	9.1	11.0	9.0	6.9	6.8	6.4
Non-alcoholic beverages	2.7	24.7	28.5	22.3	8.9	17.1	16.0	13.5	8.9	[illegible]	4.1
Alcoholic beverages	26.2	25.1	28.2	24.8	24.1	24.1	23.3	20.0	23.5	20.7	23.1
Hides and skins, undressed	6.5	7.1	8.5	9.8	6.6	10.3	20.5	16.0	20.6	24.9	22.3
Crude animal materials	26.0	27.0	27.3	29.0	30.0	23.1	27.7	28.7	23.9	16.9	12.5
Animal oils and fats	10.5	9.1	14.7	8.7	9.5	21.8	15.9	47.7	29.5	48.1	42.0
Fixed vegetable oils, soft	0.3	0.5	0.3	0.2	0.5	0.6	1.1	2.7	1.6	2.9	3.6
Other fixed vegetable oils	-	..	0.1	..	0.1	..	0.1	..	..	..	..

1 For source and notes see Table 2.8.

TABLE 2.14

FOOD AND BEVERAGES: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE E.E.C.[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
			Total E.E.C. Imports		Imports from Canada	
	Total E.E.C. Imports	Imports from Canada	1967	1977	1967	1977
TOTAL, FOOD AND BEVERAGES	10.6	9.8	100.0	100.0	100.0	100.0
Meat, fresh, chilled or frozen	6.4	14.6	13.6	9.2	5.1	7.8
Meat, dried, salted or smoked	- 7.7	-26.4	1.0	0.2	0.2	..
Meat preparations	6.1	3.7	2.9	1.9	0.2	0.1
Milk and cream	-22.9	-30.5	0.6	..	2.7	..
Butter	- 3.7	-	4.3	1.1	-	-
Cheese and curd	5.2	-20.8	2.4	1.5	7.1	0.3
Eggs	- 0.6	38.7	0.5	0.2	0.1	1.4
Fish, fresh and simply preserved	16.6	19.9	3.5	5.9	11.3	27.3
Fish preparations	8.7	8.7	3.7	3.1	17.3	15.7
Meal and flour of wheat	- 9.8	-56.2	0.2	..	5.0	..
Meal and flour of cereals	- 6.7	-16.4	..	..	..	..
Cereal preparations	14.0	9.5	0.4	0.5	0.9	0.9
Dried fruit	11.7	24.6	1.8	2.0	..	..
Fruit, preserved	10.3	- 1.9	5.5	5.3	3.6	1.2
Beans, peas, lentils, etc.	10.5	14.2	1.5	1.5	4.8	7.1
Vegetables, frozen	13.8	4.8	0.4	0.6	3.8	2.4
Vegetable products, roots and tubers	21.5	9.3	1.2	3.1	..	..
Vegetables, preserved	15.8	2.9	2.3	3.7	4.7	2.4
Raw sugar	7.1	n.a.	5.5	4.0	..	-
Refined sugar	4.8	- 6.7	0.2	0.1	..	..
Molasses	16.1	-	0.6	1.0	-	-
Sugars and syrups	8.1	11.3	..	..	0.2	0.2
Sugar confectionary	16.2	- 9.2	0.1	0.2	0.2	..
Cocoa	19.3	-13.0	5.2	11.1	0.1	..
Chocolate	11.8	4.9	0.3	0.3	0.2	0.1
Tea and maté	7.8	12.5	5.7	4.4	..	..
Spices	14.7	4.5	0.7	1.0	0.1	0.1
Feeding-stuff for animals	15.1	30.7	1.2	1.7	1.2	7.0
Oil-seed cake	13.8	4.4	9.1	12.0	12.0	7.2
Meat and fish meal	3.1	7.4	3.2	1.6	1.2	0.9
Food wastes	19.5	- 1.8	1.0	2.1	3.7	1.2
Margarine and shortening	6.3	7.8	0.4	0.3	..	..
Food preparations	17.7	12.2	0.4	0.7	2.1	2.6
Non-alcoholic beverages	26.1	n.a.	..	..	-	0.1
Alcoholic beverages	8.6	17.1	3.7	3.1	0.5	0.9
Hides and skins, undressed	8.6	11.1	4.7	3.9	2.9	3.2
Crude animal materials	10.4	7.2	2.7	2.7	1.8	1.4
Animal oils and fats	11.5	17.1	2.3	2.4	3.8	7.3
Fixed vegetable oils, soft	8.8	- 7.7	4.3	3.7	2.5	0.4
Other fixed vegetable oils	14.3	7.0	2.8	4.0	0.8	0.6

1 For source and notes see Table 2.8.

TABLE 2.15

FOOD AND BEVERAGES: CANADA'S SHARE OF IMPORTS BY THE E.E.C. (EXCLUDING INTRA-TRADE)[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, FOOD & BEVERAGES	2.6	2.6	2.5	2.4	2.6	2.5	2.5	2.2	2.0	2.5	2.4
Meat, fresh, chilled or frozen	1.0	1.2	0.8	1.0	1.1	0.9	1.4	2.0	2.2	2.1	2.0
Meat, dried, salted or smoked	0.5	0.5	0.2	0.4	0.3	0.2	..	0.1	..	0.2	0.1
Meat preparations	0.2	0.2	0.1	0.2	0.1	0.1	0.2	0.3	0.2	0.1	0.2
Milk and cream	11.1	12.6	12.1	7.1	5.2	1.8	1.0	0.1	..	3.6	3.9
Butter	-	-	-	-	1.4	0.3	-	-	-	..	-
Cheese and curd	7.5	10.9	7.9	7.0	9.2	6.0	0.9	0.3	0.6	0.6	0.4
Eggs	0.7	0.8	1.9	1.6	1.2	2.4	4.5	5.2	14.5	20.7	19.8
Fish, fresh and simply preserved	8.5	8.5	8.5	8.2	7.8	8.3	7.8	7.4	8.7	8.3	11.1
Fish preparations	12.2	10.5	13.6	7.0	10.3	10.5	15.8	10.7	7.9	8.4	12.3
Meal and flour of wheat	68.2	73.9	66.7	67.2	65.7	75.3	39.3	21.4	9.8	2.1	0.1
Meal and flour of cereals	3.4	3.1	2.8	14.0	2.0	1.2	0.3	0.4	-	0.3	1.1
Cereal preparations	6.5	1.9	4.7	10.0	8.4	7.2	4.8	8.2	6.0	4.1	4.4
Dried fruit	..	..	..	..	0.2	-	0.1	..	..	..	0.1
Fruit, preserved	1.7	1.2	0.6	0.4	0.4	0.4	0.5	1.0	0.9	0.9	0.5
Beans, peas, lentils, etc.	8.4	3.9	7.2	7.3	9.9	14.3	12.7	11.9	13.3	16.0	11.7
Vegetables, frozen	23.5	23.6	16.0	10.7	3.4	3.2	2.6	2.5	8.4	19.8	10.3
Vegetable products, roots and tubers	0.1	0.3	0.2	..	0.1	0.1	0.1	..	0.1	..	..
Vegetables, preserved	5.2	5.0	6.0	4.8	2.9	2.3	1.8	1.1	1.0	2.4	1.6
Raw sugar	..	..	-	-	-	-	-	-	-	-	-
Refined sugar	0.1	..	..	-	..	..	4.1	..	3.1	..	..
Molasses	-	-	-	-	-	..	-	-	..	-	-
Sugars and syrups	13.7	9.6	11.3	13.6	24.2	27.6	18.2	17.9	11.6	15.4	18.3
Sugar confectionary	3.2	4.6	3.8	2.9	2.3	0.5	0.7	0.7	0.4	0.3	0.3
Cocoa	..	-	..	..	..	..	..	0.1	..	..	..
Chocolate	1.5	1.0	1.0	0.8	0.9	1.0	1.3	4.3	2.9	1.1	0.8
Tea and maté	..	..	..	-	-	..	..	..	-	..	..
Spices	0.4	0.5	0.5	0.4	0.3	0.4	0.2	0.6	0.4	0.2	0.2
Feeding-stuff for animals	2.7	2.6	2.8	4.0	5.2	12.0	13.2	9.7	10.4	9.8	9.8
Oil-seed cake	3.4	3.4	2.7	3.1	2.2	2.1	1.8	2.2	1.3	1.3	1.5
Meat and fish meal	0.9	0.9	1.6	1.2	1.8	1.7	2.3	2.8	0.2	1.7	1.4
Food wastes	9.9	6.9	6.2	4.4	6.6	4.8	4.4	5.9	0.8	0.9	1.4
Margarine and shortening	0.1	1.1	0.8	-	-	..	1.3	0.1	0.2	0.5	0.1
Food preparations	14.5	16.4	16.5	19.7	15.3	16.9	19.3	13.3	11.2	9.6	9.0
Non-alcoholic beverages	-	0.3	-	6.9	10.2	18.3	10.9	2.9	9.8	6.6	4.9
Alcoholic beverages	0.3	0.5	0.4	0.3	0.9	0.7	0.6	0.6	0.7	0.7	0.7
Hides and skins, undressed	1.6	2.4	2.3	1.9	2.1	2.4	1.9	1.0	1.5	2.3	2.0
Crude animal materials	1.7	1.8	2.2	1.8	1.2	1.0	1.3	0.9	0.9	1.7	1.3
Animal oils and fats	4.4	6.7	6.8	6.6	5.4	6.3	5.5	6.0	3.5	7.1	7.2
Fixed vegetable oils, soft	1.5	1.1	1.6	2.9	4.3	3.0	0.8	0.6	0.7	0.1	0.3
Other fixed vegetable oils	0.7	1.0	0.8	1.1	1.2	1.3	0.7	0.2	0.5	0.4	0.4

1 For source and notes see Table 2.8.

CHAPTER III
TRADE IN WOOD PRODUCTS

3.1 CHARACTERISTICS OF THE DOMESTIC INDUSTRIES

The wood industries group embraces a large proportion of the Canadian forest product industries. It includes sawmills and planing mills, veneer and plywood mills, as well as producers of sash, doors, coffins and caskets, wooden boxes and miscellaneous wooden products[1]. In 1978, sawmills and planing mills accounted for more than half of this group's factory shipments and were followed by sash, door and other millwork products accounting for close to another 20 percent.

This industry group shows a very low degree of concentration. In 1974, the weighted average of the leading four enterprises accounted for only 27 percent of value added[2]. Sawmills and planing mills, sash, door and other millwork have substantially lower concentration even than this as measured by value of shipments, value added or employment. The only exception to generally low concentration in this sector is in the wood preservation industry. For the group as a whole, only 5.1 percent of establishments, controlling about 26 percent of factory shipments, were foreign owned in 1974[3]. The foreign owned establishments employed slightly more than 20 percent of total employees in this industry group.

Table 3.1 provides a selection of major economic indicators for the years 1967 and 1978 to illustrate the group's importance relative to overall manufacturing.

Shipments of $8.1 billion in 1978 represented over 6 percent of manufacturing shipments. Clearly, the wood product share of manufacturing exports compared to the other measures in Table 3.1 shows the importance of exporting to this industry group, and the importance of wood product exports to manufacturing as a whole. In contrast wood product imports are relatively small and their growth roughly matched the increase in shipments.

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1 1970 SIC codes 251 to 259

2 See corresponding note on page 23.

3 See corresponding note on page 23.

TABLE 3.1

WOOD INDUSTRIES

SELECTED INDICATORS

	1967	1978	Average Annual Rate of Growth 1967-1978	1978 Share of Total Manufacturing Activity
			(percent)	
REAL DOMESTIC PRODUCT (Constant $, millions)	692.3	1,222.6	5.3	4.8
SHIPMENTS ($ millions)	1,676	8,126	15.4	6.2
DOMESTIC EXPORTS ($ millions)	655	3,995	17.9	10.3
IMPORTS LESS RE-EXPORTS ($ millions)	89	438	15.6	1.1
EMPLOYMENT (000's)	76	98	2.3	6.1
PROFITS ($ millions)	140	1,049	20.1	8.0
INVESTMENT ($ millions)	128.5	535.9	13.9	5.6

Source: See Table 2.1.

3.2 TRADE DEVELOPMENTS, 1967 to 1978

The wood industries group is a strong participant in external trade, ranking fourth in domestic exports in 1978 with a value close to $4.0 billion. From 1967 to 1978, domestic exports of wood products rose at an average annual rate of 17.9 percent versus 15.2 percent for total manufacturing exports, and contributed significantly to the overall export orientation of Canadian manufacturing. The group's export orientation rose steadily throughout the period except for a sharp drop in 1974 and 1975 (see Table 3.2 and Chart 3.1). This latter resulted from a prolonged output disruption due to strikes and generally low demand in Canada's major markets in the United States and Japan.

CHART 3.1

WOOD INDUSTRIES: SELECTED TRADE MEASURES

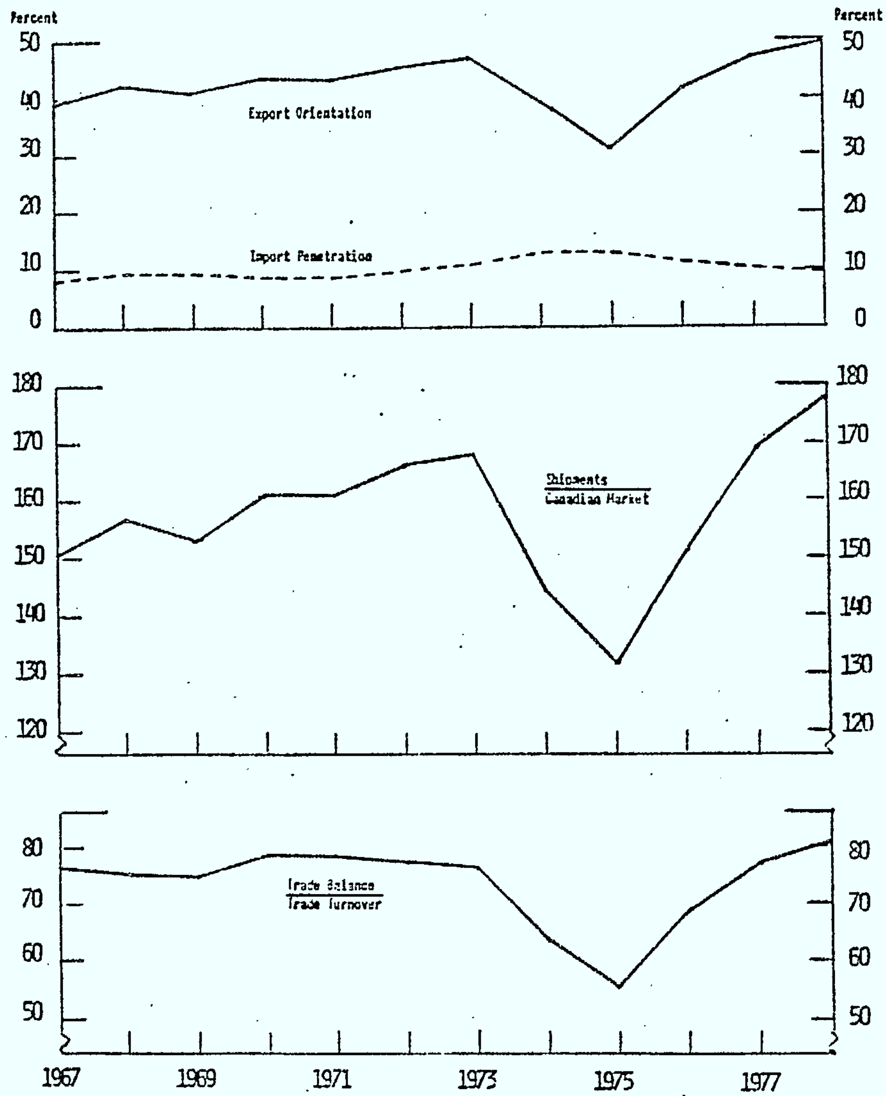

TABLE 3.2

WOOD INDUSTRIES: TRADE MEASURES, 1967 TO 1978

YEAR	DOMESTIC EXPORTS	ADJUSTED IMPORTS[1]	TRADE BALANCE	TRADE TURNOVER (EXPORTS + IMPORTS)	CANADIAN FACTORY SHIPMENTS	CANADIAN MARKET[2]	TRADE BALANCE / TRADE TURNOVER	SHIPMENTS / CANADIAN MARKET	EXPORT ORIENTATION	IMPORT PENETRATION
	(MILLIONS OF DOLLARS)						(PERCENT)			
1967	655	89	566	744	1,676	1,110	76.1	151.0	39.1	8.0
1968	833	116	716	949	1,966	1,250	75.5	157.3	42.3	9.3
1969	879	127	752	1,006	2,150	1,397	74.8	153.8	40.9	9.1
1970	839	102	738	941	1,951	1,214	78.4	160.8	43.0	8.4
1971	1,015	124	891	1,139	2,347	1,456	78.2	161.2	43.2	8.5
1972	1,410	181	1,228	1,591	3,085	1,856	77.2	166.2	45.7	9.8
1973	1,901	258	1,643	2,159	4,056	2,413	76.1	168.1	46.9	10.7
1974	1,577	354	1,223	1,930	3,991	2,768	63.4	144.2	39.5	12.8
1975	1,261	361	899	1,622	3,803	2,903	55.4	131.0	33.2	12.4
1976	2,075	389	1,686	2,463	4,999	3,313	68.4	150.9	41.5	11.7
1977	2,962	385	2,577	3,346	6,298	3,721	77.0	169.3	47.0	10.3
1978	3,995	438	3,557	4,434	8,126	4,569	80.2	177.9	49.2	9.6

[1]Total imports less re-exports; [2]Shipments plus imports less exports.

TABLE 3.3

WOOD INDUSTRIES: EXPORTS AND EXPORT ORIENTATION BY INDUSTRY, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
	(MILLIONS OF DOLLARS)											
DOMESTIC EXPORTS												
TOTAL	655	833	879	839	1,015	1,410	1,901	1,577	1,261	2,075	2,962	3,995
PLANING, SHINGLE & SAW MILLS	551	718	763	718	899	1,260	1,705	1,370	1,062	1,781	2,571	3,476
VENEER & PLYWOOD MILLS	78	86	80	73	71	97	127	106	91	101	148	212
SASH, DOOR & MILLWORK PLANTS	17	19	24	32	25	30	35	59	74	144	162	197
SASH, DOOR & MILLWORK PLANTS, N.E.S.	1	2	2	3	5	7	7	6	4	22	39	63
HARDWOOD FLOORING PLANTS	4	4	4	5	3	3	4	5	2	2	3	5
WOODEN BOX FACTORIES	2	1	2	2	2	2	2	2	2	2	3	4
COFFIN & CASKET IND.	0	0	0	0	0	0	0	0	0	0	0	0
MISC. WOOD IND.	7	8	11	14	17	21	32	39	32	46	78	108
EXPORT ORIENTATION	(PERCENT)											
TOTAL	39.1	42.3	40.9	43.0	43.2	45.7	46.9	39.5	33.2	41.5	47.0	49.2
PLANING, SHINGLE & SAW MILLS	55.8	58.7	58.3	61.5	62.5	64.6	64.9	57.6	51.6	60.0	64.8	66.0
VENEER & PLYWOOD MILLS	30.5	29.7	26.3	27.8	22.8	24.6	26.1	22.9	19.8	17.3	21.2	24.0
SASH, DOOR & MILLWORK PLANTS	6.2	6.4	6.7	9.4	6.3	5.9	5.3	7.4	8.0	13.4	13.4	14.1
SASH, DOOR & MILLWORK PLANTS, N.E.S.	0.6	0.8	0.8	1.1	2.0	2.5	1.9	1.5	0.9	3.8	6.5	9.3
HARDWOOD FLOORING PLANTS	17.8	16.5	17.8	24.4	14.8	12.0	16.5	24.9	18.5	0.0	20.3	21.2
WOODEN BOX FACTORIES	3.5	3.1	3.0	3.6	3.5	3.0	2.5	2.4	1.6	2.1	2.3	2.4
COFFIN & CASKET IND.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
MISC. WOOD IND.	7.6	8.4	9.8	12.5	13.7	13.9	17.5	18.0	14.4	19.4	28.1	26.6

TABLE 3.4

WOOD INDUSTRIES: SHIPMENTS AND IMPLICIT SELF-SUFFICIENCY[1] BY INDUSTRY, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
						(MILLIONS OF DOLLARS)						
FACTORY SHIPMENTS												
TOTAL	1,676	1,966	2,150	1,951	2,347	3,085	4,056	3,991	3,803	4,999	6,298	8,126
PLANING, SHINGLE & SAW MILLS	988	1,223	1,310	1,168	1,440	1,949	2,627	2,380	2,060	2,969	3,965	5,269
VENEER & PLYWOOD MILLS	256	289	305	262	312	393	487	463	458	584	698	882
SASH, DOOR & MILLWORK PLANTS	278	292	353	339	396	509	658	801	928	1,073	1,208	1,392
SASH, DOOR & MILLWORK PLANTS, N.E.S.	255	270	330	224	267	291	362	404	471	567	598	678
HARDWOOD FLOORING PLANTS	23	22	23	20	20	27	25	21	13	0	15	25
WOODEN BOX FACTORIES	46	47	57	54	55	62	79	105	110	111	123	150
COFFIN & CASKET IND.	15	16	17	17	18	18	21	25	25	23	26	28
MISC. WOOD IND.	94	99	107	112	126	153	184	217	222	239	278	405
SHIPMENTS/CANADIAN MARKET						(PERCENT)						
TOTAL	151.0	157.3	153.8	160.8	161.2	166.2	168.1	144.2	131.0	150.9	169.3	177.9
PLANING, SHINGLE & SAW MILLS	207.2	222.0	218.0	236.9	243.4	255.3	254.7	207.7	181.7	217.8	251.7	262.3
VENEER & PLYWOOD MILLS	125.0	123.3	112.8	118.3	112.3	110.4	111.3	98.5	93.3	100.8	112.2	118.3
SASH, DOOR & MILLWORK PLANTS	103.5	98.1	103.8	107.5	103.7	102.7	101.7	102.9	103.7	109.4	109.0	110.3
SASH, DOOR & MILLWORK PLANTS, N.E.S.	99.2	99.2	98.9	98.9	99.3	98.9	97.3	95.7	95.6	96.9	99.0	102.5
HARDWOOD FLOORING PLANTS	111.6	109.2	113.5	126.3	113.7	111.5	114.8	116.5	98.8	0.0	98.3	98.5
WOODEN BOX FACTORIES	97.8	97.3	98.8	103.2	103.1	101.4	99.8	100.1	99.4	99.7	100.4	99.2
COFFIN & CASKET IND.	98.2	98.3	98.1	97.6	97.3	97.2	94.9	93.0	90.4	84.6	82.9	82.5
MISC. WOOD IND.	95.7	96.8	96.9	97.7	94.8	95.1	94.2	89.7	90.1	95.1	106.1	110.3

1 Ratio of shipments to Canadian market

The individual industries making up the wood industries group show a marked propensity to export. Except for the very small sub-sector of coffin and casket manufacturers, the entire group of industries is very strongly export oriented (Table 3.3). Saw mills, traditionally exporting close to two-thirds of their production of softwood and hardwood lumber, led other industries where export orientation ranged from a tenth to a quarter of factory shipments. Shipments, therefore, exceeded the Canadian market (Table 3.4) while imports were usually small proportions of the Canadian market (Table 3.5).

The export performance within the group has been strongly supported by the smaller but higher value added industries of sash, door and millwork plants and miscellaneous wood industries. Their rates of growth of the order of 24-28 percent per annum were significantly above the average for the group as a whole and for saw and planing mills. Veneer and plywood mills and wooden box factories grew consideralby slower than the average, at 7-9 percent per annum. Both experienced severe competition from developing countries supplying hardwood from warm, semi-tropical and tropical forests. These have made inroads into the large market for veneer and plywood products, especially for lower grade panelling.

Table 3.5 traces the detail of wood product imports. Generally, imports of wood products are quite low and for many commodity groups the import penetration was less than 10 percent for most of the period 1967-78. In the 1973 to 1977 period, the Canadian demand for imports increased and led to moderately higher import penetration. The peak for the group of 12.8 percent occurred in 1974, and since then import penetration has declined mainly due to decreased imports of veneer and plywood and stabilized imports of miscellaneous wood products.

Although the growth rates of imports were generally lower than for exports between 1967 and 1978, the sub-sectors showing above average growth for exports also experienced higher growth for imports. The imports of lumber and their measure of import penetration have not grown much faster than the Canadian market. In contrast, this measure has increased very rapidly for hardwood flooring, after a gradual decline between 1967 and 1973, and coffins and caskets. Imports of these items are, however, quite small.

TABLE 3.5

WOOD INDUSTRIES: IMPORTS AND IMPORT PENETRATION BY INDUSTRY, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
						(MILLIONS OF DOLLARS)						
ADJUSTED IMPORTS												
TOTAL	89	116	127	102	124	181	258	354	361	389	385	438
PLANING, SHINGLE & SAW MILLS	40	46	54	44	51	74	109	136	136	175	181	216
VENEER & PLYWOOD MILLS	27	31	46	32	37	60	77	113	123	96	72	75
SASH, DOOR & MILLWORK PLANTS	8	24	11	8	11	17	24	36	41	52	62	67
SASH, DOOR & MILLWORK PLANTS, N.E.S.	3	4	6	5	7	10	17	24	26	40	45	46
HARDWOOD FLOORING PLANTS	2	2	1	1	1	0	1	2	3	2	3	6
WOODEN BOX FACTORIES	3	3	2	0	0	1	2	2	2	3	2	5
COFFIN & CASKET IND.	0	0	0	0	0	1	1	2	3	4	5	6
MISC. WOOD IND.	11	11	14	17	24	29	44	64	56	59	62	70
IMPORT PENETRATION						(PERCENT)						
TOTAL	8.0	9.3	9.1	8.4	8.5	9.8	10.7	12.8	12.4	11.7	10.3	9.6
PLANING, SHINGLE & SAW MILLS	8.4	8.4	9.0	8.8	8.6	9.7	10.6	11.8	12.0	12.8	11.5	10.7
VENEER & PLYWOOD MILLS	13.1	13.4	16.9	14.6	13.3	16.8	17.7	24.1	25.1	16.6	11.6	10.1
SASH, DOOR & MILLWORK PLANTS	2.9	8.2	3.1	2.6	2.9	3.3	3.7	4.7	4.6	5.3	5.6	5.3
SASH, DOOR & MILLWORK PLANTS, N.E.S.	1.3	1.6	1.9	2.2	2.0	3.6	4.5	5.7	5.3	6.8	7.5	7.0
HARDWOOD FLOORING PLANTS	8.3	8.8	6.7	4.5	3.1	1.8	4.2	12.4	19.4	810.1	21.6	22.4
WOODEN BOX FACTORIES	5.7	5.7	4.1	0.5	0.5	1.6	2.7	2.3	2.1	2.3	1.8	3.2
COFFIN & CASKET IND.	1.8	1.7	1.9	2.4	2.7	2.8	5.1	7.0	9.6	15.4	17.1	17.5
MISC. WOOD IND.	11.6	11.3	12.6	14.5	18.2	18.1	22.3	26.5	22.8	23.3	23.7	19.0

3.3 CANADA'S SHARE OF OECD IMPORTS, 1967-1977

Throughout the time period under review, Canada maintained its position as the leading supplier of wood products to the OECD. In 1977 the OECD imported $12 billion U.S. of wood products, of which Canada supplied $2.8 billion U.S. or 23.5 percent (Table 3.6).

Following Canada as leading suppliers are the United States, Sweden, Finland, and the U.S.S.R. The U.S. expanded its market share throughout most of the period. In 1967 it was the fifth largest supplier with 7.3 percent of the market share and by 1976 it was the second largest with 11.2 percent, a 53 percent increase. In 1977, it maintained the second ranking position, however, its share decreased to 9.0 percent.

The market shares of both Sweden and Finland were maintained throughout most of the period although they declined significantly in recent years. The U.S.S.R. market share declined from 7.4 percent in 1967 to a low of 4.0 percent in 1974 after which it recovered, ending the period at 5.2 percent. The largest gain was made by the other developing market economies. Led by Malaysia and Taiwan these countries as a group increased their market share from 12.1 percent to 17.7 percent, an increase of 46.3 percent.

Canada's share varied considerably over the eleven years. During the period from 1967 to 1972 its share varied but remained within the same range (21.3 to 25.2 percent). Over the next three years Canada's share declined reaching its lowest point of 16.2 percent during the recessionary year of 1975. In 1976 and 1977 the market share recovered, ending the period as a whole slightly above its initial value. This variance can largely be accounted for by three factors. The wood industry is dependent upon the highly cyclical construction industry and, as a result year-to-year changes in the value of imports can be expected. This cyclical nature is exacerbated by Canda's dependence upon the U.S. market and periodic disruptions in Canadian production (strikes). In 1977, 80 percent of Canada's OECD exports of wood products was destined to the U.S. market (Table 3.7). During the 1973 to 1975 period this market grew more slowly than the OECD as a whole, however, during the next two years its growth exceeded the overall growth. Canada's market share reflects these shifts. The decline and recovery of Canada's share in both the EEC and Japan, while of lesser importance, are also reflected in the data (Tables 3.8 and 3.9).

Canada's high market share is based upon its dominance of trade in wood, shaped or simply worked, particularly in the U.S. market. These commodities represented 85.8 percent of Canada's export of wood products in 1977 (Table 3.10). Imports from Canada of these commodities have been growing more quickly than the total OECD imports. OECD imports of the other commodities are dominated by the U.S. and Canada's share has been in decline.

TABLE 3.6

WOOD PRODUCTS: OECD IMPORTS BY SOURCE[1]

DISTRIBUTION AND AVERAGE ANNUAL RATE OF CHANGE

	DISTRIBUTION percent											Percent Change
	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1967-1977
Total Imports	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	
Developed Market Economies												
Canada	23.4	25.1	23.1	21.3	23.4	25.2	22.1	17.9	16.2	19.7	23.5	..
United State	7.3	7.6	7.9	8.3	7.1	8.0	8.6	10.4	12.5	11.2	9.0	2.1
Sweden	10.7	10.3	10.3	10.5	11.0	10.3	10.4	11.6	10.7	9.6	8.7	- 2.0
Finland	8.9	8.3	8.8	9.1	8.8	7.6	7.0	8.2	6.5	6.3	6.3	- 3.4
West Germany	3.3	3.3	3.2	3.3	3.1	2.9	3.3	4.5	4.7	4.4	4.3	2.7
Austria	3.8	3.6	4.2	4.7	4.3	3.8	4.1	4.3	4.1	3.8	4.1	0.8
France	2.1	1.9	1.8	2.3	2.8	3.0	3.1	2.9	3.5	3.0	3.3	4.6
Japan	3.8	4.1	3.9	3.0	2.9	2.5	1.5	1.2	1.1	1.2	1.2	-10.6
Total EEC (9)	11.1	10.7	10.8	11.6	11.9	12.0	11.8	13.2	15.4	13.7	13.9	2.3
Other Developed Market Economies	5.8	5.2	5.0	5.2	5.5	5.5	6.5	7.1	7.0	6.8	6.9	2.5
OPEC	0.4	0.3	0.4	0.3	0.3	0.3	0.4	0.4	0.6	0.7	0.6	4.1
Other Developing Market Economies	12.3	14.0	15.6	15.7	12.9	16.7	20.1	17.2	17.3	19.0	18.1	3.9
Malaysia	1.7	2.1	2.4	2.6	2.5	2.7	3.7	2.8	2.9	3.9	3.4	7.2
Taiwan	1.5	1.9	2.2	2.6	..	2.7	3.7	3.2	3.1	3.3	3.1	7.5
Centrally Planned Economies	12.7	10.8	10.0	10.2	12.0	8.0	7.3	8.5	8.6	8.1	7.8	- 4.8
U.S.S.R.	7.4	6.4	5.9	5.5	4.8	4.3	4.0	5.2	5.0	5.2	4.9	- 4.0
ADDENDUM												
Total Imports in Millions U.S. Dollars	2,899	3,405	3,802	4,020	4,460	5,834	9,247	9,613	7,587	10,297	12,069	

TABLE 3.7

WOOD PRODUCTS: PERCENTAGE OF CANADA'S EXPORTS BY DESTINATION[2]

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	OECD Share 1977
O.E.C.D.	96.8	97.6	97.5	96.6	97.3	98.1	98.2	95.5	93.5	93.5	95.1	100.0
United States	68.0	75.0	77.5	68.2	80.1	83.9	78.3	69.5	73.0	70.8	76.3	80.2
Japan	5.9	5.7	4.5	8.2	4.2	4.1	6.2	7.1	7.1	7.0	6.2	6.5
E.E.C. (9)	20.4	14.7	13.3	17.5	11.1	8.6	11.6	16.2	11.8	13.5	10.9	11.5
United Kingdom	15.7	10.3	8.3	12.0	7.0	5.8	8.2	11.7	7.5	7.3	5.7	6.0
Rest of World	3.2	2.4	2.5	3.4	2.7	1.9	1.8	4.5	6.5	6.5	4.9	

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1 For source and notes see Table 2.6.

2 For source and notes see Table 2.7.

TABLE 3.8

WOOD PRODUCTS: GROWTH OF FOREIGN IMPORTS[1]

(percent)

	OECD	U.S.A.	JAPAN	EEC (9)*	OTHER OECD	DEVELOPING COUNTRIES**
1967	-	-	-	-	-	-
1968	17.5	40.9	39.6	6.9	10.9	8.6
1969	11.7	11.9	7.0	10.4	15.3	6.5
1970	5.7	-16.5	52.0	11.6	12.3	12.4
1971	10.9	35.5	-17.1	3.0	12.2	3.3
1972	30.8	45.6	52.8	19.8	28.5	-4.8
1973	58.5	26.1	139.5	71.4	56.4	40.6
1974	4.0	-23.3	13.3	6.9	24.6	94.8
1975	-21.1	-21.5	-18.5	-26.2	-13.2	3.7
1976	35.7	58.0	17.1	41.1	21.2	50.5
1977	17.2	37.3	8.6	11.3	13.9	34.7

TABLE 3.9

WOOD PRODUCTS: CANADA'S TRADE SHARE BY MARKET[1]

(percent)

1967	23.4	61.8	37.2	12.5	2.9	5.1
1968	25.1	62.6	33.7	10.1	3.2	4.7
1969	23.1	60.5	26.6	8.1	2.8	4.4
1970	21.3	58.9	29.4	10.6	2.8	6.7
1971	23.4	65.2	22.3	7.8	2.1	8.2
1972	25.2	67.8	16.2	6.7	1.9	5.1
1973	22.1	68.6	15.8	7.2	2.2	4.9
1974	17.9	63.1	14.5	9.3	2.5	9.0
1975	16.2	64.5	14.7	6.0	1.2	6.4
1976	19.7	67.9	17.8	7.5	1.7	3.3
1977	23.5	71.4	20.9	8.4	1.8	3.5

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1 For source and notes see Table 2.8.

TABLE 3.10

WOOD PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE OECD[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
	Total OECD Imports	Imports from Canada	Total OECD Imports 1967	Total OECD Imports 1977	Imports from Canada 1967	Imports from Canada 1977
TOTAL, WOOD PRODUCTS	15.3	15.4	100.0	100.0	100.0	100.0
Wood, shaped, or simply worked	14.4	16.1	65.1	60.2	80.8	85.8
Cork, raw and waste	2.1	20.8	0.9	0.3	..	..
Veneers, plywood boards, etc.	16.6	10.1	23.6	26.2	13.4	8.4
Wood manufactures, n.e.s.	18.9	15.3	8.8	11.9	5.7	5.7
Cork manufactures	13.8	20.6	1.7	1.5	..	..

TABLE 3.11

WOOD PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE OECD[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, WOOD PRODUCTS	23.4	25.1	23.1	21.3	23.4	25.2	22.2	17.9	16.2	19.7	23.5
Wood, shaped, or simply worked	29.1	32.2	30.6	28.4	31.8	35.8	31.3	24.8	24.0	28.4	33.5
Cork, raw and waste	..	..	0.1	..	..	..	..	0.1	..	0.3	0.2
Veneers, plywood boards, etc.	13.3	11.2	8.7	8.8	8.8	7.9	6.9	6.2	5.4	5.5	7.5
Wood manufactures, n.e.s.	15.4	18.8	17.1	13.2	14.3	13.7	11.5	9.7	9.9	11.3	11.3
Cork manufactures	0.2	0.2	0.3	0.3	0.6	0.4	0.3	0.3	0.3	0.4	0.4

TABLE 3.12

WOOD PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE U.S.A.[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
	Total U.S.A. Imports	Imports from Canada	Total U.S.A. Imports 1967	Total U.S.A. Imports 1977	Imports from Canada 1967	Imports from Canada 1977
TOTAL, WOOD PRODUCTS	15.7	17.3	100.0	100.0	100.0	100.0
Wood, shaped, or simply worked	17.4	17.9	56.0	65.1	82.2	86.4
Cork, raw and waste	2.0	20.8	0.6	0.2	..	..
Veneers, plywood boards, etc.	12.3	12.2	30.0	22.3	9.8	6.3
Wood manufactures, n.e.s.	14.7	16.3	12.8	11.8	7.9	7.2
Cork manufactures	15.6	22.0	0.6	0.6	..	..

1 For source and notes see Table 2.8.

TABLE 3.13

WOOD PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE UNITED STATES[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, WOOD PRODUCTS	61.8	62.6	60.5	58.9	65.2	67.8	68.6	63.1	64.5	67.9	71.4
Wood, shaped, or simply worked	90.8	93.2	91.9	92.0	94.3	94.4	93.1	89.5	92.7	94.2	94.7
Cork, raw and waste	0.2	0.2	0.3	0.3	0.2	0.2	..	0.1	0.1	0.3	1.0
Veneers, plywood boards, etc.	20.3	15.0	11.5	12.4	13.6	13.4	14.2	15.7	17.0	17.1	20.2
Wood manufactures, n.e.s.	32.2	42.2	39.1	34.9	42.1	41.3	41.3	37.6	44.4	43.1	43.7
Cork manufactures	2.1	1.9	2.4	3.1	6.8	3.7	2.6	3.5	3.4	3.8	3.6

TABLE 3.14

WOOD PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE E.E.C.[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
	Total E.E.C. Imports	Imports from Canada	Total E.E.C. Imports		Imports from Canada	
			1967	1977	1967	1977
TOTAL, WOOD PRODUCTS	13.2	8.8	100.0	100.0	100.0	100.0
Wood, shaped, or simply worked	12.4	9.6	78.5	73.3	72.4	77.5
Cork, raw and waste	2.3	-	0.9	0.3	-	-
Veneers, plywood boards, etc.	15.9	6.8	14.4	18.2	25.5	21.1
Wood manufactures, n.e.s.	16.5	4.7	4.5	5.9	2.1	1.4
Cork manufactures	16.5	n.a.	1.7	2.3	-	..

TABLE 3.15

WOOD PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE E.E.C.(EXCLUDING INTRA-TRADE)[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, WOOD PRODUCTS	12.5	10.1	8.1	10.6	7.8	6.7	7.2	9.3	6.0	7.5	8.4
Wood, shaped, or simply worked	11.5	8.5	6.7	9.7	7.0	5.5	6.4	9.4	5.5	8.0	8.9
Cork, raw and waste	-	-	-	-	..	-	-	0.1	..	0.6	-
Veneers, plywood boards, etc.	22.1	21.0	17.3	18.1	14.0	13.5	12.4	12.8	10.1	7.4	9.7
Wood manufactures, n.e.s.	5.8	3.8	3.6	2.8	2.7	2.3	2.2	2.2	2.1	4.3	2.0
Cork manufactures	-	..	..	0.1	..	0.1	-	..	0.1	0.1	..

1 For source and notes see Table 2.8.

CHAPTER IV

TRADE IN PAPER AND ALLIED PRODUCTS

CHAPTER IV
TRADE IN PAPER AND ALLIED PRODUCTS

4.1 CHARACTERISTICS OF THE DOMESTIC INDUSTRIES

The industries contained in this group[1] cover the production and trade of chemical and mechanical wood pulp, newsprint, book paper and writing paper originating in pulp and paper mills. These activities traditionally account for close to three quarters of the group's shipments. Another 15 percent of shipments is concentrated in paper box and bag manufacturing and the remaining ten percent in factories converting paper into paper articles and products by coating, cutting, pressing and combining with other materials. These activities divide into asphalt roofing products and miscellaneous paper converters manufacturing numerous specialized paper items.

Industrial concentration in the pulp and paper industries is less pronounced than in certain other groups within Canadian manufacturing. The twelve[2] leading enterprises comprise about two thirds of shipments and a similar proportion of employment. Corrugated box manufacturers appear to lead in this regard with significantly higher ratios. Foreign ownership[3] in this sector is a significant element. Close to one third of the establishments are foreign owned, more than one fifth in the United States. In 1974, 46 percent of shipments and 44 percent of employment were by foreign owned or foreign controlled companies.

In 1978, shipments of paper and allied industries were valued at $10.3 billion, third among manufacturing groups following food and beverages and transportation equipment. The annual rate of growth of 11.2 percent between 1967 and 1978 was only marginally lower than for overall manufacturing. The selected indicators shown in Table 4.1 summarize the relevant activities of this group between 1967 and 1978. It is clear that the shipments and employment generated by this group of industries are high on the list of importance to Canadian manufacturing as are exports with a significant 14.3 percent of total manufacturing exports. Imports, on the other hand, are small, though their growth over the period was significantly higher than for exports.

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1 1970 SIC codes 271 to 274

2 For the top four and eight the information is confidential (Industrial Organization and Concentration, Statistics Canada, 1974).

3 See corresponding note on page 23.

TABLE 4.1

PAPER AND ALLIED INDUSTRIES

SELECTED INDICATORS

	1967	1978	Average Annual Rate of Growth 1967-1978	1978 Share of Total Manufacturing Activity
			(percent)	
REAL DOMESTIC PRODUCT (Constant $, millions)	1,316.5	1,993.8	3.9	7.9
SHIPMENTS ($ millions)	3,231	10,343	11.2	7.9
DOMESTIC EXPORTS ($ millions)	1,600	5,664	12.2	14.6
IMPORTS LESS RE-EXPORTS ($ millions)	92	490	16.5	1.2
EMPLOYMENT (000's)	74	126	5.0	7.9
PROFITS ($ millions)	515	1,576	10.7	12.1
INVESTMENT ($ millions)	655.5	1,262.8	6.1	13.1

Source: See Table 2.1.

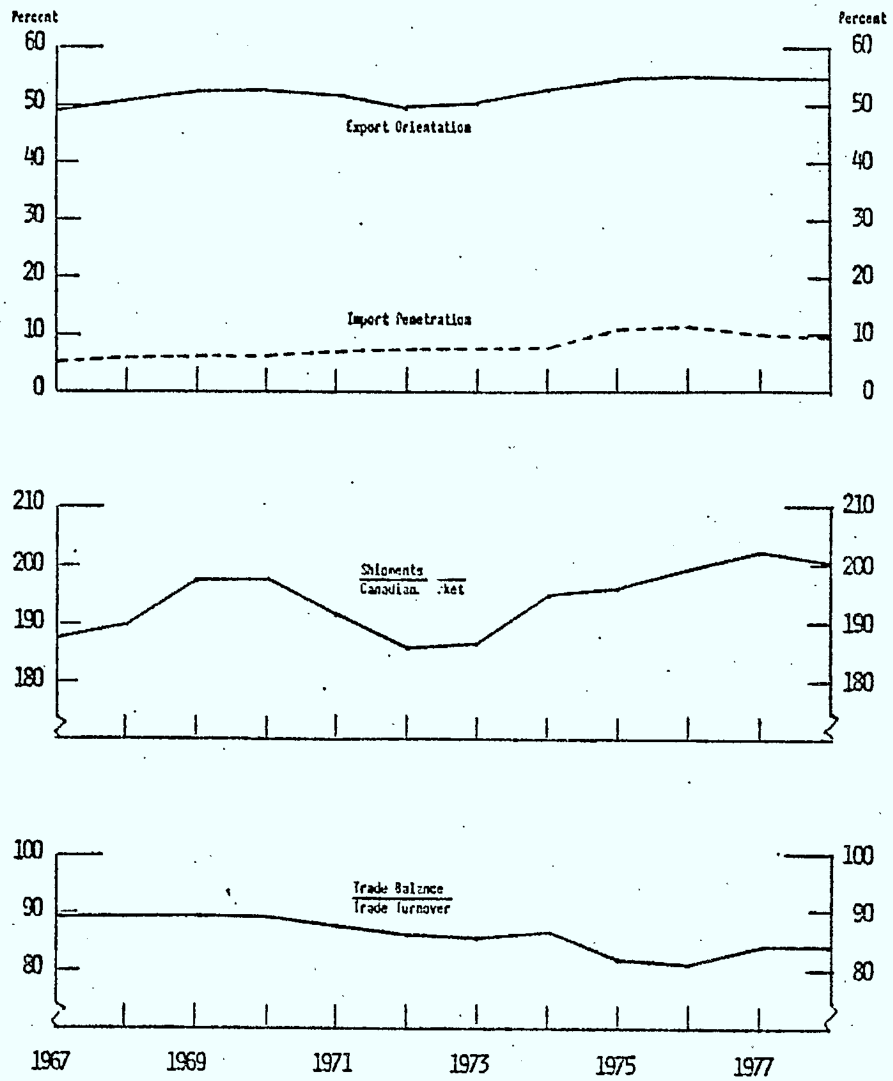
4.2 TRADE DEVELOPMENTS, 1967 to 1978

Due to a favourable resource base, scale of operation and proximity to the large United States market, this industry group developed as an international supplier of paper products and rose well above the requirements of the Canadian market early in its development. However, while the international environment imparted to the industry an underlying stimulus of growth, it also subjected the sector to a very competitive climate and world-wide cyclical and structural supply-demand fluctuations.

As a result, the average annual increase in exports of paper products between 1967 and 1978 was only 12.2 percent - markedly below that of overall manufacturing which rose 15 percent annually in the same period. Imports increased 16.5 percent annually but remain very small in absolute terms.

CHART 4.1

PAPER AND ALLIED INDUSTRIES: SELECTED TRADE MEASURES



As can be seen in Chart 4.1 and Table 4.2, the general trend of both export orientation and import penetration is upward. Export orientation rose from 50 percent in 1967 to 55 percent in 1978, import penetration from about 5 to 10 percent.

TABLE 4.2

PAPER AND ALLIED INDUSTRIES: TRADE MEASURES, 1967 TO 1978

YEAR	DOMESTIC EXPORTS	ADJUSTED IMPORTS[1]	TRADE BALANCE	TRADE TURNOVER (EXPORTS + IMPORTS)	CANADIAN FACTORY SHIPMENTS	CANADIAN MARKET[2]	TRADE BALANCE / TRADE TURNOVER	SHIPMENTS / CANADIAN MARKET	EXPORT ORIENTATION	IMPORT PENETRATION
	(MILLIONS OF DOLLARS)						(PERCENT)			
1967	1,600	92	1,509	1,692	3,231	1,723	89.2	187.6	49.5	5.3
1968	1,723	102	1,621	1,825	3,422	1,801	88.8	190.0	50.4	5.7
1969	2,008	116	1,892	2,123	3,834	1,942	89.1	197.4	52.4	6.0
1970	2,058	118	1,940	2,175	3,931	1,990	89.2	197.5	52.4	5.9
1971	2,049	134	1,915	2,183	4,001	2,086	87.7	191.8	51.2	6.4
1972	2,203	163	2,040	2,366	4,414	2,374	86.2	185.9	49.9	6.9
1973	2,648	204	2,443	2,852	5,271	2,828	85.7	186.4	50.2	7.2
1974	4,025	292	3,733	4,317	7,677	3,945	86.5	194.6	52.4	7.4
1975	3,877	383	3,495	4,260	7,132	3,637	82.0	196.1	54.4	10.5
1976	4,546	463	4,083	5,009	8,229	4,146	81.5	198.5	55.2	11.2
1977	4,986	429	4,557	5,415	9,012	4,455	84.1	202.3	55.3	9.6
1978	5,664	490	5,174	6,154	10,343	5,169	84.1	200.1	54.8	9.5

[1]Total imports less re-exports; [2]Shipments plus imports less exports.

The slower than average export growth did not prevent the trade surplus from increasing close to 3 1/2 times since 1967 to $5.2 billion in 1978. The normalized trade balance, however, dropped from 89 percent in 1967 to about 81 percent in 1976 and, with the drop in imports in 1977, then rose to 84 percent. The traditionally massive surplus from this sector contributes significantly to the trade performance of overall manufacturing. Resource based but employing highly developed and sophisticated production processes, the industry is capital intensive and also shows an above-average value added per employee within manufacturing.

The value of exports of paper and allied industries rose about 3 1/2 times between 1967 and 1978 to $5.7 billion. In this period, exports moved at a faster pace than the domestic market and provided an underlying stimulus to production. At the same time, imports which held slightly over 5 percent of the domestic market in 1967 increased 16.4 percent annually in a steady trend.

The industries shown in Table 4.3 have all shared fairly equally in export growth. By far, the largest proportion of export originated in the pulp and paper mills where the export orientation of production moved from about two thirds to close to three quarters of factory shipments between 1967 and 1976. More recently, the export share of shipments subsided to about 72 percent. The other industries indicate a much less developed pattern of export trade, though miscellaneous paper converters show a sharp rise of exports -- 18.9 percent annually from 1967. This was reflected in a steeply advancing export orientation of production which almost tripled in the period 1967-1978. Asphalt roofing products remain confined to the domestic market while paper boxes and bags trade very little. Given the nature of these products, this is not too surprising.

Imports of paper and allied products rose between 1967 and 1978 more than five-fold, from $92 million to $490 million. In comparison to exports, however, they remain small. The import penetration of the Canadian market increased from 5.3 percent in 1967 to a peak of 11.2 percent in 1976 but declined in the more recent years to around 9.5 percent. This measure for the group reflected a moderately upward trend in two industries, pulp and paper mills and miscellaneous paper converters.

Table 4.5 indicates that imports of pulp and paper products increased relativly faster, close to 18 percent per annum, than of miscellaneous paper products. As a consequence, the import penetration of the Canadian market for pulp and paper products increased proportionately more than for miscellaneous paper products. In 1975 and 1976, the Canadian industry was affected by strikes and this was reflected in higher imports and a sharply increased import penetration in both years. Miscellaneous paper products are very heterogeneous in their composition, and within the last decade developed a moderately specialized two-way pattern of trade.

TABLE 4.3

PAPER AND ALLIED INDUSTRIES: EXPORTS AND EXPORT ORIENTATION BY INDUSTRY, 1967 to 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
	(MILLIONS OF DOLLARS)											
DOMESTIC EXPORTS												
TOTAL	1,600	1,723	2,008	2,058	2,049	2,203	2,648	4,025	3,877	4,546	4,986	5,664
PULP & PAPER MILLS	1,570	1,688	1,972	2,013	2,001	2,132	2,550	3,898	3,773	4,424	4,837	5,452
ASPHALT ROOFING MFRS.	0	0	0	2	4	6	7	7	8	9	10	17
PAPER BOX & BAG MFRS.	2	2	3	5	4	5	5	7	7	5	7	8
MISC. PAPER CONVERTERS	28	33	33	38	41	60	86	113	90	107	132	187
	(PERCENT)											
EXPORT ORIENTATION												
TOTAL	49.5	50.4	52.4	52.4	51.2	49.9	50.2	52.4	54.4	55.2	55.3	54.8
PULP & PAPER MILLS	68.2	69.0	71.1	70.6	70.6	68.2	67.3	68.3	73.7	73.8	72.5	71.6
ASPHALT ROOFING MFRS.	0.0	0.0	0.0	5.2	7.7	9.6	8.7	6.7	6.6	6.0	6.1	6.9
PAPER BOX & BAG MFRS.	0.5	0.4	0.4	0.7	0.5	0.7	0.6	0.6	0.6	0.4	0.5	0.5
MISC. PAPER CONVERTERS	8.6	9.6	9.1	9.8	9.9	13.2	16.5	16.3	12.5	13.8	16.2	21.1

TABLE 4.4

PAPER AND ALLIED INDUSTRIES: SHIPMENTS AND IMPLICIT SELF SUFFICIENCY[1] BY INDUSTRY, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
						(MILLIONS OF DOLLARS)						
FACTORY SHIPMENTS												
TOTAL	3,231	3,422	3,834	3,931	4,001	4,414	5,271	7,677	7,132	8,229	9,012	10,343
PULP & PAPER MILLS	2,301	2,447	2,771	2,851	2,832	3,128	3,791	5,703	5,122	5,993	6,675	7,619
ASPHALT ROOFING MFRS.	60	59	63	39	51	63	77	102	121	148	167	244
PAPER BOX & BAG MFRS.	548	577	633	656	701	771	881	1,182	1,171	1,310	1,356	1,592
MISC. PAPER CONVERTERS	323	340	366	384	416	453	522	690	717	778	814	889
SHIPMENTS/CANADIAN MARKET						(PERCENT)						
TOTAL	187.6	190.0	197.4	197.5	191.8	185.9	186.4	194.6	196.1	198.5	202.3	200.1
PULP & PAPER MILLS	298.8	305.4	327.0	320.5	316.5	291.2	283.0	292.0	329.2	329.4	324.5	314.8
ASPHALT ROOFING MFRS.	100.0	100.0	100.0	105.5	108.4	110.6	109.5	107.2	107.1	106.4	106.5	107.4
PAPER BOX & BAG MFRS.	98.5	98.4	98.5	98.9	98.8	98.7	98.3	98.2	97.5	97.5	97.3	97.5
MISC. PAPER CONVERTERS	95.9	95.7	94.2	96.0	96.0	98.0	100.1	99.7	93.6	92.2	95.9	99.9

1 Ratio of shipments to Canadian market.

TABLE 4.5

PAPER AND ALLIED INDUSTRIES: IMPORTS AND IMPORT PENETRATION BY INDUSTRY, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
					(MILLIONS OF DOLLARS)							
ADJUSTED IMPORTS												
TOTAL	92	102	116	118	134	163	204	292	383	463	429	490
PULP & PAPER MILLS	39	43	48	52	63	78	98	148	207	251	218	253
ASPHALT ROOFING MFRS.	0	0	0	0	0	0	0	0	0	0	0	0
PAPER BOX & BAG MFRS.	11	12	12	12	12	16	21	29	37	39	44	49
MISC. PAPER CONVERTERS	42	48	56	54	58	69	86	115	139	174	167	188
IMPORT PENETRATION					(PERCENT)							
TOTAL	5.3	5.7	6.0	5.9	6.4	6.9	7.2	7.4	10.5	11.2	9.6	9.5
PULP & PAPER MILLS	5.0	5.3	5.6	5.8	7.1	7.3	7.3	7.6	13.3	13.8	10.6	10.4
ASPHALT ROOFING MFRS.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
PAPER BOX & BAG MFRS.	2.0	2.0	1.9	1.8	1.7	2.0	2.3	2.4	3.1	2.9	3.2	3.0
MISC. PAPER CONVERTERS	12.4	13.5	14.4	13.4	13.5	14.9	16.5	16.6	18.2	20.6	19.6	21.1

4.3 CANADA'S SHARE OF OECD IMPORTS, 1967 TO 1977

Throughout the period Canada continued to be the leading supplier of paper and allied products to the OECD import market. In 1977 this market amounted to $17 billion U.S., of which $4.6 billion U.S. or 26.9 percent was supplied by Canada (Table 4.6).

Following Canada the major suppliers were Sweden with 14.8 percent, the United States with 10.3 percent and Finland with 9.8 percent. Over the period, Sweden's market share declined while the U.S. share remained relatively stable. Finland's share declined at the rate of 2.5 percent per year, resulting in its drop from the third to fourth largest supplier. Led by West Germany, with more than a doubling of its market share, the EEC played an increasingly prominent role, growing at the rate of 5.2 percent per year and reaching 5.3 percent in 1977. Gains were also made by the other developed and the other developing market economies.

Canada's market share declined every year from 1967 to 1974 when it hit its lowest level of 24.7 percent. Since 1974 this share has increased and was maintained at 26.9 percent in both 1976 and 1977. Canada has increased or maintained its market share with the U.S., Japan and the EEC; however, the market in the OECD countries other than these has been growing faster than the OECD in total, and it is within these countries that Canada's share has been declining. The U.S. market accounts for 73.3 percent of Canada's OECD exports of paper and paper products (Table 4.7). From 1967 to 1975 this market grew more slowly than the OECD in total. The slow U.S. market growth and the decline of Canada's share of the other OECD countries combined to produce the overall decline in Canada's market share (Table 4.9).

As was the case for markets, this decline did not occur in all commodities either. In fact Canada's share of pulp and waste paper increased in all of the markets. The growth of imports from Canada at 17.1 percent per year was considerably higher than the total growth of these imports of 14.5 percent (Table 4.10). In the larger and more quickly growing market for paper and paperboard Canada's performance has been relatively poor. While Canada has increased it share of the U.S. market it has declined in each of the other OECD markets, thereby leading to an overall decrease in its share of these more highly processed commodities.

Although the cyclical influences on paper and allied products are much more moderate than for lumber, strikes and transportation tie-ups can severely limit our export sales. In the United States, new pulp and paper mills, based on the southern pine, have limited Canadian growth in this large market. Indigenous resources elsewhere have also posed as a competitive factor. In contrast, policies of some exporting countries, e.g. Finland, to export only paper products rather than pulp have tended to stimulate Canadian exports in the European market.

TABLE 4.6

PAPER AND ALLIED PRODUCTS: OECD IMPORTS BY SOURCE[1]
DISTRIBUTION AND AVERAGE ANNUAL RATE OF CHANGE

	DISTRIBUTION percent											Percent Change
	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1967-1977
Total Imports	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	
Developed Market Economies												
Canada	33.7	32.9	32.2	29.7	30.0	28.1	25.4	24.7	26.0	26.9	26.9	- 2.2
Sweden	17.5	16.5	16.1	16.5	16.2	16.3	17.4	17.2	17.4	15.8	14.8	- 1.7
United States	10.0	10.2	10.1	11.5	10.7	10.3	9.6	11.3	12.3	11.4	10.3	0.3
Finland	12.6	12.2	12.0	11.8	11.2	11.2	11.2	10.4	9.8	9.4	9.8	- 2.5
West Germany	4.0	4.5	4.9	5.3	6.1	6.6	7.5	7.4	6.6	7.6	8.1	7.3
France	2.1	2.4	2.5	2.8	3.1	3.4	3.8	3.8	3.7	3.8	4.1	6.9
Netherlands	3.2	3.3	3.5	3.5	3.7	3.9	4.4	4.2	3.8	3.8	4.0	2.3
Belgium-Luxembourg	2.3	2.7	3.1	3.3	3.3	3.8	3.8	3.4	3.4	3.7	3.8	5.1
Norway	4.2	4.3	4.2	4.1	3.9	3.6	3.7	3.7	3.4	3.1	2.9	- 3.6
Austria	1.8	1.9	1.5	1.9	2.1	2.2	2.2	2.3	2.2	2.3	2.2	2.0
Japan	0.5	0.7	0.7	0.8	0.9	1.0	0.9	1.2	1.0	1.0	1.1	8.2
Total EEC (9)	15.3	16.8	18.1	19.0	20.6	22.3	24.1	23.3	22.2	23.6	25.3	5.2
Other Developed Market Economies	2.6	2.9	3.3	3.0	3.0	3.3	3.5	3.7	3.7	4.2	4.0	4.4
OPEC	0.1	0.1	..	..	..	..	..	..	..	..	..	- 6.7
Other Developing Market Economies	0.4	0.4	0.4	0.5	0.5	0.7	1.0	1.1	1.0	1.1	1.3	12.5
Centrally Planned Economies	1.2	1.1	1.2	1.1	1.0	1.0	1.0	1.1	0.9	1.3	1.4	1.2
ADDENDUM												
Total Imports in Millions of U.S. Dollars	4,548	4,969	5,820	6,519	6,697	7,746	10,222	15.876	14,211	16,349	17,131	

TABLE 4.7

PAPER AND ALLIED PRODUCTS: PERCENTAGE OF CANADA'S EXPORTS BY DESTINATION[2]

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	OECD Share 1977
O.E.C.D.	94.6	94.7	93.8	91.4	91.7	91.9	92.8	91.0	91.2	92.1	91.3	100.0
United States	77.2	74.9	74.6	69.6	70.4	68.8	69.5	64.4	63.8	64.4	67.0	73.4
Japan	2.7	3.6	4.0	4.0	3.0	3.2	4.8	5.1	4.2	4.2	3.4	3.7
E.E.C. (9)	12.3	13.7	12.8	14.6	15.4	17.5	16.1	18.4	20.2	20.9	18.4	20.2
United Kingdom	7.3	7.7	6.6	7.5	7.3	9.0	7.4	7.5	8.0	8.0	7.3	8.0
Rest of World	5.4	5.3	6.2	8.6	8.3	8.1	7.2	9.0	8.0	7.9	8.7	

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1 For source and notes see Table 2.6.

2 For source and notes see Table 2.7.

TABLE 4.8

PAPER AND ALLIED PRODUCTS: GROWTH OF FOREIGN IMPORTS[1]

(percent)

	OECD	U.S.A.	JAPAN	EEC (9)*	OTHER OECD	DEVELOPING COUNTRIES**
1967	-	-	-	-	-	-
1968	9.3	3.7	11.9	9.1	15.8	9.4
1969	17.1	12.3	19.9	16.6	22.9	11.4
1970	12.0	-0.9	14.4	15.4	19.2	21.8
1971	2.7	4.8	-18.4	-1.3	9.2	-0.1
1972	15.7	6.8	25.4	16.0	21.4	8.0
1973	32.0	20.9	83.0	27.5	40.9	36.0
1974	55.3	38.3	126.3	58.7	53.8	77.4
1975	-10.5	-8.7	-41.3	-7.1	-10.5	-12.8
1976	15.0	23.5	9.5	10.2	16.9	3.9
1977	4.8	8.5	5.5	0.7	7.3	15.2

TABLE 4.9

PAPER AND ALLIED PRODUCTS: CANADA'S TRADE SHARE BY MARKET[1]

(percent)

1967	33.7	91.1	33.7	10.9	3.2	10.2
1968	33.0	90.8	43.2	11.9	3.0	10.1
1969	32.2	91.5	48.2	11.7	2.8	12.2
1970	29.7	91.2	47.0	12.3	3.2	14.1
1971	30.0	91.7	44.4	12.7	3.2	13.7
1972	28.1	90.5	40.3	13.6	2.4	14.3
1973	25.4	89.4	35.5	11.4	2.4	11.0
1974	24.7	91.6	27.7	12.8	2.7	12.5
1975	26.0	93.4	36.5	14.0	3.2	12.0
1976	26.9	92.2	36.7	14.8	2.5	12.3
1977	26.9	91.0	29.9	15.2	2.1	13.2

1 For source and notes see Table 2.8.

TABLE 4.10

PAPER AND ALLIED PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE OECD[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
	Total OECD Imports	Imports from Canada	Total OECD Imports 1967	Total OECD Imports 1977	Imports from Canada 1967	Imports from Canada 1977
TOTAL, PAPER AND ALLIED PRODUCTS	14.2	11.6	100.0	100.0	100.0	100.0
Pulp and waste paper	12.4	14.8	35.5	30.4	33.5	44.4
Paper and paperboard	14.3	9.6	57.4	57.9	66.2	54.9
Articles of paperboard, paper pulp or paper	20.2	21.9	7.0	11.7	0.3	0.7

TABLE 4.11

PAPER AND ALLIED PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE OECD[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, PAPER AND ALLIED PRODUCTS	33.7	33.0	32.2	29.7	30.[illegible]	28.1	25.4	24.7	26.0	26.9	26.9
Pulp and waste paper	31.8	34.3	35.4	32.9	36.6	35.3	33.9	35.3	37.3	38.9	39.2
Paper and paperboard	38.8	36.3	34.5	32.0	31.0	28.9	25.1	22.4	24.0	24.7	25.5
Articles of paperboard, paper pulp or paper	1.4	1.6	2.0	1.6	1.7	2.0	1.9	1.7	1.5	1.5	1.6

TABLE 4.12

PAPER AND ALLIED PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE U.S.A.[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
	Total U.S.A. Imports	Imports from Canada	Total U.S.A. Imports 1967	Total U.S.A. Imports 1977	Imports from Canada 1967	Imports from Canada 1977
TOTAL, PAPER AND ALLIED PRODUCTS	10.2	10.2	100.0	100.0	100.0	100.0
Pulp and waste paper	11.5	12.0	29.5	33.2	29.9	35.1
Paper and paperboard	9.2	9.2	68.8	63.1	69.9	64.2
Articles of paperboard, paper pulp or paper	19.5	24.7	1.7	3.8	0.2	0.8

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1 For source and notes see Table 2.8.

TABLE 4.13

PAPER AND ALLIED PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE UNITED STATES[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, PAPER AND ALLIED PRODUCTS	91.1	90.8	91.5	91.2	91.1	90.5	89.4	91.6	93.4	92.2	91.0
Pulp and waste paper	92.2	93.5	96.2	96.2	96.6	96.7	94.8	96.4	96.8	96.1	96.2
Paper and paperboard	92.6	92.0	92.3	92.3	93.1	91.9	90.5	92.0	94.9	94.0	92.6
Articles of paperboard, paper pulp or paper	12.1	13.6	17.3	14.5	15.9	18.8	21.3	22.0	21.1	17.8	18.6

TABLE 4.14

PAPER AND ALLIED PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE E.E.C.[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
			Total E.E.C. Imports		Imports from Canada	
	Total E.E.C. Imports	Imports from Canada	1967	1977	1967	1977
TOTAL, PAPER AND ALLIED PRODUCTS	13.4	17.3	100.0	100.0	100.0	100.0
Pulp and waste paper	11.9	21.7	46.5	40.7	44.9	65.0
Paper and paperboard	14.2	12.0	50.8	54.5	54.7	34.6
Articles of paperboard, paper pulp or paper	19.9	15.1	2.8	4.8	0.5	0.4

TABLE 4.15

PAPER AND ALLIED PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE E.E.C. (EXCLUDING INTRA TRADE)[2]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, PAPER AND ALLIED PRODUCTS	10.9	11.9	11.7	12.3	12.7	13.6	11.4	12.8	14.0	14.8	15.2
Pulp and waste paper	10.5	13.0	13.5	14.9	17.7	19.3	16.7	19.7	21.9	23.5	24.3
Paper and paperboard	11.7	11.4	10.7	10.3	9.3	10.0	8.2	8.3	8.5	8.5	9.7
Articles of paperboard, paper pulp or paper	1.8	1.8	1.6	1.8	1.8	2.3	1.9	1.5	1.4	1.4	1.2

1 For source and notes see Table 2.8.

CHAPTER V

TRADE IN PRIMARY METAL PRODUCTS

CHAPTER V

TRADE IN PRIMARY METAL PRODUCTS

5.1 CHARACTERISTICS OF THE DOMESTIC INDUSTRIES

In comparison to the other manufacturing industry groups, the Canadian primary metal industries[1] are very well developed and rest on a broad resource base of ferrous and non-ferrous mining. They account for the primary stages of smelting, refining and metal forming, up to an including the semi-fabricated products of rolling and extruding. Iron and steel mills, steel pipe and tube mills and iron foundries encompass the ferrous section. Smelting and refining and various non-ferrous metal rolling, casting and extruding are examples of aluminum, copper, lead, zinc, nickel, or of other metal and alloy shaping into commonly used forms.

The degree of concentration[2] in this group is among the highest in manufacturing. The weighted average of the leading four enterprises in 1974 accounted for 74.3 percent of value added. In the steel sector, the four leading establishments accounted for 68 percent of the value of shipments or value added, and about 63 percent of total employment. Smelting and refining (non-ferrous) however, experienced a significantly lower level of concentration. This was 44 percent for shipments and about the same for employment in a similar comparison of the top four leading establishments in 1974.

