Report to the Minister of Industry, Trade and Commerce

June 30, 1980/Vol. 2

Government of Canada

Textile and Clothing Board du Canada


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Textile and Clothing Board,

Gouvernement du Canada

Commission du textile et du vêtement
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Cat. No. Id 46-2/1980-2E
ISBN 0.662-11032-3 (V.2)

## INQUIRY ON TEXTILES AND CLOTHING

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## INTRODUCTION

Volume II contains details for the textile and clothing items subject to restraint, including work gloves and handbags. These details include sector profiles, apparent Canadian market tables and import tables by source.

Domestic shipment figures for textiles, household products and miscellaneous products were developed by the Textile and Consumer Products Branch, Department of Industry, Trade and Commerce, except for those data relating to handbags, which were developed by Kennedy, Ross and Associates.

Import figures for textiles were developed from Statistics Canada data by the Textile and Clothing Board in cooperation with the Textile and Consumer Products Branch, Department of Industry, Trade and Commerce.

Export figures for textiles were developed by the Textile and Consumer Products Branch, Department of Industry, Trade and Commerce.

Domestic shipment figures for clothing for the years 1975 to 1977 were prepared by the Textile and Clothing Board in cooperation with Statistics Canada. The 1978 and 1979 domestic shipment figures are based on a survey conducted by the Board. The survey shipments were projected utilizing a formula developed by Statistics Canada.

Import figures for clothing were developed by the Textile and Consumer Products Branch, Department of Industry, Trade and commerce.

The export figures for clothing were developed by the Textile and Clothing Board.

The clothing tables should be read in conjunction with the explanatory notes referred to on page 269. The references in the explanatory notes correspond to the numerical references in the tables.

## DEFINITION

All textiles subject to restraint, i.e. sales yarns of cotton, polyester-cotton, acrylic, rayon, nylon, polyester and mixed fibres; broadwoven fabrics of cotton, polyester-cotzon, nylon, polyester, wool (including woollen and worsted), rayon and acetate; mixed fibre fabrics; pile fabrics of man-made fibres; denim, corduroy and coated fabrics; warp-knit fabrics; towels and washcloths, sheets and pillowcases, hosiery, cordage, rope and twine, tablecloths, bedspreads, blankets and bedding, n.e.s.

## INDUSTRY PROFILE

- Based on 1977 Statistics Canada data the textile industry, as defined above, was comprised of 944 establishments.
- Regionally speaking, the industry is primarily located in the Provinces of Québec (46 percent) and Ontario (40 percent).
- In 1979, total employment in the textile and knitting mills sector was 86,800 persons.
- In the period from 1976 to 1978, imports from 'low-cost'and state-trading sources accounted for an average of 27 percent of total imports.
- In 1979, Canadian shipments captured 69 percent of the sales yarn market, a decrease of 6 percentage points from 1978.
- In the woven fabrics market, Canadian shipments continue to supply an ever increasing share of the Canadian market, but accounted for only 45 percent of this market in 1979.


## DEFINITION

Cotton yarns are spun yarns in which the cotton fibre content represents 50 percent or more by weight and polyester-cotton yarns are spun yarns in which polyester and cotton fibres in combination make up 100 percent of the weight.

## SECTOR PROFILE

- There are three Canadian manufacturers of cotton yarns and polyester-cotton yarns, one of whom manufactures only cotton yarns. One company operates five plants while the other two are single plant operations. In total there are six plants producing cotton yarns and four producing polyester-cotton yarns.
- Only two plants are located in Ontario, with the remaining five plants located in Quebec.
- Total employment in this sector is estimated to have been 1,120 at the end of both 1978 and 1979.
- The domestic market for these yarns grew by only 4 percent in 1979, compared to an average annual growth of 13 percent from 1975 to 1978. However, it is believed that the average yarn count has increased toward finer yarns, so that more yarn is shipped per unit of weight.
- Domestic shipments decreased by 2 percent in 1979 as compared to 1978, due to the swing to finer yarn count.
- Imports increased by 17 percent in 1979 from 1978. On an individual country basis total imports from the United States rose by 72 percent, while imports of cotton yarns from the Arab Republic of Egypt almost tripled, from 782,000 kilos in 1978 to 2,225,000 kilos in 1979.


## COTTON SPUN YARNS

## APPARENT CANADIAN MARKET

| Domestic Shipments | 12,417 | 13,512 | 13,700 | 12,042 | 11,025 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Less Exports | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | n/a | n/a | $\mathrm{n} / \mathrm{a}$ |
| Net Domestic Shipments | 12,417 | 13,512 | 13,700 | 12,042 | 11,025 |
| Imports | 5,901 | 8,361 | 7,630 | 9,386 | 10,829 |
| Apparent Canadian Market | 18,318 | 21,873 | 21,330 | 21,428 | 21,854 |
| Share of Market held by |  | --- percent --- |  |  |  |
| Net Domestic Shipments | 68 | 62 | 64 | 56 | 50 |
| Imports | 32 | 38 | 36 | 44 | 50 |

## IMPORTS

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| LOW-COST |  | --- '000 kilos --- |  |  |  |
| Egypt | 157 | 490 | 664 | 782 | 2,225 |
| Brazil | 670 | 2,120 | 2,371 | 3,148 | 1,401 |
| Peru | - | 85 | 2 | 388 | 876 |
| Colombia | 911 | 820 | 599 | 659 | 654 |
| Argentina | - | - | 119 | 279 | 124 |
| Mexico | 298 | 444 | 416 | 213 | 95 |
| Hungary | 148 | 265 | 166 | 131 | 87 |
| El Salvador | 94 | 44 | 29 | 144 | 66 |
| China, P. R. of | 6 | 17 | 15 | 37 | 39 |
| India | - | 1 | - | - | 15 |
| Taiwan | - | - | - | - | 8 |
| Poland | 3 | - | - | - | 1 |
| Hong Kong | 2 | 66 | 2 | 4 | neg |
| Emirates, A. U. | - | - | - | 5 | - |
| Korea, R. of | 10 | 3 | 1 | 1 | - |
| Chile | - | - | - | 2 | - |
| Czechoslovakia | 3 | 1 | 1 | neg |  |
| U.S. Virgin Is. | - | - | - | neg |  |
| Philippines | - | - | 1 | - | - |
| Puerto Rico | 5 | - | - | - |  |
| Pakistan | neg | - | - | - |  |
| Korea, North | neg | - | - | - |  |
| Total Low-Cost | 2,308 | 4,355 | 4,387 | 5,794 | 5,592 |

DEVELOPED

| U.S.A. | 3,098 |
| :--- | ---: |
| United Kingdom | 194 |
| France | 37 |
| Italy | 15 |
| Germany, West | 10 |
| Netherlands | 2 |
| Switzerland | 3 |
| Belgium-Lux. | 3 |
| Japan | 139 |
| Austria | neg |
| Denmark | neg |
| Sweden | neg |
| Total Developed | 3,500 |

## COTTON SPUN YARNS

IMPORTS (Continued)


Totals may not add due to rounding.

## POLYESTER-COTTON SPUN YARNS

## APPARENT CANADIAN MARKET

|  | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | --- '000 kilos --- |  |  |  |  |
| Domestic Shipments | 4,814 | 5,725 | 7,259 | 9,731 | 10,209 |
| Less Exports | $\mathrm{n} / \mathrm{a}$ | n/a | $\mathrm{n} / \mathrm{a}$ | n/a | $\mathrm{n} / \mathrm{a}$ |
| Net Domestic Shipments | 4,814 | 5,725 | 7,259 | 9,731 | 10,209 |
| Imports | 996 | 1,085 | 1,446 | 2,211 | 2,759 |
| Apparent Canadian Market | 5,810 | 6,810 | 8,705 | 11,942 | 12,968 |
| Share of Market held by --- percent |  |  |  |  |  |
| Net Domestic Shipments | 83 | 84 | 83 | 81 | 79 |
| Imports | 17 | 16 | 17 | 19 | 21 |

## POLYESTER-COTTON SPUN YARNS

## IMPORTS

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| LOW-COST |  | --- '000 kilos --- |  |  |  |
| Korea, R. of | - | - | - | 388 | 228 |
| Taiwan | 16 | 11 | 132 | 242 | 192 |
| Brazil | - | - | 2 | 44 | 15 |
| Hong Kong | - | - | 39 | 196 |  |
| Mexico | - | - | 20 | 146 |  |
| Argentina | - | - | - | 75 |  |
| Chile | - | - | - | 10 |  |
| Colombia | - | - | - | 9 |  |
| Thailand | - | 1 | - | - |  |
| El Salvador | 1 | - | - | - |  |
| Singapore | - | - | neg | 二 | - |
| Total Low-Cost | 17 | 12 | 192 | 1,109 | 435 |

## DEVELOPED

U.S.A. 94

Japan
941
36
2
neg
Ireland
Netherlands
Italy
-
Germany, West -
Belgium-Lux.
France
Total Developed
979
1,148
961
2,271
29
5
64
39
2
neg
37
-

OTHER


Totals may not add due to rounding.

## DEFINITION

All types of cotton system spun yarns containing 50 percent or more by weight of acrylic fibres.

## SECTOR PROFILE

- There are four Canadian manufacturers of these products.
- Three of the plants are located in Quebec and one in Ontario.
- Total employment in this sector is estimated to have been 358 on December 31, 1979, a negligible increase from the 351 estimated to have been employed one year earlier.
- The domestic market for these yarns grew by 16 percent from 1978 to 1979. During that period, domestic shipments increased by 9 percent, while imports increased by 50 percent.
- Imports from the United States increased from 361 thousand kilos in 1978 to 1,086 thousand kilos in 1979, or 200 percent, and accounted for 73 percent of total imports of these yarns in 1979.
- Two of the four Canadian manufacturers of these products are planning major capital expenditures to expand their production capacity for these yarns.


## COTTON SPUN ACRYLIC YARNS

## APPARENT CANADIAN MARKET

|  | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  |  |  | 000 kil |  |  |
| Domestic Shipments |  | 4,429 | 4,906 | 4,920 | 5,364 |
| Less Exports |  | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ |
| Net Domestic Shipments |  | 4,429 | 4,906 | 4,920 | 5,364 |
| Imports |  | 355 | 1,264 | 997 | 1,493 |
| Apparent Canadian Market | $\mathrm{n} / \mathrm{a}$ | 4,784 | 6,170 | 5,917 | 6,857 |
| Share of Market held by --- percent |  |  |  |  |  |
| Net Domestic Shipments |  | 93 | 80 | 83 | 78 |
| Imports |  | 7 | 20 | 17 | 22 |

## COTTON SPUN ACRYLIC YARNS

IMPORTS

| SOURCE | 1975* | $\underline{1976}$ | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| LOW-COST |  | --- '000 kilos --- |  |  |  |
| Taiwan |  | - | 14 | $(351)^{1}$ | $(565)^{1}$ |
| Philippines |  | - | neg | 2 | 6 |
| Korea, R. of |  | - | 10 | 33 | - |
| Brazil |  | - | neg | - | - |
| Total Low-Cost | - | - | 24 | 35 | 6 |

DEVELOPED

| U.S.A. | 72 | 500 | 361 | 1,086 |
| :---: | :---: | :---: | :---: | :---: |
| Japan | 16 | 701 | 488 | 388 |
| Italy | 8 | 3 | 2 | 6 |
| Germany, West | - | neg | 16 | 4 |
| United Kingdom | 260 | neg | 4 | - |
| Ireland | 1 | neg | - | - |
| Belgium-Lux. | - | neg | neg |  |
| France | neg | 24 | 1 | - |
| Total Developed | 357 | 1,229 | 872 | 1,485 |

OTHER

| Spain Israel |  | - | 11 | 90 | 2 |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  |  | - | neg | - | - |
| Total Other | - | - | 11 | 90 | 2 |
| TOTAL ALL SOURCES | - | 355 | 1,264 | 997 |  |

* Not available.
${ }^{1}$ Transferred to worsted spun.
Totals may not add due to rounding.


## DEFINITION

All types of machine knitting and hand knitting acrylic yarns containing 50 percent or more by weight of acrylic fibres and spun on worsted or modified worsted systems.

## SECTOR PROFILE

- There are nine Canadian manufacturers of these products.
- Seven of the nine plants are in Ontario and two in Quebec. Four of the plants are located in the metropolitan Toronto area with the balance in small communities with the exception of one in Hamilton.
- Total employment in this sector was at 1,099 on December 31, 1979, an increase of 74 from a year earlier.
- Although the apparent Canadian market shows a 2 percent increase in 1979 over the 1978 level, excessive inventories at the end of 1977 are estimated to have been consumed in 1978, which is not reflected in the 1978 market table. As a result, the actual 1979 market declined by about 3 percent when compared to a 1978 market which takes account of that fact.
- Domestic shipments of these yarns decreased by 3 percent in 1979 compared to 1978, and machine knitting yarns declined by 8 percent. All Canadian mills reported below capacity operations and loss of orders to imports due to price competition.
- Imports of these yarns in 1979 were up by 13 percent over their 1978 levels.


## APPARENT CANADIAN MARKET

| Domestic Shipments | 5,961 | 5,863 | 6,423 | 6,270 | 6,071 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Less Exports | $\mathrm{n} / \mathrm{a}$ | n/a | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ |
| Net Domestic Shipments | 5,961 | 5,863 | 6,423 | 6,270 | 6,071 |
| Imports | 2,806 | 2,836 | 3,822 | 2,965 | 3,362 |
| Apparent Canadian Market | 8,767 | 8,699 | 10,245 | 9,235 | 9,433 |
| Share of Market held by |  |  | - percen |  |  |
| Net Domestic Shipments | 68 | 67 | 63 | 68 | 64 |
| Imports | 32 | 33 | 37 | 32 | 36 |

## IMPORTS



## DEVELOPED

| U.S.A. | 346 | 303 | 377 | 717 |
| :--- | ---: | ---: | ---: | ---: |
| Japan | 836 | 1,077 | 452 | 400 |
| France | 129 | 123 | 137 | 175 |
| Italy | neg | 4 | 5 | 16 |
| Germany, West | 14 | 31 | 24 | 13 |
| United Kingdom | 44 | 126 | 6 | 10 |
| Netherlands | 16 | 6 | 14 | 6 |
| Belgium-Lux. | 2 | 14 | 15 | 1 |
| Ireland | 1 | 1 | 1 | 1 |
| Switzerland | 2 | 1 | neg | 1 |
| New Zealand | - | - | neg | neg |
| Norway | - | - | neg | neg |
| South Africa |  | - | neg | - |
|  |  |  | 1,686 | 1,032 |

## OTHER



RAYON, NYLON AND POLYESTER YARNS, MIXED AND BLENDED YARNS AND THREAD N,E,S.

## DEFINITION

Rayon, nylon and polyester yarns are spun or filament yarns in which any or all of the rayon, nylon, or polyester fibres (except for polyester-cotton blends) in combination represents 50 percent or more by weight. Mixed and blended yarns and thread n.e.s. are spun or filament yarns containing a mixture of textile fibres or filaments where no one fibre represents 50 percent or more by weight.

## SECTOR PROFILE

- There are eighteen companies producing these products in twenty four Canadian plants.
- Ten plants are located in Ontario and fourteen in Quebec.
- As most of the manufacturing of these products is carried out in multi-product plants, employment directly and solely related to these products is not available. The Textile and Consumer Products Branch of the Department of Industry, Trade and Commerce estimates that in 1979 there were:
- 3,524 employed in the manufacture of filament yarns
- 1,300 employed in the manufacture of spun yarns.
- The domestic market for these items grew by 17 percent in 1979 over 1978. Imports increased their share of the market to 29 percent from 22 percent, while the market share held by domestic manufacturers declined from 78 percent in 1978 to 71 percent in 1979.
- Domestic shipments increased by 7 percent in 1979 over 1978.
- Imports increased by 52 percent in 1979 over 1978, and are dominated by those yarns imported from the United States.

RAYON, NYLON AND POLYESTER YARNS, MIXED AND BLENDED YARNS AND THREAD, NiE,S,

## APPARENT CANADIAN MARKET

|  | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | --- '000 kilos --- |  |  |  |  |
| Domestic Shipments | 81,180 | 75,102 | 88,819 | 96,712 | 103,348 |
| Less Exports | $\mathrm{n} / \mathrm{a}$ | n/a | n/a | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ |
| Net Domestic Shipments | 81,180 | 75,102 | 88,819 | 96,712 | 103,348 |
| Imports | 28,369 | 28,105 | 25,344 | 27,751 | 42,254 |
| Apparent Canadian Market | 109,549 | 103,207 | 114,163 | 124,463 | 145,602 |
| Share of Market held by --- percent |  |  |  |  |  |
| Net Domestic Shipments | 74 | 73 | 78 | 78 | 71 |
| Imports | 26 | 27 | 22 | 22 | 29 |

## IMPORTS

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| LOW-COST | --- '000 kilos --- |  |  |  |  |
| Taiwan | - | 74 | 54 | 68 | 11 |
| Hong Kong | - | neg | - | 1 | 2 |
| Korea, R. of | 2 | - | neg | - | neg |
| Singapore | - | - | - | 5 |  |
| Philippines | - | - | - | 4 |  |
| Mexico | - | 1 | 5 | neg |  |
| Czechoslovakia | 3 | - | - | - |  |
| Total Low-Cost | 5 | 75 | 59 | 78 | 14 |

DEVELOPED

| U.S.A. | 2,283 | 1,188 | 1,554 | 1,606 | 2,108 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Japan | 327 | 238 | 169 | 120 | 199 |
| United Kingdom | 79 | 28 | 23 | 110 | 151 |
| Italy | 11 | 15 | 10 | 40 | 73 |
| Belgium-Lux. | 134 | 66 | 49 | 57 | 22 |
| France | 32 | 6 | 10 | 9 | 22 |
| Germany, West | 34 | 50 | 17 | 10 | 18 |
| Ireland | neg | 3 | 2 | 3 | 3 |
| Netherlands | 7 | 3 | neg | 2 | 1 |
| Switzerland | neg | neg | neg | 1 | neg |
| Sweden | neg | - | - | neg | neg |
| Denmark | - | neg | neg | neg | - |
| Norway | - | - | - | neg | - |
|  | - | - |  |  | - |
| Total Developed | 2,908 | 1,598 | 1,835 | 1,959 | 2,597 |

OTHER

| Spain | - | - | - | 5 | 8 |
| :--- | ---: | ---: | ---: | ---: | ---: | ---: |
| Israel | - | - | - | 3 | 6 |
| Greece | neg | - | - | - | 1 |
| Portugal | - | - | - | $-n e g$ | - |
| Total Other | neg | - | - | 9 | 15 |
|  |  |  |  |  |  |
| TOTAL ALL SOURCES | 2,913 | 1,673 | 1,894 | 2,046 | 2,626 |

Totals may not add due to rounding.

## RAYON FILAMENT YARNS

INDEX ${ }^{(1)}$
$1975=100$

## APPARENT CANADIAN MARKET

|  | $\underline{1975}$ | $\underline{1976}$ | $\underline{1977}$ | $\underline{1978}$ | $\underline{1979}$ |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Domestic Shipments | 100 | 61 | 71 | 86 | 96 |
| Less Exports | 100 | 56 | 153 | 219 | 238 |
| Net Domestic Shipments | 100 | 62 | 55 | 60 | 68 |
| Imports | 100 | 209 | 127 | 143 | 146 |
| Apparent Canadian Market | 100 | 89 | 69 | 76 | 83 |
|  |  |  |  |  |  |
| Share of Market held by |  |  | 69 | 80 | 79 |
| Net Domestic Shipments | 100 | 100 | 232 | 184 | 189 |

${ }^{(1)}$ Indexed to retain confidentiality

## IMPORTS

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| LOW-COST |  | --- '000 kilos --- |  |  |  |
| Brazil | 68 | 14 | 37 | 72 | 49 |
| Korea, R. of | - | 34 | 7 | 20 | 28 |
| Mexico | 68 | 68 | 57 | 45 | 9 |
| Taiwan | 71 | 111 | 90 | 14 | 5 |
| Czechoslovakia | 2 | - | 1 | - | - |
| Argentina | - | - | - | neg |  |
| Romania | - | 3 | - | - | - |
| India | neg | - | - | - | - |
| Colombia | 5 | 5 | - | - | - |
| Pakistan | neg | - | 二 | - | - |
| Total Low-Cost | 215 | 235 | 191 | 151 | 91 |

DEVELOPED

| U.S.A. | 1,474 | 3,880 | 2,154 | 2,340 | 2,444 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| United Kingdom | 324 | 302 | 258 | 241 | 303 |
| Netherlands | 93 | 49 | 38 | 139 | 261 |
| Japan | 69 | 194 | 147 | 221 | 103 |
| Germany, West | 57 | 59 | 50 | 104 | 78 |
| France | 10 | 4 | 8 | 17 | 9 |
| Austria | - | - | - | neg | 6 |
| Italy | 7 | 1 | 1 | 1 | 5 |
| Belgium-Lux. | neg | 5 | 34 | 10 | neg |
| Switzerland | 11 | 2 | 1 | neg |  |
| Ireland | 3 | - | - | - | - |
| Total Developed | 2,048 | 4,494 | 2,691 | 3,074 | 3,209 |

OTHER

| Spain | 7 | - | 5 | 11 | 12 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Yugoslavia | - | 11 | - | - | - |
| Total Other | 7 | 11 | 5 | 11 | 12 |
| TOTAL ALL SOURCES | 2,269 | 4,740 | 2,887 | 3,236 | 3,312 |
| Of which, estimated Rayon Filament Yarns | 2,269 | 4,740 | 2,887 | 3,236 | 3,312 |

## NYLON FILAMENT YARNS

> INDEX (1)
> $1975=100$

## APPARENT CANADIAN MARKET

|  | 1975 | 1976 | 1977 | 1978 | 1979 |
| :--- | :---: | :---: | :---: | :---: | :---: |
| Domestic Shipments | 100 | 98 | 112 | 127 | 138 |
| Less Exports | 100 | 132 | 233 | 376 | 328 |
| Net Domestic Shipments | 100 | 97 | 108 | 119 | 132 |
| Imports | 100 | 101 | 104 | 82 | 141 |
| Apparent Canadian Market | 100 | 98 | 107 | 110 | 134 |
| Share of Market held by |  |  |  |  | 108 |
| Net Domestic Shipments | 100 | 100 | 99 | 104 | 96 |

[^0]
## IMPORTS

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| LOW-COST | --- '000 kilos --- |  |  |  |  |
| Taiwan | 15 | 15 | 11 | 47 | 147 |
| Korea, R. of | 43 | 73 | 86 | 131 | 34 |
| Puerto Rico | - | - | - | 2 | 15 |
| Panama | - | - | - | - | 7 |
| Brazil | - | - | - | - | neg |
| Malta | 4 | 64 | 5 | - |  |
| Mexico | - | - | - | neg |  |
| Total Low-Cost | 63 | 152 | 102 | 181 | 203 |

DEVELOPED

| U.S.A. | 10,968 |
| :--- | ---: |
| Japan | 86 |
| Italy | 645 |
| United Kingdom | 401 |
| Ireland | 92 |
| France | 183 |
| Germany, West | 466 |
| Switzerland | 153 |
| Austria | 65 |
| Finland | 215 |
| Netherlands | 48 |
| Belgium-Lux. | - |
| Denmark | - |
| Sweden | 2 |
| South Africa | neg |

Total Developed
13,325

OTHER

| Greece | - | - | - | 28 | 41 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Israel | 38 | 160 | 210 | 36 | 17 |
| Spain | 88 | 20 | 13 | 43 | 5 |
| Portugal | - | - | - | - | - |
| $\quad$ Yugoslavia | - | - | - | - | 64 |
| Total Other | 126 | 186 | 227 | 107 |  |
|  |  |  |  |  |  |
| TOTALALL SOURCES | 13,515 | 13,656 | 14,057 | 11,094 | 19,005 |
| of which estimated |  |  |  |  |  |
| Nylon Filament Yarns | 11,487 | 11,608 | 11,949 | 9,430 | 16,154 |

Totals may not add due to rounding.