Foreign ownership[3] in this sector was less than a quarter in 1974, with about 15 percent of this owned in the United States on the basis of shipments or of establishments. Only about a fifth of employment is generated by the foreign owned group. In general, iron and steel mills have a much smaller proportion of foreign ownership in production and employment than non-ferrous smelting and refining where foreign control, especially at higher levels of processing, is markedly more visible.

An impression of the overall importance of the primary metals group to Canadian manufacturing is given in Table 5.1. It is clear that with about 8 percent of the manufacturing output and 7.5 percent of employment, at 12 percent the industries contribute an above-average share of exports. Imports are much less significant though their growth since 1967 was moderately faster than for shipments or sales in foreign markets.

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1 1970 SIC codes 291-298

2 See corresponding notes on page 23.

3 See corresponding notes on page 23.

TABLE 5.1

PRIMARY METAL INDUSTRIES

SELECTED INDICATORS

	1967	1978	Average Annual Rate of Growth 1967-1978	1978 Share of Total Manufacturing Activity
			(percent)	
REAL DOMESTIC PRODUCT (Constant $, millions)	1,385.3	2,037.1	3.6	8.1
SHIPMENTS ($ millions)	3,053	9,934	11.3	7.6
DOMESTIC EXPORTS ($ millions)	1,452	4,742	11.4	12.2
IMPORTS LESS RE-EXPORTS ($ millions)	495	1,828	12.6	4.4
EMPLOYMENT (000's)	111	119	0.6	7.5
PROFITS ($ millions)	424	1,206	10.0	9.2
INVESTMENT ($ millions)	567.9	1,486.1	9.1	15.4

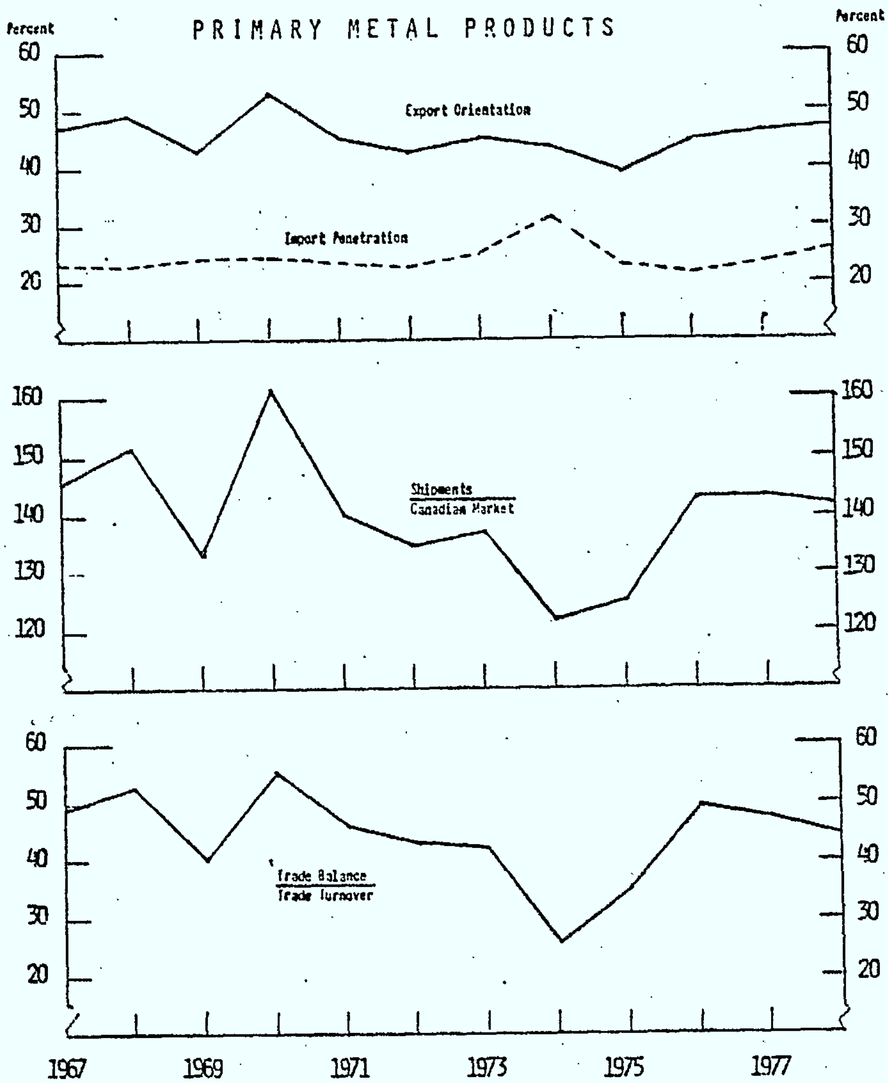
Source: See Table 2.1.

5.2 TRADE DEVELOPMENTS, 1967 TO 1978

In relation to manufacturing, output of primary metals and their domestic market changed very little between 1967 and 1978. In trade, however, primary metals experienced a relative decline in their shares of manufacturing as a result of below average growth rates in both exports and imports. The relative drop was more significant for exports, in imports it was slight. The shift originated in the pattern of trade in non-ferrous metals and their products. Their import growth was also stronger than for exports.

CHART 5.1

PRIMARY METAL INDUSTRIES: SELECTED TRADE MEASURES



Sales of ferrous and non-ferrous metals products experience the cyclical influence of the demand for investment goods (construction, machinery and equipment) and durable goods. Strikes in the industry in Canada or in the large United States market often hinder or swell export performance; imports experience similar effects. In the longer run, the industries are subject to competitive pressures from new resources coming on stream elsewhere causing massive shifts in established markets. Government sponsored, regulated and protected industries of other countries often have an undue advantage in world markets. More recently, energy and pollution abatement policies have also played an important role in the industry's development.

TABLE 5.2

PRIMARY METAL INDUSTRIES: TRADE MEASURES, 1967 TO 1978

YEAR	DOMESTIC EXPORTS	ADJUSTED IMPORTS[1]	TRADE BALANCE	TRADE TURNOVER (EXPORTS + IMPORTS)	CANADIAN FACTORY SHIPMENTS	CANADIAN MARKET[2]	TRADE BALANCE / TRADE TURNOVER	SHIPMENTS / CANADIAN MARKET	EXPORT ORIENTATION	IMPORT PENETRATION
	(MILLIONS OF DOLLARS)						(PERCENT)			
1967	1,452	495	957	1,947	3,053	2,096	49.1	145.6	47.6	23.6
1968	1,666	517	1,150	2,183	3,384	2,234	52.7	151.5	49.2	23.1
1969	1,545	659	887	2,204	3,574	2,688	40.2	133.0	43.2	24.5
1970	2,093	597	1,496	2,690	3,919	2,423	55.6	161.8	53.4	24.6
1971	1,790	662	1,127	2,452	3,948	2,021	46.0	140.0	45.3	23.5
1972	1,790	716	1,074	2,506	4,193	3,120	42.9	134.4	42.7	23.0
1973	2,229	902	1,327	3,131	4,918	3,591	42.4	137.0	45.3	25.1
1974	2,865	1,694	1,171	4,560	6,535	5,364	25.7	121.8	43.8	31.6
1975	2,600	1,243	1,358	3,843	6,682	5,325	35.3	125.5	38.9	23.3
1976	3,186	1,078	2,108	4,264	7,029	4,921	49.4	142.8	45.3	21.9
1977	3,656	1,294	2,363	4,950	7,864	5,501	47.7	143.0	46.5	23.5
1978	4,742	1,828	2,914	6,570	9,934	7,020	44.4	141.5	47.7	26.0

[1] Total imports less re-exports; [2] Shipments plus imports less exports.

TABLE 5.3

PRIMARY METAL INDUSTRIES: EXPORTS AND EXPORT ORIENTATION BY INDUSTRY, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
						(MILLIONS OF DOLLARS)						
DOMESTIC EXPORTS												
TOTAL	1,452	1,666	1,545	2,093	1,790	1,790	2,229	2,865	2,600	3,186	3,656	4,742
IRON & STEEL MILLS	209	249	230	336	306	310	338	501	446	566	751	1,050
STEEL PIPE & TUBE MILLS	17	61	38	52	41	34	56	145	208	149	143	210
IRON FOUNDRIES	24	24	28	31	34	40	68	74	70	99	109	105
SMELTING & REFINING	1,043	1,132	1,088	1,439	1,203	1,194	1,444	1,776	1,574	1,993	2,241	2,966
ROLL. CAST. EXTRUDING (ALUMINUM)	31	30	25	21	25	32	26	45	35	40	71	78
ROLL. CAST. EXTRUDING (COPPER,ALLOYS)	59	82	67	85	66	74	109	134	63	73	90	113
ROLL. CAST. EXTRUDING (N.E.S.)	69	88	70	129	115	106	189	190	204	266	251	220
EXPORT ORIENTATION						(PERCENT)						
TOTAL	47.6	49.2	43.2	53.4	45.3	42.7	45.3	43.8	38.9	45.3	46.5	47.7
IRON & STEEL MILLS	17.0	18.2	16.2	19.9	17.3	16.3	14.6	16.5	14.2	16.4	19.8	21.8
STEEL PIPE & TUBE MILLS	8.1	22.5	15.0	20.5	15.1	9.9	17.4	32.5	37.0	30.0	28.0	31.7
IRON FOUNDRIES	12.8	13.0	13.5	14.6	15.6	17.0	24.0	18.6	16.2	22.5	22.7	18.9
SMELTING & REFINING	121.0	121.4	110.6	133.2	115.1	122.1	136.3	126.0	101.5	138.1	125.0	129.1
ROLL. CAST. EXTRUDING (ALUMINUM)	16.4	14.5	10.0	8.7	9.9	10.9	8.0	9.5	7.9	7.4	12.2	10.5
ROLL. CAST. EXTRUDING (COPPER,ALLOYS)	24.8	29.9	22.5	29.7	25.1	25.8	26.9	27.1	19.8	19.6	23.7	26.8
ROLL. CAST. EXTRUDING (N.E.S.)	50.3	59.8	42.6	83.9	83.1	65.7	88.9	68.7	87.9	94.6	76.9	51.2

1 Exports exceed shipments partly because of valuation differences, and partly because of difficulties in trade and shipments allocation.

Traditionally, the primary metals groups has provided large trade surpluses, especially from the non-ferrous metal sector. In 1967 the overall trade surplus, on a customs value, was close to $1.0 billion and the normalized trade surplus equal to about 49 percent of total trade turnover. The modestly lower export growth relative to imports over the period, however, reduced the normalized surplus to about 44 percent of trade turnover in 1978. In absolute terms, however, the trade surplus for the group was still a healthy $2.9 billion in 1978.

The export performance among industries within the group shows a wide variety of trade involvement (Table 5.3). The group is dominated by the non-ferrous smelting and refining industry which in 1978 had a 62 percent share of primary metals exports. Differences between the valuation of shipments and that for exports and imports together with a typical difficulty in allocating trade data to the standard industrial classification leave much to be desired with regard to the various trade measures for the industries. Even so, their trade involvement and contribution to overall manufacturing exports is well recorded.

Although nothing like the smelting and refining industries, the other non-ferrous metal exports (in rolled, cast and extruded forms), apart from aluminum, are also heavily involved in export sales. One of the common features in the non-ferrous exports (primary and rolled) during the 1967 to 1978 period was their relatively low rate of growth, generally below 10 percent per annum. At the same time, imports displayed above average growth, especially for smelting and refining (18.8%) and copper rolling (14.0%). In this regard, competing plants established in other countries (aluminum) and protracted strikes in the Canadian industry considerably affected Canada's export performance.

Exports of iron and steel are mainly concentrated in the primary forms leaving the iron and steel mills. In contrast to non-ferrous metals, there has been a notable trend to higher export orientation supported by markedly higher rates of export growth relative to imports. In this regard, the steel pipe and tube mills registered a growth of 25 percent annually for their exports and their export orientation close to quadrupled in the period.

In contrast to exports, imports of primary metals are concentrated more heavily in the iron and steel products than in non-ferrous metals (Table 5.5). In 1978, close to 58 percent of the group's imports were in this category. The overall rate of growth for the imports of primary metals between 1967 and 1978 was 12.6 percent per year. Import penetration at the overall group level fluctuated between 23 and 26 percent (apart from 1974) with no marked tendency to rise of fall.

Among the industries in this group, the highest penetration by imports was shown by steel pipe and tube mill products, rising from 24.2 to 36.6 percent between 1967 and 1978. Products of iron and steel mills, by far the largest industry, experienced a relatively flat trend in import penetration in the 'sixties. Strikes in the industry in 1974 led to increased imports and a deterioration in this measure at that time, but there has been a subsequent improvement since then with import penetration falling below that prevailing early in the period. Iron foundries experienced an erosion of the domestic market between 1967 and 1970 and an increase in import penetration from 12.3 to 28 percent. Since 1970, import penetration has gradually declined as domestic producers increased their share of domestic markets as well as substantially increasing export sales (Tables 5.3, 5.4 and 5.5).

In non-ferrous metals, the highest import penetration was found in aluminum rolling, casting and extruding. Here, a decline in the 1960's was followed by little change to 1975 when it dropped again, followed by some increase in 1976 and 1977. In contrast, the import penetration of rolled copper steadily increased throughout the period under review. That for products not elsewhere specified increased somewhat erratically up to 1976 and then declined sharply in 1977 and 1978.

TABLE 5.4

PRIMARY METAL INDUSTRIES: SHIPMENTS AND IMPLICIT SELF-SUFFICIENCY[1] BY INDUSTRY, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
						(MILLIONS OF DOLLARS)						
FACTORY SHIPMENTS												
TOTAL	3,053	3,384	3,574	3,919	3,948	4,193	4,918	6,535	6,682	7,029	7,864	9,934
IRON & STEEL MILLS	1,229	1,367	1,423	1,692	1,764	1,901	2,318	3,036	3,148	3,460	3,790	4,817
STEEL PIPE & TUBE MILLS	211	271	252	252	274	340	320	447	561	498	513	664
IRON FOUNDRIES	190	186	209	212	215	233	284	399	430	440	482	559
SMELTING & REFINING	862	933	984	1,080	1,046	978	1,060	1,410	1,551	1,443	1,792	2,298
ROLL. CAST. EXTRUDING (ALUMINUM)	188	206	245	242	248	294	321	473	441	534	579	747
ROLL. CAST. EXTRUDING (COPPER,ALLOYS)	236	275	296	286	263	285	403	494	320	372	381	420
ROLL. CAST. EXTRUDING (N.E.S.)	137	147	165	154	138	162	213	276	232	281	326	429
SHIPMENTS/CANADIAN MARKET						(PERCENT)						
TOTAL	145.6	151.5	133.0	161.8	140.0	134.4	137.0	121.8	125.5	142.8	143.0	141.5
IRON & STEEL MILLS	97.3	101.6	92.9	103.3	98.5	97.6	94.3	86.5	94.1	102.6	104.7	107.3
STEEL PIPE & TUBE MILLS	82.5	101.6	92.6	95.0	90.1	88.9	89.5	100.3	106.2	104.7	95.9	92.8
IRON FOUNDRIES	100.5	97.6	94.5	84.3	87.8	91.9	111.4	105.2	101.6	111.2	111.7	107.2
SMELTING & REFINING	-755.7	-956.7	9284.2	-399.5	-1529.9	-875.1	-434.4	-3086.0	835.5	-419.5	-803.1	-1043.4
ROLL. CAST. EXTRUDING (ALUMINUM)	80.1	81.1	82.7	83.8	82.5	86.0	81.4	84.6	88.7	84.8	84.3	82.2
ROLL. CAST. EXTRUDING (COPPER,ALLOYS)	126.3	136.2	121.3	133.7	123.2	123.2	123.9	125.3	113.7	109.7	115.5	120.8
ROLL. CAST. EXTRUDING (N.E.S.)	169.6	199.7	148.0	444.9	382.1	221.1	475.6	224.8	364.3	563.4	270.9	166.8

[1] Ratio of shipments to Canadian market.

TABLE 5.5

PRIMARY METAL INDUSTRIES: IMPORTS AND IMPORT PENETRATION BY INDUSTRY, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
	(MILLIONS OF DOLLARS)											
ADJUSTED IMPORTS												
TOTAL	495	517	659	597	662	716	902	1,694	1,243	1,078	1,294	1,828
IRON & STEEL MILLS	243	227	339	283	332	358	478	974	645	480	580	723
STEEL PIPE & TUBE MILLS	62	57	58	65	71	76	93	144	175	127	165	262
IRON FOUNDRIES	23	29	40	70	63	60	39	54	63	55	59	68
SMELTING & REFINING	67	102	114	88	89	104	141	321	209	206	226	448
ROLL. CAST. EXTRUDING (ALUMINUM)	78	78	76	68	77	80	99	131	91	136	179	240
ROLL. CAST. EXTRUDING (COPPER,ALLOYS)	9	9	15	13	16	20	31	34	25	40	39	40
ROLL. CAST. EXTRUDING (N.E.S.)	13	15	17	10	13	18	21	36	36	35	45	48
	(PERCENT)											
IMPORT PENETRATION												
TOTAL	23.6	23.1	24.5	24.6	23.5	23.0	25.1	31.6	23.3	21.9	23.5	26.0
IRON & STEEL MILLS	19.3	16.9	22.1	17.3	18.5	18.4	19.4	27.8	19.3	14.2	16.0	16.1
STEEL PIPE & TUBE MILLS	24.2	21.3	21.4	24.4	23.5	19.9	26.1	32.3	33.1	26.7	30.9	36.6
IRON FOUNDRIES	12.3	15.1	18.2	28.0	25.9	23.8	15.4	14.4	14.8	13.8	13.7	13.1
SMELTING & REFINING	-58.7	-104.9	1080.4	-32.7	-130.3	-93.4	-57.7	-702.4	112.5	-59.9	-101.1	-203.2
ROLL. CAST. EXTRUDING (ALUMINUM)	33.0	30.7	25.6	23.4	25.6	23.3	25.1	23.4	18.3	21.5	26.0	26.4
ROLL. CAST. EXTRUDING (COPPER,ALLOYS)	5.1	4.6	6.0	6.0	7.7	8.6	9.4	8.6	8.9	11.8	11.9	11.5
ROLL. CAST. EXTRUDING (N.E.S.)	15.7	19.7	15.0	28.2	35.4	24.1	47.4	29.6	56.1	69.7	37.6	18.6

1 The calculations of the domestic market, to which imports are related, are not strictly correct due to valuation differences and allocation difficulties. See also note to Table 5.3

5.3 CANADA'S SHARE OF OECD IMPORTS, 1967 TO 1977

Total OECD imports of primary metal products in 1977 amounted to $46.6 billion U.S., of which $2.7 billion U.S. or 5.9 percent was supplied by Canada.

In 1977 Canada was the fifth largest supplier of primary metal products to the OECD (Table 5.6). The largest suppliers were West Germany, Belgium-Luxembourg, Japan and France. West Germany increased its market share from 1967 to 1973 when it peaked at 21.5 percent during the resource price boom. Since then its share has declined to 14.1 percent. Belgium-Luxembourg has maintained its share throughout the period, with an unsustained increase during 1973-74. Japan made the largest gains over the period almost doubling its market share by 1977. Japan began the period as the seventh largest supplier and ended it as the third. France increased its market share from 6.5 percent in 1967 to 8.1 percent in 1977. The EEC as a whole increased its share from 43.4 percent in 1967 to 46.3 percent in 1977.

Canada's share has been in decline since 1967. Beginning the period as the third largest supplier with a market share of 8.4 percent, it ended it as the fifth largest with 5.9 percent. It is the only country of the present top five suppliers to have had an overall decline in the period. The decline was broadbased as it took place in all of Canada's major OECD markets (Table 5.9). The recovery which has been demonstrated since 1974 is more narrowly based in that it took place primarily in the U.S. and partially in Japan (in 1977). The recovery in the U.S. market dominated Canada's position, since this market in 1977 accounted for 80.0 percent of Canada's OECD exports of primary metal products (Table 5.7).

While in overall terms Canada's market share decreased, the situation is very different in terms of the two major subsectors. In the larger and generally faster growing ferrous sector Canada has performed relatively well. Canada's exports of five of these commodities to the OECD have grown considerably faster than the corresponding OECD imports (Tables 5.10 and 5.11). In 1967 the ferrous commodities represented about 15 percent of the OECD imports from Canada of primary metal products. By 1977 this had increased to almost 28 percent. The increase in the importance of the ferrous commodities is mirrored in the decreasing importance of the non-ferrous products. Copper, nickel and aluminum together represent 54 percent of Canada's OECD exports of primary metal products. Canada's market share of aluminum has declined drastically in all of the markets. Its shares of copper and nickel have made small gains in some markets but have declined overall. The result is that the structure of primary metal products exports from Canada has been changing from the traditional dependence on non-ferrous commodities.

TABLE 5.6

PRIMARY METAL PRODUCTS: OECD IMPORTS BY SOURCE[1] DISTRIBUTION AND AVERAGE ANNUAL RATE OF CHANGE

	DISTRIBUTION percent											Percent Change
	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1967-1977
Total Imports	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	
Developed Market Economies												
West Germany	13.5	12.6	12.1	12.3	13.4	13.6	21.5	16.1	16.0	14.0	14.1	0.4
Belgium-Luxembourg	11.2	11.3	12.1	11.8	11.9	12.6	19.0	21.2	10.5	11.1	10.4	- 0.7
Japan	5.2	6.5	6.1	7.1	8.9	8.0	9.8	8.3	10.6	10.0	9.1	5.8
France	6.5	6.3	6.4	6.8	7.4	7.4	10.7	5.4	7.7	7.4	8.1	2.2
Canada	8.4	8.3	7.0	7.7	7.4	6.8	8.1	5.0	5.1	5.5	5.9	- 3.5
United Kingdom	6.8	6.5	6.1	5.8	6.1	6.1	8.3	5.0	4.9	5.1	5.1	- 2.8
Netherlands	3.3	2.9	3.2	3.2	3.9	4.3	6.4	4.3	4.4	4.5	4.5	3.2
United States	8.3	5.9	7.0	7.4	4.8	4.7	7.2	5.4	4.9	4.1	3.9	- 4.7
Sweden	3.2	3.1	3.3	3.1	3.1	3.2	4.7	2.9	3.5	3.1	3.3	0.3
Norway	3.0	3.2	3.3	2.9	3.2	3.2	4.1	2.6	2.9	3.2	2.9	- 0.3.
Total EEC (9)	43.4	42.2	42.1	41.9	45.7	47.2	47.7	47.3	47.3	45.8	46.3	0.6
Other Developed Market Economies	7.5	7.4	8.0	8.5	8.5	9.4	9.8	9.4	9.7	10.9	11.3	4.2
OPEC	0.5	1.3	0.6	0.6	0.6	0.4	0.9	0.8	0.7	0.7	0.9	6.1
Other Developing Market Economies	17.2	17.4	17.8	16.2	12.8	12.1	13.0	13.2	10.3	11.7	11.6	- 3.9
Centrally Planned Economies	5.3	4.7	4.8	4.6	5.0	5.2	8.4	5.2	5.1	4.9	4.9	- 0.8
ADDENDUM												
Total Imports in Millions of U.S. Dollars	13,624	15,997	18,655	22,043	20,247	23,140	32,218	47,615	39,268	42,795	46,581	

TABLE 5.7

PRIMARY METAL PRODUCTS: PERCENTAGE OF CANADA'S EXPORTS BY DESTINATION[2]

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	OECD Share 1977
O.E.C.D.	71.1	74.2	73.7	65.2	67.5	70.0	68.7	70.3	67.0	70.6	76.6	100.0
United States	41.7	48.5	45.6	33.9	42.2	46.9	45.0	48.7	45.7	53.3	61.1	79.8
Japan	4.2	3.8	4.7	2.8	2.3	1.8	2.6	2.0	1.2	1.0	1.5	2.0
E.E.C. (9)	21.9	19.7	20.3	25.0	19.4	18.7	18.8	16.7	17.7	13.9	11.9	15.5
United Kingdom	16.6	14.7	13.5	16.2	12.1	12.8	11.6	10.0	8.3	7.2	6.2	8.1
Rest of World	28.9	25.8	26.3	34.8	32.5	30.0	31.3	29.7	33.0	29.4	23.4	

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1 For source and notes see Table 2.6.

2 For source and notes see Table 2.7.

TABLE 5.8

PRIMARY METAL PRODUCTS: GROWTH OF FOREIGN IMPORTS

(percent)

	OECD	U.S.A.	JAPAN	EEC (9)*	OTHER OECD	DEVELOPING COUNTRIES**
1967	-	-	-	-	-	-
1968	17.4	35.6	- 6.9	22.6	9.6	8.7
1969	16.6	-16.0	28.8	25.2	28.7	19.5
1970	18.2	10.3	6.2	19.7	21.8	23.3
1971	- 8.1	16.0	-32.4	-22.7	-4.9	3.8
1972	14.3	13.7	24.4	9.7	16.0	12.3
1973	39.2	12.8	85.1	42.6	44.6	62.4
1974	47.8	70.3	27.8	34.0	49.1	105.5
1975	-17.5	-22.0	-39.3	-17.1	-14.0	1.7
1976	9.0	10.0	17.7	14.5	5.8	-18.1
1977	8.8	24.2	14.2	7.2	3.8	11.1

TABLE 5.9

PRIMARY METAL PRODUCTS: CANADA'S TRADE SHARE BY MARKET[1]

(percent)

	OECD	U.S.A.	JAPAN	EEC (9)*	OTHER OECD	DEVELOPING COUNTRIES**
1967	8.4	22.9	6.6	10.1	0.9	4.4
1968	8.3	21.3	6.3	8.8	0.7	3.9
1969	7.0	23.2	7.2	7.2	0.6	3.4
1970	7.7	24.0	6.2	10.0	0.8	4.5
1971	7.4	21.5	6.0	9.1	0.8	3.8
1972	6.8	21.6	5.2	7.2	0.6	2.8
1973	5.5	20.5	4.5	6.4	0.4	2.4
1974	5.0	16.8	3.4	6.0	0.5	2.0
1975	5.1	18.7	3.3	5.6	0.4	2.1
1976	5.5	20.9	2.8	5.4	0.5	2.7
1977	5.9	20.4	4.1	4.8	0.5	2.3

[1] For source and notes see Table 2.8.

TABLE 5.10

PRIMARY METAL PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE OECD

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
			Total OECD Imports		Imports from Canada	
	Total OECD Imports	Imports from Canada	1967	1977	1967	1977
TOTAL, PRIMARY METAL PRODUCTS	13.1	9.1	100.0	100.0	100.0	100.0
FERROUS						
Pig iron, etc.	11.4	13.5	5.9	5.1	2.9	4.4
Ingots, etc.	16.5	2.4	4.7	6.3	2.7	1.4
Iron and steel bars, etc.	14.0	23.1	10.7	11.6	1.8	6.0
Universals, plates, etc.	15.5	14.7	16.5	20.4	4.8	8.0
Hoops and strips of iron and steel	16.1	7.8	2.1	2.7	0.4	0.3
Rails and railway tracks	16.8	50.5	0.3	0.4	..	0.8
Iron and steelwire	15.9	32.5	1.6	2.0	0.2	1.3
Tubes, pipes and fittings	16.0	23.3	6.5	8.4	1.5	5.2
Iron and steel castings	15.5	- 4.8	0.5	0.6	0.7	0.2
NON-FERROUS						
Silver, platinum	14.4	29.5	4.5	5.0	1.1	6.2
Copper	6.5	4.1	25.1	13.9	25.8	16.1
Nickel	10.1	6.2	4.1	3.1	21.8	16.6
Aluminum	16.3	6.6	8.9	11.8	26.8	21.3
Lead	12.1	13.2	1.7	1.6	2.3	3.3
Zinc	14.9	11.8	1.8	2.1	5.9	7.5
Tin	12.8	19.1	3.1	3.1	..	..
Uranium, thorium	15.0	15.9	..	..	..	..
Miscellaneous non-ferrous base metals	12.8	9.1	2.0	2.0	1.3	1.3

TABLE 5.11

PRIMARY METAL PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE OECD[1] (percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, PRIMARY METAL PRODUCTS	8.4	8.3	7.0	7.7	7.4	6.8	5.5	5.0	5.1	5.5	5.9
FERROUS											
Pig iron, etc.	4.2	4.4	4.1	4.3	4.2	4.9	4.2	3.5	3.5	4.6	5.0
Ingots, etc.	4.9	6.0	3.2	1.8	1.8	1.5	0.9	1.3	0.7	1.5	1.4
Iron and steel bars, etc.	1.4	1.8	1.6	2.6	2.1	1.9	1.5	1.5	1.5	2.1	3.0
Universals, plates, etc.	2.5	2.9	1.7	2.3	2.6	2.2	1.4	1.3	1.4	1.7	2.3
Hoops and strips of iron and steel	1.6	1.1	1.1	1.3	1.3	1.1	1.0	0.7	0.6	0.8	0.8
Rails and railway tracks	1.0	4.5	3.6	2.6	3.4	5.5	5.7	5.0	3.5	4.3	12.3
Iron and steelwire	1.0	1.5	1.3	1.3	1.8	2.4	2.9	3.6	2.5	2.9	3.8
Tubes, pipes and fittings	2.0	6.0	3.3	3.3	2.8	2.1	2.5	3.5	3.1	3.7	3.6
Iron and steel castings	12.9	9.4	8.7	4.3	2.6	3.0	2.9	2.8	2.4	1.3	1.9
NON-FERROUS											
Silver, platinum	2.1	0.9	6.8	5.3	4.0	2.5	2.5	3.6	4.1	5.7	7.2
Copper	8.6	8.2	6.2	7.9	9.3	9.0	7.8	7.1	7.2	7.7	6.8
Nickel	45.0	42.5	34.5	43.5	40.7	38.1	34.2	30.5	34.5	32.3	31.5
Aluminum	25.2	23.9	20.0	17.8	18.9	16.1	11.3	11.1	10.8	3.0	1.5
Lead	11.1	12.8	10.0	9.9	10.9	12.7	9.8	7.0	8.4	8.9	12.3
Zinc	27.8	25.3	26.4	27.0	23.5	25.0	24.2	17.1	21.9	23.3	21.2
Tin	..	..	..	0.1	0.3	0.2	..	0.1	..	..	..
Uranium, thorium	33.9	1.3	-	5.2	-	-	0.5	2.1	0.2	16.3	36.4
Miscellaneous non-ferrous base metals	5.3	6.5	4.7	3.9	2.5	3.0	2.7	2.1	2.5	3.0	3.8

[1] For source and notes see Table 2.8.

TABLE 5.12

PRIMARY METAL PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE U.S.A.[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
			Total U.S.A. Imports		Imports from Canada	
	Total U.S.A. Imports	Imports from Canada	1967	1977	1967	1977
TOTAL, PRIMARY METAL PRODUCTS	13.0	11.7	100.0	100.0	100.0	100.0
Ferrous						
Pig iron, etc.	20.1	10.1	2.9	5.3	3.7	3.2
Ingots, etc.	7.3	- 3.0	1.1	0.6	4.1	1.0
Iron and steel bars, etc.	11.5	25.4	13.1	11.5	2.2	7.1
Universals, plates, etc.	17.5	20.4	19.3	28.5	4.6	9.8
Hoops and strips of iron and steel	11.2	20.2	1.0	0.9	0.2	0.4
Rails and railway tracks	35.8	49.8	0.1	0.4	0.1	1.0
Iron and steelwire	13.0	33.4	2.9	2.9	0.3	1.7
Tubes, pipes and fittings	18.6	23.8	6.1	10.0	2.4	6.9
Iron and steel castings	11.1	- 4.9	0.3	0.3	1.2	0.2
Non-Ferrous						
Silver, platinum	20.9	29.4	2.9	5.7	1.8	8.0
Copper	2.5	1.9	22.4	8.4	22.8	9.1
Nickel	10.6	6.1	7.0	5.6	26.8	16.0
Aluminum	12.0	11.6	8.3	7.6	24.0	[illegible]
Lead	6.0	18.3	3.0	1.6	1.5	[illegible]
Zinc	20.4	21.9	2.0	3.8	3.4	[illegible]
Tin	10.8	17.6	5.7	4.7	..	..
Uranium, thorium	n.a.	n.a.	-	..	-	..
Miscellaneous non-ferrous base metals	14.2	12.3	1.9	2.2	0.9	1.0

TABLE 5.13

PRIMARY METAL PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE UNITED STATES[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, PRIMARY METAL PRODUCTS	22.9	21.3	23.2	24.0	21.5	21.6	20.5	16.8	18.7	20.9	20.4
Ferrous											
Pig iron, etc.	29.7	23.4	21.0	23.0	17.8	17.4	15.4	13.3	9.2	13.3	12.4
Ingots, etc.	87.3	79.1	79.7	67.3	46.7	38.5	36.2	59.1	18.3	34.9	31.8
Iron and steel bars, etc.	3.9	4.8	5.0	8.2	6.3	6.2	6.1	4.9	5.8	9.3	12.6
Universals, plates, etc.	5.5	6.4	5.6	7.9	6.8	5.8	5.2	4.6	5.4	6.2	7.0
Hoops and strips of iron and steel	4.7	3.5	4.2	6.0	5.4	6.6	9.1	9.3	6.9	10.7	10.2
Rails and railway tracks	19.5	54.5	46.0	34.5	62.2	64.5	76.3	57.1	23.3	35.7	52.1
Iron and steelwire	2.4	3.3	3.1	3.5	5.1	6.8	9.8	10.6	8.2	11.0	12.4
Tubes, pipes and fittings	9.1	22.0	13.0	13.2	11.6	9.4	14.6	17.3	14.3	17.2	14.0
Iron and steel castings	82.4	70.1	68.4	53.8	37.2	31.4	27.2	19.8	17.8	13.3	17.4
Non-Ferrous											
Silver, platinum	14.4	6.3	41.9	26.7	21.0	12.3	8.5	11.2	18.6	22.1	28.5
Copper	23.4	20.2	22.9	27.0	35.4	34.6	31.7	21.1	23.3	21.2	22.1
Nickel	88.1	87.6	83.3	85.4	83.4	75.4	64.2	62.1	69.5	67.2	58.3
Aluminum	66.2	62.4	72.7	66.9	64.7	62.6	67.9	66.5	63.1	54.6	63.7
Lead	10.9	18.0	15.7	26.1	28.6	35.1	35.6	32.6	31.1	34.9	32.7
Zinc	38.2	39.9	47.1	45.3	47.2	51.5	54.1	41.2	48.2	45.1	43.3
Tin	0.1	..	..	..	0.5	0.6	0.1	0.1	0.1	0.1	[illegible]
Uranium, thorium	-	100.0	-	-	-	-	100.0	74.0	100.0	100.0	[illegible]
Miscellaneous non-ferrous base metals	11.0	13.8	11.2	9.1	8.8	9.3	8.3	7.0	7.3	7.4	9.3

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1 For source and notes see Table 2.8.

TABLE 5.14

PRIMARY METAL PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE E.E.C.[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
	Total E.E.C. Imports	Imports from Canada	Total E.E.C. Imports 1967	Total E.E.C. Imports 1977	Imports from Canada 1967	Imports from Canada 1977
TOTAL, PRIMARY METAL PRODUCTS	11.7	3.7	100.0	100.0	100.0	100.0
FERROUS						
Pig iron, etc.	16.6	22.2	5.4	8.2	1.6	8.3
Ingots, etc.	18.3	18.2	4.0	7.0	1.0	3.8
Iron and steel bars, etc.	22.0	18.6	3.3	8.1	0.8	3.1
Universals, plates, etc.	21.8	- 3.2	4.8	11.4	4.2	2.1
Hoops and strips of iron and steel	17.2	-17.3	0.8	1.3	0.7	0.1
Rails and railway tracks	10.0	100.1	..	..	..	0.2
Iron and steelwire	18.0	-11.7	0.4	0.8	..	..
Tubes, pipes and fittings	17.7	14.7	2.8	4.6	0.2	0.6
Iron and steel castings	32.5	2.5	0.1	0.3	..	..
NON-FERROUS						
Silver, platinum	9.2	34.4	7.2	5.7	0.1	1.3
Copper	6.0	5.9	44.2	26.1	34.5	42.5
Nickel	10.6	5.8	3.9	3.5	15.0	18.4
Aluminum	11.8	-17.3	11.9	11.9	24.3	2.5
Lead	12.4	9.4	2.5	2.7	4.1	7.0
Zinc	6.8	- 0.1	2.6	1.7	11.1	7.7
Tin	16.7	31.5	2.6	4.1	..	..
Uranium, thorium	13.0	n.a.	..	..	..	-
Miscellaneous non-ferrous base metals	8.5	4.6	3.4	2.5	2.2	2.4

TABLE 5.15

PRIMARY METAL PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE E.E.C. (EXCLUDING INTRA-TRADE)[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, PRIMARY METAL PRODUCTS	10.1	8.8	7.2	10.0	9.1	7.2	6.4	6.0	5.6	5.4	4.8
FERROUS											
Pig iron, etc.	3.0	3.6	4.0	2.9	3.8	3.7	2.9	2.2	3.3	4.0	4.9
Ingots, etc.	2.6	4.1	0.6	0.7	0.2	1.1	1.0	1.8	1.3	4.0	2.6
Iron and steel bars, etc.	2.4	1.7	2.0	6.5	3.1	3.0	2.9	3.5	2.7	2.8	1.8
Universals, plates, etc.	8.9	4.0	1.8	2.6	2.0	3.0	1.8	0.9	0.4	1.4	0.9
Hoops and strips of iron and steel	8.4	4.8	5.7	5.6	5.4	3.2	2.7	1.1	1.1	0.5	0.3
Rails and railway tracks	0.1	-	0.2	1.8	7.1	0.7	0.3	32.8	13.6	0.1	31.5
Iron and steelwire	0.9	1.0	0.8	0.7	0.3	0.1	0.6	0.4	0.3	0.2	0.1
Tubes, pipes and fittings	0.8	0.9	0.4	0.4	0.7	0.7	0.3	0.5	1.0	0.8	0.6
Iron and steel castings	2.0	1.0	1.2	1.1	0.4	0.3	0.7	0.9	0.5	0.2	0.2
NON-FERROUS											
Silver, platinum	0.1	0.3	0.5	0.8	1.0	1.2	0.5	0.4	0.3	0.4	1.1
Copper	7.9	8.0	7.0	9.4	3.7	9.3	8.5	8.3	8.4	9.1	7.8
Nickel	38.8	34.5	21.8	43.5	37.2	26.5	28.5	23.1	29.9	22.8	25.1
Aluminum	20.7	17.2	13.9	16.9	13.7	9.5	7.7	9.8	3.9	2.0	1.0
Lead	16.2	14.7	12.4	9.7	10.7	12.2	11.5	8.3	9.3	8.0	12.4
Zinc	42.6	37.0	35.0	40.1	27.3	22.3	20.1	10.2	27.4	21.1	21.8
Tin	..	..	-	..	..	..	..	0.1	..	..	..
Uranium, thorium	89.0	-	-	37.3	-	-	2.8	-	-	32.7	-
Miscellaneous non-ferrous base metals	6.6	8.5	6.3	5.0	2.3	2.7	2.2	1.8	3.2	4.0	4.6

[1] For source and notes see Table 2.8.

CHAPTER VI

TRADE IN FABRICATED METAL PRODUCTS

CHAPTER VI
TRADE IN FABRICATED METAL PRODUCTS

6.1 CHARACTERISTICS OF THE DOMESTIC INDUSTRIES

The group of metal fabricating industries[1] consists of manufacturers producing intermediate as well as final products. The intermediate products which are further processed or assembled with various machinery and equipment often become an integral part of business structures or residential buildings. These industries account for boiler and plate works, fabricated structural metal, ornamental and architectural metal, metal stamping, wire and wire products. Final products of the metal fabricating group tend to be concentrated in heating equipment, hardware, tool and cutlery manufacturing.

Industrial concentration[2] within this group of industries is fairly low. In 1974, the weighted average of the leading four enterprises was about 32 percent of value added, considerably below the average for overall manufacturing. Boiler and plate works led in this respect as the leading eight enterprises account for about two thirds of value added or shipments and only slightly less of employment. Concentration in hardware, tool and cutlery, miscellaneous metal fabricating and in heating equipment is extremely low in comparison.

Foreign ownership[3], also in 1974, accounted for slightly more than 10 percent of all establishments, and was mainly held in the United States. This represented about 38 percent of shipments or value added and around 34 percent of employment.

Among manufacturing industry groups, metal fabricating ranked sixth in value of factory shipments in 1978 with $8.7 billion. As indicated in the following table, this industry group accounted for only 1.6 percent of total manufacturing exports in 1978, and thus did not contribute as much to foreign trade as its share of total manufacturing activity would appear to warrant.

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1 1970 SIC codes 301 to 309

2 See corresponding notes on page 23.

3 See corresponding notes on page 23.

TABLE 6.1

METAL FABRICATING INDUSTRIES

SELECTED INDICATORS

	1967	1978	Average Annual Rate of Growth 1967-1978	1978 Share of Total Manufacturing Activity
			(percent)	
REAL DOMESTIC PRODUCT (Constant $, millions)	1,458.1	1,982.0	2.8	7.8
SHIPMENTS ($ millions)	2,732	8,664	11.1	6.6
DOMESTIC EXPORTS ($ millions)	82	590	19.7	1.6
IMPORTS LESS RE-EXPORTS ($ millions)	386	1,474	12.9	3.7
EMPLOYMENT (000's)	119	125	0.4	7.8
PROFITS ($ millions)	213	838	13.3	6.4
INVESTMENT ($ millions)	164.6	344.7	7.0	3.6

Source: See Table 2.1.

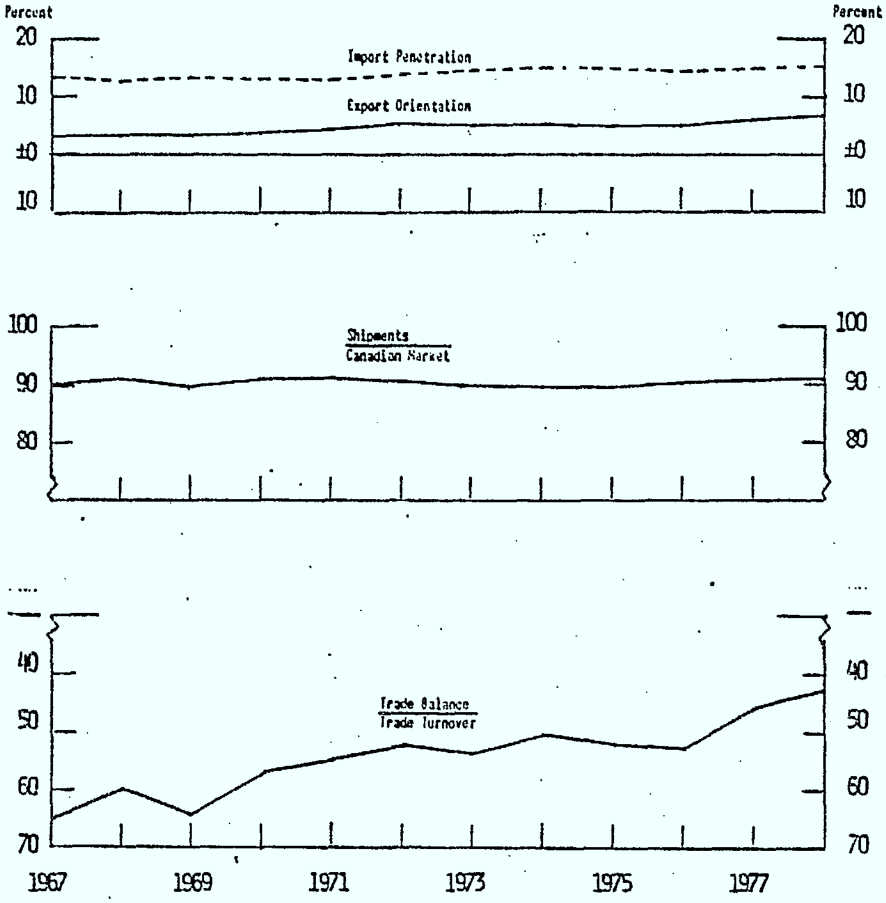
6.2 TRADE DEVELOPMENTS, 1967 to 1978

As is apparent in Table 6.1, metal fabricating imports were consistently and substantially greater than exports throughout the period under review. Over time, however, there was a relative improvement in this situation as metal fabricated exports assumed a progressively larger share of factory shipments, and grew more rapidly than imports. This consequently led to a much smaller normalized trade deficit for the sector as a whole, and without any deterioration in the ratio of shipments to the domestic market which remained remarkably constant over the entire period at around 90 percent of domestic requirements. As can be seen in Chart 6.1, none of the trade measures for this group of industries are particularly sensitive to cyclical influences from abroad. The products (e.g. bridges, industrial heating components) are usually heavy and bulky and are often built to user specifications, one of a kind and to be assembled on site. Thus the existing trade is limited only to some product lines where transportation, servicing or other aspects of installation do not pose a problem, or where it is a part of large turn-key projects.

Domestic exports of the metal fabricating industries increased close to 20 percent annually over the period under review to a value of $590 million in 1978. Export orientation, only 3 percent in the beginning of the period, advanced to about 7 percent by 1978.

CHART 6.1

METAL FABRICATING INDUSTRIES: SELECTED TRADE MEASURES



The apparent stability at the overall group level is, however, only partially reflected in the development of the individual industries (see Tables 6.3 to 6.5). A common characteristic of the industries is their historically low export orientation of shipments. Only in the 1970's did this measure rise above 10 percent. One small sub-sector, namely boiler and plate works, emerged as a small export surplus producer. Export orientation doubled to about 11 percent in 1977 but subsided in 1978. At the same time, import penetration declined and the ratio of shipments to the domestic market indicated a moderate export surplus (Tables 6.4 and 6.5). In other sectors, e.g. wire and wire products, and hardware, tools and cutlery, the strength in exports was not enough to offset the continuing strength in imports. Nevertheless, their export growth provided a stimulus to Canadian production.

TABLE 6.2

METAL FABRICATING INDUSTRIES: TRADE MEASURES, 1967 TO 1978

YEAR	DOMESTIC EXPORTS	ADJUSTED IMPORTS[1]	TRADE BALANCE	TRADE TURNOVER (EXPORTS + IMPORTS)	CANADIAN FACTORY SHIPMENTS	CANADIAN MARKET[2]	TRADE BALANCE / TRADE TURNOVER	SHIPMENTS / CANADIAN MARKET	EXPORT ORIENTATION	IMPORT PENETRATION
	(MILLIONS OF DOLLARS)						(PERCENT)			
1967	82	386	-304	468	2,732	3,037	-65.1	90.0	3.0	12.7
1968	100	396	-296	495	2,900	3,196	-59.8	90.7	3.4	12.4
1969	103	471	-368	573	3,162	3,530	-64.2	89.6	3.2	13.3
1970	127	465	-338	592	3,357	3,695	-57.1	90.9	3.8	12.6
1971	146	503	-356	649	3,535	3,892	-54.9	90.8	4.1	12.9
1972	187	597	-410	784	3,822	4,232	-52.3	90.3	4.9	14.1
1973	220	732	-512	952	4,539	5,051	-53.8	89.9	4.8	14.5
1974	323	978	-655	1,301	5,834	6,489	-50.3	89.9	5.5	15.1
1975	326	1,043	-717	1,369	6,217	6,934	-52.4	89.7	5.2	15.0
1976	346	1,103	-757	1,449	6,813	7,570	-52.3	90.0	5.1	14.6
1977	466	1,261	-795	1,727	7,482	8,277	-46.0	90.4	6.2	15.2
1978	590	1,474	-883	2,064	8,664	9,547	-42.8	90.7	6.8	15.4

[1]Total imports less re-exports; [2]Shipments plus imports less exports.

Three metal fabricating industries, accounting for more than 60 percent of Canadian output in 1978, experienced very small export sales and imports only rarely exceeded a tenth of the domestic market. These included producers of fabricated structural metal, metal stamping and pressing, and the various manufacturers of heating equipment.

Developments in these industries over the time show no major change. Both exports and imports grew at a slower rate than for the sector as a whole, especially for heating equipment. The products (e.g. bridge, industrial heating components) are usually heavy and bulky and are often built to user specifications, as one of a kind items to be assembled on site. Thus the existing trade is limited to only certain product lines where transportation, servicing or other aspects of installation do not pose a problem.

As in other sectors of manufacturing, some metal fabricating user industries show a definite propensity to import. Wire and wire products, hardware, tools and cutlery, and miscellaneous metal fabricating could all be placed into this category.

Wire and wire products actually experienced an above-average growth in exports of 24 percent annually between 1967 and 1978 and their export orientation more than tripled in this period. While this led to an improvement in the ratio of shipments to the domestic market, (Table 6.4) import penetration nevertheless rose quite substantially. Miscellaneous metal fabricating had the opposite experience, a gradual decline in the ratio of shipments to the domestic market in spite of its increasing trade interdependence. Here imports were close to a quarter of the domestic market at the beginning of the period, increased to less than a third by 1975-77 and markedly outweighed the more slowly rising exports of this sub-sector. Although export growth was more than 5 percentage points faster than that of imports, it was from a much smaller base.

In hardware, tools and cutlery products, Canada shows a persistent import gap of 25-28 percent. In the 1960's, export orientation rose gradually and assisted in raising the ratio of shipments to the domestic market. In the seventies, however, import gains relative to exports, reduced this measure of implicit self-sufficiency.

TABLE 6.3

METAL FABRICATING INDUSTRIES: EXPORTS AND EXPORT ORIENTATION BY INDUSTRY, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
	(MILLIONS OF DOLLARS)											
DOMESTIC EXPORTS												
TOTAL	82	100	103	127	146	187	220	323	326	346	466	590
BOILER & PLATE WORKS	9	15	7	15	19	27	12	19	31	38	68	50
STRUCT., ORNAM. & ARCHIT. FABRICATING	2	2	2	3	4	5	5	7	9	8	9	19
STAMPING, PRESSING & COATING	7	9	12	12	8	13	17	22	14	22	32	43
WIRE & PRODUCTS MFRS.	22	32	32	38	50	61	86	146	111	132	176	239
HARDWARE, TOOL & CUTLERY MFRS.	18	19	22	26	29	38	49	60	54	59	75	94
HEATING EQUIPMENT MFRS.	4	3	4	5	4	4	4	6	6	7	8	10
MISC. METAL FABRICATING	19	19	23	27	33	40	47	63	101	78	98	135
EXPORT ORIENTATION	(PERCENT)											
TOTAL	3.0	3.4	3.2	3.8	4.1	4.9	4.8	5.5	5.2	5.1	6.2	6.8
BOILER & PLATE WORKS	6.4	9.3	4.2	8.1	8.9	10.9	4.8	6.6	7.2	7.2	11.1	7.7
STRUCT., ORNAM. & ARCHIT. FABRICATING	0.4	0.4	0.4	0.4	0.6	0.6	0.5	0.5	0.6	0.5	0.5	1.1
STAMPING, PRESSING & COATING	0.9	1.2	1.4	1.4	0.9	1.3	1.5	1.6	1.0	1.3	1.7	1.9
WIRE & PRODUCTS MFRS.	6.1	8.2	7.4	8.6	10.4	10.8	12.4	15.2	12.7	14.5	17.1	18.2
HARDWARE, TOOL & CUTLERY MFRS.	8.2	7.7	8.9	9.7	10.2	11.3	11.7	11.9	10.3	10.3	11.7	11.4
HEATING EQUIPMENT MFRS.	4.0	3.0	3.5	4.1	3.2	3.4	3.0	4.0	3.7	3.7	4.0	4.8
MISC. METAL FABRICATING	4.7	4.5	5.1	5.7	6.4	7.2	6.9	7.3	10.8	7.9	9.2	11.4

TABLE 6.4

METAL FABRICATING INDUSTRIES: SHIPMENTS AND IMPLICIT SELF-SUFFICIENCY[1] BY INDUSTRY, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
	(MILLIONS OF DOLLARS)											
FACTORY SHIPMENTS												
TOTAL	2,732	2,900	3,162	3,357	3,535	3,822	4,539	5,834	6,217	6,813	7,482	8,664
BOILER & PLATE WORKS	138	163	165	179	209	245	257	296	430	535	614	646
STRUCT., ORNAM. & ARCHIT. FABRICATING	597	611	678	766	781	820	1,015	1,413	1,538	1,566	1,695	1,722
STAMPING, PRESSING & COATING	712	771	840	868	919	972	1,143	1,381	1,462	1,718	1,874	2,273
WIRE & PRODUCTS MFRS.	367	388	431	442	479	561	691	960	875	911	1,031	1,312
HARDWARE, TOOL & CUTLERY MFRS.	223	242	251	274	280	334	418	500	523	579	639	821
HEATING EQUIPMENT MFRS.	108	115	119	118	125	114	127	158	164	196	196	216
MISC. METAL FABRICATING	396	422	454	478	514	558	675	858	928	995	1,062	1,191
SHIPMENTS/CANADIAN MARKET	(PERCENT)											
TOTAL	90.0	90.7	89.6	90.9	90.8	90.3	89.9	89.9	89.7	90.0	90.4	90.7
BOILER & PLATE WORKS	97.5	100.9	94.1	100.4	101.2	102.8	97.4	98.1	100.0	102.0	105.3	101.8
STRUCT., ORNAM. & ARCHIT. FABRICATING	97.0	97.5	97.6	97.6	97.8	97.3	98.1	97.6	97.5	97.8	97.9	98.8
STAMPING, PRESSING & COATING	94.9	95.3	95.1	95.2	94.1	94.0	93.7	92.8	92.9	93.3	93.4	94.0
WIRE & PRODUCTS MFRS.	86.8	87.3	84.2	86.7	89.2	89.5	90.6	92.5	88.9	91.0	90.8	95.0
HARDWARE, TOOL & CUTLERY MFRS.	74.0	74.9	73.5	76.2	75.8	74.9	75.2	72.8	73.9	73.7	74.0	75.0
HEATING EQUIPMENT MFRS.	96.9	97.3	97.3	97.6	95.7	94.2	91.0	93.5	94.9	96.9	96.7	95.7
MISC. METAL FABRICATING	78.8	80.4	78.7	80.0	79.7	79.1	78.3	78.7	77.9	76.4	76.6	76.0

1 Ratio of shipments to Canadian market

TABLE 6.5

METAL FABRICATING INDUSTRIES: IMPORTS AND IMPORT PENETRATION BY INDUSTRY, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
					(MILLIONS OF DOLLARS)							
ADJUSTED IMPORTS												
TOTAL	386	396	471	465	503	597	732	978	1,043	1,103	1,261	1,474
BOILER & PLATE WORKS	12	14	17	14	16	20	19	25	31	28	37	39
STRUCT., ORNAM. & ARCHIT. FABRICATING	21	18	19	22	22	28	25	41	49	43	45	40
STAMPING, PRESSING & COATING	45	48	55	56	66	75	93	129	126	145	164	187
WIRE & PRODUCTS MFRS.	78	88	113	106	107	126	157	224	220	223	280	308
HARDWARE, TOOL & CUTLERY MFRS.	97	100	113	112	118	150	187	246	238	268	299	368
HEATING EQUIPMENT MFRS.	8	7	7	8	10	11	16	17	15	13	15	20
MISC. METAL FABRICATING	125	122	146	147	164	187	234	296	364	385	421	512
IMPORT PENETRATION					(PERCENT)							
TOTAL	12.7	12.4	13.3	12.6	12.9	14.1	14.5	15.1	15.0	14.6	15.2	15.4
BOILER & PLATE WORKS	8.8	8.5	9.9	7.8	7.8	8.4	7.3	8.4	7.2	5.3	6.4	6.1
STRUCT., ORNAM. & ARCHIT. FABRICATING	3.4	2.9	2.8	2.8	2.7	3.3	2.4	2.9	3.1	2.7	2.6	2.3
STAMPING, PRESSING & COATING	6.0	5.9	6.2	6.1	6.8	7.3	7.7	8.7	8.0	7.9	8.2	7.7
WIRE & PRODUCTS MFRS.	18.5	19.9	22.1	20.8	20.0	20.2	20.6	21.6	22.4	22.3	24.7	22.3
HARDWARE, TOOL & CUTLERY MFRS.	32.1	30.9	33.1	31.2	31.9	33.6	33.6	35.9	33.7	33.8	34.6	33.6
HEATING EQUIPMENT MFRS.	7.0	5.7	6.1	6.4	7.3	9.0	11.7	10.3	8.6	6.6	7.3	8.9
MISC. METAL FABRICATING	24.9	23.2	25.3	24.6	25.4	26.6	27.2	27.1	30.6	29.6	30.4	32.7

6.3 CANADA'S SHARE OF OECD IMPORTS 1967 TO 1977

Canada exported $661 million U.S. of metal fabricated products to the OECD in 1977 representing 3.7 percent of its total imports of almost $18 billion U.S. (Table 6.6).

Throughout the period West Germany and the United States were the leading OECD suppliers of metal fabricated products. West Germany's share remained relatively constant over the period although the final three years demonstrated a slight decline. The United States suffered a decline in market share of almost 40 percent, ending the period with only 11.5 percent of the total market. The United Kingdom, which began the period as the third largest supplier, ended it tied for third with Japan. While Japan increased its share by 17 percent the United Kingdom's share was reduced by almost 30 percent. Significant gains were made by the other developing economies which more than tripled their market share from 1.2 percent to 4.2 percent.

Canada ended the period with a market share only marginally higher than it had at the beginning. Significant gains were made from 1968 to 1970; however, they were not sustained. Canada's share of the U.S. market, which accounted for 69.1 percent of its total and 85 percent of its OECD exports (Table 6.7), increased over the period. The high levels reached from 1968 to 1971 account for Canada's higher overall market share during this period. Canada made a major increase in the Japanese market ending the period with a 3.9 percent market share after beginning it with only 0.8 percent. Canada's overall market share did not generally increase, due to a halving of its EEC share (Table 6.9).

Three groups of commodities represent almost 76 percent of OECD imports from Canada of metal fabricated products - including manufactures of metal n.e.s.; nails, screws, etc; taps, cocks, valves, etc. (Table 6.10). OECD imports from Canada of these commodities have grown more quickly than their total OECD imports. These commodities have also been among the fastest growing of the OECD metal fabricating imports.

TABLE 6.6

METAL FABRICATED PRODUCTS: OECD IMPORTS BY SOURCE[1]

DISTRIBUTION AND AVERAGE ANNUAL RATE OF CHANGE

	DISTRIBUTION percent											Percent Change
	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1967-1977
Total Imports	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	
Developed Market Economies												
West Germany	23.2	23.1	23.3	23.6	23.8	23.2	24.1	23.4	22.7	22.4	22.5	- 0.3
United States	18.8	18.6	17.1	15.1	13.4	12.6	11.6	12.0	12.7	12.9	11.5	- 4.8
United Kingdom	10.8	9.6	9.5	9.1	9.4	8.6	7.7	7.5	8.0	7.1	7.7	- 3.3
Japan	6.6	7.0	7.1	7.5	7.4	8.5	7.9	8.8	7.2	7.5	7.7	1.6
France	5.2	4.7	4.6	5.4	6.2	6.4	6.8	6.5	7.2	6.6	7.2	3.3
Italy	6.1	6.2	6.2	6.1	6.5	6.9	6.6	6.2	6.5	6.4	6.9	1.2
Belgium-Luxembourg	5.3	5.4	5.3	5.3	5.1	5.4	5.5	5.4	5.2	5.3	5.2	- 0.2
Netherlands	3.6	3.5	3.8	4.0	4.4	4.5	4.8	4.7	4.6	4.6	4.3	1.8
Sweden	4.9	4.4	4.3	4.6	4.5	4.3	4.6	4.4	4.9	4.5	4.2	- 1.5
Canada	3.4	4.3	4.5	4.3	3.9	3.7	3.5	3.6	3.3	3.5	3.7	0.8
Total EEC (9)	56.3	54.8	54.9	55.6	57.7	57.3	47.8	55.9	56.7	55.0	56.4	..
Other Developed Market Economies	6.9	7.3	8.7	9.4	9.5	9.3	9.7	10.1	10.1	10.2	10.1	3.9
OPEC	0.1	..	..	..	0.1	..	0.1	0.1	0.1	0.1	0.1	..
Other Developing Market Economies	1.2	1.5	1.4	1.7	1.4	2.3	2.8	3.4	3.1	4.2	4.6	14.4
Centrally Planned Economies	1.8	2.0	1.7	1.8	2.3	2.0	2.2	1.8	2.0	2.1	1.8	..
ADDENDUM												
Total Imports in Millions of U.S. Dollars	3,633	4,086	4,901	5,935	6,663	7,8"9	10,287	13,283	14,164	15,627	17,959	

TABLE 6.7

METAL FABRICATED PRODUCTS: PERCENTAGE OF CANADA'S EXPORTS BY DESTINATION[2]

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	OECD Share 1977
O.E.C.D.	80.8	84.2	86.8	84.9	83.4	78.6	87.0	87.0	78.9	81.1	87.0	100.0
United States	59.1	62.8	71.4	65.0	65.9	65.6	74.9	76.1	68.3	69.1	69.1	85.3
Japan	0.6	0.5	0.3	0.5	1.5	1.4	1.5	1.3	1.4	1.6	1.2	1.5
E.E.C. (9)	11.8	8.2	8.0	9.7	7.8	6.8	6.4	4.9	4.7	5.0	4.6	5.7
United Kingdom	8.4	5.8	4.9	5.8	4.7	4.7	4.3	3.0	2.9	2.3	1.9	2.3
Rest of World	19.2	15.8	13.2	15.1	16.6	21.4	13.0	13.0	21.1	18.9	19.0	

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1 For source and notes see Table 2.6.

2 For source and notes see Table 2.7.

TABLE 6.8

METAL FABRICATED PRODUCTS: GROWTH OF FOREIGN IMPORTS[1]

(percent)

	OECD	U.S.A.	JAPAN	EEC (9)*	OTHER OECD	DEVELOPING COUNTRIES**
1967	-	-	-	-	-	-
1968	12.5	28.9	9.7	16.2	8.2	11.0
1969	20.0	20.2	32.4	17.9	20.1	8.3
1970	21.1	16.0	43.3	17.5	22.6	14.3
1971	12.2	0.9	- 3.1	7.2	16.6	11.6
1972	17.2	33.2	13.6	16.1	14.2	8.4
1973	31.7	22.9	59.9	37.3	32.0	19.6
1974	29.1	44.2	45.8	26.6	25.7	53.0
1975	6.6	-11.4	-16.6	13.6	10.7	53.6
1976	10.3	14.0	14.5	13.4	8.8	14.5
1977	14.9	20.2	-1.9	13.3	14.6	29.5

TABLE 6.9

METAL FABRICATED PRODUCTS: CANADA'S TRADE SHARE BY MARKET[1]

(percent)

1967	3.4	17.6	0.8	2.8	0.5	1.9
1968	4.3	21.2	0.5	2.4	0.5	1.3
1969	4.5	23.2	0.5	2.2	0.4	1.1
1970	4.3	22.5	0.8	2.4	0.4	1.5
1971	3.9	22.1	1.8	2.5	0.3	1.5
1972	3.7	18.9	2.7	2.4	0.3	2.3
1973	3.5	19.4	2.4	1.8	0.2	1.5
1974	3.6	17.9	2.3	1.6	0.3	1.3
1975	3.3	19.6	2.6	1.6	0.2	1.6
1976	3.5	20.6	3.0	1.4	0.3	2.1
1977	3.7	20.3	3.9	1.4	0.3	1.8

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1 For source and notes see Table 2.8.

TABLE 6.10

METAL FABRICATED PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE OECD[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
	Total OECD Imports	Imports from Canada	Total OECD Imports 1967	Total OECD Imports 1977	Imports from Canada 1967	Imports from Canada 1977
TOTAL, METAL FABRICATED PRODUCTS	17.3	18.4	100.0	100.0	100.0	100.0
Finished structural parts	20.5	19.7	6.7	8.8	3.5	3.9
Metal containers	18.6	24.4	4.0	4.4	2.1	3.4
Wire products	16.2	15.3	5.3	4.8	3.8	2.9
Nails, screws, etc.	18.7	23.9	8.8	9.8	11.5	18.1
Hand/machine tools	17.2	10.7	14.3	14.2	9.5	4.8
Cutlery	14.6	19.7	5.1	4.0	1.7	1.9
Domestic utensils	18.4	15.3	4.0	4.4	1.4	1.0
Other household equipment	23.6	34.1	0.5	0.9	..	0.1
Manufactures of metal, n.e.s.	17.6	18.4	23.8	24.4	45.6	45.5
Steam generating boilers	13.9	21.5	2.0	1.5	3.1	4.1
Boiler house plant	9.9	13.9	0.9	0.5	0.2	0.1
Taps, cocks, valves, etc.	18.4	23.2	12.6	13.8	8.4	12.5
Central heating apparatus	18.8	- 5.9	2.6	3.0	0.5	..
Sinks, wash basins, etc.	16.4	41.1	0.9	0.8	..	0.1
Non-military arms	13.7	21.9	1.8	1.3	0.4	0.6
Military arms	9.6	- 5.4	6.7	3.4	8.3	0[illegible]

TABLE 6.11

METAL FABRICATED PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE OECD[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, METAL FABRICATED PRODUCTS	3.4	4.3	4.5	4.3	3.9	3.7	3.5	3.6	3.3	3.5	3.7
Finished structural parts	1.7	3.5	5.6	7.1	5.0	3.4	2.2	2.5	2.4	1.4	1.6
Metal containers	1.8	4.2	4.2	3.8	1.7	2.2	3.2	3.4	2.2	2.3	2.8
Wire products	2.4	2.2	1.9	2.6	2.4	2.3	2.5	2.7	2.1	2.4	2.2
Nails, screws, etc.	4.4	5.7	4.7	4.4	5.8	6.2	5.9	6.3	5.6	6.6	6.8
Hand/machine tools	2.2	2.4	2.1	2.1	1.6	1.7	1.5	1.8	1.6	1.3	1.3
Cutlery	1.1	0.9	0.9	0.9	1.3	1.4	1.3	1.3	1.4	1.7	1.7
Domestic utensils	1.2	0.9	1.1	1.5	2.4	2.2	1.3	1.3	0.9	1.0	0.9
Other household equipment	0.1	0.2	0.1	0.4	0.2	0.2	0.2	0.4	0.5	0.3	0.3
Manufactures of metal, n.e.s.	6.5	7.9	7.1	6.2	6.2	6.8	6.6	5.9	5.9	6.9	6.9
Steam generating boilers	5.3	1.9	2.0	4.4	6.2	4.2	3.0	3.7	3.2	6.1	10.1
Boiler house plant	0.6	10.2	3.6	11.7	5.3	1.5	2.9	2.1	1.4	1.4	0.8
Taps, cocks, valves, etc.	2.3	2.5	2.5	3.2	3.2	2.8	2.5	2.4	2.3	2.8	3.4
Central heating apparatus	0.6	0.3	0.3	0.2	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Sinks, wash basins, etc.	0.1	0.1	0.2	0.2	0.3	0.3	0.2	0.3	0.5	0.6	0.6
Non-military arms	0.8	1.5	1.8	1.4	1.5	1.7	1.9	2.2	2.4	2.2	1.6
Military arms	4.2	7.3	14.2	10.7	5.1	3.3	3.9	4.2	3.3	2.0	1.0

1 For soure and notes see Table 2.8.

TABLE 6.12

METAL FABRICATED PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE U.S.A.[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
			Total U.S.A. Imports		Imports from Canada	
	Total U.S.A. Imports	Imports from Canada	1967	1977	1967	1977
TOTAL, METAL FABRICATED PRODUCTS	17.9	19.7	100.0	100.0	100.0	100.0
Finished structural parts	23.2	20.7	2.0	3.0	3.5	3.8
Metal containers	23.1	25.2	1.4	2.2	2.5	3.9
Wire products	17.3	17.3	10.7	10.1	4.1	3.4
Nails, screws, etc.	18.8	24.7	19.7	21.3	13.5	20.5
Hand/machine tools	18.3	15.9	10.9	11.3	4.6	3.4
Cutlery	15.9	25.2	8.5	7.1	0.1	0.2
Domestic utensils	16.0	31.1	7.1	6.0	0.3	0.7
Other household equipment	n.a.	n.a.	-	..	-	..
Manufactures of metal, n.e.s.	18.7	18.9	25.0	26.8	53.7	50.2
Steam generating boilers	23.4	18.7	0.4	0.7	1.1	1.0
Boiler house plant	n.a.	n.a.	-	0.1	-	0.1
Taps, cocks, valves, etc.	26.9	25.6	3.9	8.1	7.1	11.5
Central heating apparatus	-	-	-	-	-	-
Sinks, wash basins, etc.	n.a.	n.a.	-	0.1	-	0.1
Non-military arms	8.9	19.5	5.0	2.3	0.4	0.4
Military arms	- 1.8	- 5.1	5.3	0.9	9.1	0.9

TABLE 6.13

METAL FABRICATED PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE UNITED STATES[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, METAL FABRICATED PRODUCTS	17.6	21.2	23.2	22.5	22.1	18.9	19.4	17.9	19.6	20.6	20.3
Finished structural parts	31.3	47.3	69.6	80.2	63.2	54.3	55.2	51.6	46.2	21.2	25.6
Metal containers	31.1	44.5	61.1	47.7	27.3	39.5	54.5	50.5	36.5	33.1	36.6
Wire products	6.7	6.4	6.3	7.9	8.0	6.5	6.7	6.6	6.6	7.7	6.7
Nails, screws, etc.	12.1	15.2	13.2	13.0	18.7	16.9	16.7	14.4	17.8	19.2	19.6
Hand/machine tools	7.4	8.6	8.4	7.6	8.1	6.9	7.3	8.4	7.8	5.7	6.1
Cutlery	0.3	0.6	0.8	0.3	0.2	0.3	0.4	0.1	0.2	0.1	0.6
Domestic utensils	0.7	1.2	2.3	3.3	6.7	5.6	3.4	2.9	2.6	2.2	2.2
Other household equipment	-	2.3	1.5	0.3	0.9	2.1	4.6	4.2	3.3	6.3	11.1
Manufactures of metal, n.e.s.	37.8	41.2	37.7	36.7	37.1	33.4	35.9	34.5	32.4	38.6	38.2
Steam generating boilers	43.3	48.6	15.4	17.3	20.7	23.0	40.9	20.7	36.6	57.9	29.3
Boiler house plant	-	68.6	77.7	91.3	67.8	70.7	57.5	13.5	28.4	17.1	14.9
Taps, cocks, valves, etc.	32.3	30.3	28.6	40.5	36.8	32.4	32.3	25.9	19.8	27.1	29.1
Central heating apparatus	-	-	-	-	-	-	-	-	-	-	-
Sinks, wash basins, etc.	-	2.2	2.8	7.7	12.3	8.9	6.9	9.9	31.3	22.1	23.4
Non-military arms	1.3	2.5	3.3	2.1	2.5	2.8	4.5	5.4	5.4	4.0	3.4
Military arms	30.0	39.6	69.7	69.7	45.1	34.0	40.0	40.6	43.1	34.2	21.1

1 For source and notes see Table 2.8.

TABLE 6.14

METAL FABRICATED PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE E.E.C.[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
	Total E.E.C. Imports	Imports from Canada	Total E.E.C. Imports 1967	Total E.E.C. Imports 1977	Imports from Canada 1967	Imports from Canada 1977
TOTAL, METAL FABRICATED PRODUCTS	17.7	10.0	100.0	100.0	100.0	100.0
Finished structural parts	21.0	12.1	3.9	5.1	4.8	5.8
Metal containers	18.8	5.9	2.4	2.7	0.8	0.6
Wire products	13.8	-18.7	1.5	1.1	3.2	0.2
Nails, screws, etc.	19.2	10.9	7.0	7.9	4.0	4.3
Hand/machine tools	19.6	3.5	19.7	23.2	31.4	16.9
Cutlery	18.6	-12.4	4.9	5.2	2.9	0.3
Domestic utensils	22.0	11.6	3.6	5.1	3.1	3.5
Other household equipment	25.0	32.5	0.9	1.6	0.1	0.8
Manufactures of metal, n.e.s.	19.5	12.8	18.7	21.9	23.4	29.9
Steam generating boilers	7.5	-29.8	1.1	0.5	3.1	..
Boiler house plant	6.8	-20.6	0.5	0.2	0.1	..
Taps, cocks, valves, etc.	16.8	17.4	15.9	14.8	17.8	34.2
Central heating apparatus	12.6	- 4.7	3.0	1.9	3.1	0.7
Sinks, wash basins, etc.	14.8	20.4	1.4	1.1	0.1	0.2
Non-military arms	21.3	17.9	1.0	1.4	0.5	[illegible]
Military arms	8.3	8.9	14.6	6.4	1.5	[illegible]

TABLE 6.15

METAL FABRICATED PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE E.E.C. (EXCLUDING INTRA-TRADE)[1] (percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, METAL FABRICATED PRODUCTS	2.8	2.4	2.2	2.4	2.5	2.4	1.8	1.6	1.6	1.4	1.4
Finished structural parts	3.5	5.0	4.4	4.4	5.6	4.5	3.8	3.9	3.2	1.6	1.6
Metal containers	1.0	2.2	0.6	1.4	0.7	0.4	0.4	0.7	0.3	0.5	0.3
Wire products	6.1	6.1	2.3	7.3	4.5	2.3	0.7	1.0	0.6	1.8	0.2
Nails, screws, etc.	1.6	1.5	1.0	1.5	1.1	1.1	0.9	1.0	1.0	1.0	0.8
Hand/machine tools	4.5	3.3	2.4	3.0	1.9	1.8	1.4	1.8	1.3	1.3	1.1
Cutlery	1.7	2.2	2.1	2.1	0.3	0.2	0.2	0.1	0.1	..	0.1
Domestic utensils	2.4	1.5	0.8	1.1	1.4	1.2	1.2	1.5	0.8	1.2	1.0
Other household equipment	0.4	0.6	0.5	1.7	0.8	0.7	0.6	1.6	1.9	1.0	0.8
Manufactures of metal, n.e.s.	3.5	4.1	2.9	2.5	2.6	4.0	3.1	2.0	2.0	1.8	2.0
Steam generating boilers	7.9	0.1	0.2	10.5	10.5	7.6	1.6	2.0	0.1	0.2	0.1
Boiler house plant	0.4	0.6	-	1.6	0.1	0.3	0.3	0.3	0.2	-	..
Taps, cocks, valves, etc.	3.2	2.7	3.7	2.8	4.3	3.1	2.5	1.8	2.6	2.5	3.3
Central heating apparatus	2.9	1.1	1.2	1.1	0.9	0.9	0.8	1.0	1.2	0.8	0.6
Sinks, wash basins, etc.	0.2	0.2	0.4	0.2	0.2	0.2	0.3	0.7	0.4	0.4	0.3
Non-military arms	1.5	2.1	0.8	2.3	2.5	2.1	1.3	1.1	2.6	2.9	1.1
Military arms	0.3	0.2	0.5	0.8	1.1	0.3	0.5	0.1	0.3	0.4	0.3

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1 For source and notes see Table 2.8.

CHAPTER VII

TRADE IN MACHINERY

CHAPTER VII
TRADE IN MACHINERY

7.1 CHARACTERISTICS OF THE DOMESTIC INDUSTRIES

The machinery industries group[1] is broadly divided into: industries producing agricultural implements, including tractors; miscellaneous machinery and equipment; commercial refrigeration and air conditioning; and office and store machinery. About two-thirds of production is concentrated in miscellaneous machinery industries supplying capital goods to most goods producing sectors of the Canadian economy except agriculture. The agricultural implement industry is second in size and accounts for about a fifth of the group's total production. Office and store machinery manufacturers hold about 9 percent of production and commercial refrigeration and air conditioning about 5 percent.

The industrial concentration[2] for this group of industries as a whole is not available, but an inspection of component sub-groups reveals a fairly high concentration in the agricultural implement industry and office and store machinery. On the other hand, miscellaneous machinery and equipment manufacturers have a very low concentration. Foreign ownership[3] for the group as a whole was close to 27 percent of establishments and slightly less than two-thirds of shipments or value added in 1974. About 62 percent of employees work for foreign owned establishments, with approximately a half in U.S. owned companies.

The machinery sector ranked tenth among the major manufacturing groups in terms of its production in 1978. The value of factory shipments of $4.9 billion accounted for a 3.8 percent share of overall manufacturing. At the same time, however, the group's highly developed trade patterns and specialized nature of production give it greater importance in trade than its share of manufacturing production would suggest. Both production and trade of the machinery sector is very strongly influenced by business investment activities at home and abroad. As in other capital goods sectors, its industries often incorporate very high degrees of technological content and sophistication in their production processes and products. These reflect current technological capabilities as well as innovations and advances in the various specialized areas of production. New processes and products affect an existing efficiency of production and encourage, through simplification, mechanization and automation an increased scale of production, cost reduction and gains in competitiveness. As a result, trade in machinery and equipment is a carrier of technological transfers, is very specialized

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1 1970 SIC codes 311 to 318

2 See corresponding notes on page 23.

and very highly developed. Thus, exports of machinery and equipment held a 7.4 percent share of manufactured goods exports in 1978 and imports amounted to more than 17 percent of all imported manufactured products. Table 7.1 shows these and other economic indicators linking the group to overall manufacturing. It is worth noting that trade (both exports and imports) rose faster than output (shipments) and that employment growth was minimal in relation to the real domestic product in the same period.

TABLE 7.1

MACHINERY INDUSTRIES

SELECTED INDICATORS

	1967	1978	Average Annual Rate of Growth 1967-1978	1978 Share of Total Manufacturing Activity
			(percent)	
REAL DOMESTIC PRODUCT (Constant $, millions)	710.9	1,247.7	5.3	4.9
SHIPMENTS ($ millions)	1,517	4,939	11.3	3.8
DOMESTIC EXPORTS ($ millions)	548	2,618	15.3	6.7
IMPORTS LESS RE-EXPORTS ($ millions)	1,751	6,915	13.3	16.8
EMPLOYMENT (000's)	72	75	0.4	4.7
PROFITS ($ millions)	207	389	5.9	3.0
INVESTMENT ($ millions)	82.2	191.7	8.0	2.0

Source: See Table 2.1.

7.2 TRADE DEVELOPMENTS, 1967 TO 1978

The machinery sector's importance within manufacturing emerges from a very high degree of trade involvement and specialization. In Canada, this is underlined by the traditionally uneven split between machinery exports and imports in the total trade of machinery and equipment.

In 1978, the Canadian trade turnover of $9.5 billion was unevenly divided between $2.6 billion of exports and close to $7.0 billion of imports. At the same time, Canadian factory shipments of roughly $4.9 billion amounted to about a half of domestic market requirements. Thus, retained Canadian production held a quarter of the Canadian market, the remaining three-quarters had been served by machinery imports.

CHART 7.1

MACHINERY INDUSTRIES: SELECTED TRADE MEASURES

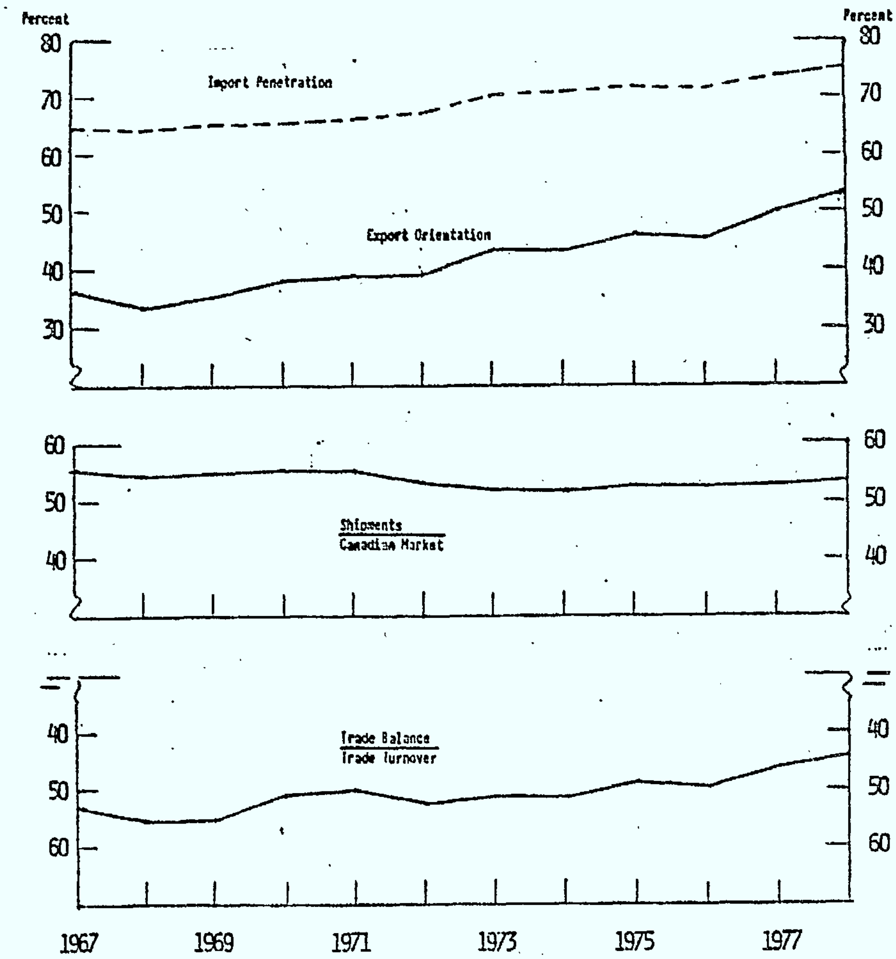

TABLE 7.2

MACHINERY INDUSTRIES: TRADE MEASURES, 1967 TO 1978

YEAR	DOMESTIC EXPORTS	ADJUSTED IMPORTS[1]	TRADE BALANCE	TRADE TURNOVER (EXPORTS + IMPORTS)	CANADIAN FACTORY SHIPMENTS	CANADIAN MARKET[2]	TRADE BALANCE / TRADE TURNOVER	SHIPMENTS / CANADIAN MARKET	EXPORT ORIENTATION	IMPORT PENETRATION
	(MILLIONS OF DOLLARS)						(PERCENT)			
1967	548	1,751	-1,203	2,298	1,517	2,720	-52.3	55.8	36.1	64.4
1968	496	1,747	-1,251	2,243	1,480	2,732	-55.8	54.2	33.5	64.0
1969	615	2,058	-1,443	2,673	1,735	3,178	-54.0	54.6	35.4	64.8
1970	679	2,088	-1,409	2,766	1,777	3,186	-50.9	55.8	38.2	65.5
1971	736	2,225	-1,489	2,961	1,866	3,355	-50.3	55.6	39.5	66.3
1972	837	2,704	-1,868	3,541	2,135	4,002	-52.7	53.3	39.2	67.6
1973	1,051	3,299	-2,248	4,349	2,432	4,680	-51.7	52.0	43.2	70.5
1974	1,362	4,276	-2,914	5,638	3,138	6,051	-51.7	51.9	43.4	70.7
1975	1,729	5,102	-3,373	6,832	3,732	7,105	-49.4	52.5	46.3	71.8
1976	1,745	5,295	-3,550	7,040	3,885	7,435	-50.4	52.3	44.9	71.2
1977	2,040	5,670	-3,630	7,710	4,082	7,712	-47.1	52.9	50.0	73.5
1978	2,618	6,915	-4,297	9,533	4,939	9,236	-45.1	53.5	53.0	74.9

[1]Total imports less re-exports; [2]Shipments plus imports less exports.

Domestic exports of the machinery industries rose 15.3 percent per annum between 1967 and 1978, from $548 million to $2.6 billion (Table 7.2). Export orientation increased from 36.1 percent in 1967 to 53.0 percent in a gradual and little interrupted trend. Rising exports contributed to a moderately improved "normalized" deficit over the period. This measure first rose in 1968 to a deficit of 55 percent but gradually declined to a value of 45 percent in 1978.

The exports of the machinery group are dominated by the miscellaneous machinery and equipment manufacturers which in 1978 contributed close to 60 percent of the group's exports. Their exports increased faster than for the overall group and their export orientation, which was 28.2 percent in 1967, climbed to 46.8 percent in 1978.

Agricultural implements experienced a relatively lower rate of growth in their exports in the period. The 10.4 percent average annual increments were lower than for imports and the changes in export orientation reflected cyclical ups and downs without any decisive trend. On the other hand, office and store machinery manufacturers experienced the strongest export increases, close to 20 percent annually. Their export orientation consequently more than doubled, rising from 42 percent in 1967 to more than 90 percent in 1978. Exports of commercial refrigeration equipment remained insignificant throughout the period.

Machinery and equipment imports realized a moderately lower growth rate of 11.7 percent per annum in comparison to 15.0 percent for all manufacturing imports, thus their share declined from 22 percent in 1967 to about 17 percent in 1978. Nevertheless, machinery imports by their magnitude dominated this performance. They rose from $1.8 billion in 1967 to $6.9 billion in 1978. At the same time, imports of machinery were roughly 20 percent larger than production shipments and accounted for two-thirds of the Canadian market in the beginning of the period and about three-quarters in 1978.

This industry group is very heavily import dependent, the import penetration of the domestic market by machinery imports being significantly above that in overall manufacturing. The only exception to this is commercial refrigeration and air conditioning. This strongly suggests that many product lines of capital goods, for both goods and services producing industries, enter Canada as technological transfers from abroad in setting up and upgrading Canadian production processes.

As was the case with exports, imports of machinery are very much influenced by miscellaneous machinery and equipment imports. Close to two thirds of the group's imports are in this category and their import penetration is, at 72 percent, quite high. In the 'sixties, and up to 1972 the import penetration rose very slowly. However, the more recent years have seen a faster rising trend.

TABLE 7.3

MACHINERY INDUSTRIES: EXPORTS AND EXPORT ORIENTATION BY INDUSTRY, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
	(MILLIONS OF DOLLARS)											
DOMESTIC EXPORTS												
TOTAL	548	496	615	679	736	837	1,051	1,362	1,729	1,745	2,040	2,618
AGRICULTURAL IMPLEMENT IND.	204	169	180	164	175	217	290	398	543	540	559	605
MISC. MACHINERY & EQUIPMENT MFRS.	277	271	356	392	405	425	551	741	906	867	1,128	1,530
COMMERCIAL REFRIG. & AIR CONDIT. MFRS.	2	1	2	2	2	3	3	3	3	3	2	2
OFFICE & STORE MACHINERY MFRS.	65	55	77	120	154	191	207	220	276	335	352	481
	(PERCENT)											
EXPORT ORIENTATION												
TOTAL	36.1	33.5	35.4	38.2	39.5	39.2	43.2	43.4	46.3	44.9	50.0	53.0
AGRICULTURAL IMPLEMENT IND.	63.0	62.4	62.3	72.5	73.0	68.4	68.6	69.7	71.3	63.3	67.7	64.8
MISC. MACHINERY & EQUIPMENT MFRS.	28.2	26.9	29.2	30.6	30.4	29.2	34.4	35.9	37.3	35.8	42.6	46.8
COMMERCIAL REFRIG. & AIR CONDIT. MFRS.	3.3	2.3	2.3	3.0	2.4	3.1	2.1	1.7	2.1	1.5	1.0	1.0
OFFICE & STORE MACHINERY MFRS.	42.1	39.3	49.7	63.1	76.1	73.0	72.2	63.7	74.2	81.4	86.7	95.9

TABLE 7.4

MACHINERY INDUSTRIES: SHIPMENTS AND IMPLICIT SELF-SUFFICIENCY[1] BY INDUSTRY, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
	(MILLIONS OF DOLLARS)											
FACTORY SHIPMENTS												
TOTAL	1,517	1,480	1,735	1,777	1,866	2,135	2,432	3,138	3,732	3,885	4,082	4,939
AGRICULTURAL IMPLEMENT IND.	323	270	290	227	240	317	423	572	762	853	826	934
MISC. MACHINERY & EQUIPMENT MFRS.	983	1,008	1,216	1,278	1,335	1,454	1,603	2,065	2,433	2,419	2,645	3,268
COMMERCIAL REFRIG. & AIR CONDIT. MFRS.	56	63	74	82	89	101	119	154	164	201	205	236
OFFICE & STORE MACHINERY MFRS.	154	139	155	191	202	262	287	346	373	412	405	501
SHIPMENTS/CANADIAN MARKET	(PERCENT)											
TOTAL	55.8	54.2	54.6	55.8	55.6	53.3	52.0	51.9	52.5	52.3	52.9	53.5
AGRICULTURAL IMPLEMENT IND.	64.7	65.2	70.4	72.8	63.6	63.5	64.0	61.4	60.8	58.6	58.3	58.9
MISC. MACHINERY & EQUIPMENT MFRS.	54.4	53.2	53.3	54.5	55.3	51.6	49.6	50.1	50.5	50.0	51.8	53.0
COMMERCIAL REFRIG. & AIR CONDIT. MFRS.	47.4	45.2	52.5	56.0	57.8	55.3	52.9	51.2	54.4	58.1	57.0	54.4
OFFICE & STORE MACHINERY MFRS.	52.5	49.2	45.0	49.9	49.6	52.1	51.2	49.6	50.7	51.7	49.3	47.7

[1] Ratio of shipments to Canadian market

TABLE 7.5

MACHINERY INDUSTRIES: IMPORTS AND IMPORT PENETRATION BY INDUSTRY, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
	(MILLIONS OF DOLLARS)											
ADJUSTED IMPORTS												
TOTAL	1,751	1,747	2,058	2,088	2,225	2,704	3,299	4,276	5,102	5,295	5,670	6,915
AGRICULTURAL IMPLEMENT IND.	380	313	302	249	312	399	529	758	1,034	1,142	1,150	1,258
MISC. MACHINERY & EQUIPMENT MFRS.	1,102	1,158	1,421	1,460	1,486	1,789	2,182	2,797	3,288	3,285	3,593	4,427
COMMERCIAL REFRIG. & AIR CONDIT. MFRS.	64	78	68	67	67	85	108	150	141	148	157	200
OFFICE & STORE MACHINERY MFRS.	204	198	266	312	360	432	480	572	639	720	769	1,030
	(PERCENT)											
IMPORT PENETRATION												
TOTAL	64.4	64.0	64.8	65.5	66.3	67.6	70.5	70.7	71.8	71.2	73.5	74.9
AGRICULTURAL IMPLEMENT IND.	76.1	75.5	73.4	80.0	82.8	79.9	79.9	81.4	82.5	78.5	81.2	79.3
MISC. MACHINERY & EQUIPMENT MFRS.	60.9	61.1	62.3	62.2	61.5	63.5	67.5	67.9	68.3	67.9	70.3	71.8
COMMERCIAL REFRIG. & AIR CONDIT. MFRS.	54.1	55.8	48.7	45.7	43.6	46.4	48.3	49.7	46.7	42.7	43.6	46.1
OFFICE & STORE MACHINERY MFRS.	69.7	70.1	77.4	81.6	88.1	85.9	85.7	82.0	86.9	90.4	93.5	98.0

The fastest import growth of 15.9 percent was noted for imports of office and store machinery. At the same time, the industry experienced a strong increase in the import penetration of the domestic market, from about 70 percent in 1967 to 98 percent in 1978. Though imports of commercial refrigeration equipment are much less important than any of the previous sub-groups, their import penetration recorded a decline of moderate proportion in the period and growth in their imports, at 10.9 percent annually, was below the average for the group.

7.3 CANADA'S SHARE OF OECD IMPORTS, 1967 TO 1977

In 1977, the OECD imported more than $56 billion U.S. of machinery and equipment, of which Canada supplied $1.5 billion or 3.0 percent (Table 7.6).

The major suppliers to the OECD were West Germany and the United States which together accounted for 45 percent in 1977. West Germany's share remained relatively stable from 1967 to 1972 after which it increased greatly for one year and has since declined. The U.S. share remained stable during the first three years of the period, it then declined hitting its lowest level of 20.0 percent in 1973. Since that time it has recovered somewhat and was 21.2 percent in 1977, demonstrating an average annual decline for the period as a whole of 1.4 percent. The greatest gain was made by Japan which increased its share throughout the eleven year period at the average annual rate of 11.6 percent. As a result of this more than tripling of its market share, Japan was the sixth largest supplier in 1977. While still only having a small market share, the other developing market economies increased their 1967 share by more than fivefold.

Canada's share varied little over most of the eleven years. From 3.5 percent in 1967 its share declined to 3.0 percent in 1971 and has since remained in the 2.8 to 3.1 percent range. In spite of this, Canada's share of all of the major markets declined, with the major decrease being the lowering of its 1967 U.S. market share of 26.3 percent to 20.5 percent in 1977. The United States is Canada's largest export market purchasing 75.4 percent of its world exports in 1977 and 86.5 percent of its OECD exports (Table 7.7). Its overall OECD market share was maintained in 1976 and 1977 because the U.S. market was growing at almost twice the rate of the OECD as a whole (Table 7.8).

Although Canada's share for this industry group as a whole varied little over the period under review, the commodity distribution within the group changed significantly. The three agricultural machinery commodities, which represented 44.0 percent of OECD imports from Canada in 1967, declined to 27.9 percent by 1977 (Table 7.10). In contrast, office machines played an increasingly important role representing 11.8 percent of imports in 1967 and 17.1 percent in 1977. These commodities have the largest share of OECD imports and their value has increased faster than total imports. Most of the Canadian increase took place in the U.S. market where imports from Canada grew at an average annual rate of 24.5 percent (Table 7.12). Other commodities performing well included: pumps and centrifuges, other agricultural equipment, machinery and mechanical appliances and roller bearings.

TABLE 7.6

MACHINERY AND EQUIPMENT: OECD IMPORTS BY SOURCE[1]
DISTRIBUTION AND ANNUAL RATE OF CHANGE

	DISTRIBUTION percent											Percent Change
	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1967-1977
Total Imports	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	
Developed Market Economies												
West Germany	25.3	26.0	25.1	25.3	25.9	26.1	27.4	26.1	24.5	23.9	23.8	- 0.6
United States	24.5	24.4	24.8	23.9	21.4	20.8	20.0	21.8	21.8	22.3	21.2	- 1.4
United Kingdom	11.2	10.4	10.6	10.1	10.5	9.7	8.9	8.4	8.8	8.2	8.4	- 2.8
France	6.4	6.0	6.1	6.5	7.2	7.5	7.3	7.0	7.2	7.0	7.2	1.2
Italy	7.1	7.2	6.9	7.2	7.1	7.0	6.6	9.0	6.6	6.5	6.8	- 0.4
Japan	2.0	2.2	2.7	3.3	3.7	4.1	4.5	4.5	4.6	5.3	6.0	11.6
Switzerland	4.3	4.6	4.6	4.3	4.4	4.3	4.6	4.3	4.3	4.4	4.3	..
Sweden	4.2	4.5	4.2	4.2	4.3	4.1	4.0	4.0	4.2	4.0	3.9	- 0.7
Netherlands	2.6	2.8	2.8	2.8	3.0	3.1	3.2	3.2	3.3	3.2	3.2	2.1
Canada	3.5	3.2	3.3	3.0	3.0	3.1	2.8	3.0	3.0	3.0	3.0	- 1.5
Total EEC (9)	56.7	56.6	55.8	56.5	58.0	58.0	58.0	55.9	55.1	53.9	54.5	- 0.4
Other Developed Market Economies	2.8	2.6	2.7	2.8	3.1	3.4	3.4	3.4	3.6	3.7	3.8	3.1
OPEC	..	..	..	..	..	..	..	..	..	0.1	0.1	7.2
Other Developing Market Economies	0.3	0.3	0.5	0.6	0.5	0.7	1.1	1.5	1.6	1.6	1.6	18.2
Centrally Planned Economies	1.6	1.6	1.4	1.4	1.7	1.5	1.6	1.5	1.8	1.9	1.7	0.6
ADDENDUM												
Total Imports in Millions of U.S. Dollars	12,967	13,906	16,433	20,366	22,563	26,203	34,293	42,668	47,285	49,954	56,010	

TABLE 7.7

MACHINERY AND EQUIPMENT: PERCENTAGE OF CANADA'S EXPORTS BY DESTINATION[2]

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	OECD Share 1977
O.E.C.D.	91.6	89.5	90.2	89.1	89.4	90.9	90.3	88.2	81.8	85.1	87.2	100.0
United States	77.9	76.8	78.1	73.7	75.3	78.6	76.5	73.2	67.8	71.6	75.4	86.5
Japan	1.9	1.8	1.2	1.2	1.6	1.1	1.1	1.4	1.7	1.4	0.9	1.0
E.E.C. (9)	7.2	7.0	6.6	9.0	7.8	7.4	8.8	8.5	7.6	7.6	6.9	7.9
United Kingdom	3.9	4.0	3.3	3.9	3.9	4.0	3.8	3.4	2.7	2.8	2.3	2.6
Rest of World	8.4	10.5	9.8	10.9	10.6	9.1	9.7	11.8	18.2	14.9	12.8	

1 For source and notes see Table 2.6.

2 For source and notes see Table 2.7.

TABLE 7.8

MACHINERY AND EQUIPMENT: GROWTH OF FOREIGN IMPORTS[1]

(percent)

	OECD	U.S.A.	JAPAN	EEC (9)*	OTHER OECD	DEVELOPING COUNTRIES**
1967	-	-	-	-	-	-
1968	7.2	10.5	36.9	10.3	4.3	12.5
1969	18.2	16.0	17.1	21.8	17.7	13.8
1970	23.9	17.2	30.5	29.6	23.1	14.4
1971	10.8	8.7	3.0	6.2	13.0	11.3
1972	16.1	27.9	- 1.2	11.3	16.9	18.4
1973	30.9	27.1	40.1	32.5	30.5	29.4
1974	24.4	23.2	26.8	22.9	24.8	46.4
1975	10.8	10.2	-12.0	13.3	11.9	45.0
1976	5.6	10.5	-7.6	9.6	4.7	8.1
1977	12.1	21.1	15.3	11.6	10.6	14.6

TABLE 7.9

MACHINERY AND EQUIPMENT: CANADA'S TRADE SHARE BY MARKET[1]

(percent)

1967	3.5	26.3	3.4	2.2	0.2	0.9
1968	3.2	23.1	2.2	1.7	0.3	1.0
1969	3.3	25.1	1.2	1.5	0.3	1.0
1970	3.0	23.5	0.7	1.8	0.3	1.0
1971	3.0	24.0	1.1	1.7	0.3	1.0
1972	3.1	24.0	0.8	1.6	0.2	0.8
1973	2.8	21.6	0.8	1.7	0.2	0.9
1974	3.0	22.6	1.0	1.9	0.3	1.0
1975	3.0	22.2	2.0	1.7	0.3	1.2
1976	3.0	22.0	1.9	1.7	0.3	1.0
1977	3.0	20.5	1.2	1.6	0.2	0.9

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1 For source and notes see Table 2.8.

TABLE 7.10

MACHINERY AND EQUIPMENT: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE OECD[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
			Total OECD Imports		Imports from Canada	
	Total OECD Imports	Imports from Canada	1967	1977	1967	1977
TOTAL, MACHINERY AND EQUIPMENT	15.8	13.8	100.0	100.0	100.0	100.0
Steam engines	15.3	18.0	1.0	0.9	0.4	0.5
Gas turbines	26.3	- 5.8	0.3	0.6	1.9	0.3
Nuclear reactors	36.4	n.a.	0.1	0.6	..	..
Engines, n.e.s.	17.6	6.8	0.5	0.6	0.2	0.1
Agricultural machinery for soil cultivation	15.4	10.0	1.1	1.1	8.8	6.3
Agricultural machinery for harvesting and threshing	13.1	8.3	4.2	3.4	35.2	21.5
Other agricultural machinery	14.8	22.6	0.8	0.7	0.9	1.9
Tractors other than road tractors	16.8	16.1	4.8	5.3	5.4	6.5
Office machines	17.8	18.1	16.2	19.3	11.8	17.1
Metal working machinery	10.3	12.5	9.8	6.0	2.5	2.2
Textile machinery	10.4	5.8	6.8	4.2	1.1	0.5
Leather machinery	11.5	- 2.6	0.3	0.2	0.3	0.1
Machines for special industries	15.8	17.0	13.9	13.9	6.2	8.2
Heating and cooling equipment	14.4	9.7	5.8	5.1	3.4	2.3
Pumps and centrifuges	18.0	24.4	7.6	9.2	3.4	8.3
Mechanical handling equipment	16.8	16.9	6.0	6.6	3.8	5.0
Powered tools, n.e.s.	17.5	16.7	3.1	3.7	3.5	4.6
Other non-electrical machines	17.2	12.8	3.6	4.1	1.7	1.5
Ball, roller or needle - roller bearings	17.4	19.6	2.5	2.9	1.8	3.0
Machinery and mechanical appliances	14.9	18.4	6.2	5.7	3.0	4.5
Moulding boxes	18.0	15.0	0.6	0.7	3.0	[illegible]
Transmission shafts, etc.	16.0	9.6	3.2	3.3	1.5	[illegible]
Non-electrical machinery parts	14.6	27.9	0.8	0.7	0.2	0.5
Electro-mechanical hand tools	19.7	34.8	0.7	1.0	0.1	0.7

TABLE 7.11

MACHINERY AND EQUIPMENT: CANADA'S SHARE OF IMPORTS BY THE OECD[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, MACHINERY AND EQUIPMENT	3.5	3.2	3.3	3.0	3.0	3.1	2.8	3.0	3.0	3.0	3.0
Steam engines	1.3	1.5	2.1	7.7	4.2	1.8	1.0	1.4	1.3	1.5	1.6
Gas turbines	26.3	9.5	2.7	2.5	4.9	3.3	2.4	1.3	4.3	1.8	1.4
Nuclear reactors	-	-	..	..	-	0.1	-	..	..	1.2	0.1
Engines, n.e.s.	1.2	0.4	1.1	4.4	2.2	0.2	0.6	1.5	1.5	0.3	0.5
Agricultural machinery for soil cultivation	27.5	18.1	19.6	22.7	19.3	21.3	19.1	18.3	19.9	19.8	17.0
Agricultural machinery for harvesting and threshing	29.3	24.8	23.5	20.9	22.7	20.7	18.1	18.0	19.5	19.3	19.0
Other agricultural machinery	4.0	4.1	3.9	3.8	7.5	6.7	7.1	8.1	8.5	10.6	7.7
Tractors other than road tractors	3.9	4.8	6.6	6.2	4.7	5.5	5.4	5.4	3.9	4.1	3.7
Office machines	2.6	2.3	2.6	2.7	3.2	4.1	2.9	2.7	2.6	3.1	2.6
Metal working machinery	0.9	0.8	1.1	0.8	1.1	0.8	0.7	0.7	0.8	0.8	1.1
Textile machinery	0.6	0.5	0.6	0.6	0.4	0.5	0.4	0.3	0.3	0.4	0.4
Leather machinery	3.5	3.1	2.2	2.1	2.6	2.8	1.7	1.8	1.7	0.8	0.9
Machines for special industries	1.6	1.6	1.7	1.5	1.8	1.4	1.2	1.7	1.8	1.6	1.7
Heating and cooling equipment	2.0	2.0	2.6	2.9	2.7	2.1	1.8	2.3	2.0	1.7	1.3
Pumps and centrifuges	1.6	2.3	2.7	2.6	3.1	2.8	2.7	2.8	2.3	2.7	2.7
Mechanical handling equipment	2.2	2.5	3.0	2.6	2.3	2.0	1.9	2.5	2.2	2.0	2.2
Powered tools, n.e.s.	4.0	4.1	3.6	3.4	2.9	3.6	3.9	4.3	4.4	3.4	3.7
Other non-electrical machines	1.6	1.6	1.6	1.3	1.4	1.4	1.3	1.1	1.2	1.2	1.1
Ball, roller or needle - roller bearings	2.6	2.5	2.8	2.8	3.0	3.8	3.5	2.9	2.8	2.8	3.1
Machinery and mechanical appliances	1.7	2.0	2.4	2.4	1.9	1.9	2.0	1.9	2.1	2.1	2.3
Moulding boxes	18.3	19.7	16.8	17.9	14.3	15.6	16.2	15.1	11.2	12.4	14.2
Transmission shafts, etc.	1.7	1.5	1.2	0.8	0.6	0.7	0.7	0.7	0.9	0.9	0.9
Non-electrical machinery parts	0.7	0.7	0.6	0.8	0.6	0.6	0.8	0.7	0.5	0.6	2.[illegible]
Electro-mechanical hand tools	0.6	2.5	2.3	3.2	3.4	3.4	2.7	2.7	3.5	1.9	2.[illegible]

1 For source and notes see Table 2.8.

TABLE 7.12

MACHINERY AND EQUIPMENT: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE U.S.A.[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
	Total U.S.A. Imports	Imports from Canada	Total U.S.A. Imports 1967	Total U.S.A. Imports 1977	Imports from Canada 1967	Imports from Canada 1977
TOTAL, MACHINERY AND EQUIPMENT	17.0	14.2	100.0	100.0	100.0	100.0
Steam engines	26.2	16.9	0.5	1.1	0.4	0.5
Gas turbines	11.9	-21.0	0.7	0.5	2.2	0.1
Nuclear reactors	-	-	-	-	-	-
Engines, n.e.s.	19.8	17.7	0.4	0.5	..	0.1
Agricultural machinery for soil cultivation	11.2	9.8	3.1	1.8	10.8	7.3
Agricultural machinery for harvesting and threshing	9.1	7.9	11.7	5.8	41.8	23.8
Other agricultural machinery	21.1	22.3	0.5	0.7	1.1	2.2
Tractors other than road tractors	21.6	16.8	3.6	5.3	5.7	7.2
Office machines	21.6	24.5	15.9	23.3	5.5	13.2
Metal working machinery	8.1	12.0	14.4	6.5	2.4	2.0
Textile machinery	10.5	21.1	10.5	5.9	0.2	0.4
Leather machinery	- 0.5	- 4.7	0.4	0.1	0.3	0.1
Machines for special industries	20.7	17.1	10.0	13.5	6.2	8.0
Heating and cooling equipment	20.2	11.0	2.5	3.2	3.0	2.3
Pumps and centrifuges	25.2	26.9	3.8	7.5	3.1	8.9
Mechanical handling equipment	21.7	17.2	2.8	4.2	4.2	5.5
Powered tools, n.e.s.	19.0	18.5	4.0	4.7	3.0	4.4
Other non-electrical machines	19.6	14.1	1.7	2.1	1.4	1.4
Ball, roller or needle - roller bearings	17.4	20.7	4.1	4.2	1.8	3.1
Machinery and mechanical appliances	14.1	18.1	7.2	5.6	2.9	4.1
Moulding boxes	16.1	15.3	1.3	1.2	3.4	3.8
Transmission shafts, etc.	29.3	26.7	0.5	1.3	0.3	0.8
Non-electrical machinery parts	28.6	30.7	0.2	0.5	0.1	0.5
Electro-mechanical hand tools	27.8	50.9	0.3	0.6	..	0.7

TABLE 7.13

MACHINERY AND EQUIPMENT: CANADA'S SHARE OF IMPORTS BY THE UNITED STATES[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, MACHINERY AND EQUIPMENT	26.3	23.1	25.1	23.5	24.0	24.0	21.6	22.6	22.2	22.0	20.5
Steam engines	21.0	12.8	15.2	41.6	24.4	12.2	5.3	8.7	6.9	7.3	9.8
Gas turbines	80.3	39.4	11.6	7.3	18.0	4.7	19.6	22.7	15.3	7.6	2.5
Nuclear reactors	-	-	-	-	-	-	-	-	-	-	-
Engines, n.e.s.	2.4	2.8	13.9	19.5	8.6	0.5	3.4	8.5	7.3	1.4	2.0
Agricultural machinery for soil cultivation	92.4	85.4	88.2	86.2	82.5	81.1	80.7	75.8	78.9	82.3	81.0
Agricultural machinery for harvesting and threshing	94.1	85.7	88.6	87.7	90.6	90.7	86.7	83.7	82.5	85.2	83.8
Other agricultural machinery	54.4	58.9	50.7	48.5	65.6	55.5	60.9	64.5	71.4	68.9	60.1
Tractors other than road tractors	42.0	49.9	52.5	40.5	34.0	36.3	35.9	27.3	23.5	31.8	27.9
Office machines	9.1	8.6	12.8	13.4	18.8	24.4	13.6	11.4	10.9	13.2	11.6
Metal working machinery	4.4	3.9	7.4	7.1	12.5	8.7	7.5	6.0	6.3	5.7	6.3
Textile machinery	0.5	0.6	1.0	1.2	0.7	1.2	1.3	1.4	1.2	1.6	1.3
Leather machinery	19.2	14.8	13.5	16.1	14.6	12.1	12.3	14.6	14.4	9.4	12.4
Machines for special industries	16.4	13.9	15.4	14.0	16.4	12.5	11.9	16.5	16.4	13.1	12.2
Heating and cooling equipment	31.6	34.9	38.2	42.6	39.4	38.2	29.9	31.0	20.7	14.5	14.3
Pumps and centrifuges	21.2	29.7	32.7	31.0	32.0	25.9	26.1	26.6	23.7	26.6	24.3
Mechanical handling equipment	38.7	33.5	33.9	33.5	34.6	29.2	25.9	30.9	28.7	25.9	26.6
Powered tools, n.e.s.	19.9	19.5	20.1	20.4	22.7	23.7	24.9	27.0	24.3	18.0	19.1
Other non-electrical machines	21.0	22.3	23.4	18.9	20.9	19.9	17.8	14.9	13.8	14.1	13.1
Ball, roller or needle - roller bearings	11.6	11.7	14.4	13.3	15.8	16.8	15.8	13.8	14.6	14.7	15.3
Machinery and mechanical appliances	10.8	13.9	17.1	18.7	15.7	14.3	13.9	13.5	13.8	15.2	15.3
Moulding boxes	70.2	73.9	66.2	68.9	65.6	65.1	67.4	69.0	63.6	64.9	65.3
Transmission shafts, etc.	16.2	12.7	15.1	13.4	10.8	12.9	12.5	15.1	13.6	10.7	13.2
Non-electrical machinery parts	18.8	9.9	9.8	11.7	6.5	7.3	8.8	7.0	5.9	8.0	22.2
Electro-mechanical hand tools	4.3	36.8	36.3	46.9	36.8	34.6	29.7	26.7	33.5	23.1	22.7

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1 For source and notes see Table 2.8.

TABLE 7.14

MACHINERY AND EQUIPMENT: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE E.E.C.[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
	Total E.E.C. Imports	Imports from Canada	Total E.E.C. Imports 1967	Total E.E.C. Imports 1977	Imports from Canada 1967	Imports from Canada 1977
TOTAL, MACHINERY AND EQUIPMENT	16.6	13.0	100.0	100.0	100.0	100.0
Steam engines	12.8	36.1	1.1	0.8	0.1	0.5
Gas turbines	4.3	51.5	0.2	1.8	0.1	2.7
Nuclear reactors	45.2	-	..	0.3	-	-
Engines, n.e.s.	21.5	16.8	0.6	1.0	0.3	0.5
Agricultural machinery for soil cultivation	22.9	26.1	0.3	0.6	0.3	0.8
Agricultural machinery for harvesting and threshing	18.1	28.5	1.4	1.6	2.5	9.1
Other agricultural machinery	13.8	26.6	0.5	0.4	0.1	0.2
Tractors other than road tractors	13.1	2.5	2.1	1.6	2.1	0.8
Office machines	19.8	16.0	22.6	29.5	31.8	41.6
Metal working machinery	11.0	8.1	10.4	6.4	3.7	2.4
Textile machinery	10.2	- 2.9	7.4	4.2	7.2	1.6
Leather machinery	11.2	4.5	0.1	0.1	0.1	..
Machines for special industries	14.2	14.6	13.1	10.6	6.0	7.0
Heating and cooling equipment	14.1	2.1	5.4	4.3	8.0	2.9
Pumps and centrifuges	17.4	13.9	8.2	8.7	4.9	5.3
Mechanical handling equipment	18.5	19.1	5.1	6.0	1.8	3.0
Powered tools, n.e.s.	16.0	9.2	3.7	3.5	7.1	5.1
Other non-electrical machines	16.2	5.6	3.6	3.5	4.6	2.3
Ball, roller or needle - roller bearings	17.8	20.8	3.2	3.6	1.4	2.7
Machinery and mechanical appliances	16.5	15.7	5.1	5.1	5.2	6.6
Moulding boxes	17.8	10.5	0.5	0.5	1.7	1.4
Transmission shafts, etc.	16.5	- 1.8	3.8	3.8	10.7	2.6
Non-electrical machinery parts	17.2	12.9	0.7	0.7	0.2	[illegible]
Electro-mechanical hand tools	25.0	28.3	0.8	1.6	0.2	[illegible]

TABLE 7.15

MACHINERY AND EQUIPMENT: CANADA'S SHARE OF IMPORTS BY THE E.E.C. (EXCLUDING INTRA TRADE)[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, MACHINERY AND EQUIPMENT	2.2	1.7	1.5	1.8	1.7	1.6	1.7	1.9	1.7	1.7	1.6
Steam engines	0.2	0.6	0.4	0.3	2.6	0.3	0.7	1.1	0.3	1.0	1.1
Gas turbines	1.4	1.5	3.2	0.8	1.6	11.0	4.2	0.6	9.5	3.6	2.4
Nuclear reactors	-	-	0.4	0.2	-	1.6	-	0.4	0.2	-	-
Engines, n.e.s.	1.1	0.5	0.3	8.6	0.7	0.3	0.5	1.9	3.4	0.6	0.7
Agricultural machinery for soil cultivation	1.6	1.6	1.5	4.8	6.0	5.0	3.7	3.7	4.6	2.3	2.1
Agricultural machinery for harvesting & threshing	3.9	3.7	3.6	2.4	2.5	2.5	2.6	3.6	4.8	5.9	9.0
Other agricultural machinery	0.3	0.6	1.5	0.4	1.0	0.9	1.5	0.3	0.9	0.6	0.8
Tractors other than road tractors	2.1	2.6	2.4	2.5	2.0	1.8	2.0	1.8	1.6	1.3	0.8
Office machines	3.0	1.9	1.9	2.6	2.2	2.1	2.9	3.2	2.7	2.5	2.2
Metal working machinery	0.8	0.6	0.7	0.6	0.8	1.3	0.5	0.6	0.5	0.7	0.6
Textile machinery	2.1	1.9	1.6	1.4	1.1	1.1	0.8	0.6	0.6	0.6	0.6
Leather machinery	2.4	0.7	0.9	1.1	0.6	2.2	3.5	8.7	10.2	0.6	1.3
Machines for special industries	1.0	0.8	1.2	0.8	1.3	1.0	0.9	1.2	1.0	1.3	1.0
Heating and cooling equipment	3.2	2.8	1.5	1.4	1.4	1.5	2.4	2.2	1.2	1.0	1.0
Pumps and centrifuges	1.3	1.5	0.9	1.1	1.6	1.2	1.2	1.2	1.0	1.2	0.9
Mechanical handling equipment	0.8	0.7	1.0	0.8	1.6	0.9	0.8	1.2	0.7	1.1	0.8
Powered tools, n.e.s.	4.2	3.7	3.0	2.9	2.3	2.6	2.2	2.9	2.8	2.4	2.3
Other non-electrical machines	2.7	2.2	2.1	1.7	1.9	1.9	1.4	1.2	1.5	1.4	1.1
Ball, roller or needle - roller bearings	0.9	0.7	-0.9	2.2	1.7	0.8	0.8	1.1	1.2	1.0	1.2
Machinery and mechanical appliances	2.2	2.0	1.7	1.6	1.7	1.5	2.0	2.1	1.7	1.8	2.0
Moulding boxes	7.7	7.5	7.7	9.3	2.5	3.9	4.4	4.3	3.4	2.5	4.0
Transmission shafts, etc.	6.0	3.0	1.4	1.3	1.0	1.1	1.1	0.8	1.0	1.3	1.1
Non-electrical machinery parts	0.6	1.0	0.8	1.2	1.4	0.9	0.8	0.9	0.7	0.5	0.4
Electro-mechanical hand tools	0.6	1.4	0.2	0.2	0.1	0.1	0.2	0.6	0.5	0.9	0.7

1 For source and notes see Table 2.8.

CHAPTER VIII

TRADE IN TRANSPORTATION EQUIPMENT

CHAPTER VIII
TRADE IN TRANSPORTATION EQUIPMENT

8.1 CHARACTERISTICS OF THE DOMESTIC INDUSTRIES

The transportation equipment group[1] consists of motor vehicle and parts manufacturers, aircraft and parts, shipbuilding, railway rolling stock and other industries engaged in boatbuilding and repair. Also included are miscellaneous off-higway, specialized vehicle manufacturers. It should be noted that in 1978 motor vehicles and parts embraced more than 80 percent of shipments contained in this major group, for an export volume of more than $12 billion.

The industries in this group show a very high degree of industrial concentration[2]. The weighted average of the leading four enterprises in 1974 accounted for 67.5 percent of value added. The highest concentrations (of shipments and employment) were indicated by motor vehicle manufacturers and by railroad rolling stock industries. Foreign owned establishments[3], about a fifth of the industry, control 85 percent of factory shipments and some 72.5 percent of total group employment. Several sub-groups in the automotive industry for example, show even higher foreign ownership.

Table 8.1, showing selected major group data outlines the general importance of this sector to the Canadian economy and its performance between 1967 and 1978. This large sector accounts for 13.7 percent of manufacturing shipments and 10.6 percent of its employment. At the same time, it now provides for approximately a third of overall manufacturing trade in both directions.

The transportation equipment sector, after food and beverages, is the second largest sector of Canadian manufacturing ranked in terms of shipments. During the period 1967 to 1978, the sector experienced the highest rate of growth in production and trade and proved to be the most dynamic among the major manufacturing groups. These developments were essentially the result of the Canada-United States Automotive Products Trade Agreement which rationalized the North-American production of motor vehicles through an increased specialization in trade.

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1 1970 SIC codes 321 to 329

2 See corresponding notes on page 23.

3 See corresponding notes on page 23.

TABLE 8.1

TRANSPORTATION EQUIPMENT INDUSTRIES

SELECTED INDICATORS

	1967	1978	Average Annual Rate of Growth 1967-1978	1978 Share of Total Manufacturing Activity
			(percent)	
REAL DOMESTIC PRODUCT (Constant $, millions)	1,617.0	3,129.7	6.2	12.4
SHIPMENTS ($ millions)	4,721	17,854	12.9	13.7
DOMESTIC EXPORTS ($ millions)	2,161	13,511	18.0	34.7
IMPORTS LESS RE-EXPORTS ($ millions)	2,542	14,281	17.0	34.6
EMPLOYMENT (000's)	149	169	1.2	10.6
PROFITS ($ millions)	471	1,045	7.5	8.0
INVESTMENT ($ millions)	253.1	651.5	9.0	6.8

Source: See Table 2.1.

8.2 TRADE DEVELOPMENTS, 1967 TO 1978

An extremely sharp growth of exports and imports of transportation products, especially of automotive goods, led to a pronounced structural shift in the trade pattern of this sector. The change was of sufficient size to be reflected in the pattern of overall manufacturing. The effects resulted from rationalization and specialization of production of motor vehicles in Canada and the United States. Analysis indicates that the increased trade had only a relatively small effect on production but was stongly visible in the measures of export orientation and import penetration of the domestic market.

Due to relatively faster growth of export between 1967 and 1970, the trade deficit of the group was gradually reduced and resulted in a small surplus in 1970. However, continued growth of imports in the 'seventies, combined with a slower growth of exports and a declining export orientation, reversed this favourable trend. Only the recovery of 1976 and 1977 in exports and export orientation of transportation equipment products brough an improvement in the "normalized" trade deficit and in implicit self-sufficiency (Table 8.2 and Chart 8.1).

TABLE 8.2

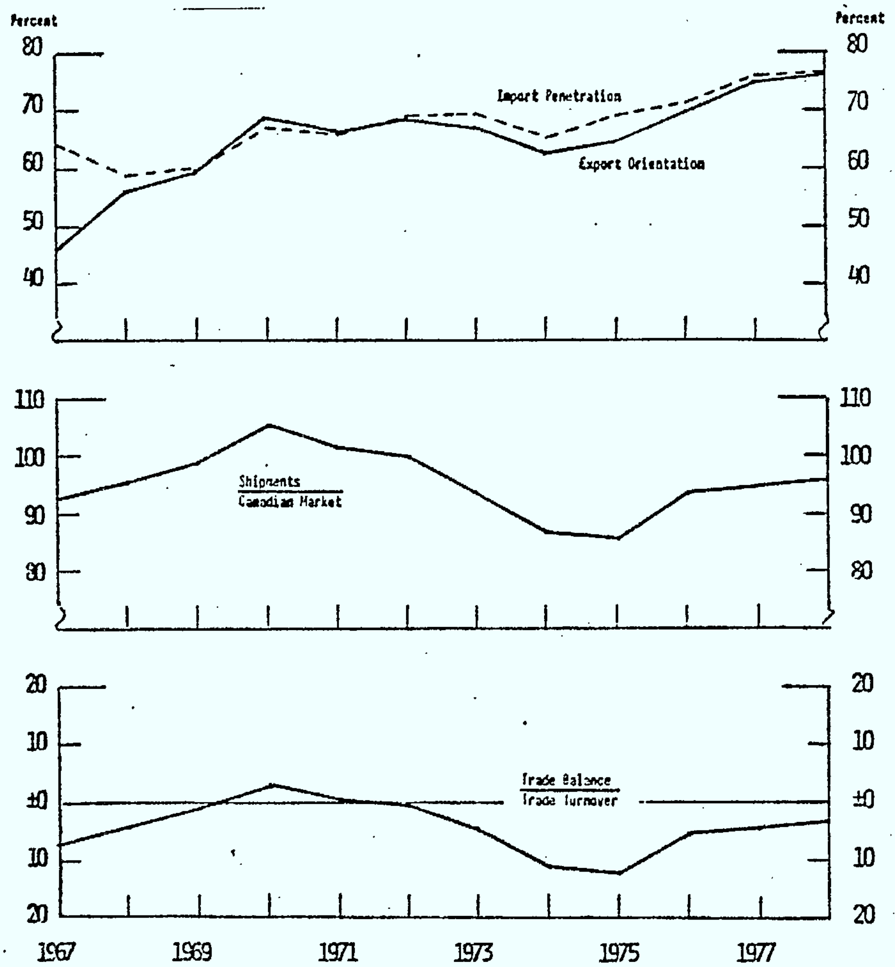
TRANSPORTATION EQUIPMENT INDUSTRIES: TRADE MEASURES, 1967 TO 1978

YEAR	DOMESTIC EXPORTS	ADJUSTED IMPORTS[1]	TRADE BALANCE	TRADE TURNOVER (EXPORTS + IMPORTS)	CANADIAN FACTORY SHIPMENTS	CANADIAN MARKET[2]	TRADE BALANCE / TRADE TURNOVER	SHIPMENTS / CANADIAN MARKET	EXPORT ORIENTATION	IMPORT PENETRATION
	(MILLIONS OF DOLLARS)						(PERCENT)			
1967	2,181	2,542	-361	4,723	4,721	5,082	-7.6	92.9	46.2	50.0
1968	3,170	3,438	-267	6,608	5,597	5,865	-4.0	95.4	56.6	58.6
1969	3,903	3,961	-58	7,865	6,485	6,543	-0.7	99.1	60.2	60.5
1970	3,951	3,689	262	7,641	5,757	5,496	3.4	104.8	68.6	67.1
1971	4,581	4,500	81	9,081	6,931	6,851	0.9	101.2	66.1	65.7
1972	5,335	5,362	-26	10,697	7,747	7,773	-0.2	99.7	68.9	69.0
1973	6,094	6,687	-593	12,782	9,057	9,650	-4.6	93.9	67.3	69.3
1974	6,352	7,925	-1,573	14,278	10,174	11,747	-11.0	86.6	62.4	67.5
1975	7,175	9,072	-1,897	16,248	11,193	13,090	-11.7	85.5	64.1	69.3
1976	9,050	9,995	-945	19,045	12,996	13,941	-5.0	93.2	69.6	71.7
1977	11,189	12,111	-922	23,300	14,986	15,908	-4.0	94.2	74.7	76.1
1978	13,511	14,281	-771	27,792	17,854	18,624	-2.8	95.9	75.7	76.7

[1] Total imports less re-exports; [2] Shipments plus imports less exports.

CHART 8.1

TRANSPORTATION EQUIPMENT INDUSTRIES: SELECTED TRADE MEASURES



Exports of transportation equipment rose more than 6 times from 1967 to $13.6 billion in 1978. Imports, in the same period, increased more than 5 times to $13.2 billion and continuous advances of both exports and imports increased the trade turnover about 5 1/2 times to $27.8 billion in 1978. However, the trade trends diverged over time. Exports outgrew imports between 1967 and 1970 to produce a trade surplus of $262 million by the latter year. The normalized trade deficit which was 6 percent in 1967 reversed into a surplus in 1970. In the 'seventies the normalized deficit returned and reached a peak of more than 11 percent in 1975 but showed a modest normalized deficit of less than 3 percent by 1978.

In 1967 less than a half of Canadian production of transportation equipment was sold in export markets. At that time about a half of the domestic market was served by Canadian factory shipments. Imports supplemented Canadian production to the extent of the remaining half. However, the rationalization of production of automotive products which began phasing in in 1966 quickly changed this situation around. By 1970 about 70 percent of Canadian production was sold abroad. Roughly, the remaining third, also representing about a third of the Canadian market, was supplemented by imports which rose to 69 percent of this market by 1970.

TABLE 8.3

TRANSPORTATION EQUIPMENT INDUSTRIES: EXPORTS AND EXPORT ORIENTATION BY INDUSTRY, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
	(MILLIONS OF DOLLARS)											
DOMESTIC EXPORTS												
TOTAL	2,181	3,170	3,903	3,951	4,581	5,335	6,094	6,352	7,175	9,050	11,189	13,511
AIRCRAFT & PARTS MFRS.	367	369	331	380	332	476	414	433	422	453	486	691
MOTOR VEHICLE MFRS.	1,166	1,854	2,354	2,202	2,590	2,832	3,198	3,640	4,163	5,142	6,639	7,738
TRUCK BODY & TRAILER MFRS.	1	2	3	4	1	2	4	4	4	3	6	15
MOTOR VEHICLE PARTS & ACCESSORIES MFRS.	558	814	1,025	1,123	1,434	1,753	2,122	1,988	2,149	2,978	3,638	4,500
RAILROAD ROLLING STOCK INDUSTRY	18	13	19	19	33	74	73	40	71	116	50	115
SHIPBUILDING & REPAIR	11	19	12	25	13	31	145	110	210	217	176	198
BOATBUILDING & REPAIR	4	7	11	11	12	17	23	23	19	20	20	25
MISC. VEHICLE MFRS.	55	91	149	186	164	151	115	113	139	120	174	229
	(PERCENT)											
EXPORT ORIENTATION												
TOTAL	46.2	56.6	60.2	68.6	66.1	68.9	67.3	62.4	64.1	69.6	74.7	75.7
AIRCRAFT & PARTS MFRS.	60.1	56.5	51.0	70.0	69.1	97.7	76.9	69.9	59.6	62.7	57.1	61.0
MOTOR VEHICLE MFRS.	47.0	61.8	66.2	74.3	70.3	70.2	67.8	67.6	69.1	72.7	79.1	77.5
TRUCK BODY & TRAILER MFRS.	0.9	0.9	1.1	1.7	0.5	0.4	0.6	0.6	0.5	0.4	0.8	1.6
MOTOR VEHICLE PARTS & ACCESSORIES MFRS.	61.2	68.2	76.4	88.3	86.4	92.1	92.1	87.2	92.4	95.7	96.7	102.8
RAILROAD ROLLING STOCK INDUSTRY	10.4	9.2	9.9	8.7	13.2	24.4	21.5	9.1	12.7	22.2	15.2	24.6
SHIPBUILDING & REPAIR	3.7	7.2	4.6	10.8	5.2	9.4	39.9	22.7	36.7	36.7	28.5	29.3
BOATBUILDING & REPAIR	14.8	19.7	24.0	23.0	23.5	25.2	28.6	21.7	16.9	18.3	15.4	17.9
MISC. VEHICLE MFRS.	67.6	75.2	70.7	79.9	75.7	85.1	84.7	87.6	115.3	102.5	140.7	153.7

1 Exports are as high as or higher than shipments:

a) due to U.S. import surcharges and a strike in 1971 exports were postponed and materialized in 1972. Sharply increased exports of wing assemblies to the U.S. and deliveries of military aircraft to Netherlands in January 1972.

b) due to above-average re-exports of imported parts.

c) due to exclusion of shipments for certain classes of trade which cannot be properly matched, e.g. armoured vehicles, ambulances, hearses, motor homes, executive vans, shipments are contained in SIC 323 and 324 rather than SIC 329 which contains the trade.

By comparison, the 'seventies saw only minor changes in the export orientation of Canadian shipments and the import penetration of the domestic market. The trade effects of the Canada-United States Automotive Products Agreement had been largely completed by 1970 and trade developments within this sector reflected intermittent changes brought about by the rising and falling value of the Canadian dollar vis-à-vis our trading partners, cost and price factors affecting our competitive position as well as supply-demand conditions in the various markets.

The sharp increases in exports of transportation equipment products noted for the overall sector between 1967 and 1970 can be traced to the motor vehicle industry as well as to the producers of motor vehicle parts. Exports as a share of Canadian factory shipments rose sharply for motor vehicles, from 47 percent in 1967 to about three-quarters of production in 1970, and from about 61 percent to more than 90 percent for motor vehicle parts. All other sectors increased their export orientation but the trend was much more moderate.

In the 'seventies, the trend lost its thrust. The component industries experienced declines and irregular peaks influenced by sector specific demand and competitive factors. The motor vehicle industry's export orientation gradually dropped and then recovered.

Other industries, aircraft and parts for example, experienced a temporary uplift in export sales in 1972 and 1973. For railway rolling stock, exports often resulted from extensive export credit arrangements with developing and industrializing countries (Mexico, Brazil) but are generally conditioned by their national developmental targets as well as economic conditions. In contrast, Canadian shipbuilding from 1973 on benefitted from substantial federal programs of assistance which were reflected in increased export sales and export orientation. Miscellaneous vehicle manufacturers enhanced their export positions with sales of snowmobiles, industrial tracked vehicles, and more recently, motorhomes.

Imports of the transportation equipment sector followed roughly a similar course as exports. Although before 1967 imports already had a significant share of the Canadian market, their growth from 1967 to 1978 was only marginally lower than in earlier years. Overall imports rose in this period about 5 1/2 times to $14.5 billion in 1978, increasing 17.0 percent annually. Assembled motor vehicles and parts contributed heavily to this trend and their rates of increase were second only to boatbuilding and miscellaneous motor vehicle products.

Between 1967 and 1970, imports increased at a substantially lower rate than exports and the normalized trade deficit was gradually reduced and turned into a normalized surplus in 1970-71. However, an acceleration in imports to 1975 led to a sharply increasing deficit which reached $1.9 billion in 1975. The trade recovery of the 1976-78 period reversed this trend and reduced the deficit to less than $0.8 billion by 1978, with a normalized trade deficit of less than 3 percent.

TABLE 8.4

TRANSPORTATION EQUIPMENT INDUSTRIES: SHIPMENTS AND IMPLICIT SELF-SUFFICIENCY[1] BY INDUSTRY, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
						(MILLIONS OF DOLLARS)						
FACTORY SHIPMENTS												
TOTAL	4,721	5,597	6,485	5,757	6,931	7,747	9,057	10,174	11,193	12,996	14,986	17,854
AIRCRAFT & PARTS MFRS.	610	654	649	544	479	487	538	620	708	723	851	1,133
MOTOR VEHICLE MFRS.	2,479	3,002	3,554	2,963	3,682	4,034	4,716	5,382	6,024	7,071	8,393	9,983
TRUCK BODY & TRAILER MFRS.	146	179	236	244	331	445	577	727	774	749	778	932
MOTOR VEHICLE PARTS & ACCESSORIES MFRS.	912	1,194	1,340	1,272	1,661	1,903	2,305	2,281	2,326	3,112	3,761	4,376
RAILROAD ROLLING STOCK INDUSTRY	176	145	189	223	252	304	341	443	559	523	331	468
SHIPBUILDING & REPAIR	286	264	260	233	260	332	364	483	572	591	617	674
BOATBUILDING & REPAIR	30	37	45	47	51	66	80	108	110	109	132	138
MISC. VEHICLE MFRS.	81	122	211	233	217	177	136	129	121	117	124	149
SHIPMENTS/CANADIAN MARKET						(PERCENT)						
TOTAL	92.9	95.4	99.1	104.8	101.2	99.7	93.9	86.6	85.5	93.2	94.2	95.9
AIRCRAFT & PARTS MFRS.	113.5	101.6	100.2	109.3	119.9	184.9	91.0	78.2	78.2	119.0	122.3	102.4
MOTOR VEHICLE MFRS.	112.9	126.0	144.5	157.1	136.2	129.0	121.7	116.7	114.7	126.6	136.8	137.0
TRUCK BODY & TRAILER MFRS.	87.5	87.5	88.7	91.9	90.9	90.5	88.9	90.7	91.1	89.0	90.5	94.4
MOTOR VEHICLE PARTS & ACCESSORIES MFRS.	56.5	56.5	52.2	56.7	62.0	62.3	61.9	52.7	48.6	54.8	53.4	55.3
RAILROAD ROLLING STOCK INDUSTRY	92.6	95.1	94.3	94.6	95.9	103.7	107.3	91.4	94.0	106.7	87.6	94.1
SHIPBUILDING & REPAIR	97.7	97.0	97.8	105.0	98.8	99.5	142.1	112.2	136.9	141.0	122.9	129.5
BOATBUILDING & REPAIR	99.0	104.1	109.1	110.4	104.1	103.1	99.0	83.9	81.8	84.4	89.7	95.6
MISC. VEHICLE MFRS.	146.5	204.7	224.4	223.3	163.3	121.2	86.3	75.6	78.9	62.7	87.1	86.4

1 Ratio of shipments to Canadian market.

Within the transportation equipment sector the import dependence varies but is generally high. In 1967 roughly a half of the Canadian market for these products was served from abroad and the percentage share rose to more than three-quarters by 1978. The specialization of production in this sector is well known and is well reflected in the import data. As illustrated by Table 8.5, the imports of automotive industries dominate the group. Their share, more than 80 percent in 1967, increased to over 90 percent by 1978, mainly due to a relative decline in imports of aircraft and parts which diminished from about 12 percent to some 5 percent in the same period.

It could also be pointed out that the highest import penetration suggested in the table is for motor vehicle parts and miscellaneous vehicles manufacturers. An interesting observation is that the share of imports of assembled vehicles (cars and trucks) remained relatively constant at around 35 percent of the group's imports but the share of motor vehicle parts rose from a share of 49 percent in 1967 to 56 percent in 1978. At the same time, import penetration for both groups of industries increased at about the same rate but reached much higher values for imported parts.