## POLYESTER FILAMENT YARNS

index ${ }^{(1)}$
$1975=100$

## APPARENT CANADIAN MARKET

|  | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Domestic Shipments | 100 | 87 | 106 | 103 | 98 |
| Less Exports | 100 | 14 | 11 | 152 | 70 |
| Net Domestic Shipments | 100 | 89 | 109 | 102 | 99 |
| Imports | 100 | 83 | 67 | 118 | 179 |
| Apparent Canadian Market | 100 | 88 | 98 | 106 | 119 |
| Share of Market held by |  |  |  |  |  |
| Net Domestic Shipments | 100 | 101 | 111 | 96 | 83 |
| Imports | 100 | 96 | 68 | 112 | 152 |

(1) Indexed to retain confidentiality

## POLYESTER YARNS

## IMPORTS

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| LOW-COST |  | --- '000 kilos --- |  |  |  |
| Taiwan | 188 | 246 | 77 | 68 | 24 |
| Hong Kong | 10 | 86 | 5 | 59 | 11 |
| Thailand | - | - | - | - | 1 |
| Singapore | - | neg | 12 | 18 |  |
| Korea, R. of | - | - | , | 12 |  |
| Chile | - | - | - | 2 |  |
| Costa Rica | - | - | - | neg |  |
| China, P. R. of | - | neg | - | - |  |
| Puerto Rico | - | 11 | - | - | - |
| Total Low-Cost | 198 | 344 | 96 | 159 | 36 |

DEVELOPED
U.S.A.
Italy
Germany, West
United Kingdom
Japan
Switzerland
France
Ireland
Austria
Netherlands
Belgium-Lux.
Denmark
South Africa
Norway
Sweden

| 3,611 | 4,537 |
| ---: | ---: |
| 105 | 92 |
| 1,480 | 753 |
| 161 | 66 |
| 348 | 538 |
| 2,455 | 1,409 |
| 745 | 117 |
| neg | - |
| 328 | 149 |
| 1 | 7 |
| 6 | 20 |
| 162 | - |
| - | - |
| neg | neg |
| neg | - |

Total Developed
9,401

$$
7,689
$$

$$
6,407
$$

$$
11,010
$$

$$
17,161
$$

## OTHER

Spain
Greece $\quad 15$ in

## DEFINITION

Polyester fabrics are those fabrics in which the warp is composed of polyester filament yarns.

## SECTOR PROFILE

- There are seven firms manufacturing polyester filament fabrics in Canada.
- Six plants are located in Québec and four in Ontario. Approximately 90 percent of domestic production of these fabrics comes from three firms.
- Employment in this sector in 1979 was at about the same level as in 1978, i.e., 900.
- The polyester fabric market has shown the most rapid growth among all fibres since 1974, growing by 84 percent to a level of $96,878,000$ square metres in 1979 .
- Domestic shipments increased by 43 percent in 1979 over 1978 and market share held by domestic manufacturers increased from 38.1 percent to 47.4 percent over the same period.
- Imports in 1979 held at almost the same level as in 1978.


## POLYESTER FABRICS

## INDEX ${ }^{(1)}$

$1975=100$

## APPARENT CANADIAN MARKET

|  | $\underline{1975}$ | $\underline{1976}$ | $\underline{1977}$ | $\underline{1978}$ | $\underline{1979}$ |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Domestic Shipments | 100 | 130 | 137 | 193 | 271 |
| Less Exports | 100 | 362 | 33 | 55 | 147 |
| Net Domestic Shipments | 100 | 122 | 140 | 198 | 276 |
| Imports | 100 | 133 | 132 | 118 | 119 |
| Apparent Canadian Market | 100 | 130 | 134 | 139 | 160 |

Share of Market held by

| Net Domestic Shipments | 100 | 92 | 104 | 142 | 173 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Imports | 100 | 103 | 99 | 85 | 74 |

(1) Indexed to retain confidentiality

IMPORTS
$\underline{\text { SOURCE }} \underline{1975}$
LOW-COST
Korea, R. of
Poland
Thailand
Indonesia
Taiwan
Hong Kong
Brazil
Singapore
India
Czechoslovakia
Germany, Eact
Kuwait
Malaysia
China, P. R. of
Philippines
Bahamas
El Salvador
Trinidad \& Tobago
Panama

Total Low-Cost

DEVELOPED

| U.S.A. | 1,502 |
| :--- | ---: |
| Japan | 1,907 |
| Italy | 132 |
| France | 259 |
| Ireland | neg |
| Germany, West | 107 |
| Switzerland | 73 |
| Austria | 8 |
| United Kingdom | 10 |
| Belgium-Lux. | neg |
| Norway | neg |
| Netherlands | 2 |
| Sweden | 7 |
| Finland | 2 |
| Denmark | neg |
| South Africa | - |
| Australia | neg |
| Total Developed | $4,0 l l$ |


| 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: |
| --- '000 kilos --- |  |  |  |
| 298 | 254 | 298 | 158 |
| 30 | 38 | 44 | 50 |
| 1 | 2 | 37 | 40 |
| - | - | 8 | 29 |
| 49 | 86 | 21 | 24 |
| 76 | 181 | 1 | 18 |
| 7 | - | 1 | 9 |
| 29 | 1 | 1 | 6 |
| - | - | - | 2 |
| 6 | 3 | 26 |  |
| neg | - | - | - |
| neg | - | - | - |
| - | 5 | 23 | - |
| 1 | 1 | - | - |
| 5 | - | - | - |
| - | - | neg | - |
| 4 | - | 4 | - |
| - | 1 | - | - |
| - | 1 | - | - |
| 508 | 574 | 466 | 336 |

$$
2,512
$$

$$
1,923
$$

349
474
108
90
12
22
5
neg
15

932
413
21
-
44

435
9
-
neg
-
-

$$
2,421
$$

| neg |
| ---: |
| 1 |
| - |
| - |

5,569
13
1
-

- 
- 

号

$$
\begin{aligned}
& 1,502 \\
& \hline
\end{aligned}
$$

$$
\begin{aligned}
& c, 186 \\
& 2,186
\end{aligned}
$$

230
386
-
115
128
10
2
,

## POLYESTER FABRICS

IMPORTS (Continued)


Totals may not add due to rounding.

# COTTON, POLYESTER-COTTON, CORDUROY AND DENIM FABRICS 

## DEFINITION

There are four basic product groupings within the cotton and polyester-cotton fabrics classification.

1) 100 percent cotton
2) polyester-cotton
3) denim
4) corduroy (cotton and polyester-cotton)

Polyester-cotton fabrics are those fabrics which are produced from spun polyester-cotton fibre yarns in which the combined content of polyester and cotton fibres make up 100 percent of the fabrics.

## SECTOR PROFILE

- The cotton and polyester-cotton fabrics industry consists of two large companies and three converters. Two of the converters specialize in finishing corduroy and the third finishes huck towelling for industrial use.
- The five manufacturers of these fabrics operate sixteen plants, twelve of which are in Québec, three in Ontario, and one in New Brunswick.
- Employment in the manufacture of cotton and polyester-cotton fabrics is estimated to have been 8,917 in 1979, up by about 4 percent from 8,590 in 1978.
- The market for these fabrics in Canada grew by 8 percent in 1979 over 1978.
- Domestic shipments increased by 10 percent in 1979 over the previous year.
- Imports increased by 7 percent in 1979 over the previous year, and account for 55 percent of the apparent Canadian market, almost the same share they held in 1978.


## APPARENT CANADIAN MARKET

| Domestic Shipments |  | 163,976 | 164,242 | 171,826 | 189,531 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Less Exports |  | 28,926 | 26,186 | 24,276 | 27,319 |
| Net Domestic Shipments |  | 135,050 | 138,056 | 147,550 | 162,212 |
| Imports |  | 228,804 | 188,888 | 242,509 | 261,104 |
| Apparent Canadian Market | $\mathrm{n} / \mathrm{a}$ | 363,854 | 326,944 | 390,059 | 423,316 |
| Share of Market held by |  | --- percent --- |  |  |  |
| Net Domestic Shipments |  | 37 | 42 | 38 | 38 |
| Imports |  | 63 | 58 | 62 | 62 |

COTTON, POLYESTER-COTTON, CORDUROY AND DENIM FABRICS

## IMPORTS

| SOURCE | $\underline{1975}$ | $\underline{1976}$ | $\underline{1977}$ | $\underline{1978}$ |
| :--- | :--- | :--- | :--- | :--- |
| LOW-COST | _-- '000 kilos --- |  |  |  |


| China, P. R. of | 1,872 | 3,970 | 2,418 | 3,844 | 6,786 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Taiwan | 537 | 992 | 896 | 3,320 | 1,761 |
| Hong Kong | 1,295 | 2,780 | 1,843 | 2,040 | 1,729 |
| Pakistan | 867 | 2,349 | 672 | 1,745 | 1,336 |
| Colombia | 1,045 | 1,821 | 790 | 1,216 | 1,259 |
| Czechoslovakia | 741 | 762 | 725 | 1,153 | 1,076 |
| Malaysia | 3 | 171 | 607 | 1,172 | 981 |
| India | 510 | 1,655 | 1,108 | 1,072 | 867 |
| U.S.S.R. | 864 | 1,224 | 1,160 | 2,209 | 848 |
| Korea, R. of | 345 | 583 | 474 | 733 | 748 |
| Mexico | 1,538 | 1,687 | 1,824 | 702 | 568 |
| Romania | 363 | 1,119 | 677 | 781 | 468 |
| Brazil | 794 | 1,138 | 469 | 374 | 425 |
| Singapore | 291 | 312 | 233 | 361 | 362 |
| Thailand | 188 | 679 | 913 | 484 | 349 |
| Poland | 936 | 1,201 | 781 | 242 | 280 |
| Hungary | 48 | 317 | 289 | 309 | 280 |
| Peru | - | 23 | 67 | 90 | 218 |
| Indonesia | neg | - | neg | 1 | 159 |
| Guatemala | 223 | 289 | 130 | 72 | 117 |
| Philippines | 26 | 59 | 93 | 70 | 30 |
| Cuba | - | - | - | - | 21 |
| Ethiopia | - | - | - | - | neg |
| Kenya | - | - | neg | - | neg |
| St. Pierre et Miq. | - | - | - | neg | neg |
| Bulgaria | 37 | 14 | 18 | - |  |
| Iran | neg | - | - | - | - |
| Iraq | - | - | - | neg | - |
| Yemen, P.D.R. | neg | - | - | - | - |
| Sudan | 崖 | - | neg | - | - |
| Turkey | neg | 10 | - | - | - |
| Egyptian, A.R. | - | neg | - | - | - |
| Argentina | - |  | 43 | 44 | - |
| Ecuador | - | - | 1 | - | - |
| Venezuela | 62 | 135 | 8 | - | - |
| Jamaica | - | - | - | 13 | - |
| El Salvador | neg | 17 | 4 | 1 | - |
| Haiti | 5 | 34 | - | - | - |
| Nicaragua | 179 | 43 | - | , | - |
| Puerto Rico | - | 59 | 11 | 44 | - |
| Ivory Coast | - |  | neg | - | - |
| Bermuda | - | - | neg | - | - |
| U.S. Virgin Is. | - | - | - | neg | - |
| otal Low-Cost | 12,769 | 23,441 | 16,254 | 22,091 | 20,670 |

IMPORTS (Continued)


OTHER


## WOOLLEN FABRICS

## DEFINITION

In opposition to worsted fabrics which are made from fine combed yarns using virgin raw material, woollen fabrics are usually heavier and woven from coarser yarns which can be spun from virgin, regenerated or second grade wool, man-made and hair fibres and are used in a wide variety of blends.

## SECTOR PROFILE

- There are six manufacturers of woollen fabrics in Canada, with the four largest regularly supplying about 95 percent of total industry shipments.
- Five of the six woollen fabric manufacturers are located in small centres in the province of Quebec and the other is located in Ontario.
- Employment in the manufacture of woollen fabrics in 1979 was 1,295, marginally higher than the 1,263 employed in 1978.
- The woollen fabrics market has almost doubled from 1975 to 1979. Most of this growth has been captured by imports, which accounted for 56 percent of the market in 1979.
- Domestic shipments in 1979 were virtually identical to 1978 shipments.
- Imports in 1979 were 32 percent higher than in 1978.


## WOOL AND WOOL BLEND FABRICS (EXCLUDING WORSTEDS)

## APPARENT CANADIAN MARKET

|  | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  |  | --- | square | ers --- |  |
| Domestic Shipments | 10,575 | 11,562 | 12,495 | 12,679 | 12,894 |
| Less Exports | - | - | - | - | - |
| Net Domestic Shipments | 10,575 | 11,562 | 12,495 | 12,679 | 12,894 |
| Imports | 6,233 | 9,066 | 8,064 | 12,476 | 16,414 |
| Apparent Canadian Market | 16,808 | 20,628 | 20,559 | 25,155 | 29,308 |
| Share of Market held by |  |  | percen |  |  |
| Net Domestic Shipments | 63 | 56 | 61 | 50 | 44 |
| Imports | 37 | 44 | 39 | 50 | 56 |

WOOL AND WOOL BLEND FABRICS (EXCLUDING WORSTEDS)

## IMPORTS

| SOURCE |
| :--- |
| LOW-COST |


| Czechoslovakia | 34 | 52 | 13 | 99 | 108 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Uruguay | 7 | 3 | 6 | 28 | 79 |
| India | 1 | 11 | 2 | 2 | 55 |
| Poland | 3 | 51 | 11 | 25 | 46 |
| Argentina | - | neg | 29 | 73 | 40 |
| Brazil | 26 | 6 | neg | 3 | 18 |
| China, P. R. of | 10 | 62 | - | 12 | 9 |
| Mexico | 14 | 5 | 14 | 9 | 4 |
| Romania | neg | 10 | 5 | - | 3 |
| Hungary | - | 3 | - | - | 3 |
| Peru | - | - | - | neg | 1 |
| Hong Kong | - | - | 2 | - | 1 |
| Chile | 1 | 7 | 6 | 1 | neg |
| Colombia | 3 | 13 | 22 | neg | neg |
| Korea, R. of | 9 | 32 | 20 | 58 | - |
| Taiwan | - | 5 | - | neg | - |
| Germany, East | - | 2 | 1 | - | - |
| Malta | - | 12 | - | - | - |
| tal Low-Cost | 108 | 274 | 132 | 311 | 367 |

DEVELOPED

| Italy | 748 | 1,025 | 994 | 1,765 | 2,650 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| United Kingdom | 689 | 924 | 939 | 961 | 1,081 |
| U.S.A. | 89 | 131 | 171 | 342 | 409 |
| France | 57 | 91 | 89 | 126 | 93 |
| Germany, West | 24 | 96 | 58 | 71 | 72 |
| Ireland | 39 | 48 | 50 | 31 | 44 |
| Netherlands | 29 | 45 | 34 | 30 | 31 |
| Switzerland | 4 | 19 | 78 | 9 | 15 |
| Norway | 5 | $n$ | 9 | 18 | 12 |
| Denmark | 60 | $n e g$ | 1 | $n 6$ | 3 |

## IMPORTS (Continued)

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| OTHER |  | --- '000 kilos --- |  |  |  |
| Spain | 107 | 91 | 51 | 54 | 53 |
| Portugal | 2 | 2 | neg | 4 | 48 |
| Yugoslavia | - | - | 3 | 1 | 1 |
| Israel | - | neg | neg | - | - |
| Greece | neg | - | - | - | - |
| Total Other | 109 | 94 | 55 | 59 | ,102 |
| TOTAL ALL SOURCES | 1,982 | 2,829 | 2,561 | 3,793 | 4,900 |

Totals may not add due to rounding.

## DEFINITION

Worsted fabrics are woven fabrics having 17 percent or more by weight of wool made from yarns spun on the worsted system.

## SECTOR PROFILE

- There are seven manufacturers of worsted fabrics, of which two firms accounted for 85 percent of Canadian shipments in 1979.
- Regionally speaking, three firms, including the two largest, are located in Quebec, with three of the remainder in Ontario and one in British Columbia.
- Employment in the manufacturing of worsted fabrics on December 31,1979 was l,329, a decrease of 9 percent from a year earlier.
- The domestic market for these fabrics increased by 6 percent in 1979 over 1978.
- Domestic shipments increased by 4 percent in 1979 compared to 1978.
- Imports increased by 11 percent from 1978 to 1979, with 'lowcost' imports increasing by 16 percent and developed country imports increasing by 48 percent. Most of the latter increase resulted from a 160 percent increase in the volume of Italian fabrics.


## WORSTED FABRICS

## APPARENT CANADIAN MARKET

|  | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  |  | --- ' | square | ers --- |  |
| Domestic Shipments | 10,831 | 12,356 | 11,894 | 12,491 | 12,979 |
| Less Exports | 347 | 188 | 64 | 42 | 42 |
| Net Domestic Shipments | 10,484 | 12,168 | 11,830 | 12,449 | 12,937 |
| Imports | 6,109 | 6,977 | 6,422 | 6,583 | 7,306 |
| Apparent Canadian Market | 16,593 | 19,145 | 18,252 | 19,032 | 20,243 |
| Share of Market held by |  |  | - percen |  |  |
| Net Domestic Shipments | 63 | 64 | 65 | 65 | 64 |
| Imports | 37 | 36 | 35 | 35 | 36 |

## IMPORTS

| SOURCE | 1975. | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| LOW-COST |  | --- '000 kilos --- |  |  |  |
| Korea, R. of | 288 | 233 | 286 | 218 | 253 |
| Czechoslovakia | 28 | 35 | 134 | 119 | 198 |
| India | 74 | 78 | 40 | 131 | 151 |
| China, P. R. of | 3 | 119 | 29 | 46 | 141 |
| Poland | 47 | 135 | 128 | 207 | 105 |
| Argentina | neg | neg | 35 | 4 | 47 |
| Romania | neg | 20 | 42 | 36 | 32 |
| Uruguay | 24 | 29 | 42 | 24 | 27 |
| Hungary | - | - | 7 | neg | 20 |
| Chile | neg | - | neg | 10 | 10 |
| Colombia | 18 | 20 | 29 | 2 | 5 |
| Brazil | 10 | 1 | I | - | 5 |
| Peru | - | neg | - | - | 1 |
| Philippines | - |  | - | - | neg |
| Hong Kong | 4 | 1 | - | 1 | - |
| Taiwan | - | 11 | 10 | 22 | - |
| Mexico | 10 | 10 | 6 | 10 | - |
| Indonesia | - | neg | - | - | - |
| Total Low-Cost | 506 | 693 | 790 | 831 | 995 |

DEVELOPED

| Italy | 100 | 171 | 114 | 116 | 305 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Japan | 545 | 436 | 254 | 276 | 128 |
| U.S.A. | 71 | 54 | 39 | 73 | 98 |
| United Kingdom | 159 | 223 | 243 | 141 | 94 |
| South Africa | 1 | - | 1 | 20 | 59 |
| Germany, West | 16 | 20 | 47 | 37 | 31 |
| France | 12 | 12 | 17 | 18 | 21 |
| Denmark | 4 | - | neg | neg | 5 |
| Netherlands | 17 | 26 | 8 | 6 | 4 |
| Ireland | 2 | 2 | neg | 1 | 3 |
| Austria | 1 | neg | neg | neg | - |
| Belgium-Iux. | 1 | 1 | - | neg | - |
| Finland | neg | 3 | - | - | - |
| Norway | neg | neg | neg | - | - |
| Sweden | 1 | 9 | 2 | neg | - |
| Switzerland | $\underline{n e g}$ | neg | - | - | - |
| Australia |  |  | - | - | - |
| Total Developed | 934 | 958 | 730 | 691 | 748 |


| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| OTHER |  | --- '000 kilos --- |  |  |  |
| Spain | 58 | 72 | 60 | 68 | 39 |
| Portugal | neg | 1 | - | 11 | 29 |
| Yugoslavia | - | - | 4 | 20 | 24 |
| Greece | neg | neg | - | - | - |
| Total Other | 58 | 73 | 64 | 100 | 93 |
| TOTAL ALL SOURCES | 1,499 | 1,724 | 1,585 | 1,623 | 1,837 |

Totals may not add due to rounding.

## DEFINITION

Any fabric in which filament or spun nylon yarns account for 50 percent or more by weight or thread count.

## SECTOR PROFILE

- There are nine Canadian manufacturers of these products.
- These manufacturers operate 16 plants, 13 of which are located in Quebec and 3 of which are located in Ontario.
- Employment in the manufacture of these fabrics has been estimated at approximately 1,275 in both 1978 and 1979.
- The nylon fabrics market has continued to increase at an annual average rate of better than 12 percent since 1974 , and grew by 13.5 percent in 1979 .
- Domestic shipments in 1979 declined slightly from their 1978 level, while the Canadian share of the market fell more steeply, by about 12 percentage points.
- Imports increased by 72 percent in 1979 over 1978.

$$
1975=100
$$

## APPARENT CANADIAN MARKET

|  | $\underline{1975}$ | $\underline{1976}$ | $\underline{1977}$ | $\underline{1978}$ | 1979 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Domestic Shipments | 100 | 105 | 135 | 175 | 171 |
| Less Exports | 100 | 73 | 129 | 100 | 108 |
| Net Domestic Shipments | 100 | 110 | 136 | 184 | 179 |
| Imports | 1.00 | 130 | 115 | 82 | 142 |
| Apparent Canadian Market | 100 | 118 | 128 | 145 | 165 |
|  |  |  |  |  |  |
| Share of Market held by |  |  |  |  |  |
| Net Domestic Shipments | 100 | 100 | 113 | 92 | 58 |
| Imports |  |  | 105 | 108 |  |

(1) Indexed to retain confidentiality

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| LOW-COST | --- '000 kiles --- |  |  |  |  |
| Romania | - | - | - | - | 151 |
| Poland | 11 | 108 | 83 | 18 | 84 |
| Korea, R. of | 57 | 15 | 20 | 20 | 44 |
| Hong Kong | 7 | 1 | 3 | 3 | 33 |
| Taiwan | 15 | 3 | 10 | 29 | 29 |
| Hungary | - | - | - | - | 11 |
| Czechoslovakia | - | - | - | - | 4 |
| India | neg | neg | 2 | - | neg |
| Singapore | - | neg | neg | - | neg |
| Philippines | - | - | - | 8 | - |
| China, P. R. of | - | 8 | 9 | 3 | - |
| Barbados | - | - | neg | - | - |
| Total Low-Cost | 90 | 135 | 127 | 79 | 357 |

DEVELOPED

| U.S.A. | 901 | 1,156 | 891 | 589 | 1,102 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Japan | 350 | 328 | 376 | 221 | 344 |
| Italy | 10 | 116 | 52 | 55 | 267 |
| United Kingdom | 195 | 319 | 322 | 323 | 169 |
| Switzerland | 9 | 6 | 34 | 28 | 25 |
| France | 4 | 4 | 10 | 11 | 18 |
| Germany, West | 15 | 5 | 1 | 7 | 12 |
| Austria | 2 | - | 5 | 5 | 2 |
| Belgium-Lux. | 25 | 39 | 33 | 6 | neg |
| Finland | - | - | - | - | neg |
| Netherlands | neg | 1 | 2 | 9 |  |
| Sweden | neg | 2 | neg | - |  |
| Ireland | - | neg | neg | - | - |
| Norway | neg |  | neg | - | - |
| Denmark | 5 | - | - | - | - |
| Total Developed | 1,516 | 1,976 | 1,726 | 1,255 | 1,940 |
| OTHER |  |  |  |  |  |
| Spain | neg | neg | - | - | 1. |
| TOTAL ALL SOURCES | 1,607 | 2,112 | 1,852 | 1,334 | 2,297 |

## DEFINITION

For purposes of identification, the Textile and Consumer Products Branch uses the following Statistics Canada Import Commodity classes to define these products:

374-49 - Broadwoven fabric of one vegetable fibre n.e.s.
375-09 - Pile fabrics broadwoven one man-made fibre
375-19 - Rayon broadwoven fabric
375-99 - Broadwoven fabrics one man-made fibre n.e.s.
377-59 - Pile fabrics broadwoven man-made mixture
377-65 - Rayon - polyester broadwoven fabrics n.e.s.
377-67 - Rayon man-made mixture broadwoven fabrics n.e.s.
377-69 - Rayon mixture broadwoven fabrics n.e.s.
377-79 - Broadwoven man-made mixture fabrics n.e.s.
377-89 - Broadwoven fabrics, mixed fibres, n.e.s.

## SECTOR PROFILE

- There are 18 Canadian manufacturers of these products.
- Eleven firms are located in Quebec, six in Ontario and one in New Brunswick.
- It is estimated that 2,900 people are involved in the production of the fabrics produced in this sector.
- The market for these fabrics increased by 21 percent in 1979 over l978, with most of the growth occurring in demand for mixed fibres fabrics and pile fabrics.
- Canadian shipments of these fabrics increased by 29 percent from 1978 to 1979.
- Imports of these fabrics grew by 12 percent in 1979 over their 1978 level.


## RAYON FABRICS

## APPARENT CANADIAN MARKET



## RAYON FABRICS

IMPORTS

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| LOW-COST | --- '000 kilos --- |  |  |  |  |
| India | 104 | 336 | 201 | 362 | 194 |
| Romania | 5 | 42 | 33 | 20 | 76 |
| Czechoslovakia | 95 | 115 | 84 | 64 | 74 |
| Poland | 45 | 26 | 34 | 6 | 51 |
| Taiwan | 110 | 177 | 84 | 114 | 26 |
| Korea, R. of | 31 | 13 | 25 | 22 | 5 |
| Hungary | - | - | 3 | 8 | 4 |
| Hong Kong | neg | neg | 6 | 2 | 4 |
| Brazil | 5 | 8 | neg | 5 | 2 |
| China, P. R. of | neg | 18 | neg | neg | neg |
| Colombia | - | - | neg | 1 | - |
| Total Low-Cost | 396 | 736 | 471 | 602 | 438 |

DEVELOPED

| U.S.A. | 1,073 | 1,542 | 1,256 | 1,031 | 922 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Italy | 32 | 58 | 38 | 86 | 90 |
| Japan | 63 | 50 | 44 | 54 | 44 |
| United Kingdom | 34 | 123 | 73 | 71 | 29 |
| Germany, West | 15 | 33 | 27 | 29 | 21 |
| France | 5 | 19 | 13 | 33 | 18 |
| Ireland | 3 | 9 | 8 | 5 | 13 |
| Belgium-Lux. | 34 | 59 | 34 | 17 | 6 |
| Switzerland | 3 | 3 | 2 | 3 | 3 |
| Netherlands | 15 | 6 | 3 | 5 | 2 |
| Austria | 9 | 8 | 2 | 2 | 1 |
| New Zealand | - | - | - | - | 1 |
| Denmark | neg | 2 | neg | 2 | neg |
| Sweden | neg | neg | 5 | 1 |  |
| South Africa | - | - | - | neg | - |
| Finland | neg | - | - | - | - |
| Total Developed | 1,286 | 1,912 | 1,505 | 1,340 | 1,150 |

## RAYON FABRICS

## IMPORTS (Continued)

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| OTHER |  | --- '000 kilos --- |  |  |  |
| Spain | 10 | 1 | 1 | 3 | 5 |
| Portugal | 2 | 1 | neg | 2 | 5 |
| Yugoslavia | 26 | 32 | 8 | 29 | 4 |
| Israel | - | 2 | - | - | - |
| Total Other | 38 | 35 | 10 | 34 | 13 |
| TOTAL ALL SOURCES | 1,722 | 2,683 | 1,987 | 1,977 | 1,602 |

Totals may not add due to rounding.

## MIXED FIBRE FABRICS

## APPARENT CANADIAN MARKET



## IMPORTS

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| LOW-COST |  |  |  |  |  |


| China, P. R. of | 14 | 35 | 6 | 50 | 551 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Poland | 119 | 220 | 293 | 319 | 433 |
| Czechoslovakia | 66 | 96 | 77 | 163 | 342 |
| Taiwan | 14 | 48 | 210 | 319 | 279 |
| Korea, R. of | 33 | 60 | 70 | 271 | 127 |
| Thailand | 2 | 7 | 5 | 23 | 73 |
| Mexico | 65 | 88 | 34 | 11 | 19 |
| Brazil | 82 | 115 | 37 | 16 | 15 |
| Hungary | - | 15 | 21 | 14 | 14 |
| Bermuda | - | - | neg | - |  |
| India | 8 | 27 | 57 | 22 | 8 |
| Indonesia | - | - | - | - | 8 |
| Philippines | - | 5 | 1 | - | 8 |
| Romania | 33 | 59 | 50 | 30 |  |
| Peru | - | - | - | - |  |
| El Salvador | 68 | 37 | 11 | 10 |  |
| Singapore | - | - | - | - |  |
| Hong Kong | 3 | neg | 3 | neg | neg |
| Malaysia | - | 3 | 10 | 3 |  |
| Argentina | - | - | 1 | 2 |  |
| Guatemala | - | 2 | - | - |  |
| Colombia | - | neg | neg | - |  |
| Bolivia | - | - | neg | - |  |
| otal Low-Cost | 508 | 817 | 888 | 252 | 897 |

DEVELOPED

| U.S.A. | 5,537 | 5,638 | 4,554 | 5,549 | 6,832 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Japan | 789 | 1,266 | 2,808 | 1,754 | 1,025 |
| Italy | 217 | 431 | 260 | 600 | -631 |
| Germany, West | 149 | 228 | 218 | 180 | 309 |
| United Kingdom | 137 | 173 | 132 | 111 | 174 |
| France | 101 | 172 | 117 | 173 | 114 |
| Netherlands | 53 | 78 | 62 | - 54 | - 52 |
| Austria | 20 | 44 | 34 | 38 | 35 |
| Belgium-Lux. | 64 | 105 | 53 | 27 | 32 |
| Sweden | 39 | 34 | 27 | 38 | 21 |
| Switzerland | 28 | 88 | 53 | 30 | 19 |
| Ireland | 2 | - | 2 | 1 | 8 |
| Norway | 2 | 7 | 2 | 1 | 6 |
| Denmark | 5 | 5 | 11 | 8 | 5 |
| Finland | 17 | 12 | 10 | 3 | 4 |
| South Africa | neg | neg | 2 | 1 | neg |
| Australia | neg | - | - | - | neg |
| Total Developed | 7,161 | 8,231 | 8,345 | 8,568 | 9,269 |
|  |  | 49 |  |  | inued) |

## MIXED FIBRE FABRICS

## IMPORTS (Continued)

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| OTHER |  | --- '000 kilos --- |  |  |  |
| Portugal | 31 | 186 | 146 | 90 | 227 |
| Spain | 127 | 94 | 82 | 88 | 93 |
| Yugoslavia | - | - | 8 | neg | 6 |
| Israel | neg | - | 1 | - | 1 |
| Greece | 1 | - | - - | - | - |
| Total Other | 159 | 281 | 237 | 178 | 327 |
| TOTAL ALL SOURCES | 7,827 | 9,328 | 9,472 | 9,998 | 11,494 |

Totals may not add due to rounding.

## PILE FABRICS

(EXCLUDING COTTON PILE FABRICS, AND POLYESTER-COTTON CORDUROYS)

INDEX ${ }^{(1)}$
$1976=100$

## APPARENT CANADIAN MARKET

|  | $\underline{1975}$ | $\underline{1976}$ | $\underline{1977}$ | $\underline{1978}$ | $\underline{1979}$ |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Domestic Shipments | 100 | 69 | 78 | 93 |  |
| Less Exports | 100 | 115 | 133 | 171 |  |
| Net Domestic Shipments | 100 | 69 | 77 | 91 |  |
| Imports | 100 | 98 | 54 | 75 |  |
| Apparent Canadian Market | 100 | 85 | 64 | 82 |  |
|  |  |  |  |  |  |
| Share of Market held by | 100 | 80 | 120 | 109 |  |
| Net Domestic Shipments | 100 | 116 | 84 | 93 |  |

(1) Indexed to retain confidentiality

## PILE FABRICS

(EXCLUDING COTTON PILE FABRICS AND POLYESTER-COTTON CORDUROYS)

## IMPORTS

SOURCE $1975 \quad \underline{1976} \quad \underline{1977} \quad \underline{1978}$

| Hong Kong | neg | - | 3 | - | 175 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Poland | 58 | 84 | 144 | 150 | 141 |
| Czechoslovakia | 72 | 136 | 121 | 134 | 88 |
| Korea, R. of | - | - | - | - | 35 |
| Peru | - | - | - | - | 10 |
| Hungary | - | - | - | - | 1 |
| India | 1 | 1 | neg | - | neg |
| Thailand | - | - |  | 5 | - |
| Puerto Rico | - | - | - | 2 | - |
| Taiwan | - | - | 5 | - | - |
| Colombia | - | 17 | - | - | - |
| Romania | 7 | 14 | - | - | - |
| Brazil | 3 | neg | - | - | - |
| Malaysia | - | - | - | neg | - |
| Neth. Antilles | - | - | neg | - | - |
| tal Low-Cost | 141 | 253 | 272 | 291 | 450 |

DEVELOPED

| U.S.A. | 1,781 | 2,586 | 2,600 | 2,553 | 4,717 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Japan | 186 | 328 | 435 | 500 | 282 |
| Belgium-Lux. | 521 | 527 | 310 | 170 | 85 |
| Italy | 8 | 54 | 58 | 57 | 69 |
| France | 39 | 35 | 39 | 24 | 32 |
| Germany, West | 58 | 54 | 74 | 18 | 20 |
| Netherlands | 17 | 22 | 12 | 18 | 11 |
| United Kingdom | 5 | 3 | 6 | 4 | 2 |
| Sweden | - | 3 | - | neg | neg |
| Norway | - | 1 | - | - | neg |
| Switzerland | neg | 3 | - | - | 7 |
| Austria | neg | - | - | - | - |
| Denmark | - | $-n e g$ | - | neg | - |
| Finland | - | - | - | - |  |
| Total Developed | 2,619 | 3,613 | 3,534 | 3,351 | 5,219 |

PILE FABRICS
(EXCLUDING COTTON PILE FABRICS, AND POLYESTER-COTTON CORDUROYS)

IMPORTS (Continued)

| SOURCE | 1975 | 1976 | 1977 | $\underline{1978}$ | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| OTHER |  | --- '000 kilos' --- |  |  |  |
| Spain | 2 | 3 | 2 | 34 | 26 |
| Israel | - | 1 | 1 | - | - |
| Portugal | - | - | - | neg | - |
| Total Other | 2 | 4 | 3 | 34 | 26 |
| TOTAL ALL SOURCES | 2,761 | 3,870 | 3,809 | 3,676 | 5,694 |
| Less Polyester/Cotton |  |  |  |  |  |
| Corduroy |  |  |  |  |  |
| CITC 377-59-40 | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | 632 | 905 |
| CITC 377-59-50 | n/a | n/a | n/a | 956 | 1,874 |
| motal PILE FABRICS | 2,761 | 3,870 | 3,809 | 2,087 | 2,915 |

Totals may not add due to rounding.

## DEFINITION

The terms coated fabrics or laminated fabrics refer to fabrics to which polymeric materials are applied as a surface film to a fabric substrate as backing. The substrate can be either woven, knitted or nonwoven fabrics of cotton, man-made fibre or paper. The polymeric materials mostly used are polyvinyl chloride and polyurethane.

## SECTOR PROFILE

- There are seven Canadian manufacturers of these products. The four largest firms accounted for 92 percent of the total industry output in 1978.
- Four firms are located in Ontario, where they operate 5 plants. The remaining three firms are one-plant operations and are located in Quebec.
- Employment in the firms manufacturing coated fabrics was approximately l,400 at the end of 1979, an increase of 38 over the 1978 level of 1,362 .
- The coated fabric market in 1979 was essentially unchanged from 1978.
- Domestic shipments were also virtually unchanged in 1979 from their 1978 levels, with domestic suppliers continuing to hold about 58 percent of the market.
- Imports of polyurethane fabrics grew slightly in 1979 over 1978, while imports of vinyl fabrics decreased fractionally in 1979 from their 1978 levels.


## COATED FABRICS

## APPARENT CANADIAN MARKET

|  | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  |  | --- | squäre | rs --- |  |
| Domestic Shipments | 28,052 | 31,897 | 31,208 | 34,574 | 34,850 |
| Less Exports | 4,300 | 4,842 | 4,817 | 5,454 | 5,500 |
| Net Domestic Shipments | 23,752 | 27,055 | 26,391 | 29,120 | 29,350 |
| Imports | 26,433 | 25,770 | 25,750 | 27,359 | 27,807 |
| Apparent Canadian Market | 50,185 | 52,825 | 52,141 | 56,479 | 57,157 |
| Share of Market held by |  |  | percen |  |  |
| Net Domestic Shipments | 47 | 51 | 51 | 52 | 51 |
| Imports | 53 | 49 | 49 | 48 | 49 |

## COATED FABRICS



## DEVELOPED

| U.S.A. | 13,697 | 13,208 | 12,557 | 12,198 | 12,329 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| United Kingdom | 717 | 465 | 580 | 1,039 | 751 |
| Italy | 145 | 190 | 181 | 194 | 395 |
| Japan | 407 | 453 | 512 | 472 | 305 |
| Germany, West | 236 | 233 | 219 | 198 | 244 |
| France | 67 | 107 | 73 | 46 | 57 |
| Belgium-Lux. | 20 | 25 | 17 | 24 | 34 |
| Switzerland | 2 | neg | 6 | 27 | 34 |
| Netherlands | 1 | 10 | 9 | 12 | 21 |
| Finland | neg | 1 | 2 | , | 2 |
| Sweden | 2 | 1 | 1 | 3 | 2 |
| Australia | - | - | - | neg | neg |
| Ireland | - | - | - | - | neg |
| Denmark | - | - | 1 | 11 | - |
| Norway | - | - | - | 2 | - |
| Otal Developed | 15,294 | 14,694 | 14,158 | 14,227 | 14,175 |
| OTHER |  |  |  |  |  |
| Spain | 67 | 114 | 97 | 191 | 246 |
| TOTAL ALL SOURCES | 15,433 | 14,897 | 14,586 | 15,150 | 15,246 |

Totals may not add due to rounding.

## APPARENT CANADIAN MARKET

|  | $\underline{1975}$ | $\underline{1976}$ | $\underline{1977}$ | $\underline{1978}$ | $\frac{1979}{}$ |
| :--- | :---: | :---: | :---: | :---: | :---: |
| Domestic Shipments | 100 | 114 | 112 | 125 | 126 |
| Less Exports | 100 | 113 | 112 | 127 | 128 |
| Net Domestic Shipments | 100 | 115 | 112 | 124 | 126 |
| Imports | 100 | 95 | 91 | 92 | 91 |
| Apparent Canadian Market | 100 | 105 | 101 | 107 | 108 |
| Share of Market held by |  |  |  |  | 114 |

(1) Indexed to retain confidentiality

## VINYL COATED FABRICS

## IMPORTS



DEVELOPED

| U.S.A. | 13,437 | 12,887 | 12,019 | 11,477 | 11,575 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| United Kingdom | 711 | 447 | 543 | 1,003 | 704 |
| Japan | 326 | 364 | 392 | 334 | 174 |
| Germany, West | 144 | 147 | 162 | 110 | 117 |
| Italy | 73 | 127 | 51 | 52 | 76 |
| France | 24 | 23 | 18 | 42 | 56 |
| Switzerland | 2 | - | 6 | 27 | 34 |
| Belgium-Lux. | 4 | 13 | 6 | 24 | 29 |
| Netherlands | 1 | 7 | 8 | 12 | 21 |
| Finland | neg | 1 | neg | 1 | 2 |
| Sweden | 2 | 1 | 1 | 2 | neg |
| Australia | - | - | - | neg | neg |
| Ireland | - | - | - | - | neg |
| Denmark | - | - | 1 | 11 | - |
| Norway | - | - | - | 2 | - |
| Total Developed | 14,722 | 14,018 | 13,207 | 13,098 | 12,789 |
| OTHER |  |  |  |  |  |
| Spain | neg | 4 | 12 | 64 | 63 |
| TOTAL ALL SOURCES | 14,794 | 14,102 | 13,446 | 13,539 | 13,433 |

[^1]
# index ${ }^{(1)}$ <br> $1975=100$ 

## APPARENT CANADIAN MARKET

|  | $\underline{1975}$ | $\underline{1976}$ | $\underline{1977}$ | $\underline{1978}$ | $\underline{1979}$ |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Domestic Shipments | 100 | 89 | 65 | 53 | 34 |
| Less Exports | - | - | - | - | - |
| Net Domestic Shipments | 100 | 89 | 65 | 53 | 34 |
| Imports | 100 | 124 | 178 | 252 | 284 |
| Apparent Canadian Market | 100 | 116 | 152 | 207 | 226 |

Share of Market held by

| Net Domestic Shipments | 100 | 78 | 43 | 26 | 13 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Imports | 100 | 106 | 117 | 122 | 126 |

(1) Indexed to retain confidentiality

## IMPORTS

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| LOW-COST | --- '000 kilos --- |  |  |  |  |
| Hungary | - | - | 77 | 309 | 210 |
| Taiwan | - | - | 19 | 36 | 36 |
| Korea, R. of | 1 | 6 | 5 | 10 |  |
| Mexico | - | - | , | - |  |
| Hong Kong | neg | - | - | 二 | - |
| Total Low-Cost | 1 | 6 | 104 | 356 | 246 |

DEVELOPED

| U.S.A. | 261 | 321 | 539 | 721 | 754 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Italy | 73 | 64 | 130 | 142 | 319 |
| Japan | 81 | 88 | 119 | 138 | 131 |
| Germany, West | 92 | 86 | 57 | 88 | 127 |
| United Kingdom | 6 | 19 | 37 | 35 | 47 |
| Belgium-Lux. | 16 | 12 | 12 | neg | 5 |
| France | 43 | 84 | 55 | 4 | 1 |
| Sweden | neg | - | - | neg | 1 |
| Netherlands |  | 3 | 1 | - | neg |
| Switzerland | neg | neg | neg | neg | - |
| Finland | - |  | 1 | - | - |
| Cotal Developed | 571 | 677 | 951 | 1,129 | 1,385 |
| OTHER |  |  |  |  |  |
| Spain | 67 | 110 | 85 | 127 | 183 |
| TOTAL ALL SOURCES | 639 | 795 | 1,140 | 1,612 | 1,814 |

Totals may not add due to rounding.

## DEFINITION

Warp-knit fabric is the generic term for flat or open width fabrics produced on tricot, Rachel or simplex machines by feeding numberous ends of yarn from warps or beams longitudinally to a series of needles arrayed in a lateral formation, each end of the warp yarn being fed to an individual needle.

## SECTOR PROFILE

- There were fourteen Canadian firms manufacturing warp-knit fabrics, with the five major firms accounting for 78 percent of production in 1979.
- Nine firms were located in Quebec and five in Ontario. One company in Quebec ceased production in late 1979 but data relevant to that company is included in the figures presented on this sector.
- Employment in the industry increased from 894 in 1978 to 1,028 in 1979, an increase of 15 percent. The company which ceased operations in 1979 was not a major employer.
- The warp-knit fabric market increased by 15 percent in 1979 over 1978, rising to a record level since 1969.
- Domestic shipments increased by 6 percent in 1979 over 1978, and accounted for 82.5 percent of the market.
- Imports increased by 91.4 percent in 1979 over 1978, and increased their market share by over 7 percentage points.


## WARP-KNIT FABRICS

## APPARENT CANADIAN MARKET

|  | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  |  |  | '000 kilos | --- |  |
| Domestic Shipments | 8,024 | 8,191 | 7,778 | 9,328 | 9,964 |
| Less Exports | 106 | 35 | 160 | 133 | 301 |
| Net Domestic Shipments | 7,918 | 8,156 | 7,618 | 9,195 | 9,663 |
| Imports | 3,196 | 2,912 | 2,463 | 1,209 | 2,314 |
| Apparent Canadian Market | 11,114 | 11,068 | 10,081 | 10,404 | 11,977 |
| Share of Market held by |  |  | - percent |  |  |
| Net Domestic Shipments | 71 | 74 | 76 | 88 | 81 |
| Imports | 29 | 26 | 24 | 12 | 19 |

IMPORTS

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| LOW-COST | --- '000 kilos --- |  |  |  |  |
| Malta | 7 | 20 | 12 | 20 | 8 |
| Korea, R. of | 1 | - | 3 | 6 | 2 |
| Taiwan | 4 | - | 36 | - | 2 |
| Hong Kong | 5 | neg | neg | - | neg |
| Poland | - | - | - | - | neg |
| Singapore | 1 | 5 | 11 | - | - |
| Barbados | - | - | 9 | - | - |
| India | - | 8 | - | - | - |
| Hungary | - | 5 | - | - | - |
| Malaysia | - | 4 | - | - | - |
| Philippines | - | 1 | - | - | - |
| Moroceo | - | 1 | - | - | - |
| Bolivia | - | neg | - | - | - |
| U.S. Virgin Is. | - | neg | - | - | - |
| Brazil | neg | - | - | - | - |
| Total Low-Cost | 20 | 45 | 72 | 26 | 13 |

DEVELOPED

| U.S.A. | 2,003 |
| :--- | ---: |
| Japan | 929 |
| United Kingdom | 67 |
| Germany, West | 77 |
| Italy | 44 |
| France | 15 |
| Norway | - |
| Austria | 1 |
| Netherlands | 2 |
| Switzerland | 4 |
| Sweden | 13 |
| Australia | - |
| Belgium-Lux. | neg |
| South Africa | - |
| Ireland | neg |
|  |  |
| Total Developed | 3,154 |

## WARP-KNIT FABRICS

IMPORTS (Continued)

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| OTHER |  | --_ '000 kilos --- |  |  |  |
| Spain | 22 | 51 | 32 | 6 | 13 |
| Israel | - | - | - | neg | - |
| Portugal | neg | - | - | - | - |
| Total Other | 23 | 51 | 32 | 7 | 13 |
| TOTAL ALL SOURCES | 3,196 | 2,912 | 2,463 | 1,209 | 2,314 |

Totals may not add due to rounding.

## DEFINITION

Towels and washcloths are made of fabrics woven on terry looms using single or plied cotton or blend yarns, with loop pile on one or both sides covering the entire surface or part of the surface to form designs or patterns such as stripes, checks, etc., whether greige, bleached, dyed or printed. Towels are normally made in rectangular form and range in size up to approximately 91 centimetres in width and 182 centimetres in length. Depending on size, towels are designated frequently as tea, hand or bath towels, or bath sheets. Washcloths are normally made in square or rectangular form ranging in size from 323 square centimetres to l,090 square centimetres.

## SECTOR PROFILE

- There are three Canadian manufacturers of these products.
- Two firms are located in Ontario and one is in Québec.
- Employment in this sector was approximately 900 at December 31, 1979, compared to 962 at the same time in 1978.
- The market for these goods increased by almost 4 percent in 1979 over 1978.
- Domestic shipments rose by almost 7 percent from 1978 to 1979, and market share held by domestic manufacturers increased slightly to 65 percent.
- Imports in 1979 were down fractionally from their 1978 level.