As to the other industries in this group, imports of aircraft and ships experienced the lowest growth of imports in the period, about 8 percent per annum, and miscellaneous vehicles the fastest with a rate of 21.5 percent annually. The imports of railway rolling stock kept a pace slightly below the average for the group as a whole.

TABLE 8.5

TRANSPORTATION EQUIPMENT INDUSTRIES: IMPORTS AND IMPORT PENETRATION BY INDUSTRY, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
	(MILLIONS OF DOLLARS)											
ADJUSTED IMPORTS												
TOTAL	2,542	3,438	3,961	3,689	4,500	5,362	6,687	7,925	9,072	9,995	12,111	14,281
AIRCRAFT & PARTS MFRS.	294	359	330	334	253	252	467	606	619	338	331	664
MOTOR VEHICLE MFRS.	882	1,235	1,260	1,125	1,612	1,924	2,356	2,872	3,392	3,655	4,383	5,042
TRUCK BODY & TRAILER MFRS.	22	27	33	26	35	49	76	78	79	96	88	70
MOTOR VEHICLE PARTS & ACCESSORIES MFRS.	1,260	1,733	2,252	2,094	2,450	2,906	3,540	4,032	4,606	5,548	6,923	8,033
RAILROAD ROLLING STOCK INDUSTRY	32	21	30	32	44	63	50	82	107	83	97	145
SHIPBUILDING & REPAIR	17	27	18	14	17	33	37	57	56	45	60	44
BOATBUILDING & REPAIR	5	6	7	6	10	15	24	44	43	40	35	31
MISC. VEHICLE MFRS.	29	29	32	57	80	120	137	155	171	189	193	252
	(PERCENT)											
IMPORT PENETRATION												
TOTAL	50.0	58.6	60.5	67.1	65.7	69.0	69.3	67.5	69.3	71.7	76.1	76.7
AIRCRAFT & PARTS MFRS.	54.7	55.8	50.9	67.2	63.2	95.7	79.0	76.4	68.4	55.6	47.5	60.1
MOTOR VEHICLE MFRS.	40.2	51.8	51.2	59.7	59.6	61.6	60.8	62.2	64.6	65.5	71.4	69.2
TRUCK BODY & TRAILER MFRS.	13.3	13.3	12.3	9.7	9.5	9.9	11.6	9.8	9.3	11.4	10.2	7.1
MOTOR VEHICLE PARTS & ACCESSORIES MFRS.	78.1	82.0	87.7	93.4	91.5	95.1	95.1	93.2	96.3	97.6	98.2	101.6
RAILROAD ROLLING STOCK INDUSTRY	17.0	13.7	15.0	13.6	16.8	21.5	15.8	16.9	18.0	17.0	25.7	29.1
SHIPBUILDING & REPAIR	5.9	10.0	6.6	6.3	6.3	9.8	14.6	13.2	13.3	10.8	12.0	8.4
BOATBUILDING & REPAIR	15.7	16.4	17.1	15.0	20.4	22.9	29.4	34.4	32.0	31.0	24.1	21.5
MISC. VEHICLE MFRS.	52.5	49.2	34.4	55.1	60.2	82.0	86.8	90.7	112.1	101.6	135.5	146.4

1 Imports exceed the Canadian market, calculation of which is affected by exports. See footnote under Table 8.3 for specific reasons.

8.3 CANADA'S SHARE OF OECD IMPORTS, 1967 TO 1977

The OECD importation of the broad range of commodities produced by the transportation equipment industries stands out as the largest of the 20 major categories of imports. In 1977, the OECD imported more than $73 billion U.S. of these commodities with Canada supplying $8.7 billion U.S. or 11.3 percent (Table 8.6).

West Germany and the United States are the leading OECD suppliers. West Germany's share changed little during the eleven year period with a decline of only 0.2 percent per year. The U.S. share declined at the rate of 4.0 percent per year resulting in its dropping to the position of second ranking supplier in 1977. Japan more than tripled its share growing at 12.6 percent per year and improving its ranking from sixth to third.

Aside from the U.S., the other major loser in terms of market share was the United Kingdom which began the period with a share of 12.5 percent and had 6.2 percent in 1977. This represents an average annual loss of 5.8 percent.

Canada's share increased from 12.5 percent in 1967 to 16.3 percent in 1968, thereafter it declined reaching 11.3 in 1977. These changes in market share are largely a reflection of Canada's automotive trade with the United States. The U.S. market represented 90 percent of Canada's 1977 exports of transportation equipment and 97.4 percent of its OECD exports (Table 8.7). More than 95 percent of this trade consists of road vehicles and parts (Table 8.12).

Following the rationalization of the North American auto industry, by the Canada/United States Automotive Products Agreement of 1965, Canada has been by far the largest foreign supplier in the U.S. market. Canada's share of the total U.S. transportation equipment market has been in decline since 1969, as a result its total OECD share has also declined (Table 8.9).

Major commodities in which Canada maintained its OECD import share include bodies, chassis, frames, etc., and trucks. The two major commodities facing declining shares were passenger cars and aircraft. The decline in passenger cars was due to its decline in the U.S. market. Aircraft commodities represented 9.8 percent of transportation equipment commodities in 1967, by 1977 its share was only 1.9 percent. This decline took place in the U.S. market where Canada had 66.8 percent of the import market in 1967 and only 24.5 percent in 1977.

TABLE 8.6

TRANSPORTATION EQUIPMENT: OECD IMPORTS BY SOURCE[1] DISTRIBUTION AND AVERAGE ANNUAL RATE OF CHANGE

	DISTRIBUTION percent											Percent Change
	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1967-1977
Total Imports	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	
Developed Market Economies												
West Germany	19.5	18.6	19.0	19.8	19.0	19.0	20.3	18.5	18.3	18.9	19.1	- 0.2
United States	27.0	29.0	27.3	23.3	22.2	20.9	21.6	23.1	21.7	19.0	17.9	- 4.0
Japan	4.2	4.4	4.6	6.6	8.8	10.2	9.7	12.1	10.5	12.4	13.7	12.6
Canada	12.5	15.2	16.3	14.9	15.4	14.3	12.6	12.0	11.0	11.9	11.3	- 1.0
France	6.8	6.3	6.7	7.8	7.5	8.4	8.5	7.7	9.4	9.4	9.6	3.5
United Kingdom	11.3	9.6	9.1	8.4	7.5	7.3	6.7	6.4	6.8	6.2	6.2	- 5.8
Belgium-Luxembourg	4.1	3.9	4.4	4.7	4.9	5.0	5.1	4.5	5.1	5.3	5.2	2.4
Italy	4.4	4.7	4.4	4.6	4.4	4.6	4.1	4.1	4.7	4.4	4.3	- 0.2
Sweden	3.8	3.0	2.6	3.5	3.3	3.1	3.4	3.5	3.7	3.7	3.0	- 2.3
Total EEC (9)	48.5	45.1	45.7	47.4	45.4	46.6	47.1	43.4	46.8	47.0	46.7	- 0.4
Other Developed Market Economies	2.7	2.1	2.2	2.9	2.9	3.1	3.5	3.8	3.8	3.5	4.6	5.5
OPEC	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.2	0.1	0.1	..
Other Developing Market Economies	0.4	0.4	0.5	0.5	0.9	0.7	1.0	1.1	1.1	1.2	1.4	13.3
Centrally Planned Economies	0.8	0.8	0.7	0.8	0.9	0.9	1.1	0.9	1.1	1.3	1.3	5.0
ADDENDUM												
Total Imports in Millions of U.S. Dollars	14,227	18,219	21,757	24,813	30,565	37,226	47,635	52,816	59,521	73,034	86,371	

TABLE 8.7

TRANSPORTATION EQUIPMENT: PERCENTAGE OF CANADA'S EXPORTS BY DESTINATION[2]

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	OECD Share 1977
O.E.C.D.	92.7	93.4	94.2	93.7	94.8	94.7	95.8	94.5	91.3	92.0	92.4	100.0
United States	88.3	89.7	91.2	89.3	92.1	91.4	91.6	91.3	87.4	88.8	90.0	97.4
Japan	0.1	..	..	..	..	..	0.1	0.1	0.1	..	0.1	0.1
E.E.C. (9)	1.4	1.5	1.3	2.5	1.4	2.3	2.1	1.5	2.3	1.8	1.3	1.4
United Kingdom	0.4	0.6	0.4	0.6	0.7	0.6	0.7	0.5	1.1	0.4	0.6	0.6
Rest of World	7.3	6.6	5.8	6.3	5.2	5.3	4.2	5.5	8.7	8.0	7.6	

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1 For source and notes see Table 2.6.

2 For source and notes see Table 2.7.

TABLE 8.8

TRANSPORTATION EQUIPMENT: GROWTH OF FOREIGN IMPORTS[1]

(percent)

	OECD	U.S.A.	JAPAN	EEC (9)*	OTHER OECD	DEVELOPING COUNTRIES**
1967	-	-	-	-	-	-
1968	28.1	53.5	6.8	35.1	19.2	18.5
1969	19.4	22.1	28.1	11.8	19.3	13.9
1970	14.0	13.0	68.1	8.8	14.1	6.4
1971	23.2	33.1	23.1	32.7	17.6	16.1
1972	21.8	22.8	14.1	10.2	23.4	22.7
1973	28.0	16.0	-5.3	52.9	31.3	37.1
1974	10.9	14.5	60.9	11.7	8.1	46.1
1975	12.7	-3.7	-9.7	16.6	20.2	41.5
1976	22.7	24.7	5.0	19.0	23.0	13.3
1977	18.3	20.2	-5.6	32.0	15.9	8.9

TABLE 8.9

TRANSPORTATION EQUIPMENT: CANADA'S TRADE SHARE BY MARKET[1]

(percent)

1967	12.5	54.7	0.4	1.7	0.4	2.6
1968	15.2	55.9	0.3	1.3	0.4	2.9
1969	16.3	59.1	0.3	1.3	0.2	2.9
1970	14.9	53.8	0.3	4.5	0.2	3.1
1971	15.4	50.9	0.4	3.7	0.5	2.6
1972	14.3	48.2	1.4	1.9	0.1	2.7
1973	12.6	46.5	0.4	1.5	0.2	1.2
1974	12.0	42.6	0.8	2.2	0.1	1.4
1975	11.0	45.9	0.9	1.3	0.1	1.7
1976	11.9	48.7	0.4	2.2	0.1	2.0
1977	11.3	46.2	0.5	0.7	0.1	2.1

1 For source and notes see Table 2.8.

TABLE 8.10

TRANSPORTATION EQUIPMENT: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE OECD[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
			Total OECD Imports		Imports from Canada	
	Total OECD Imports	Imports from Canada	1967	1977	1967	1977
TOTAL, TRANSPORTATION EQUIPMENT	19.8	18.5	100.0	100.0	100.0	100.0
Aircraft engines	12.8	19.5	4.1	2.3	1.1	1.2
Internal combustion engines	18.4	16.9	9.7	8.7	12.1	10.5
Automotive electrical equipment	18.8	10.5	1.8	1.7	0.5	0.2
Railway vehicles	15.1	1.0	1.1	0.8	0.7	0.1
Passenger cars	20.7	17.5	34.5	37.4	48.5	44.4
Buses	17.3	83.3	0.5	0.4	..	0.3
Trucks	21.8	21.9	5.9	7.0	9.3	12.4
Special purpose trucks	18.4	20.2	0.6	0.5	0.2	0.2
Road tractors	34.0	n.a.	0.2	0.7	..	..
Chassis for passenger cars	17.0	n.a.	..	..	0.1	-
Other chassis	14.5	n.a.	0.3	0.2	..	-
Bodies, chassis, frames, etc.	22.1	24.5	17.9	21.8	17.2	28.1
Motorcycles	22.2	33.4	1.5	1.9	..	..
Bicycles and parts	22.3	81.0	0.6	0.8	..	..
Trailers and parts	22.5	12.5	1.1	1.4	0.2	0.1
Aircraft	11.3	0.4	11.5	5.5	9.8	1.9
Ships and boats	20.6	17.8	8.3	8.9	0.3	0.3

TABLE 8.11

TRANSPORTATION EQUIPMENT: CANADA'S SHARE OF IMPORTS BY THE OECD[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, TRANSPORTATION EQUIPMENT	12.5	15.2	16.3	14.9	15.4	14.3	12.6	12.0	11.0	11.9	11.3
Aircraft engines	3.5	3.9	3.7	4.3	4.5	4.1	3.9	3.4	4.8	6.0	6.2
Internal combustion engines	15.5	18.5	17.0	17.5	20.1	18.8	15.8	13.2	12.3	14.3	13.7
Automotive electrical equipment	3.2	6.2	5.6	4.9	5.7	4.3	3.8	2.4	1.3	1.7	1.6
Railway vehicles	7.3	1.8	2.1	3.2	8.0	6.4	9.6	3.5	1.9	1.7	2.0
Passenger cars	17.5	21.1	24.1	21.4	20.7	18.8	16.2	17.1	15.6	15.2	13.4
Buses	0.1	1.5	2.1	3.9	4.4	5.5	4.6	3.8	2.7	13.2	9.1
Trucks	19.8	26.0	25.8	21.9	23.3	18.9	14.3	16.4	15.9	16.4	20.1
Special purpose trucks	4.4	7.0	8.0	5.9	4.6	8.1	7.7	6.1	7.9	5.2	5.1
Road tractors	0.1	-	..	-	..	0.2	..	0.1	0.1	-	-
Chassis for passenger cars	27.2	60.0	-	-	..	0.8	0.3	-	-	-	-
Other chassis	..	-	..	0.2	0.2	-	-	0.6	0.2	..	-
Bodies, chassis, frames, etc.	12.0	15.2	15.1	14.2	14.5	15.9	16.6	14.0	12.5	14.5	14.5
Motorcycles	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.3	0.8	0.2	0.2
Bicycles and parts	..	0.2	0.1	0.1	0.2	0.7	0.5	0.7	0.4	0.2	0.4
Trailers and parts	2.8	3.2	2.6	2.4	1.9	1.7	1.7	2.0	1.5	1.0	1.2
Aircraft	10.6	8.6	6.3	9.8	9.6	9.0	6.9	6.1	4.2	3.7	3.8
Ships and boats	0.5	0.6	1.3	0.7	3.2	1.1	1.0	1.9	0.7	1.7	0.4

1 For source and notes see Table 2.8.

TABLE 8.12

TRANSPORTATION EQUIPMENT: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE U.S.A.[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
	Total U.S.A. Imports	Imports from Canada	Total U.S.A. Imports 1967	Total U.S.A. Imports 1977	Imports from Canada 1967	Imports from Canada 1977
TOTAL, TRANSPORTATION EQUIPMENT	20.8	18.8	100.0	100.0	100.0	100.0
Aircraft engines	15.8	25.6	1.0	0.6	0.5	0.9
Internal combustion engines	19.6	17.4	10.4	9.3	12.0	10.6
Automotive electrical equipment	23.2	8.0	0.7	0.9	0.4	0.2
Railway vehicles	24.3	10.8	0.3	0.4	0.3	0.1
Passenger cars	20.4	17.6	55.8	53.7	49.9	44.9
Buses	12.8	144.6	0.3	0.2	..	0.3
Trucks	21.7	22.0	5.3	5.7	9.6	12.4
Special purpose trucks	21.1	19.2	0.1	0.1	0.2	0.2
Road tractors	-	-	-	-	-	-
Chassis for passenger cars	-	-	-	-	-	-
Other chassis	-	-	-	-	-	-
Bodies, chassis, frames, etc.	27.0	24.9	12.8	21.1	17.1	28.3
Motorcycles	20.1	50.5	3.6	3.4	..	..
Bicycles and parts	18.5	80.9	1.1	0.9	..	..
Trailers and parts	19.0	13.9	0.1	0.1	0.2	0.1
Aircraft	9.3	- 1.2	7.9	2.9	9.7	1.[illegible]
Ships and boats	19.8	20.4	0.6	0.6	0.3	0.[illegible]

TABLE 8.13

TRANSPORTATION EQUIPMENT: CANADA'S SHARE OF IMPORTS BY THE UNITED STATES[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, TRANSPORTATION EQUIPMENT	54.7	55.9	59.1	53.8	50.9	48.2	46.5	42.6	45.9	48.7	46.2
Aircraft engines	29.6	40.9	41.2	43.6	58.7	20.7	16.5	14.2	25.8	47.8	66.4
Internal combustion engines	63.2	66.0	60.7	56.9	62.4	59.1	55.0	50.2	51.0	54.7	52.4
Automotive electrical equipment	30.3	44.8	43.9	33.7	35.6	24.9	23.5	12.0	7.3	7.8	8.1
Railway vehicles	49.8	31.6	29.3	26.7	45.4	66.4	44.6	23.9	7.1	16.4	15.8
Passenger cars	48.9	49.1	55.4	49.9	46.8	46.1	42.9	41.0	44.0	43.3	38.6
Buses	..	7.4	10.8	20.8	15.6	29.7	24.8	24.5	37.2	87.5	93.8
Trucks	98.1	98.9	99.2	99.1	93.4	78.8	86.4	93.1	99.1	99.9	99.9
Special purpose trucks	95.6	96.2	70.7	71.1	79.1	84.9	94.2	94.2	84.2	76.7	82.0
Road tractors	-	-	-	-	-	-	-	-	-	-	-
Chassis for passenger cars	-	-	-	-	-	-	-	-	-	-	-
Other chassis	-	-	-	-	-	-	-	-	-	-	-
Bodies, chassis, frames, etc.	72.9	76.8	79.9	76.0	74.3	71.1	69.1	57.7	60.8	62.0	61.8
Motorcycles	0.1	..	0.1	0.1	0.1	0.1	0.2	0.5	1.5	0.3	0.5
Bicycles and parts	..	0.6	0.1	0.2	0.4	1.3	0.8	1.4	1.4	0.5	1.6
Trailers and parts	88.8	86.1	78.4	70.0	69.0	69.5	64.8	71.6	76.9	54.9	57.3
Aircraft	66.8	62.9	52.3	66.3	58.7	55.4	43.4	45.2	31.8	30.1	24.5
Ships and boats	22.9	25.8	30.8	21.6	23.1	24.2	23.3	26.3	27.8	27.7	23.9

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1 For source and notes see Table 2.8.

TABLE 8.14

TRANSPORTATION EQUIPMENT: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE E.E.C.[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
			Total E.E.C. Imports		Imports from Canada	
	Total E.E.C. Imports	Imports from Canada	1967	1977	1967	1977
TOTAL, TRANSPORTATION EQUIPMENT	22.4	12.3	100.0	100.0	100.0	100.0
Aircraft engines	15.3	11.9	13.4	7.4	38.7	37.1
Internal combustion engines	22.4	..	8.4	8.4	15.5	4.9
Automotive electrical equipment	22.5	22.3	1.5	1.5	3.3	7.7
Railway vehicles	23.4	28.5	0.9	1.0	..	0.2
Passenger cars	37.9	8.2	7.6	25.2	2.8	2.0
Buses	31.2	n.a.	0.1	0.2	-	..
Trucks	26.4	42.1	2.3	3.1	0.3	3.3
Special purpose trucks	19.4	26.8	0.6	0.4	0.4	1.4
Road tractors	41.0	n.a.	0.3	1.4	0.1	-
Chassis for passenger cars	14.0	-	..	..	-	-
Other chassis	23.5	-	0.2	0.2	-	-
Bodies, chassis, frames, etc.	22.9	11.2	9.3	9.7	13.0	11.8
Motorcycles	36.6	50.5	1.5	4.5	..	0.4
Bicycles and parts	27.6	n.a.	0.5	0.7	-	..
Trailers and parts	25.4	14.2	0.8	1.0	0.6	0.7
Aircraft	11.0	15.0	40.7	15.4	23.6	29.9
Ships and boats	28.6	3.1	12.0	19.3	1.7	0.7

TABLE 8.15

TRANSPORTATION EQUIPMENT: CANADA'S SHARE OF IMPORTS BY THE E.E.C. (EXCLUDING INTRA-TRADE)[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, TRANSPORTATION EQUIPMENT	1.7	1.3	1.3	4.5	3.7	1.9	1.5	2.2	1.3	2.2	0.7
Aircraft engines	4.9	2.6	3.5	4.2	4.4	3.6	3.7	3.5	5.1	5.7	3.6
Internal combustion engines	3.1	2.9	2.3	2.2	2.6	2.2	2.1	1.7	0.9	0.6	0.4
Automotive electrical equipment	3.8	4.9	4.9	5.7	6.7	4.5	3.2	4.2	3.8	5.7	3.7
Railway vehicles	0.1	0.1	0.3	..	0.2	0.2	0.1	0.1	0.1	0.1	0.1
Passenger cars	0.6	1.1	0.5	0.2	0.2	..	0.1	..	..	0.1	0.1
Buses	-	-	-	-	24.4	-	-	0.3	0.2	0.5	0.1
Trucks	0.2	..	0.5	2.6	1.2	0.2	0.3	3.5	0.4	1.2	0.8
Special purpose trucks	1.3	1.7	6.6	8.3	10.2	7.8	5.0	2.4	1.8	2.0	2.4
Road tractors	0.7	-	0.1	-	-	-	-	..	..	-	-
Chassis for passenger cars	-	-	-	-	2.4	9.7	6.9	-	-	-	-
Other chassis	-	-	0.3	2.4	3.8	-	-	2.0	0.7	..	-
Bodies, chassis, frames, etc.	2.4	1.6	1.3	1.6	1.6	2.1	1.7	1.3	0.9	0.5	0.9
Motorcycles	..	0.2	..	0.1	..	..	..	..	..	0.1	0.1
Bicycles and parts	-	0.1	0.1	..	-	..	..	0.2	..	0.2	..
Trailers and parts	1.3	1.2	0.6	0.5	0.7	0.6	0.3	0.4	0.2	0.2	0.5
Aircraft	1.0	0.9	0.9	8.3	6.5	3.3	1.6	1.4	1.2	1.5	1.4
Ships and boats	0.2	..	0.4	..	0.3	0.2	1.4	5.4	1.4	6.8	..

1 For source and notes see Table 2.8.

CHAPTER IX

TRADE IN ELECTRICAL PRODUCTS

CHAPTER IX
TRADE IN ELECTRICAL PRODUCTS

9.1 CHARACTERISTICS OF THE DOMESTIC INDUSTRIES

The electrical products industry group encompasses the manufacturers of major appliances, small electrical appliances, lighting fixtures, household radio and television receivers, communications equipment, electrical industrial equipment, electric wire and cable, and miscellaneous electrical products[1]. The group's products are extensively traded internationally. A fast advancing technology and specialization of production characterizes this industry group both domestically and internationally.

The industry group has a very high degree of concentration. In 1974, the weighted average of the leading four enterprises in the electrical products industries accounted for close to 59 percent of value added[2]. The highest concentrations (of shipments and employment) were found for manufacturers of electric wire and cable and for battery manufacturers. Much of the industry group is foreign owned with 34 percent of the establishments owned in the United States and 6 percent in other foreign countries. Altogether, foreign owned or controlled companies account for 61 percent of the groups' sales and 65 percent of the groups' employment[3].

The following table of selected indicators provides a snap-shot of the group's economic activity at the beginning and end of the period under consideration. The general importance of the group to the Canadian economy is indicated by the fact that in 1978 the group accounted for 6.5 percent of all manufacturing output and 7.0 percent of all manufacturing employment. The fact that the group contributed only 4.2 percent of total manufacturing shipments versus 6.5 percent of output implies lower price increases than for the rest of manufacturing. In fact, since 1971, the industry selling prices of electrical products averaged increases of only 6.6 percent compared to 7.0 percent for manufacturing as a whole. This is at least in part the result of intense competition from foreign producers, and is reflected in the below-average profit growth.

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1 1970 SIC codes 330 to 339

2 See corresponding notes on page 23.

3 See corresponding notes on page 23.

TABLE 9.1

ELECTRICAL PRODUCTS INDUSTRIES

SELECTED INDICATORS

	1967	1978	Average Annual Rate of Growth 1967-1978	1978 Share of Total Manufacturing Activity
			(percent)	
REAL DOMESTIC PRODUCT (Constant $, millions)	1,193.5	1,642.2	2.9	6.5
SHIPMENTS ($ millions)	2,313	5,443	8.2	4.2
DOMESTIC EXPORTS ($ millions)	239	975	13.6	2.5
IMPORTS LESS RE-EXPORTS ($ millions)	594	2,883	15.5	7.0
EMPLOYMENT (000's)	123	112	-0.8	7.0
PROFITS ($ millions)	170	425	8.7	3.2
INVESTMENT ($ millions)	134.2	198.3	3.6	2.1

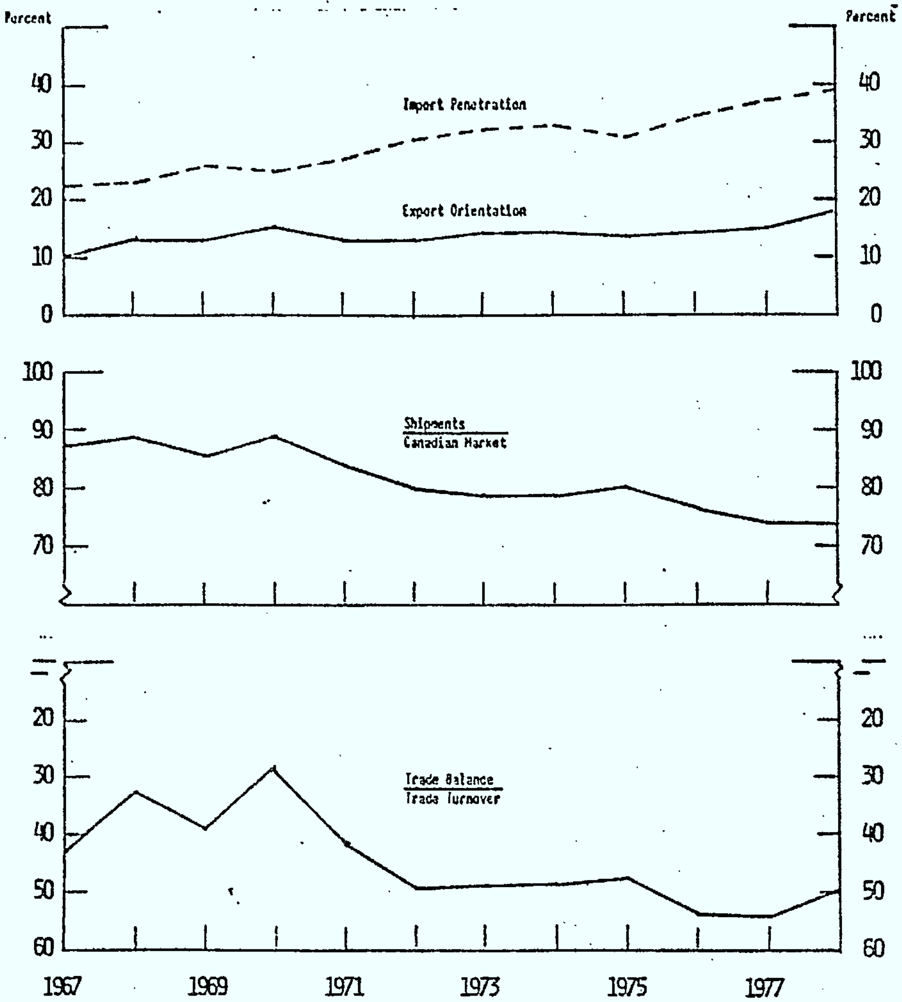
Source: See Table 2.1.

9.2 TRADE DEVELOPMENTS, 1967 TO 1978

Domestic exports of the electrical products industries as a group increased 13.5 percent per annum between 1967 and 1978, from $239 million to $975 million (see Table 9.1). Export orientation rose from 10.3 percent in 1967 to 17.9 percent in 1978. As with many industry groups, exports and export orientation rose to a peak in 1970, fell off in 1971 and then climbed somewhat sporadically to an all-time peak by 1978.

CHART 9.1

ELECTRICAL PRODUCTS INDUSTRIES: SELECTED TRADE MEASURES



The performance among industries within the group was, however, quite disparate. Communications equipment manufacturers dominated the group, accounting for slightly less than half the total exports throughout the period. In addition, the export orientation of the communications equipment producers rose from 17.1 percent in 1967 to 30.5 percent in 1978 (see Table 9.3). The most dynamic exporters among the individual industries (excluding miscellaneous) were the major appliance manufacturers with an average annual increase of 19.5 percent over the period under study, and an export orientation that jumped from 4.8 to 17.3 percent. In contrast, exports of small electric appliance manufacturers peaked in 1974 and then fell off from then right up to 1978. Export values only rose 6.5 percent per year over the entire period, and export orientation was actually lower in 1978 than it had been in 1967. Exports of radio and TV manufacturers were quite stagnant right up to 1976 and then took off in 1977 and 1978. Exports jumped 206 percent over the last two years with export orientation rising from 12.2 percent in 1975 to 31.9 percent in 1978.

TABLE 9.2

ELECTRICAL PRODUCTS INDUSTRIES: TRADE MEASURES, 1967 TO 1978

YEAR	DOMESTIC EXPORTS	ADJUSTED IMPORTS[1]	TRADE BALANCE	TRADE TURNOVER (EXPORTS + IMPORTS)	CANADIAN FACTORY SHIPMENTS	CANADIAN MARKET[2]	TRADE BALANCE / TRADE TURNOVER	SHIPMENTS / CANADIAN MARKET	EXPORT ORIENTATION	IMPORT PENETRATION
	(MILLIONS OF DOLLARS)						(PERCENT)			
1967	239	594	-355	833	2,313	2,667	-42.6	86.7	10.3	22.3
1968	320	623	-303	943	2,407	2,711	-32.2	88.8	13.3	23.0
1969	346	789	-443	1,135	2,607	3,051	-39.0	85.5	13.3	25.9
1970	423	764	-341	1,186	2,672	3,012	-28.7	88.7	15.8	25.3
1971	372	908	-537	1,280	2,795	3,331	-41.9	83.9	13.3	27.3
1972	399	1,171	-772	1,570	3,063	3,834	-49.1	79.9	13.0	30.5
1973	498	1,442	-944	1,940	3,538	4,482	-48.6	78.9	14.1	32.2
1974	622	1,795	-1,173	2,417	4,345	5,518	-48.5	78.7	14.3	32.5
1975	619	1,741	-1,122	2,360	4,599	5,721	-47.5	80.4	13.5	30.4
1976	675	2,133	-1,459	2,808	4,733	6,192	-51.9	76.4	14.3	34.5
1977	716	2,409	-1,693	3,125	4,830	6,523	-54.2	74.0	14.8	36.9
1978	975	2,883	-1,908	3,859	5,443	7,351	-49.5	74.0	17.9	39.2

[1] Total imports less re-exports; [2] Shipments plus imports less exports.

Trade in electrical products falls heavily into the area of standards, production sharing agreements, turn-key contracts and government procurement for defence contracts. Consumer goods (appliances, radio, TV's) operate in a competitive environment but standards, patents and innovative technologies play an important part. Heavy electrical and electronic equipment, on the other hand, contends in addition with regulatory and procurement elements of public agencies.

Over the period 1967 to 1978, the Canadian market for electrical and electronics products grew 9.7 percent per year from $2.7 billion in 1967 to $7.4 billion in 1978. Domestic sales in the Canadian market grew only 7.2 percent per year while imports rose 15.3 percent per year. In consequence, import penetration steadily rose over the period from 23 percent of the Canadian market in 1967 to 40.2 percent in 1978 (see Table 9.5).

The very rapid increase in both exports and imports relative to domestic sales to the Canadian market meant a corresponding rapid increase in total turnover (14.8 percent per annum).

At the same time, because imports rose more rapidly than exports, in absolute terms the trade deficit, which was $355 million in 1967, rose steadily to $1,907 in 1978. In relative terms, however, the trade balance to trade turnover ratio (normalized trade balance) in 1978 was not all that much larger than what it was in 1967 (47.7 percent versus 40.6 percent); however, the increase did not take place at a steady pace. The balance-to-turnover ratio declined (improved) from 1967 to 1970, increased (deteriorated) from 1970 to 1972, remained more-or-less unchanged at 50 percent from 1972 to 1975, increased (deteriorated) again in 1976 and 1977, but then improved once more in 1978.

Among the industries within this group, import penetration of the Canadian market generally ranged from 30 to 72 percent in 1978, the only exception being the wire and cable sector. In contrast to the export orientation of electronic sub-sectors, import penetration is substantial. While imports are more diversified than exports, three sub-sectors account for about two-thirds of all imports: communications equipment, electrical industrial equipment and radios or T.V.'s.

Household radios and T.V.'s and small electrical appliances led the electrical industries in their growth of imports over the period. The annual average increases were 21.2 and 17.3 percent respectively and in both instances exceeded export gains by large margins. An approximate doubling of import penetration over the period was experienced by radios and T.V.'s, major appliances and batteries. Other sub-sectors had smaller but still significant increases in penetration of the domestic market by imports.

TABLE 9.3

ELECTRICAL PRODUCTS INDUSTRIES: EXPORTS AND EXPORT ORIENTATION BY INDUSTRY, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
	(MILLIONS OF DOLLARS)											
DOMESTIC EXPORTS												
TOTAL	239	320	346	423	372	399	498	622	619	675	716	975
SMALL ELECTRICAL APPLIANCES MFRS.	6	5	7	6	4	6	11	21	19	14	13	12
MAJOR APPLIANCES (ELEC & NON-ELEC) MFRS.	15	24	30	35	31	41	53	68	55	66	80	106
HHOLD RADIO & TVS & PTS. MFRS, N.E.S.	25	30	31	29	29	27	32	33	27	31	55	95
COMMUNICATIONS EQUIPMENT MFRS.	106	163	167	199	185	189	266	318	322	362	346	459
ELECTRICAL INDUSTRIAL EQUIP. MFRS.	44	46	44	47	47	49	51	87	98	109	101	124
ELECTRIC WIRE & CABLE MFRS.	22	26	32	71	34	40	28	34	33	25	39	56
MISC. ELECTRICAL PRODUCTS MFRS.	18	20	24	29	33	37	43	52	56	62	73	111
BATTERY MFRS.	3	5	6	5	6	5	5	7	7	9	14	17
MISC. ELECTRICAL PRODUCTS N.E.S. MFRS.	14	15	18	24	27	32	38	44	48	53	59	94
EXPORT ORIENTATION	(PERCENT)											
TOTAL	10.3	13.3	13.3	15.8	13.3	13.0	14.1	14.3	13.5	14.3	14.8	17.9
SMALL ELECTRICAL APPLIANCES MFRS.	4.9	3.6	4.7	3.9	2.9	3.4	5.3	8.2	7.8	5.4	4.8	4.4
MAJOR APPLIANCES (ELEC & NON-ELEC) MFRS.	4.8	8.1	9.6	12.1	8.9	10.3	11.5	13.4	10.9	12.2	15.3	17.3
HHOLD RADIO & TVS & PTS. MFRS, N.E.S.	13.2	14.2	12.6	13.8	11.4	8.7	9.1	10.5	9.8	12.2	21.1	31.9
COMMUNICATIONS EQUIPMENT MFRS.	17.1	24.2	23.7	28.0	28.0	25.0	29.9	25.9	23.5	26.2	26.0	30.5
ELECTRICAL INDUSTRIAL EQUIP. MFRS.	10.1	10.6	9.5	9.1	8.8	9.4	8.5	11.4	10.8	10.6	9.0	9.9
ELECTRIC WIRE & CABLE MFRS.	7.0	8.1	9.0	16.1	8.1	9.2	5.3	5.0	5.0	3.8	5.8	7.3
MISC. ELECTRICAL PRODUCTS MFRS.	5.5	5.9	6.5	10.9	9.7	10.2	11.3	11.4	11.4	13.2	15.0	19.3
BATTERY MFRS.	5.8	8.5	9.5	8.5	7.4	6.2	6.0	7.5	6.8	6.9	10.0	11.0
MISC. ELECTRICAL PRODUCTS N.E.S. MFRS.	5.5	5.4	5.9	11.6	10.4	11.3	12.9	12.5	12.7	15.6	17.1	22.3

TABLE 9.4

ELECTRICAL PRODUCTS INDUSTRIES: SHIPMENTS AND IMPLICIT SELF-SUFFICIENCY[1] BY INDUSTRY, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
						(MILLIONS OF DOLLARS)						
FACTORY SHIPMENTS												
TOTAL	2,313	2,407	2,607	2,672	2,795	3,063	3,538	4,345	4,599	4,733	4,830	5,443
SMALL ELECTRICAL APPLIANCES MFRS.	128	143	147	143	144	170	206	252	248	253	273	266
MAJOR APPLIANCES (ELEC & NON-ELEC) MFRS.	310	293	311	287	349	397	463	511	504	547	524	613
HHOLD RADIO & TVS & PTS. MFRS, N.E.S.	189	207	243	213	256	310	352	315	274	254	260	299
COMMUNICATIONS EQUIPMENT MFRS.	619	674	705	712	660	756	889	1,225	1,368	1,383	1,331	1,506
ELECTRICAL INDUSTRIAL EQUIP. MFRS.	430	433	466	514	535	526	604	765	912	1,019	1,117	1,247
ELECTRIC WIRE & CABLE MFRS.	318	324	360	442	417	433	527	674	646	649	676	759
MISC. ELECTRICAL PRODUCTS MFRS.	318	333	376	270	339	367	381	452	488	466	485	575
BATTERY MFRS.	59	61	66	64	80	81	89	97	109	126	139	155
MISC. ELECTRICAL PRODUCTS N.E.S. MFRS.	260	272	310	206	259	286	292	355	379	340	346	420
SHIPMENTS/CANADIAN MARKET						(PERCENT)						
TOTAL	86.7	88.8	85.5	88.7	83.9	79.9	78.9	78.7	80.4	76.4	74.0	74.0
SMALL ELECTRICAL APPLIANCES MFRS.	74.0	74.0	71.3	71.6	68.5	66.1	66.2	64.8	62.2	53.8	53.8	48.4
MAJOR APPLIANCES (ELEC & NON-ELEC) MFRS.	90.5	89.6	88.7	90.4	88.2	86.4	88.1	83.1	84.5	82.2	82.6	85.3
HHOLD RADIO & TVS & PTS. MFRS, N.E.S.	84.0	79.7	74.8	71.3	68.9	60.3	60.3	53.5	55.3	42.0	41.6	41.8
COMMUNICATIONS EQUIPMENT MFRS.	85.2	93.4	83.9	94.7	87.0	79.8	78.8	81.6	86.6	82.8	75.9	75.9
ELECTRICAL INDUSTRIAL EQUIP. MFRS.	83.7	85.1	80.2	82.3	77.4	77.1	75.5	77.9	77.0	76.4	77.3	75.8
ELECTRIC WIRE & CABLE MFRS.	102.4	104.3	103.8	114.6	104.1	104.3	99.5	98.5	97.4	97.0	96.9	99.5
MISC. ELECTRICAL PRODUCTS MFRS.	87.5	87.8	85.7	81.2	85.1	82.9	81.1	78.7	79.2	75.9	73.9	75.6
BATTERY MFRS.	91.5	90.6	86.2	83.9	86.5	84.0	85.4	79.7	76.0	77.3	78.2	77.2
MISC. ELECTRICAL PRODUCTS N.E.S. MFRS.	86.6	87.1	85.6	80.5	84.7	82.6	79.8	78.4	80.2	75.4	72.2	75.1

[1] Ratio of Shipments to Canadian Market

TABLE 9.5

ELECTRICAL PRODUCTS INDUSTRIES: IMPORTS AND IMPORT PENETRATION BY INDUSTRY, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
	(MILLIONS OF DOLLARS)											
ADJUSTED IMPORTS												
TOTAL	594	623	789	764	908	1,171	1,442	1,795	1,741	2,133	2,409	2,883
SMALL ELECTRICAL APPLIANCES MFRS.	51	55	66	62	71	93	116	158	170	231	248	296
MAJOR APPLIANCES (ELEC & NON-ELEC) MFRS.	48	58	70	65	78	104	116	172	147	185	191	212
HHOLD RADIO & TVS & PTS. MFRS, N.E.S.	61	82	112	115	145	231	264	306	248	381	419	512
COMMUNICATIONS EQUIPMENT MFRS.	213	211	295	240	284	380	505	594	534	649	769	936
ELECTRICAL INDUSTRIAL EQUIP. MFRS.	127	122	160	157	203	206	248	305	370	389	428	522
ELECTRIC WIRE & CABLE MFRS.	15	13	19	15	17	22	31	44	50	45	61	60
MISC. ELECTRICAL PRODUCTS MFRS.	63	66	87	92	93	113	132	174	184	209	245	296
BATTERY MFRS.	9	11	17	18	18	20	21	32	42	46	53	63
MISC. ELECTRICAL PRODUCTS N.E.S. MFRS.	54	55	70	74	74	92	112	142	142	163	192	233
IMPORT PENETRATION	(PERCENT)											
TOTAL	22.3	23.0	25.9	25.3	27.3	30.5	32.2	32.5	30.4	34.5	36.9	39.2
SMALL ELECTRICAL APPLIANCES MFRS.	29.6	28.7	32.1	31.2	33.5	36.1	37.3	40.5	42.6	49.1	48.8	53.8
MAJOR APPLIANCES (ELEC & NON-ELEC) MFRS.	13.9	17.6	19.8	20.6	19.6	22.6	22.0	28.0	24.7	27.8	30.1	29.4
HHOLD RADIO & TVS & PTS. MFRS, N.E.S.	27.1	31.6	34.6	38.6	39.0	44.9	45.2	52.1	50.2	63.1	67.2	71.6
COMMUNICATIONS EQUIPMENT MFRS.	29.4	29.2	32.2	31.9	37.4	40.1	44.8	39.5	33.8	38.9	43.8	47.2
ELECTRICAL INDUSTRIAL EQUIP. MFRS.	24.8	24.0	27.5	25.2	29.4	30.1	30.9	31.0	31.3	29.9	29.6	31.7
ELECTRIC WIRE & CABLE MFRS.	4.8	4.2	5.5	3.9	4.3	5.2	5.8	6.4	7.5	6.7	8.7	7.8
MISC. ELECTRICAL PRODUCTS MFRS.	17.4	17.5	19.9	27.6	23.2	25.5	28.1	30.3	29.8	34.1	37.3	38.9
BATTERY MFRS.	13.9	17.1	22.0	23.2	19.9	21.2	19.7	26.3	29.2	28.1	29.6	31.3
MISC. ELECTRICAL PRODUCTS N.E.S. MFRS.	18.1	17.5	19.4	28.9	24.2	26.7	30.5	31.4	30.0	36.3	40.1	41.6

9.3 CANADA'S SHARE OF OECD IMPORTS, 1967 TO 1978

Total OECD imports of electrical products in 1977 amounted to just over $41 billion U.S., of which $580 million or 1.4 percent was supplied by Canada.

The major suppliers, West Germany and Japan, each accounted for over a sixth of total imports, followed closely by the developing countries as a group and the United States (Table 9.6). West Germany's share since the late 1960's has fallen, while that of Japan has increased by more than half. The growth of the developing countries has been much more dramatic, increasing by more than fivefold. In the meantime, the United States saw its relative position weaken as competition increased from Japan and the developing countries with their lower-cost labour markets. The nine countries now comprising the EEC together accounted for over half of OECD imports in 1967, but since that time showed a relative decline that has been slightly more rapid than that of the United States. The share of other industrial countries has on the other hand remained fairly stable over the years, as has the smaller share of the centrally planned economies.

Canada's share since 1967 has varied. From 2.8 percent of the OECD import total at the beginning of the period, the Canadian share edged upwards to 3.0 percent in 1970 then generally declined. Largely, the rising share up to 1970 reflects Canada's heavy concentration in the U.S. market (Table 9.7). Canada's share in the U.S. market was actually in decline from the early 1960's. But the U.S. market itself was growing at an unusually rapid rate prior to 1970 - sufficient to cause Canada's share of the OECD actually to rise. By the 1970's, U.S. involvement in Viet Nam wound down, and with it substantial sales by Canada under the defence production sharing arrangements. Canadian shares of both Japanese and EEC imports also tended to weaken. In terms of trade with developing countries, Canada's relative position has remained steady at about 1.5 percent for most of the period.

In broad terms the profile or structure of Canadian exports resembles the pattern of overall import requirements of the OECD. In more specific terms, telecommunications and transistors currently make up over two-fifths of Canadian sales to the OECD imports from all sources. These products are also situated in the faster growing end of the OECD import spectrum. Canada is less heavily concentrated in commodities which have grown at approximately the same rate as overall imports by the industrialized countries (20 percent per annum in the last 10 years). As a result, a large proportion of Canada's export sales are grouped in the less dynamic areas of the market, notably in power machinery and equipment. The Canadian shares of such items as electric lamps, lighting fixtures, non-electrical appliances and sewing machines have, however, increased. These, though, are among Canada's less important exports in terms of dollar value, and have also been among the slower growing products imported by the OECD. Table 9.10 provides specific data.

TABLE 9.6

ELECTRICAL PRODUCTS: OECD IMPORTS BY SOURCE[1]

DISTRIBUTION AND AVERAGE ANNUAL RATE OF CHANGE

	DISTRIBUTION percent											Percent Change
	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1967-1977
Total Imports	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	
Developed Market Economies												
Japan	12.6	14.7	15.7	15.1	16.2	17.5	15.5	13.9	13.5	18.0	18.1	3.7
West Germany	19.1	18.7	18.7	18.8	18.6	17.8	18.7	18.5	18.0	17.0	16.9	- 1.2
United States	17.9	16.6	16.3	15.3	13.6	12.6	12.4	13.4	12.8	12.3	11.6	- 4.2
Italy	6.7	7.0	6.8	6.5	6.6	6.5	6.0	5.8	6.2	5.3	5.4	- 2.1
Netherlands	7.9	7.4	6.9	6.8	6.8	6.3	6.2	5.6	6.3	5.7	5.3	- 3.9
France	4.4	4.4	4.5	4.9	4.8	4.8	5.3	5.4	5.7	5.0	5.1	1.5
United Kingdom	8.6	7.6	7.2	6.7	6.8	5.9	5.3	5.2	5.5	4.7	4.8	- 5.7
Belgium-Luxembourg	3.5	3.1	3.1	3.6	3.4	3.7	3.5	3.4	4.0	3.5	3.3	- 0.6
Sweden	3.0	2.9	2.6	2.8	3.1	3.0	3.0	2.8	3.2	2.9	2.7	- 1.0
Canada	2.8	3.3	2.9	3.0	2.4	1.8	1.7	1.8	1.7	1.4	1.4	- 6.7
Total EEC (9)	52.2	50.3	49.1	49.1	48.7	46.8	46.6	45.7	47.5	42.8	42.5	- 2.0
Other Developed Market Economies	7.9	7.7	7.9	8.6	8.7	8.8	9.2	9.1	9.4	8.5	8.7	1.0
OPEC	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	--
Other Developing Market Economies	2.5	3.4	4.2	4.9	4.3	8.2	10.4	12.1	10.4	12.8	13.6	18.5
Taiwan	0.5	..	0.9	1.2	..	2.7	3.1	3.1	2.3	3.1	3.2	20.4
Centrally Planned Economies	1.0	1.1	1.1	1.0	2.8	1.1	1.2	1.1	1.2	1.2	1.2	1.8
ADDENDUM												
Total Imports in Millions of U.S. Dollars	6,815	7,783	9,895	12,116	13,397	16,946	23,672	29,090	29,950	36,211	41,059	

TABLE 9.7

ELECTRICAL PRODUCTS: PERCENTAGE OF CANADA'S EXPORTS BY DESTINATION[2]

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	OECD Share 1977
O.E.C.D.	83.2	82.9	84.9	84.8	81.9	76.0	77.0	76.8	70.8	72.0	77.3	100.0
United States	72.3	70.4	73.4	66.9	64.8	59.5	60.8	59.2	55.1	55.7	59.5	77.0
Japan	0.4	0.3	0.5	0.6	0.4	0.7	0.7	0.8	0.7	0.5	0.7	0.9
E.E.C. (9)	7.5	6.8	5.6	11.3	12.0	10.4	11.3	10.9	8.7	8.5	10.4	13.5
United Kingdom	4.8	3.7	3.0	6.9	8.5	7.2	7.4	5.5	4.2	3.8	5.6	7.2
Rest of World	16.8	17.1	15.1	15.2	18.1	24.0	23.0	23.2	29.2	28.0	22.7	

1 For source and notes see Table 2.6.

2 For source and notes see Table 2.7.

TABLE 9.8

ELECTRICAL PRODUCTS: GROWTH OF FOREIGN IMPORTS[1]
(percent)

	OECD	U.S.A.	JAPAN	EEC (9)*	OTHER OECD	DEVELOPING COUNTRIES**
1967	-	-	-	-	-	-
1968	14.2	32.7	18.2	10.5	9.1	17.4
1969	27.1	31.2	32.8	30.4	24.5	13.8
1970	22.4	15.0	51.4	33.5	21.2	15.5
1971	10.6	13.3	-11.0	7.2	11.8	5.7
1972	26.5	34.2	13.5	31.3	22.7	29.3
1973	39.7	29.4	77.0	52.7	38.5	33.6
1974	22.9	14.6	35.8	23.0	25.5	39.2
1975	3.0	-10.7	-10.9	5.1	8.0	29.9
1976	20.9	53.8	37.5	18.4	11.0	30.1
1977	13.4	14.6	-2.1	21.8	10.9	22.3

TABLE 9.9

ELECTRICAL PRODUCTS: CANADA'S TRADE SHARE BY MARKET[1]
(percent)

1967	2.8	11.5	4.6	1.8	0.2	1.5
1968	3.3	12.0	3.0	2.0	0.3	2.0
1969	2.9	10.5	1.7	1.6	0.3	1.7
1970	3.0	10.9	0.6	2.4	0.3	1.8
1971	2.4	8.5	0.5	2.2	0.2	1.8
1972	1.8	5.8	0.6	1.5	0.2	2.1
1973	1.7	6.0	0.7	1.4	0.2	1.9
1974	1.8	6.8	0.7	1.3	0.2	1.7
1975	1.7	7.2	0.3	1.1	0.2	1.7
1976	1.4	4.6	0.2	0.9	0.2	1.4
1977	1.4	4.8	0.3	0.9	0.2	0.9

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[1] For source and notes see Table 2.8.

TABLE 9.10

ELECTRICAL PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE OECD[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
			Total OECD Imports		Imports from Canada	
	Total of OECD Imports	Imports from Canada	1967	1977	1967	1977
TOTAL, ELECTRICAL PRODUCTS	19.7	11.9	100.0	100.0	100.0	100.0
Domestic stoves, boilers, cookers, etc.	13.8	16.4	1.4	0.8	0.6	0.8
Sewing machines	13.4	38.1	3.6	2.1	0.3	2.3
Non-electrical domestic appliances	16.7	24.8	0.8	0.6	0.3	1.0
Electric power machinery and switchgear	17.6	14.3	22.9	19.2	20.6	25.4
Equipment for distributing electricity	15.3	6.2	4.7	3.2	12.3	7.3
Telecommunications apparatus	21.9	10.4	24.9	30.0	42.4	37.0
Domestic electrical equipment	19.3	14.8	10.3	10.0	2.9	3.7
Batteries and accumulators	21.3	16.7	1.7	1.9	1.6	2.4
Electric Lamps	17.7	19.7	2.7	2.3	1.3	2.5
Thermionic valves and tubes, etc.	24.4	15.9	9.1	13.4	4.4	6.2
Accelerators	14.4	6.7	0.1	..	-	0.2
Electrical machinery, n.e.s.	18.0	9.1	8.6	7.4	12.7	9.9
Lighting fixtures and fittings	16.8	20.3	2.6	2.0	0.4	0.9
Phonographs, recorders, etc.	20.1	22.0	6.6	6.9	0.2	0.5

TABLE 9.11

ELECTRICAL PRODUCTS: CANADA'S SHARE OF IMPORTS BY OECD[1]
(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, ELECTRICAL PRODUCTS	2.8	3.3	2.9	3.0	2.4	1.8	1.7	1.8	1.7	1.4	1.4
Domestic stoves, boilers, cookers, etc.	1.1	0.6	0.9	0.7	0.9	0.8	0.9	0.9	1.4	1.0	1.4
Sewing machines	0.2	0.1	0.4	0.1	0.9	1.6	1.6	1.5	1.3	1.4	1.5
Non-electrical domestic appliances	1.1	2.8	1.3	1.9	3.1	2.8	1.8	2.8	2.5	2.3	2.2
Electric power machinery and switchgear	2.5	2.5	2.4	2.5	2.3	1.7	1.7	2.0	1.9	1.9	1.9
Equipment for distributing electricity	7.3	9.3	9.6	13.0	7.0	5.3	4.9	4.3	4.1	3.9	3.2
Telecommunications apparatus	4.7	6.0	5.3	4.5	3.7	2.2	2.1	2.4	2.0	1.5	1.7
Domestic electrical equipment	0.8	0.9	1.1	0.8	0.5	0.6	0.7	0.8	0.6	0.5	0.5
Batteries and accumulators	2.6	3.8	3.6	2.9	2.3	1.9	1.6	1.6	1.2	1.2	1.8
Electric Lamps	1.3	1.7	1.4	2.2	2.1	2.2	2.1	1.7	1.7	1.5	1.5
Thermionic valves and tubes, etc.	1.3	2.2	1.4	2.2	2.6	1.9	1.6	1.4	1.6	0.7	0.7
Accelerators	-	-	-	-	-	0.1	..	..	0.1	1.6	6.7
Electrical machinery, n.e.s.	4.1	4.0	2.7	2.4	2.1	2.4	2.4	1.8	1.8	1.6	1.9
Lighting fixtures and fittings	0.5	0.6	0.7	0.6	0.8	0.9	0.8	0.6	0.6	0.7	0.6
Phonographs, recorders, etc.	0.1	0.1	0.2	0.3	0.2	0.1	0.1	0.1	0.1	0.1	0.1

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1 For source and notes see Table 2.8.

TABLE 9.12

ELECTRICAL PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE USA[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
	Total U.S.A. Imports	Imports from Canada	Total U.S.A. Imports 1967	Total U.S.A. Imports 1977	Imports from Canada 1967	Imports from Canada 1977
TOTAL, ELECTRICAL PRODUCTS	21.7	11.4	100.0	100.0	100.0	100.0
Domestic stoves, boilers, cookers, etc.	28.8	25.3	0.3	0.6	0.3	0.9
Sewing machines	11.1	48.0	6.2	2.5	0.2	2.6
Non-electrical domestic appliances	19.8	25.4	1.2	1.0	0.4	1.3
Electric power machinery and switchgear	22.1	15.4	9.9	10.2	19.1	27.2
Equipment for distributing electricity	10.1	5.7	6.1	2.3	14.3	8.5
Telecommunications apparatus	21.5	8.3	40.0	39.4	48.4	36.3
Domestic electrical equipment	27.5	22.6	3.6	5.7	1.6	4.1
Batteries and accumulators	15.9	18.4	1.2	0.8	1.1	2.1
Electric lamps	16.4	34.5	1.6	1.1	0.2	1.3
Thermionic valves and tubes, etc.	31.0	10.6	7.6	15.9	4.4	4.1
Accelerators	-	-	-	-	-	-
Electrical machinery, n.e.s.	18.2	12.2	8.4	6.3	9.6	10.2
Lighting fixtures and fittings	12.0	21.0	2.4	1.1	0.4	0.9
Phonographs, recorders, etc.	23.5	26.5	11.4	13.3	0.1	0.5

TABLE 9.13

ELECTRICAL PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE UNITED STATES[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, ELECTRICAL PRODUCTS	11.5	12.0	10.5	10.9	8.5	5.8	6.0	6.8	7.2	4.6	4.8
Domestic stoves, boilers, cookers, etc.	10.2	4.1	8.1	6.7	7.2	5.1	7.6	6.7	9.2	7.0	7.8
Sewing machines	0.3	2.9	3.7	3.1	2.2	4.5	5.1	4.8	4.4	4.2	4.9
Non-electrical domestic appliances	3.7	7.6	3.8	6.1	7.1	5.8	3.9	11.4	8.3	5.7	5.9
Electric power machinery and switchgear	22.2	20.1	21.4	21.8	18.4	11.8	13.9	16.3	17.3	14.8	12.7
Equipment for distributing electricity	26.9	36.9	38.7	47.8	33.5	26.6	27.2	25.9	26.4	21.6	17.9
Telecommunications apparatus	13.9	14.4	11.8	10.6	9.4	5.6	5.8	7.1	7.0	3.6	4.4
Domestic electrical equipment	5.1	7.1	7.3	5.1	3.5	3.2	5.0	7.4	5.2	3.7	3.5
Batteries and accumulators	10.7	18.1	20.8	19.4	15.9	11.9	11.9	7.7	9.1	8.4	13.3
Electric lamps	1.4	5.8	6.8	8.4	8.2	7.9	8.0	5.6	6.4	5.7	5.7
Thermionic valves and tubes, etc.	6.7	8.2	5.7	4.2	4.3	4.0	2.7	2.5	3.8	1.9	1.2
Accelerators	-	-	-	-	-	-	-	-	-	-	-
Electrical machinery, n.e.s.	13.2	12.4	9.9	12.1	10.2	10.4	9.4	7.4	8.8	6.4	7.8
Lighting fixtures and fittings	1.9	2.3	2.7	2.5	3.9	4.1	3.8	3.2	4.0	4.4	4.1
Phonographs, recorders, etc.	0.2	0.2	0.2	0.5	0.3	0.1	0.1	0.1	0.1	0.1	0.2

[1] For source and notes see Table 2.8.

TABLE 9.14

ELECTRICAL PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE E.E.C.[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
	Total E.E.C. Imports	Imports from Canada	Total E.E.C. Imports 1967	Total E.E.C. Imports 1977	Imports from Canada 1967	Imports from Canada 1977
TOTAL, ELECTRICAL PRODUCTS	22.7	14.5	100.0	100.0	100.0	100.0
Domestic stoves, boilers, cookers, etc.	30.9	- 4.8	0.4	0.7	2.7	0.4
Sewing machines	15.5	11.7	3.7	2.0	1.3	1.0
Non-electrical domestic appliances	22.7	7.3	0.3	0.3	0.2	0.1
Electric power machinery and switchgear	18.4	7.6	26.1	18.3	35.9	19.2
Equipment for distributing electricity	19.2	18.3	3.1	2.3	2.4	3.4
Telecommunications apparatus	28.9	21.2	18.2	30.0	18.5	32.8
Domestic electrical equipment	26.2	- 1.0	4.1	5.4	13.5	3.2
Batteries and accumulators	25.3	12.7	1.6	1.9	3.6	3.0
Electric lamps	22.6	13.3	1.5	1.5	5.7	5.1
Thermionic valves and tubes, etc.	23.6	28.8	17.1	18.6	5.8	18.9
Accelerators	10.4	n.a.	0.8	0.1	-	1.4
Electrical machinery, n.e.s.	20.4	15.8	9.0	7.5	8.9	10.0
Lighting fixtures and fittings	16.7	14.8	2.3	1.4	0.6	0.6
Phonographs, recorders, etc.	20.0	13.3	12.4	10.0	1.0	0.9

TABLE 9.15

ELECTRICAL PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE E.E.C. (EXCLUDING INTRA-TRADE)[1] (percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, ELECTRICAL PRODUCTS	1.8	2.0	1.6	2.4	2.2	1.5	1.4	1.3	1.1	0.9	0.9
Domestic stoves, boilers, cookers, etc.	13.0	7.1	6.2	2.5	2.9	2.1	1.9	1.6	0.9	0.3	0.5
Sewing machines	0.6	0.3	0.2	0.1	0.3	0.1	0.1	0.1	0.1	0.1	0.4
Non-electrical domestic appliances	1.1	0.2	2.2	1.4	1.3	1.9	1.2	0.8	0.9	1.2	0.3
Electric power machinery and switchgear	2.4	2.2	1.7	1.6	2.1	1.6	1.3	1.5	1.4	1.1	0.9
Equipment for distributing electricity	1.4	0.7	4.3	1.6	2.3	2.7	1.9	2.1	1.9	1.6	1.3
Telecommunications apparatus	1.8	2.5	2.3	2.8	1.0	0.7	0.7	1.0	0.6	0.8	1.0
Domestic electrical equipment	5.8	4.2	1.9	1.8	0.9	0.7	0.1	0.7	0.5	0.3	0.5
Batteries and accumulators	4.0	3.8	2.6	2.0	2.2	1.4	0.7	1.0	0.8	1.0	1.4
Electric lamps	6.6	6.1	3.7	6.0	5.0	5.5	4.5	4.1	4.0	3.5	3.0
Thermionic valves and tubes, etc.	0.6	2.0	1.2	4.7	6.0	3.6	3.3	2.1	2.1	0.9	0.9
Accelerators	-	-	-	-	-	-	..	0.1	0.1	3.6	14.4
Electrical machinery, n.e.s.	1.8	1.6	1.5	2.1	1.8	2.1	2.0	1.6	1.9	2.0	1.2
Lighting fixtures and fittings	0.5	0.4	0.4	0.4	0.6	0.4	0.3	0.4	0.6	0.5	0.4
Phonographs, recorders, etc.	0.1	0.2	0.5	0.4	0.3	0.1	0.1	0.1	0.1	0.1	0.1

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1 For source and notes see Table 2.8.

CHAPTER X

TRADE IN CHEMICALS AND CHEMICAL PRODUCTS

CHAPTER X
TRADE IN CHEMICALS AND CHEMICAL PRODUCTS

10.1 CHARACTERISTICS OF THE DOMESTIC INDUSTRIES

The chemical and chemical products industries group[1] includes mixed fertilizers, plastics and synthetic resins, pharmaceuticals and medicines. It also contains industries manufacturing paints and varnishes, soaps and cleaning compounds, and toilet preparations. However, the largest sub-group of chemicals production is that of industrial chemical producers which provide many intermediate chemical products used by the chemical industries themselves as well as by other industries in their production processes. Miscellaneous chemical industries procuring various speciality products, like explosives, adhesives, polishes and household chemical compounds, round off the activities of this industry group.

In 1974, concentration in this industry[2] group was slightly below the manufacturing average. The weighted average of the four leading enterprises was 46.4 percent of value added. Manufacturers of mixed fertilizers, soaps and cleaning compounds, pigments and printing inks as well as organic industrial chemicals had a concentration of value added considerably higher than the average. However, inorganic industrial chemicals, paint and varnish manufacturers, pharmaceutical and miscellaneous chemical industries experienced noticeably lower concentration of both value added and employment.

Foreign ownership[3], at the same time, was quite significant in this group. In 1974, close to 38 percent of establishments were owned in the United States and 14 percent in other foreign countries, for close to 52 percent total foreign ownership. On the basis of shipments, the U.S. controlled three fifths, other foreign interests another fifth for a total of four fifths. Employment was about similarly divided with only a slightly smaller overall percentage of 77 percent.

In 1978, chemical industries shipments provided close to $8 million of manufacturing output for a share of 6.1 percent. Table 10.1 summarizes other selected indicators and gives a good indication of the overall group performance and its relative importance to manufacturing. It shows that chemical product exports rose at a considerably higher rate of growth than shipments and a moderately higher rate than imports. Nevertheless, imports still occupied a considerably higher share of total manufacturing imports than was the case for exports.

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1 1970 SIC codes 372 to 379

2 See corresponding note on page 23.

3 See corresponding note on page 23.

TABLE 10.1

CHEMICALS AND CHEMICAL PRODUCTS

SELECTED INDICATORS

	1967	1978	Average Annual Rate of Growth 1967-1978	1978 Share of Total Manufacturing Activity
			(percent)	
REAL DOMESTIC PRODUCT (Constant $, millions)	894.2	1,693.5	6.0	6.7
SHIPMENTS ($ millions)	2,269	7,950	12.1	6.1
DOMESTIC EXPORTS ($ millions)	328	1,926	17.5	4.9
IMPORTS LESS RE-EXPORTS ($ millions)	575	2,868	15.7	6.9
EMPLOYMENT (000's)	71	79	1.0	5.0
PROFITS ($ millions)	302	802	9.3	6.1
INVESTMENT ($ millions)	371.2	1,786.3	15.4	18.6

Source: See Table 2.1.

10.2 TRADE DEVELOPMENTS, 1967 TO 1978

Trade in chemical products increased very significantly between 1967 and 1978. Exports rose from $328 million to more than $1.9 billion, and imports from $575 million to close to $2.9 billion. The rising trend in trade was reflected in the trade measueres with export orientation advancing from 14.5 percent to about 24 percent in 1978, and import penetration from 23 percent in 1967 to 32 percent in 1978. Although the implicit self-sufficiency of the industry fell off during the period, particularly in 1974, it did bounce back to close the period much as it began at around 90 percent of the domestic market (See Tables 10.2 and 10.4).

The "normalized" deficit, at 27.3 percent in 1967 was similarly enlarged to 38.7 percent in 1974 but subsequently reduced to less than 20 percent in 1978 with the general trade recovery of the last three years. The trade interdependence of the chemical group is about in line with overall manufacturing. The sector is specialized in some lines where both the export orientation and import penetration are above average, while at the same time several chemical sectors produce mainly for the domestic market and their involvement in trade (exports or imports) is quite small.

CHART 10.1

CHEMICALS AND CHEMICAL PRODUCTS INDUSTRIES: SELECTED TRADE MEASURES

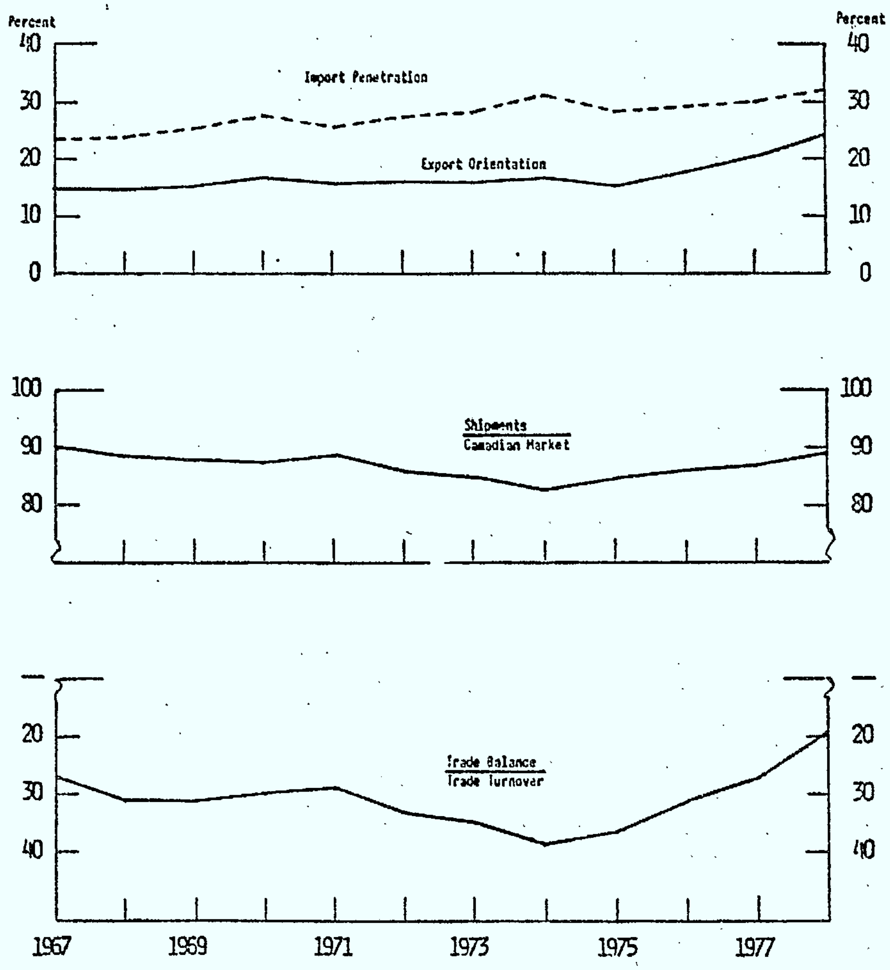

TABLE 10.2

CHEMICALS AND CHEMICAL PRODUCTS: TRADE MEASURES, 1967 TO 1978

YEAR	DOMESTIC EXPORTS	ADJUSTED IMPORTS[1]	TRADE BALANCE	TRADE TURNOVER (EXPORTS + IMPORTS)	CANADIAN FACTORY SHIPMENTS	CANADIAN MARKET[2]	TRADE BALANCE / TRADE TURNOVER	SHIPMENTS / CANADIAN MARKET	EXPORT ORIENTATION	IMPORT PENETRATION
	(MILLIONS OF DOLLARS)						(PERCENT)			
1967	328	575	-247	903	2,269	2,516	-27.3	90.2	14.5	22.9
1968	343	649	-307	992	2,429	2,735	-30.9	88.8	14.1	23.7
1969	390	742	-352	1,133	2,582	2,934	-31.1	88.0	15.1	25.3
1970	433	801	-368	1,235	2,621	2,989	-29.8	87.7	16.5	26.8
1971	432	784	-352	1,217	2,782	3,134	-28.9	88.8	15.5	25.0
1972	461	934	-473	1,396	2,943	3,416	-33.9	86.2	15.7	27.3
1973	553	1,157	-604	1,710	3,504	4,107	-35.3	85.3	15.8	28.2
1974	756	1,709	-953	2,464	4,608	5,560	-38.7	82.9	16.4	30.7
1975	786	1,692	-907	2,478	5,107	6,014	-36.6	84.9	15.4	28.1
1976	1,020	1,935	-915	2,956	5,704	6,619	-31.0	86.2	17.9	29.2
1977	1,319	2,290	-971	3,609	6,535	7,506	-26.9	87.1	20.2	30.5
1978	1,926	2,868	-942	4,793	7,950	8,892	-19.7	89.4	24.2	32.2

[1]Total imports less re-exports; [2]Shipments plus imports less exports.

TABLE 10.3

CHEMICALS AND CHEMICAL PRODUCTS: EXPORTS AND EXPORT ORIENTATION BY INDUSTRY, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
						(MILLIONS OF DOLLARS)						
DOMESTIC EXPORTS												
TOTAL	328	343	390	433	432	461	553	756	786	1,020	1,319	1,926
MIXED FERTILIZERS MFRS.	16	18	18	46	41	43	34	50	52	51	109	146
PLASTICS, SYNTHETIC RESINS MFRS.	15	15	21	23	22	30	35	38	38	49	74	126
PHARMACEUTICALS & MEDICINES MFRS.	20	17	22	26	25	29	39	41	44	44	50	59
PAINT & VARNISH MFRS.	2	2	1	1	2	2	3	4	4	5	5	7
SOAP & CLEANING COMPOUNDS MFRS.	1	1	1	1	1	1	1	2	2	3	4	6
TOILET PREPARATIONS MFRS.	1	1	1	2	2	2	2	5	3	3	5	7
INDUSTRIAL CHEMICALS MFRS.	239	249	279	299	305	318	396	557	576	806	1,003	1,470
MISC. CHEMICAL INDUSTRIES	34	40	46	36	34	35	43	59	65	59	69	104
						(PERCENT)						
EXPORT ORIENTATION												
TOTAL	14.5	14.1	15.1	16.5	15.5	15.7	15.8	16.4	15.4	17.9	20.2	24.2
MIXED FERTILIZERS MFRS.	15.4	22.4	24.5	63.7	56.6	61.1	42.4	44.5	36.7	39.6	47.5	82.9
PLASTICS, SYNTHETIC RESINS MFRS.	9.3	8.8	11.1	12.0	10.7	12.8	11.5	8.3	8.2	9.3	12.4	17.1
PHARMACEUTICALS & MEDICINES MFRS.	6.7	5.2	6.3	6.6	5.7	6.3	7.5	7.0	6.8	6.3	6.5	6.2
PAINT & VARNISH MFRS.	1.0	0.9	0.6	0.5	0.6	0.6	0.9	0.9	0.8	0.9	1.0	1.1
SOAP & CLEANING COMPOUNDS MFRS.	0.4	0.2	0.2	0.3	0.3	0.4	0.5	0.4	0.5	0.7	0.8	1.1
TOILET PREPARATIONS MFRS.	1.3	1.0	0.8	1.0	1.5	1.3	1.0	2.1	1.3	1.9	1.3	1.5
INDUSTRIAL CHEMICALS MFRS.	30.0	29.4	31.2	33.3	32.1	32.9	33.1	34.1	31.0	36.3	38.6	45.3
MISC. CHEMICAL INDUSTRIES	9.5	9.9	10.7	8.8	8.0	7.3	7.4	7.5	7.8	6.7	7.1	8.2

TABLE 10.4

CHEMICALS AND CHEMICAL PRODUCTS: SHIPMENTS AND IMPLICIT SELF-SUFFICIENCY[1] BY INDUSTRY, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
						(MILLIONS OF DOLLARS)						
FACTORY SHIPMENTS												
TOTAL	2,269	2,429	2,582	2,621	2,782	2,943	3,504	4,608	5,107	5,704	6,535	7,950
MIXED FERTILIZERS MFRS.	101	78	75	72	72	71	79	113	143	130	229	177
PLASTICS, SYNTHETIC RESINS MFRS.	162	168	194	194	211	235	302	462	456	529	597	737
PHARMACEUTICALS & MEDICINES MFRS.	296	326	357	387	433	463	519	580	654	699	766	948
PAINT & VARNISH MFRS.	213	236	242	247	259	281	322	414	464	497	532	648
SOAP & CLEANING COMPOUNDS MFRS.	223	240	244	258	262	273	301	379	414	438	489	501
TOILET PREPARATIONS MFRS.	117	127	149	156	163	178	201	237	277	312	400	423
INDUSTRIAL CHEMICALS MFRS.	796	847	891	896	952	967	1,197	1,635	1,858	2,221	2,601	3,245
MISC. CHEMICAL INDUSTRIES	361	407	429	410	430	475	583	789	842	878	982	1,272
SHIPMENTS/CANADIAN MARKET						(PERCENT)						
TOTAL	90.2	88.8	88.0	87.7	88.8	86.2	85.3	82.9	84.9	86.2	87.1	89.4
MIXED FERTILIZERS MFRS.	110.6	118.5	126.8	249.9	197.0	215.8	146.7	153.4	132.1	136.3	164.7	356.7
PLASTICS, SYNTHETIC RESINS MFRS.	61.3	56.6	57.7	58.4	57.7	55.8	56.9	53.3	61.0	59.4	58.4	59.2
PHARMACEUTICALS & MEDICINES MFRS.	91.7	90.5	90.1	89.0	89.7	88.9	89.0	85.8	85.0	85.1	83.6	92.9
PAINT & VARNISH MFRS.	95.6	95.7	94.4	94.1	94.1	93.1	92.7	92.6	91.1	91.3	90.1	89.6
SOAP & CLEANING COMPOUNDS MFRS.	97.0	96.8	96.9	97.0	96.6	96.1	96.0	95.9	95.2	95.3	95.0	94.5
TOILET PREPARATIONS MFRS.	94.9	94.1	94.7	94.9	95.6	94.0	93.2	93.2	92.1	91.7	92.2	90.6
INDUSTRIAL CHEMICALS MFRS.	98.8	97.4	96.9	92.9	99.5	95.4	95.7	93.6	94.4	100.5	102.5	107.4
MISC. CHEMICAL INDUSTRIES	79.2	79.2	77.2	76.7	74.7	72.8	71.8	71.6	71.7	69.8	69.5	69.3

1 Ratio of shipments to Canadian market

A brief scan of the export orientation of the listed chemical industries, Table 10.3, indicates a significant dispersion of the measure among the industries shown. Two industries, however, mixed fertilizers and industrial chemicals, clearly stand out with larger than 15 percent shares of their shipments exported. Their average export orientation during the 1967-1978 period was more than one-third, and at times much larger than this.

Over time, both industries show a heavy dependence on trade. Mixed fertilizers have been increasingly drawn into international markets with their export growth of 22.6 percent annually between 1967 and 1978 stimulating production relative to the domestic market. Although a relatively small industry, their exports have contributed in mitigating the growth in the chemical sector's "normalized" trade deficit and in furthering the sector's specialization and trade interdependence.

Industrial chemicals industries, the largest sub-sector of chemicals, experienced an export orientation of shipments of more than one-third over the period. But while this sector's dependence on trade is higher than that of mixed fertilizers, this results from a much stronger weight in industrial chemicals imports. Specialization of production within this group of industries and in the international markets has been a characteristic of the industry for some time. Canada, to a large extent, is an active participant in this interdependence.

The chemical industries producing mainly for the domestic market supply approximately one-fifth of Canada's requirements for chemcals. The group accounts for soap and cleaning compounds, toilet preparations, and paint and varnish products. Clearly, their involvement in trade, as shown in Tables 10.3 and 10.5, is quite small. Their export orientation was generally below 2 percent and the import penetration of the domestic market up to 1978 was less than 12 percent.

In summary, the domestic market oriented industries saw few changes in their export orientation over the period. Their production, almost completely sold in the Canadian market, has kept up with the increasing market requirements and was only to a small extent supplemented by imports of specialties not produced in Canada. Over the 1967-1978 period this small import dependence increased.

Clearly, three industries in the chemical sector experienced below average export orientation for this industry group, and near-average or above-average import penetration of the domestic market. Pharmaceuticals, plastics and synthetic resins and miscellaneous chemical industries appear in this group. Typically the export orientation of these industries is low, averaging up to 10 percent or less. The import penetration, however, is several times higher.

TABLE 10.5

CHEMICALS AND CHEMICAL PRODUCTS: IMPORTS AND IMPORT PENETRATION BY INDUSTRY, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
	(MILLIONS OF DOLLARS)											
ADJUSTED IMPORTS												
TOTAL	575	649	742	801	784	934	1,157	1,709	1,692	1,935	2,290	2,868
MIXED FERTILIZERS MFRS.	6	5	3	3	5	5	8	11	18	17	19	19
PLASTICS, SYNTHETIC RESINS MFRS.	117	143	164	161	177	216	264	443	330	411	499	635
PHARMACEUTICALS & MEDICINES MFRS.	47	51	61	74	74	87	103	136	160	167	200	131
PAINT & VARNISH MFRS.	12	13	16	17	18	23	28	37	49	52	64	82
SOAP & CLEANING COMPOUNDS MFRS.	8	9	8	9	10	12	14	18	23	25	29	35
TOILET PREPARATIONS MFRS.	8	9	10	10	10	14	17	22	27	31	39	52
INDUSTRIAL CHEMICALS MFRS.	249	272	307	367	310	365	451	669	688	794	940	1,245
MISC. CHEMICAL INDUSTRIES	129	147	173	161	180	212	272	372	398	439	500	668
IMPORT PENETRATION	(PERCENT)											
TOTAL	22.9	23.7	25.3	26.8	25.0	27.3	28.2	30.7	28.1	29.2	30.5	32.2
MIXED FERTILIZERS MFRS.	6.4	8.1	4.3	9.2	14.5	16.0	15.5	14.9	16.4	17.6	13.5	38.9
PLASTICS, SYNTHETIC RESINS MFRS.	44.4	48.3	48.7	48.6	48.4	51.4	49.6	51.1	44.1	46.1	48.8	51.0
PHARMACEUTICALS & MEDICINES MFRS.	14.5	14.3	15.5	16.9	15.4	16.8	17.7	20.2	20.8	20.3	21.8	12.9
PAINT & VARNISH MFRS.	5.4	5.2	6.2	6.4	6.5	7.5	8.2	8.3	9.7	9.5	10.8	11.3
SOAP & CLEANING COMPOUNDS MFRS.	3.4	3.5	3.3	3.4	3.7	4.3	4.4	4.6	5.3	5.4	5.7	6.6
TOILET PREPARATIONS MFRS.	6.3	6.8	6.1	6.1	5.8	7.2	7.8	8.8	9.1	9.2	9.1	11.0
INDUSTRIAL CHEMICALS MFRS.	30.9	31.3	33.4	38.0	32.4	36.0	36.0	[illegible]	34.9	35.9	37.0	41.2
MISC. CHEMICAL INDUSTRIES	28.3	28.6	31.1	30.1	31.3	32.5	33.5	33.8	33.9	34.9	35.4	36.4

There is a persistent product dependence on imports, which account for more than one-third of Canadian apparent consumption of miscellaneous chemical industries and close to a half for plastics and synthetic resins. In general the reasons for this include a long list of interrelated elements concerning specific product lines, size of the market and optimum plant, tariffs, health and drug regulations, technology as well as research and development.

Over time, the three industries experienced a slightly higher rate of growth for their products in the Canadian market. As a result, changes in their export pattern were small and insignificant. A very modest increase in export orientation occurred in the 1960's for all three but in the seventies the gains were only partly retained. Import penetration, however, was more persistent through the period, especially for pharmaceutical products and medicines. Miscellaneous chemicals and plastics and synthetic resins experienced divergent and particularly offsetting trends in their import penetration, thus neutralizing their contribution to the overall sector result.

10.3 CANADA'S SHARE OF OECD IMPORTS, 1967 TO 1977

In 1977, the OECD imported $55.2 billion U.S. of chemicals and chemical products, of which $1.7 billion U.S. or 3.1 percent was supplied by Canada (Table 10.6).

Throughout the period the two major suppliers were West Germany and the United States. West Germany's share deviated only slightly from the 1967 value of 19.8 percent ending the period at its lowest level of 19.1 percent. The greatest change was the decline of the U.S. as a supplier. Its market share decreased from 19.4 percent at the beginning of the period to 14.3 percent, an average annual decline of 3.0 percent.

Canada's share of the OECD import market declined from 1967 to 1974, decreasing from 4.2 percent to 2.5 percent. This decrease was wide based, taking place in all of the major OECD countries. The recovery of Canada's share, which began in 1975 and was extended through 1977, was due largely to an increased share of the U.S. market. In 1977, 78 percent of Canada's OECD exports of chemicals and chemical products was destined to the U.S. (Table 10.7). In the past three years, the U.S. market has grown more quickly than the OECD as a whole thereby increasing Canada's overall share (Table 10.8).

Manufactured fertilizers, which includes potash, represent the largest portion of Canada's exports of chemicals and chemical products (Table 10.10). Canada's exports of these commodities to the OECD increased at about the same rate as their OECD total imports. Of the next three largest exports of Canada two declined as a portion of OECD exports, organic chemicals and inorganic chemicals, while radioactive and associated materials more than tripled its OECD market share.

TABLE 10.6

CHEMICALS AND CHEMICAL PRODUCTS: OECD IMPORTS BY SOURCE[1]

DISTRIBUTION AND AVERAGE ANNUAL RATE OF CHANGE

	DISTRIBUTION percent											Percent Change
	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1967-1977
Total Imports	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	
Developed Market Economies												
West Germany	19.8	20.1	20.3	19.9	20.2	20.6	21.1	20.3	19.2	19.4	19.1	- 0.4
United States	19.4	19.5	18.1	18.4	16.5	15.2	14.7	13.9	14.0	14.9	14.3	- 3.0
Netherlands	7.5	8.4	8.7	8.8	9.2	9.8	10.4	11.7	10.7	10.9	10.4	3.3
France	8.5	8.2	8.4	8.2	8.4	8.8	9.4	9.4	9.6	9.5	9.5	1.1
United Kingdom	9.2	8.8	8.7	8.5	8.7	8.5	8.2	8.1	8.4	8.5	8.7	- 0.6
Belgium-Luxembourg	4.4	5.1	5.6	5.9	6.0	6.6	7.2	7.2	7.5	7.4	7.5	5.5
Switzerland	5.4	5.4	5.5	5.3	5.5	5.5	5.2	4.4	4.9	4.8	4.7	- 1.4
Italy	4.4	4.2	4.1	3.9	4.2	4.3	4.2	4.6	4.4	4.3	4.3	- 0.2
Canada	4.2	3.8	3.5	3.5	3.4	3.1	2.8	2.5	2.7	3.2	3.1	- 3.0
Japan	2.0	2.0	2.3	3.0	3.1	3.1	2.6	3.0	2.7	2.4	2.4	1.8
Total EEC (9)	55.1	56.2	57.5	56.6	58.1	60.0	61.9	62.6	61.3	61.6	61.2	1.1
Other Developed Market Economies	6.7	6.4	6.7	6.6	6.6	6.8	6.7	6.9	7.7	6.8	7.3	0.9
OPEC	0.4	0.4	0.3	0.3	0.3	0.3	0.3	0.4	0.4	0.3	0.2	- 6.7
Other Developing Market Economies	3.8	3.5	3.3	3.6	3.6	3.3	3.1	3.3	3.3	3.0	3.3	- 1.4
Centrally Planned Economies	3.0	2.8	2.7	2.7	2.8	2.6	2.7	3.0	3.1	3.0	3.5	1.6
ADDENDUM												
Total Imports in Millions of U.S. Dollars	10,250	11,802	15,330	16,167	17,755	21,294	29,465	44,758	40,877	48,858	55,271	

TABLE 10.7

CHEMICALS AND CHEMICAL PRODUCTS: PERCENTAGE OF CANADA'S

EXPORTS BY DESTINATION[2]

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	OECD Share 1977
O.E.C.D.	87.2	86.2	86.8	85.8	85.3	86.3	87.2	87.4	87.2	88.0	90.6	100.0
United States	55.5	59.2	59.1	53.5	58.8	58.9	58.9	62.0	65.3	67.5	70.8	78.1
Japan	2.1	1.7	1.8	2.2	1.9	2.0	2.7	2.4	1.1	1.6	2.3	2.5
E.E.C. (9)	23.0	20.6	20.5	24.5	20.3	20.1	20.3	17.7	17.1	15.5	13.3	14.7
United Kingdom	14.3	13.6	13.0	17.8	14.5	14.2	13.8	11.4	9.3	8.9	6.3	7.0
Rest of World	12.8	13.8	13.2	14.2	14.7	13.7	12.8	12.6	12.8	12.0	9.4	

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1 For source and notes see Table 2.6.

2 For source and notes see Table 2.7.

TABLE 10.8

CHEMICALS AND CHEMICAL PRODUCTS: GROWTH OF FOREIGN IMPORTS[1]
(percent)

	OECD	U.S.A.	JAPAN	EEC (9)*	OTHER OECD	DEVELOPING COUNTRIES**
1967	-	-	-	-	-	-
1968	15.1	17.3	13.4	11.2	16.2	13.3
1969	17.2	9.8	12.1	16.4	19.0	5.3
1970	16.9	17.7	26.1	20.8	14.9	11.7
1971	9.8	11.9	- 0.2	5.6	11.8	7.0
1972	19.9	23.8	14.4	11.5	22.2	19.4
1973	38.4	22.5	61.9	31.8	40.4	38.0
1974	51.9	61.2	42.0	45.6	53.2	68.1
1975	-8.7	-7.5	-23.1	-3.6	- 8.7	2.3
1976	19.5	30.4	29.1	16.3	18.1	..
1977	13.1	13.7	12.9	16.9	12.2	17.2

TABLE 10.9

CHEMICALS AND CHEMICAL PRODUCTS: CANADA'S TRADE SHARE BY MARKET[1]
(percent)

1967	4.2	29.0	3.5	4.7	0.4	1.2
1968	3.8	26.6	3.4	4.0	0.4	1.2
1969	3.6	26.3	3.3	3.9	0.3	1.2
1970	3.5	25.9	3.1	3.9	0.3	1.4
1971	3.4	25.7	3.5	3.5	0.3	1.6
1972	3.1	22.7	3.0	3.3	0.2	1.4
1973	2.8	23.3	2.2	3.0	0.2	1.1
1974	2.5	19.7	2.8	2.4	0.2	0.9
1975	2.7	22.1	2.9	2.0	0.2	0.8
1976	3.2	25.2	2.2	2.3	0.2	1.1
1977	3.1	25.0	2.5	1.8	0.2	1.0

[1] For source and notes see Table 2.8.

TABLE 10.10

CHEMICALS AND CHEMICAL PRODUCTS:

COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE OECD[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
			Total OECD Imports		Imports from Canada	
	Total OECD Imports	Imports from Canada	1967	1977	1967	1977
TOTAL, CHEMICALS AND CHEMICAL PRODUCTS	18.4	14.8	100.0	100.0	100.0	100.0
Synthetic rubber	13.6	6.8	3.5	2.3	11.0	5.4
Animal and vegetable oils	16.7	8.4	1.1	1.0	0.1	0.1
Organic chemicals	19.5	13.6	22.1	24.4	16.6	14.9
Inorganic chemicals (gases, elements, oxides, halogens)	17.9	18.3	7.6	7.3	12.9	17.3
Other inorganic chemicals	14.7	11.5	4.5	3.3	5.5	4.1
Radioactive and associated materials	37.0	43.4	1.0	4.2	1.2	10.9
Synthetic organic dyestuffs	16.0	43.6	3.3	2.7	..	0.1
Dyeing and tanning extracts	11.1	-18.6	0.4	0.2	0.2	..
Pigments, paints, varnishes, etc.	17.2	1.0	3.2	2.9	1.4	0.4
Medicinal and pharmaceutical products	18.1	12.0	10.1	9.9	1.6	1.3
Essential oils, perfume, etc.	12.9	9.7	2.4	1.5	0.2	0.1
Perfume and cosmetics, etc.	20.9	5.6	1.3	1.6	0.3	0.1
Soaps, cleansing and polishing preparations	17.1	15.3	2.1	1.9	0.6	0.6
Manufactured fertilizers	14.9	14.7	6.9	5.1	34.0	33.6
Explosives and pyrotechnic products	11.4	-10.5	0.9	0.5	7.8	0.6
Plastic materials	20.3	21.6	17.4	20.5	3.9	6.9
Chemical materials and products, n.e.s.	16.7	17.8	11.9	10.3	2.8	3.[illegible]
Chemicals - photographic use	22.2	n.a.	0.3	0.4	-	[illegible]

TABLE 10.11

CHEMICALS AND CHEMICAL PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE OECD[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, CHEMICALS AND CHEMICAL PRODUCTS	4.2	3.8	3.6	3.5	3.4	3.1	2.8	2.5	2.7	3.2	3.1
Synthetic rubber	13.2	12.4	10.1	9.8	10.0	7.9	7.1	6.5	5.7	6.6	7.2
Animal and vegetable oils	0.5	0.3	0.2	0.3	0.3	0.1	0.2	0.1	0.1	0.1	0.3
Organic chemicals	3.1	2.6	2.3	1.9	1.7	1.3	1.2	1.1	1.1	1.4	1.9
Inorganic chemicals (gases, elements, oxides, halogens)	7.1	6.7	7.4	8.3	8.1	8.0	7.4	6.2	4.7	7.6	7.3
Other inorganic chemicals	5.1	5.5	5.3	5.0	4.2	4.0	3.8	3.2	3.5	3.5	3.8
Radioactive and associated materials	5.0	4.0	11.8	6.7	12.2	13.5	15.7	11.0	10.7	16.2	7.9
Synthetic organic dyestuffs	..	0.1	0.2	0.1	0.1	0.1	0.2	0.2	0.2	0.1	0.2
Dyeing and tanning extracts	2.0	0.9	1.1	1.1	0.8	1.2	0.9	1.0	0.9	0.3	0.1
Pigments, paints, varnishes, etc.	1.8	2.1	1.5	1.5	1.5	0.9	0.4	0.4	0.5	0.5	0.4
Medicinal and pharmaceutical products	0.7	0.7	0.8	0.6	0.6	0.6	0.6	0.5	0.5	0.5	0.4
Essential oils, perfume, etc.	0.4	0.3	0.3	0.4	0.5	0.5	0.4	0.3	0.2	0.2	0.3
Perfume and cosmetics, etc.	1.0	0.6	0.5	0.5	0.7	0.6	0.3	1.0	0.5	0.2	0.3
Soaps, cleansing and polishing preparations	1.1	1.0	1.1	0.8	0.7	0.6	0.7	0.6	0.8	0.9	1.0
Manufactured fertilizers	20.6	20.5	20.7	25.6	24.4	21.5	18.7	19.8	19.6	21.2	20.2
Explosives and pyrotechnic products	34.6	27.1	21.6	16.1	11.6	6.1	5.9	4.3	3.9	2.8	3.9
Plastic materials	0.9	1.1	1.3	1.2	1.2	1.1	1.1	0.8	0.9	0.9	1.0
Chemical materials and products, n.e.s.	1.0	0.8	0.8	1.0	1.0	0.9	0.8	0.8	1.1	1.2	1.1
Chemicals - photographic use	-	..	0.1	0.1	0.1	0.1	0.1	0.1	0.4	0.3	0.1

[1] For source and notes see Table 2.8.

TABLE 10.12

CHEMICALS AND CHEMICAL PRODUCTS:

COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE USA[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
	Total U.S.A. Imports	Imports from Canada	Total U.S.A. Imports 1967	Total U.S.A. Imports 1977	Imports from Canada 1967	Imports from Canada 1977
TOTAL, CHEMICALS AND CHEMICAL PRODUCTS	19.0	17.2	100.0	100.0	100.0	100.0
Synthetic rubber	21.0	16.3	2.1	2.5	6.0	5.5
Animal and vegetable oils	4.3	14.4	1.0	0.3	0.1	..
Organic chemicals	21.4	18.0	22.2	27.2	13.2	14.0
Inorganic chemicals (gases, elements, oxides, halogens)	19.8	18.4	17.0	18.2	14.8	16.4
Other inorganic chemicals	12.5	12.2	5.0	2.8	6.5	4.2
Radioactive and associated materials	40.7	47.1	1.6	8.7	1.4	13.0
Synthetic organic dyestuffs	15.4	48.8	3.7	2.8	..	0.1
Dyeing and tanning extracts	2.8	-35.0	1.0	0.2	0.3	..
Pigments, paints, varnishes, etc.	22.6	21.0	0.6	0.8	0.2	0.3
Medicinal and pharmaceutical products	16.1	11.1	7.3	5.7	0.7	0.4
Essential oils, perfume, etc.	9.9	4.2	5.0	2.3	0.3	0.1
Perfume and cosmetics, etc.	14.5	19.8	1.3	0.9	0.1	0.1
Soaps, cleansing and polishing preparations	22.0	15.3	0.7	0.9	0.7	0.6
Manufactured fertilizers	17.5	16.2	14.5	12.7	40.5	37.0
Explosives and pyrotechnic products	- 1.5	-11.0	4.2	0.6	11.6	0.7
Plastic materials	20.9	28.4	6.1	7.2	1.8	4.5
Chemical materials and products, n.e.s.	18.2	22.8	6.8	6.4	2.0	3.1
Chemicals - photographic use	-	-	-	-	-	-

TABLE 10.13

CHEMICALS AND CHEMICAL PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE USA[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, CHEMICALS AND CHEMICAL PRODUCTS	29.0	26.6	26.3	25.9	25.7	22.7	23.3	19.7	22.1	25.2	25.0
Synthetic rubber	82.9	72.2	68.9	59.6	58.0	59.7	51.3	57.0	57.9	62.4	55.6
Animal and vegetable oils	1.5	1.6	1.4	2.2	1.4	1.1	3.7	3.0	1.7	2.2	3.8
Organic chemicals	17.3	15.1	13.2	10.9	9.7	7.6	8.3	7.5	7.4	9.9	12.9
Inorganic chemicals (gases, elements, oxides, halogens)	25.4	24.8	25.2	23.8	25.6	22.9	23.7	21.2	18.0	22.8	22.6
Other norganic chemicals	38.3	39.4	42.3	40.7	36.0	33.3	34.6	30.5	38.5	37.7	37.3
Radioactive and associated materials	24.1	26.7	45.2	36.4	43.6	48.0	53.2	46.5	39.5	40.6	37.7
Synthetic organic dyestuffs	0.1	0.7	1.3	0.4	0.3	0.7	1.3	1.1	1.9	1.2	1.2
Dyeing and tanning extracts	9.0	4.5	6.8	7.4	5.0	5.4	6.0	7.8	8.5	3.0	0.1
Pigments, paints, varnishes, etc.	9.5	21.3	15.8	9.3	11.2	9.1	9.3	7.9	7.7	9.1	8.3
Medicinal and pharmaceutical products	2.9	2.6	3.0	2.5	2.4	1.6	2.4	2.0	1.8	2.3	1.9
Essential oils, perfume, etc.	1.5	1.2	1.1	1.4	1.3	1.0	1.2	1.0	1.0	0.6	0.9
Perfume and cosmetics, etc.	1.6	1.5	1.3	2.6	4.1	2.4	1.8	2.3	2.9	2.3	2.4
Soaps, cleansing and polishing preparations	27.6	26.0	28.6	20.4	15.0	14.5	18.0	14.0	16.0	14.1	15.8
Manufactured fertilizers	81.3	86.4	87.6	87.1	89.2	84.6	78.7	62.6	68.4	76.4	72.7
Explosives and pyrotechnic products	80.6	70.3	65.5	55.3	50.8	34.0	34.5	37.5	32.0	18.8	29.3
Plastic materials	8.5	9.2	9.2	9.2	10.3	9.7	12.5	9.3	12.8	13.1	15.6
Chemical materials and products, n.e.s.	8.3	7.2	8.8	11.5	10.9	8.4	8.6	8.4	11.7	11.5	12.2
Chemicals - photographic use	-	-	-	-	-	-	-	-	-	-	-

[1] For source and notes see Table 2.8.

TABLE 10.14

CHEMICALS AND CHEMICAL PRODUCTS:

COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE E.E.C.[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
	Total E.E.C. Imports	Imports from Canada	Total E.E.C. Imports 1967	Total E.E.C. Imports 1977	Imports from Canada 1967	Imports from Canada 1977
TOTAL, CHEMICALS AND CHEMICAL PRODUCTS	16.6	6.1	100.0	100.0	100.0	100.0
Synthetic rubber	6.9	- 7.5	4.7	2.0	22.9	5.9
Animal and vegetable oils	11.7	8.6	1.5	1.0	0.4	0.5
Organic chemicals	14.6	2.2	28.6	24.1	29.7	20.5
Inorganic chemicals (gases, elements, oxides, halogens)	18.0	17.8	6.3	7.1	10.8	30.9
Other inorganic chemicals	14.5	9.1	4.0	3.4	2.7	3.7
Radioactive and associated materials	36.0	13.2	2.3	10.6	0.6	1.1
Synthetic organic dyestuffs	15.8	33.8	3.2	3.0	..	0.3
Dyeing and tanning extracts	10.4	11.6	0.6	0.3	..	..
Pigments, paints, varnishes, etc.	15.1	-10.6	2.1	1.9	5.2	1.0
Medicinal and pharmaceutical products	18.5	17.1	10.3	12.2	2.3	6.1
Essential oils, perfume, etc.	13.9	14.4	3.2	2.6	0.2	0.4
Perfume and cosmetics, etc.	24.4	14.4	0.4	0.7	0.2	0.5
Soaps, cleansing and polishing preparations	15.4	14.1	1.2	1.1	0.3	0.6
Manufactured fertilizers	18.0	- 7.2	5.1	5.8	13.5	3.6
Explosives and pyrotechnic products	17.4	21.9	0.4	0.5	0.1	0.2
Plastic materials	17.0	16.7	13.3	13.9	6.4	16.8
Chemical materials and products, n.e.s.	13.5	12.0	12.4	9.6	4.6	8.[illegible]
Chemicals - photographic use	25.8	n.a.	0.3	0.6	-	0.[illegible]

TABLE 10.15

CHEMICALS AND CHEMICAL PRODUCTS:

CANADA'S SHARE OF IMPORTS BY THE E.E.C. (EXCLUDING INTRA-TRADE)[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, CHEMICALS AND CHEMICAL PRODUCTS	4.7	4.0	3.9	3.9	3.5	3.3	3.0	2.4	2.0	2.3	1.8
Synthetic rubber	22.5	22.3	16.2	14.3	13.0	9.0	11.7	9.1	5.8	5.9	5.3
Animal and vegetable oils	1.2	0.4	0.3	0.4	0.8	0.3	0.2	0.1	0.1	0.2	0.9
Organic chemicals	4.8	3.3	3.1	2.9	2.3	1.7	1.5	1.2	1.1	1.2	1.5
Inorganic chemicals (gases, elements, oxides, halogens)	8.1	6.6	8.9	13.8	13.6	15.3	11.6	9.3	3.3	12.5	7.9
Other inorganic chemicals	3.2	3.2	4.1	3.8	2.5	2.9	3.4	3.2	3.2	2.1	2.0
Radioactive and associated materials	1.2	1.3	0.8	0.8	0.5	0.5	0.5	0.6	6.2	0.7	0.2
Synthetic organic dyestuffs	0.1	0.1	0.1	0.1	0.1	0.1	0.3	0.3	0.2	0.2	0.2
Dyeing and tanning extracts	..	..	..	..	0.1	1.6	1.1	0.7	0.6	0.2	..
Pigments, paints, varnishes, etc.	11.5	11.6	9.0	9.8	9.0	4.7	1.5	1.2	1.2	1.0	0.9
Medicinal and pharmaceutical products	1.0	1.4	1.7	1.5	1.3	1.6	1.6	1.3	1.1	1.1	0.9
Essential oils, perfume, etc.	0.3	0.3	0.3	0.4	1.0	0.9	0.5	0.3	0.1	0.2	0.3
Perfume and cosmetics, etc.	2.8	3.3	3.7	2.4	4.5	5.5	1.0	0.8	0.6	0.9	1.2
Soaps, cleansing and polishing preparations	1.1	0.9	0.6	0.9	1.5	0.8	0.6	1.0	1.2	1.3	1.0
Manufactured fertilizers	12.3	12.5	8.4	3.5	2.3	2.9	4.8	3.6	0.8	1.8	1.1
Explosives and pyrotechnic products	0.6	2.1	2.4	0.4	1.0	0.7	0.4	0.4	1.8	1.3	0.9
Plastic materials	2.3	2.7	4.7	3.0	3.5	3.6	3.5	3.0	3.0	2.1	2.2
Chemical materials and products, n.e.s.	1.7	1.2	1.5	1.7	1.7	1.5	1.4	1.2	1.7	2.3	1.5
Chemicals - photographic use	-	0.2	0.7	0.3	1.0	0.5	0.4	0.5	0.4	0.2	0.3

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[1] For source and notes see Table 2.8.

CHAPTER XI

TRADE IN OTHER INDUSTRIAL PRODUCTS

CHAPTER XI
TRADE IN OTHER INDUSTRIAL PRODUCTS

11.1 INTRODUCTION

The industry groups dealt with in this chapter include:

Tobacco Product Industries
Rubber and Plastics
Leather Products
Textile Products
Knitting Mills
Clothing
Furniture and Fixtures
Non-Metallic Mineral Products
Petroleum and Coal Products
Miscellaneous Manufacturing Industries

They are treated collectively because in total they accounted for only 6 percent of overall manufacturing exports in 1978 (although close to 19 percent of total imports - see Table 11.1). This heterogeneous group represents all residual industries not included in chapter II to X. Table 11.1 summarizes several selected indicators as in the other chapters, to show the importance of this collection of industries to Canadian manufacturing.

The data indicates that the industries contained in this group have substantially higher shares of output, employment and profits than they do of exports. Secondly, the export share is significantly smaller than the matching import share. The general impression is that the group contains many industries with a small propensity to export (see Table 1.4). This is also reflected in the data for these groups taken collectively as shown in Table 11.2 below. However, the rates of growth for exports in the 1967 to 1978 period outperformed imports by more than 2 percentage points, and both trade rates are generally higher than for the other indicators.

In a number of the import sectors - leather, textiles, knitting mills and clothing - the factors influencing Canada's trade performance are similar. The primary factor is the development of these industries in the developing market economies. These have pushed expansion to achieve growth in their economies and for balance of payments reasons the state-trading countries have expanded to improve their foreign exchange positions. Such countries look to these kinds of industries as the first step on the way to industrialization, despite the world oversupply situation, and as a result new exporters appear regularly offering products produced at wages far below developed country levels.

TABLE 11.1

OTHER MANUFACTURING INDUSTRIES

SELECTED INDICATORS

	1967	1978	Average Annual Rate of Growth 1967-1978	1978 Share of Total Manufacturing Activity
			(percent)	
REAL DOMESTIC PRODUCT (Constant $, millions)	4,588.5	7,262.4	4.3	28.7
SHIPMENTS ($ millions)	10,015	34,738	12.0	26.6
DOMESTIC EXPORTS ($ millions)	467	2,337	15.8	6.0
IMPORTS LESS RE-EXPORTS ($ millions)	1,917	7,778	13.6	18.9
EMPLOYMENT (000's)	470	488	0.3	30.6
PROFITS ($ millions)	1,022	3,776	12.6	28.9
INVESTMENT ($ millions)	709.8	1,675.7	8.1	17.4

Source: See Table 2.1

In response, virtually all countries with similar industries operate systems of restraint on imports. The signing of the GATT Multifibre Agreement in 1973 led initially to increased imports by the EEC and after 1975 by the United States and Canada.

The non-metallic mineral products industry is highly cyclical both on a seasonal and yearly basis because of its role as a supplier to the construction industry. Many of the products such as lime and cement are relatively high volume - low value commodities which are not condusive to transportation over long distances. Market proximity is therefore an important factor as well as the level of activity of the construction industry.

The trade performances of the rubber and plastics industries have been greatly influenced by the trade of the automotive industry. This relationship is closest in the rubber products sector which includes tire and tube manufacturers.

The household furniture portion of the furniture and fixtures sector has developed, as in most producing countries, on the basis of successfully serving regional domestic markets. In the Canadian industry this sector is characterized by relatively small-scale operations. Furniture plants in the U.S. employ an average of twice as many workers as do Canadian plants and simultaneously have a considerably higher level of productivity. Office furniture firms in Canada tend to be more specialized and most are divisons of multinational enterprises which have the necessary financial, technological, marketing and management expertise to achieve greater economies of scale. These firms have a much better trade performance than the household sector.

11.2 TRADE DEVELOPMENTS, 1967 TO 1978

The group's trade performance has not changed drastically over the period. The growth of exports, from $467 million in 1967 to $2.3 billion, was insufficient to consistently reduce the normalized trade deficit. This improved from 62.1 percent in 1968 to 53.5 percent in 1973 but rose and fell again before 1978. At the same time, the ratio of shipments to the Canadian market remained only slightly changed throughout the period. The export orientation of the entire group increased only slightly, from 4.6 to 6.7 percent, and the increase was matched by increased import penetration from 16.6 to 19.4 percent.

At the major group level, export orientation exceeded 10 percent only in rubber and plastics, non-metallic mineral products and in miscellaneous manufacturing. In contrast, import penetration exceeded 10 percent in six of these major groups, and in five it was in the range of 23 to 55 percent.

According to the ratio of shipments to the Canadian market (implicit self-sufficiency) one could separate the major groups into those that experienced a near balance in trade, e.g. tobacco, clothing, furniture and fixtures, non-metallic mineral products and petroleum and coal products. The remaining sectors, i.e. rubber and plastics, leather, textiles, knitting, printing and publishing and miscellaneous manufacturing have a much stronger tendency to import. In this regard the miscellaneous manufacturing industries are the best example. For this group exports increased at 9.3 percent per annum, imports at 14.5 percent per annum and the normalized deficit rose from about 50 percent in 1967 to about 63 percent in 1978. At the same time, export orientation decreased, from 22.4 to 19.6 percent and import penetration rose from 46.2 to 51.7 percent in the same period.

The detailed trade measures for each industry are provided at the end of the chapter.

TABLE 11.2

OTHER INDUSTRY GROUPS: TRADE MEASURES, 1977 TO 1978

YEAR	DOMESTIC EXPORTS	ADJUSTED IMPORTS[1]	TRADE BALANCE	TRADE TURNOVER (EXPORTS + IMPORTS)	CANADIAN FACTORY SHIPMENTS	CANADIAN MARKET[2]	TRADE BALANCE / TRADE TURNOVER	SHIPMENTS / CANADIAN MARKET	EXPORT ORIENTATION	IMPORT PENETRATION
	(MILLIONS OF DOLLARS)						(PERCENT)			
1967	467	1,917	-1,450	2,384	10,115	11,565	-60.8	87.5	4.6	16.6
1968	500	2,138	-1,638	2,638	10,779	12,417	-62.1	86.8	4.6	17.2
1969	615	2,470	-1,855	3,085	11,578	13,433	-60.1	86.2	5.3	18.4
1970	719	2,496	-1,777	3,215	11,757	13,534	-55.3	86.9	6.1	18.4
1971	726	2,733	-2,007	3,459	12,959	14,966	-58.0	86.6	5.6	18.3
1972	894	3,271	-2,377	4,165	14,580	16,957	-57.1	86.0	6.1	19.3
1973	1,181	3,894	-2,713	5,075	16,984	19,697	-53.5	86.2	7.0	19.8
1974	1,441	5,067	-3,626	6,508	21,417	25,043	-55.7	85.5	6.7	20.2
1975	1,372	5,214	-3,842	6,586	23,503	27,345	-58.3	85.9	5.8	19.1
1976	1,463	5,891	-4,428	7,354	26,396	30,824	-60.2	85.6	5.5	19.1
1977	1,624	6,578	-4,954	8,202	29,461	34,415	-60.4	85.6	5.5	19.1
1978	2,337	7,778	-5,441	10,115	34,738	40,179	-53.8	86.5	6.7	19.4

[1]Total imports less re-exports; [2]Shipments plus imports less exports.

11.3 CANADA's SHARE OF OECD IMPORTS, 1967 TO 1977

11.3.1 Tobacco Products

With total OECD imports of $875 million U.S. in 1977 the tobacco products sector represents the smallest major import sector. Canada's share was $3 million U.S. or 0.3 percent. With a market share of 30.7 percent in 1977 the Netherlands strengthened its position as the leading supplier, a position it has maintained throughout the period. Growing strongly at an average annual rate of 3.3 percent, West Germany supplanted Belgium-Luxembourg as the second ranking supplier. Major declines were suffered by the United States, the United Kingdom and Switzerland all of which declined at the average annual rate of 4.1 percent (Table 11.7).

Canada's market share increased from 0.2 to 0.3 percent. A major restructuring took place after the United Kingdom joined the EEC. The United Kingdom's share of Canada's OECD exports declined from 81.2 percent in 1967 to 2.1 percent in 1977. The United States which began the period with 11.7 percent of these exports purchased 92.8 percent in 1977. During this period Canada's exports to the rest of the world increased by almost threefold (Table 11.8).

11.3.2 Rubber and Plastics Products

The OECD imports of rubber and plastics products amounted to almost $10 billion U.S. in 1977, of which Canada supplied $274 million or 2.8 percent (Table 11.21). The leading suppliers accounting for over 40 percent were West Germany, France and Italy. Throughout the period West Germany's share varied, however, its average annual growth was only 0.3 percent. France and Italy both grew significantly faster, while the United States and the United Kingdom lost significant portions of their shares. The fastest growing suppliers were Taiwan and Spain.

Canada's share increased from 2.4 percent in 1967 to 2.8 percent in 1977 reaching its peak in 1976 at 3.3 percent. The U.S. was Canada's leading market purchasing 86.2 percent of its total exports and 92.3 percent of its OECD exports. This is a significant change from 1967 and reflects the decline of both the EEC and the rest of the world markets (Table 11.24). Canada's exports are almost completely concentrated in two commodities - articles of rubber and articles of plastic. These are two of the fastest growing markets within the total OECD rubber and plastics import market (Table 11.25).

11.3.3 Leather Products

Canada is only a minor supplier of leather products to the OECD. In 1977 Canada's share of the OECD import market of $9.4 billion U.S. was 0.6 percent (Table 11.35). The dominant supplier was Italy. After dropping to a low of 23.7 percent in 1973, Italy's share increased to 27.2 percent, slightly higher than 1967. Except for France and the Other Developed Market Economies all of the industrialized countries suffered reduced shares. Led by South Korea, Taiwan and Brazil the Other Developing Market Economies enjoyed an increase in their share from 14.1 percent in 1967 to 31.5 percent in 1977.

Canada's share decreased by forty percent. Over the period Canada's trade became more dependent on the U.S. market as its share of exports destined to the other major markets, particularly the United Kingdom, declined (Table 11.36). The only commodity market in which Canada's share increased was in the fast growing market for leather clothing.

11.3.4 Textiles

In the large OECD import market for textile products, amounting to more than $27 billion U.S. in 1977, Canada played a very minor role supplying only $115 million U.S. or 0.4 percent (Table 11.49). Following West Germany as the leading supplier were France, Italy and Belgium-Luxembourg. Except for Belgium-Luxembourg all of these countries enjoyed an increase in their shares. While the EEC dominates the market, both the Other Developed Market Economies and the Other Developing Market Economies have a significant share.

Canada's market share declined by a third. This decline occurred in the OECD markets other than the United States and Japan. The importance of the EEC market in Canadian exports declined from a share of 29.3 percent in 1967 to 17.0 percent in 1977 (Table 11.50). Canada's share of the relatively fast growing U.S. market and its small share of the Japanese market were maintained. Of the major commodities imported by the OECD in only one - textile fabrics, were imports from Canada growing faster than world imports (Table 11.53).

11.3.5 Knitting Mill Products

As was the case with all of the fabric and clothing oriented commodities Canada played only a very minor role in the OECD import markets. OECD imports amounted to $7.3 billion U.S. in 1977, of which Canada supplied only $6 million U.S. or 0.1 percent (Table 11.63). With the exception of Italy and Hong Kong, the period saw a major shuffling of the ranking of major suppliers. In general the industrialized countries suffered significant losses of market share while the Developing Market Economies increased their shares. These increases were led by Taiwan and South Korea.

Canada's market share decreased by 75 percent. This decline was wide-based in that it took place in all of Canada's OECD markets (Table 11.66). The OECD's imports of knitted commodities grew at the average annual rate of 20.8 percent while its imports from Canada grew at only 6.0 percent (Tble 11.67).

11.3.6 Clothing

The OECD imports of clothing commodities amounted to $11.5 billion U.S. in 1977, of which Canada supplied $64 million U.S. or 0.6 percent (Table 11.77). This is the only sector of the twenty major import sectors in which a developing market economy is the leading supplier. Throughout the period Hong Kong was the first ranked supplier and another developing country - South Korea, ranked third. The leading industrialized supplier was West Germany which ranked second. The Centrally Planned Economies made a significant gain over the period more than doubling their market share.

Canada's share decreased by almost 50 percent. The decline took place in all of Canada's major OECD markets except Japan where a small increase was recorded. Japan and the United States became more important markets as the EEC declined (Table 3.60). The growth in imports of the major commodities from Canada was significantly less than the OECD total imports of those commodities (Table 11.81).

11.3.7 Furniture and Fixtures

Furniture products represent the third smallest of the OECD import sectors. In 1977 imports amounted to $5 billion U.S., of which Canada supplied $250 million U.S. or 5.0 percent (Table 11.91). The EEC as a whole dominated the market with 63.8 percent. The largest supplier was West Germany which ended the period with a 22.9 percent share, only slightly higher than its 22.4 percent in 1967. Throughout the eleven year period Italy's share increased at an average annual rate of 5.0 percent while Belgium-Luxembourg's share decreased at a rate of 3.8 percent. As a result Italy became the second largest supplier.

Canada's share increased until 1971 when it reached 10.2 percent, thereafter it declined each year. Canada's changing share reflects its position in the U.S. market since this market accounted for 95.4 percent of its OECD exports in 1977 (Table 11.92). Canada's share of the U.S. market peaked at 52.2 percent in 1971 and has since declined to 36.8 percent (Table 11.94). During the years 1972-75 the U.S. market was growing at a much slower rate than the OECD market. This combined with Canada's decreasing share of the U.S. market, led to a rapid decline of its overall market share.

11.3.8 Printing, Publishing and Allied Products

In 1977, the OECD imports of printing and publishing products amounted to $3.9 billion U.S., the second smallest import sector. Canada supplied $78 million U.S. or 2.0 percent of the total imports (Table 11.105). The three leading suppliers accounted for almost 50 percent with the U.S. alone representing 19.8 percent. The U.S. share was down considerably from its 1967 value of 27.1 percent demonstrating an average annual decrease in its share of 3.1 percent. West Germany maintained its second ranking position and increased its share considerably.

Canada increased its market share at the rate of 3.6 percent per year. The increase was the result of its almost doubling of its market share in the U.S., while it more or less maintained its other OECD market shares (Table 11.108). In 1977 the U.S. market purchased 89 percent of Canada's OECD exports of printed matter (Table 11.106).

11.3.9 Non-Metallic Mineral Products

The OECD imports of this very heterogeneous group of commodities amounted $9.2 billion U.S. in 1977, of which Canada supplied $249 million U.S. or 2.7 percent (Table 11.119). The three leading suppliers, accounting for 43 percent, were West Germany, Italy and France. All three of these countries increased their market shares over the period. The EEC as a group had a market share of 65.2 percent in 1977 a slight increase from its 1967 value of 63.7 percent.

Canada's market share increased from 1967 to 1971 when it peaked at 3.2 percent. This level was maintained for three years after which it declined and subsequently increased to its 1977 value. Almost 90 percent of Canada's exports are to the U.S. market and Canada's total OECD share reflects this relationship. Canada almost doubled its U.S. market share while making significant increases in all of the other OECD markets except Japan (Table 11.122). Glass and lime, cement, etc. represented 78 percent of Canada's 1977 exports. The OECD imports from Canada of these commodities grew much more quickly than their total imports (Table 11.123).

11.3.10 Petroleum and Coal Products

The OECD imports of petroleum and coal products reflect the massive energy price increases in effect since 1973. By 1977, the value of these imports reached almost $31 billion U.S., of which Canada supplied $391 million or 1.3 percent (Table 11.133). The Netherlands replaced Venezuela as the first ranking supplier since the Netherlands market share grew at the average annual rate of 3.5 percent and Venezuela's declined at 4.3 percent. The EEC remained the main supplier block of nations followed by the OPEC countries. The Other Developing Market Economies and the Centrally Planned Economies made significant gains.

Canada's share increased by more than fourfold. Its share increased dramatically in the 1972-75 period and declined in the two following years. The U.S. remained the largest Canadian market, however, the EEC purchased a significant share from 1974-76 (Table 11.134). The increases in Canada's share up to 1975 took place in all of the major markets just as the decline since that time was widespread (Table 11.136). In terms of the specific commodities, petroleum product imports from Canada have increased much more rapidly than the total imports of these commodities. Coke and semi-coke, while of lesser importance, have also grown rapidly (Table 11.137).

11.3.11 Miscellaneous Manufacturing Products

The OECD imports of this large group of unrelated products amounted to almost $40 billion U.S. in 1977, of which Canada supplied only $290 million U.S. or 0.7 percent (Table 11.147). While many countries supplied significant portions, the United States, West Germany and the United Kingdom were the largest suppliers. All three of these countries had declining shares over the period.

Canada's market share increased until 1970-71, when it peaked at 1.3 percent, thereafter it declined. This pattern was set by Canada's dependence on the U.S. and EEC markets (Table 11.198). In both of these markets Canada's share peaked in the 1970-71 period and declined, although in the case of the U.S. share the 1977 value was higher than the initial value (Table 11.150).

The commodities in which Canada's trade is concentrated are average or above average import growth sectors. In two groups of commodities - professional and scientific instruments; sporting goods, excluding firearms - imports from Canada grew more slowly than total imports. In the case of electrical measuring and controlling instruments and particularly photographic films, imports from Canada grew more quickly (Table 11.151).

TABLE 11.3

TOBACCO PRODUCTS INDUSTRIES: TRADE MEASURES, 1967 TO 1978

YEAR	DOMESTIC EXPORTS	ADJUSTED IMPORTS[1]	TRADE BALANCE	TRADE TURNOVER (EXPORTS +IMPORTS)	CANADIAN FACTORY SHIPMENTS	CANADIAN MARKET[2]	TRADE BALANCE / TRADE TURNOVER	SHIPMENTS / CANADIAN MARKET	EXPORT ORIENTATION	IMPORT PENETRATION
	(MILLION OF DOLLARS)						(PERCENT)			
1967	3	5	-2	8	493	495	-27.6	99.6	0.6	1.0
1968	3	5	-2	8	509	511	-20.7	99.7	0.6	1.0
1969	4	6	-2	10	488	490	-16.8	99.7	0.8	1.1
1970	3	5	-2	9	527	529	-22.3	99.6	0.6	1.0
1971	3	7	-4	10	575	579	-42.4	99.3	0.5	1.2
1972	4	7	-3	11	596	599	-27.1	99.5	0.7	1.1
1973	2	8	-6	10	618	624	-58.2	99.0	0.3	1.3
1974	4	9	-5	14	705	710	-39.5	99.2	0.6	1.3
1975	4	14	-10	17	832	841	-58.0	98.8	0.4	1.6
1976	4	13	-9	17	886	895	-52.4	99.0	0.5	1.5
1977	5	13	-8	18	937	945	-45.2	99.2	0.5	1.3
1978	5	16	-10	21	992	1,002	-50.3	99.0	0.5	1.6

[1]Total imports less re-exports; [2]Shipments plus imports less exports.

TABLE 11.4

TOBACCO PRODUCTS INDUSTRIES: EXPORTS AND EXPORT ORIENTATION, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
	(MILLIONS OF DOLLARS)											
DOMESTIC EXPORTS												
TOTAL	3	3	4	3	3	4	2	4	4	4	5	5
TOBACCO PRODUCTS MFRS.	3	3	4	3	3	4	2	4	4	4	5	5
EXPORT ORIENTATION	(PERCENT)											
TOTAL	0.6	0.6	0.8	0.6	0.5	0.7	0.3	0.6	0.4	0.5	0.5	0.5
TOBACCO PRODUCTS MFRS.	0.9	1.0	1.2	0.9	0.7	0.9	0.5	0.8	0.6	0.6	0.7	0.7

TABLE 11.5

TOBACCO PRODUCTS INDUSTRIES: SHIPMENTS AND IMPLICIT SELF-SUFFICIENCY,[1] 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
	(MILLIONS OF DOLLARS)											
FACTORY SHIPMENTS												
TOTAL	493	509	488	527	575	596	618	705	832	886	937	992
TOBACCO PRODUCTS MFRS.	332	331	346	376	400	421	454	505	582	657	725	737
SHIPMENTS/CANADIAN MARKET	(PERCENT)											
TOTAL	99.6	99.7	99.7	99.6	99.3	99.5	99.0	99.2	98.8	99.0	99.2	99.0
TOBACCO PRODUCTS MFRS.	99.4	99.5	99.5	99.5	99.0	99.3	98.7	99.0	98.3	98.6	98.9	98.6

TABLE 11.6

TOBACCO PRODUCTS INDUSTRIES: IMPORTS AND IMPORT PENETRATION, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
	(MILLIONS OF DOLLARS)											
ADJUSTED IMPORTS												
TOTAL	5	5	6	5	7	7	8	9	14	13	13	16
TOBACCO PRODUCTS MFRS.	5	5	6	5	7	7	8	9	14	13	13	16
IMPORT PENETRATION	(PERCENT)											
TOTAL	1.0	1.0	1.1	1.0	1.2	1.1	1.3	1.3	1.6	1.5	1.3	1.6
TOBACCO PRODUCTS MFRS.	1.5	1.5	1.6	1.4	1.7	1.6	1.8	1.9	2.3	2.0	1.7	2.1

[1] Ratio of shipments to Canadian market

TABLE 11.7

TOBACCO PRODUCTS: OECD IMPORTS BY SOURCE[1]

DISTRIBUTION AND AVERAGE ANNUAL RATE OF CHANGE

	DISTRIBUTION percent											Percent Change
	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1967-1977
Total Imports	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	
Developed Market Economies												
Netherlands	21.4	24.0	22.5	25.1	29.4	32.2	33.3	34.5	33.2	30.6	30.7	3.7
West Germany	12.1	16.5	15.5	10.2	10.0	7.6	10.9	12.1	14.3	16.1	16.8	3.3
Belgium-Luxembourg	18.5	18.5	16.9	15.7	13.6	14.6	14.9	16.7	15.5	14.9	14.4	- 2.5
United States	19.1	15.0	16.9	19.1	16.1	14.3	12.7	11.4	11.7	12.3	12.6	- 4.1
United Kingdom	7.5	6.5	7.0	7.7	7.5	7.0	6.1	5.3	5.2	4.9	4.8	- 4.4
France	1.2	1.5	2.4	2.5	3.6	4.5	4.0	4.2	4.4	4.6	4.5	14.1
Switzerland	3.5	3.5	3.8	4.7	4.3	3.9	5.0	2.9	3.0	2.6	2.3	- 4.1
Canada	0.2	0.3	0.4	0.4	0.4	0.3	0.2	0.3	0.3	0.4	0.3	4.1
Japan	..	..	..	..	..	..	..	..	..	..	..	..
Total EEC (9)	64.7	72.0	68.5	65.5	68.1	70.3	72.0	75.0	74.4	73.3	73.8	1.3
Other Developed Market Economies	5.2	3.0	3.8	4.3	4.3	5.0	4.8	4.4	4.4	4.5	4.3	- 1.9
OPEC	0.4	0.4	0.4	0.4	0.4	0.3	0.2	0.3	0.3	0.4	0.3	- 2.8
Other Developing Market Economies	6.9	6.0	6.1	6.0	6.5	5.9	5.2	5.6	5.9	6.5	6.6	- 0.4
Cuba	4.6	3.0	3.3	3.0	3.6	3.6	3.2	3.6	3.5	3.1	3.3	- 3.3
Centrally Planned Economies	..	..	..	..	..	..	..	..	..	..	..	..
ADDENDUM												
Total Imports in Millions of U.S. Dollars	173	200	213	235	279	357	504	588	708	722	875	

TABLE 11.8

TOBACCO PRODUCTS: PERCENTAGE OF CANADA'S EXPORTS BY DESTINATION[2]

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	OECD Share 1977
O.E.C.D.	90.8	88.6	91.0	86.3	82.0	84.9	65.3	80.3	75.7	75.6	72.1	100.0
United States	10.6	17.9	19.9	30.5	42.8	29.4	55.4	34.1	60.5	62.2	66.9	92.8
Japan	..	0.3	0.8	0.9	0.9	1.6	3.3	1.8	1.8	0.4	0.7	1.0
E.E.C. (9)	77.4	67.9	67.9	50.6	35.2	51.3	2.8	43.4	11.2	12.5	3.4	4.7
United Kingdom	73.8	62.3	65.5	47.1	29.6	47.0	1.5	0.6	1.1	4.8	1.5	2.1
Rest of World	9.2	11.4	9.0	13.7	18.0	15.1	34.7	19.7	24.3	24.4	27.9	

1 For source and notes see Table 2.6.

2 For source and notes see Table 2.7.

TABLE 11.9

TOBACCO PRODUCTS: GROWTH OF FOREIGN IMPORTS[1]
(percent)

	OECD	U.S.A.	JAPAN	EEC (9)*	OTHER OECD	DEVELOPING COUNTRIES**
1967	-	-	-	-	-	-
1968	15.6	50.0	-14.3	..	17.0	15.4
1969	7.0	8.3	33.3	..	6.7	4.3
1970	9.8	38.5	..	5.9	8.5	14.2
1971	18.7	5.6	25.0	27.8	18.8	5.3
1972	28.0	42.1	..	8.7	30.0	13.9
1973	41.2	3.7	70.0	68.0	41.4	18.9
1974	16.7	28.6	35.3	-26.2	19.4	24.9
1975	20.4	11.1	39.1	- 6.5	21.9	29.5
1976	3.5	32.5	-21.9	10.3	2.6	20.7
1977	19.4	1.9	32.0	15.6	20.5	22.0

TABLE 11.10

TOBACCO PRODUCTS: CANADA'S TRADE SHARE BY MARKET[1]
(percent)

1967	0.2	2.4	..	0.3	..	..
1968	0.3	3.8	0.2	0.4	0.1	..
1969	0.4	5.1	0.6	0.4	0.1	..
1970	0.5	5.2	0.4	0.3	0.1	..
1971	0.4	4.8	0.3	0.5	..	..
1972	0.4	3.8	0.6	0.4	..	..
1973	0.3	3.8	0.4	0.1	..	0.5
1974	0.3	3.5	0.3	0.2	..	0.4
1975	0.3	4.5	0.2	0.1	..	0.3
1976	0.4	4.7	0.1	0.4	..	0.2
1977	0.4	5.1	0.1	0.7	..	0.2

1 For source and notes see Table 2.8.

TABLE 11.11

TOBACCO PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE OECD[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
	Total OECD Imports	Imports from Canada	Total OECD Imports 1967	Total OECD Imports 1977	Imports from Canada 1967	Imports from Canada 1977
TOTAL, TOBACCO PRODUCTS	17.6	29.1	100.0	100.0	100.0	100.0
Tobacco	17.6	29.1	100.0	100.0	100.0	100.0

TABLE 11.12

TOBACCO PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE OECD[1]
(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, TOBACCO PRODUCTS	0.2	0.3	0.4	0.5	0.4	0.4	0.3	0.3	0.3	0.4	0.4
Tobacco	0.2	0.3	0.4	0.5	0.4	0.4	0.3	0.3	0.3	0.4	0.4

TABLE 11.13

TOBACCO PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE U.S.A.[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
	Total U.S.A. Imports	Imports from Canada	Total U.S.A. Imports 1967	Total U.S.A. Imports 1977	Imports from Canada 1967	Imports from Canada 1977
TOTAL, TOBACCO PRODUCTS	21.5	30.9	100.0	100.0	100.0	100.0
Tobacco	21.5	30.9	100.0	100.0	100.0	100.0

TABLE 11.14

TOBACCO PRODUCTS: CANADA'S SHARE OF IMPORTS IN THE U.S.A.[1]
(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, TOBACCO PRODUCTS	2.4	3.8	5.1	5.2	4.8	3.8	3.8	3.5	4.5	4.7	5.1
Tobacco	2.4	3.8	5.1	5.2	4.8	3.8	3.8	3.5	4.5	4.7	5.1

1 For source and notes see Table 2.8.

TABLE 11.15

TOBACCO PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE E.E.C.[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
	Total E.E.C. Imports	Imports from Canada	Total E.E.C. Imports 1967	Total E.E.C. Imports 1977	Imports from Canada 1967	Imports from Canada 1977
TOTAL, TOBACCO PRODUCTS	7.9	19.2	100.0	100.0	100.0	100.0
Tobacco	7.9	19.2	100.0	100.0	100.0	100.0

TABLE 11.16

TOBACCO PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE E.E.C. (EXCLUDING INTRA TRADE)[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, TOBACCO PRODUCTS	0.3	0.4	0.4	0.3	0.5	0.4	0.1	0.2	0.1	0.4	0.7
Tobacco	0.3	0.4	0.4	0.3	0.5	0.4	0.1	0.2	0.1	0.4	0.7

[1] For source and notes see Table 2.8.

TABLE 11.17

RUBBER AND PLASTICS PRODUCTS INDUSTRIES: TRADE MEASURES, 1967 TO 1978

YEAR	DOMESTIC EXPORTS	ADJUSTED IMPORTS[1]	TRADE BALANCE	TRADE TURNOVER (EXPORTS +IMPORTS)	CANADIAN FACTORY SHIPMENTS	CANADIAN MARKET[2]	TRADE BALANCE / TRADE TURNOVER	SHIPMENTS / CANADIAN MARKET	EXPORT ORIENTATION	IMPORT PENETRATION
	(MILLIONS OF DOLLARS)						(PERCENT)			
1967	41	136	-95	178	857	953	-53.6	90.0	4.8	14.3
1968	39	179	-140	218	941	1,081	-64.2	87.1	4.1	16.5
1969	44	219	-175	262	1,065	1,244	-66.5	85.9	4.1	17.6
1970	52	208	-155	260	1,073	1,229	-59.7	87.4	4.9	16.9
1971	52	246	-194	297	1,164	1,358	-65.3	85.7	4.4	18.1
1972	70	303	-234	373	1,317	1,551	-62.7	84.9	5.3	19.6
1973	112	385	-273	496	1,577	1,851	-55.1	85.2	7.1	20.8
1974	120	634	-514	754	1,834	2,347	-68.1	78.1	6.6	27.0
1975	133	597	-465	730	1,956	2,420	-63.7	80.8	6.8	24.7
1976	233	555	-322	787	2,314	2,636	-40.9	87.8	10.1	21.0
1977	228	695	-467	923	2,514	2,981	-50.6	84.3	9.1	23.3
1978	307	797	-491	1,104	2,954	3,444	-44.5	85.8	10.4	23.1

[1]Total imports less re-exports; [2]Shipments plus imports less exports.

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TABLE 11.18

RUBBER AND PLASTICS PRODUCTS INDUSTRIES: EXPORTS AND EXPORT ORIENTATION, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
	(MILLIONS OF DOLLARS)											
DOMESTIC EXPORTS												
TOTAL	41	39	44	52	52	70	112	120	133	233	228	307
RUBBER PRODUCTS INDUSTRIES	25	21	25	33	31	47	75	81	94	190	168	230
PLASTIC FABRICATING INDUSTRIES, N.E.S.	17	18	19	20	20	23	36	39	39	43	61	77
	(PERCENT)											
EXPORT ORIENTATION												
TOTAL	4.8	4.1	4.1	4.9	4.4	5.3	7.1	6.6	6.8	10.1	9.1	10.4
RUBBER PRODUCTS INDUSTRIES	4.2	3.8	3.9	5.2	4.7	6.4	9.0	9.3	9.4	15.6	21.0	15.5
PLASTIC FABRICATING INDUSTRIES, N.E.S.	6.1	4.7	4.4	4.5	4.0	3.9	4.9	4.1	4.0	3.9	4.9	5.2

TABLE 11.19

RUBBER AND PLASTICS PRODUCTS INDUSTRIES: SHIPMENTS AND IMPLICIT SELF-SUFFICIENCY[1], 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
	(MILLIONS OF DOLLARS)											
FACTORY SHIPMENTS												
TOTAL	857	941	1,065	1,073	1,164	1,317	1,577	1,834	1,956	2,314	2,514	2,954
RUBBER PRODUCTS INDUSTRIES	584	565	633	635	663	723	836	875	999	1,212	798	1,481
PLASTIC FABRICATING INDUSTRIES, N.E.S.	273	376	432	438	501	595	741	958	957	1,102	1,239	1,473
	(PERCENT)											
SHIPMENTS/CANADIAN MARKET												
TOTAL	90.0	87.1	85.9	87.4	85.7	84.9	85.2	78.1	80.8	87.8	84.3	85.8
RUBBER PRODUCTS INDUSTRIES	90.7	84.7	83.9	86.1	83.1	81.7	81.7	70.1	75.5	88.5	73.8	83.7
PLASTIC FABRICATING INDUSTRIES, N.E.S.	88.5	90.8	89.1	89.2	89.4	89.3	89.6	87.2	87.1	87.1	87.1	89.0

TABLE 11.20

RUBBER AND PLASTICS INDUSTRIES: IMPORTS AND IMPORT PENETRATION, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
	(MILLIONS OF DOLLARS)											
ADJUSTED IMPORTS												
TOTAL	136	179	219	208	246	303	385	634	597	555	695	797
RUBBER PRODUCTS INDUSTRIES	84	123	146	135	166	209	262	455	417	348	451	519
PLASTIC FABRICATING INDUSTRIES, N.E.S.	52	56	72	73	79	95	123	179	180	207	244	279
	(PERCENT)											
IMPORT PENETRATION												
TOTAL	14.3	16.5	17.6	16.9	18.1	19.6	20.8	27.0	24.7	21.0	23.3	23.1
RUBBER PRODUCTS INDUSTRIES	13.1	18.4	19.4	18.3	20.9	23.6	25.6	36.4	31.6	25.4	41.7	29.3
PLASTIC FABRICATING INDUSTRIES, N.E.S.	16.9	13.5	14.9	14.8	14.2	14.2	14.8	16.3	16.4	16.3	17.2	16.6

[1] Ratio of shipments to Canadian markets.