## TERRY TOWELS, WASHCLOTHS AND SETS, EXCLUDING BATH MATS

## APPARENT CANADIAN MARKET

|  | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | --- '000 kilos --- |  |  |  |  |
| Domestic Shipments | 3,402 | 3,468 | 2,981 | 4,246 | 4,553 |
| Less Exports | - | n/a | n/a | n/a | 26 |
| Net Domestic Shipments | 3,402 | 3,468 | 2,981 | 4,246 | 4,527 |
| Imports | 2,168 | 3,412 | 2,567 | 2,477 | 2,440 |
| Apparent Canadian Market | 5,570 | 6,880 | 5,548 | 6,723 | 6,967 |
| Share of Market held by |  |  | percen |  |  |
| Net Domestic Shipments | 61 | 50 | 54 | 63 | 65 |
| Imports | 39 | 50 | 46 | 37 | 35 |

## TERRY TOWELS, WASHCLOTHS AND SETS EXCLUDING BATH MATS

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| LOW-COST | --- '000 kilos --- |  |  |  |  |
| China, P. R. of | 582 | 1,029 | 1,070 | 661 | 832 |
| Poland | 228 | 581 | 371 | 415 | 416 |
| Pakistan | 136 | 159 | 76 | 146 | 242 |
| Czechoslovakia | 23 | 74 | 82 | 139 | 147 |
| Brazil | 49 | 154 | 70 | 110 | 120 |
| India | 95 | 93 | 178 | 328 | 111 |
| Hong Kong | 77 | 214 | 159 | 176 | 102 |
| Korea, R. of | 57 | 157 | 79 | 44 | 47 |
| Taiwan | 124 | 129 | 53 | 83 | 35 |
| Thailand | - | 45 | 10 | 22 | 19 |
| El Salvador | 27 | 50 | 49 | 22 | 11 |
| Argentina | - | - | - | 2 | neg |
| Romania | 4 | - | - | 2 | - |
| Singapore | - | 14 | - | - | - |
| Korea, North | - | 7 | - | - | - |
| Total Low-Cost | 1,402 | 2,705 | 2,197 | 2,150 | 2,082 |

DEVELOPED

| U.S.A. | 686 | 606 | 312 | 279 | 322 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Italy | 13 | 20 | 15 | 26 | 26 |
| Japan | 60 | 66 | 24 | 5 | 5 |
| Germany, West | 3 | 1 | neg | 1 | 1 |
| Belgium-Lux. | neg | 3 | 5 | 1 | 1 |
| France | 1 | neg | 5 | neg | 1 |
| United Kingdom | neg | 3 | 2 | 3 | neg |
| Switzerland | - | - | - | - | neg |
| Netherlands | 1 | 2 | 1 | neg | neg |
| Finland | neg | 1 | neg | neg | neg |
| Ireland | 1 | neg |  |  |  |
| Denmark | neg | - | - | - | neg |
| South Africa | - | - | - | - |  |
| Australia | - | neg | neg | - |  |
| New Zealand |  | - | - | - |  |
|  |  |  |  |  | - |
| Total Developed | 766 |  |  |  |  |

## TERRY TOWELS, WASHCLOTHS AND SETS <br> EXCLUDING BATH MATS

## IMPORTS (Continued)

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| OTHER |  | --- '000 kilos --- |  |  |  |
| Portugal | - | 3 | neg | 1 | 1 |
| Spain | 1 | 1 | 2 | 8 | - |
| Israel | - | - | neg | - | - |
| Total Other | 1 | 5 | 3 | 9 | 1 |
| TOTAL ALI SOURCES | 2,168 | 3,412 | 2,567 | 2,477 | 2,440 |

Totals may not add due to rounding.

## DEFINITION

Bedsheets and pillowcases are made of woven fabric of cotton or man-made yarns or blends thereof and include flannelette sheets and/or blankets. Bedsheets can be flat or fitted for a number of bed sizes, e.g. king size, queen size, double, twin and single.

## SECTOR PROFILE

- There are only two firms manufacturing these products in Canada.
- Both of these firms are located in Quebec, where one firm has one plant producing these products, and the other has three plants producing the same types of goods.
- Employment in this sector is estimated to have been 2,130 at the end of 1979, which is unchanged from the June 30 , 1979 employment estimate, and compares to estimated employment of about 1,992 people at December 31, 1977.
- The market for these products in Canada has grown by one percent and 9 percent for bedsheets and pillowcases, respectively, in 1979 over 1978.
- During the same period, domestic shipments of bedsheets and pillowcases grew by 9 percent and 7 percent, respectively. Domestic manufacturers held 77 percent of the market for bedsheets and 60 percent of the market for pillowcases, in 1979.
- Imports of both bedsheets and pillowcases declined in 1979 over 1978.


## SHEETS, BED

## APPARENT CANADIAN MARKET



IMPORTS

| SOURCE | 1975 | 1976 | 1977 | $\underline{1978}$ | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| LOW-COST | --- '000 units --- |  |  |  |  |
| Hong Kong | 242 | 749 | 640 | 266 | 309 |
| China, P. R. of | 203 | 573 | 255 | 380 | 298 |
| Poland | 137 | 395 | 70 | 420 | 204 |
| Pakistan | 1 | 4 | - | 1 | 30 |
| India | 186 | 73 | 47 | 70 | 14 |
| Romania | - | - | - | 77 | - |
| Singapore | 1 | neg | - | 1 | - |
| Taiwan | 1,244 | 2,941 | 1,073 | 246 | - |
| Viet Nam | - | - | - | neg | - |
| Brazil | 1 | - | - | neg | - |
| Malaysia |  | - | neg | - | - |
| Total Low-Cost | 2,014 | 4,735 | 2,085 | 1,461 | 855 |

DEVELOPED

| U.S.A. | 3,970 | 3,790 | 3,063 | 2,712 | 2,465 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Italy | 37 | 24 | 29 | 25 | 28 |
| United Kingdom | 13 | 12 | 5 |  | 5 |
| Japan | 355 | 211 | neg | neg | 1 |
| Sweden | - | - |  |  | 1 |
| Switzerland | - | - | - | - | neg |
| France | neg | 1 | neg | - | neg |
| Germany, West | neg | neg | 1 | - | neg |
| Denmark | - | - | 1 | - | - |
| Netherlands | - | 1 | - | - | = |
| Total Developed | 4,375 | 4,039 | 3,099 | 2,742 | 2,500 |
| OTHER |  |  |  |  |  |
| Portugal | - | - | - | neg | 1 |
| Spain | 4 | 12 | 16 | 8 | 1 |
| Total Other | 4 | 12 | 16 | 8 | 2 |
| TOTAL ALL SOURCES | 6,393 | 8,786 | 5,200 | 4,212 | 3,359 |

Totals may not add due to rounding.

## APPARENT CANADIAN MARKET

|  | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | --- '000 units --- |  |  |  |  |
| Domestic Shipments | 5,772 | 7,308 | 6,612 | 7,488 | 8,040 |
| Less Exports | 24 | 12 | neg | neg | neg |
| Net Domestic Shipments | 5,748 | 7,296 | 6,612 | 7,488 | 8,040 |
| Imports | $\underline{7,112}$ | 10,202 | 5,463 | 4,754 | 5,268 |
| Apparent Canadian Market | 12,860 | 17,498 | 12,075 | 12,242 | 13,308 |
| Share of Market held by --- percent |  |  |  |  |  |
| Net Domestic Shipments | 45 | 42 | 55 | 61 | 60 |
| Imports | 55 | 58 | 45 | 39 | 40 |

## PILLOWCASES

## IMPORTS



DEVELOPED

| U.S.A. | 3,060 | 2,832 | 2,412 | 2,304 | 2,124 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Japan | 447 | 208 | 35 | 4 | 7 |
| United Kingdom | 10 | 42 | 33 | 34 | 6 |
| Sweden | neg | - | neg | 3 | 5 |
| Germany, West | 1 | 30 | 1 | - | 3 |
| Italy | -1 | - | - | neg |  |
| Switzerland | neg | -2 | -1 | - | - |
| Total Developed | 3,521 | 3,114 | 2,482 | 2,345 | 2,145 |

## OTHER

| Portugal | 2 | - | - | - | - |
| :---: | ---: | :---: | :---: | :---: | ---: |
| Total Other | 2 | - | - | - | - |
| TOTAL ALL SOURCES | 7,112 | 10,202 | 5,463 | 4,754 | 5,268 |

Totals may not add due to rounding.

## DEFINITION

The types of hosiery being restrained are classified by Statistics Canada as follows:

785-24 Hosiery, men's and boys', man-made fabrics
785-25 Hosiery, men's and boys', n.e.s.
785-39 Hosiery, women's and girls', n.e.s.
785-49 Hosiery, children's and infants

## SECTOR PROFILE

- There are 45 firms manufacturing hosiery other than ladies' pantyhose and seamless or full-fashioned hosiery.
- Twenty-four firms are located in Ontario, twenty in Québec, and one in Nova Scotia.
- Employment in these firms in 1979 was 2,352, an increase of 10 percent over the level of 2,136 in 1978.
- The Canadian market for these kinds of hosiery increased by over 16 percent in 1979, rising from 6,399,000 dozen pairs in 1978 to 7,458,000 dozen pairs in 1979.
- Canadian shipments increased from 1978 to 1979, but market share held by Canadian manufacturers declined slightly in 1979.
- Imports grew by 30 percent from 1978 to 1979, with several potentially large exporters of low-cost hosiery beginning to supply significant volumes to the Canadian market.


## APPARENT CANADIAN MARKET

|  | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | --- '000 dozen pairs --- |  |  |  |  |
| Domestic Shipments | 4,228 | 4,106 | 4,278 | 4,511 | 4,945 |
| Less Exports | 43 | 31 | 34 | 90 | 64 |
| Net Domestic Shipments | 4,185 | 4,075 | 4,244 | 4,421 | 4,881 |
| Imports | 1,752 | $\underline{\text { 2,375 }}$ | 2,406 | 1,978 | $\underline{2,577}$ |
| Apparent Canadian Market | 5,937 | 6,450 | 6,650 | 6,399 | 7,458 |
| Share of Market held by | --- percent --- |  |  |  |  |
| Net Domestic Shipments | 70 | 63 | 64 | 69 | 65 |
| Imports | 30 | 37 | 36 | 31 | 35 |


| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| LOW-COST | --- '000 dozen pairs --- |  |  |  |  |
| Korea, R. of | 430 | 1,046 | 809 | 406 | 586 |
| Taiwan | 283 | 119 | 203 | 215 | 273 |
| China, P. R. of | 18 | 20 | 30 | 56 | 143 |
| Malaysia | 2 | - | 2 | 16 | 74 |
| Singapore | 119 | 84 | 62 | 61 | 51 |
| India | 2 | 43 | 106 | 127 | 41 |
| Thailand | 2 | - | - | 14 | 29 |
| Poland | 53 | 10 | - | - | 4 |
| Hong Kong | 2 | 3 | 9 | 2 | 1 |
| Afghanistan | neg | 6 | 1 | 1 | 1 |
| Hungary | - | - | - | 3 | - |
| Czechoslovakia | - | - | 3 | - | - |
| Korea, North | - | 2 | 1 | - | - |
| Philippines | neg | neg | - | - | - |
| Pakistan | neg | - | - | - | - |

DEVELOPED

| U.S.A. | 520 |
| :--- | ---: |
| United Kingdom | 201 |
| Italy | 8 |
| France | 4 |
| Norway | neg |
| Germany West | neg |
| Japan | 1 |
| Austria | neg |
| Netherlands | neg |
| Switzerland | neg |
| Sweden | neg |
| Finland | neg |
| Iceland | neg |
| Denmark | neg |
| South Africa | neg |

Total Developed
734

| 627 | 753 | 942 | 1,237 |
| ---: | ---: | ---: | ---: |
| 269 | 229 | 79 | 89 |
| 18 | 33 | 26 | 26 |
| 13 | 8 | 10 | 10 |
| 6 | 7 | 3 | 3 |
| 2 | 4 | 2 | 2 |
| 2 | 7 | 1 | 1 |
| 1 | 4 | 2 | - |
| 1 | 1 | - | - |
| neg | 1 | - | - |
| neg | neg | neg | - |
| - | neg | neg | - |
| - | - | neg | - |
| - | - | - | - |
| - | - | - | - |
| 939 | 1,047 | 1,065 | 1,368 |

## HOSIERY

| IMPORTS (Continu |  |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| OTHER |  | --- | dozen |  |  |
| Israel | 100 | 100 | 134 | 10 | 3 |
| Spain | 1 | 1 | 2 | 3 | 2 |
| Total Other | 101 | 101 | 136 | 13 | 5 |
| TOTAL ALL SOURCES | 1,752 | 2,375 | 2,406 | 1,978 | 2,577 |

Totals may not add due to rounding.

## DEFINITION

Cordage, rope and twine includes all types of ropes, cables, twines and cords of any fibre content.

## SECTOR PROFILE

- There are 20 firms manufacturing these products in Canada.
- These firms are located in 8 different provinces, but the 9 firms located in Ontario account for 75 percent of total manufacturing employment in this sector. Four firms dominate the industry and accounted for 85 percent of Canadian shipments during 1979.
- Employment in 1979 reached 635, an increase of 21 percent over 1978.
- The Canadian market for these products increased by 28 percent in 1979 over 1978.
- Domestic shipments increased by almost 42 percent from 1978 to 1979. Share of market held by domestic manufacturers increased slightly, but was still low at 24.5 percent.
- Imports increased by over 6 million kilos, or 26 percent, from 1978 to 1979.


## APPARENT CANADIAN MARKET

|  | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | --- '000 kilos --- |  |  |  |  |
| Domestic Shipments | 10,457 | 7,600 | 7,750 | 7,726 | 10,129 |
| Less Exports | 978 | 825 | 1,083 | 839 | 783 |
| Net Domestic Shipments | 9,479 | 6,775 | 6,667 | 6,887 | 9,346 |
| Imports | 38,365 | 28,900 | 35,671 | 24,255 | 30,533 |
| Apparent Canadian Market | 47,844 | 35,675 | 42,338 | 31,142 | 39,879 |
| Share of Market held by |  |  | - percen |  |  |
| Net Domestic Shipments | 20 | 19 | 16 | 22 | 23 |
| Imports | 80 | 81 | 84 | 78 | 77 |

## CORDAGE, ROPE AND TWINE ALL PRODUCTS

IMPORTS

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| LOW-COST | --- '000 kilos --- |  |  |  |  |
| Mexico | 868 | 7,022 | 10,047 | 4,265 | 9,455 |
| Brazil | 5,733 | 4,552 | 11,087 | 6,706 | 8,938 |
| Tanzania | 2,195 | 6,911 | 3,715 | 875 | 1,666 |
| Korea, R. of | 596 | 702 | 936 | 1,234 | 1,189 |
| Philippines | 303 | 420 | 351 | 352 | 456 |
| Haiti | 1,447 | 66 | - | 275 | 259 |
| Thailand | 50 | 496 | 695 | 314 | 222 |
| Taiwan | 130 | 476 | 241 | 110 | 132 |
| India | 46 | 44 | 60 | 27 | 19 |
| Cuba | - |  | - | - | 15 |
| Hong Kong | 4 | 20 | 4 | 1 | 3 |
| Singapore | - | - | 2 | neg | 3 |
| Hungary | - | - | - | - | 1 |
| Czechoslovakia | neg | neg | neg | neg | - |
| Kenya | 1,690 | 460 | 242 | 430 | - |
| Bangladesh | 5 | neg | 3 | 13 | - |
| French Africa, n.e.s. | - |  | 53 | - | - |
| Mozambique | 2,176 | 145 | - | 43 | - |
| Korea, North | - | 59 | 5 | 50 | - |
| Venezuela | 9 | - | 11 | - | - |
| Pakistan | neg | - | - | - | - |
| Puerto Rico | neg | - | - | - | - |
| Colombia | 16 | 54 | - | - | - |
| Nigeria | - | - | - | neg | - |
| China, P. R. of | 3 | neg | - | - | - |
| Total Low-Cost | 15,271 | 21,428 | 27,454 | 14,697 | 22,360 |

IMPORTS (Continued)

| SOURCE | $\underline{1975}$ | $\underline{1976}$ | $\underline{1977}$ |
| :--- | :--- | :---: | :---: |
| DEVELOPED | --- 1979 |  |  |


| U.S.A. | 6,846 | 3,664 | 5,031 | 5,862 | 4,058 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Germany, West | 3,121 | 544 | 1,287 | 920 | 1,429 |
| United Kingdom | 1,642 | 1,099 | 421 | 398 | 597 |
| Japan | 1,097 | 201 | 163 | 171 | 149 |
| South Africa | 12 | 2 | 109 | 128 | 129 |
| Belgium-Lux. | 5,010 | 303 | 31 | 58 | 125 |
| Norway | 51 | 43 | 122 | 199 | 102 |
| Netherlands | 293 | 129 | 156 | 263 | 55 |
| Italy | 34 | 22 | 21 | 48 | 39 |
| Denmark | 536 | 22 | 9 | 63 | 36 |
| Finland | 1 | 1 | 1 | 7 | 16 |
| France | 276 | 126 | 2 | 6 | 6 |
| Austria | neg | 8 | 2 | 2 | 6 |
| Switzerland | 253 | 13 | 5 | 5 | 5 |
| Ireland | 1,660 | 343 | 8 | 6 | 5 |
| Iceland | - | - | 3 | 8 | 4 |
| Sweden | 300 | 20 | 13 | 14 | -4 |
| Total Developed | 21,133 | 6,541 | 7,385 | 8,157 | 6,764 |

OTHER

| Portugal | 1,729 | 911 | 742 | 1,203 | 1,209 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Spain | 233 | 20 | 89 | 200 | 200 |
| Israel | - | - | -1 | - | - |
| Total Other | 1,962 | 931 | 832 | 1,403 | 1,409 |
|  |  |  |  |  |  |
| TOTAL ALL SOURCES | 38,365 | 28,900 | 35,671 | 24,255 | 30,533 |

Totals may not add due to rounding.

## DEFINITION

All clothing subject to restraint, i.e. outerwear, pants and slacks, shorts, overalls and coveralls, unstructured suits, blouses, T-shirts, sweatshirts, pyjamas and sleepwear, bathrobes and dressing gowns, raincoats, dresses, skirts, suits and coordinates, athletic suits, foundation garments, swimsuits, underwear, outer-jackets, overcoats and topcoats, professional and shop coats, structured sportcoats and blazers, structured suits, leather coats and jackets, shirts, sweaters, pullovers and cardigans.

## INDUSTRY PROFILE

- Based on 1977 Statistics Canada data, the clothing industry, as defined above, was comprised of 1,650 establishments, including 344 contractors.
- Regionally speaking the industry is primarily located in Québec (7l percent) Ontario (20 percent) and Manitoba (4 percent).
- Contractors are primarily located in the Province of Québec (90 percent) based on 1977 statistics.
- Based on 1977 statistics there were 91,294 production and related workers. Manufacturing employment represented 84 percent with 76,232 production employees, contractors 16 percent with 15,062 production employees.
- Underwear (Control No. 45) pants, slacks and shorts (Control No. 37) skirts, suits and coordinates (Control No. 42) and blouses, T-shirts and sweatshirts (Control No. 39) were the major products shipped in order of importance during 1979 and accounted for 65 percent of total shipments during that year.
- Blouses, T-shirts and sweatshirts (Control No. 39), pants, slacks and shorts (Control No. 37), sweaters, pullovers and cardigans (Control No. 50) and men's and boys' shirts (Control No. 49) were the major products imported in order of magnitude during 1979 and accounted for 69 percent of total imports during that year.
- Taiwan, Hong Kong, the Republic of Korea and the People's Republic of China were the major sources of imports in order of importance from restrained sources during 1979 and represented 89 percent of all imports from such sources and 69 percent of imports from all sources.
- The United States, Italy, Poland, the People's Republic of China and France were major sources of imports of products not being restrained by individual sources in 1979 and represented 62 percent of all imports from such sources and 14 percent of imports from all sources.
- During the period 1975 to 1979 domestic shipments increased by 7.4 percent for a yearly average increase of 1.9 percent. During this same period, imports decreased by 8.1 percent or by an average of 2.0 percent yearly.
- 1981 restraint levels are 100.6 percent of 1979 total imports from all sources.
$1975 \quad \frac{1976}{1977} \quad \underline{1978} \quad \underline{1979}$

| Domestic Shipments (1) | 345,834 | 340,461 | 333,068 | 360,867 | 371,447 |
| :--- | :--- | :--- | :--- | :--- | :--- | :--- |
| Less Exports (1) | $\underline{3,525}$ | $\underline{3,378}$ | $-3,670$ | $\underline{3,171}$ | $\underline{3,167}$ |
| Net Domestic Shipments | 342,309 | 337,083 | 329,398 | 357,696 | 368,280 |
| Imports ${ }^{(2)}$ | $\underline{182,151}$ | $\underline{266,929}$ | $\underline{180,608}$ | $\underline{163,874}$ | $\underline{167,474}$ |
| Apparent Canadian Market | 524,460 | 604,012 | 510,006 | 521,570 | 535,754 |


| Share of Market held by | --- percent --- |  |  |  |  |
| :--- | :--- | :--- | :--- | :--- | :--- |
| Net Domestic Shipments | 65 | 56 | 65 | 69 | 69 |
| Imports | 35 | 44 | 35 | 31 | 31 |


| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 | $\begin{gathered} \text { Restraint } \\ \text { levels } \\ 1981 \\ \hline \end{gathered}$ |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| RESTRAINED | --- '000 garments --- |  |  |  |  |  |
| Taiwan | 49,714 | 73,290 | 46,115 | 45,553 | 40,935 | 53,265 |
| Hong Kong | 34,518 | 55,469 | 38,409 | 36,882 | 32,846 | 39,449 |
| Korea, R. of | 29,610 | 45,616 | 35,455 | 31,300 | 23,465 | 35,539 |
| China, P. R. of | 11,443 | 24,485 | 18,048 | 13,883 | 18,381 | 17,327 (5) |
| India | 3,422 | 5,431 | 2,366 | 2,070 | 3,594 | 5,053 |
| Philippines | 2,578 | 3,743 | 2,215 | 2,138 | 3,320 | 4,737 |
| Romania | 1,891 | 2,805 | 1,569 | 1,526 | 2,127 | 2,782 |
| Poland | 1,168 | 1,974 | 1,799 | 2,628 | 1,342 | 1,620 |
| Malaysia | 1,163 | 1,460 | 769 | 758 | 1,317 | 1,499 |
| Singapore | 730 | 400 | 140 | 187 | 1,113 | 2,635(3) |
| Thailand | 241 | 135 | 21 | 87 | 972 | 1,764 |
| Macao | 120 | 193 | 125 | 661 | 644 | 1,057 |
| Bulgaria | 5 | 26 | 20 | 53 | 329 | 1,012 |
| Sri Lanka | - | - | 5 | 4 | 192 | 666 |
| Hungary | 8 | 11 | 8 | 28 | 40 | 27 |
| Total Restrained | 136,660 | 215,038 | 147,064 | 137,758 | 130,617 | 168,431 (20) |

# ALL CLOTHING SUB.JECT TO <br> RESTRAINT MEASURES 

| IMPORTS (Continued) |  |  | CONTROL NOS, 32, 37 TO 50 |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| UNRESTRAINED LOW-COST |  | --- | '000 garm | --- |  |
| Poland | 501 | 378 | 321 | 820 | 3,788 |
| China, P. R. of | 465 | 2,203 | 484 | 403 | 2,830 |
| Pakistan | 6,319 | 5,297 | 2,318 | 1,195 | 1,204 |
| Brazil | 2,748 | 2,657 | 809 | 595 | 904 |
| Romania | 167 | 320 | 127 | 186 | 820 |
| Mexico | 1,833 | 1,934 | 814 | 727 | 768 |
| Puerto Rico | 1,538 | 2,153 | 1,722 | 321 | 575 |
| Hungary | 54 | 38 | 65 | 150 | 451 |
| Korea, R. of | 75 | 85 | 87 | 84 | 329 |
| Indonesia | 7 | 2 | neg | neg | 325 |
| Philippines | 208 | 238 | 137 | 132 | 230 |
| Hong Kong | 192 | 289 | 174 | 83 | 212 |
| Leew-Wind | - | - | - | 7 | 183 |
| Barbados | 25 | 120 | 140 | 287 | 167 |
| Malaysia | 103 | 351 | 234 | 52 | 137 |
| Czechoslovakia | 198 | 203 | 180 | 153 | 137 |
| Thailand | 22 | 12 | 39 | 7 | 127 |
| Sri Lanka | - | - | 38 | 10 | 85 |
| Morocco | 274 | 380 | 234 | 107 | 74 |
| El Salvador | 77 | 40 | 5 | 30 | 74 |
| Haiti | neg | 2 | 1 | - | 51 |
| Honduras | - | - | - | $\bar{\square}$ | 48 |
| India | 12 | 36 | 10 | 42 | 46 |
| Macao | - | 8 | 2 | neg | 40 |
| Singapore | - | 1 | 35 | 1 | 36 |
| Uruguay | 6 | 108 | 10 | 4 | 35 |
| Malta | 27 | 54 | 6 | 12 | 20 |
| Panama | 91 | 28 | 6 | 5 | 19 |


| IMPORTS (Continued) |  |  | CONTROL NOS, 32,37 TO 50 |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
| SOURCE | 1975 | 1276 | 1977 | 1978 | 1979 |
| UNRESTRAINED LOW-COST (Continued) |  |  | '000 garments | --- |  |
| Turkey | 31 | 80 | 25 | 1 | 17 |
| Afghanistan | 20 | 22 | 33 | 17 | 14 |
| Cyprus | 2 | - | 3 | 2 | 13 |
| Colombia | 359 | 348 | 32 | 1 | 12 |
| Bolivia | 16 | 22 | 15 | 13 | 10 |
| Argentina | 2 | 57 | 10 | 2 | 9 |
| Ecuador | 8 | 8 | 11 | 8 | 9 |
| Peru | neg | neg | 2 | 3 | 6 |
| Korea, North | 6 | 88 | 22 | - | 4 |
| Jamaica | 5 | 167 | 10 | neg | 3 |
| Guatemala | 25 | 10 | 3 | 2 | 2 |
| Venezuela | neg | neg | 1 | 16 | 1 |
| Bulgaria | 30 | 5 | 4 | neg | 1 |
| Egypt | - | - | - | 1 | neg |
| Algeria | - | - | - | - | neg |
| Chile | 2 | - | - | neg | neg |
| Iran | neg | - | - | - | neg |
| Togo | - | - | - | 16 |  |
| Trinidad | 3 | 12 | 9 | . | - |
| Mauritius | 13 | 1 | 6 | - | - |
| Viet Nam | 194 | - | - | - | - |
| Nicaragua | 19 | 7 | - | - | - |
| Malawi | - | 9 | - | - | - |
| Costa Rica | 7 | - | - | - | - |
| U.S.S.R. | 2 | - | - | - | - |
| Guyana | 1 | - | neg | - | - |
| Virgin Islands | - | - | $\ldots$ neg | $=$ | $\underline{=}$ |
| Total Unrestrained |  |  |  |  |  |
| Low-Cost | 15,687 | 17,773 | 8,184 | 5,488 | 13,816 |

## ALL CLOTHING SUBJECT TO

RESTRAINT MEASURES

IMPORTS (Continued)
SOURCE
DEVELOPED
U.S.A.

Italy
France
United Kingdom
Japan
Germany, West
Sweden
Austria
Finland
Switzerland
Iceland
Ireland
Netherlands
Norway
South Africa
New Zealand
Belgium
Denmark
Australia
Total Developed
OTHER

| Spain | 1,928 | 2,330 | 1,413 | 1,319 | 1,569 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Portugal | 749 | 365 | 82 | 112 | 332 |
| Israel | 1,475 | 1,562 | 507 | 298 | 225 |
| Yugoslavia | 45 | 25 | 31 | 100 | 178 |
| Greece | 9, | 86 | 81 | 123 | 152 |
| Total Other | 4,291 | 4,368 | 2,114 | 1,952 | 2,456 |
|  |  |  |  |  |  |
| TOTAL ALL SOURCES | 182,151 | 266,929 | 180,608 | 163,874 | 167,474 |

182,151 266,929 180,608 163,874 167,474

Totals may not add due to rounding.

## DEFINITION

Winter outerwear garments, men's, boys', women's, girls', children's and infants', (commonly referred to as snowsuits, snow-mobile suits, ski suits, ski pants and snow-pants, and jackets and vests including parkas, ski-jackets, and similar jacket-type garments) that have an outer shell manufactured substantially by surface area with woven fabrics and that are lined and designed to protect the wearer against cold, e.g. quilted linings, down or fibre filling, etc., but not plain acetate or viscose lining, wholly or mainly by weight of cotton, man-made fibres or wool, or blends thereof, but excluding: all unlined outerwear; all coats three-quarter length or longer, that is, to the knee or below the knee; garments commonly known as squall jackets, windbreakers or similar jacket-type garments where there is no thermal insulation; bona fide industrial enduse clothing, although they meet the requirements of the above description; and ski-pants and cross-country ski-suits which do not meet the above description (e.g., constructed entirely from knitted fabric)

SECTOR PROFILE

- Based on the latest statistics available (1976) the Canadian outerwear industry is comprised of 123 firms.
- Regionally speaking the industry is located primarily in Québec (57 percent) and Ontario and Manitoba (15 percent) each.
- Major centres of production in order of importance are Montréal, Winnipeg and Toronto.
- From a survey of 30 firms in 1978, representing 41 percent of domestic shipments, production employees were reported as being 2,269.
- In 1979, it is estimated that adult outerwear (men's, boys', women's and girls') accounted for 85 percent of the total number of garments shipped. Children's and infants' outerwear accounted for 15 percent.
- From 1975 to 1979, domestic shipments of outerwear increased by 13.9 percent for a yearly average increase of 3.5 percent. Adult outerwear increased by 21.5 percent during that period for a yearly average of 5.3 percent. Children's outerwear on the other hand decreased by 15.5 percent for an average annual decrease of 3.8 percent.
- In 1979, imports of outerwear were restrained from ten sources which accounted for 91 percent of total garments imported.
- In addition to outerwear, firms in this industry sector also produce pants, raincoats, athletic suits, overcoats and top coats and outer jackets.

|  | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | --- '000 garments --- |  |  |  |  |
| Domestic Shipments ${ }^{(1)}$ | 6,292 | 5,871 | 5,761 | 6,442 | 7,170 |
| Less Exports ${ }^{(1)}$ | 451 | 420 | 278 | 282 | 277 |
| Net Domestic Shipments | 5,841 | 5,451 | 5,483 | 6,160 | 6,893 |
| Imports ${ }^{(12)}$ | 2,017 | 3,914 | 1,788 | 1,562 | 3,068 |
| Apparent Canadian Market | 7,858 | 9,365 | 7,271 | 7,722 | 9,961 |
| Share of Market held by |  |  | percen |  |  |
| Net Domestic Shipments | 74 | 58 | 75 | 80 | 69 |
| Imports | 26 | 42 | 25 | 20 | 31 |

## IMPORTS

CONTROL NO, 32

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1972 | $\begin{gathered} \text { Restraint } \\ \text { levels } \\ 1981 \\ \hline \end{gathered}$ |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| RESTRAINED |  |  | '000 | ments |  |  |
| Korea, R. of | 1,098 | 2,617 | 1,285 | 1,046 | 1,781 | 2,045 |
| Hong Kong | 536 | 752 | 350 | 314 | 524 | 548 |
| China, P. R. of | 44 | 61 | 5 | 5 | 280 | 225 (5) |
| Taiwan | 99 | 309 | 56 | 46 | 48 | 51 |
| Philippines | 17 | 32 | 25 | - | 45 | 62 |
| Singapore | - | 1 | - | 21 | 33 | 84 (3) |
| Thailand | - | - | neg | 13 | 27 | 56 |
| Romania | - | 29 | neg | - | 25 | 53 |
| Macao | - | - | - | neg | 13 | 27 |
| Bulgaria |  |  | - |  | - | 28 |
| Total Restrained | 1,794 | 3,801 | 1,721 | 1,445 | 2,776 | 3,179 (4) |

UNRESTRAINED LOW-COST

| Leew-Wind | - | - | - | - | 11 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Czechoslovakia | - | - | - | - | 2 |
| Ecuador | - | - | - | 1 | 2 |
| Mexico | - | - | - | neg | 2 |
| Uruguay | - | - | - | - | 1 |
| Barbados | - | - | - | 1 | 1 |
| Jamaica | - | - | - | - | 1 |
| Algeria | - | - | - | - | neg |
| India | - | neg | - | 1 | neg |
| Malaysia | - | - | - | - | neg |
| Afghanistan | - | - | - | - | neg |
| Bolivia | - | - | - | - | neg |
| Brazil | 10 | 18 | 2 | - | neg |
| Colombia | - | - | - | - | neg |
| Peru | - | - | - | - | neg |
| Guatemala | - | $=$ | - | $=$ | neg |

Total Unrestrained
Low-Cost
10
18
3
20

## OUTERWEAR

IMPORTS (Continued)

## CONTROL NO, 32

SOUTICE
1975

## $1976 \quad 1977 \quad 1978$

1979
DEVELOPED

| France | 1 | 1 | 12 | 25 | 104 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| U.S.A. | 15 | 22 | 13 | 16 | 60 |
| Italy | 2 | 9 | 9 | 10 | 23 |
| Austria | 1 | 1 | 1 | 16 | 16 |
| Switzerland | 1 | 1 | 1 | 11 | 10 |
| United Kingdom | 1 | 3 | 4 | 3 | 7 |
| Japan | 188 | 50 | 18 | 24 | 4 |
| Finland | 1 | 1 | 1 | 1 | 3 |
| Germany, West | 2 | 3 | 4 | 4 | 2 |
| Ireland | - | - | - | neg | 1 |
| Iceland | - | - | - | neg | 1 |
| Norway | - | - | - | neg | 1 |
| Australia | - | - | - | - | 1 |
| Belgium | - | - | - | neg | neg |
| Denmark | - | - | neg | 2 | neg |
| Netherlands | - | - | - | - | neg |
| Sweden | neg | neg | neg | neg | neg |
| New Zealand | - | 3 | neg | - | neg |
| South Africa | $=$ | = | neg | - | $=$ |
| Total Developed | 212 | 94 | 63 | 112 | 233 |

## OTHER

| Spain | - | - | - | 1 | 27 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Portugal | 1 | neg | - | - | 5 |
| Yugoslavia | - | - | - | - | 2 |
| Greece | - | - | - | - | 1 |
| Israel | neg | neg | -1 | - | -1 |
| Total Other | 1 | neg | 1 | 1 | 36 |
|  |  |  |  |  |  |
| TOTAL ALL SOURCES |  |  |  |  |  |

Totals may not add due to rounding.

| $\underline{1975}$ | $\underline{1976}$ | $\underline{1977}$ | $\underline{1978}$ | $\underline{1979}$ |
| ---: | ---: | ---: | ---: | ---: |
|  | $\ldots, 000$ | garments | $-\ldots$ |  |
| 4,998 | 4,994 | 4,858 | 5,595 | 6,076 |
| $\underline{424}$ | $\underline{398}$ | $\underline{266}$ | $\underline{273}$ | $\underline{264}$ |
| 4,574 | 4,596 | 4,592 | 5,322 | 5,812 |
| 1,795 | $\underline{3,501}$ | $\underline{1,541}$ | $\underline{1,363}$ | $\underline{2,577}$ |
| 6,369 | 8,097 | 6,133 | 6,685 | 8,389 |


| Share of Market held by | --- percent --- |  |  |  |  |
| :--- | :--- | :--- | :--- | :--- | :--- |
| Net Domestic Shipments | 72 | 57 | 75 | 80 | 69 |
| Imports | 28 | 43 | 25 | 20 | 31 |

OUTERWEAR - WOMEN'S

GIRLS', MEN'S, BOYS

| SOURCE | 1975* | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| RESTRAINED | '000 garments --- |  |  |  |  |
| Korea, R. of |  | 2,415 | 1,131 | 912 | 1,606 |
| Hong Kong |  | 577 | 260 | 266 | 353 |
| China, P. R. of |  | 61 | 5 | 5 | 280 |
| Taiwan |  | 282 | 56 | 36 | 44 |
| Singapore |  | 1 | - | 21 | 33 |
| Thailand |  | - | neg | 13 | 27 |
| Romania |  | 29 | neg | - | 25 |
| Philippines |  | 32 | 25 | - | 20 |
| Macao |  | - | - | neg | 13 |
| Bulgaria |  | - | - | - | - |
| Total Restrained | - | 3,397 | 1,477 | ,253 | 2,401 |

UNRESTRAINED LOW-COST


## OUTERWEAR - WOMEN'S

 GIRLS', MEN'S, BOYS'| IMPORTS |  |  | CONTROL NO, 32.1 |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
| SOURCE | 1975* | 1976 | 1977 | 1978 | 1979 |
| DEVELOPED |  | --- | garm | --- |  |
| U.S.A. |  | 20 | 12 | 15 | 59 |
| France |  | 1 | 11 | 23 | 42 |
| Austria |  | 1 | 1 | 14 | 15 |
| Italy |  | 9 | 9 | - | 12 |
| Switzerland |  | 1 | 1 | 11 | 10 |
| United Kingdom |  | 3 | 4 | 3 | 7 |
| Germany, West |  | 3 | 4 | 4 | 2 |
| Norway |  | - | - | neg | 1 |
| Finland |  | 1 | I | 1 | 1 |
| Iceland |  | - | - | 9 | 1 |
| Ireland |  | - | - | neg | 1 |
| Sweden |  | neg | neg | neg | neg |
| Netherlands |  | - | - | - | neg |
| Japan |  | 41 | 18 | 23 | neg |
| New Zealand |  | 3 | neg | - | neg |
| Belgium |  | - | - | neg | ne.g |
| Denmark |  | - | neg | 1 | neg |
| South Africa |  | - | neg | - | - |
| Total Developed | - | 83 | 61 | 104 | 151 |

OTHER

| Yugoslavia |  | - | - | - | 2 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Spain |  | - | - | 1 | 2 |
| Israel |  | neg | 1 | - | neg |
| Portugal |  | neg | - | - | - |
| Total Other | - | neg | 1 | 1 | 4 |
| *Not available. |  |  |  |  |  |
| TOTAL ALL SOURCES | - | 3,501 | 1,541 | 1,363 | 2,57\% |

Totals may not add due to rounding.

| 1976 | $\underline{1977} \quad \underline{1978}$ |
| :--- | :--- | :--- |
| $--{ }^{\prime} 000$ | garments --- |


| Domestic Shipments ${ }^{(1)}$ | 1,294 | 877 | 903 | 847 | 1,094 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Less Exports ${ }^{(1)}$ | 27 | 22 | 12 | 9 | 13 |
| Net Domestic Shipments | 1,267 | 855 | 891 | 838 | 1,081 |
| Imports ${ }^{\text {(12) }}$ | 222 | 413 | 247 | 199 | 491 |
| Apparent Canadian Market | 1,489 | 1,268 | 1,138 | 1,037 | 1,572 |


| Share of Market held by | --- percent --- |  |  |  |  |
| :--- | :---: | :---: | :---: | :---: | :---: |
| Net Domestic Shipments | 85 | 67 | 78 | 81 | 69 |
| Imports | 15 | 33 | 22 | 19 | 31 |


| SOURCE | 1975* | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| RESTRAINED |  | --- '000 garments --- |  |  |  |
| Korea, R. of |  | 201 | 155 | 134 | 175 |
| Hong Kong |  | 175 | 90 | 48 | 171 |
| Philippines |  | - | - | - | 26 |
| Taiwan |  | 26 | - | 11 | 4 |
| Singapore |  | - | - | 1 | - |
| China, P. R. of |  | - | - | - | - |
| Romania |  | - | - | - | - |
| Macao |  | - | - | - | - |
| Thailand |  | - | - | - | - |
| Bulgaria |  | - | - | - | - |
| Total Restrained | - | 402 | 245 | 194 | 376 |

UNRESTRAINED LOW-COST

| Jamaica | - | - | - | l |
| :--- | :--- | :--- | ---: | ---: |
| Ecuador | - | - | - | neg |
| Brazil | - | - | - | neg |
| India | - | - | neg | - |
| Total Unrestrained |  |  |  |  |
| Low-Cost | - | - | neg | 1 |


| IMPORTS (Continued) |  |  | CONTROL NO, 32.2 |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
| SOURCE | 1975* | 1976 | 1977 | 1978 | 1979 |
| DEVELOPED |  | --- | garm | --- |  |
| France |  | - | 1 | 1 | 63 |
| Italy |  | - | - | neg | 11 |
| Japan |  | 9 | - | 2 | 4 |
| Austria |  | - | - | 1 | 1 |
| Finland |  | - | - | - | 1 |
| U.S.A. |  | 2 | 1 | neg | 1 |
| Australia |  | - | - | - | 1 |
| United Kingdom |  | - | - | - | 1 |
| Cermany, West |  | - | - | neg | neg |
| Norway |  | - | - | neg | neg |
| Belgium |  | - | - | - |  |
| Switzerland |  | - | neg | neg | - |
| Denmark |  | - | - | neg | - |
| Total Developed | - | 11 | 2 | 4 | 83 |
| OTHER |  |  |  |  |  |
| Spain |  | - | - | - | 25 |
| Portugal |  | - | - | - | 5 |
| Israel |  | - | - | - | 1 |
| Greece |  | 二 | - | - | 1 |
| Total Other | - | - | - | - | 32 |
| total all sources | - | 413 | 247 | 199 | 491 |
| *Not available. |  |  |  |  |  |

Totals may not add due to rounding.

## DEFINITION

a) Pants and Slacks (women's, girls', men's and boys') Garments that do not extend above the waist but do extend to the knee or below. Included are jodhpurs, knickers, footless tights and gauchos. Garments in this category manufactured of fabric containing 5 percent or more by weight of wool are considered to be woollen garments.
b) Outer shorts

Same as pants but not extending to the knees.
c) Overalls and Coveralls

A one-piece garment, as either pants or shorts, but extending above the waist in the form of a bib (or permanently affixed straps) or other structure which partially or fully covers the upper part of the body. One-piece jumpsuits are included in this item.
d) Children's and Infants' (0-6x)

Pants, Slacks, Shorts, Overalls and Coveralls. As above but sizes 0-6x.

## SECTOR PROFILE

- Based on the latest statistics available (1976), the Canadian industry is comprised of 274 establishments.
- These establishments were primarily located in Québec (63 percent) and Ontario ( 20 percent).
- Major centres of production in order of importance are Montréal (56 percent), Toronto (16 percent) and Winnipeg (l0 percent).
- In 1979, wool pants accounted for 7 percent of total shipments, other pants 72 percent, shorts 3 percent, overalls and coveralls 2 percent and children's and infants' wear 16 percent.
- There are no published data available on total employment in this sector. From a survey of 44 firms, production employees were reported as follows:

| $\underline{1975}$ | $\frac{1976}{7,596}$ | $\underline{1977}$ | $\frac{1978}{7,533}$ |
| ---: | ---: | ---: | ---: |

- Domestic shipments of wool pants and slacks increased by 23 percent in 1979 compared to 1978. This increase is consistent with the increase in structured sportcoats and blazers (Control No. 47.1) reflecting the shift towards casual wear.
$1975 \quad \underline{1976} \underset{\sim}{1977} \quad \underline{1978} \quad \underline{1979}$

| Domestic Shipments ${ }^{(1)}$ | 47,189 | 46,387 | 52,106 | 52,792 | 55,910 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Less Exports ${ }^{(1)}$ | 770 | 577 | 1,075 | 769 | 895 |
| Net Domestic Shipments | 46,419 | 45,810 | 51,031 | 52,023 | 55,015 |
| Imports ${ }^{(13)}$ | 27,509 | 43,203 | 27,175 | 23,671 | 23,365 |
| Apparent Canadian Market | 73,928 | 89,013 | 78,206 | 75,694 | 78,380 |


| Share of Market held by | -.- percent --- |  |  |  |  |
| :--- | :--- | :--- | :--- | :--- | :--- |
| Net Domestic Shipments | 63 | 51 | 65 | 69 | 70 |
| Imports | 37 | 49 | 35 | 31 | 30 |

## IMPORTS

| SOURCE | 1975 | 1976 | -1977 | 1978 | 1979 | $\begin{gathered} \text { Restraint } \\ \text { levels } \\ 1981 \\ \hline \end{gathered}$ |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| RESTRAINED |  |  | --- '000 | arments |  |  |
| China, P. R. of | 3,203 | 8,492 | 6,751 | 5,505 | 5,833 | 5,530(5) |
| Taiwan | 6,741 | 10,755 | 6,359 | 5,165 | 4,735 | 7,194 |
| Hong Kong | 4,089 | 8,934 | 4,730 | 5,941 | 4,443 | 5,281 |
| Korea, R. of | 3,110 | 4,023 | 2,202 | 2,401 | 1,302 | 3,758 |
| Macao | 26 | 115 | 16 | 391 | 198 | 281 |
| India | 24 | 77 | 64 | 64 | 138 | 318 |
| Romania | 32 | 89 | 52 | neg | 57 | 53 |
| Thailand | 174 | 30 | 6 | 9 | 51 | 200(7) |
| Singapore | 53 | 64 | 6 | 2 | 18 | 250(3+7) |
| Bulgaria | - | - | - | - | 12 | 169 |
| Total Restrained | 17,452 | 32,579 | 20,186 | 19,478 | 16,787 | 23,034 (4) |

PANTS \& SLACKS, SHORTS, OVERALLS \& COVERALLS

| IMPORTS (Continued) |  |  |  | CONTR | NO, 3 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| UNRESTRAINED LOW-COST |  | --- | garme | --- |  |
| Poland | 98 | 7 | 4 | 186 | 675 |
| Puerto Rico | 1,538 | 2,144 | 1,721 | 315 | 558 |
| Mexico | 1,579 | 1,608 | 496 | 490 | 549 |
| Brazil | 639 | 539 | 236 | 191 | 137 |
| Czechoslavakia | 148 | 150 | 158 | 140 | 116 |
| Philippines | 66 | 37 | 3 | 94 | 90 |
| Leew-Wind | - | - | - | - | 89 |
| Hungary | - | - | - | 4 | 25 |
| Pakistan | 9 | 24 | 35 | 25 | 13 |
| Sri Lanka | - | - | - | - | 10 |
| Colombia | 121 | 92 | - | - | 1 |
| El Salvador | - | - | - | - | neg |
| Ecuador | - | - | - | - | neg |
| Algeria | - | - | - | - | neg |
| Panama | 81 | 28 | 6 | 5 | - |
| Malaysia | - | - | 12 | - | - |
| Uruguay | - | 26 | 3 | - | - |
| Barbados | - | 12 | 2 | - | - |
| North Korea | - | 46 | 1 | - | - |
| Argentina | - | 24 | 1 | - | - |
| Nicaragua | 18 | 7 | - | - | - |
| Viet Nam | 194 | - | - | - | - |
| Guatemala | 15 | - | neg | - | - |
| Malawi | - | 9 | - | - | - |
| Malta | 8 | 8 | - | - | - |
| Indonesia | - | 1 | - | - | - |
| Guyana | 1 | - | - | - | - |
| Cyprus | - | - | neg | - | - |
| Morocco | neg | - | - | - | - |
| Jamaica | neg | - | - | - | - |
| Haiti | neg | - | - | - | - |
| Total Unrestrained |  |  |  |  |  |