TABLE 11.21

RUBBER AND PLASTICS PRODUCTS: OECD IMPORTS BY SOURCE[1]

DISTRIBUTION AND AVERAGE ANNUAL RATE OF CHANGE

	DISTRIBUTION percent											Percent Change
	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1967-1977
Total Imports	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	
Developed Market Economies												
West Germany	17.5	17.1	17.5	16.7	16.6	17.5	18.9	19.1	17.7	17.4	18.0	0.3
France	11.1	10.9	10.5	10.9	11.3	12.1	12.4	12.0	13.1	11.9	12.3	1.0
Italy	8.5	8.9	9.1	9.6	10.8	11.1	10.7	9.9	10.4	9.8	10.1	1.7
United States	12.8	12.8	12.1	10.4	9.8	8.9	8.8	11.1	9.7	8.6	8.4	- 4.1
United Kingdom	10.5	9.1	9.2	9.6	9.2	7.7	6.9	6.6	7.8	7.8	7.3	- 3.6
Belgium-Luxembourg	5.0	5.0	4.9	4.6	4.5	5.0	5.2	5.3	5.5	5.0	5.1	0.2
Japan	8.4	8.8	8.4	7.9	8.1	7.1	4.8	4.1	3.9	4.5	5.1	- 4.9
Netherlands	4.9	4.6	4.5	4.6	4.7	4.6	4.7	4.5	4.8	4.7	4.5	- 0.8
Canada	2.4	1.8	1.5	2.2	1.9	1.9	2.6	1.9	2.2	3.9	2.8	1.6
Spain	0.6	1.3	1.4	1.6	2.3	2.4	2.8	2.9	3.4	2.7	2.7	16.2
Total EEC (9)	60.1	58.0	58.1	58.6	59.8	60.8	61.7	60.4	62.0	59.2	60.1	..
Other Developed Market Economies	10.0	10.0	9.9	10.3	9.9	9.6	9.7	9.5	9.4	8.9	9.0	- 1.0
OPEC	0.1	0.1	..	0.1	0.1	0.1	0.1	..	..	..	..	- 6.7
Other Developing Market Economies	4.3	6.1	7.5	7.9	3.8	8.1	8.7	9.0	8.4	11.2	11.1	9.9
Taiwan	1.0	1.5	1.9	2.3	-	4.1	4.4	4.2	3.7	5.2	5.1	17.7
Centrally Planned Economies	1.5	1.2	1.0	1.0	4.2	1.1	0.8	0.9	1.0	0.9	1.0	- 4.0
ADDENDUM												
Total Imports in Millions of U.S. Dollars	1,435	1,775	2,170	2,645	3,180	3,944	5,459	7,209	7,401	8,591	9,950	

TABLE 11.22

RUBBER AND PLASTICS PRODUCTS: PERCENTAGE OF CANADA'S EXPORTS BY DESTINATION[2]

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	OECD Share 1977
O.E.C.D.	85.1	86.9	88.3	87.9	86.8	87.8	89.5	87.7	89.8	93.9	93.4	100.0
United States	66.9	67.8	70.4	72.3	71.6	75.2	78.2	76.5	77.8	87.7	86.2	92.3
Japan	0.1	0.2	0.4	0.5	0.5	0.1	0.4	0.2	0.5	0.4	0.2	0.2
E.E.C. (9)	10.9	12.0	9.6	8.0	7.6	6.0	6.0	5.4	5.9	3.3	3.8	4.1
United Kingdom	6.3	7.2	6.5	5.3	4.6	3.6	3.3	3.2	2.7	1.5	1.7	1.8
Rest of World	14.9	13.1	11.7	12.1	13.2	12.2	10.5	12.3	10.2	6.1	6.6	

1 For source and notes see Table 2.6.

2 For source and notes see Table 2.7.

TABLE 11.23

RUBBER AND PLASTICS PRODUCTS: GROWTH OF FOREIGN IMPORTS[1]
(percent)

	OECD	U.S.A.	JAPAN	EEC (9)*	OTHER OECD	DEVELOPING COUNTRIES**
1967	-	-	-	-	-	-
1968	23.7	48.0	22.2	22.7	17.9	10.4
1969	22.3	26.4	36.4	18.5	21.5	7.5
1970	21.9	27.6	53.3	21.5	19.8	9.1
1971	20.2	11.6	26.1	19.3	23.3	9.0
1972	24.0	35.0	55.2	17.3	21.4	8.7
1973	38.4	31.2	117.8	37.0	39.7	21.7
1974	32.1	9.9	75.5	30.7	38.2	63.6
1975	2.7	-0.8	-27.3	8.9	3.6	34.5
1976	16.1	49.2	13.6	12.4	8.6	2.3
1977	15.8	7.5	13.4	21.6	17.7	16.2

TABLE 11.24

RUBBER AND PLASTICS PRODUCTS: CANADA'S TRADE SHARE BY MARKET[1]
(percent)

1967	2.4	11.1	0.3	2.0	0.3	1.3
1968	1.8	7.2	0.3	1.7	0.2	0.9
1969	1.5	5.8	0.2	1.4	0.2	0.9
1970	2.1	8.4	0.3	1.3	0.2	1.0
1971	1.9	7.7	1.7	1.4	0.2	0.9
1972	1.9	7.5	0.9	1.3	0.1	0.8
1973	2.6	11.1	0.4	1.2	0.1	0.8
1974	1.9	9.7	0.5	1.1	0.1	0.7
1975	2.2	11.6	0.8	1.1	0.1	0.5
1976	3.9	17.1	0.8	0.8	0.1	0.6
1977	2.8	12.8	0.5	0.8	0.1	0.5

[1] For source and notes see Table 2.8.

TABLE 11.25

RUBBER AND PLASTICS PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE OECD[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
	Total OECD Imports	Imports from Canada	Total OECD Imports 1967	Total OECD Imports 1977	Imports from Canada 1967	Imports from Canada 1977
TOTAL, RUBBER AND PLASTIC PRODUCTS	21.4	23.3	100.0	100.0	100.0	100.0
Reclaimed rubber	8.7	n.a.	0.4	0.1	..	..
Waste and scrap of rubber	13.7	- 3.3	0.3	0.2	0.1	..
Materials of rubber	17.3	- 2.7	10.6	7.5	6.4	0.6
Articles of rubber	20.9	24.3	47.5	45.7	59.4	64.4
Rubber clothing	19.7	- 5.1	1.0	0.8	0.9	0.1
Footwear with rubber	22.8	3.9	8.1	9.1	2.7	0.5
Articles of plastic	22.9	24.8	32.1	36.5	30.5	34.5

TABLE 11.26

RUBBER AND PLASTICS PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE OECD[1]
(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, RUBBER AND PLASTIC PRODUCTS	2.4	1.8	1.5	2.1	1.9	1.9	2.6	1.9	2.2	3.9	2.8
Reclaimed rubber	0.1	0.2	0.2	..	-	0.1	..	0.1	0.1	-	-
Waste and scrap of rubber	0.8	0.8	0.3	0.1	-	..	-	..	..	0.1	0.2
Materials of rubber	1.4	1.6	1.5	1.1	1.3	0.8	0.4	0.4	0.4	0.5	[illegible]
Articles of rubber	2.9	1.6	1.2	2.5	1.9	2.1	3.5	2.5	3.0	6.7	[illegible]
Rubber clothing	2.2	1.5	1.0	0.9	0.5	0.6	0.3	0.3	0.1	0.1	0.2
Footwear with rubber	0.8	0.7	0.7	1.0	0.8	0.6	0.6	0.4	0.3	0.3	0.2
Articles of plastic	2.2	2.6	2.2	2.4	2.6	2.4	2.5	2.1	2.2	2.2	2.6

TABLE 11.27

RUBBER AND PLASTICS PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE U.S.A.[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
	Total U.S.A. Imports	Imports from Canada	Total U.S.A. Imports 1967	Total U.S.A. Imports 1977	Imports from Canada 1967	Imports from Canada 1977
TOTAL, RUBBER AND PLASTIC PRODUCTS	23.5	25.3	100.0	100.0	100.0	100.0
Reclaimed rubber	-	-	-	-	-	-
Waste and scrap of rubber	-	-	-	-	-	-
Materials of rubber	3.9	- 3.7	0.5	0.1	1.4	0.1
Articles of rubber	26.9	26.0	37.6	49.3	62.3	66.0
Rubber clothing	-	-	-	-	-	-
Footwear with rubber	22.2	0.5	23.4	21.0	3.1	0.3
Articles of plastic	20.3	25.5	38.5	29.7	33.1	33.6

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[1] For source and notes see Table 2.8.

TABLE 11.28

RUBBER AND PLASTICS PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE U.S.A.[1]
(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, RUBBER AND PLASTIC PRODUCTS	11.1	7.2	5.8	8.4	7.7	7.5	11.1	9.7	11.6	17.1	12.8
Reclaimed rubber	-	-	-	-	-	-	-	-	-	-	-
Waste and scrap of rubber	-	-	-	-	-	-	-	-	-	-	-
Materials of rubber	33.4	53.9	42.2	57.8	63.3	44.6	32.6	40.8	49.0	33.8	15.5
Articles of rubber	18.3	8.1	6.1	12.5	9.0	8.6	14.3	12.5	16.7	28.1	17.1
Rubber clothing	-	-	-	-	-	-	-	-	-	-	-
Footwear with rubber	1.5	1.3	1.1	1.8	1.3	0.9	1.1	0.8	0.4	0.5	0.2
Articles of plastic	9.5	9.3	7.6	8.3	11.3	10.3	12.8	11.0	10.8	10.4	14.4

TABLE 11.29

RUBBER AND PLASTICS PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE E.E.C.[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
	Total E.E.C. Imports	Imports from Canada	Total E.E.C. Imports 1967	Total E.E.C. Imports 1977	Imports from Canada 1967	Imports from Canada 1977
TOTAL, RUBBER AND PLASTIC PRODUCTS	20.8	10.0	100.0	100.0	100.0	100.0
Reclaimed rubber	16.5	-	0.2	0.2	-	-
Waste and scrap of rubber	20.4	- 3.3	0.2	0.2	1.1	0.3
Materials of rubber	18.7	5.6	10.7	9.0	13.1	8.7
Articles of rubber	19.3	3.8	48.0	42.5	52.3	29.2
Rubber clothing	26.4	- 4.0	1.5	2.4	6.4	1.6
Footwear with rubber	17.1	4.7	11.2	8.2	1.2	0.7
Articles of plastic	24.3	19.5	28.1	37.4	25.9	59.4

TABLE 11.30

RUBBER AND PLASTICS PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE E.E.C. (EXCLUDING INTRA-TRADE)[1]
(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, RUBBER AND PLASTIC PRODUCTS	2.0	1.7	1.4	1.3	1.4	1.3	1.2	1.1	1.1	0.8	0.8
Reclaimed rubber	-	-	-	-	-	0.6	0.3	-	0.4	-	-
Waste and scrap of rubber	10.1	8.9	3.6	0.5	-	0.2	-	0.1	0.2	1.0	1.2
Materials of rubber	2.5	3.6	3.1	3.7	3.9	2.9	1.3	0.9	1.5	1.3	0.8
Articles of rubber	2.2	1.5	1.1	1.0	0.9	0.7	1.2	0.7	0.6	0.5	0.6
Rubber clothing	8.7	7.0	3.3	3.7	2.0	2.3	0.8	0.7	0.2	0.3	0.6
Footwear with rubber	0.2	0.1	0.8	0.1	0.8	1.2	1.6	1.3	0.7	0.3	0.1
Articles of plastic	1.9	1.7	1.5	1.5	1.6	1.8	1.1	1.5	1.8	1.2	1.3

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[1] For source and notes see Table 2.8.

TABLE 11.31

LEATHER INDUSTRIES: TRADE MEASURES, 1967 TO 1978

YEAR	DOMESTIC EXPORTS	ADJUSTED IMPORTS[1]	TRADE BALANCE	TRADE TURNOVER (EXPORTS + IMPORTS)	CANADIAN FACTORY SHIPMENTS	CANADIAN MARKET[2]	TRADE BALANCE / TRADE TURNOVER	SHIPMENTS / CANADIAN MARKET	EXPORT ORIENTATION	IMPORT PENETRATION
	(MILLIONS OF DOLLARS)						(PERCENT)			
1967	18	62	-45	80	369	414	-55.6	89.2	4.8	15.1
1968	22	85	-63	107	396	459	-59.0	86.3	5.5	18.5
1969	23	96	-73	119	412	486	-61.7	84.9	5.5	19.8
1970	27	107	-80	134	397	477	-59.4	83.3	6.8	22.4
1971	24	122	-98	145	420	518	-67.3	81.1	5.7	23.5
1972	26	150	-124	177	447	571	-70.1	78.3	5.9	26.3
1973	34	166	-132	201	509	641	-65.8	79.4	6.7	26.0
1974	30	214	-184	243	570	754	-75.6	75.6	5.2	28.3
1975	40	281	-241	322	619	860	-74.9	72.0	6.5	32.7
1976	52	340	-288	393	696	984	-73.3	70.7	7.5	34.6
1977	61	361	-300	422	690	991	-71.3	69.7	8.8	36.4
1978	80	411	-331	491	917	1,247	-67.4	73.5	8.7	32.9

[1]Total imports less re-exports; [2]Shipments plus imports less exports.

TABLE 11.32

LEATHER INDUSTRIES: EXPORTS AND EXPORT ORIENTATION, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
	(MILLIONS OF DOLLARS)											
DOMESTIC EXPORTS												
TOTAL	18	22	23	27	24	26	34	30	40	52	61	80
LEATHER TANNERIES	10	12	11	11	10	10	13	11	13	19	19	25
SHOE FACTORIES	5	6	7	11	9	9	13	11	18	23	31	40
LEATHER GLOVE FACTORIES	0	0	1	1	0	0	0	0	0	0	0	0
LUGGAGE, HAND-BAGGAGE, ETC. MFRS.	3	4	4	5	4	6	8	8	8	10	11	15
BOOT & SHOE FINDING MFRS.	1	1	1	2	2	3	3	3	3	5	7	10
MISC. LEATHER PRODUCTS MFRS.	2	3	3	3	2	3	5	5	5	5	3	5
	(PERCENT)											
EXPORT ORIENTATION												
TOTAL	4.8	5.5	5.5	6.8	5.7	5.9	6.7	5.2	6.5	7.5	8.8	8.7
LEATHER TANNERIES	16.2	18.8	16.3	16.0	13.4	12.8	13.5	11.4	12.9	14.9	15.8	14.3
SHOE FACTORIES	2.3	2.5	2.9	4.6	3.9	3.7	4.6	3.4	5.2	5.9	7.7	7.8
LEATHER GLOVE FACTORIES	2.5	2.5	3.8	3.7	2.6	1.4	1.0	0.9	0.7	1.0	0.5	0.6
LUGGAGE, HAND-BAGGAGE, ETC. MFRS.	3.8	4.6	5.0	6.2	4.9	6.9	7.8	6.1	6.0	6.9	7.5	7.7
BOOT & SHOE FINDING MFRS.	5.6	5.2	5.8	13.0	11.2	17.3	11.1	8.8	8.1	13.3	20.8	18.7
MISC. LEATHER PRODUCTS MFRS.	3.4	4.4	4.8	4.4	3.3	4.2	6.4	5.1	5.3	4.8	3.3	3.4

TABLE 11.33

LEATHER INDUSTRIES: SHIPMENTS AND IMPLICIT SELF-SUFFICIENCY,[1] 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
	(MILLIONS OF DOLLARS)											
FACTORY SHIPMENTS												
TOTAL	369	396	412	397	420	447	509	570	619	696	690	917
LEATHER TANNERIES	59	63	67	67	71	82	93	97	104	125	121	176
SHOE FACTORIES	220	237	246	232	242	252	286	321	351	397	399	506
LEATHER GLOVE FACTORIES	15	16	16	17	18	20	24	27	25	27	31	39
LUGGAGE, HAND-BAGGAGE,ETC. MFRS.	76	80	83	81	89	93	105	125	139	148	140	196
BOOT & SHOE FINDING MFRS.	15	18	18	16	17	19	31	32	37	37	34	55
MISC. LEATHER PRODUCTS MFRS.	61	63	65	64	71	74	74	93	102	110	106	141
SHIPMENTS/CANADIAN MARKET	(PERCENT)											
TOTAL	89.2	86.3	84.9	83.3	81.1	78.3	79.4	75.6	72.0	70.7	69.7	73.5
LEATHER TANNERIES	86.0	79.1	79.8	80.3	75.9	71.0	73.3	64.7	53.9	60.3	65.0	68.8
SHOE FACTORIES	91.0	88.6	86.2	83.6	81.0	79.4	80.7	76.7	75.5	72.4	69.8	75.1
LEATHER GLOVE FACTORIES	79.4	78.3	76.9	77.8	79.5	75.8	74.7	78.9	74.3	71.2	66.3	67.2
LUGGAGE, HAND-BAGGAGE,ETC. MFRS.	88.9	87.5	87.3	86.6	86.5	83.5	83.0	82.7	82.6	77.1	74.7	75.3
BOOT & SHOE FINDING MFRS.	90.6	88.2	88.0	91.4	90.2	92.5	98.4	92.7	93.5	94.6	97.1	98.8
MISC. LEATHER PRODUCTS MFRS.	88.4	87.3	87.1	85.5	85.7	81.4	77.8	79.7	79.3	72.5	69.5	68.8

1 Ratio of shipments to Canadain market.

TABLE 11.34

LEATHER INDUSTRIES: IMPORTS AND IMPORT PENETRATION, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
	(MILLIONS OF DOLLARS)											
ADJUSTED IMPORTS												
TOTAL	62	85	96	107	122	150	166	214	281	340	361	411
LEATHER TANNERIES	19	29	28	27	32	44	47	64	103	101	84	105
SHOE FACTORIES	27	37	47	56	66	75	82	108	132	174	203	207
LEATHER GLOVE FACTORIES	4	5	6	6	5	7	8	8	9	11	16	19
LUGGAGE, HAND-BAGGAGE,ETC. MFRS.	12	15	16	17	18	25	30	34	38	54	58	79
BOOT & SHOE FINDING MFRS.	2	3	3	4	4	5	4	5	5	7	8	11
MISC. LEATHER PRODUCTS MFRS.	10	12	13	14	14	20	26	28	32	47	50	68
	(PERCENT)											
IMPORT PENETRATION												
TOTAL	15.1	18.5	19.8	22.4	23.5	26.3	26.0	28.3	32.7	34.6	36.4	32.9
LEATHER TANNERIES	27.9	35.8	33.3	32.6	34.3	38.1	36.6	42.7	53.1	48.7	45.3	41.1
SHOE FACTORIES	11.1	13.6	16.3	20.3	22.2	23.6	23.0	25.9	28.4	31.8	35.6	30.8
LEATHER GLOVE FACTORIES	22.5	23.7	26.0	25.1	22.5	25.2	26.1	21.8	26.3	29.5	34.0	33.2
LUGGAGE, HAND-BAGGAGE,ETC. MFRS.	14.5	16.5	17.1	18.7	17.7	22.3	23.5	22.3	22.4	28.3	31.0	30.5
BOOT & SHOE FINDING MFRS.	14.4	16.4	17.1	20.4	19.9	23.5	12.5	15.4	14.0	18.0	23.1	19.6
MISC. LEATHER PRODUCTS MFRS.	14.6	16.6	17.1	18.3	17.2	22.0	27.2	24.4	24.9	31.0	32.8	33.5

TABLE 11.35

LEATHER PRODUCTS: OECD IMPORTS BY SOURCE[1] DISTRIBUTION AND AVERAGE ANNUAL RATE OF CHANGE

	DISTRIBUTION percent											Percent Change
	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1967-1977
Total Imports	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	
Developed Market Economies												
Italy	25.7	28.4	29.2	29.6	28.0	27.0	23.7	24.3	27.2	25.1	27.2	0.2
France	9.7	9.2	8.3	8.5	9.1	9.1	8.5	8.0	7.2	5.7	5.8	- 5.0
Spain	3.1	4.3	5.2	5.2	7.0	7.4	6.8	7.1	7.4	6.5	5.5	5.9
West Germany	9.1	8.5	8.3	7.6	7.0	6.4	6.4	5.8	5.5	5.6	5.5	- 4.9
United Kingdom	7.3	6.8	6.8	6.4	5.7	4.8	4.4	4.4	3.9	3.6	3.4	- 7.4
United States	2.9	2.5	2.0	1.7	1.7	1.9	2.0	2.3	2.5	2.1	1.8	- 4.7
Japan	5.7	5.7	4.9	5.1	4.9	3.9	3.1	2.1	1.5	1.5	1.5	-12.5
Canada	1.0	1.1	1.0	1.3	1.3	1.0	0.9	0.9	0.7	0.7	0.6	- 5.0
Total EEC (9)	61.5	60.8	60.1	59.5	56.6	53.7	49.1	48.3	48.7	44.3	46.1	- 2.8
Other Developed Market Economies	8.2	7.8	8.0	8.1	8.3	8.5	8.6	8.4	8.7	8.2	8.1	- 0.1
OPEC	0.3	0.3	0.4	0.3	0.3	0.4	0.5	0.4	0.3	0.5	0.4	2.9
Other Developing Market Economies	14.1	14.7	15.6	15.6	14.8	19.8	25.1	26.3	26.0	32.3	31.9	8.5
S. Korea	0.2	0.2	0.2	0.5	0.9	1.2	2.4	4.4	5.8	8.6	9.0	46.3
Taiwan	0.5	0.7	0.8	1.2	-	-	3.2	4.1	4.1	5.6	5.9	28.0
Brazil	0.4	0.3	0.5	1.0	1.4	2.3	3.1	3.0	3.4	3.6	3.2	23.1
Hong Kong	3.9	3.9	3.8	3.9	3.6	3.4	3.5	3.3	3.0	3.2	3.0	- 2.6
India	3.9	4.1	4.2	3.1	3.4	3.9	4.3	3.2	2.8	3.2	2.7	- 3.6
Centrally Planned Economies	3.1	2.7	2.8	3.7	5.1	3.4	4.0	4.1	4.2	4.0	4.0	2.6
ADDENDUM												
Total Imports in Millions of U.S. Dollars	1,443	1,797	2,190	2,383	2,843	3,813	4,844	5,606	6,391	8,093	9,359	

TABLE 11.36

LEATHER PRODUCTS: PERCENTAGE OF CANADA'S EXPORTS BY DESTINATION[2]

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	OECD Share 1977
O.E.C.D.	83.2	88.0	92.4	93.9	92.3	93.9	91.3	91.2	85.7	89.9	95.1	100.0
United States	62.9	67.4	73.2	82.2	81.4	80.6	76.5	77.5	72.5	80.2	84.6	89.0
Japan	..	..	..	..	1.4	1.1	0.4	0.2	0.7	0.4	0.2	0.2
E.E.C. (9)	16.9	18.8	17.9	9.5	8.5	11.2	13.1	11.2	10.8	7.4	8.4	8.8
United Kingdom	15.2	17.5	16.5	8.2	7.3	8.8	12.1	10.4	9.4	6.6	5.0	5.3
Rest of World	16.8	12.0	7.6	7.1	7.7	6.1	8.7	8.8	14.3	10.1	4.9	

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1 For source and notes see Table 2.6.

2 For source and notes see Table 2.7.

TABLE 11.37

LEATHER PRODUCTS: GROWTH OF FOREIGN IMPORTS[1]
(percent)

	OECD	U.S.A.	JAPAN	EEC (9)*	OTHER OECD	DEVELOPING COUNTRIES**
1967	-	-	-	-	-	-
1968	24.5	37.8	43.8	21.7	18.2	8.3
1969	21.9	18.5	47.8	26.2	22.0	7.2
1970	8.8	20.4	8.8	-0.9	5.1	6.0
1971	19.3	13.8	13.5	35.5	18.5	2.6
1972	34.1	31.2	59.5	47.4	30.9	29.4
1973	27.0	15.6	110.4	50.1	22.9	24.9
1974	15.7	4.6	22.7	14.9	22.3	32.6
1975	14.0	8.8	-9.2	13.5	18.4	26.7
1976	26.6	41.5	36.3	27.8	18.7	23.9
1977	15.6	7.8	26.6	19.5	17.7	37.7

TABLE 11.38

LEATHER PRODUCTS: CANADA'S TRADE SHARE BY MARKET[1]
(percent)

1967	1.0	2.7	..	1.5	0.1	1.7
1968	1.1	2.7	..	1.6	0.1	1.6
1969	1.0	2.7	..	1.3	..	0.7
1970	1.3	3.3	0.1	0.8	..	1.4
1971	1.3	3.6	0.1	0.5	..	1.4
1972	1.1	3.1	0.1	0.5	..	0.5
1973	0.9	2.8	0.1	0.5	..	1.3
1974	0.9	3.1	0.2	0.4	..	0.6
1975	0.7	2.6	0.2	0.3	..	1.2
1976	0.7	2.2	0.1	0.3	0.1	1.0
1977	0.6	2.1	0.1	0.3	..	0.4

[1] For source and notes see Table 2.8.

TABLE 11.39

LEATHER PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE OECD[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
	Total OECD Imports	Imports from Canada	Total OECD Imports 1967	Total OECD Imports 1977	Imports from Canada 1967	Imports from Canada 1977
TOTAL, LEATHER PRODUCTS	20.6	14.6	100.0	100.0	100.0	100.0
Leather	15.4	7.9	29.8	19.2	47.2	26.0
Manufactures of leather	20.2	10.9	4.4	4.3	3.6	2.6
Travel goods, handbags, etc.	22.0	4.6	12.9	14.5	16.1	6.5
Leather clothing	27.7	30.1	6.8	12.1	7.2	25.5
Footwear with leather soles	21.4	19.5	45.8	49.2	25.9	39.4
Footwear with soles of wood or cork	33.1	-	0.1	0.3	-	-
Footwear with soles of other materials	30.1	7.2	0.2	0.4	-	..

TABLE 11.40

LEATHER PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE OECD[1]
(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, LEATHER PRODUCTS	1.0	1.1	1.0	1.3	1.3	1.1	0.9	0.9	0.7	0.7	0.[illegible]
Leather	1.6	1.7	1.4	1.4	1.1	0.8	0.7	0.7	0.6	0.8	0.8
Manufactures of leather	0.9	1.0	0.7	0.7	0.8	0.9	0.5	0.4	0.5	0.4	0.4
Travel goods, handbags, etc.	1.3	1.5	1.3	1.1	0.8	0.7	0.8	0.8	0.5	0.4	0.3
Leather clothing	1.1	1.5	2.0	3.8	6.0	4.6	3.0	3.0	2.1	1.7	1.3
Footwear with leather soles	0.6	0.6	0.6	0.8	0.6	0.5	0.6	0.5	0.5	0.5	0.5
Footwear with soles of wood or cork	-	0.3	-	-	-	-	-	-	..	-	-
Footwear with soles of other materials	..	-	-	-	-	-	..	..	..	..	..

TABLE 11.41

LEATHER PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE U.S.A.[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
	Total U.S.A. Imports	Imports from Canada	Total U.S.A. Imports 1967	Total U.S.A. Imports 1977	Imports from Canada 1967	Imports from Canada 1977
TOTAL, LEATHER PRODUCTS	19.4	16.6	100.0	100.0	100.0	100.0
Leather	8.8	10.5	17.0	6.7	42.7	25.0
Manufactures of leather	17.4	14.9	3.1	2.6	3.0	2.6
Travel goods, handbags, etc.	18.8	7.1	17.8	16.9	14.8	6.3
Leather clothing	23.3	34.4	11.9	16.3	6.4	26.4
Footwear with leather soles	21.0	18.8	50.3	57.5	33.0	39.6
Footwear with soles of wood or cork	-	-	-	-	-	-
Footwear with soles of other materials	-	-	-	-	-	[illegible]

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1 For source and notes see Table 2.8.

TABLE 11.42

LEATHER PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE U.S.A.[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, LEATHER PRODUCTS	2.7	2.7	2.7	3.3	3.6	3.1	2.8	3.1	2.6	2.2	2.1
Leather	6.7	6.7	6.1	7.1	6.9	4.6	4.2	5.3	6.1	6.3	7.9
Manufactures of leather	2.6	2.4	2.2	2.8	3.4	2.8	2.2	1.8	3.0	2.0	2.1
Travel goods, handbags, etc.	2.2	2.8	2.7	2.4	1.8	1.6	1.6	1.6	1.3	0.9	0.8
Leather clothing	1.4	2.4	3.6	7.4	14.2	11.3	8.9	10.8	8.1	4.7	3.4
Footwear with leather soles	1.8	1.6	1.7	2.0	1.4	1.3	1.5	1.4	1.4	1.3	1.5
Footwear with soles of wood or cork	-	-	-	-	-	-	-	-	-	-	-
Footwear with soles of other materials	-	-	-	-	-	-	-	-	-	-	-

TABLE 11.43

LEATHER PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE E.E.C.[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
	Total E.E.C. Imports	Imports from Canada	Total E.E.C. Imports 1967	Total E.E.C. Imports 1977	Imports from Canada 1967	Imports from Canada 1977
TOTAL, LEATHER PRODUCTS	24.7	6.4	100.0	100.0	100.0	100.0
Leather	18.4	1.0	52.2	31.0	59.0	35.2
Manufactures of leather	27.1	- 1.9	3.4	4.1	6.4	2.9
Travel goods, handbags, etc.	30.5	- 5.5	8.5	13.4	20.4	6.3
Leather clothing	40.3	14.5	4.5	14.6	7.9	16.4
Footwear with leather soles	26.5	27.7	30.7	35.4	6.3	39.2
Footwear with soles of wood or cork	29.7	-	0.1	0.2	-	-
Footwear with soles of other materials	35.3	n.a.	0.6	1.3	..	-

TABLE 11.44

LEATHER PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE E.E.C. (EXCLUDING INTRA-TRADE)[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, LEATHER PRODUCTS	1.5	1.6	1.3	0.8	0.5	0.5	0.5	0.4	0.3	0.3	0.3
Leather	1.7	2.1	1.8	1.1	0.7	0.5	0.7	0.4	0.5	0.3	0.4
Manufactures of leather	2.8	3.1	1.2	1.1	1.0	2.8	0.3	0.2	0.3	0.2	0.2
Travel goods, handbags, etc.	3.6	2.8	2.0	1.4	0.8	1.2	1.4	1.6	0.7	0.3	0.1
Leather clothing	2.6	1.6	1.0	0.6	0.7	0.4	0.3	0.2	0.2	0.5	0.3
Footwear with leather soles	0.3	0.2	0.2	0.2	0.2	0.1	0.1	0.2	0.2	0.2	0.3
Footwear with soles of wood or cork	-	1.3	-	-	-	-	-	-	-	-	-
Footwear with soles of other materials	..	-	-	-	-	-	..	-	..	..	-

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1 For source and notes see Table 2.8.

TABLE 11.45

TEXTILE INDUSTRIES: TRADE MEASURES, 1967 TO 1978

YEAR	DOMESTIC EXPORTS	ADJUSTED IMPORTS[1]	TRADE BALANCE	TRADE TURNOVER (EXPORTS + IMPORTS)	CANADIAN FACTORY SHIPMENTS	CANADIAN MARKET[2]	TRADE BALANCE / TRADE TURNOVER	SHIPMENTS / CANADIAN MARKET	EXPORT ORIENTATION	IMPORT PENETRATION
	(MILLIONS OF DOLLARS)						(PERCENT)			
1967	54	384	-331	438	1,363	1,694	-75.6	80.5	3.9	22.7
1968	69	401	-332	469	1,482	1,814	-70.8	81.7	4.6	22.1
1969	70	456	-386	527	1,635	2,020	-73.2	80.9	4.3	22.6
1970	79	443	-364	521	1,576	1,940	-69.8	81.2	5.0	22.8
1971	86	477	-391	562	1,698	2,089	-69.5	81.3	5.0	22.8
1972	88	615	-527	702	1,919	2,446	-75.0	78.5	4.6	25.1
1973	121	741	-620	862	2,103	2,803	-71.9	77.9	5.6	26.4
1974	153	911	-758	1,064	2,478	3,236	-71.3	76.6	6.2	28.2
1975	117	811	-694	928	2,439	3,133	-74.9	77.8	4.8	25.9
1976	134	963	-829	1,097	2,701	3,529	-75.5	76.5	5.0	27.3
1977	170	996	-826	1,166	2,924	3,750	-70.9	78.0	5.8	26.6
1978	215	1,183	-968	1,399	3,397	4,365	-69.2	77.8	6.3	27.1

[1]Total imports less re-exports; [2]Shipments plus imports less exports.

TABLE 11.46

TEXTILE INDUSTRIES: EXPORTS AND EXPORT ORIENTATION, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
					(MILLIONS OF DOLLARS)							
DOMESTIC EXPORTS												
TOTAL	54	69	70	79	86	88	121	153	117	134	170	215
COTTON YARN & CLOTH MILLS	12	17	13	15	16	18	26	22	15	15	12	10
WOOL YARN & CLOTH MILLS	6	8	9	11	9	10	12	15	13	11	15	19
MAN-MADE FIBRE, YARN & CLOTH MILLS	17	24	28	31	38	38	55	71	53	65	95	120
CORDAGE & TWINE INDUSTRY	6	3	3	3	2	1	1	3	2	1	2	2
FELT & FIBRE PROCESSING MILLS	1	1	1	1	0	0	1	1	1	2	2	2
FIBRE PROCESSING MILLS	1	1	1	1	0	0	0	1	0	1	1	0
PRESSED & PUNCHED FELT MILLS	0	0	0	0	0	0	0	0	0	0	1	1
CARPET, MAT & RUG INDUSTRY	4	3	3	3	3	3	5	7	8	11	14	30
COTTON & JUTE BAGS, CANVAS INDUSTRIES	1	1	1	0	1	1	1	1	1	1	0	1
MISC. TEXTILE INDUSTRIES	7	11	13	15	17	16	21	33	25	29	30	33
THREAD MILLS	0	0	0	0	0	0	0	0	0	0	0	0
NARROW FABRIC MILLS	0	1	1	1	1	1	1	1	1	1	1	1
EMBROIDERY, PLEATING, ETC. MFRS.	0	0	0	0	0	0	0	0	0	0	0	0
MISC. TEXTILE INDUSTRIES, N.E.S.	6	10	12	14	16	15	20	32	24	27	29	32
					(PERCENT)							
EXPORT ORIENTATION												
TOTAL	3.9	4.6	4.3	5.0	5.0	4.6	5.6	6.2	4.8	5.0	5.8	6.3
COTTON YARN & CLOTH MILLS	4.0	5.8	4.6	5.2	5.7	5.9	8.9	5.9	4.7	4.1	3.1	2.1
WOOL YARN & CLOTH MILLS	5.1	5.8	6.6	9.3	8.1	7.8	8.1	8.9	7.9	6.6	8.4	8.7
MAN-MADE FIBRE, YARN & CLOTH MILLS	4.1	5.4	5.5	6.4	7.6	6.9	8.2	9.7	7.4	8.7	10.9	12.0
CORDAGE & TWINE INDUSTRY	25.5	17.5	15.0	15.1	9.5	8.8	5.7	12.0	7.1	7.3	10.4	8.1
FELT & FIBRE PROCESSING MILLS	4.4	3.3	3.2	2.3	0.6	0.8	1.4	1.7	1.8	4.3	4.9	2.6
FIBRE PROCESSING MILLS	6.2	3.9	4.3	2.8	0.6	0.8	1.8	2.2	2.0	5.2	3.8	1.1
PRESSED & PUNCHED FELT MILLS	1.2	1.8	0.6	1.0	0.5	0.6	0.8	1.0	1.3	2.3	7.6	6.1
CARPET, MAT & RUG INDUSTRY	3.7	2.4	1.8	2.1	1.6	1.3	1.6	2.0	2.2	2.9	3.5	7.1
COTTON & JUTE BAGS, CANVAS INDUSTRIES	1.9	1.4	1.2	0.7	0.9	0.9	1.1	1.3	1.1	0.6	0.5	0.9
MISC. TEXTILE INDUSTRIES	3.0	4.4	4.1	5.2	5.3	4.4	5.2	6.9	5.0	4.9	4.8	4.6
THREAD MILLS	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
NARROW FABRIC MILLS	1.0	3.1	2.4	2.5	2.1	2.6	2.4	1.7	2.0	2.6	1.5	0.8
EMBROIDERY, PLEATING, ETC. MFRS.	0.9	1.0	0.6	0.3	0.3	0.5	0.0	0.0	0.0	0.0	0.0	0.0
MISC. TEXTILE INDUSTRIES, N.E.S.	4.9	7.0	7.8	8.9	9.3	7.4	8.2	11.2	7.6	7.2	7.4	7.1

TABLE 11.47

TEXTILE INDUSTRIES: SHIPMENTS AND IMPLICIT SELF-SUFFICIENCY[1], 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
	(MILLIONS OF DOLLARS)											
FACTORY SHIPMENTS												
TOTAL	1,363	1,482	1,635	1,576	1,698	1,919	2,183	2,478	2,439	2,701	2,924	3,397
COTTON YARN & CLOTH MILLS	297	297	290	283	282	310	287	370	319	364	385	478
WOOL YARN & CLOTH MILLS	121	130	132	122	118	129	152	165	160	170	174	220
MAN-MADE FIBRE, YARN & CLOTH MILLS	414	454	516	482	495	553	667	733	719	750	867	1,000
CORDAGE & TWINE INDUSTRY	22	18	17	17	16	15	14	22	25	18	18	20
FELT & FIBRE PROCESSING MILLS	27	29	33	30	31	33	37	42	34	39	44	63
FIBRE PROCESSING MILLS	18	21	23	22	20	21	23	26	23	27	32	44
PRESSED & PUNCHED FELT MILLS	10	8	10	8	11	12	14	16	11	12	12	19
CARPET, MAT & RUG INDUSTRY	108	136	164	160	188	241	302	348	356	384	399	419
COTTON & JUTE BAGS, CANVAS INDUSTRIES	59	56	60	62	62	65	79	88	92	91	93	98
MISC. TEXTILE INDUSTRIES	225	251	309	285	325	371	416	482	505	580	622	719
THREAD MILLS	18	19	21	21	22	25	27	29	28	34	44	58
NARROW FABRIC MILLS	38	43	36	33	37	41	44	51	50	55	60	67
EMBROIDERY, PLEATING, ETC. MFRS.	13	13	14	15	15	16	16	19	21	22	26	41
MISC. TEXTILE INDUSTRIES, N.E.S.	131	139	149	157	176	205	248	289	315	374	393	458
SHIPMENTS/CANADIAN MARKET	(PERCENT)											
TOTAL	80.5	81.7	80.9	81.2	81.3	78.5	77.9	76.6	77.8	76.5	78.0	77.8
COTTON YARN & CLOTH MILLS	78.6	82.9	79.8	82.3	78.1	73.4	73.2	71.9	73.0	67.6	70.0	72.2
WOOL YARN & CLOTH MILLS	77.4	77.9	78.4	82.0	86.5	83.3	78.1	84.1	83.1	79.6	77.8	76.3
MAN-MADE FIBRE, YARN & CLOTH MILLS	83.1	81.6	80.0	77.6	76.3	72.9	72.7	71.9	72.5	68.9	72.3	70.7
CORDAGE & TWINE INDUSTRY	67.5	63.9	63.9	58.1	49.6	45.3	33.9	22.5	31.0	41.8	35.6	36.5
FELT & FIBRE PROCESSING MILLS	49.4	51.0	55.8	59.8	64.5	58.7	52.0	58.5	55.3	53.0	53.4	58.7
FIBRE PROCESSING MILLS	38.9	43.8	47.2	52.5	54.6	40.5	40.5	47.5	46.1	44.0	45.4	50.1
PRESSED & PUNCHED FELT MILLS	94.8	92.7	92.2	93.6	94.0	93.8	93.6	94.0	94.7	96.1	96.9	99.1
CARPET, MAT & RUG INDUSTRY	89.3	88.3	87.4	89.9	90.2	88.3	87.2	86.6	86.3	87.1	89.7	94.2
COTTON & JUTE BAGS, CANVAS INDUSTRIES	99.6	99.3	99.2	98.2	97.9	93.7	95.0	92.5	95.5	94.2	93.3	93.1
MISC. TEXTILE INDUSTRIES	74.0	77.0	78.0	76.8	79.3	77.8	78.7	78.6	80.1	79.4	79.9	79.2
THREAD MILLS	86.3	84.8	86.6	87.3	87.1	88.0	87.8	84.3	84.8	87.2	89.4	89.0
NARROW FABRIC MILLS	80.6	83.5	76.5	74.5	76.4	76.7	76.2	76.5	77.0	78.2	76.8	74.6
EMBROIDERY, PLEATING, ETC. MFRS.	87.5	86.8	82.0	83.7	84.7	81.5	79.8	81.1	82.1	80.4	84.5	84.9
MISC. TEXTILE INDUSTRIES, N.E.S.	66.7	69.3	68.2	69.6	72.4	70.2	73.2	73.3	75.7	75.0	75.4	75.1

1 Ratio of shipments to Canadian market.

TABLE 11.48

TEXTILE INDUSTRIES: IMPORTS AND IMPORT PENETRATION, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
						(MILLIONS OF DOLLARS)						
ADJUSTED IMPORTS												
TOTAL	384	401	456	443	477	615	741	911	811	963	996	1,183
COTTON YARN & CLOTH MILLS	93	79	87	75	95	130	130	167	133	189	176	193
WOOL YARN & CLOTH MILLS	41	45	45	38	28	36	55	46	45	55	64	87
MAN-MADE FIBRE, YARN & CLOTH MILLS	101	127	157	170	191	243	305	358	327	403	427	534
CORDAGE & TWINE INDUSTRY	16	13	12	15	18	19	27	77	57	26	35	37
FELT & FIBRE PROCESSING MILLS	29	29	27	21	17	23	35	31	28	36	40	46
FIBRE PROCESSING MILLS	29	28	26	21	16	22	34	29	28	36	39	45
PRESSED & PUNCHED FELT MILLS	1	1	1	1	1	1	1	1	1	1	1	1
CARPET, MAT & RUG INDUSTRY	17	21	26	21	23	35	49	61	64	68	60	56
COTTON & JUTE BAGS, CANVAS INDUSTRIES	1	1	1	2	2	5	5	8	5	6	7	8
MISC. TEXTILE INDUSTRIES	86	86	100	101	102	122	134	164	151	179	186	222
THREAD MILLS	3	3	3	3	3	3	4	5	5	5	5	7
NARROW FABRIC MILLS	10	10	12	12	12	13	15	16	16	17	19	23
EMBROIDERY, PLEATING, ETC. MFRS.	2	2	3	3	3	4	4	5	5	5	5	7
MISC. TEXTILE INDUSTRIES, N.E.S.	72	71	81	82	83	102	111	138	125	152	157	184
IMPORT PENETRATION						(PERCENT)						
TOTAL	22.7	22.1	22.6	22.8	22.8	25.1	26.4	28.2	25.9	27.3	26.6	27.1
COTTON YARN & CLOTH MILLS	24.5	21.9	23.9	22.0	26.3	30.9	33.3	32.4	30.4	35.2	32.1	29.2
WOOL YARN & CLOTH MILLS	26.6	26.6	26.8	25.6	20.5	23.2	28.2	23.4	23.4	25.7	28.7	30.3
MAN-MADE FIBRE, YARN & CLOTH MILLS	20.2	22.8	24.4	27.4	29.5	32.1	33.2	35.1	32.9	37.1	35.6	37.7
CORDAGE & TWINE INDUSTRY	49.7	47.3	45.7	50.6	55.2	58.7	68.1	80.2	71.1	61.3	68.1	66.5
FELT & FIBRE PROCESSING MILLS	52.8	50.7	46.0	41.6	35.9	41.7	48.8	42.5	45.7	49.2	49.2	42.8
FIBRE PROCESSING MILLS	63.5	57.9	54.8	48.9	45.7	51.9	60.3	53.5	54.8	58.3	56.3	50.5
PRESSED & PUNCHED FELT MILLS	6.3	8.9	8.3	7.3	6.4	6.8	7.1	6.9	6.6	6.1	10.5	7.0
CARPET, MAT & RUG INDUSTRY	14.0	13.8	14.2	12.0	11.3	12.8	14.2	15.2	15.6	15.3	13.4	12.5
COTTON & JUTE BAGS, CANVAS INDUSTRIES	2.3	2.1	2.0	2.6	2.9	7.1	6.1	8.7	5.5	6.3	7.1	7.7
MISC. TEXTILE INDUSTRIES	28.3	26.4	25.2	27.2	24.9	25.6	25.4	26.8	23.9	24.5	23.9	24.5
THREAD MILLS	13.7	15.2	13.4	12.7	12.9	12.0	12.2	15.7	15.2	12.8	10.6	11.0
NARROW FABRIC MILLS	20.2	19.1	25.3	27.3	25.2	25.3	25.6	24.8	24.5	23.8	24.4	26.0
EMBROIDERY, PLEATING, ETC. MFRS.	13.3	14.1	18.5	16.6	15.6	18.9	20.2	18.9	17.9	19.6	15.5	15.1
MISC. TEXTILE INDUSTRIES, N.E.S.	36.5	35.5	37.1	36.6	34.3	35.0	32.8	34.9	30.1	30.4	30.2	30.2

TABLE 11.49

TEXTILE PRODUCTS: OECD IMPORTS BY SOURCE[1]

DISTRIBUTION AND AVERAGE ANNUAL RATE OF CHANGE

	DISTRIBUTION percent											Percent Change
	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1967-1977
Total Imports	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	
Developed Market Economies												
West Germany	9.3	10.3	11.2	12.5	13.7	12.5	12.9	13.3	13.4	13.1	12.9	3.3
France	7.2	7.4	7.4	8.0	8.3	8.4	8.5	8.1	8.4	7.9	8.4	1.6
Italy	6.4	6.9	7.0	6.6	7.0	7.3	6.6	6.7	8.0	7.3	8.2	2.5
Belgium-Luxembourg	8.0	8.4	8.7	8.7	8.2	8.4	7.6	7.9	8.6	8.2	7.9	- 0.1
United Kingdom	8.0	7.8	7.8	8.1	7.8	6.9	6.6	6.8	6.4	6.5	6.7	- 1.8
United States	5.3	5.0	5.0	5.0	5.0	5.3	5.4	6.8	6.7	6.5	5.8	0.9
Netherlands	5.5	5.9	6.3	6.2	6.6	6.1	5.7	5.7	6.0	5.5	5.3	- 0.4
Australia	9.3	8.0	7.6	6.3	4.5	5.3	6.5	4.4	4.0	4.9	3.9	- 8.3
Japan	5.7	6.0	6.0	5.9	6.4	5.5	3.6	3.6	3.7	3.6	3.7	- 4.2
Switzerland	3.0	3.1	3.3	3.4	3.4	3.2	3.0	3.1	3.3	3.1	3.2	- 0.6
Canada	0.6	0.7	0.6	0.7	0.7	0.6	0.5	0.6	0.5	0.4	0.4	- 4.0
Total EEC (9)	45.7	48.2	49.7	51.5	53.3	51.2	49.6	50.2	52.8	50.2	51.3	1.2
Other Developed Market Economies	10.1	10.2	10.2	9.9	9.6	10.3	10.4	10.0	9.9	10.1	10.2	0.1
OPEC	1.2	1.2	1.2	1.2	1.4	1.5	1.5	1.2	1.3	1.3	1.3	0.8
Other Developing Market Economies	15.2	13.9	12.7	12.4	11.3	12.4	14.1	15.4	13.2	15.1	15.2	0.[illegible]
Centrally Planned Economies	4.0	3.7	3.8	3.6	4.4	4.6	5.3	4.6	4.7	4.8	5.0	2.3
ADDENDUM												
Total Imports in Millions of U.S. Dollars	8,381	9,173	10,571	11,031	12,188	15,093	21,650	23,865	21,423	25,449	27,141	

TABLE 11.50

TEXTILE PRODUCTS: PERCENTAGE OF CANADA'S EXPORTS BY DESTINATION[2]

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	OECD Share 1977
O.E.C.D.	83.5	86.1	84.2	81.6	83.1	79.2	81.4	83.2	81.6	80.1	68.0	100.0
United States	39.7	35.4	31.3	35.9	36.8	33.9	36.0	38.2	33.3	33.8	33.6	49.4
Japan	1.1	0.9	1.1	1.2	1.1	0.9	1.9	1.5	0.9	0.7	0.7	1.0
E.E.C. (9)	29.3	35.9	37.7	31.2	33.9	27.2	25.3	25.5	31.5	27.0	17.0	25.0
United Kingdom	23.3	28.7	26.0	22.3	24.1	16.2	12.0	13.4	14.2	12.9	8.1	11.9
Rest of World	16.5	13.9	15.8	18.4	16.9	20.8	18.6	16.8	18.4	19.9	32.0	

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1 For source and notes see Table 2.6.

2 For source and notes see Table 2.7.

TABLE 11.51

TEXTILE PRODUCTS: GROWTH OF FOREIGN IMPORTS[1]

(percent)

	OECD	U.S.A.	JAPAN	EEC (9)*	OTHER OECD	DEVELOPING COUNTRIES**
1967	-	-	-	-	-	-
1968	9.5	18.2	3.6	3.3	10.7	11.7
1969	15.2	- 0.8	14.7	14.8	19.3	10.7
1970	4.4	4.7	8.2	1.6	6.4	4.5
1971	10.5	16.3	- 2.1	4.0	12.9	2.5
1972	23.8	10.8	59.3	31.2	21.2	18.6
1973	43.4	5.8	133.5	44.1	38.8	39.0
1974	10.2	1.4	-30.6	14.0	18.5	25.7
1975	-10.2	-24.3	-19.9	-8.2	- 8.1	-3.5
1976	18.8	34.4	21.9	27.9	13.7	10.8
1977	6.6	7.2	- 2.8	7.8	7.2	19.4

TABLE 11.52

TEXTILE PRODUCTS: CANADA'S TRADE SHARE BY MARKET[1]

(percent)

1967	0.6	1.9	0.1	0.9	0.2	0.4
1968	0.7	2.0	0.1	1.2	0.2	0.4
1969	0.6	1.7	0.1	1.2	0.2	0.4
1970	0.7	2.3	0.2	1.3	0.2	0.6
1971	0.7	2.5	0.1	1.5	0.2	0.6
1972	0.6	2.5	0.1	0.9	0.2	0.7
1973	0.5	2.7	0.1	0.8	0.2	0.7
1974	0.6	3.1	0.2	0.9	0.2	0.6
1975	0.5	2.3	0.1	0.9	0.2	0.5
1976	0.4	2.1	0.1	0.6	0.2	0.6
1977	0.4	2.7	0.1	0.5	0.2	0.7

[1] For source and notes see Table 2.8.

TABLE 11.53

TEXTILE PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE OECD[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
	Total OECD Imports	Imports from Canada	Total OECD Imports 1967	Total OECD Imports 1977	Imports from Canada 1967	Imports from Canada 1977
TOTAL, TEXTILE PRODUCTS	12.5	9.2	100.0	100.0	100.0	100.0
Silk	8.7	n.a.	1.4	1.0	..	..
Wool and other animal hair	6.1	- 0.2	21.0	11.8	4.5	1.8
Jute	- 7.7	-20.8	2.3	0.3	0.6	..
Vegetable fibres, except cotton and jute	4.9	3.9	2.3	1.1	..	..
Synthetic and regenerated fibres	13.1	12.7	4.8	5.0	5.7	7.9
Waste materials from textile fabrics	6.9	3.5	1.1	0.7	3.3	1.9
Textile yarn and thread	15.3	12.6	15.7	20.1	10.3	14.1
Cotton fabrics	15.0	0.1	10.2	12.8	19.7	8.2
Textile fabrics	12.4	13.6	23.4	23.2	14.5	21.6
Tulle, lace, embroidery, ribbons, etc.	10.0	26.0	2.1	1.7	0.6	2.5
Special textile fabrics	15.6	9.3	5.9	7.7	26.5	26.8
Made-up articles	15.5	7.1	4.3	5.6	6.5	5.4
Carpets, carpeting and rugs, knotted	18.8	36.5	1.7	2.9	0.1	1.0
Other carpets, carpeting and rugs	17.8	10.5	3.5	5.6	7.7	8.7
Tapestries	16.0	23.0	..	0.1	..	0.1
Mats, matting, screens, etc.	20.2	n.a.	0.2	0.3	-	[illegible]

TABLE 11.54

TEXTILE PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE OECD[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, TEXTILE PRODUCTS	0.6	0.7	0.6	0.7	0.7	0.6	0.5	0.6	0.5	0.4	0.4
Silk	..	-	..	-	-	-	-	-	-	-	-
Wool and other animal hair	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Jute	0.2	..	..	-	..	..	..	..	..	-	..
Vegetable fibres, except cotton and jute	..	-	..	..	..	..	..	..	..	..	..
Synthetic and regenerated fibres	0.7	1.1	0.9	0.8	1.0	0.8	0.8	1.1	0.5	0.7	0.7
Waste materials from textile fabrics	1.7	1.8	2.0	1.6	1.1	1.3	1.2	1.3	1.1	1.3	1.2
Textile yarn and thread	0.4	0.6	0.6	0.6	0.6	0.3	0.3	0.3	0.3	0.2	0.3
Cotton fabrics	1.1	1.6	1.1	1.1	1.1	0.9	0.7	0.6	0.5	0.4	0.3
Textile fabrics	0.4	0.4	0.4	0.3	0.5	0.5	0.5	0.6	0.6	0.5	0.4
Tulle, lace, embroidery, ribbons, etc.	0.2	0.3	0.2	0.2	0.4	0.6	0.4	0.6	0.7	0.4	0.6
Special textile fabrics	2.6	2.2	2.1	3.0	2.8	3.0	2.1	1.7	1.2	1.4	1.5
Made-up articles	0.9	0.7	0.6	0.7	0.6	0.3	0.4	0.5	0.4	0.4	0.4
Carpets, carpeting and rugs, knotted	..	0.1	..	..	..	..	..	..	..	0.1	0.2
Other carpets, carpeting and rugs	1.3	1.3	0.9	0.9	0.6	0.4	0.8	0.6	0.6	0.6	0.7
Tapestries	0.3	0.7	0.7	0.4	0.9	1.9	1.3	0.3	0.3	0.4	0.5
Mats, matting, screens, etc.	-	-	-	-	..	-	-	-	..	..	..

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1 For source and notes see Table 2.8.

TABLE 11.55

TEXTILE PRODUCTS: COMMODITY IMPORTS GROWTH AND DISTRIBUTION IN THE U.S.A.[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
	Total U.S.A. Imports	Imports from Canada	Total U.S.A. Imports 1967	Total U.S.A. Imports 1977	Imports from Canada 1967	Imports from Canada 1977
TOTAL, TEXTILE PRODUCTS	6.3	10.2	100.0	100.0	100.0	100.0
Silk	-14.4	n.a.	1.7	0.2	..	..
Wool and other animal hair	- 3.3	- 6.3	15.6	6.0	7.7	1.5
Jute	-10.1	-20.8	0.8	0.1	1.4	0.1
Vegetable fibres, except cotton and jute	2.4	-10.4	1.6	1.1	..	..
Synthetic and regenerated fibres	2.2	16.1	4.5	3.0	6.5	10.9
Waste materials from textile fabrics	- 2.8	2.2	0.8	0.3	3.2	1.5
Textile yarn and thread	10.9	13.6	7.6	11.6	12.8	17.4
Cotton fabrics	9.7	18.0	13.1	17.7	3.7	7.3
Textile fabrics	4.0	4.6	37.3	29.9	13.6	8.0
Tulle, lace, embroidery, ribbons, etc.	4.5	34.6	1.8	1.5	0.5	3.4
Special textile fabrics	12.8	11.3	6.3	11.3	34.2	37.5
Made-up articles	13.9	9.9	4.5	9.0	6.3	6.1
Carpets, carpeting and rugs, knotted	15.4	59.7	1.7	3.8	..	2.0
Other carpets, carpeting and rugs	10.3	0.9	2.6	3.7	10.0	4.1
Tapestries	9.6	18.8	0.1	0.2	..	0.1
Mats, matting, screens, etc.	17.4	-	0.2	0.6	-	-

TABLE 11.56

TEXTILE PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE UNITED STATES[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, TEXTILE PRODUCTS	1.9	2.0	1.7	2.3	2.5	2.5	2.7	3.1	2.3	2.1	2.7
Silk	..	-	-	-	-	-	-	-	-	-	-
Wool and other animal hair	0.9	0.6	0.8	0.8	0.7	0.3	0.3	0.3	0.2	0.3	0.7
Jute	3.3	0.7	0.3	-	1.4	0.6	0.5	0.2	..	-	0.9
Vegetable fibres, except cotton and jute	..	-	0.2	0.2	0.5	0.2	0.2	0.1	0.1	0.1	..
Synthetic and regenerated fibres	2.7	2.2	3.1	5.3	7.8	7.5	10.4	16.9	10.4	11.2	9.7
Waste materials from textile fabrics	0.8	9.7	9.5	7.7	8.1	9.4	11.3	16.1	17.7	15.5	13.1
Textile yarn and thread	3.2	2.8	2.4	2.4	1.7	1.4	1.5	2.2	2.6	2.1	4.0
Cotton fabrics	0.5	1.4	0.3	0.4	0.8	0.6	0.9	0.7	1.5	1.1	1.1
Textile fabrics	0.7	1.0	0.9	0.5	0.9	1.3	1.4	2.0	0.9	0.4	0.7
Tulle, lace, embroidery, ribbons, etc.	0.5	1.0	0.8	0.9	1.6	2.6	3.5	6.0	6.4	6.3	6.2
Special textile fabrics	10.2	8.8	9.0	15.3	15.6	17.0	12.1	7.1	5.4	7.3	8.9
Made-up articles	2.6	1.3	1.1	0.8	1.0	0.8	1.3	1.5	1.6	1.2	1.8
Carpets, carpeting and rugs, knotted	0.1	0.3	0.2	0.3	0.3	0.2	0.3	0.3	0.5	1.4	1.4
Other carpets, carpeting and rugs	7.2	8.4	5.3	9.2	5.6	1.9	7.0	2.6	2.4	1.2	2.9
Tapestries	0.7	1.0	0.2	-	1.9	1.1	1.5	0.8	0.5	1.2	1.5
Mats, matting, screens, etc.	-	-	-	-	-	-	-	-	..	0.1	-

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1 For source and notes see Table 2.8.

TABLE 11.57

TEXTILE PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE E.E.C.[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
			Total E.E.C. Imports		Imports from Canada	
	Total E.E.C. Imports	Imports from Canada	1967	1977	1967	1977
TOTAL, TEXTILE PRODUCTS	12.7	4.7	100.0	100.0	100.0	100.0
Silk	7.2	-	2.5	1.5	-	-
Wool and other animal hair	5.2	3.9	40.3	20.4	2.3	2.1
Jute	- 8.0	-	6.1	0.8	-	-
Vegetable fibres, except cotton and jute	1.9	-	3.8	1.4	-	-
Synthetic and regenerated fibres	14.8	8.8	2.7	3.3	0.8	1.2
Waste materials from textile fabrics	5.4	4.9	1.3	0.6	2.5	2.6
Textile yarn and thread	22.4	15.3	7.7	17.6	2.9	7.5
Cotton fabrics	17.5	-11.0	10.8	16.5	43.9	8.6
Textile fabrics	17.2	16.2	9.3	13.8	19.5	55.2
Tulle, lace, embroidery, ribbons, etc.	13.2	39.6	2.0	2.1	0.1	2.0
Special textile fabrics	18.1	1.6	2.7	4.4	19.2	14.1
Made-up articles	16.4	- 1.9	4.6	6.4	6.6	3.4
Carpets, carpeting and rugs, knotted	20.2	8.6	4.7	9.0	0.2	0.3
Other carpets, carpeting and rugs	16.1	8.3	1.1	1.5	2.0	2.8
Tapestries	14.4	n.a.	..	0.1	-	0.1
Mats, matting, screens, etc.	23.2	n.a.	0.2	0.5	-	..

TABLE 11.58

TEXTILE PRODUCTS: CANADA'S SHARE OF IMPORTS BY E.E.C. (EXCLUDING INTRA-TRADE)[1]
(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, TEXTILE PRODUCTS	0.9	1.2	1.2	1.3	1.5	0.9	0.8	0.9	0.9	0.6	0.5
Silk	-	-	..	-	-	-	-	-	-	-	-
Wool and other animal hair	0.1	0.1	0.1	..	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Jute	-	..	-	-	..	-	-	-	-	-	-
Vegetable fibres, except cotton and jute	-	-	-	-	-	-	-	..	..	..	-
Synthetic and regenerated fibres	0.3	1.3	1.6	0.8	0.5	0.4	0.5	1.1	0.2	0.2	0.2
Waste materials from textile fabrics	1.9	1.3	1.7	1.6	1.0	1.1	1.3	1.7	1.3	1.3	1.8
Textile yarn and thread	0.4	1.4	2.5	1.7	2.1	0.4	0.6	0.8	0.7	0.3	0.2
Cotton fabrics	3.8	5.0	3.6	3.3	3.4	2.2	1.5	1.0	0.9	0.3	0.2
Textile fabrics	1.9	1.9	1.6	2.0	2.6	2.0	1.9	2.3	3.0	2.4	1.8
Tulle, lace, embroidery, ribbons, etc.	0.1	0.1	0.1	0.2	0.3	0.9	0.4	0.4	0.8	0.4	0.4
Special textile fabrics	6.5	5.3	4.9	6.8	5.7	4.6	3.6	2.8	2.1	1.8	1.4
Made-up articles	1.3	1.4	1.2	1.5	1.4	0.4	0.5	0.5	0.4	0.3	0.2
Carpets, carpeting and rugs, knotted	..	0.1	..	..	..	..	..	..	..	..	..
Other carpets, carpeting and rugs	1.7	3.6	5.4	2.6	1.7	1.6	1.6	0.9	1.4	1.7	0.9
Tapestries	-	1.0	0.5	-	0.1	8.1	3.2	0.1	0.6	0.1	0.5
Mats, matting, screens, etc.	-	-	-	-	..	-	-	-	0.1	-	..

1 For source and notes see Table 2.8.

TABLE 11.59

KNITTING MILLS: TRADE MEASURES, 1967 TO 1978

YEAR	DOMESTIC EXPORTS	ADJUSTED IMPORTS[1]	TRADE BALANCE	TRADE TURNOVER (EXPORTS + IMPORTS)	CANADIAN FACTORY SHIPMENTS	CANADIAN MARKET[2]	TRADE BALANCE / TRADE TURNOVER	SHIPMENTS / CANADIAN MARKET	EXPORT ORIENTATION	IMPORT PENETRATION
	(MILLIONS OF DOLLARS)						(PERCENT)			
1967	6	43	-37	50	326	363	-75.0	89.7	1.9	12.0
1968	6	66	-60	71	377	437	-83.9	86.3	1.5	15.0
1969	10	88	-79	98	403	481	-80.2	83.7	2.4	18.4
1970	12	110	-98	122	415	513	-80.3	80.9	2.9	21.4
1971	11	167	-156	177	455	611	-88.0	74.5	2.3	27.3
1972	12	198	-186	209	470	656	-88.9	71.7	2.5	30.1
1973	13	188	-175	201	530	705	-87.3	75.2	2.4	26.6
1974	12	217	-205	230	601	806	-89.3	74.5	2.1	27.0
1975	9	275	-266	284	624	890	-93.6	70.1	1.5	30.9
1976	11	344	-333	355	631	964	-93.7	65.5	1.8	35.7
1977	10	310	-300	320	704	1,003	-93.8	70.1	1.4	30.8
1978	13	319	-306	332	885	1,191	-92.3	74.3	1.4	26.8

[1]Total imports less re-exports; [2]Shipments plus imports less exports.