PANTS \& SLACKS, SHORTS, OVERALLS \& COVERALLS

| $\underbrace{\text { IMPORTS }}_{\text {SOURCE }}$ (Continued) |  |  |  | CONTROL NO. 37 |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | 1975 | 1976 | 1977 | 1978 | 1979 |
| DEVELOPED | --- '000 garments --- |  |  |  |  |
| U.S.A. | 3,781 | 4,082 | 2,946 | 1,093 | 2,148 |
| France | 158 | 162 | 169 | 304 | 368 |
| Germany, West | 162 | 393 | 277 | 210 | 320 |
| Italy | 30 | 61 | 72 | 96 | 143 |
| Japan | 249 | 213 | 83 | 105 | 102 |
| United Kingdom | 92 | 62 | 44 | 96 | 69 |
| Austria | 19 | 22 | 24 | 20 | 26 |
| Sweden | 9 | 8 | 26 | 47 | 20 |
| Switzerland | 4 | 5 | 6 | 9 | 19 |
| Netherlands | neg | 5 | 1 | neg | 7 |
| New Zealand | 1 | 2 | neg | 3 | 4 |
| Finland | 1 | 1 | 2 | 3 | 3 |
| South Africa | neg | - | neg | 3 | 1 |
| Australia | 13 | 3 | 1 | 1 | 1 |
| Belgium | 133 | 1 | 1 | neg | 1 |
| Norway | 9 | 7 | 1 | 2 | 1 |
| Denmark | 5 | 1 | 3 | neg | neg |
| Ireland | neg | neg | neg | neg | neg |
| Total Developed | 4,666 | 5,028 | 3,656 | 1,992 | 3,233 |


| Spain | 763 | 767 | 641 | 643 | 902 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Yugoslavia | - | - | - | 92 | 150 |
| Israel | 33 | 57 | 13 | 12 | 24 |
| Portugal | 78 | 7 | neg | 1 | 2 |
| Greece | neg | - | 1 | 2 | 1 |
| Total Other | 874 | 831 | 655 | 750 | 1,079 |
| TOTAL ALL SOURCES | 27,509 | 43,203 | 27,175 | 23,671 | 23,365 |

Totals may not add due to rounding.

```
            PANTS & SLACKS,- CONTAINING AT LEAST
            5% WOOL, WOMEN'S, GIRLS', MEN'S, BOYS'
```


## APPARENT CANADIAN MARKET

|  | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | --- '000 garments --- |  |  |  |  |
| Domestic Shipments ${ }^{(1)}$ | 2,496 | 2,957 | 2,587 | 2,956 | 3,629 |
| Less Exports ${ }^{(1)}$ | 43 | 27 | 54 | 42 | 51 |
| Net Domestic Shipments | 2,453 | 2,930 | 2,533 | 2,914 | 3,578 |
| Imports ${ }^{\text {(13) }}$ | 60 | - 75 | 107 | $\underline{.97}$ | 302 |
| Apparent Canadian Market | 2,513 | 3,005 | 2,640 | 3,011 | 3,880 |
| Share of Market held by |  |  | rcent |  |  |
| Net Domestic Shipments | 98 | 98 | 96 | 97 | 92 |
| Imports | 2 | 2 | 4 | 3 | 8 |


| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| RESTRAINED | --- '000 garments --- |  |  |  |  |
| China, P. R. of | - | 9 | 16 | - | 67 |
| India | - | - | 11 | 18 | 18 |
| Bulgaria | - | - | - | - | 12 |
| Hong Kong | 1 | neg | 1 | 4 | 8 |
| Korea, R, of | 28 | 35 | 61 | 11 | 4 |
| Taiwan | - | - | neg | - |  |
| Singapore | - | - | - | - |  |
| Thailand | - | - | - | - |  |
| Macao | - | - | - | - |  |
| Romania | - | - | $\underline{=}$ | - | - |
| Total Restrained | 29 | 44 | 89 | 33 | 109 |

UNRESTRAINED LOW-COST

| Poland | neg | 4 | 2 | 13 | 153 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Philippines | - | - | - | - | 3 |
| Colombia | neg | - | - | - | 1 |
| Algeria | - | - | - | - | neg |
| Hungary | - | - | - | 4 | - |
| Czechoslovakia | 6 | - | - | - | - |
| Uruguay | - | neg | neg | - | - |
| Total Unrestrained |  |  |  |  |  |
| Low-Cost | 6 | 4 | 2 | 17 | 157 |

5\%ANTS \& SLACKS - CONTAINING AT LEAST,
$5 \%$ WOOL, WOMEN'S, GIRLS', MEN'S, BOYS'

| IMPORTS (Continued) |  |  |  |  | CONTROL NO. 37.1 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| SOURCE | 1275 | 1976 | 1977 | 1978 | 1979 |
| DEVELOPED |  | - | 00 gar | ts --- |  |
| Italy | 2 | 4 | 5 | 9 | 12 |
| U.S.A. | 3 | 5 | 4 | 5 | 7 |
| France | 12 | 5 | 5 | 9 | 6 |
| United Kingdom | 2 | 2 | 2 | 3 | 3 |
| Austria | 2 | 7 | neg | 2 | 1 |
| Germany, West | 2 | 1 | 1 | 1 | 1 |
| Belgium | - | neg | - | - | 1 |
| Sweden | neg | - | neg | 17 | 1 |
| Switzerland | neg | neg | - | neg | neg |
| Finland |  | - | - | - | neg |
| Netherlands | - | - | - | neg | neg |
| Norway | - | - | - | neg | neg |
| Japan | - | neg | - | neg | neg |
| Denmark | neg | 二 | neg | - | neg |
| Total Developed | 23 | 24 | 17 | 46 | 32 |

OTHER

| Spain | neg | - | - | - | 4 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Portugal | neg | 1 | - | neg | neg |
| Israel | - | - | - | - | neg |
| Yugoslavia | - | - | - | neg | - |
| Total Other | neg | 1 | - | neg | 4 |
| TOTAL ALL SOURCES |  |  |  |  |  |
|  | 60 | 75 | 107 | 97 | 302 |

Totals may not add due to rounding.

## APPARENT CANADIAN MARKET

1975

$$
\begin{array}{lll}
\frac{1976}{} & \underline{1977} & \underline{1978} \\
--0 & \text { garments --- }
\end{array}
$$

1979

| Domestic Shipments ${ }^{(1)}$ | 32,772 | 32,747 | 37,173 | 38,611 | 40,020 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Less Exports ${ }^{(I)}$ | 560 | 302 | 775 | 544 | 558 |
| Net Domestic Shipments | 32,212 | 32,445 | 36,398 | 38,067 | 39,462 |
| Imports ${ }^{\text {(13) }}$ | 21,483 | 33,601 | 20,133 | 15,530 | 15,443 |
| Apparent Canadian Market | 53,695 | 66,046 | 56,531 | 53,597 | 54,905 |
| Share of Market held by | --- percent --- |  |  |  |  |
| Net Domestic Shipments | 60 | 49 | 64 | 71 | 72 |
| Imports | 40 | 51 | 36 | 29 | 28 |

# PANTS,AND SLACKS - ALL OTHER, WOMEN'S, GIRLS', MEN'S, BOYS 

IMPORTS
CONTROL NO, 37.2

SOURCE $\underline{\text { 1975* } 1976}$

RESTRAINED
China, P.R. of Hong Kong Taiwan
Korea, R. of Macao
India
Romania
Thailand
Singapore
Bulgaria
Total Restrained

UNRESTRAINED LOW-COST

| Puerto Rico | 2,144 | 1,721 | 315 | 558 |
| :--- | ---: | ---: | ---: | ---: |
| Mexico | 1,549 | 495 | 488 | 537 |
| Poland | 3 | 3 | 104 | 416 |
| Brazil | 539 | 236 | 191 | 111 |
| Czechoslovakia | 123 | 132 | 114 | 109 |
| Leew-Wind | - | - | - | 24 |
| Pakistan | 24 | 35 | 25 | 13 |
| Hungary | - | - | - | 1 |
| Philippines | 37 | 1 | 2 | 1 |
| El Salvador | - | - | - | neg |
| Ecuador | - | - | - | neg |
| Algeria | - | - | - | neg |
| Panama | 28 | 6 | 5 | - |
| Uruguay | 26 | 2 | - | - |
| Barbados | 12 | 2 | - | - |
| Argentina | 24 | 1 | - | - |
| North Korea | 46 | 1 | - | - |
| Colombia | 87 | - | - | - |
| Malawi | 9 | - | - | - |
| Malta | 8 | - | - | - |
| Nicaragua | 7 | - | - | - |
| Indonesia | 1 | - | - | - |
| Cyprus | - | neg | - | - |
| Guatemala | - | neg | - | - |


| Total Unrestrained |  | 4,667 | 2,635 | 1,244 | 1,770 |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  |  | 4,667 | 2,635 |  | 1,770 |

# PANTS, AND SLACKS - ALL OTHER, WOMEN'S, GIRLS', MEN'S, BOYS 

IMPORTS (Continued)

| SOURCE | 1975* | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| DEVELOPED |  |  | --- '000 garments --- |  |  |
| U.S.A. |  | 3,370 | 2,519 | 712 | 1,464 |
| France |  | 148 | 149 | 199 | 233 |
| Italy |  | 33 | 43 | 64 | 91 |
| United Kingdom |  | 36 | 29 | 37 | 30 |
| Japan |  | 162 | 49 | 41 | 29 |
| Germany, West |  | 25 | 46 | 38 | 21 |
| Austria |  | 14 | 18 | 7 | 17 |
| Switzerland |  | 4 | 6 | 8 | 17 |
| Sweden |  | 7 | 8 | 28 | 14 |
| Finland |  | 1 | 1 | 3 | 2 |
| Netherlands |  | 5 | 1 | - | 2 |
| New Zealand |  | - | neg | 1 | 1 |
| South Africa |  | - | neg | , | 1 |
| Australia |  | 3 | - | neg | 1 |
| Norway |  | 7 | 1 | 1 | 1 |
| Ireland |  | neg | neg | neg | neg |
| Denmark |  | 1 | 2 | neg | neg |
| Belgium |  | 1 | 1 | neg | neg |
| Total Developed | - | 3,757 | 2,873 | ,142 | 1,924 |

OTHER

| Spain |  | 758 | 637 | 639 | 888 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Israel |  | 54 | 6 |  | 5 |
| Portugal |  | 6 | neg | neg | 1 |
| Greece |  | - |  | neg | neg |
| Yugoslavia |  | - | - | neg | - |
| Total Other | - | 818 | 644 | 640 | 894 |
| TOTAL ALL SOURCES | - | 33,601 | 20,133 | 15,530 | 15,443 |
| *Not available. |  |  |  |  |  |

$1975 \quad \underline{1976} \underset{ }{-\ldots} \quad \underline{1977} \quad \underline{1979}$

| Domestic Shipments (1) | 3,908 | 2,889 | 2,446 | 2,545 | 1,907 |
| :--- | ---: | :--- | :--- | :--- | :--- |
| Less Exports (1) | nil | $\underline{\text { nil }}$ | $\underline{\text { nil }}$ | $\underline{\text { nil }}$ | nil |
| Net Domestic Shipments | 3,908 | 2,889 | 2,446 | 2,545 | 1,907 |
| Imports (13) | $\underline{3,688}$ | $\underline{6,270}$ | $\underline{4,114}$ | $\underline{3,329}$ | $\underline{3,470}$ |
| Apparent Canadian Market | 7,596 | 9,159 | 6,560 | 5,874 | 5,377 |


| Share of Market held by | --- percent --- |  |  |  |  |
| :--- | :---: | :---: | :---: | :---: | :---: |
| Net Domestic Shipments | 51 | 32 | 37 | 43 | 35 |
| Imports | 49 | 68 | 63 | 57 | 65 |

## SHORTS - WOMEN'S, GIRLS', MEN'S, BOYS'

IMPORTS

| SOURCE | 1975* | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| RESIIRAINED | -.-- '000 garments .-- |  |  |  |  |
| Taiwan |  | 2,354 | 1,853 | 1,227 | 1,195 |
| China, P. R. of |  | 1,078 | 732 | 425 | 708 |
| Hong Kong |  | 1,477 | 815 | 818 | 479 |
| Korea, R. of |  | 724 | 340 | 394 | 155 |
| India |  | - | 14 | 2 | 34 |
| Thailand |  | neg | 1 | 3 | 26 |
| Macao |  | - | - | - | 19 |
| Singapore |  | 46 | 5 | neg | 12 |
| Romania |  | 7 | - | neg | - |
| Bulgaria |  | - | $\underline{-}$ | - | - - |
| Total Restrained | - | 5,686 | 3,760 | 2,869 | 2,628 |

UNRESTRAINED LOW-COST

| Leew-Wind | - | - | - | 65 |
| :--- | ---: | ---: | ---: | ---: |
| Poland | - | - | 69 | 58 |
| Hungary | - | - | - | 24 |
| Brazil | $-\overline{4}$ | - | - | 15 |
| Mexico | 54 | 1 | 1 | 6 |
| Philippines | - | - | - | 2 |
| Malaysia | - | 12 | - | - |
| Czechoslovakia | 11 | - | - | - |
| Colombia | 5 | - | - | - |
| Pakistan | - | neg | - | - |
| Total Unrestrained |  |  |  |  |
| Low-Cost |  | 70 | 13 | 70 |



|  | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | --- '000 garments --- |  |  |  |  |
| Domestic Shipments ${ }^{(1)}$ | 2,342 | 1,418 | 1,415 | 1,372 | 1,324 |
| Less Exports ${ }^{(1)}$ | nil | $\underline{\text { nil }}$ | nil | $\underline{n i l}$ | nil |
| Net Domestic Shipments | 2,342 | 1,418 | 1,415 | 1,372 |  |
| Imports (13) | 830 | 1,421 | 1,077 | 598 | 851 |
| Apparent Canadian Market | 3,172 | 2,839 | 2,492 | 1,970 | 2,175 |
| Share of Market held by |  |  | ercent |  |  |
| Net Domestic Shipments | 74 | 50 | 57 | 70 | 61 |
| Imports | 26 | 50 | 43 | 30 | 39 |

IMPORTS
CONTROL NO. 37.4

| SOURCE | 1975* | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| RESTRAINED |  | --- '000 garments --- |  |  |  |
| China, P.R. of |  | 478 | 369 | 246 | 535 |
| Hong Kong |  | 326 | 372 | 107 | 91 |
| Taiwan |  | 183 | 174 | 138 | 3 |
| India |  | - | neg | 2 | 1 |
| Korea, R. of |  | 17 | 1 | - | - |
| Romania |  | - | - | - | - |
| Macao |  | - | - | - |  |
| Thailand |  | - | - | - | - |
| Bulgaria |  | - | - | - | - |
| Singapore |  | - | - | - | - |
| Total Restrained | - | 1,004 | 916 | 493 | 630 |

UNRESTRAINED LOW-COST

| Mexico | 5 | - | - | 1 |
| :--- | ---: | ---: | ---: | ---: |
| Philippines | - | 1 | 1 | - |
| Pakistan | - | neg | - | - |

Total Unrestrained $\begin{array}{lllllll}\text { Low-Cost } & - & 5 & 1 & 1 & 1\end{array}$
IMPORTS (Continued)
CONTROL NO. 37.4

| SOURCE | 1975* | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| DEVELOPED |  |  | --- '000 garments --- |  |  |
| U.S.A. |  | 406 | 157 | 92 | 207 |
| United Kingdom |  | 1 | 1 | 10 | 9 |
| France |  | 1 | neg | 2 | 2 |
| Italy |  | neg | neg | neg | 1 |
| Austria |  | - | neg | - | neg |
| Sweden |  | neg | neg | neg | neg |
| Norway |  | - | - | neg | neg |
| Finland |  | - | - | - | neg |
| Japan |  | 3 | neg | - | neg |
| Germany, West |  | - | neg | neg | - |
| Total Developed |  | 411 | 158 | 104 | 219 |

OTHER - -
$\begin{array}{llllll}\text { TOTAL ALL SOURCES } & \text { 1,421 } 1,077 & 598\end{array}$
*Not available.
Totals may not add due to rounding.

|  | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Domestic Shipments (1) | --- '000 garments --- |  |  |  |  |
|  | 5,671 | 6,376 | 8,485 | 7,308 | 9,030 |
| Less Exports ${ }^{(1)}$ | 167 | 248 | 246 | 183 | 286 |
| Net Domestic Shipments | 5,504 | 6,128 | 8,239 | 7,125 | 8,744 |
| Imports ${ }^{(13)}$ | 1,448 | $\underline{1,837}$ | 1,745 | 4,117 | 3,299 |
| Anparent, Canadian Market | 6,952 | 7,965 | 9,984 | 11,242 | 12,043 |
| Share of Market held by --- percent |  |  |  |  |  |
| Net Domestic Shipments | 79 | 77 | 83 | 63 | 73 |
| Imports | 21 | 23 | 17 | 37 | 27 |

PANTS, SLACKS, SHORTS, OVERALLS COVERALLS - CHILDREN'S AND INFANTS' ( $0-6 x$ )

IMPORTS

| SOURCE | 1975* | 1976 | 1977 | $\underline{1978}$ | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| RESTRAINED |  | --- '000 garments --- |  |  |  |
| Hong Kong |  | 505 | 377 | 1,060 | 902 |
| Taiwan |  | 618 | 516 | 1,273 | 880 |
| China, P.R. of |  | 223 | 522 | 1,009 | 705 |
| Macao |  | - | 14 | 6 | 37 |
| Korea, R. of |  | 144 | 11 | 229 | 21 |
| Thailand |  | - | - | - | 16 (7) |
| Singapore |  | - | - | 2 | $3(3+7)$ |
| Romania |  | - | - | - | neg |
| Bulgaria |  | - | - | - | - |
| India |  | - | - | - | - |
| Total Restrained | - | 1,490 | 1,440 | 3,579 | 2,564 |

UNRESTRAINED LOW-COST

| Philippines | - | neg | 91 | 83 |
| :--- | ---: | ---: | ---: | ---: |
| Poland | - | - | - | 49 |
| Brazil | - | - | - | 12 |
| Sri Lanka | - | - | - | 10 |
| Czechoslovakia | 16 | 26 | 26 | 7 |
| Mexico | - | - | -1 | - |

Total Unrestrained $\begin{array}{llllll}\text { Low-Cost } & \text { - } & 16 & 26 & 118 & 166\end{array}$

PANTS, SLACKS, SHORTS, OVERALLS COVERALLS - CHILDREN'S AND INFANTS ${ }^{(0-6 x}$ )

| IMPORTS (Continued) |  |  |  | CONTR | NO, 3 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| SOURCE | 1975* | 1976 | 1977 | 1978 | 1979 |
| DEVELOPED |  | --- '000 garments --- |  |  |  |
| U.S.A. |  | 309 | 238 | 231 | 291 |
| France |  | 5 | 12 | 83 | 109 |
| Germany, West |  | 1 | 1 | 11 | 58 |
| Japan |  | 9 | 6 | 56 | 50 |
| Italy |  | 5 | 10 | 14 | 15 |
| Netherlands |  | - | - | neg | 5 |
| Sweden |  | - | - | 2 | 4 |
| Austria |  | 1 | 5 | 6 | 3 |
| United Kingdom |  | 1 | neg | 1 | 2 |
| Switzerland |  | - | - | 1 | 2 |
| Denmark |  | - | - | - | neg |
| Finland |  | - | neg | 1 | - |
| Belgium |  | - | neg | - | - |
| Total Developed | - | 331 | 272 | 406 | 539 |
| OTHER |  |  |  |  |  |
| Israel |  | 1 | 6 | 11 | 18 |
| Spain |  | - | neg | 2 | 10 |
| Portugal |  | - | - | 1 | 1 |
| Greece |  | - | - | $\underline{1}$ | 1 |
| Total Other | - | 1 | 6 | 15 | 30 |
| TOTAL ALL SOURCES | - | 1,837 | 1,745 | 4,117 | 3,299 |
| *Not available. |  |  |  |  |  |

DEFINITION

This industry is comprised of three sectors:
a) structured sportcoats and blazers
b) structured suits
c) unstructured suits

The structured suit-jacket, sportcoat or blazer must contain at least two of the following three elements or their equivalents: 1) lining
2) shoulder padding
3) front stiffening

Suits which do not contain at least two of the three elements or their equivalents are considered to be unstructured suits.

## SECTOR PROFILE

- Based on the latest statistics available (1976), the Canadian men's and boys' suit, sportcoat and blazer industry is comprised of 93 establishments.
- These establishments were primarily located in Québec (68 percent), Ontario (15 percent), Manitoba (6 percent) and British Columbia (5 percent).
- Major centres of production in order of importance are Montréal (63 percent), Toronto ( 12 percent) and Winnipeg ( 6 percent).
- In 1979, structured suits accounted for 61 percent of shipments, sportcoats and blazers 33 percent, and unstructured suits only 6 percent in unit terms.
- There are no published data available on total employment in this sector. The Textile and Clothing Board inquiry of May 14, 1975 determined that the numbers of employees in the men's fine clothing industry in 1974 was as follows: Québec 8,663, Ontario 2,809, other provinces 500 for a total of ll,972.
- Shipments of structured sportcoats and blazers (Control No. 47.1) increased by 33 percent in 1979 compared to 1978. This increase is consistent with the shift in fashion to more casual wear, and follows two years of below average shipments. 1979 shipments are still below 1975 levels. Structured suits (Control No. 47.2) showed zero growth and unstructured suits (Control No. 38) declined by 19 percent.

|  | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | --- '000 garments --- |  |  |  |  |
| Domestic Shipments ${ }^{(1)}$ | 4,166 | 4,229 | 4,203 | 3,726 | 3,991 |
| Less Exports ${ }^{(1)}$ | 148 | $\underline{158}$ | 108 | 79 | 62 |
| Net Domestic Shipments | 4,018 | 4,071 | 4,095 | 3,647 | 3,929 |
| Imports (8) | 1,107 | 1, 730 | 1,2140 | 1,061 | 1,343 |
| Apparent Canadian Market | 5,125 | 5,801 | 5,235 | 4,708 | 5,272 |
| Share of Market held by |  |  | ercent |  |  |
| Net Domestic Shipments | 78 | 70 | 78 | 77 | 75 |
| Imports | 22 | 30 | 22 | 23 | 25 |

## UNSTRUCTURED SUITS - STRUCTURED SPORTCOATS \& BLAZERS, STRUCTURED SUITS

| IMPORTS |
| :--- | ---: | :--- | :--- | :--- | :--- | :--- |

UNRESTRAINED LOW-COST

| China, P. R. of | - | 10 | 6 | 3 | 72 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Romania | - | 8 | - | - | 40 |
| Poland | - | - | - | 4 | 37 |
| Hungary | - | neg | neg | 1 | 20 |
| Czechoslovakia | 15 | 24 | 17 | 13 | 16 |
| India | neg | 1 | neg | 1 | 10 |
| Colombia | 8 | 10 | 9 | - | 9 |
| Sri Lanka | - | - | - | - | 8 |
| Singapore | - | - | 2 | - | 5 |
| Philippines | - | - | - | 6 | 5 |
| Uruguay | - | neg | - | neg | 1 |
| Brazil | 7 | 10 | - | - | neg |
| Korea, North | - | - | 3 | - | - |
| Malaysia | 1 | neg | neg | - | - |
| Parama | 4 | - | - | - | - |
| El Salvador | 1 | - | - | - | - |
| Turkey | neg | neg | - | - | - |
| Morocco | neg | neg | - | - | - |
| Thailand | neg | neg | - | - | - |
| Pakistan | neg | neg | - | - | - |
| Virgin Islands | - | - | neg | - | - |
| Argentina | - | neg | - | - | - |
| Iran | neg |  | - | - | - |
| tal Unrestrained ow-Cost | 36 | 63 | 37 | 28 | 223 |

## UNSTRUCTURED SUITS - STRUCTURED SPORTCOATS \& BLAZERS, STRUCTURED SUITS

IMPORTS (Continued)

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| DEVELOPED | . 000 garments --- |  |  |  |  |
| Italy | 20 | 23 | 28 | 49 | 63 |
| France | 55 | 41 | 35 | 48 | 55 |
| U.S.A. | 13 | 16 | 21 | 43 | 39 |
| United Kingdom | 13 | 16 | 9 | 10 | 8 |
| Sweden | 2 | 4 | 3 | 6 | 6 |
| Germany, West | 4 | 7 | 2 | 3 | 3 |
| Ireland | 1 | 1 | ner | neg | 3 |
| Belgium | 3 | 4 | 2 | 1 | 2 |
| Iceland | 1 | 2 | 1 | neg | 1 |
| Finland | neg | neg | neg | neg | 1 |
| Netherlands | neg | 2 | neg | neg | 1 |
| South Africa | 3 | 4 | 4 | 7 | 1 |
| Japan | 6 | 13 | 88 | 2 | 1 |
| Switzerland | 2 | 1 | 1 | 1 | 1 |
| Austria | 3 | 1 | 1 | 1 | neg |
| Denmark | neg | neg | neg | neg | neg |
| Norway | 2 | 1 | 2 | neg | - |
| Australia |  | - | neg | - | - |
| Total Developed | 128 | 136 | 197 | 171 | 185 |

OTHER

| Spain | 2 | 2 | neg | 1 | 1 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Yugoslavia | 11 | 6 | 4 | neg | 1 |
| Greece | 1 | 1 | 1 | - | neg |
| Portugal | neg | 1 | neg | neg | neg |
| Israel | -1 | -4 | $n e g$ | $-n e g$ | - |
| Total Other | 17 | 24 | 5 | 1 | 2 |
|  |  |  |  |  |  |
| TOTAL ALL SOURCES | 1,107 | 1,730 | 1,140 | 1,061 | 1,343 |

Totals may not add due to rounding.

| 1975 | 1976 | 1971 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: |
|  |  | garme |  |  |


| Domestic Shipments ${ }^{(1)}$ | 424 | 524 | 372 | 298 | 240 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Less Exports ${ }^{(1)}$ | nil | nil | nil | nil | nil |
| Net Domestic Shipments | 424 | 524 | 372 | 298 | 240 |
| Imports ${ }^{\text {(8) }}$ | 538 | 924 | 600 | 384 | 478 |
| Apparent Canadian Market | 962 | 1,448 | 972 | 682 | 718 |

Share of Market held by

| Net Domestic Shipments | 44 | 36 | 38 | 44 | 33 |
| :--- | :--- | :--- | :--- | :--- | :--- |
| Imports | 56 | 64 | 62 | 56 | 67 |

IMPORTS
CONTROL NO, 38

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| RESTRAINED | --- '000 garments --- |  |  |  |  |
| Taiwan | 212 | 572 | 247 | 140 | 130 |
| Korea, R. of | 212 | 232 | 200 | 152 | 73 |
| Hong Kong | 82 | 50 | 50 | 27 | 27 |
| Macao | - | - | - | - | 4 |
| Total Restrained | 506 | 854 | 497 | 319 | 234 |

UNRESTRAINED LOW-COST

| China, P. R. of | - | 10 | 6 | 3 | 72 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Romania | - | 8 | - | - | 40 |
| Poland | - | - | - | 4 | 37 |
| Hungary | - | $n e g$ | neg | 1 | 20 |
| Philippines | - | - | - | 6 | 5 |
| Singapore | - | - | 2 | - | 5 |
| Czechoslovakia | - | - | - | - | 2 |
| India | neg | neg | neg | neg | 2 |
| Colombia | - | 2 | - | - | neg |
| Korea, North | - | - | - | - | - |
| Otal Unrestrained |  |  |  |  |  |
| Oow-Cost | neg | 20 | 10 | 14 | 183 |

## UNSTRUCTURED SUITS

| IMPORTS (Continued) |  |  | CONTROL NO, 33 |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| DEVELOPED |  | -- | garm | --- |  |
| Italy | 11. | 1.1 | 15 | 23 | 23 |
| U.S.A. | 5 | 10 | 9 | 11 | 17 |
| France | 10 | 14 | 10 | 10 | 9 |
| Sweden | 1 | 1 | 1 | neg | 5 |
| United Kingdom | 2 | 3 | 3 | 3 | 3 |
| Germany, West | - | 1 | neg | neg | 1 |
| Belgium | 1 | 2 | 1 | neg | 1 |
| Switzerland | neg | neg | neg | neg | neg |
| Austria | neg | neg | neg | neg | neg |
| Ireland | neg | neg | neg | neg | neg |
| South Africa | 1 | 2 | 1 | 1 | neg |
| Finland | neg | neg | - | - | neg |
| Japan | - | 2 | 50 | neg | - |
| Norway | 1 | 1 | 1 | neg | - |
| Netherlands | neg | neg | - | neg | - |
| Denmark | neg | neg | - | $\cdots$ | - |
| Total Developed | 32 | 47 | 91 | 48 | 59 |
| OTHER |  |  |  |  |  |
| Greece | neg | 1 | 1 | - | neg |
| Spain | neg | neg | - | - | neg |
| Portugal | neg | neg | neg | neg | = |
| Total Other | - | 1 | 1 | - | - |
| TOTAL ALL SOURCES | 538 | 924 | 600 | 384 | 478 |

Totals may not add due to rourding.

# STRUCTURED SPORTCOATS, BLAZERS AND STRUCTURED SUITS 

## APPARENT CANADIAN MARKET <br> CONTROL NO. 47



| (1) | 3,742 | 3,705 | 3,831 | 3,428 | 3,751 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Domestic Shipments |  |  |  |  |  |
| Less Exports (1) | $\underline{148}$ | $\underline{158}$ | $\underline{108}$ | -79 | -62 |
| Net Domestic Shipments | 3,594 | 3,547 | 3,723 | 3,349 | 3,689 |
| Imports ${ }^{(8)}$ | $\underline{569}$ | $\underline{807}$ | $\underline{540}$ | $\underline{677}$ | -865 |
| Apparent Canadian Market | 4,163 | 4,354 | 4,263 | 4,026 | 4,554 |


| Share of Market held by | --- percent --- |  |  |  |  |
| :--- | :---: | :---: | ---: | :---: | ---: |
| Net Domestic Shipments | 86 | 81 | 87 | 83 | 81 |
| Imports | 14 | 19 | 13 | 17 | 19 |

## APPARENT CANADIAN MARKET

## $\underline{1975} \frac{1976}{} \underline{1977} \underline{1978} \underline{1979}$

| Domestic Shipments ${ }^{(1)}$ | 1,354 | 1,441 | 1,294 | 1,000 | 1,333 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Less Exports ${ }^{(1)}$ | nil | nil | nil | nil | nil |
| Net Domestic Shipments | 1,354 | 1,441 | 1,294 | 1,000 | 1,333 |
| Imports ${ }^{\text {(8) }}$ | 124 | 163 | 160 | 203 | 292 |
| Apparent Canadian Market | 1,478 | 1,604 | 1,454 | 1,203 | 1,625 |


| Share of Market held by | --- percent --- |  |  |  |  |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Net Domestic Shipments | 92 | 90 | 89 | 83 | 82 |
| Imports | 8 | 10 | 11 | 17 | 18 |

# STRUCTURED SPORTCOATS \&,BLAZERS <br> - MEN'S AND BOYS' 

IMPORTS

CONTROL NO, 47.1
$1975 \quad \underline{1976} \underline{1977} \quad \underline{1979}$
_-- '000 garments ---

| 32 | 36 | 74 | 40 | 77 |
| ---: | ---: | ---: | ---: | ---: |
| - | - | - | - | 27 |
| - | - | - | - | 26 |
| - | - | $n e g$ | 10 | 25 |
| 12 | 13 | 3 | 10 | 16 |
| 33 | 55 | 14 | 51 | 13 |
| 2 | 2 | 2 | 6 | 6 |
| - | - | - | - | 2 |
| 1 | 1 | 1 | $n e g$ | 1 |
| - | - | - | - | 1 |
| 14 | 10 | - | - | - |
| 94 | 117 | 101 | 117 | 194 |

UNRESTRAINED LOW-COST

| Sri Lanka | - | - | - | - | 8 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| India | neg | neg | neg | neg | 8 |
| Czechoslovakia | 6 | 15 | 15 | 10 | 7 |
| Colombia | - | - | - | - | 5 |
| Uruguay | - | neg | - | - | 1 |
| Turkey | neg | neg | - | - | - |
| Pakistan | - | neg | - | - | - |
| Brazil | - | neg | - | - | - |
| El Salvador | 1 | - | - | - | - |
| Panama | 4 | - | - | - | - |
| otal Unrestrained |  |  |  |  |  |
| ow-Cost | 11 | 15 | 15 | 10 | 29 |


| IMPORTS (Continued) |  |  |  | CONTROL NO, 47,1 |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
| SOURCES | 1975 | 1976 | 1977 | 1978 | 1979 |
| DEVELOPED |  | --- | garme | -- |  |
| France | 2 | 2 | 8 | 19 | 23 |
| Italy | 2 | 3 | 5 | 14 | 19 |
| U.S.A. | 2 | 2 | 9 | 28 | 16 |
| United Kingdom | 2 | 2 | 3 | 4 | 3 |
| Ireland | neg | neg | neg | neg | 3 |
| Germany, West | neg | 2 | 1 | 2 | 2 |
| Belgium | neg | neg | neg | neg | 1 |
| Finland | neg | neg |  | neg | 1 |
| Iceland | 1 | 2 | 1 | neg | 1 |
| Netherlands | neg | neg | neg | - | 1 |
| Japan | 6 | 10 | 12 | 2 | 1 |
| Austria | - | - | - | neg | neg |
| Denmark | neg | neg | - | - | neg |
| Sweden | neg | 1 | 1 | 3 | neg |
| Switzerland | neg | neg | neg | neg | neg |
| South Africa | 2 | 3 | 2 | 2 | neg |
| Australia | - | - | neg | - | - |
| Total Developed | 17 | 27 | 42 | 74 | 71 |

## OTHER

| Greece | - | - | - | - | neg |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Portugal | - | - | - | - | neg |
| Yugoslavia | neg | 1 | 1 | - | neg |
| Spain | $n e g$ | $n e g$ | - | 1 | - |
| Israel | $n e g$ | 1 | $n e g$ | - | - |
| Total Other | neg | 2 | 1 | 1 | neg |
| TOTAL ALL SOURCES |  |  |  |  |  |

Totals may not add due to rounding.

# STRUCTURED SUITS <br> - MEN'S AND BOYS' 

| Domestic Shipments ${ }^{(1)}$ | 2,388 | 2,264 | 2,537 | 2,428 | 2,418 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| $\text { Less Exports }{ }^{(1)}$ | 148 | 158 | 108 | 79 | 62 |
| Net Domestic Shipments | 2,240 | 2,106 | 2,429 | 2,349 | 2,356 |
| Imports ${ }^{\text {(8) }}$ | 445 | 644 | 380 | 474 | 573 |
| Apparent Canadian Market | 2,685 | 2,750 | 2,809 | 2,823 | 2,929 |
| Share of Market held by | --- percent --- |  |  |  |  |
| Net Domestic Shipments | 83 | 77 | 86 | 83 | 80 |
| Imports | 17 | 23 | 14 | 17 | 20 |


| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| RESTRAINED |  | '000 garments --- |  |  |  |
| Korea, R. of | 170 | 306 | 175 | 238 | 170 |
| Poland | 37 | 3 | 20 | 57 | 127 |
| Taiwan | 28 | 60 | 36 | 97 | 81 |
| Romania | 54 | 75 | 40 | - | 62 |
| Hungary | 7 | 9 | 6 | 22 | 34 |
| Hong Kong | 12 | 66 | 20 | 10 | 15 |
| Bulgaria | - | - | - | - | 12 |
| Philippines | 6 | 7 | 1 | 1 | 5 |
| Macao | - | - | - | - | 2 |
| Singapore | neg | 14 | - | - |  |
| China, P.R. of | 12 | 6 | 2 | - | - |
| Total Restrained | 326 | 546 | 300 | 425 | 508 |

UNRESTRAINED LOW-COST

| Czechoslovakia | 9 | 9 | 2 | 3 | 7 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Colombia | 8 | 8 | 9 | - | 4 |
| Brazil | 7 | 10 | - | - | neg |
| Uruguay | - | neg | - | neg | neg |
| Iran | neg | - | - | - | - |
| Morocco | neg | neg | - | - | - |
| India | neg | neg | neg | neg | - |
| Malaysia | 1 | neg | neg | - | - |
| Pakistan | neg | - | - | - | - |
| Korea, North | - | - | 1 | - | - |
| Thailand | neg | neg | - | - | - |
| Argentina | - | neg | - | - | - |
| Ecuador | - | neg | - | - | - |
| Virgin Islands | - | - | neg | - | - |
| Other | - | neg | - | - | - |
| Total Unrestrained |  |  |  |  | - |
| Low-Cost |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  | 3 |

STRUCTURED SUITS

- MEN'S AND BOYS'


## IMPORTS (Continued)

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| DEVELOPED | --- '000 garments --- |  |  |  |  |
| France | 43 | 25 | 17 | 19 | 24 |
| Italy | 8 | 9 | 8 | 12 | 21 |
| U.S.A. | 6 | 4 | 3 | 4 | 6 |
| United Kingdom | 8 | 10 | 3 | 3 | 2 |
| Sweden | 1 | 2 | 1 | 2 | 1 |
| Ireland | neg | neg | neg | neg | neg |
| Belgium | 2 | 2 | 1 | 1 | neg |
| Finland | neg | neg | neg | - | neg |
| Germany, West | 4 | 4 | 1 | 1 | neg |
| Netherlands | neg | 1 | - | - | neg |
| Switzerland | 1 | neg | neg | neg | neg |
| South Africa | neg | neg | 1 | 4 | neg |
| Japan | 1 | 1 | 26 | - | neg |
| Austria | 3 | 1 | 1 | neg | - |
| Denmark | neg | neg | neg | neg | - |
| Norway | 1 | neg | 1 | neg | - |
| Total Developed | 78 | 59 | 63 | 46 | 54 |

OTHER

| Yugoslavia | 10 | 5 | 3 | neg | 1 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Portugal | neg | 1 | neg | neg | neg |
| Spain | 2 | 1 | neg | neg | neg |
| Greece | neg | neg | - | - | - |
| Israel | 2 | 3 | neg | neg | - |
| Total Other | 14 | 10 | 3 | neg | 1 |
| TOTAL ALI SOURCES | 445 | 644 | 380 | 474 | 573 |

Totals may not add due to rounding.

## DEFINITION

39.1 BLOUSES AND SHIRTS (Women's, Girls') Garments covering the upper part of the body whether knitted or woven, excluding underwear, jackets, T-shirts, sweatshirts, and sweaters.
(Note: Men's and boys' shirts are contained in Control No. 49) .
39.2 T-SHIRTS (Women's, Girls', Men's, Boys')

A knitted garment covering the upper part of the body, of construction 19 cut or finer, i.e. 19 or more vertical stitches per inch.
39.3 SWEATSHIRTS (Women's, Girls', Men's, Boys')

A garment covering the upper part of the body, at least one side of which is brushed or fleeced.

Note: The definition of $T$-shirts, and sweatshirts for men and boys are subject to the overriding definition of men's or boys' shirts with tailored or full-fashioned collar (See Control Item No. 49).
39.4 BLOUSES AND SHIRTS, T-SHIRTS, SWEATSHIRTS, CHILDREN'S AND INFANTS' ( $0-6 \mathrm{x}$ )
As defined above.

## SECTOR PROFILE

- Based on the latest statistics available (1976) the Canadian industry producing apparel defined in Control No. 39 consists of 148 establishments.
- Based on establishments reporting production of this range in 1976 the regional distribution was:

103 Québec: 70\%
32 Ontario: 22\%
13 Other: 8\%

- Domestic shipments of blouses (Control 39.1) increased by 5.6 percent in 1979 over 1978 , but are still 36 percent below 1975 levels.
- The rate of increase of domestic shipments of T-shirts (Control No. 39.2) decreased in 1979. At 10 percent, the rate of increase was one-half the 1975-1979 yearly average of 20 percent.
- Despite a 19 percent increase in domestic shipments of sweatshirts (Control No. 39.3) in 1979 over 1978, 1979 shipments are still below 1975 levels.


## APPARENT CANADIAN MARKET

|  | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  |  | - | 00 garme | --- |  |
| Domestic Shipments ${ }^{(1)}$ | 46,324 | 38,136 | 40,419 | 42,139 | 45,165 |
| Less Exports ${ }^{(1)}$ | 83 | 89 | 109 | 99 | 122 |
| Net Domestic Shipments | 46,241 | 38,047 | 40,310 | 42,040 | 45,043 |
| Imports ${ }^{\text {(8) }}$ | 57,219 | 77,247 | 52,892 | 57,531 | 54,262 |
| Apparent Canadian Market | 103,460 | 115,294 | 93,202 | 99,571 | 99,305 |
| Share of Market held by |  |  | percent |  |  |
| Net Domestic Shipments | 45 | 33 | 43 | 42 | 45 |
| Imports | 55 | 67 | 57 | 58 | 55 |

## BLOUSES \& SHIRTS - T-SHIRTS, SWEATSHIRTS

IMPORTS

| SOURCE | $\underline{1975}$ | 19.76 | 1977 | 1978 | 1979 | $\begin{gathered} \text { Restraint } \\ \text { levels } \\ 1981 \\ \hline \end{gathered}$ |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| RESTRAINED |  |  | -.-. '000 | garments |  |  |
| Taiwan | 19,761 | 28,631 | 15,066 | 18,899 | 18,361 | 20,890 |
| Hong Kong | 9,207 | 13,140 | 11,862 | 13,687 | 11,036 | 10,878 |
| Korea, R. of | 7,781 | 9,842 | 10,377 | 10,610 | 7,337 | 9,662 |
| China, P. R. of | 3,572 | 6,583 | 4,719 | 4,288 | 5,142 | 5,377(5) |
| India | 2,361 | 4,442 | 1,786 | 1,395 | 2,306 | 3,286(19) |
| Malaysia | 9.13 | 853 | 402 | 397 | 674 | 708 |
| Poland | 401 | 1,120 | 1,367 | 1,940 | 657 | 655 |
| Singapore | 518 | 246 | 59 | 82 | 596 | (1) $955(3+19)$ |
| Romania | 492 | 723 | 120 | 163 | 508 | 681 |
| Philippines | 226 | 356 | 219 | 144 | 475 | 191(15+16) |
| Thailand | 62 | 94 | 6 | 49 | 164 | 424(19) |
| Macao | 12 | 18 | 50 | 99 | 111 | 224(19) |
| Bulgaria | - | - | - | neg | - - | 135 |
| Total Restrained | 45,306 | 66,048 | 46,033 | 51,753 | 47,367 | 54,066(4+20) |

## BLOUSES \& SHIRTS - T-SHIRTS, SWEATSHIRTS



## BLOUSES \& SHIRTS - T-SHIRTS, SWEATSHIRTS



CONTROL NO. 39

SOURCE
DEVELOPED
U.S.A.

Italy
France
Japan
United Kingdom
Germany, West
Finland
Austria
Netherlands
South Africa
Sweden
Ireland
Switzerland
Belgium
Denmark
Norway
Iceland
Australia
New Zealand
Total Developed
OTHER

| Portugal | 445 | 301 | 61 | 71 | 224 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Greece | 27 | 22 | 32 | 65 | 71 |
| Israel | 130 | 204 | 135 | 36 | 12 |
| Spain | 34 | 22 | 3 | 10 | 8 |
| Yugsolavia | 17 | 3 | - | - | - |
| Total Other | 653 | 552 | 231 | 182 | 315 |
|  |  |  |  |  |  |
| TOTAL ALL SOURCES | 56,683 | 77,247 | 52,892 | 57,531 | 54,262 |

Totals may not add due to rounding.

|  | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | --- '000 garments --- |  |  |  |  |
| Domestic Shipments ${ }^{(1)}$ | 25,756 | 15,759 | 15,981 | 15,630 | 16,510 |
| Less Exports ${ }^{(1)}$ | nil | nil | nil | nil | nil |
| Net Domestic Shipments | 25,756 | 15,759 | 15,981 | 15,630 | 16,510 |
| Imports ${ }^{(8)}$ | 24,500 | 27,867 | 19,189 | 22,270 | 25,336 |
| Apparent Canadian Market | 50,256 | 43,626 | 35,170 | 37,900 | 41,846 |
| Share of Market held by |  |  | percent |  |  |
| Net Domestic Shipments | 51 | 36 | 45 | 41 | 39 |
| Imports | 49 | 64 | 55 | 59 | 61 |

## BLOUSES \& SHIRTS - WOMEN's \& GIRLS'

## IMPORTS

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| RESTRAINED | --- '000 garments --- |  |  |  |  |
| Taiwan | 8,208 | 10,656 | 5,249 | 7,811 | 8,030 |
| Hong Kong | 5,838 | 6,381 | 5,789 | 5,959 | 6,480 |
| Korea, R. of | 3,510 | 3,877 | 4,459 | 4,478 | 3,726 |
| India | 1,629 | 3,050 | 1,235 | 1,226 | 1,943 |
| Malaysia | 913 | 853 | 402 | 344 | 674 |
| China, P. R. of | 426 | 396 | 106 | 112 | 454 |
| Singapore | 138 | 64 | 53 | 33 | 317 (3) |
| Philippines | 106 | 141 | 61 | 41 | 195 |
| Thailand | 62 | 92 | 5 | 49 | 78 |
| Macao | - | - | 21 | 36 | 48 |
| Bulgaria | - | - | - | neg | - |
| Total Restrained | 20,830 | 25,510 | 17,380 | 20,089 | 21,945 |




|  | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | '000 garments |  |  |  |  |
| Domestic Shipments ${ }^{(1)}$ | 10,719 | 12,321 | 15,127 | 17,512 | 19,250 |
| Less Exports ${ }^{(1)}$ | 83 | 89 | 109 | 99 | 122 |
| Net Domestic Shipments | 10,636 | 12,232 | 15,018 | 17,413 | 19,128 |
| Imports ${ }^{\text {(8) }}$ | 24,800 | 36,573 | 25,067 | 24,302 | 20,198 |
| Apparent Canadian Market | 35,436 | 48,805 | 40,085 | 41,715 | 39,326 |
| Share of Market held by --- percent |  |  |  |  |  |
| Net Domestic Shipments | 30 | 25 | 37 | 42 | 49 |
| Imports | 70 | 75 | 63 | 58 | 51 |


| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| RESTRAINED | ---- '000 garments --- |  |  |  |  |
| Taiwan | 8,311 | 12,504 | 6,097 | 6,316 | 6,943 |
| Hong Kong | 2,251 | 5,157 | 5,194 | 6,901 | 3,828 |
| China, P.R. of | 2,741 | 5,538 | 4,121 | 3,535 | 3,710 |
| Korea, R. of | 3,419 | 4,507 | 4,409 | 3,720 | 2,541 |
| India | 708 | 1,194 | 537 | 135 | 294 |
| Philippines | 80 | 175 | 69 | 91 | 265 |
| Poland | 346 | 730 | 923 | 985 | 192 |
| Singapore | 380 | 176 | 6 | 45 | 171 |
| Thailand | - | - | - | - | 84 |
| Macao | 12 | 18 | 29 | 43 | 44 |
| Romania | 399 | 367 | 29 | 48 | 20 |
| Total Restrained | 18,647 | 30,366 | 21,414 | 21,819 | 18,092 |