TABLE 11.60

KNITTING MILLS: EXPORTS AND EXPORT ORIENTATION, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
	(MILLIONS OF DOLLARS)											
DOMESTIC EXPORTS												
TOTAL	6	6	10	12	11	12	13	12	9	11	10	13
HOSIERY MILLS	1	1	2	2	1	1	1	2	1	1	1	2
KNITTING MILLS (EXCL. HOSIERY)	5	5	7	10	10	11	11	10	8	10	9	11
EXPORT ORIENTATION	(PERCENT)											
TOTAL	1.9	1.5	2.4	2.9	2.3	2.5	2.4	2.1	1.5	1.8	1.4	1.4
HOSIERY MILLS	0.9	0.6	2.1	2.0	0.7	1.0	1.5	2.1	0.6	1.0	1.0	1.1
KNITTING MILLS (EXCL. HOSIERY)	2.3	1.9	2.5	3.2	2.8	2.8	2.6	2.1	1.6	1.9	1.5	1.5

TABLE 11.61

KNITTING MILLS: SHIPMENTS AND IMPLICIT SELF-SUFFICIENCY[1], 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
						(MILLIONS OF DOLLARS)						
FACTORY SHIPMENTS												
TOTAL	326	377	403	415	455	470	530	601	624	631	704	885
HOSIERY MILLS	88	105	110	112	103	91	95	96	104	109	119	148
KNITTING MILLS (EXCL. HOSIERY)	237	272	293	302	351	379	436	504	521	522	585	737
SHIPMENTS/CANADIAN MARKET						(PERCENT)						
TOTAL	89.7	86.3	83.7	80.9	74.5	71.7	75.2	74.5	70.1	65.5	70.1	74.3
HOSIERY MILLS	98.4	97.4	95.5	97.9	97.5	97.1	97.2	96.1	90.1	88.6	87.5	90.0
KNITTING MILLS (EXCL. HOSIERY)	86.9	82.7	79.9	76.0	69.7	67.4	71.6	71.5	67.2	62.1	67.4	71.8

TABLE 11.62

KNITTING MILLS: IMPORTS AND IMPORT PENETRATION, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
						(MILLIONS OF DOLLARS)						
ADJUSTED IMPORTS												
TOTAL	43	66	88	110	167	198	188	217	275	344	310	319
HOSIERY MILLS	2	3	7	5	3	4	4	6	12	15	18	18
KNITTING MILLS (EXCL. HOSIERY)	41	62	81	105	163	194	184	212	263	329	291	301
IMPORT PENETRATION						(PERCENT)						
TOTAL	12.0	15.0	18.4	21.4	27.3	30.1	26.6	27.0	30.9	35.7	30.8	26.8
HOSIERY MILLS	2.5	3.2	6.5	4.1	3.2	3.8	4.3	5.9	10.5	12.3	13.4	11.1
KNITTING MILLS (EXCL. HOSIERY)	15.1	18.9	22.1	26.5	32.3	34.5	30.2	30.0	33.9	39.1	33.6	29.3

[1] Ratio of shipments to Canadian market

TABLE 11.63

KNITTING MILL PRODUCTS: OECD IMPORTS BY SOURCE[1]

DISTRIBUTION AND AVERAGE ANNUAL RATE OF CHANGE

	DISTRIBUTION percent											Percent Change
	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1967-1977
Total Imports	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	
Developed Market Economies												
Italy	29.7	29.9	29.4	26.8	24.6	23.2	20.4	19.6	20.9	19.3	19.9	- 3.9
West Germany	7.1	7.6	7.5	7.8	7.1	6.2	6.0	6.0	6.0	6.3	6.8	- 0.4
France	7.3	6.6	6.1	6.8	7.1	7.1	7.0	6.6	6.9	5.6	5.4	- 3.0
United Kingdom	6.2	6.0	6.6	6.5	5.1	4.5	4.3	4.4	4.0	4.0	4.8	- 2.5
Greece	0.1	0.1	0.2	0.2	0.3	0.4	0.9	1.4	1.9	2.5	2.5	38.0
Japan	5.2	4.3	4.4	3.8	4.1	3.9	2.8	2.0	1.6	1.7	1.8	-10.1
Netherlands	1.9	2.0	2.1	2.6	2.5	2.5	2.6	2.3	2.2	1.7	1.5	- 2.3
Belgium-Luxembourg	4.9	4.2	3.8	3.6	2.5	2.7	2.3	2.2	1.9	1.6	1.3	-12.4
United States	1.4	1.0	0.8	0.7	0.6	0.6	0.6	0.9	1.0	1.1	1.2	- 1.5
Canada	0.4	0.3	0.3	0.4	0.3	0.2	0.2	0.2	0.1	0.1	0.1	-12.9
Total EEC (9)	60.3	59.5	58.7	57.3	52.0	48.9	44.9	43.6	44.2	40.6	41.9	- 3.6
Other Developed Market Economies	9.9	9.4	9.7	10.3	10.7	10.3	10.2	10.6	10.5	9.5	9.7	- 0.2
OPEC	..	..	..	0.1	0.1	0.1	0.1	..	..	..	..	..
Other Developing Market Economies	20.3	22.8	23.5	24.7	20.3	32.1	36.6	37.1	37.0	40.5	39.0	6.8
Hong Kong	14.2	14.5	13.8	13.3	13.6	13.1	12.5	11.8	13.1	13.9	13.2	- 0.7
Taiwan	1.6	2.9	3.8	5.9	..	9.5	10.8	10.9	9.7	9.8	9.8	19.6
S. Korea	2.3	4.0	4.2	4.0	4.8	6.4	7.8	8.4	8.1	9.6	9.0	12.4
Centrally Planned Economies	2.3	2.6	2.2	2.4	11.8	3.5	3.7	4.1	3.7	3.9	3.9	5.4
ADDENDUM												
Total Imports in Millions of U.S. Dollars	1,106	1,350	1,790	2,122	2,660	3,431	4,342	4,959	5,466	6,573	7,296	

TABLE 11.64

KNITTING MILL PRODUCTS: PERCENTAGE OF CANADA'S EXPORTS BY DESTINATION[2]

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	OECD Share 1977
O.E.C.D.	77.3	79.4	84.1	84.8	82.2	76.0	66.0	69.8	67.1	62.9	68.0	100.0
United States	61.7	64.9	72.8	72.1	66.5	66.1	52.9	51.5	44.0	40.2	50.6	74.4
Japan	..	..	0.1	0.1	0.1	0.2	0.4	1.7	0.8	0.3	0.9	1.3
E.E.C. (9)	8.0	8.7	9.4	10.2	12.7	7.7	8.4	6.9	19.4	14.7	8.2	12.1
United Kingdom	3.8	4.2	5.8	7.1	3.7	2.6	2.6	2.7	7.8	8.3	2.8	4.1
Rest of World	22.7	20.6	15.9	15.2	17.8	24.0	34.0	30.2	32.9	37.1	32.0	

1 For source and notes see Table 2.6.

2 For source and notes See Table 2.7.

TABLE 11.65

KNITTING MILL PRODUCTS; GROWTH OF FOREIGN IMPORTS[1]

(percent)

	OECD	U.S.A.	JAPAN	EEC (9)*	OTHER OECD	DEVELOPING COUNTRIES**
1967	-	-	-	-	-	-
1968	22.1	35.1	75.0	12.5	18.4	8.7
1969	32.6	22.7	64.3	33.9	36.3	-0.9
1970	18.5	8.7	143.5	22.3	19.2	5.2
1971	25.4	39.8	46.4	35.4	16.9	24.3
1972	29.0	37.4	18.3	39.3	23.2	4.5
1973	26.6	17.0	213.4	43.6	16.9	13.3
1974	14.2	..	16.8	25.1	17.2	30.4
1975	10.2	2.5	-34.1	26.5	13.7	5.4
1976	20.3	26.8	41.9	25.4	13.8	16.5
1977	11.0	9.3	4.5	12.4	11.7	38.2

TABLE 11.66

KNITTING MILL PRODUCTS: CANADA'S TRADE SHARE BY MARKET[1]

(percent)

1967	0.3	0.9	..	0.4	0.1	1.7
1968	0.3	0.7	..	0.4	0.1	1.1
1969	0.3	1.1	..	0.4	..	1.1
1970	0.4	1.4	..	0.4	..	1.0
1971	0.3	1.1	..	0.2	..	0.8
1972	0.2	0.7	..	0.1	..	0.8
1973	0.2	0.5	..	0.1	..	0.7
1974	0.2	0.4	..	0.2	0.1	0.5
1975	0.1	0.2	..	0.2	..	0.5
1976	0.1	0.2	..	0.2	..	0.4
1977	0.1	0.2	..	0.1	..	0.3

1 For source and notes see Table 2.8.

TABLE 11.67

KNITTING MILL PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE OECD[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
	Total OECD Imports	Imports from Canada	Total OECD Imports 1967	Total OECD Imports 1977	Imports from Canada 1967	Imports from Canada 1977
TOTAL, KNITTING MILLS PRODUCTS	20.8	6.0	100.0	100.0	100.0	100.0
Clothing and accessories, knitted or crocheted	20.8	6.0	100.0	100.0	100.0	100.0

TABLE 11.68

KNITTING MILL PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE OECD[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, KNITTING MILLS PRODUCTS	0.3	0.3	0.3	0.4	0.3	0.2	0.2	0.2	0.1	0.1	0.1
Clothing and accessories, knitted or crocheted	0.3	0.3	0.3	0.4	0.3	0.2	0.2	0.2	0.1	0.1	0.1

TABLE 11.69

KNITTING MILL PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE U.S.A.[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
	Total U.S.A. Imports	Imports from Canada	Total U.S.A. Imports 1967	Total U.S.A. Imports 1977	Imports from Canada 1967	Imports from Canada 1977
TOTAL, KNITTING MILLS PRODUCTS	19.1	3.0	100.0	100.0	100.0	100.0
Clothing and accessories, knitted or crocheted	19.1	3.0	100.0	100.0	100.0	100.0

TABLE 11.70

KNITTING MILL PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE U.S.A.[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, KNITTING MILLS PRODUCTS	0.9	0.7	1.1	1.4	1.1	0.7	0.5	0.4	0.2	0.2	0.2
Clothing and accessories, knitted or crocheted	0.9	0.7	1.1	1.4	1.1	0.7	0.5	0.4	0.2	0.2	0.2

1 For source and notes see Table 2.8.

TABLE 11.71

KNITTING MILL PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE E.E.C.[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
			Total E.E.C. Imports		Imports from Canada	
	Total E.E.C. Imports	Imports from Canada	1967	1977	1967	1977
TOTAL, KNITTING MILLS PRODUCTS	27.3	13.9	100.0	100.0	100.0	100.0
Clothing and accessories, knitted or crocheted	27.3	13.9	100.0	100.0	100.0	100.0

TABLE 11.72

KNITTING MILL PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE E.E.C. (EXCLUDING INTRA-TRADE)[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, KNITTING MILLS PRODUCTS	0.4	0.4	0.4	0.4	0.2	0.1	0.1	0.2	0.2	0.2	0.1
Clothing and accessories, knitted or crocheted	0.4	0.4	0.4	0.4	0.2	0.1	0.1	0.2	0.2	0.2	0.1

1 For source and notes see Table 2.8.

TABLE 11.73

CLOTHING INDUSTRIES: TRADE MEASURES, 1967 TO 1978

YEAR	DOMESTIC EXPORTS	ADJUSTED IMPORTS[1]	TRADE BALANCE	TRADE TURNOVER (EXPORTS + IMPORTS)	CANADIAN FACTORY SHIPMENTS	CANADIAN MARKET[2]	TRADE BALANCE / TRADE TURNOVER	SHIPMENTS / CANADIAN MARKET	EXPORT ORIENTATION	IMPORT PENETRATION
	(MILLIONS OF DOLLARS)						(PERCENT)			
1967	25	66	-41	91	1,177	1,217	-44.7	96.7	2.1	5.4
1968	37	86	-49	123	1,258	1,308	-40.3	96.2	2.9	6.6
1969	58	98	-40	156	1,332	1,372	-26.0	97.1	4.3	7.2
1970	65	95	-30	161	1,371	1,401	-18.5	97.9	4.8	6.8
1971	75	105	-29	180	1,488	1,517	-16.1	98.1	5.1	6.9
1972	85	130	-45	215	1,645	1,690	-20.8	97.4	5.2	7.7
1973	110	164	-54	274	1,838	1,891	-19.7	97.2	6.0	8.7
1974	117	211	-94	328	2,077	2,171	-28.7	95.7	5.6	9.7
1975	101	241	-140	342	2,307	2,447	-41.0	94.3	4.4	9.9
1976	102	398	-297	500	2,570	2,867	-59.4	89.7	4.0	13.9
1977	118	340	-222	457	2,776	2,998	-48.6	92.6	4.2	11.3
1978	142	358	-217	500	3,523	3,739	-43.3	94.2	4.0	9.6

[1] Total imports less re-exports; [2] Shipments plus imports less exports.

TABLE 11.74

CLOTHING INDUSTRIES: EXPORTS AND EXPORT ORIENTATION, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
						(MILLIONS OF DOLLARS)						
DOMESTIC EXPORTS												
TOTAL	25	37	58	65	75	85	110	117	101	102	118	142
MEN'S WOMEN'S CHILDREN'S CLOTHING IND.	10	15	26	37	49	55	69	69	56	51	59	59
FUR GOODS INDUSTRY	10	15	22	19	17	20	30	35	37	41	48	72
FOUNDATION GARMENT INDUSTRY	1	1	1	1	1	1	1	1	1	1	1	0
MISC. CLOTHING INDUSTRIES N.E.S.	4	6	9	8	8	9	10	12	8	10	10	11
FABRIC GLOVE MFRS.	1	1	2	1	1	1	0	0	0	0	0	0
HAT & CAP INDUSTRY	0	1	1	1	2	1	1	1	1	1	1	1
MISC. CLOTHING IND., N.E.S.	2	4	6	6	6	8	9	11	6	8	9	9
EXPORT ORIENTATION						(PERCENT)						
TOTAL	2.1	2.9	4.3	4.8	5.1	5.2	6.0	5.6	4.4	4.0	4.2	4.0
MEN'S WOMEN'S CHILDREN'S CLOTHING IND.	1.0	1.4	2.3	3.1	3.7	3.8	4.3	3.8	2.7	2.2	2.4	1.9
FUR GOODS INDUSTRY	15.2	22.2	28.1	28.7	25.0	24.7	29.2	28.7	25.9	24.8	28.5	35.5
FOUNDATION GARMENT INDUSTRY	1.4	1.1	1.4	1.3	1.1	0.9	1.0	1.0	0.7	0.9	0.7	0.6
MISC. CLOTHING INDUSTRIES N.E.S.	9.1	13.4	22.4	21.3	21.7	21.9	21.3	21.8	13.5	15.0	15.7	11.3
FABRIC GLOVE MFRS.	18.2	20.5	29.3	20.1	18.6	16.2	5.4	2.5	3.4	1.7	2.9	2.3
HAT & CAP INDUSTRY	1.6	2.6	3.4	3.6	9.6	3.8	6.0	6.3	5.1	6.1	5.0	3.7
MISC. CLOTHING IND., N.E.S.	19.7	32.7	57.0	47.4	35.2	40.9	40.9	44.8	26.4	28.2	32.6	22.2

TABLE 11.75

CLOTHING INDUSTRIES: SHIPMENTS AND IMPLICIT SELF-SUFFICIENCY[1], 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
	(MILLIONS OF DOLLARS)											
FACTORY SHIPMENTS												
TOTAL	1,177	1,258	1,332	1,371	1,488	1,645	1,838	2,077	2,307	2,570	2,776	3,523
MEN'S WOMEN'S CHILDREN'S CLOTHING IND.	1,007	1,084	1,156	1,211	1,322	1,462	1,625	1,837	2,037	2,268	2,466	3,142
FUR GOODS INDUSTRY	67	70	77	68	70	82	102	122	141	164	168	203
FOUNDATION GARMENT INDUSTRY.	59	62	58	56	58	58	62	62	69	74	75	81
MISC. CLOTHING INDUSTRIES N.E.S.	44	43	40	37	38	43	49	56	59	64	67	97
FABRIC GLOVE MFRS.	7	7	7	6	6	7	8	11	11	12	13	17
HAT & CAP INDUSTRY	25	25	23	18	16	17	19	21	24	24	27	39
MISC. CLOTHING IND., N.E.S.	12	11	11	12	16	19	22	24	24	28	27	41
	(PERCENT)											
SHIPMENTS/CANADIAN MARKET												
TOTAL	96.7	96.2	97.1	97.9	98.1	97.4	97.2	95.7	94.3	89.7	92.6	94.2
MEN'S WOMEN'S CHILDREN'S CLOTHING IND.	95.6	94.7	95.2	96.4	96.9	96.2	95.7	94.2	92.8	88.0	91.3	92.7
FUR GOODS INDUSTRY	116.9	127.0	136.0	139.3	131.7	131.0	138.3	137.7	133.8	129.0	135.1	149.6
FOUNDATION GARMENT INDUSTRY.	100.0	99.3	98.8	99.7	99.2	98.2	97.2	97.6	96.6	95.5	95.3	95.5
MISC. CLOTHING INDUSTRIES N.E.S.	90.9	92.8	94.2	91.8	91.9	88.2	86.6	80.8	80.0	75.1	70.8	74.3
FABRIC GLOVE MFRS.	75.7	69.7	67.2	64.6	58.4	52.1	48.7	44.2	50.9	46.2	41.3	43.5
HAT & CAP INDUSTRY	87.3	87.6	82.2	78.6	83.0	75.8	75.7	73.4	72.0	63.0	62.5	68.2
MISC. CLOTHING IND., N.E.S.	114.6	139.7	203.2	170.2	139.6	151.2	152.4	157.5	126.9	130.1	135.1	120.3

1 Ratio of shipments to Canadian market.

TABLE 11.76

CLOTHING INDUSTRIES: IMPORTS AND IMPORT PENETRATION, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
						(MILLIONS OF DOLLARS)						
ADJUSTED IMPORTS												
TOTAL	66	86	98	95	105	130	164	211	241	398	340	358
MEN'S WOMEN'S CHILDREN'S CLOTHING IND.	56	75	84	83	91	113	142	182	214	359	293	305
FUR GOODS INDUSTRY	0	1	1	0	1	1	2	2	1	4	4	5
FOUNDATION GARMENT INDUSTRY	1	1	2	1	1	2	2	2	3	4	4	4
MISC. CLOTHING INDUSTRIES N.E.S.	8	9	11	11	12	15	18	25	23	31	38	44
FABRIC GLOVE MFRS.	4	4	5	5	6	8	9	15	11	14	19	23
HAT & CAP INDUSTRY	4	4	6	6	5	6	7	9	11	16	18	20
MISC. CLOTHING IND., N.E.S.	1	0	1	1	1	1	1	2	1	1	2	2
						(PERCENT)						
IMPORT PENETRATION												
TOTAL	5.4	6.6	7.2	6.8	6.9	7.7	8.7	9.7	9.9	13.9	11.3	9.6
MEN'S WOMEN'S CHILDREN'S CLOTHING IND.	5.3	6.6	6.9	6.6	6.7	7.4	8.4	9.3	9.8	13.9	10.9	9.0
FUR GOODS INDUSTRY	0.9	1.3	2.2	0.7	1.2	1.4	2.1	1.8	0.8	3.0	3.5	3.5
FOUNDATION GARMENT INDUSTRY	1.4	1.7	2.6	1.6	1.8	2.6	3.8	3.4	4.2	5.4	5.3	5.0
MISC. CLOTHING INDUSTRIES N.E.S.	17.4	19.7	26.9	27.7	28.0	31.1	31.8	36.8	30.8	36.2	40.3	34.0
FABRIC GLOVE MFRS.	38.0	44.6	52.5	48.4	52.5	56.4	53.9	56.9	50.9	54.6	59.9	57.5
HAT & CAP INDUSTRY	14.1	14.7	20.5	24.2	25.0	27.1	28.9	31.2	31.7	40.8	40.6	34.3
MISC. CLOTHING IND., N.E.S.	8.0	6.0	12.7	10.4	9.6	10.7	10.0	13.0	6.6	6.6	9.0	6.4

TABLE 11.77

CLOTHING: OECD IMPORTS BY SOURCE[1]

DISTRIBUTION AND AVERAGE ANNUAL RATE OF CHANGE

	DISTRIBUTION percent											Percent Change
	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1967-1977
Total Imports	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	
Developed Market Economies												
West Germany	9.8	9.5	9.0	8.3	8.8	8.7	8.9	7.9	8.4	8.3	8.7	- 1.2
Italy	8.3	8.0	9.0	8.2	7.2	7.0	6.4	6.4	7.2	7.0	8.0	- 0.4
France	7.0	6.8	6.6	7.2	8.1	9.1	9.4	8.6	8.9	6.8	7.2	0.3
United Kingdom	6.4	5.9	5.4	4.9	4.2	3.7	3.4	3.3	3.3	3.4	4.2	- 4.1
Belgium-Luxembourg	7.0	7.2	7.1	7.4	6.6	7.4	6.4	6.3	5.6	4.6	4.1	- 5.2
Netherlands	4.9	4.7	4.9	5.2	5.0	5.0	4.7	4.2	4.1	3.3	2.8	- 5.4
Yugoslavia	1.8	2.1	2.4	2.4	2.8	3.2	3.2	3.1	3.3	2.8	2.6	3.7
United States	3.5	3.5	3.2	2.8	2.2	2.1	1.9	2.1	1.9	2.2	2.0	- 5.4
Japan	10.6	10.4	9.8	9.3	7.0	5.4	3.2	1.9	1.6	1.7	1.6	-17.2
Canada	1.1	1.3	1.5	1.4	1.3	1.2	1.2	1.0	0.7	0.6	0.6	- 5.9
Total EEC (9)	46.8	45.2	45.0	44.1	42.7	33.4	41.5	38.7	39.4	34.9	36.4	- 2.5
Other Developed Market Economies	11.2	10.9	10.8	11.5	11.6	22.1	12.6	12.7	12.7	11.3	11.8	0.5
OPEC	0.1	0.1	0.1	0.1	..	0.1	0.1	..	0.1	0.1	0.1	..
Other Developing Market Economies	22.2	23.6	23.7	24.7	24.3	27.1	30.4	33.7	34.0	40.5	39.1	5.8
Hong Kong	16.0	16.0	15.1	14.7	15.8	15.0	14.4	14.7	15.5	17.2	15.0	- 0.6
S. Korea	0.9	1.5	1.9	2.8	3.4	3.0	5.2	6.5	5.9	8.3	8.1	24.6
Taiwan	1.4	1.1	1.9	2.5	..	2.9	3.2	3.5	2.9	3.4	3.5	9.6
Centrally Planned Economies	2.7	3.0	3.4	3.6	8.1	5.5	5.5	6.7	6.3	5.8	5.9	8.1
ADDENDUM												
Total Imports in Millions of U.S. Dollars	1,380	1,678	2,244	2,531	2,993	3,985	5,517	6,883	7,853	10,011	11,468	

TABLE 11.78

CLOTHING: PERCENTAGE OF CANADA'S EXPORTS BY DESTINATION[2]

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	OECD Share 1977
O.E.C.D.	90.0	93.7	95.2	95.1	95.3	96.0	96.8	95.6	95.1	93.9	94.5	100.0
United States	43.4	54.1	67.8	66.0	73.3	72.8	69.9	63.5	57.4	53.0	54.3	57.5
Japan	0.4	0.1	..	0.4	0.2	0.9	1.8	1.9	3.3	3.3	3.6	3.8
E.E.C. (9)	28.5	21.1	13.0	13.0	10.4	11.3	13.4	16.1	21.4	24.3	21.9	23.2
United Kingdom	14.7	11.4	4.1	3.1	2.8	3.5	4.0	5.4	6.2	6.9	5.9	6.2
Rest of World	10.0	6.3	4.8	4.9	4.7	4.0	3.7	4.4	4.9	6.1	5.5	

1 For source and notes see Table 2.6.

2 For source and notes see Table 2.7.

TABLE 11.79

CLOTHING: GROWTH OF FOREIGN IMPORTS[1]

(percent)

	OECD	U.S.A.	JAPAN	EEC (9)*	OTHER OECD	DEVELOPING COUNTRIES**
1967	-	-	-	-	-	-
1968	21.6	29.7	25.0	20.2	18.6	11.3
1969	33.7	35.0	60.0	38.8	31.0	4.2
1970	12.8	17.0	106.3	8.8	11.1	6.0
1971	18.2	7.5	15.2	41.7	15.0	7.8
1972	33.1	8.9	52.6	47.3	37.7	7.7
1973	38.4	12.6	348.3	53.7	32.1	18.6
1974	21.1	14.5	73.5	31.2	12.7	34.2
1975	17.5	18.6	-36.1	21.7	22.0	25.1
1976	27.5	53.3	49.7	27.9	17.5	22.8
1977	14.6	17.2	13.7	12.7	14.9	34.3

TABLE 11.80

CLOTHING: CANADA'S TRADE SHARE BY MARKET[1]

(percent)

1967	1.1	1.9	..	1.9	0.5	1.1
1968	1.3	2.5	..	1.6	0.5	1.0
1969	1.5	4.0	..	1.1	0.5	0.9
1970	1.4	3.4	0.5	1.0	0.6	1.3
1971	1.3	3.6	0.3	0.9	0.5	1.2
1972	1.2	4.0	0.7	0.9	0.4	1.2
1973	1.2	4.6	0.6	0.9	0.4	1.3
1974	1.0	3.4	0.5	0.9	0.4	1.0
1975	0.8	2.2	1.1	0.7	0.3	0.8
1976	0.6	1.3	0.8	0.7	0.3	0.9
1977	0.6	1.2	0.7	0.5	0.3	0.6

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1 For source and notes see Table 2.8.

TABLE 11.81

CLOTHING: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE OECD[1]

	Import Growth, 1967-77 (average annual percent change): Total OECD Imports	Imports from Canada	Percentage Distribution of Imports: Total OECD Imports 1967	1977	Imports from Canada 1967	1977
TOTAL, CLOTHING	23.6	15.6	100.0	100.0	100.0	100.0
Clothing of textile fabrics; not knitted or crocheted	24.5	15.6	78.0	84.0	43.3	43.5
Accessories of textile fabrics; not knitted or crocheted	16.7	7.6	13.9	- 7.8	5.3	2.6
Headgear	14.9	18.7	4.9	2.4	4.6	6.0
Fur clothing	31.3	15.7	3.2	5.8	46.6	47.2
Gaiters, spats, leggings, etc.	34.0	31.4	..	..	0.2	0.7

TABLE 11.82

CLOTHING: CANADA'S SHARE OF IMPORTS BY THE OECD[1]

(percent

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, CLOTHING	1.1	1.3	1.5	1.4	1.3	1.2	1.2	1.0	0.8	0.6	0.6
Clothing of textile fabrics; not knitted or crocheted	0.6	0.7	1.0	1.0	0.9	0.9	0.8	0.6	0.4	0.3	0.3
Accessories of textile fabrics; not knitted or crocheted	0.4	0.4	0.4	0.3	0.5	0.5	0.4	0.3	0.2	0.2	0.2
Headgear	1.0	1.4	1.4	1.5	2.3	2.0	1.9	2.2	1.7	1.1	1.4
Fur clothing	16.0	16.5	15.2	11.6	10.1	8.7	8.2	7.4	6.1	5.9	4.5
Gaiters, spats, leggings, etc.	11.8	11.3	9.6	12.7	12.0	11.7	9.8	12.4	8.4	8.4	9.6

TABLE 11.83

CLOTHING: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE U.S.A.[1]

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, CLOTHING	1.9	2.5	4.0	3.4	3.6	4.0	4.6	3.4	2.2	1.3	1.2
Clothing of textile fabrics; not knitted or crocheted	1.9	2.3	3.5	3.5	3.4	3.9	4.6	3.3	2.0	1.1	0.9
Accessories of textile fabrics; not knitted or crocheted	0.2	0.1	0.2	0.3	0.8	1.1	0.7	0.3	0.2	0.2	0.1
Headgear	3.2	3.6	3.8	3.4	6.2	5.9	7.7	9.7	8.3	4.6	5.0
Fur clothing	25.7	41.6	48.2	35.9	36.2	30.8	19.4	13.0	21.0	16.6	18.3
Gaiters, spats, leggings, etc.	-	-	-	-	-	-	-	-	-	-	-

1 For source and notes see Table 2.8.

TABLE 11.84

CLOTHING: CANADA'S SHARE OF IMPORTS BY THE U.S.A.[1]

(percent)

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
	Total U.S.A. Imports	Imports from Canada	Total U.S.A. Imports 1967	Total U.S.A. Imports 1977	Imports from Canada 1967	Imports from Canada 1977
TOTAL, CLOTHING	20.8	15.7	100.0	100.0	100.0	100.0
Clothing of textile fabrics; not knitted or crocheted	21.8	13.7	79.6	86.7	77.4	65.0
Accessories of textile fabrics; not knitted or crocheted	15.8	10.2	14.2	9.4	1.5	0.9
Headgear	11.2	16.4	5.2	2.3	8.7	9.3
Fur clothing	28.3	24.0	0.9	1.7	12.4	24.9
Gaiters, spats, leggings, etc.	-	-	-	-	-	-

TABLE 11.85

CLOTHING: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE E.E.C.[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
	Total E.E.C. Imports	Imports from Canada	Total E.E.C. Imports 1967	Total E.E.C. Imports 1977	Imports from Canada 1967	Imports from Canada 1977
TOTAL, CLOTHING	29.6	14.7	100.0	100.0	100.0	100.0
Clothing of textile fabrics; not knitted or crocheted	30.3	16.0	79.3	83.8	28.7	32.0
Accessories of textile fabrics; not knitted or crocheted	17.7	8.8	14.7	5.6	9.0	5.3
Headgear	21.3	19.0	2.5	1.3	2.3	3.3
Fur clothing	43.1	14.5	3.4	9.2	59.8	58.4
Gaiters, spats, leggings, etc.	44.4	40.3	..	0.1	0.1	1.0

TABLE 11.86

CLOTHING: CANADA'S SHARE OF IMPORTS BY THE E.E.C. (EXCLUDING INTRA-TRADE)[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, CLOTHING	1.9	1.6	1.1	1.0	0.9	0.9	0.9	0.9	0.7	0.7	0.5
Clothing of textile fabrics; not knitted or crocheted	0.7	0.4	0.2	0.3	0.2	0.2	0.2	0.3	0.3	0.3	0.2
Accessories of textile fabrics; not knitted or crocheted	1.1	1.0	1.0	0.7	0.8	1.0	0.9	0.8	0.5	0.7	0.5
Headgear	1.7	1.9	2.2	4.0	3.6	2.9	1.6	1.7	0.9	1.0	1.4
Fur clothing	32.1	27.6	15.0	10.2	8.7	7.2	7.2	6.4	5.3	4.9	3.5
Gaiters, spats, leggings, etc.	13.1	9.0	9.7	10.3	14.5	7.9	9.4	7.4	3.7	4.8	9.6

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1 For source and notes see Table 2.8.

TABLE 11.87

FURNITURE AND FIXTURES INDUSTRIES: TRADE MEASURES, 1967 TO 1978

YEAR	DOMESTIC EXPORTS	ADJUSTED IMPORTS[1]	TRADE BALANCE	TRADE TURNOVER (EXPORTS +IMPORTS)	CANADIAN FACTORY SHIPMENTS	CANADIAN MARKET[2]	TRADE BALANCE / TRADE TURNOVER	SHIPMENTS / CANADIAN MARKET	EXPORT ORIENTATION	IMPORT PENETRATION
	(MILLIONS OF DOLLARS)						(PERCENT)			
1967	12	33	-22	45	640	662	-47.6	96.7	1.9	5.1
1968	13	38	-24	51	660	684	-47.3	96.5	2.0	5.5
1969	26	42	-16	68	729	745	-23.6	97.8	3.6	5.7
1970	35	41	-6	76	731	738	-8.2	99.2	4.8	5.6
1971	36	46	-10	82	787	797	-12.3	98.7	4.5	5.8
1972	40	70	-30	110	958	988	-27.2	97.0	4.2	7.1
1973	55	108	-53	163	1,119	1,172	-32.4	95.5	4.9	9.2
1974	61	163	-102	225	1,338	1,440	-45.4	92.9	4.6	11.3
1975	57	152	-95	209	1,364	1,459	-45.5	93.5	4.2	10.4
1976	66	192	-126	258	1,468	1,593	-48.6	92.1	4.5	12.1
1977	87	216	-129	303	1,564	1,693	-42.7	92.4	5.6	12.8
1978	120	243	-123	363	1,823	1,946	-34.0	93.7	6.6	12.5

[1]Total imports less re-exports; [2]Shipments plus imports less exports.

TABLE 11.88

FURNITURE AND FIXTURES INDUSTRIES: EXPORTS AND EXPORT ORIENTATION 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
	(MILLIONS OF DOLLARS)											
DOMESTIC EXPORTS												
TOTAL	12	13	26	35	36	40	55	61	57	66	87	120
HOUSEHOLD FURNITURE MFRS.	7	6	11	16	18	18	22	23	19	18	19	23
OFFICE FURNITURE MFRS.	2	4	8	10	10	11	18	18	14	21	33	51
MISC. FURNITURE & FIXTURE MFRS.	3	3	7	9	8	11	15	20	24	27	34	46
ELECTRIC LAMP & SHADE MFRS.	0	0	0	0	0	0	0	0	0	0	0	0
	(PERCENT)											
EXPORT ORIENTATION												
TOTAL	1.9	2.0	3.6	4.8	4.5	4.2	4.9	4.6	4.2	4.5	5.6	6.6
HOUSEHOLD FURNITURE MFRS.	1.9	1.6	2.8	4.2	4.2	3.4	3.5	3.0	2.5	2.2	2.3	2.3
OFFICE FURNITURE MFRS.	3.5	5.9	9.6	11.6	10.8	10.6	14.8	10.9	7.9	11.3	15.0	20.7
MISC. FURNITURE & FIXTURE MFRS.	1.3	1.6	3.0	3.5	3.3	3.6	4.6	5.5	6.1	6.5	7.5	8.7
ELECTRIC LAMP & SHADE MFRS.	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0

TABLE 11.89

FURNITURE AND FIXTURES INDUSTRIES: SHIPMENTS AND IMPLICIT SELF-SUFFICIENCY[1], 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
					(MILLIONS OF DOLLARS)							
FACTORY SHIPMENTS												
TOTAL	640	660	729	731	787	958	1,119	1,338	1,364	1,468	1,564	1,823
HOUSEHOLD FURNITURE MFRS.	337	351	384	371	420	528	633	762	747	821	836	1,001
OFFICE FURNITURE MFRS.	72	72	87	89	89	108	124	165	181	189	223	247
MISC. FURNITURE & FIXTURE MFRS.	212	216	235	248	253	291	324	368	394	410	458	526
ELECTRIC LAMP & SHADE MFRS.	19	21	23	23	25	31	38	43	42	48	47	49
					(PERCENT)							
SHIPMENTS/CANADIAN MARKET												
TOTAL	96.7	96.5	97.8	99.2	98.7	97.0	95.5	92.9	93.5	92.1	92.4	93.7
HOUSEHOLD FURNITURE MFRS.	96.3	95.8	96.2	97.4	97.0	94.4	91.8	88.7	89.0	86.9	85.8	86.3
OFFICE FURNITURE MFRS.	96.5	99.8	103.5	105.9	105.5	105.5	109.5	103.9	101.3	105.6	110.5	115.3
MISC. FURNITURE & FIXTURE MFRS.	97.9	96.9	99.0	100.0	99.9	99.4	98.7	98.1	99.6	98.4	98.6	101.3
ELECTRIC LAMP & SHADE MFRS.	93.2	93.0	93.9	94.1	93.7	93.3	92.8	91.8	92.7	90.0	89.3	91.8

TABLE 11.90

FURNITURE AND FIXTURES INDUSTRIES: IMPORTS AND IMPORT PENETRATION, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
					(MILLIONS OF DOLLARS)							
ADJUSTED IMPORTS												
TOTAL	33	38	42	41	46	70	108	163	152	192	216	243
HOUSEHOLD FURNITURE MFRS.	20	21	26	26	31	49	79	120	112	142	158	181
OFFICE FURNITURE MFRS.	5	4	5	5	5	6	8	12	12	11	12	18
MISC. FURNITURE & FIXTURE MFRS.	7	10	10	9	9	12	19	27	26	34	41	39
ELECTRIC LAMP & SHADE MFRS.	1	2	1	1	2	2	3	4	3	5	6	4
					(PERCENT)							
IMPORT PENETRATION												
TOTAL	5.1	5.5	5.7	5.6	5.8	7.1	9.2	11.3	10.4	12.1	12.8	12.5
HOUSEHOLD FURNITURE MFRS.	5.6	5.8	6.5	6.7	7.1	8.8	11.4	14.0	13.3	15.0	16.2	15.7
OFFICE FURNITURE MFRS.	6.8	6.0	6.5	6.4	5.8	5.7	6.7	7.4	6.6	6.4	6.1	8.5
MISC. FURNITURE & FIXTURE MFRS.	3.4	4.6	4.0	3.5	3.4	4.2	5.8	7.3	6.5	8.1	8.8	7.5
ELECTRIC LAMP & SHADE MFRS.	6.8	7.0	6.1	5.9	6.3	6.7	7.2	8.2	7.3	10.0	10.7	8.2

1 Ratio of shipments to Canadian market.

TABLE 11.91

FURNITURE AND FIXTURES: OECD IMPORTS BY SOURCE[1]

DISTRIBUTION AND AVERAGE ANNUAL RATE OF CHANGE

	DISTRIBUTION percent											Percent Change
	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1967-1977
Total Imports	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	
Developed Market Economies												
West Germany	22.4	24.5	24.5	23.6	24.1	23.1	23.0	23.0	22.8	23.1	22.9	0.2
Italy	9.3	9.7	10.4	10.2	9.7	10.0	10.1	10.5	12.5	13.6	15.2	5.0
Belgium-Luxembourg	11.5	12.3	11.7	11.0	11.1	11.9	11.6	10.5	10.0	9.3	7.8	- 3.8
Canada	5.5	7.6	9.5	10.1	10.2	8.3	6.3	5.9	5.3	5.5	5.0	- 0.9
Sweden	5.1	4.4	4.4	4.6	4.3	4.6	5.1	5.4	5.8	5.2	4.8	- 0.6
Netherlands	6.0	4.8	4.6	4.7	5.0	5.1	5.4	5.2	5.2	4.8	4.6	- 2.6
United Kingdom	4.4	4.1	4.0	4.0	3.9	3.6	3.4	4.0	4.1	4.0	4.5	0.2
France	3.8	3.7	4.1	4.5	5.0	4.5	4.8	4.8	5.1	4.1	4.4	1.5
Denmark	7.5	6.6	5.7	5.4	5.3	5.7	5.4	5.1	4.7	4.3	4.0	- 6.1
United States	4.5	3.5	3.0	2.7	2.4	2.7	3.0	4.1	3.7	3.8	3.4	- 2.8
Japan	2.4	2.3	2.1	2.0	1.9	2.0	1.3	0.7	0.5	0.5	0.5	-14.5
Total EEC (9)	65.2	65.6	65.2	63.4	64.2	64.0	63.8	63.3	64.8	63.5	63.8	- 0.2
Other Developed Market Economies	10.0	9.4	9.0	9.5	9.1	9.8	10.3	9.8	9.0	9.4	9.3	- 0.7
OPEC	..	..	..	..	..	..	..	..	..	0.1	..	..
Other Developing Market Economies	2.4	2.4	2.4	2.8	1.8	3.2	4.6	4.8	3.9	5.4	6.0	9.6
Centrally Planned Economies	4.9	4.8	4.3	4.7	6.1	5.4	5.5	5.9	6.9	6.8	7.3	4.1
ADDENDUM												
Total Imports in Millions of U.S. Dollars	549	710	946	1,091	1,347	1,767	2,570	3,134	3,404	4,127	5,013	

TABLE 11.92

FURNITURE AND FIXTURES: PERCENTAGE OF CANADA'S EXPORTS BY DESTINATION[2]

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	OECD Share 1977
O.E.C.D.	87.0	87.3	92.4	89.3	91.4	91.6	93.4	94.3	91.8	93.5	93.7	100.0
United States	84.9	83.7	90.5	87.5	89.2	89.5	90.4	87.1	86.4	88.8	89.4	95.4
Japan	0.1	0.1	..	..	..	..	0.2	0.4	..	0.1	..	0.1
E.E.C. (9)	1.7	2.3	1.5	1.2	1.8	1.8	1.9	2.8	4.5	2.8	2.5	2.7
United Kingdom	1.3	2.1	1.1	0.9	1.3	1.6	1.6	2.5	3.9	2.3	1.3	1.4
Rest of World	13.0	12.7	7.6	10.7	8.6	8.4	6.6	5.7	8.2	6.5	6.3	

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1 For source and notes see Table 2.6.

2 For source and notes see Table 2.7.

TABLE 11.93

FURNITURE AND FIXTURES: GROWTH OF FOREIGN IMPORTS[1]

(percent)

	OECD	U.S.A.	JAPAN	EEC (9)*	OTHER OECD	DEVELOPING COUNTRIES**
1967	-	-	-	-	-	-
1968	29.3	46.2	..	12.3	28.4	12.2
1969	33.2	44.4	100.0	23.3	31.5	9.4
1970	15.3	20.3	75.0	22.2	12.6	1.3
1971	23.5	13.0	14.3	30.9	25.7	10.5
1972	31.2	24.1	112.5	38.2	31.4	7.7
1973	45.4	24.1	264.7	60.3	45.6	32.5
1974	21.9	11.7	45.2	17.6	24.2	40.8
1975	8.6	-9.4	-23.3	18.7	11.8	61.3
1976	21.2	35.1	15.9	22.5	18.9	51.1
1977	21.6	21.5	22.5	26.2	20.7	39.0

TABLE 11.94

FURNITURE AND FIXTURES: CANADA'S TRADE SHARE BY MARKET[1]

(percent)

1967	5.4	32.2	1.9	0.4	..	1.1
1968	7.6	40.2	1.3	0.7	..	2.0
1969	9.5	46.4	..	0.5	..	1.9
1970	10.1	47.4	0.3	0.5	..	2.8
1971	10.2	52.2	..	0.4	..	1.7
1972	8.3	44.9	..	0.4	..	2.3
1973	6.3	39.8	0.3	0.4	..	1.7
1974	5.9	40.2	0.4	0.5	..	0.8
1975	5.3	44.2	0.1	0.4	..	0.8
1976	5.5	40.6	0.1	0.3	..	0.5
1977	5.0	36.8	0.1	0.3	..	0.5

1 For source and notes see Table 2.8.

TABLE 11.95

FURNITURE AND FIXTURES: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE OECD[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
	Total OECD Imports	Imports from Canada	Total OECD Imports 1967	Total OECD Imports 1977	Imports from Canada 1967	Imports from Canada 1977
TOTAL, FURNITURE AND FIXTURES	24.8	23.8	100.0	100.0	100.0	100.0
Furniture	24.8	23.8	100.0	100.0	100.0	100.0

TABLE 11.96

FURNITURE AND FIXTURES: CANADA'S SHARE OF IMPORTS BY THE OECD[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, FURNITURE AND FIXTURES	5.4	7.6	9.5	10.1	10.2	8.3	6.3	5.9	5.3	5.5	5.0
Furniture	5.4	7.6	9.5	10.1	10.2	8.3	6.3	5.9	5.3	5.5	5.0

TABLE 11.97

FURNITURE AND FIXTURES: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE U.S.A.[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
	Total U.S.A. Imports	Imports from Canada	Total U.S.A. Imports 1967	Total U.S.A. Imports 1977	Imports from Canada 1967	Imports from Canada 1977
TOTAL, FURNITURE AND FIXTURES	22.1	23.8	100.0	100.0	100.0	100.0
Furniture	22.1	23.8	100.0	100.0	100.0	100.0

TABLE 11.98

FURNITURE AND FIXTURES: CANADA'S SHARE OF IMPORTS BY THE U.S.A.[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, FURNITURE AND FIXTURES	32.2	40.2	46.4	47.4	52.2	44.9	39.8	40.2	44.2	40.6	36.8
Furniture	32.2	40.2	46.4	47.4	52.2	44.9	39.8	40.2	44.2	40.6	36.8

1 For source and notes see Table 2.8.

TABLE 11.99

FURNITURE AND FIXTURES: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE E.E.C.[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
	Total E.E.C. Imports	Imports from Canada	Total E.E.C. Imports 1967	Total E.E.C. Imports 1977	Imports from Canada 1967	Imports from Canada 1977
TOTAL, FURNITURE AND FIXTURES	26.7	24.4	100.0	100.0	100.0	100.0
Furniture	26.7	24.4	100.0	100.0	100.0	100.0

TABLE 11.100

FURNITURE AND FIXTURES: CANADA'S SHARE OF IMPORTS BY THE E.E.C. (EXCLUDING INTRA-TRADE)[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, FURNITURE AND FIXTURES	0.4	0.7	0.5	0.5	0.4	0.4	0.4	0.5	0.4	0.3	0.3
Furniture	0.4	0.7	0.5	0.5	0.4	0.4	0.4	0.5	0.4	0.3	0.3

1 For source and notes see Table 2.8.

TABLE 10.101

PRINTING, PUBLISHING AND ALLIED INDUSTRIES: TRADE MEASURES, 1967 TO 1978

YEAR	DOMESTIC EXPORTS	ADJUSTED IMPORTS[1]	TRADE BALANCE	TRADE TURNOVER (EXPORTS + IMPORTS)	CANADIAN FACTORY SHIPMENTS	CANADIAN MARKET[2]	TRADE BALANCE / TRADE TURNOVER	SHIPMENTS / CANADIAN MARKET	EXPORT ORIENTATION	IMPORT PENETRATION
	(MILLIONS OF DOLLARS)						(PERCENT)			
1967	21	189	-168	210	1,297	1,465	-79.9	88.5	1.6	12.9
1968	19	209	-190	228	1,370	1,560	-83.1	87.8	1.4	13.4
1969	25	240	-215	266	1,488	1,703	-81.0	87.4	1.7	14.1
1970	31	251	-221	282	1,545	1,766	-78.1	87.5	2.0	14.2
1971	33	265	-232	298	1,654	1,886	-77.8	87.7	2.0	14.0
1972	39	284	-245	323	1,854	2,098	-75.7	88.3	2.1	13.5
1973	50	326	-275	376	2,160	2,436	-73.3	88.7	2.3	13.4
1974	66	383	-318	449	2,551	2,868	-70.8	88.9	2.6	13.4
1975	67	445	-378	512	2,897	3,275	-73.7	88.5	2.3	13.6
1976	91	488	-397	578	3,240	3,637	-68.6	89.1	2.8	13.4
1977	91	565	-474	656	3,527	4,001	-72.3	88.1	2.6	14.1
1978	123	678	-555	802	4,063	4,618	-69.2	88.0	3.0	14.7

[1]Total imports less re-exports; [2]Shipments plus imports less exports.

TABLE 11.102

PRINTING, PUBLISHING AND ALLIED INDUSTRIES: EXPORTS AND EXPORT ORIENTATION, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
	(MILLIONS OF DOLLARS)											
DOMESTIC EXPORTS												
TOTAL	21	19	25	31	33	39	50	66	67	91	91	123
PRINTING, PUBLISHING & ALLIED IND.	21	19	25	31	33	39	50	66	67	91	91	123
EXPORT ORIENTATION	(PERCENT)											
TOTAL	1.6	1.4	1.7	2.0	2.0	2.1	2.3	2.6	2.3	2.8	2.6	3.0
PRINTING, PUBLISHING & ALLIED IND.	1.6	1.4	1.7	2.0	2.0	2.1	2.3	2.6	2.3	2.8	2.6	3.0

TABLE 11.103

PRINTING, PUBLISHING AND ALLIED INDUSTRIES: SHIPMENTS AND IMPLICIT SELF-SUFFICIENCY[1], 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
	(MILLIONS OF DOLLARS)											
FACTORY SHIPMENTS												
TOTAL	1,297	1,370	1,488	1,545	1,654	1,854	2,160	2,551	2,897	3,240	3,527	4,063
PRINTING, PUBLISHING & ALLIED IND.	1,297	1,370	1,488	1,545	1,654	1,854	2,160	2,551	2,897	3,240	3,527	4,063
SHIPMENTS/CANADIAN MARKET	(PERCENT)											
TOTAL	88.5	87.8	87.4	87.5	87.7	88.3	88.7	88.9	88.5	89.1	88.1	88.0
PRINTING, PUBLISHING & ALLIED IND.	88.5	87.8	87.4	87.5	87.7	88.3	88.7	88.9	88.5	89.1	88.1	88.0

TABLE 11.104

PRINTING, PUBLISHING AND ALLIED INDUSTRIES: IMPORTS AND IMPORT PENETRATION, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
	(MILLIONS OF DOLLARS)											
ADJUSTED IMPORTS												
TOTAL	189	209	240	251	265	284	326	383	445	488	565	678
PRINTING, PUBLISHING & ALLIED IND.	189	209	240	251	265	284	326	383	445	488	565	678
IMPORT PENETRATION	(PERCENT)											
TOTAL	12.9	13.4	14.1	14.2	14.0	13.5	13.4	13.4	13.6	13.4	14.1	14.7
PRINTING, PUBLISHING & ALLIED IND.	12.9	13.4	14.1	14.2	14.0	13.5	13.4	13.4	13.6	13.4	14.1	14.7

1 Ratio of shipments to Canadian market

TABLE 11.105

PRINTING, PUBLISHING AND ALLIED PRODUCTS: OECD IMPORTS BY SOURCE[1]

DISTRIBUTION AND AVERAGE ANNUAL RATE OF CHANGE

	DISTRIBUTION percent											Percent Change
	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1967-1977
Total Imports	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	
Developed Market Economies												
United States	27.1	26.7	26.4	25.0	22.4	21.0	19.2	20.6	20.2	20.9	19.8	- 3.1
West Germany	13.8	14.5	14.8	15.1	15.6	15.6	17.2	16.5	17.3	17.6	18.3	2.9
United Kingdom	13.3	12.7	12.9	13.0	12.8	12.9	11.8	12.1	12.3	11.2	11.8	- 1.2
Italy	8.5	8.7	9.4	9.0	8.6	8.6	8.3	7.8	7.4	7.8	8.4	- 0.1
France	7.4	7.6	7.0	6.9	7.7	8.1	8.1	7.7	8.1	7.6	7.3	- 0.1
Netherlands	6.3	6.3	6.3	6.2	6.4	6.6	7.0	6.7	6.4	6.3	6.3	..
Belgium-Luxembourg	5.3	5.3	5.2	5.0	5.1	5.3	5.8	5.7	6.0	5.8	5.6	0.6
Switzerland	4.9	4.8	4.7	4.8	5.2	4.9	5.1	5.0	4.3	4.1	4.0	- 2.0
Sweden	1.5	1.5	1.4	1.7	1.8	1.7	1.8	2.0	2.2	2.3	2.1	3.4
Japan	1.3	1.6	1.6	1.7	2.0	2.0	1.9	1.7	1.4	1.7	2.1	4.9
Canada	1.4	1.4	1.5	2.0	2.2	2.3	2.1	2.3	1.9	2.3	2.0	3.6
Total EEC (9)	56.6	57.0	57.7	57.3	58.3	59.2	60.5	58.7	59.9	58.6	59.7	0.5
Other Developed Market Economies	4.2	3.8	3.8	4.3	5.1	5.4	5.6	5.8	6.2	6.0	6.1	3.8
OPEC	0.1	0.2	0.2	0.1	0.1	0.2	0.1	0.1	0.1	0.1	0.1	..
Other Developing Market Economies	1.6	1.6	1.6	1.9	1.7	2.1	2.4	2.7	2.5	2.9	3.0	6.5
Centrally Planned Economies	1.4	1.2	1.1	1.2	1.2	1.1	1.2	1.0	1.2	1.1	1.1	- 2.4
ADDENDUM												
Total Imports in Millions of U.S. Dollars.	935	1,043	1,224	1,385	1,522	1,866	2,303	2,703	3,074	3,313	3,855	

TABLE 11.106

PRINTING, PUBLISHING AND ALLIED PRODUCTS: PERCENTAGE OF CANADA'S EXPORTS BY DESTINATION[2]

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	OECD Share 1977
O.E.C.D.	91.9	91.9	93.2	93.4	94.6	94.6	96.1	95.8	95.6	96.5	96.5	100.0
United States	80.0	81.3	82.0	85.1	85.8	84.8	85.9	87.0	85.9	86.5	85.6	88.7
Japan	0.3	0.2	0.1	0.3	0.3	0.2	0.5	0.3	0.2	0.1	0.1	0.1
E.E.C. (9)	9.2	8.0	8.9	6.0	6.9	7.5	8.0	6.0	7.5	8.5	8.8	9.1
United Kingdom	6.2	4.7	5.6	3.0	4.3	3.3	3.7	2.6	3.1	2.7	2.8	2.9
Rest of World	8.1	8.1	6.8	6.6	5.4	5.4	3.9	4.2	4.4	3.5	3.5	

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1 For source and notes see Table 2.6.

2 For source and notes see Table 2.7.

TABLE 11.107

PRINTING, PUBLISHING AND ALLIED PRODUCTS: GROWTH OF FOREIGN IMPORTS[1]

(percent)

	OECD	U.S.A.	JAPAN	EEC (9)*	OTHER OECD	DEVELOPING COUNTRIES**
1967	-	-	-	-	-	-
1968	11.6	11.7	52.0	6.1	11.1	5.7
1969	17.4	9.6	57.9	16.4	16.7	13.7
1970	13.2	27.0	15.0	12.3	11.2	0.6
1971	9.9	2.5	-52.2	18.6	13.9	15.8
1972	22.6	31.7	121.2	18.9	19.0	6.0
1973	23.4	6.5	9.6	26.7	26.3	16.2
1974	17.4	17.8	32.5	16.2	16.8	19.1
1975	13.7	5.2	10.4	10.8	15.7	31.1
1976	7.8	13.0	- 1.7	5.7	8.0	13.6
1977	16.3	5.6	29.6	17.5	16.9	19.5

TABLE 11.108

PRINTING, PUBLISHING AND ALLIED PRODUCTS: CANADA'S TRADE SHARE BY MARKET[1]

(percent)

1967	1.4	10.5	0.2	1.3	0.1	1.0
1968	1.5	11.3	0.1	1.1	0.1	1.0
1969	1.6	13.1	..	1.1	0.1	0.8
1970	2.0	15.1	0.3	1.2	0.1	0.8
1971	2.2	17.8	0.2	1.3	0.1	0.7
1972	2.3	17.1	0.2	1.5	0.1	0.7
1973	2.1	18.3	0.2	1.6	0.1	0.6
1974	2.3	20.2	0.2	1.6	0.1	0.7
1975	2.0	18.3	0.2	1.4	0.1	0.6
1976	2.3	21.6	0.2	1.3	0.1	0.5
1977	2.0	20.0	0.1	1.6	0.1	0.4

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1 For source and notes see Table 2.8.

TABLE 11.109

PRINTING, PUBLISHING AND ALLIED PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE OECD[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
			Total OECD Imports		Imports from Canada	
	Total OECD Imports	Imports from Canada	1967	1977	1967	1977
TOTAL, PRINTING AND PUBLISHING PRODUCTS	15.2	19.5	100.0	100.0	100.0	100.0
Printed matter	15.2	19.5	100.0	100.0	100.0	100.0

TABLE 11.110

PRINTING, PUBLISHING AND ALLIED PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE OECD[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, PRINTING AND PUBLISHING PRODUCTS	1.4	1.5	1.6	2.0	2.2	2.3	2.1	2.3	2.0	2.3	2.0
Printed matter	1.4	1.5	1.6	2.0	2.[illegible]	2.3	2.1	2.3	2.0	2.3	2.0

TABLE 11.111

PRINTING, PUBLISHING AND ALLIED PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE U.S.A.[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
			Total U.S.A. Imports		Imports from Canada	
	Total U.S.A. Imports	Imports from Canada	1967	1977	1967	1977
TOTAL, PRINTING AND PUBLISHING PRODUCTS	12.7	20.1	100.0	100.0	100.0	100.0
Printed matter	12.7	20.1	100.0	100.0	100.0	100.0

TABLE 11.112

PRINTING, PUBLISHING AND ALLIED PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE UNITED STATES

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, PRINTING AND PUBLISHING PRODUCTS	10.5	11.3	13.1	15.1	17.8	17.1	18.3	20.2	18.3	21.6	20.0
Printed matter	10.5	11.3	13.1	15.1	17.8	17.1	18.3	20.2	18.3	21.6	20.0

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1 For source and notes see Table 2.8.

TABLE 11.113

PRINTING, PUBLISHING AND ALLIED PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE E.E.C.[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
	Total E.E.C. Imports	Imports from Canada	Total E.E.C. Imports		Imports from Canada	
			1967	1977	1967	1977
TOTAL, PRINTING AND PUBLISHING PRODUCTS	14.8	17.2	100.0	100.0	100.0	100.0
Printed matter	14.8	17.2	100.0	100.0	100.0	100.0

TABLE 11.114

PRINTING, PUBLISHING AND ALLIED PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE E.E.C. (EXCLUDING INTRA-TRADE)[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, PRINTING AND PUBLISHING PRODUCTS	1.3	1.1	1.1	1.2	1.3	1.5	1.6	1.6	1.4	1.3	1.6
Printed matter	1.3	1.1	1.1	1.2	1.3	1.5	1.6	1.6	1.4	1.3	1.6

1 For source and notes see Table 2.8.

TABLE 11.115

NON-METALLIC MINERAL PRODUCTS INDUSTRIES: TRADE MEASURES, 1967 TO 1978

YEAR	DOMESTIC EXPORTS	ADJUSTED IMPORTS[1]	TRADE BALANCE	TRADE TURNOVER (EXPORTS +IMPORTS)	CANADIAN FACTORY SHIPMENTS	CANADIAN MARKET[2]	TRADE BALANCE / TRADE TURNOVER	SHIPMENTS / CANADIAN MARKET	EXPORT ORIENTATION	IMPORT PENETRATION
	(MILLIONS OF DOLLARS)						(PERCENT)			
1967	59	188	-128	247	1,082	1,211	-52,0	89.4	5.5	15.5
1968	68	177	-108	245	1,204	1,312	-44,2	91.8	5.7	13.4
1969	83	215	-132	298	1,287	1,419	-44,2	90.7	6.5	15.2
1970	95	217	-122	311	1,265	1,387	-39,2	91.2	7.5	15.6
1971	99	238	-139	337	1,489	1,628	-41.4	91.4	6.6	14.6
1972	130	273	-143	403	1,665	1,808	-35.5	92.1	7.8	15.1
1973	167	320	-153	488	1,923	2,076	-31.4	92.6	8.7	15.4
1974	181	418	-238	599	2,283	2,520	-39.7	90.6	7.9	16.6
1975	171	455	-284	626	2,569	2,853	-45,4	90.1	6.7	15.9
1976	200	511	-311	712	2,841	3,152	-43.7	90.1	7.1	16.2
1977	263	571	-308	833	3,113	3,421	-37.0	91.0	8.4	16.7
1978	391	650	-260	1,041	3,480	3,740	-24.9	93.1	11.2	17.4

[1]Total imports less re-exports; [2]Shipments plus imports less exports.

TABLE 11.116

NON-METALLIC MINERAL PRODUCTS INDUSTRIES: EXPORTS AND EXPORT ORIENTATION, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
					(MILLIONS OF DOLLARS)							
DOMESTIC EXPORTS												
TOTAL	59	68	83	95	99	130	167	181	171	200	263	391
CLAY PRODUCTS MFRS.	4	3	3	2	3	3	4	4	4	4	5	8
CEMENT MFRS.	5	6	9	11	16	23	24	24	23	24	40	63
STONE PRODUCTS MFRS.	1	2	2	3	3	3	2	1	2	2	2	4
CONCRETE PRODUCTS MFRS.	0	1	4	7	10	17	21	16	17	18	21	37
GLASS PRODUCTS MFRS.	2	8	4	5	9	20	33	33	24	29	36	66
GLASS MFRS.	0	0	2	1	1	4	0	0	0	0	0	0
GLASS PRODUCTS MFRS.	2	8	3	4	9	15	33	33	24	29	36	66
ABRASIVE MFRS.	35	38	46	46	38	45	57	66	59	79	91	111
LIME MFRS.	1	1	2	3	4	4	6	8	6	10	14	19
MISC. NON-MET. MINERAL PRODUCTS IND.	11	10	13	17	16	15	21	29	35	33	54	85
REFACTORIES MFRS.	7	6	8	9	9	9	13	13	16	14	19	26
MISC. NON-MET. MIN. PRODUCTS, N.E.S.	4	4	5	8	7	6	8	16	19	18	35	58
EXPORT ORIENTATION					(PERCENT)							
TOTAL	5.5	5.7	6.5	7.5	6.6	7.8	8.7	7.9	6.7	7.1	8.4	11.2
CLAY PRODUCTS MFRS.	4.6	3.5	3.3	3.1	3.0	3.2	3.4	3.1	2.9	2.9	2.9	4.1
CEMENT MFRS.	3.7	4.0	5.6	6.8	8.2	10.5	9.6	7.9	6.7	5.9	9.6	13.0
STONE PRODUCTS MFRS.	10.8	15.9	20.9	33.7	16.2	16.2	11.0	6.8	7.5	7.1	4.9	9.7
CONCRETE PRODUCTS MFRS.	0.2	0.3	1.7	3.6	3.7	5.8	6.7	4.0	3.8	3.9	4.3	7.3
GLASS PRODUCTS MFRS.	1.3	3.4	1.7	2.1	3.3	6.2	9.0	8.3	5.8	6.1	6.6	10.5
GLASS MFRS.	0.2	0.2	1.1	0.4	0.5	2.1	0.0	0.0	0.0	0.0	0.0	0.0
GLASS PRODUCTS MFRS.	2.6	7.8	2.5	4.6	7.5	13.3	23.5	25.2	18.9	18.6	20.4	31.5
ABRASIVE MFRS.	59.2	63.8	67.5	71.1	62.8	62.6	66.3	62.3	58.1	60.7	61.9	66.1
LIME MFRS.	8.3	7.2	12.9	12.5	17.4	16.7	17.9	17.6	14.3	18.9	21.8	25.6
MISC. NON-MET. MINERAL PRODUCTS IND.	22.1	18.4	23.3	8.1	6.7	5.7	6.8	7.6	8.0	6.7	10.0	12.9
REFACTORIES MFRS.	21.6	17.0	21.8	21.6	22.1	22.5	27.0	21.4	22.6	21.6	24.7	29.7
MISC. NON-MET. MIN. PRODUCTS, N.E.S.	23.1	20.8	25.8	4.7	3.6	2.8	3.1	5.0	5.2	4.3	7.5	10.2

TABLE 11.117

NON-METALLIC MINERAL PRODUCTS INDUSTRIES: SHIPMENTS AND IMPLICIT SELF-SUFFICIENCY[1], 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
						(MILLIONS OF DOLLARS)						
FACTORY SHIPMENTS												
TOTAL	1,082	1,204	1,287	1,265	1,489	1,665	1,923	2,283	2,569	2,841	3,113	3,480
CLAY PRODUCTS MFRS.	80	88	86	79	88	95	112	132	144	157	171	191
CEMENT MFRS.	140	151	165	166	193	221	254	298	339	404	420	464
STONE PRODUCTS MFRS.	10	10	10	10	18	16	18	20	24	28	35	38
CONCRETE PRODUCTS MFRS.	194	202	215	206	265	291	313	401	459	465	478	499
GLASS PRODUCTS MFRS.	192	229	251	244	284	316	370	399	421	481	550	623
GLASS MFRS.	104	131	140	149	169	201	229	267	291	324	372	415
GLASS PRODUCTS MFRS.	88	97	110	95	115	115	141	131	129	157	178	208
ABRASIVE MFRS.	59	60	68	64	61	72	86	106	102	131	147	167
LIME MFRS.	13	14	18	20	23	24	31	45	44	54	63	75
MISC. NON-MET. MINERAL PRODUCTS IND.	48	52	57	209	238	271	305	377	441	488	544	656
REFACTORIES MFRS.	31	33	35	42	40	40	47	62	70	66	79	89
MISC. NON-MET. MIN. PRODUCTS, N.E.S.	17	19	21	167	199	231	258	315	371	422	465	567
SHIPMENTS/CANADIAN MARKET						(PERCENT)						
TOTAL	89.4	91.8	90.7	91.2	91.4	92.1	92.6	90.6	90.1	90.1	91.0	93.1
CLAY PRODUCTS MFRS.	70.8	74.0	68.7	67.3	68.4	63.9	65.1	60.8	61.6	61.7	58.5	57.8
CEMENT MFRS.	102.4	102.5	104.1	104.7	107.4	110.3	108.7	105.2	101.3	102.2	106.5	110.9
STONE PRODUCTS MFRS.	94.9	104.0	104.0	121.2	103.1	101.3	98.6	87.5	89.2	88.3	92.9	96.1
CONCRETE PRODUCTS MFRS.	100.1	100.3	101.7	103.7	103.7	105.9	107.0	103.8	103.4	103.6	104.2	107.5
GLASS PRODUCTS MFRS.	69.5	76.8	72.7	72.9	74.1	75.0	77.6	76.1	76.2	73.1	74.6	76.8
GLASS MFRS.	71.1	79.8	78.2	80.7	81.0	80.1	79.6	79.4	82.4	76.8	79.4	79.0
GLASS PRODUCTS MFRS.	67.7	73.1	66.7	63.3	65.8	67.5	74.5	70.0	65.1	66.6	66.3	72.8
ABRASIVE MFRS.	150.3	157.0	161.4	174.0	149.1	154.2	150.5	137.2	133.8	143.9	137.9	143.1
LIME MFRS.	104.9	103.5	109.1	109.5	116.8	115.6	119.2	118.9	112.6	119.4	124.2	129.5
MISC. NON-MET. MINERAL PRODUCTS IND.	58.4	59.8	60.8	84.4	83.9	84.5	83.5	80.8	80.0	82.2	85.2	89.1
REFACTORIES MFRS.	57.3	59.1	61.5	60.2	59.7	59.8	59.8	54.8	51.0	55.8	56.4	58.8
MISC. NON-MET. MIN. PRODUCTS, N.E.S.	60.5	61.0	59.7	94.0	91.4	91.0	90.0	89.0	89.7	88.7	93.2	97.0

1 Ratio of shipments to Canadian market

TABLE 11.118

NON-METALLIC MINERAL PRODUCTS INDUSTRIES: IMPORTS AND IMPORT PENETRATION, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
						(MILLIONS OF DOLLARS)						
ADJUSTED IMPORTS												
TOTAL	188	177	215	217	238	273	320	416	455	511	571	650
CLAY PRODUCTS MFRS.	37	34	42	41	43	57	64	89	94	102	126	147
CEMENT MFRS.	2	2	3	4	3	3	4	9	18	15	15	15
STONE PRODUCTS MFRS.	2	1	2	2	2	2	2	4	5	6	4	5
CONCRETE PRODUCTS MFRS.	0	0	0	0	0	1	1	1	2	2	1	2
GLASS PRODUCTS MFRS.	87	77	98	96	109	125	140	158	156	206	223	254
GLASS MFRS.	42	34	41	36	40	54	59	69	62	98	96	110
GLASS PRODUCTS MFRS.	44	43	58	60	68	71	81	89	94	108	127	144
ABRASIVE MFRS.	15	17	20	18	18	20	28	37	33	40	51	60
LIME MFRS.	0	1	1	1	1	1	1	1	1	1	1	2
MISC. NON-MET. MINERAL PRODUCTS IND.	45	45	50	56	62	65	81	118	145	139	149	165
REFACTORIES MFRS.	30	29	30	37	36	36	44	64	83	67	80	89
MISC. NON-MET. MIN. PRODUCTS, N.E.S.	15	16	20	18	26	29	37	54	62	72	69	76
IMPORT PENETRATION						(PERCENT)						
TOTAL	15.5	13.4	15.2	15.6	14.6	15.1	15.4	16.6	15.9	16.2	16.7	17.4
CLAY PRODUCTS MFRS.	32.5	28.6	33.6	34.8	33.6	38.1	37.1	41.1	40.2	40.1	43.1	44.6
CEMENT MFRS.	1.4	1.6	1.7	2.4	1.4	1.3	1.8	3.1	5.5	3.8	3.8	3.5
STONE PRODUCTS MFRS.	15.3	12.6	17.8	19.7	13.6	15.2	12.3	18.4	17.5	18.0	11.7	13.3
CONCRETE PRODUCTS MFRS.	0.1	0.0	0.0	0.0	0.1	0.2	0.2	0.3	0.4	0.5	0.3	0.4
GLASS PRODUCTS MFRS.	31.4	25.8	28.5	28.6	28.4	29.7	29.4	30.2	28.3	31.3	30.3	31.3
GLASS MFRS.	29.1	20.4	22.7	19.6	19.4	21.6	20.4	20.6	17.6	23.2	20.6	21.0
GLASS PRODUCTS MFRS.	34.1	32.6	34.9	39.6	39.1	41.5	43.0	47.6	47.2	45.8	47.2	50.2
ABRASIVE MFRS.	38.6	43.1	47.6	49.7	44.5	42.4	49.3	48.2	43.9	43.5	47.5	51.5
LIME MFRS.	3.8	3.9	4.9	4.2	3.6	3.6	2.1	2.0	3.5	3.2	2.9	3.6
MISC. NON-MET. MINERAL PRODUCTS IND.	54.5	51.3	53.3	22.4	21.7	20.3	22.1	25.4	26.4	23.3	23.3	22.4
REFACTORIES MFRS.	55.1	51.0	51.9	52.8	53.6	53.7	56.3	57.0	60.6	56.3	57.5	58.7
MISC. NON-MET. MIN. PRODUCTS, N.E.S.	53.5	51.7	55.7	10.4	11.9	11.6	12.8	15.4	15.0	15.1	13.8	13.0

TABLE 11.119

NON-METALLIC MINERAL PRODUCTS: OECD IMPORTS BY SOURCE[1]

DISTRIBUTION AND AVERAGE ANNUAL RATE OF CHANGE

	DISTRIBUTION percent											Percent Change
	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1967-1977
Total Imports	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	
Developed Market Economies												
West Germany	18.6	18.7	19.3	18.7	18.3	17.8	19.1	20.0	19.5	19.8	19.3	0.4
Italy	10.4	11.0	11.4	11.3	12.6	13.3	13.4	12.7	13.2	13.5	14.5	3.4
France	8.0	7.9	8.0	8.4	8.7	9.2	9.5	9.1	9.8	9.3	9.1	1.3
Belgium-Luxembourg	11.3	11.2	10.5	10.8	9.9	10.2	9.6	8.3	8.0	8.3	8.2	- 3.2
United Kingdom	9.2	8.6	8.8	8.4	8.4	7.5	7.0	7.3	8.0	7.2	7.1	- 2.6
United States	9.9	9.0	8.6	8.6	8.1	7.1	6.6	8.0	7.6	7.9	7.0	- 3.4
Japan	7.2	7.9	8.3	6.9	6.3	7.0	6.3	5.6	4.9	5.5	5.9	- 2.0
Netherlands	4.2	4.2	4.0	4.4	4.6	4.9	4.8	4.7	4.9	4.8	4.7	1.1
Canada	1.6	2.1	2.5	2.9	3.2	3.2	3.2	2.5	2.3	2.5	2.7	5.4
Austria	3.2	3.3	3.4	3.7	3.5	2.9	3.1	3.5	3.5	3.0	2.7	- 1.7
Total EEC (9)	63.7	63.7	63.5	63.9	64.6	65.1	65.4	64.4	66.0	65.3	65.2	0.2
Other Developed Market Economies	7.6	7.7	7.7	7.7	8.1	8.1	8.3	8.5	8.6	8.6	8.7	1.4
OPEC	0.1	..	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	..
Other Developing Market Economies	1.7	2.0	2.2	2.3	2.1	2.8	3.3	3.6	3.2	3.7	4.3	9.7
Centrally Planned Economies	5.0	4.2	3.7	3.9	4.2	3.7	3.7	3.8	3.7	3.4	3.4	- 3.8
ADDENDUM												
Total Imports in Millions of U.S. Dollars	1,987	2,205	2,664	3,070	3,403	4,277	5,760	6,796	6,771	7,741	9,169	

TABLE 11.120

NON-METALLIC MINERAL PRODUCTS: PERCENTAGE OF CANADA'S EXPORTS BY DESTINATION[2]

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	OECD Share 1977
O.E.C.D.	93.2	94.1	95.0	92.5	93.4	95.3	92.3	91.9	88.4	91.4	95.5	100.0
United States	82.5	84.3	85.6	80.6	83.8	88.7	80.1	76.8	77.2	80.9	85.2	89.2
Japan	0.6	0.6	0.7	1.0	0.9	0.6	1.0	1.1	0.7	0.6	1.4	1.5
E.E.C. (9)	8.0	7.2	6.8	7.6	6.3	4.3	6.4	9.1	6.8	5.3	5.7	6.0
United Kingdom	5.3	4.2	3.7	3.7	3.4	2.4	3.9	4.6	4.1	3.9	3.9	4.1
Rest of World	6.0	5.9	5.0	7.5	6.6	4.7	7.7	8.1	11.6	8.6	4.5	

1 For source and notes see Table 2.2.

2 For source and notes see Table 2.7.

TABLE 11.121

NON-METALLIC MINERAL PRODUCTS: GROWTH OF FOREIGN IMPORTS[1]

(percent)

	OECD	U.S.A.	JAPAN	EEC (9)*	OTHER OECD	DEVELOPING COUNTRIES**
1967	-	-	-	-	-	-
1968	11.0	28.0	30.4	12.7	6.7	8.8
1969	20.8	16.5	30.0	23.2	21.3	14.6
1970	15.2	7.0	30.8	15.0	17.0	7.8
1971	10.8	2.4	5.9	9.0	13.2	6.7
1972	25.7	39.4	35.2	19.7	23.7	12.9
1973	34.7	21.3	104.1	39.0	35.4	31.1
1974	18.0	2.6	36.2	24.4	19.4	59.2
1975	-0.4	-7.2	-31.5	0.8	2.0	38.9
1976	14.3	18.9	24.5	12.7	13.6	7.4
1977	18.4	25.8	26.0	19.3	16.8	40.3

TABLE 11.122

NON-METALLIC MINERAL PRODUCTS: CANADA'S TRADE SHARE BY MARKET[1]

(percent)

1967	1.6	9.3	1.3	0.9	0.1	0.5
1968	2.1	10.4	0.7	1.3	0.1	0.7
1969	2.5	12.1	1.2	1.4	0.3	0.6
1970	2.9	15.9	1.4	1.4	0.2	0.9
1971	3.2	18.8	1.8	1.6	0.2	0.7
1972	3.2	17.3	2.0	1.6	0.2	0.6
1973	3.2	18.6	1.0	1.7	0.3	0.6
1974	2.5	16.0	0.9	1.9	0.3	0.5
1975	2.3	16.6	0.7	1.5	0.2	0.6
1976	2.5	17.3	0.6	1.7	0.2	0.5
1977	2.7	18.0	0.8	1.6	0.2	0.3

1 For source and notes see Table 2.8.

TABLE 11.123

NON-METALLIC MINERAL PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE OECD[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
	Total OECD Imports	Imports from Canada	Total OECD Imports 1967	Total OECD Imports 1977	Imports from Canada 1967	Imports from Canada 1977
TOTAL, NON-METALLIC MINERAL PRODUCTS	16.5	22.7	100.0	100.0	100.0	100.0
Building stone	12.8	9.0	3.7	2.7	2.5	0.8
Gypsum, etc. for the manufacture of cement	12.5	8.8	1.7	1.2	25.4	7.7
Lime, cement, etc.	15.1	26.6	12.2	10.7	22.5	30.7
Clay construction materials	18.8	8.4	15.3	18.6	19.5	5.6
Mineral manufactures, n.e.s.	17.3	25.3	16.2	17.2	10.1	12.5
Glass	15.3	33.2	21.8	19.6	16.7	38.2
Glassware	16.8	26.9	15.0	15.3	2.9	4.0
Pottery	17.2	19.3	12.3	13.1	0.4	0.3
Ceramic sinks, wash basins, etc.	15.5	28.5	1.7	1.6	0.1	0.2

TABLE 11.124

NON-METALLIC MINERAL PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE OECD[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, NON-METALLIC MINERAL PRODUCTS	1.6	2.1	2.5	2.9	3.2	3.2	3.2	2.5	2.3	2.5	2.7
Building stone	1.1	1.0	1.2	1.3	1.1	1.3	1.0	0.8	0.8	0.9	0.8
Gypsum, etc. for the manufacture of cement	24.1	25.4	24.6	22.0	19.4	21.6	17.8	15.5	12.6	15.1	17.4
Lime, cement, etc.	3.0	3.6	4.6	6.2	7.2	7.7	7.5	7.1	6.4	7.0	7.8
Clay construction materials	2.1	1.7	1.7	1.6	1.3	1.2	1.1	0.9	0.9	0.8	0.8
Mineral manufactures, n.e.s.	1.0	1.1	1.3	1.5	1.8	2.0	1.9	1.8	1.9	1.8	2.0
Glass	1.2	3.0	4.3	5.4	6.4	5.6	6.4	4.7	4.5	5.1	5.3
Glassware	0.3	0.9	0.5	0.2	0.4	0.5	0.7	0.7	0.5	0.6	0.7
Pottery	0.1	0.1	0.1	0.1	0.1	0.2	0.1	0.1	0.1	0.1	0.1
Ceramic sinks, wash basins, etc.	0.1	0.2	0.2	0.3	0.2	0.3	0.4	0.3	0.3	0.3	0.3

TABLE 11.125

NON-METALLIC MINERAL PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE U.S.A.[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
	Total U.S.A. Imports	Imports from Canada	Total U.S.A. Imports 1967	Total U.S.A. Imports 1977	Imports from Canada 1967	Imports from Canada 1977
TOTAL, NON-METALLIC MINERAL PRODUCTS	14.7	22.5	100.0	100.0	100.0	100.0
Building stone	4.3	7.2	0.5	0.2	2.4	0.6
Gypsum, etc. for the manufacture of cement	8.7	8.8	3.3	1.9	28.6	8.7
Lime, cement, etc.	16.3	26.7	11.1	12.8	24.0	33.5
Clay construction materials	15.2	8.3	9.9	10.4	18.8	5.5
Mineral manufactures, n.e.s.	20.6	27.6	6.2	10.2	8.4	12.7
Glass	9.2	32.0	25.7	15.8	16.4	34.5
Glassware	13.5	41.5	15.7	14.1	1.0	4.3
Pottery	17.2	15.8	27.5	34.1	0.3	0.2
Ceramic sinks, wash basins, etc.	n.a	n.a	-	0.4	-	..

1 For source and notes see Table 2.8.

TABLE 11.126

NON-METALLIC MINERAL PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE U.S.A.[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, NON-METALLIC MINERAL PRODUCTS	9.3	10.4	12.1	15.9	18.8	17.3	18.6	16.0	16.6	17.3	18.0
Building stone	42.8	44.1	45.5	43.0	39.2	33.9	26.3	42.7	45.4	57.2	56.4
Gypsum, etc. for the manufacture of cement	80.0	79.0	82.7	78.6	75.4	75.9	80.1	79.2	68.5	74.7	80.7
Lime, cement, etc.	20.1	18.7	23.1	29.6	35.8	32.8	33.0	32.2	37.7	46.0	47.0
Clay construction materials	17.7	12.0	12.5	15.7	13.4	11.3	12.2	11.5	14.3	11.7	9.4
Mineral manufactures, n.e.s.	12.6	10.5	14.9	19.8	23.7	25.5	22.3	22.3	24.1	22.6	22.3
Glass	5.9	11.8	17.0	26.4	32.7	29.0	35.5	28.7	35.4	37.0	39.3
Glassware	0.6	3.9	1.7	0.9	1.8	2.7	3.0	3.5	3.7	4.4	5.6
Pottery	0.1	0.2	0.1	0.2	0.2	0.3	0.2	0.1	0.1	0.1	0.1
Ceramic sinks, wash basins, etc.	-	2.7	1.6	1.3	3.5	1.2	4.1	1.3	0.9	0.3	0.5

TABLE 11.127

NON-METALLIC MINERAL PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE E.E.C.[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
	Total E.E.C. Imports	Imports from Canada	Total E.E.C. Imports		Imports from Canada	
			1967	1977	1967	1977
TOTAL, NON-METALLIC MINERAL PRODUCTS	17.2	24.8	100.0	100.0	100.0	100.0
Building stone	13.7	9.0	12.3	9.1	2.1	0.5
Gypsum, etc. for the manufacture of cement	18.8	n.a.	1.0	1.1	-	..
Lime, cement, etc.	14.8	22.3	10.1	8.3	16.2	13.3
Clay construction materials	17.2	13.4	16.8	16.8	23.6	9.1
Mineral manufactures, n.e.s.	15.2	19.4	20.9	17.7	17.6	11.3
Glass	24.2	43.9	10.1	18.2	14.8	61.5
Glassware	16.3	- 0.9	16.9	15.7	23.8	2.4
Pottery	19.7	13.9	9.0	11.1	1.4	0.6
Ceramic sinks, wash basins, etc.	13.6	35.9	2.8	2.1	0.6	1.3

TABLE 11.128

NON-METALLIC MINERAL PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE E.E.C. (EXCLUDING INTRA-TRADE)[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, NON-METALLIC MINERAL PRODUCTS	0.9	1.3	1.4	1.4	1.6	1.6	1.7	1.9	1.5	1.7	1.6
Building stone	0.1	..	0.6	1.2	0.6	0.2	0.2	0.6	0.1	0.1	0.1
Gypsum, etc. for the manufacture of cement	-	-	-	-	-	0.1	1.1	0.5	0.1	0.2	..
Lime, cement, etc.	1.4	4.6	3.3	4.0	4.8	6.2	4.6	5.5	4.2	4.2	2.6
Clay construction materials	1.2	1.1	1.2	1.4	1.5	1.1	0.6	0.8	0.8	0.8	0.9
Mineral manufactures, n.e.s.	0.7	1.0	1.2	1.3	1.2	1.2	1.3	1.4	1.5	0.7	1.0
Glass	1.3	1.8	2.4	1.8	3.2	2.7	4.2	5.5	4.3	5.3	5.4
Glassware	1.2	1.1	1.2	0.4	0.5	0.8	1.9	1.6	0.4	0.3	0.2
Pottery	0.1	0.2	0.2	0.2	0.3	0.2	0.3	0.3	0.4	0.3	0.1
Ceramic sinks, wash basins, etc.	0.2	0.3	0.4	0.3	0.2	0.6	0.5	0.4	0.8	0.5	1.0

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1 For source and notes see Table 2.8.

TABLE 11.129

PETROLEUM AND COAL PRODUCTS INDUSTRIES: TRADE MEASURES, 1967 TO 1978

YEAR	DOMESTIC EXPORTS	ADJUSTED IMPORTS[1]	TRADE BALANCE	TRADE TURNOVER (EXPORTS +IMPORTS)	CANADIAN FACTORY SHIPMENTS	CANADIAN MARKET[2]	TRADE BALANCE / TRADE TURNOVER	SHIPMENTS / CANADIAN MARKET	EXPORT ORIENTATION	IMPORT PENETRATION
	(MILLIONS OF DOLLARS)						(PERCENT)			
1967	19	191	-172	209	1,558	1,730	-82.2	90.1	1.2	11.0
1968	27	213	-186	240	1,676	1,862	-77.6	90.0	1.6	11.4
1969	32	217	-185	249	1,720	1,906	-74.4	90.3	1.9	11.4
1970	51	202	-151	253	1,819	1,970	-59.6	92.3	2.8	10.3
1971	72	207	-135	279	2,114	2,249	-48.4	94.0	3.4	9.2
1972	148	202	-54	350	2,441	2,495	-15.3	97.8	6.1	8.1
1973	219	189	30	408	3,073	3,043	7.3	101.0	7.1	6.2
1974	376	318	58	694	5,185	5,128	8.3	101.1	7.3	6.2
1975	338	234	104	572	5,953	5,850	18.2	101.8	5.7	4.0
1976	212	201	11	413	6,923	6,912	2.6	100.2	3.1	2.9
1977	201	287	-86	487	8,360	8,446	-17.6	99.0	2.4	3.4
1978	385	358	27	743	9,841	9,814	3.6	100.3	3.9	3.7

[1] Total imports less re-exports; [2] Shipments plus imports less exports.

TABLE 11.130

PETROLEUM AND COAL PRODUCTS INDUSTRIES: EXPORTS AND EXPORT ORIENTATION, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
					(MILLIONS OF DOLLARS)							
DOMESTIC EXPORTS												
TOTAL	19	27	32	51	72	148	219	376	338	212	201	385
PETROLEUM REFINERIES	14	19	24	38	53	126	191	351	312	182	154	291
PETROLEUM REFINING	13	19	23	38	52	126	190	350	311	180	152	290
LUBRICATING OILS & GREASES MFRS.	1	1	0	1	0	1	1	2	1	1	1	1
MISC. PETROLEUM & COAL PRODUCTS IND.	5	8	8	13	19	22	28	25	26	30	47	94
					(PERCENT)							
EXPORT ORIENTATION												
TOTAL	1.2	1.6	1.9	2.8	3.4	6.1	7.1	7.3	5.7	3.1	2.4	3.9
PETROLEUM REFINERIES	0.9	1.2	1.4	2.1	2.5	5.2	6.3	6.9	5.3	2.7	1.9	3.0
PETROLEUM REFINING	0.9	1.2	1.4	2.1	2.6	5.3	6.4	6.9	5.4	2.7	1.9	3.0
LUBRICATING OILS & GREASES MFRS.	1.8	1.5	1.2	1.5	0.9	1.1	1.2	2.4	1.1	1.0	1.1	1.0
MISC. PETROLEUM & COAL PRODUCTS IND.	26.4	40.5	40.9	62.3	75.8	75.4	72.3	44.7	30.2	33.1	54.1	88.6

TABLE 11.131

PETROLEUM AND COAL PRODUCTS INDUSTRIES: SHIPMENTS AND IMPLICIT SELF-SUFFICIENCY[1], 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
						(MILLIONS OF DOLLARS)						
FACTORY SHIPMENTS												
TOTAL	1,558	1,676	1,720	1,819	2,114	2,441	3,073	5,185	5,953	6,923	8,360	9,841
PETROLEUM REFINERIES	1,540	1,657	1,700	1,799	2,089	2,412	3,034	5,130	5,867	6,831	8,273	9,734
PETROLEUM REFINING	1,506	1,622	1,661	1,759	2,046	2,362	2,976	5,057	5,773	6,725	8,155	9,592
LUBRICATING OILS & GREASES MFRS.	34	35	39	40	43	51	58	73	93	105	118	142
MISC. PETROLEUM & COAL PRODUCTS IND.	18	19	20	21	25	29	39	55	86	92	87	106
SHIPMENTS/CANADIAN MARKET						(PERCENT)						
TOTAL	90.1	90.0	90.3	92.3	94.0	97.8	101.0	101.1	101.8	100.2	99.0	100.3
PETROLEUM REFINERIES	91.1	90.6	91.2	93.3	94.9	98.5	101.2	102.0	103.1	100.7	99.7	100.7
PETROLEUM REFINING	92.1	91.6	92.2	94.1	95.7	99.4	102.3	103.0	104.0	101.4	100.3	101.4
LUBRICATING OILS & GREASES MFRS.	61.8	60.8	61.7	68.0	67.4	67.5	66.5	60.9	67.8	70.0	68.0	69.3
MISC. PETROLEUM & COAL PRODUCTS IND.	45.8	55.8	49.0	49.0	53.4	64.1	85.7	56.2	54.1	71.8	60.1	72.2

1 Ratio of shipments to Canadian market

TABLE 11.132

PETROLEUM AND COAL PRODUCTS INDUSTRIES: IMPORTS AND IMPORT PENETRATION, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
						(MILLIONS OF DOLLARS)						
ADJUSTED IMPORTS												
TOTAL	191	213	217	202	207	202	189	318	234	201	287	358
PETROLEUM REFINERIES	165	191	188	168	165	164	154	251	135	135	181	223
PETROLEUM REFINING	143	167	163	148	144	139	124	202	89	88	125	159
LUBRICATING OILS & GREASES MFRS.	22	23	25	19	21	25	30	49	45	46	57	64
MISC. PETROLEUM & COAL PRODUCTS IND.	26	23	29	34	41	38	35	68	99	67	105	135
IMPORT PENETRATION						(PERCENT)						
TOTAL	11.0	11.4	11.4	10.3	9.2	8.1	6.2	6.2	4.0	2.9	3.4	3.7
PETROLEUM REFINERIES	9.8	10.4	10.1	8.7	7.5	6.7	5.2	5.0	2.4	2.0	2.2	2.3
PETROLEUM REFINING	8.8	9.4	9.1	7.9	6.7	5.9	4.3	4.1	1.6	1.3	1.5	1.7
LUBRICATING OILS & GREASES MFRS.	39.3	40.2	39.0	33.0	33.2	33.3	34.3	40.6	32.9	30.7	32.8	31.4
MISC. PETROLEUM & COAL PRODUCTS IND.	66.3	66.8	71.1	81.5	87.1	84.2	76.2	68.9	62.2	52.0	72.4	91.7

TABLE 11.133

PETROLEUM AND COAL PRODUCTS: OECD IMPORTS BY SOURCE[1]

DISTRIBUTION AND AVERAGE ANNUAL RATE OF CHANGE

	DISTRIBUTION percent											Percent Change
	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1967-1977
Total Imports	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	
Developed Market Economies												
Netherlands	10.1	9.2	10.2	12.5	14.0	14.2	16.5	15.0	15.8	15.2	14.2	3.5
United Kingdom	6.9	7.2	7.0	7.4	7.6	7.3	6.6	5.3	6.3	6.4	5.8	- 1.7
Belgium-Luxembourg	2.8	3.5	4.4	3.6	4.1	4.7	5.0	3.8	4.8	5.0	5.6	7.2
Italy	9.2	10.2	9.3	8.7	8.5	8.0	8.1	7.0	5.0	4.5	5.3	- 5.4
West Germany	7.5	8.0	8.2	8.5	8.3	8.2	7.5	6.5	6.5	5.3	4.6	- 4.8
France	4.9	4.2	4.4	3.8	4.3	4.7	4.8	3.7	4.2	4.4	4.5	- 0.8
United States	7.3	6.5	6.6	6.4	5.2	4.9	3.6	2.7	3.5	3.0	3.1	- 8.2
Canada	0.3	0.5	0.6	1.0	0.8	2.0	1.9	2.1	2.0	1.2	1.3	15.8
Japan	..	..	0.1	0.1	0.1	0.2	0.2	0.1	0.4	0.1	..	..
Total EEC (9)	42.2	43.0	44.4	45.6	48.1	48.3	49.5	42.3	43.8	42.0	40.9	- 0.3
Other Developed Market Economies	4.3	5.9	5.1	4.5	3.9	4.1	4.7	4.1	4.8	4.3	4.6	0.7
OPEC	32.0	30.1	30.0	29.1	26.2	24.9	24.3	30.5	24.2	29.1	28.5	- 1.2
Venezuela	12.2	11.2	10.6	10.4	9.4	9.4	7.6	9.6	6.1	8.1	7.9	- 4.3
Netherlands Antilles	9.6	8.8	8.7	7.7	6.2	5.4	6.1	7.5	7.0	4.7	4.6	- 7.1
Other Developing Market Economies	4.3	4.2	4.6	4.8	6.7	6.3	6.0	8.0	8.2	7.1	9.2	7.9
Centrally Planned Economies	9.5	9.7	8.5	8.6	9.0	9.3	9.7	10.2	13.0	13.2	12.3	2.6
U.S.S.R.	6.3	6.2	5.4	5.9	6.4	6.5	7.2	7.3	9.8	9.4	9.2	3.9
ADDENDUM												
Total Imports in Millions of U.S. Dollars	4,609	5,059	5,057	5,970	7,078	7,45[illegible]	12,249	26,207	23,876	27,540	30,660	

TABLE 11.134

PETROLEUM AND COAL PRODUCTS: PERCENTAGE OF CANADA'S EXPORTS BY DESTINATION[2]

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	OECD Share 1977
O.E.C.D.	92.1	92.4	91.3	91.5	96.7	96.1	97.4	97.3	90.9	94.6	99.0	100.0
United States	90.7	88.1	87.8	86.6	92.3	91.5	96.1	77.0	69.5	74.0	85.2	86.1
Japan	0.1	0.7	0.1	..	..	..	..	0.1	..	..	1.0	1.0
E.E.C. (9)	1.1	2.6	3.3	3.7	3.5	2.5	0.9	9.6	15.9	14.5	4.1	4.1
United Kingdom	1.0	1.3	0.9	0.3	0.9	1.8	0.2	3.9	3.1	2.7	1.1	1.1
Rest of World	7.9	7.6	8.7	8.5	3.3	3.9	2.6	2.7	9.1	5.4	3.0	

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1 For source and notes see Table 2.6.

2 For source and notes see Table 2.7.

TABLE 11.135

PETROLEUM AND COAL PRODUCTS: GROWTH OF FOREIGN IMPORTS[1]

(percent)

	OECD	U.S.A.	JAPAN	EEC (9)*	OTHER OECD	DEVELOPING COUNTRIES**
1967	-	-	-	-	-	-
1968	9.8	12.2	21.1	1.0	9.9	2.2
1969	..	7.5	- 6.6	-14.5	2.1	13.9
1970	18.1	18.3	40.2	7.4	17.4	5.0
1971	18.6	9.7	4.3	18.2	24.5	5.6
1972	5.4	17.0	- 6.6	0.5	3.9	- 5.7
1973	64.3	79.9	35.5	91.3	56.5	41.4
1974	114.0	159.5	210.9	107.1	84.8	107.9
1975	-8.9	-28.6	-39.1	27.0	- 0.5	4.4
1976	15.3	- 2.7	131.1	12.7	11.6	- 1.5
1977	11.3	43.7	4.2	- 6.7	6.2	22.6

TABLE 11.136

PETROLEUM AND COAL PRODUCTS: CANADA'S TRADE SHARE BY MARKET[1]

(percent)

1967	0.3	1.4	..	0.2	..	0.2
1968	0.5	2.2	0.1	0.3	..	0.5
1969	0.7	2.6	..	0.5	..	0.6
1970	1.0	4.0	..	0.5	..	0.6
1971	0.9	3.9	..	0.4	..	0.6
1972	2.0	8.1	0.1	0.8	..	0.8
1973	1.9	7.3	0.1	0.5	0.1	0.7
1974	2.1	5.4	..	2.5	0.2	1.0
1975	2.0	6.2	0.1	1.9	0.3	1.6
1976	1.2	5.2	0.1	0.4	0.2	0.7
1977	1.3	4.4	0.1	0.3	0.1	0.3

1 For source and notes see Table 2.8.

TABLE 11.137

PETROLEUM AND COAL PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE OECD[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
			Total OECD Imports		Imports from Canada	
	Total OECD Imports	Imports from Canada	1967	1977	1967	1977
TOTAL, PETROLEUM AND COAL PRODUCTS	20.9	38.9	100.0	100.0	100.0	100.0
Coke and semi-coke	13.8	24.4	6.5	3.5	8.8	2.9
Petroleum products	21.3	41.1	91.5	94.9	81.5	95.8
Mineral tars, etc.	17.7	13.8	2.0	1.5	9.8	1.3

TABLE 11.138

PETROLEUM AND COAL PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE OECD[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, PETROLEUM AND COAL PRODUCTS	0.3	0.5	0.7	1.0	0.9	2.0	1.9	2.1	2.0	1.2	1.3
Coke and semi-coke	0.4	0.6	1.2	1.0	1.3	1.2	1.3	0.8	0.9	1.3	1.0
Petroleum products	0.3	0.5	0.6	1.0	0.8	2.0	2.0	2.2	2.1	1.2	1.3
Mineral tars, etc.	1.6	2.1	1.3	1.4	1.2	1.9	0.8	0.8	0.6	0.9	1.1

TABLE 11.139

PETROLEUM AND COAL PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE U.S.A.[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
			Total U.S.A. Imports		Imports from Canada	
	Total U.S.A. Imports	Imports from Canada	1967	1977	1967	1977
TOTAL, PETROLEUM AND COAL PRODUCTS	23.9	38.7	100.0	100.0	100.0	100.0
Coke and semi-coke	55.4	21.1	0.2	1.7	9.7	2.5
Petroleum products	23.8	41.2	98.9	98.1	81.2	97.1
Mineral tars, etc.	2.2	3.0	0.9	0.1	9.1	0.5

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1 For source and notes see Table 2.8.

TABLE 11.140

PETROLEUM AND COAL PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE U.S.A.[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, PETROLEUM AND COAL PRODUCTS	1.4	2.2	2.6	4.0	3.9	8.1	7.3	5.4	6.2	5.2	4.4
Coke and semi-coke	75.9	85.6	89.1	78.9	91.2	92.0	22.8	4.1	6.6	8.9	6.3
Petroleum products	1.2	1.8	2.2	3.8	3.5	7.8	7.1	5.4	6.2	5.1	4.4
Mineral tars, etc.	13.7	14.6	17.0	14.7	11.7	16.9	16.8	28.7	13.8	12.9	14.9

TABLE 11.141

PETROLEUM AND COAL PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE E.E.C.[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
			Total E.E.C. Imports		Imports from Canada	
	Total E.E.C. Imports	Imports from Canada	1967	1977	1967	1977
TOTAL, PETROLEUM AND COAL PRODUCTS	19.3	27.4	100.0	100.0	100.0	100.0
Coke and semi-coke	14.6	n.a.	1.1	0.7	-	17.7
Petroleum products	19.4	23.3	95.3	96.4	82.2	58.9
Mineral tars, etc.	16.6	31.0	3.7	2.9	17.8	23.4

TABLE 11.142

PETROLEUM AND COAL PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE E.E.C. (EXCLUDING INTRA-TRADE)[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, PETROLEUM AND COAL PRODUCTS	0.2	0.3	0.5	0.5	0.4	0.8	0.5	2.5	1.9	0.4	0.3
Coke and semi-coke	-	-	4.6	7.1	8.6	11.8	2.4	7.0	3.2	12.6	8.3
Petroleum products	0.2	0.3	0.3	0.3	0.3	0.5	0.5	2.5	2.0	0.3	0.2
Mineral tars, etc.	0.8	0.4	0.8	0.1	1.0	2.5	0.1	0.1	-	..	2.7

1 For source and notes see Table 2.8.

TABLE 11.143

MISCELLANEOUS MANUFACTURING INDUSTRIES: TRADE MEASURES, 1967 TO 1978

YEAR	DOMESTIC EXPORTS	ADJUSTED IMPORTS[1]	TRADE BALANCE	TRADE TURNOVER (EXPORTS + IMPORTS)	CANADIAN FACTORY SHIPMENTS	CANADIAN MARKET[2]	TRADE BALANCE / TRADE TURNOVER	SHIPMENTS / CANADIAN MARKET	EXPORT ORIENTATION	IMPORT PENETRATION
	(MILLIONS OF DOLLARS)						(PERCENT)			
1967	209	620	-411	829	853	1,264	-49.6	67.5	24.5	49.0
1968	197	679	-482	876	926	1,409	-55.0	65.8	21.3	48.2
1969	240	793	-553	1,033	1,019	1,572	-53.5	64.8	23.6	50.4
1970	269	817	-548	1,086	1,038	1,586	-50.5	65.4	25.9	51.5
1971	235	853	-618	1,088	1,115	1,733	-56.8	64.3	21.1	49.2
1972	252	1,039	-787	1,290	1,268	2,055	-61.0	61.7	19.9	50.5
1973	298	1,299	-1,001	1,597	1,454	2,455	-62.7	59.2	20.5	52.9
1974	321	1,589	-1,268	1,910	1,795	3,062	-66.4	58.6	17.9	51.9
1975	335	1,709	-1,374	2,044	1,943	3,317	-67.2	58.6	17.2	51.5
1976	358	1,886	-1,528	2,243	2,126	3,654	-68.1	58.2	16.8	51.6
1977	390	2,224	-1,834	2,614	2,352	4,186	-70.1	56.2	16.6	53.1
1978	556	2,765	-2,209	3,321	2,863	5,072	-66.5	56.4	19.4	54.5

[1]Total imports less re-exports; [2]Shipments plus imports less exports.

TABLE 11.144

MISCELLANEOUS MANUFACTURING INDUSTRIES: EXPORTS AND EXPORT ORIENTATION, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
						(MILLIONS OF DOLLARS)						
DOMESTIC EXPORTS												
TOTAL	209	197	240	269	235	252	298	321	335	358	390	556
SCIENTIFIC & PROFESSIONAL EQUIP. IND.	174	160	187	194	148	152	186	197	233	246	257	369
INSTRUMENT & RELATED PRODUCTS MFRS.	168	155	181	187	141	146	175	183	214	223	231	332
CLOCK & WATCH MFRS.	2	1	2	2	1	2	3	3	3	4	6	13
DENTAL LAB. ORTHO. & SURG. GOODS MFRS.	1	1	1	2	3	3	4	5	7	7	8	11
OPHTHALMIC GOODS MFRS.	2	2	2	3	2	2	4	7	8	11	12	14
JEWELLERY & SILVERWARE INDUSTRY	6	3	5	6	6	6	7	9	10	9	11	16
SPORTING GOODS & TOY INDUSTRIES	12	15	25	31	40	43	50	53	43	46	55	72
SPORTING GOODS MFRS.	8	11	18	23	30	31	37	38	28	32	42	57
TOYS & GAMES MFRS.	4	4	7	8	10	12	14	15	16	14	12	15
SIGNS & DISPLAYS INDUSTRY	1	1	1	2	2	2	3	3	2	3	4	3
MISC. MANUFACTURING INDUSTRIES, N.E.S.	17	19	23	37	40	49	52	59	47	55	64	95
BROOM, BRUSH & MOP MFRS.	0	0	0	0	0	0	0	0	1	0	0	1
BUTTON, BUCKLE & FASTENER MFRS.	1	1	1	2	2	3	3	3	2	2	2	3
FLOOR TILE, LINOLEUM & COATED FABRICS	5	6	9	19	24	29	26	26	16	20	21	30
SOUND RECORDING & MUSICAL INSTRUMENTS	2	2	3	4	3	3	4	5	6	6	9	18
PEN & PENCIL MFRS.	1	1	1	0	0	0	1	1	1	1	1	2
FUR DRESSING & DYEING	3	2	2	2	2	2	3	5	5	7	9	11
OTHER MISC. MFG INDUSTRIES N.E.S.	5	6	6	9	8	11	15	20	17	19	23	31
EXPORT ORIENTATION						(PERCENT)						
TOTAL	24.5	21.3	23.6	25.9	21.1	19.9	20.5	17.9	17.2	16.8	16.6	19.4
SCIENTIFIC & PROFESSIONAL EQUIP. IND.	55.0	46.9	50.5	57.7	39.8	36.6	39.5	36.0	36.8	35.2	33.9	41.2
INSTRUMENT & RELATED PRODUCTS MFRS.	74.1	63.1	67.0	80.3	55.0	51.1	55.6	51.1	51.8	47.2	44.6	55.7
CLOCK & WATCH MFRS.	7.9	4.7	6.6	7.2	4.2	3.9	4.9	4.2	3.8	6.0	8.0	1.4
DENTAL LAB. ORTHO. & SURG. GOODS MFRS.	4.7	3.5	4.9	6.7	6.9	5.9	8.4	7.6	10.5	9.6	10.5	11.9
OPHTHALMIC GOODS MFRS.	5.8	5.1	6.0	9.7	7.2	6.3	9.1	13.0	13.6	18.7	14.0	11.5
JEWELLERY & SILVERWARE INDUSTRY	5.6	2.4	4.1	4.9	4.7	3.9	3.5	3.1	3.2	2.8	2.8	3.2
SPORTING GOODS & TOY INDUSTRIES	10.6	11.6	17.3	19.7	22.5	20.4	21.1	17.2	13.6	12.4	14.0	14.3
SPORTING GOODS MFRS.	14.4	17.6	25.9	28.0	31.1	24.8	26.2	20.9	14.5	14.6	20.2	19.4
TOYS & GAMES MFRS.	6.7	5.6	9.2	10.4	12.5	14.1	13.9	12.0	12.2	9.2	6.8	7.3
SIGNS & DISPLAYS INDUSTRY	1.4	1.8	1.7	2.2	2.2	2.5	3.0	2.7	1.7	2.0	2.1	1.8
MISC. MANUFACTURING INDUSTRIES, N.E.S.	8.7	9.2	9.8	10.5	10.7	11.9	11.5	11.1	8.5	9.0	9.8	12.4
BROOM, BRUSH & MOP MFRS.	0.9	1.2	1.0	0.9	0.8	0.6	0.9	0.6	1.2	0.5	0.5	0.7
BUTTON, BUCKLE & FASTENER MFRS.	5.4	4.7	3.9	5.4	5.6	6.8	7.2	6.6	4.3	4.6	3.9	5.2
FLOOR TILE, LINOLEUM & COATED FABRICS	10.8	13.9	16.0	18.6	21.1	20.9	18.5	16.4	11.8	12.6	13.0	15.9
SOUND RECORDING & MUSICAL INSTRUMENTS	6.1	6.3	8.0	9.6	8.0	8.6	9.0	8.9	7.2	6.2	7.7	14.0
PEN & PENCIL MFRS.	3.5	2.6	3.5	2.0	1.0	1.9	2.9	2.0	1.7	1.5	2.3	3.3
FUR DRESSING & DYEING	41.7	30.4	28.6	30.5	20.0	23.2	30.5	40.6	32.1	40.5	48.2	42.9
OTHER MISC. MFG INDUSTRIES N.E.S.	17.0	17.8	16.2	10.9	10.0	12.9	13.8	15.6	12.4	9.6	14.5	16.8

TABLE 11.145

MISCELLANEOUS MANUFACTURING INDUSTRIES: SHIPMENTS AND IMPLICIT SELF-SUFFICIENCY[1], 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
	(MILLIONS OF DOLLARS)											
ADJUSTED IMPORTS												
TOTAL	620	679	793	817	853	1,039	1,299	1,589	1,709	1,886	2,224	2,765
SCIENTIFIC & PROFESSIONAL EQUIP. IND.	394	423	488	498	512	584	721	871	967	1,017	1,241	1,632
INSTRUMENT & RELATED PRODUCTS MFRS.	349	374	430	417	420	470	573	696	755	796	958	1,283
CLOCK & WATCH MFRS.	24	23	27	25	27	37	51	65	80	86	100	119
DENTAL LAB. ORTHO. & SURG. GOODS MFRS.	14	17	19	43	49	57	71	83	101	95	130	162
OPHTHALMIC GOODS MFRS.	8	9	11	14	16	19	25	26	32	40	52	67
JEWELLERY & SILVERWARE INDUSTRY	25	25	29	29	30	39	53	71	80	110	134	141
SPORTING GOODS & TOY INDUSTRIES	54	65	80	84	100	152	189	217	217	284	322	353
SPORTING GOODS MFRS.	23	27	33	38	45	58	79	97	102	133	148	162
TOYS & GAMES MFRS.	32	39	47	47	55	94	110	120	115	152	175	191
SIGNS & DISPLAYS INDUSTRY	7	8	9	8	8	10	11	11	12	11	11	13
MISC. MANUFACTURING INDUSTRIES, N.E.S.	139	158	187	197	203	254	326	420	432	463	516	627
BROOM, BRUSH & MOP MFRS.	3	4	5	5	5	6	7	9	8	11	13	16
BUTTON, BUCKLE & FASTENER MFRS.	3	3	4	5	6	7	9	10	9	10	10	14
FLOOR TILE, LINOLEUM & COATED FABRICS	31	39	47	51	58	71	96	105	109	115	124	145
SOUND RECORDING & MUSICAL INSTRUMENTS	21	21	24	23	28	39	49	66	68	76	78	94
PEN & PENCIL MFRS.	7	7	8	8	8	9	11	14	15	15	19	25
FUR DRESSING & DYEING	6	6	8	6	7	9	10	11	11	14	23	23
OTHER MISC. MFG INDUSTRIES N.E.S.	69	78	91	99	93	113	145	206	212	221	249	310
IMPORT PENETRATION	(PERCENT)											
TOTAL	49.0	48.2	50.4	51.5	49.2	50.5	52.9	51.9	51.5	51.6	53.1	54.5
SCIENTIFIC & PROFESSIONAL EQUIP. IND.	73.5	70.1	72.7	77.8	69.6	68.9	71.6	71.3	70.8	69.2	71.2	75.6
INSTRUMENT & RELATED PRODUCTS MFRS.	85.6	80.5	82.8	90.1	78.4	77.1	80.3	79.9	79.1	76.1	77.0	83.0
CLOCK & WATCH MFRS.	46.2	43.5	46.9	45.5	45.0	48.2	49.1	50.2	53.5	56.8	58.7	11.8
DENTAL LAB. ORTHO. & SURG. GOODS MFRS.	35.0	37.0	38.0	56.7	57.9	57.8	60.9	59.6	61.4	58.7	64.6	67.0
OPHTHALMIC GOODS MFRS.	20.2	22.1	26.1	36.0	35.0	36.0	40.2	36.8	38.7	45.0	41.5	38.8
JEWELLERY & SILVERWARE INDUSTRY	20.8	18.6	20.7	21.1	21.2	21.6	21.5	20.1	21.5	27.2	26.6	22.5
SPORTING GOODS & TOY INDUSTRIES	35.4	36.6	40.3	40.4	41.8	47.6	50.3	46.1	44.1	46.7	49.1	45.0
SPORTING GOODS MFRS.	32.2	33.7	39.1	39.0	40.3	38.5	43.5	40.4	38.6	41.6	46.8	40.8
TOYS & GAMES MFRS.	38.1	38.9	41.1	41.6	43.0	55.8	56.6	52.1	50.4	52.4	51.1	49.3
SIGNS & DISPLAYS INDUSTRY	9.6	10.5	10.9	9.7	9.5	10.6	10.6	9.0	8.1	6.8	6.4	6.3
MISC. MANUFACTURING INDUSTRIES, N.E.S.	44.5	46.2	47.4	38.5	38.2	41.2	44.9	46.8	46.0	45.7	46.6	48.2
BROOM, BRUSH & MOP MFRS.	9.1	9.0	10.7	11.9	10.3	12.0	13.1	13.3	12.9	15.7	17.2	18.8
BUTTON, BUCKLE & FASTENER MFRS.	11.7	11.4	11.2	14.3	14.4	16.5	19.1	21.1	18.2	19.3	19.6	21.4
FLOOR TILE, LINOLEUM & COATED FABRICS	45.2	50.1	51.0	37.4	38.7	39.5	45.9	44.6	48.3	45.3	46.4	47.5
SOUND RECORDING & MUSICAL INSTRUMENTS	40.1	40.6	41.3	40.5	47.8	51.2	55.6	55.6	47.1	47.5	43.2	45.5
PEN & PENCIL MFRS.	25.9	26.7	26.0	28.1	25.9	28.4	30.9	33.0	31.5	30.4	34.9	36.3
FUR DRESSING & DYEING	61.2	51.9	58.8	51.8	50.1	55.9	56.8	58.9	49.9	57.0	71.1	60.3
OTHER MISC. MFG INDUSTRIES N.E.S.	73.4	74.7	73.6	56.9	55.9	60.1	60.2	65.4	63.9	55.4	64.7	67.0

1 Ratio of shipments to Canadian market

TABLE 11.146

MISCELLANEOUS MANUFACTURING INDUSTRIES: IMPORTS AND IMPORT PENETRATION, 1967 TO 1978

INDUSTRY	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1978
						(MILLIONS OF DOLLARS)						
FACTORY SHIPMENTS												
TOTAL	853	926	1,019	1,038	1,115	1,268	1,454	1,795	1,943	2,126	2,352	2,863
SCIENTIFIC & PROFESSIONAL EQUIP. IND.	316	340	370	336	371	416	472	547	632	699	758	896
INSTRUMENT & RELATED PRODUCTS MFRS.	227	246	271	233	257	285	316	358	414	473	517	595
CLOCK & WATCH MFRS.	30	32	33	32	35	41	56	68	72	69	77	899
DENTAL LAB. ORTHO. & SURG. GOODS MFRS.	27	29	32	35	38	45	50	61	71	74	80	91
OPHTHALMIC GOODS MFRS.	32	33	34	28	31	37	41	51	58	60	85	120
JEWELLERY & SILVERWARE INDUSTRY	100	113	116	115	118	146	200	289	303	303	379	501
SPORTING GOODS & TOY INDUSTRIES	111	128	143	155	179	210	237	306	319	370	389	504
SPORTING GOODS MFRS.	56	63	70	82	96	123	139	180	190	219	210	292
TOYS & GAMES MFRS.	55	64	74	73	83	87	98	125	129	151	179	212
SIGNS & DISPLAYS INDUSTRY	69	67	75	81	79	85	93	115	136	149	169	191
MISC. MANUFACTURING INDUSTRIES, N.E.S.	191	203	230	351	368	411	453	537	553	605	656	770
BROOM, BRUSH & MOP MFRS.	35	37	38	39	40	43	47	56	58	61	63	72
BUTTON, BUCKLE & FASTENER MFRS.	23	27	30	31	37	38	39	39	42	44	44	52
FLOOR TILE, LINOLEUM & COATED FABRICS	42	45	54	104	116	137	139	156	133	158	164	190
SOUND RECORDING & MUSICAL INSTRUMENTS	33	33	38	37	33	40	43	58	82	90	110	131
PEN & PENCIL MFRS.	21	21	24	21	22	23	26	30	33	36	37	46
FUR DRESSING & DYEING	7	8	8	8	9	10	11	13	16	18	18	26
OTHER MISC. MFG INDUSTRIES N.E.S.	30	32	39	84	81	87	111	129	137	198	159	183
SHIPMENTS/CANADIAN MARKET						(PERCENT)						
TOTAL	67.5	65.8	64.8	65.4	64.3	61.7	59.2	58.6	58.6	58.2	56.2	56.4
SCIENTIFIC & PROFESSIONAL EQUIP. IND.	58.9	56.4	55.1	52.5	50.5	49.1	46.9	44.8	46.2	47.5	43.5	41.5
INSTRUMENT & RELATED PRODUCTS MFRS.	55.7	52.9	52.1	50.3	48.0	46.7	44.2	41.1	43.4	45.2	41.5	38.5
CLOCK & WATCH MFRS.	58.4	59.4	56.9	58.7	57.4	53.9	53.6	52.0	48.3	45.9	44.9	89.5
DENTAL LAB. ORTHO. & SURG. GOODS MFRS.	68.1	65.3	64.6	46.4	45.2	44.9	42.7	43.7	43.1	45.7	39.6	37.4
OPHTHALMIC GOODS MFRS.	84.7	82.0	78.6	70.9	70.1	68.4	65.8	72.6	71.0	67.6	68.0	69.2
JEWELLERY & SILVERWARE INDUSTRY	83.9	83.5	82.6	82.9	82.7	81.5	81.4	82.4	81.1	74.9	75.5	80.0
SPORTING GOODS & TOY INDUSTRIES	72.3	71.7	72.3	74.2	75.1	65.8	63.1	65.1	64.7	60.8	59.3	64.3
SPORTING GOODS MFRS.	79.3	80.4	82.2	84.7	86.7	81.7	76.7	75.3	71.8	68.4	66.6	73.5
TOYS & GAMES MFRS.	66.3	64.8	64.9	65.2	65.1	51.4	50.3	54.5	56.5	52.4	52.4	54.7
SIGNS & DISPLAYS INDUSTRY	91.7	91.1	90.7	92.4	92.5	91.7	92.1	93.5	93.5	95.1	95.6	95.4
MISC. MANUFACTURING INDUSTRIES, N.E.S.	60.8	59.2	58.3	68.8	69.2	66.7	62.3	59.9	59.0	59.7	59.2	59.2
BROOM, BRUSH & MOP MFRS.	91.7	92.1	90.2	88.9	90.4	88.5	87.7	87.3	88.2	84.8	83.2	61.8
BUTTON, BUCKLE & FASTENER MFRS.	93.3	92.9	92.3	90.6	90.7	89.5	87.1	84.5	85.5	84.6	83.6	82.9
FLOOR TILE, LINOLEUM & COATED FABRICS	61.4	58.0	58.3	76.9	77.7	76.5	66.4	66.3	58.7	62.5	61.6	62.4
SOUND RECORDING & MUSICAL INSTRUMENTS	63.8	63.4	63.8	65.8	56.7	53.4	48.8	48.7	57.0	56.0	61.5	63.4
PEN & PENCIL MFRS.	76.8	75.3	76.6	73.4	74.8	73.0	71.1	68.4	69.7	70.7	66.6	65.9
FUR DRESSING & DYEING	66.5	69.0	57.7	69.4	62.4	57.4	62.1	69.2	73.7	72.2	55.9	69.6
OTHER MISC. MFG INDUSTRIES N.E.S.	32.0	30.8	31.5	48.4	49.0	45.8	46.2	41.0	41.2	49.4	41.3	39.6

TABLE 11.149

MISCELLANEOUS MANUFACTURING PRODUCTS: GROWTH OF FOREIGN IMPORTS[1]

(percent)

	OECD	U.S.A.	JAPAN	EEC (9)*	OTHER OECD	DEVELOPING COUNTRIES**
1967	-	-	-	-	-	-
1968	13.8	19.5	19.8	13.7	11.2	14.7
1969	18.5	13.5	30.4	19.0	19.4	15.8
1970	11.1	10.0	33.1	10.2	10.1	11.8
1971	12.9	4.0	19.9	17.7	13.2	6.3
1972	25.2	30.4	49.4	23.0	21.6	19.3
1973	35.1	24.6	35.2	43.3	34.6	29.9
1974	16.2	8.2	5.2	14.7	21.8	30.2
1975	7.8	-1.9	1.1	11.3	9.9	20.0
1976	19.2	37.5	9.1	13.2	18.5	24.1
1977	24.9	29.5	15.0	30.5	21.3	28.5

TABLE 11.150

MISCELLANEOUS MANUFACTURING PRODUCTS: CANADA'S TRADE SHARE BY MARKET[1]

(percent)

1967	1.0	2.4	0.4	1.3	0.2	0.8
1968	1.0	2.7	0.5	1.3	0.2	0.7
1969	1.1	3.2	0.7	1.1	0.2	0.7
1970	1.3	4.1	0.9	1.2	0.2	0.7
1971	1.3	3.9	1.4	1.4	0.2	0.9
1972	1.2	3.6	1.8	1.1	0.3	0.7
1973	1.0	3.3	0.4	1.0	0.2	0.8
1974	0.9	3.2	0.4	1.0	0.2	0.6
1975	0.8	3.2	0.4	0.9	0.2	0.7
1976	0.9	2.9	0.6	0.9	0.2	0.7
1977	0.8	2.6	0.5	0.7	0.2	0.6

1 For source and notes see Table 2.8.

TABLE 11.147

MISCELLANEOUS MANUFACTURING PRODUCTS: OECD IMPORTS BY SOURCE[1]

DISTRIBUTION AND AVERAGE ANNUAL RATE OF CHANGE

	DISTRIBUTION percent											Percent Change
	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	1967-1977
Total Imports	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	
Developed Market Economies												
United States	17.2	16.6	16.5	16.7	15.7	15.7	14.4	15.9	15.9	15.4	14.0	- 2.0
West Germany	14.4	14.0	14.1	14.8	14.2	13.8	14.4	14.5	14.2	13.4	12.5	- 1.4
United Kingdom	11.1	11.6	11.6	10.5	10.5	10.4	10.1	9.3	8.7	9.7	10.2	- 0.8
Japan	8.2	8.3	8.3	8.5	8.8	9.4	9.0	8.6	8.2	9.3	9.8	1.8
Switzerland	6.7	6.3	6.0	5.7	5.7	5.4	5.6	5.5	5.6	7.5	7.9	1.7
France	4.7	4.5	4.4	4.7	5.0	5.0	5.1	5.4	6.0	5.3	5.0	0.6
Belgium-Luxembourg	5.2	5.1	4.5	3.9	3.7	3.9	3.8	3.6	3.6	4.5	4.7	- 1.0
Italy	4.4	4.5	4.5	4.5	4.5	4.5	4.2	4.2	4.4	4.1	4.4	--
Netherlands	2.9	3.0	3.4	3.2	3.7	3.6	3.7	4.2	4.4	4.2	3.8	2.7
Canada	1.0	1.0	1.1	1.3	1.3	1.2	1.0	0.9	0.8	0.9	0.7	- 3.5
Total EEC (9)	44.3	44.5	44.3	43.0	43.2	42.7	42.9	42.7	43.0	43.0	42.3	- 0.5
Other Developed Market Economies	10.9	11.0	10.8	14.4	15.5	15.5	16.3	15.3	15.5	9.7	9.9	- 1.0
OPEC	0.1	0.2	0.2	0.1	0.1	0.1	0.1	0.2	0.2	0.2	0.3	11.6
Other Developing Market Economies	8.6	9.0	9.4	8.6	7.3	8.2	8.8	8.7	8.7	10.7	11.7	3.1
Hong Kong	3.6	3.5	3.6	4.1	3.6	3.3	3.2	3.0	2.8	3.4	3.6	--
Centrally Planned Economies'	3.0	3.1	3.6	1.8	2.4	1.8	1.9	2.0	2.2	3.3	3.2	0.6
ADDENDUM												
Total Imports in Millions of U.S. Dollars	7,291	8,300	9,836	10,929	12,339	15,451	20,873	24,259	26,150	31,179	38,940	

TABLE 11.148

MISCELLANEOUS MANUFACTURING PRODUCTS: PERCENTAGE OF CANADA'S EXPORTS BY DESTINATION[2]

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977	OECD Share 1977
O.E.C.D.	92.6	94.0	94.0	93.7	91.3	92.3	90.4	90.5	88.1	88.4	87.9	100.0
United States	74.0	74.4	74.6	70.9	66.3	64.1	65.5	62.9	61.1	62.2	62.7	71.3
Japan	0.5	0.6	1.1	1.0	2.4	2.1	1.7	1.7	1.6	2.0	2.0	2.3
E.E.C. (9)	13.2	14.6	14.0	17.6	17.9	19.2	17.8	17.7	17.6	16.9	15.7	17.9
United Kingdom	5.0	6.4	6.8	9.0	10.7	8.3	8.2	8.1	7.3	7.1	5.0	5.7
Rest of World	7.4	6.0	6.0	6.3	8.7	7.7	9.6	9.5	11.9	11.6	12.1	

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1 For source and notes see Table 2.6.

2 For source and notes see Table 2.7.

TABLE 11.151

MISCELLANEOUS MANUFACTURING PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE OECD[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
			Total OECD Imports		Imports from Canada	
	Total OECD Imports	Imports from Canada	1967	1977	1967	1977
TOTAL, MISCELLANEOUS MANUFACTURING PRODUCTS	18.2	15.2	100.0	100.0	100.0	100.0
Furskins	17.1	18.0	1.7	1.6	2.5	3.2
Linoleum	2.0	11.2	1.0	0.2	1.3	0.9
Pearls, precious and semi-precious stones	18.6	14.0	23.1	23.9	4.1	3.7
Metal-plastic joints (gaskets)	16.4	8.8	0.4	0.3	0.2	0.1
Medical electrical equipment	24.0	25.0	1.8	3.0	2.5	5.7
Electrical measuring/controlling instruments	18.1	18.6	8.3	8.1	15.6	20.9
Motorized invalid carriages	40.2	-	..	..	-	-
Professional and scientific instruments	18.0	10.0	23.7	23.2	35.1	22.1
Photographic film, etc.	18.6	32.6	5.9	6.0	3.2	13.0
Developed films	6.9	17.1	0.9	0.3	0.8	0.9
Watches and clocks	17.7	15.0	6.7	6.4	3.3	3.2
Records and tapes	22.4	30.1	2.1	2.9	0.6	1.9
Pianos and other string musical instruments	18.5	8.4	0.7	0.7	0.1	0.1
Musical instruments, n.e.s.	17.8	11.9	1.1	1.1	2.0	1.5
Parts of musical instruments, etc.	16.0	8.3	0.4	0.3	0.2	0.1
Baby and invalid carriages (not motorized)	14.6	3.8	0.2	0.1	0.2	0.1
Games and toys	17.7	12.5	6.6	6.2	5.4	4.2
Sporting goods, excluding firearms	23.4	16.7	2.3	3.5	9.9	11.2
Fair-ground amusements, etc.	21.4	n.a.	..	0.1	-	..
Miscellaneous office supplies	15.6	12.0	2.0	1.6	1.6	1.2
Jewellery	22.4	8.1	3.0	4.3	3.7	2.0
Manufactured articles, n.e.s.	15.0	7.6	8.1	6.1	7.9	4.0

TABLE 11.152

MISCELLANEOUS MANUFACTURING PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE OECD[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, MISCELLANEOUS MANUFACTURING PRODUCTS	1.0	1.0	1.1	1.3	1.3	1.2	1.0	0.9	0.8	0.9	0.8
Furskins	1.4	1.3	1.0	1.0	0.8	0.8	1.0	1.3	1.4	1.3	1.5
Linoleum	1.3	0.9	1.3	1.5	1.4	1.7	0.9	1.1	0.8	1.0	3.0
Pearls, precious and semi-precious stones	0.2	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Metal-plastic joints (gaskets)	0.5	0.5	0.4	0.4	0.7	0.6	0.6	0.6	0.4	0.4	0.3
Medical electrical equipment	1.3	1.7	1.7	1.6	1.6	1.4	1.1	1.3	1.5	1.7	1.4
Electrical measuring/controlling instruments	1.8	1.8	1.6	2.7	2.2	2.0	1.7	1.7	1.5	1.5	1.9
Motorized invalid carriages	-	-	-	0.6	-	-	-	-	-	..	-
Professional and scientific instruments	1.4	1.7	1.5	1.3	1.2	1.0	0.9	0.7	0.7	0.9	0.7
Photographic film, etc.	0.5	1.0	1.6	2.3	2.4	2.3	2.1	2.2	1.9	2.2	1.6
Developed films	0.8	0.9	1.1	2.0	1.8	2.3	2.2	2.2	2.1	1.9	2.0
Watches and clocks	0.5	0.4	0.5	0.6	0.7	0.6	0.6	0.5	0.5	0.5	0.4
Records and tapes	0.3	0.2	0.2	0.5	0.3	0.5	0.6	0.6	0.4	0.5	0.5
Pianos and other string musical instruments	0.2	0.1	0.2	0.1	0.1	0.1	0.1	0.1	0.1	0.2	0.1
Musical instruments, n.e.s.	1.7	1.8	1.8	1.8	1.5	1.2	0.8	1.0	1.1	0.9	1.0
Parts of musical instruments, etc.	0.5	0.8	1.6	2.2	1.1	0.9	0.2	0.3	0.8	0.4	0.2
Baby and invalid carriages (not motorized)	1.0	1.0	0.8	0.6	0.5	0.2	0.2	0.4	0.5	0.5	0.4
Games and toys	0.8	0.7	1.1	1.2	2.0	2.5	1.4	1.3	1.0	0.7	0.5
Sporting goods, excluding firearms	4.2	5.0	5.7	6.4	5.9	5.2	4.8	4.4	2.8	2.6	2.4
Fair ground amusements	-	..	0.4	-	-	..	0.1	0.3	0.4	0.1	0.2
Miscellaneous office supplies	0.8	0.9	0.8	0.7	0.5	0.7	0.7	0.5	0.5	0.5	0.6
Jewellery	1.2	0.5	0.7	0.8	0.6	0.7	0.7	0.8	0.6	0.4	0.3
Manufactured articles, n.e.s.	0.9	1.1	1.1	0.9	1.1	1.8	1.1	0.8	0.9	0.8	0.5

1 For source and notes see Table 2.8.

TABLE 11.153

MISCELLANEOUS MANUFACTURING PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE U.S.A.[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
	Total U.S.A. Imports	Imports from Canada	Total U.S.A. Imports		Imports from Canada	
			1967	1977	1967	1977
TOTAL, MISCELLANEOUS MANUFACTURING PRODUCTS	16.9	17.9	100.0	100.0	100.0	100.0
Furskins	7.7	8.6	0.5	0.2	3.3	1.4
Linoleum	13.6	17.7	0.2	0.2	1.5	1.5
Pearls, precious and semi-precious stones	14.1	6.7	29.9	23.6	3.4	1.3
Metal-plastic joints (gaskets)	-	-	-	-	-	-
Medical electrical equipment	28.3	26.6	1.3	3.3	3.8	7.6
Electrical measuring/controlling instruments	20.9	17.1	3.1	4.3	19.5	18.1
Motorized invalid carriages	-	-	-	-	-	-
Professional and scientific instruments	18.8	14.6	16.2	19.1	29.2	21.8
Photographic film, etc.	19.6	42.8	3.3	4.2	2.9	19.4
Developed films	9.9	21.2	0.5	0.3	0.8	1.0
Watches and clocks	17.6	17.5	9.7	10.3	1.0	1.0
Records and tapes	25.6	29.7	0.8	1.7	0.9	2.2
Pianos and other string musical instruments	13.2	3.3	1.1	0.8	0.2	0.1
Musical instruments, n.e.s.	8.0	10.7	2.2	1.0	4.0	2.1
Parts of musical instruments, etc.	13.8	5.3	0.8	0.6	0.3	0.1
Baby and invalid carriages (not motorized)	16.6	- 2.6	0.1	0.1	0.4	0.1
Games and toys	17.5	12.7	8.6	9.1	5.8	3.7
Sporting goods, excluding firearms	22.9	15.7	4.1	6.7	15.4	12.[illegible]
Fair-ground amusements, etc.	-	-	-	-	-	[illegible]
Miscellaneous office supplies	15.1	11.8	1.0	0.9	2.0	1.[illegible]
Jewellery	26.6	38.0	3.0	6.7	0.2	1.2
Manufactured articles, n.e.s.	9.3	13.0	13.6	7.0	5.4	3.5

TABLE 11.154

MISCELLANEOUS MANUFACTURING PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE U.S.A.[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, MISCELLANEOUS MANUFACTURING PRODUCTS	2.4	2.7	3.2	4.1	3.9	3.6	3.3	3.2	3.2	2.9	2.6
Furskins	14.1	10.2	7.9	9.2	7.3	5.3	7.4	11.4	16.1	13.9	15.2
Linoleum	14.7	11.1	16.4	18.6	17.4	17.3	7.5	9.2	7.0	7.1	20.8
Pearls, precious and semi-precious stones	0.3	0.3	0.3	0.2	..	..	0.1	..	0.1	0.1	0.1
Metal-plastic joints (gaskets)	-	-	-	-	-	-	-	-	-	-	-
Medical electrical equipment	6.8	5.8	6.0	6.3	5.9	4.8	4.5	4.8	5.0	6.2	5.9
Electrical measuring/controlling instruments	15.0	11.3	11.3	20.8	15.4	15.5	13.1	12.3	10.7	8.6	10.9
Motorized invalid carriages	-	-	-	-	-	-	-	-	-	-	-
Professional and scientific instruments	4.2	5.8	5.7	5.8	4.9	3.8	3.5	3.2	3.3	3.6	2.9
Photographic film, etc.	2.0	5.9	9.3	13.5	13.1	13.3	13.7	14.8	14.7	15.7	11.9
Developed films	3.8	4.8	5.4	10.0	9.3	10.9	10.1	10.8	11.2	9.0	10.1
Watches and clocks	0.3	0.2	0.3	0.2	0.2	0.3	0.4	0.2	0.4	0.3	0.3
Records and tapes	2.4	1.4	1.1	2.4	1.8	2.3	1.6	1.5	1.7	2.3	3.3
Pianos and other string musical instruments	0.5	0.4	0.5	0.3	0.3	0.2	0.2	0.3	0.5	0.5	0.2
Musical instruments, n.e.s.	4.3	5.0	5.7	5.7	4.8	4.1	3.3	4.5	6.2	4.5	5.6
Parts of musical instruments, etc.	1.0	1.9	4.0	5.9	2.8	2.2	0.6	0.7	2.0	0.8	0.5
Baby and invalid carriages (not motorized)	14.0	10.9	8.8	5.6	4.4	2.1	3.3	4.8	6.8	4.6	2.3
Games and toys	1.6	1.3	2.2	1.5	3.0	3.0	2.4	1.8	2.2	1.4	1.0
Sporting goods, excluding firearms	8.9	10.5	12.2	13.4	12.9	11.2	11.2	10.5	6.8	5.6	4.9
Fair ground amusements	-	-	-	-	-	-	-	-	-	-	-
Miscellaneous office supplies	4.5	5.6	5.9	6.0	4.2	4.3	4.1	3.1	3.0	3.4	3.4
Jewellery	0.2	0.3	1.3	1.4	1.0	1.3	0.8	1.3	0.8	0.4	0.[illegible]
Manufactured articles, n.e.s.	0.9	1.1	1.1	1.2	1.5	2.1	2.1	1.4	1.8	1.5	1.[illegible]

1 For source and notes see Table 2.8.

TABLE 11.155

MISCELLANEOUS MANUFACTURING PRODUCTS: COMMODITY IMPORT GROWTH AND DISTRIBUTION IN THE E.E.C.[1]

	Import Growth, 1967-77 (average annual percent change)		Percentage Distribution of Imports			
			Total E.E.C. Imports		Imports from Canada	
	Total E.E.C. Imports	Imports from Canada	1967	1977	1967	1977
TOTAL, MISCELLANEOUS MANUFACTURING PRODUCTS	19.3	11.0	100.0	100.0	100.0	100.0
Furskins	20.7	13.9	2.1	2.4	1.6	2.1
Linoleum	0.9	n.a.	0.1	..	0.4	-
Pearls, precious and semi-precious stones	19.3	17.6	37.8	37.8	6.4	11.4
Metal-plastic joints (gaskets)	16.0	9.4	0.2	0.1	0.1	0.1
Medical electrical equipment	25.4	21.0	1.1	1.8	1.0	2.5
Electrical measuring/controlling instruments	17.2	22.6	9.7	8.1	10.5	28.4
Motorized invalid carriages	23.7	-	..	..	-	-
Professional and scientific instruments	18.9	2.4	19.4	18.8	49.0	21.9
Photographic film, etc.	21.5	17.2	3.4	4.1	2.3	3.9
Developed films	6.0	10.2	0.7	0.2	0.8	0.7
Watches and clocks	18.5	13.9	6.7	6.2	6.4	8.3
Records and tapes	18.4	35.2	2.1	1.9	0.2	1.5
Pianos and other string musical instruments	28.4	34.1	0.4	0.7	..	0.1
Musical instruments, n.e.s.	27.0	28.8	0.4	0.8	0.1	0.6
Parts of musical instruments, etc.	11.7	n.a.	0.3	0.1	-	0.1
Baby and invalid carriages (not motorized)	28.4	n.a.	..	..	-	0.1
Games and toys	17.9	14.0	6.0	5.4	3.7	4.9
Sporting goods, excluding firearms	26.7	17.8	1.4	2.5	2.8	5.0
Fair-ground amusements, etc.	52.4	n.a.	..	..	-	0.1
Miscellaneous office supplies	18.4	9.2	1.3	1.2	1.2	1.0
Jewellery	20.3	0.1	1.5	1.6	9.7	3.5
Manufactured articles, n.e.s.	20.1	11.2	5.5	5.9	3.8	3.9

TABLE 11.156

MISCELLANEOUS MANUFACTURING PRODUCTS: CANADA'S SHARE OF IMPORTS BY THE E.E.C. (EXCLUDING INTRA-TRADE)[1]

(percent)

	1967	1968	1969	1970	1971	1972	1973	1974	1975	1976	1977
TOTAL, MISCELLANEOUS MANUFACTURING PRODUCTS	1.3	1.3	1.1	1.2	1.4	1.1	1.0	1.0	0.9	0.9	0.7
Furskins	1.0	1.1	0.7	1.1	0.7	0.7	0.8	0.8	0.3	0.4	0.6
Linoleum	7.2	2.2	4.6	0.1	-	0.7	-	-	0.3	-	-
Pearls, precious and semi-precious stones	0.2	0.1	0.2	..	0.1	0.1	0.1	0.1	0.1	0.1	0.2
Metal-plastic joints (gaskets)	1.0	0.7	0.8	1.3	2.1	2.5	1.4	2.5	0.6	1.2	0.5
Medical electrical equipment	1.3	3.1	2.8	2.6	2.8	1.3	1.3	1.8	1.9	1.5	0.9
Electrical measuring/controlling instruments	1.5	1.9	1.7	2.2	3.5	2.1	1.6	1.9	1.6	1.9	2.3
Motorized invalid carriages	-	-	-	9.6	-	-	-	-	-	-	-
Professional and scientific instruments	3.4	3.2	2.5	1.9	1.9	1.7	1.3	0.8	1.0	1.3	0.8
Photographic film, etc.	0.9	1.3	2.4	2.6	3.0	2.4	2.7	3.2	1.4	1.0	0.6
Developed films	1.5	1.2	1.8	3.2	2.2	1.5	1.8	1.8	1.9	1.5	2.3
Watches and clocks	1.3	1.3	1.4	2.1	2.2	1.8	1.5	1.3	1.4	1.1	0.9
Records and tapes	0.1	0.2	0.2	0.6	0.2	1.0	1.9	2.1	0.7	0.8	0.5
Pianos and other string musical instruments	0.1	..	-	0.2	0.1	..	0.3	0.1	0.1	0.1	0.1
Musical instruments, n.e.s.	0.4	0.4	0.3	0.2	0.5	0.3	0.2	0.2	0.3	1.0	0.5
Parts of musical instruments, etc.	-	0.1	-	..	0.5	0.1	..	0.3	0.3	0.4	0.3
Baby and invalid carriages (not motorized)	-	-	-	-	-	-	-	1.5	0.2	0.9	1.3
Games and toys	0.8	0.6	0.7	1.5	1.9	1.6	1.9	2.8	1.5	1.0	0.6
Sporting goods, excluding firearms	2.7	2.2	2.2	1.7	1.3	1.1	1.8	2.6	1.8	1.8	1.3
Fair ground amusements	-	0.8	13.4	-	-	-	1.2	3.3	7.3	2.3	2.5
Miscellaneous office supplies	1.2	1.2	0.7	0.6	0.5	0.7	0.7	0.6	0.4	0.6	0.6
Jewellery	8.6	3.3	2.4	2.5	2.0	2.7	3.8	3.6	2.8	1.3	1.4
Manufactured articles, n.e.s.	0.9	2.5	2.2	2.4	2.9	2.7	2.1	1.3	1.8	1.6	0.4

1 For source and notes see Table 2.8.