UNRESTRAINED LOW-COST

| Pakistan | 3,944 | 3,098 | 1,630 | 904 | 752 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Indonesia | 3 | 1 | - | - | 161 |
| Hungary | - | - | 9 | 46 | 82 |
| Moroceo | 126 | 115 | 64 | 11 | 46 |
| Turkey | 2 | 7 | 22 | - | 12 |
| Malta | - | - | - | - | 11 |
| El Salvador | - | - | - | - | 4 |
| Brazil | 1,300 | 1,013 | 158 | 101 | neg |
| Malaysia | - | 7 | 5 | - | neg |
| Mexico | 120 | 49 | neg | 1 | - |
| Colombia | 15 | 27 | - | - | - |
| Korea, North | 6 | 14 | - | - | - |
| Barbados | - | 12 | - | - | - |
| Mauritius | 10 | 1 | - | - | - |
| Afganistan | 1 | - | - | - | - |
| Total Unrestrained |  |  |  |  |  |
| Low-Cost | 5,527 | 4,344 | 1,888 | 1,063 | 1,068 |


| IMPORTS (Continued) |  |  | CONTROL NO, 30.2 |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
| SUURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| DEVELOPED |  | --- | 00 garm | s --- |  |
| U.S.A. | 514 | 687 | 440 | 649 | 325 |
| Italy | 188 | 174 | 338 | 254 | 220 |
| France | 95 | 88 | 93 | 143 | 130 |
| Japan | 368 | 488 | 664 | 196 | 91 |
| Netherlands | 3 | 2 | - | 1 | 11 |
| United Kingdom | 36 | 31 | 29 | 25 | 9 |
| Germany, West | 8 | 7 | 16 | 2 | 7 |
| Belgium | 6 | 10 | 5 | 3 | 4 |
| Iceland | - | - | - | - | 3 |
| Norway | 6 | 5 | - | - | 2 |
| Austria | 14 | - | 4 | 9 | 1 |
| Finland | neg | neg | 1 | 2 | 1 |
| Denmarl: | 2 | 3 | 18 | 3 | 1 |
| Sweden | 1 | 1 | 1 | 2 | neg |
| Switzerland | neg | neg | neg | 4 | - |
| Ireland | 3 | 10 | - | neg | - |
| Australia | - | - | 1 | - | -_ー |
| Total Developed | 1,244 | 1,506 | 1,610 | 1,293 | 805 |
| OTHER |  |  |  |  |  |
| Portugal | 300 | 243 | 17 | 43 | 205 |
| Greece | 12 | 9 | 29 | 61 | 27 |
| Israel | 60 | 88 | 109 | 18 | 1 |
| Spain | 29 | 19 | 1 | 6 | - |
| Yugoslavia | 15 | 1 | - | - - | - - |
| Total Other | 416 | 360 | 156 | 128 | 233 |
| TOTAL ALL SOURCES | 25,834 | 36,573 | 25,067 | 24,302 | 20,198 |

Totals may not add due to rounding.


| Domestic Shipments ${ }^{(1)}$ | 1,902 | 1,471 | 1,592 | 1,593 | 1,896 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Less Exports ${ }^{(1)}$ | nil | nil | nil | nil | nil |
| Net Domestic Shipments | 1,902 | 1,471 | 1,592 | 1,593 | 1,896 |
| Imports ${ }^{\text {(8) }}$ | 3,951 | 7,061 | 3,036 | 3,427 | 3,293 |
| Apparent Canadian Market | 5,853 | 8,532 | 4,628 | 5,020 | 5,189 |
| Share of Market held by | --- percent --- |  |  |  |  |
| Net Domestic Shipments | 33 | 17 | 34 | 32 | 37 |
| Imports | 68 | 83 | 66 | 68 | 63 |

SWEATS,HIRTS, - WOMEN'S, GIRLS', MEN'S, BOYS'

CONTROL NO. 39.3

SOURCE
RESTRAINED
Taiwan
Romania
Poland
China, P. R. of
Korea, R. of
Hong Kong
Singapore
Philippines
Thailand
India
Macao
Total Restrained

UNRESTRAINED LOW-COST
Hungary
Pakistan
Mexico
Malaysia
Moroceo
Brazil
Turkey
Afganistan
Guatemala
Ecuador
Total Unrestrained Low-Cost

| 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: |
| --- '000 garments --- |  |  |  |  |
| 1,746 | 2,710 | 1,418 | 1,361 | 1,200 |
| 75 | 317 | 86 | 114 | 452 |
| 40 | 361 | 429 | 939 | 436 |
| 374 | 573 | 39 | 132 | 378 |
| 559 | 1,057 | 443 | 446 | 306 |
| 643 | 997 | 360 | 164 | 70 |
| - | 6 | neg | - | 63 |
| 1 | 2 | 5 | 2 | 3 |
| - | - | - | - | 3 |
| - | 66 | neg | neg | 2 |
| - | - - | - | - | - |
| 3,438 | 6,089 | 2,780 | 3,158 | 2,913 |


| $-\overline{4}$ | - | 12 | 37 | 6 |
| ---: | ---: | ---: | ---: | ---: |
| 54 | 184 | 9 | 9 | 2 |
| neg | 2 | neg | - | 1 |
| - | 137 | - | - | - |
| 20 | - | - | 7 | - |
| 20 | 21 | - | - | - |
| - | 1 | - | - | - |
| - | 1 | - | - | - |
| - | neg | - | - | - |
| - | neg | - | - | - |
|  |  |  |  |  |
| 94 | 346 | 21 | 53 | 9 |

SWEATSHIRTS - WOMEN'S,
GIRLS', MEN'S, BOYS'

| IMPORTS (Continued) | $\begin{aligned} & \text { SWEATSHIRTS - WOMEN'S, } \\ & \text { GIRLS', MEN'S, BOYS' } \end{aligned}$ |  |  |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  |  |  | CONTROL NO, 39,3 |  |  |
| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| DEVELOPED |  | -- | 000 garm | s --- |  |
| U.S.A. | 214 | 438 | 77 | 134 | 290 |
| Italy | 22 | 37 | 22 | 30 | 33 |
| France | 24 | 42 | 5 | 12 | 32 |
| United Kingdom | 6 | 34 | 8 | 5 | 5 |
| Japan | - | 11 | 74 | - | 2 |
| New Zealand | 1 | neg | 1 | 5 | neg |
| Finland | 5 | 1 | - | - | neg |
| Germany, West | 1 | 3 | 1 | 10 | neg |
| Netherlands | 2 | 1 | 1 | - | neg |
| Ireland | neg | neg | - | - | neg |
| Belgium | neg | neg | - | - | neg |
| Sweden | 1 | neg | neg | 7 | - |
| Switzerland | 1 | 1 | neg | 1 | - |
| Denmark | neg | 1 | 1 | - | - |
| Norway | - | - | - | neg | - |
| Australia | 5 | neg | - | - | - |
| South Africa | - | - | neg | - | = |
| Total Developed | 282 | 569 | 190 | 204 | 362 |
| OTHER |  |  |  |  |  |
| Portugal | 125 | 46 | 43 | 11 | 4 |
| Israel | 3 | 10 | neg | - | 3 |
| Greece | - | - | - | - | 3 |
| Spain | 2 | 1 | 1 | - | neg |
| Total Other | 130 | 57 | 44 | 11 | 10 |
| TOTAL ALL SOURCES | 3,945 | 7,061 | 3,036 | 3,427 | 3,293 |

## BLOUSES, SHIRTS, T-SHIRTS, SWEATSHIRTS - CHILDREN'S and INFANTS' ( $0-6 \mathrm{X}$ )



| $\text { Domestic Shipments }{ }^{(1)}$ | 7,947 | 8,674 | 7,719 | 7,404 | 7,509 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Less Exports ${ }^{(1)}$ | nil | nil | nil | nil | nil |
| Net Domestic Shipments | 7,947 | 8,674 | 7,719 | 7,404 | 7,509 |
| Imports ${ }^{(8)}$ | 3,968 | 5,747 | 5,600 | -7,532 | 5,435 |
| Apparent Canadian Market | 11,915 | 14,421 | 13,319 | 14,936 | 12,944 |

Share of Market held by

| Net Domestic Shipments | 67 | 60 | 58 | 50 | 58 |
| :--- | :--- | :--- | :--- | :--- | :--- |
| Imports | 33 | 40 | 42 | 50 | 42 |

# BLOUSES, SHIRTS, T-SHIRTS, SWEATSHIRTS - CHILDREN'S 

IMPORTS

## SOURCE

RESTRAINED

## Taiwan

Korea, R. of
Hong Kong
China, P.R. of
India
Singapore
Romania
Poland
Macao
Philippines
Malaysia
Thailand
Bulgaria
Total Restrained

UNRESTRAINED LOW-COST

| Indonesia | - | - | - | - | 103 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Pakistan | 765 | 601 | 128 | 117 | 96 |
| Brazil | 120 | 105 | 92 | - | 56 |
| Haiti | - | - | - | - | 39 |
| Morocco | - | - | - | - | 6 |
| Sri Lanka | - | - | - | - | 3 |
| Mexico | - | - | neg | 1 | 2 |
| Turkey | - | - | - | - | 1 |
| Guatemala | - | - | neg | - | neg |
| Afganistan | - | - | - | neg | neg |
| Hungary | - | - | neg | - | neg |
| El Salvador | - | - | - | - | neg |
| Barbados | - | 7 | 38 | 177 | - |
| Ecuador | - | - | - | - | neg |
| Colombia | - | - | 6 | - | - |
| otal Unrestrained Low-Cost | 885 | 713 | 264 | 295 | 306 |

(Continued)

> BLOUSES, SHIRTS, T-SHIRTS,
> SWEATSHIRTS - CHILDREN'S AND INFANTS' (0-6X)

| IMPORTS (Continued) |  |  | CONTROL NO, 39.4 |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
| SOURCF | 1975 | 1976 | 1977 | 1978 | 1979 |
| DEVELOPED |  | --- | 0 garm | --- |  |
| U.S.A. | 660 | 883 | 665 | 465 | 493 |
| France | 8 | 8 | 23 | 42 | 70 |
| Italy | 12 | 11 | 29 | 25 | 40 |
| Finland | - | - | - | neg | 32 |
| Austria | 5 | - | 5 | - | 31 |
| Germany, West | neg | neg | neg | 1 | 8 |
| United Kingdom | 24 | 21 | 7 | 5 | 4 |
| Netherlands | 4 | 3 | neg | ] | 3 |
| Denmark | neg | neg | 1 | - | neg |
| Belgium | neg | neg | - | - | neg |
| Japan | 10 | 13 | 132 | 7 | neg |
| Switzerland | neg | neg | neg | 1 | neg |
| Sweden | 3 | 1 | 6 | 1 | - |
| Ireland | 二 | 二 | - | neg | - |
| Total Developed | 726 | 940 | 868 | 548 | 681 |
| OTHER |  |  |  |  |  |
| Portugal | - | - | - | neg | 15 |
| Spain | - | - | - | 1 | 7 |
| Israel | 6 | 9 | 9 | 3 | 2 |
| Greece | neg | $\ldots$ neg | neg | 1 | neg |
| Total Other | 6 | 9 | 9 | 5 | 24 |
| TOTAL ALL SOURCES | 4,007 | 5,747 | 5,600 | 7,532 | 5,435 |

Totals may not add due to rounding

## DEFINITION

40.1 PYJAMAS AND SLEEPWEAR (Men's, Boys', Women's, Girls')

A garment normally worn for sleeping.
40.2 BATHROBES, DRESSING GOWNS (Women's, Girls', Men's, Boys') Garments other than sleepwear normally worn in privacy, including bed jackets, and negligées.
40.3 PYJAMAS AND SLEEPWEAR, BATHROBES AND DRESSING GOWNS
(Children's and Infants 0-6x)
As above including garments described as sleepers and blanket sleepers where the legs extend to completely encase the feet.

## SECTOR PROFILE

- Based on the latest statistics available (1976) the Canadian industry producing apparel defined in Control No. 40 consists of 102 establishments.
- Based on establishments reporting production of this range of apparel to Statistics Canada, in 1976 the regional distribution was:

| 80 | Québec: | $78 \%$ |
| ---: | :--- | ---: |
| 17 | Ontario: | $17 \%$ |
| 5 | Other: | $5 \%$ |

- the major centres of production are Montréal and Toronto.
- In 1979 in unit terms the production in this apparel grouping was:

$$
\text { - Pyjamas and sleepwear other than } 0-6 x \quad 47 \%
$$

- Bathrobes and dressing gowns other than $0-6 x \quad 22 \%$
- All items ( $0-6 \mathrm{x}$ ) 31\%
- Fifteen establishments producing these types of apparel in the years 1975 to 1978 employed on the average 1,250 production workers.
- The average annual increases in domestic shipments from 1975 to 1979 for Control Nos. 40.1 to 40.3 are as follows:

Control No. Average annual increases
_ 1975 to 1979

| 40.1 | $+3.6 \%$ |
| :--- | :--- |
| 40.2 | $+2.7 \%$ |
| 40.3 | $+12.2 \%$ |

PYJAMAS \& SLEEPWEAR

## APPARENT CANADIAN MARKET

CONTROL NO, 40


| Domestic Shipments ${ }^{(1)}$ | 26,932 | 28,904 | 24,991 | 28,440 | 32,611 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Less Exports ${ }^{(1)}$ | $\underline{208}$ | $\underline{2075}$ | $\underline{217}$ | $\underline{246}$ | -276 |
| Net Domestic Shipments | 26,724 | 28,629 | 24,774 | 28,194 | 32,335 |
| Imports ${ }^{(8)}$ | $\underline{5,265}$ | $\underline{8,494}$ | $\underline{6,338}$ | $\underline{4,518}$ | $\underline{6,158}$ |
| Apparent Canadian Market | 31,989 | 37,123 | 31,112 | 32,712 | 38,493 |


| Share of Market held by | --- percent --- |  |  |  |  |
| :--- | :---: | :---: | :---: | :---: | :---: |
| Net Domestic Shipments | 84 | 77 | 80 | 86 | 84 |
| Imports | 16 | 23 | 20 | 14 | 16 |

## IMPORTS

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 | Restraint levels 1981 |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| RESTRAINED |  | --- '000 garments --- |  |  |  |  |
| China, P. R. of | 1,046 | 3,929 | 2,077 | 1,183 | 2,472 | 1,935 (5) |
| Taiwan | 2,558 | 2,269 | 2,785 | 2,295 | 2,060 | 2,865 |
| Poland | 197 | 370 | 172 | 193 | 201 | 231 |
| Hong Kong | 396 | 353 | 235 | 88 | 130 | $328(17)$ |
| Korea, R. of | 43 | 130 | 131 | 61 | 88 | $126(17)$ |
| Total Restrained | 4,240 | 7,051 | 5,400 | 3,820 | 4,951 | 5,485(4+20) |

## UNRESTRAINED LOW-COST

| Brazil | $\mathrm{n} / \mathrm{a}$ | 395 | 252 | 245 | 345 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Romania | 83 | 92 | 12 | neg | 322 |
| Pakistan | 8 | 3 | 1 | 2 | 67 |
| Philippines | 81 | 99 | 86 | 10 | 26 |
| India | 4 | 3 | 3 | 4 | 21 |
| Thailand | 4 | 6 | 13 | - | 10 |
| El Salvador | $\mathrm{n} / \mathrm{a}$ | 38 | 3 | 3 | 5 |
| Singapore | - | 1 | 31 | - | 1 |
| Colombia | - | - | - | - | 1 |
| Bolivia | - | - | - | - | neg |
| Mexico | - | - | neg | - | neg |
| Puerto Rico | - | - | - | - | neg |
| Hungary | 42 | 10 | 8 | 1 | - |
| Turkey | - | 1 | - | - | - |
| Afghanistan | - | - | $n e g$ | - | - |
| Venezuela | - | - | - | - | - |
| Haiti | - | - | - | - | - |
| Total Unrestrained |  |  |  |  |  |
| Low-Cost |  |  |  |  |  |


| IMPORTS (Contin |  |  |  | CONTROL NO, 40 |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| DEVELOPED |  | --- | OO garm | s --- |  |
| U.S.A. | 281 | 515 | 342 | 225 | 183 |
| France | 77 | 60 | 43 | 80 | 77 |
| United Kingdom | 120 | 127 | 73 | 60 | 60 |
| Italy | 17 | 33 | 33 | 35 | 52 |
| Japan | 8 | 42 | 18 | 21 | 10 |
| Finland | n/a | neg | neg | neg | 4 |
| Germany, West | 7 | 2 | 10 | neg | 3 |
| Sweden | - | - | neg | neg | 2 |
| Ireland | n/a | neg | neg | neg | 1 |
| Austria | $\mathrm{n} / \mathrm{a}$ | 3 | 1 | neg | 1 |
| Switzerland | n/a | 2 | 1 | 5 | 1 |
| Belgium | $\mathrm{n} / \mathrm{a}$ | 1 | neg | 1 | neg |
| Denmark | $\mathrm{n} / \mathrm{a}$ | neg | - | 1 | neg |
| Netherlands | - | - | 1 | neg | neg |
| Iceland | - | - | $=$ | neg | $\underline{-}$ |
| Total Developed | 510 | 785 | 522 | 428 | 394 |
| OTHER |  |  |  |  |  |
| Spain | $n / a$ | 6 | 7 | 4 | 8 |
| Portugal | - | 1 | - | neg | 5 |
| Israel | $\mathrm{n} / \mathrm{a}$ | 2 | 2 | neg | neg |
| Total Other | $\mathrm{n} / \mathrm{a}$ | 9 | 9 | 4 | 13 |
| TOTAL ALL SOURCES | 5,265 | 8,494 | 6,338 | 4,518 | 6,158 |

Totals may not add due to rounding.

## APPARENT CANADIAN MARKET

|  | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | --- '000 garments --- |  |  |  |  |
| Domestic Shipments ${ }^{(1)}$ | 13,638 | 15,083 | 12,676 | 14,203 | 15,265 |
| Less Exports ${ }^{(1)}$ | 71 | 100 | $\ldots 5$ | 76 | 55 |
| Net Domestic Shipments | 13,567 | 14,983 | 12,621 | 14,127 | 15,210 |
| Imports ${ }^{(8)}$ | 3,679 | 6,040 | 4,213 | 3,041 | 4,142 |
| Apparent Canadian Market | 17,246 | 21,023 | 16,834 | 17,168 | 19,352 |
| Share of Market held by |  |  | percent |  |  |
| Net Domestic Shipments | 79 | 71 | 75 | 82 | 79 |
| Imports | 21 | 29 | 25 | 18 | 21 |

# PYJAMAS \&,SLEEPWEAR - WOMEN'S <br> GIRLS', MEN'S, BOYS' 

## IMPORTS

CONTROL NO, 40.1


UNRESTRAINED LOW-COST

| Romania | 79 | 39 | 4 | neg | 322 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Pakistan | 3 | 1 | neg | 2 | 67 |
| India | 1 | 1 | 2 | 3 | 17 |
| Philippines | 75 | 9 | 17 | 10 | 10 |
| Thailand | - | - | 2 | - | 6 |
| Brazil | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | 18 | 2 |
| Singapore | - | neg | 9 | - | 1 |
| Colombia | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | - | 1 |
| Puerto Rico | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | - | neg |
| Hungary | 15 | - | neg | 1 | - |
| Venezuela | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | neg | - |
|  |  |  |  |  |  |
| Total Unrestrained |  |  |  |  |  |
| Low-Cost |  |  |  |  |  |
|  | 173 | 50 |  | 34 | 426 |

# PYJAMAS \&.SLEEPWEAR - WOMEN'S GIRLS', MEN'S, BOYS' 

IMPORTS (Continued) CONTROL NO. 40.1

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| DEVELOPED | --- '000 garments |  |  |  |  |
| U.S.A. | 77 | 189 | 105 | 113 | 117 |
| United Kingdom | 106 | 107 | 55 | 49 | 47 |
| France | 50 | 37 | 29 | 56 | 31 |
| Italy | 6 | 29 | 25 | 24 | 28 |
| Sweden | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | n/a | - |  |
| Germany, West | 1 | 1 | neg | neg | 1 |
| Finland | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | neg | 1 |
| Switzerland | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | 4 | 1 |
| Denmark | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | n/a | neg | neg |
| Japan | - | 3 | 6 | 2 | neg |
| Belgium | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | 1 | - |
| Total Developed | 240 | 366 | 220 | 249 | 228 |

OTHER

| Spain <br> Portugal | $\begin{aligned} & \mathrm{n} / \mathrm{a} \\ & \mathrm{n} / \mathrm{a} \\ & \hline \end{aligned}$ | $\begin{array}{r} n / a \\ n / a \\ \hline \end{array}$ | $\begin{aligned} & \mathrm{n} / \mathrm{a} \\ & \mathrm{n} / \mathrm{a} \end{aligned}$ | 4 - | 7 1 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Total Other |  |  |  | 4 | 8 |
| TOTAL ALL SOURCES | 3,679 | 6,040 | 4,213 | 3,041 | 4,142 |

BATHROBES, DRESSING, GOWNS -
WOMEN'S, GIRLS', MEN'S, BOYS'


| Domestic Shipments ${ }^{(1)}$ | 6,382 | 6,322 | 5,851 | 6,423 | 7,072 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Less Exports ${ }^{(1)}$ | 117 | 151 | 143 | $\ldots$ | 193 |
| Net Domestic Shipments | 6,265 | 6,171 | 5,708 | 6,280 | 6,879 |
| Imports ${ }^{(8)}$ | 671 | 980 | 880 | 635 | 979 |
| Apparent Canadian Market | 6,936 | 7,151 | 6,588 | 6,915 | 7,858 |


| Share of Market held by | --- percent --- |  |  |  |  |
| :--- | :---: | :---: | :---: | :---: | :---: |
| Net Domestic Shipments | 90 | 86 | 87 | 91 | 88 |
| Imports | 10 | 14 | 13 | 9 | 12 |

## IMPORTS

SOURCE

RESTRAINED
China, P. R. of
Taiwan
Poland
Hong Kong
Korea, R. of
Total Restrained

UNRESTRAINED LOW-COST
Philippines
Brazil
Thailand
El Salvador
India
Colombia
Mexico
Bolivia
Hungary
Venezuela
Total Unrestrained Low-Cost
otal Restrained Iow-Cost

1975
1976
---
451
64
80
46
11
652

| 348 |
| ---: |
| 51 |
| 69 |
| 44 |
| 6 |
| 518 |




518

| 1 |
| ---: |
| $n / a$ |
| 4 |
| $n / a$ |
| 1 |
| $n / a$ |
| $n / a$ |
| $n / a$ |
| 6 |
| $n / a$ |

12
$\mathrm{n} / \mathrm{a}$
1
$\mathrm{n} / \mathrm{a}$
6
$\mathrm{n} / \mathrm{a}$
2
$\mathrm{n} / \mathrm{a}$
$\mathrm{n} / \mathrm{a}$
$\mathrm{n} / \mathrm{a}$
10
$\mathrm{n} / \mathrm{a}$
neg
357
215
406
165
173 193
76 72 169

## 18

 53$\square$ 31 42

BATHROBES, DRESSING,GOWNS - ,
WOMEN'S, GIRLS', MEN'S, BOYS'

| IMPORTS (Continued) |  |  |  | CONT | NO. 40.2 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| DEVELOPED | --- '000 garments --- |  |  |  |  |
| U.S.A. | 80 | 104 | 95 | 68 | 31 |
| Italy | 3 | 2 | 6 | 10 | 18 |
| France | 5 | 7 | 6 | 7 | 14 |
| United Kingdom | 11 | 15 | 15 | 8 | 10 |
| Japan | 8 | 37 | 9 | 17 | 10 |
| Germany, West | 6 | 1 | 8 | neg | 1 |
| Ireland | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | n/a | neg | 1 |
| Austria | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | neg | 1 |
| Switzerland | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | 1 | neg |
| Finland | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | neg | neg |
| Netherlands | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | neg | neg |
| Denmark | $\mathrm{n} / \mathrm{a}$ | n/a | $\mathrm{n} / \mathrm{a}$ | neg | neg |
| Belgium | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | neg | neg |
| Sweden | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | - | neg |
| Iceland | n/a | $\mathrm{n} / \mathrm{a}$ | $n / \mathrm{a}$ | neg | - |
| Total Developed | 113 | 166 | 139 | 111 | 86 |
| OTHER |  |  |  |  |  |
| Spain | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | - | neg |
| Israel | n/a | n/a | n/a | neg | neg |
| TOTAL ALL SOURCES | 671 | 980 | 880 | 635 | 979 |

[^2]
## PYJAMAS, SLEEPWEAR, BATHROBES, DRESSING GOWNS - CHILDREN'S \& INFANTS' ( $0-6 \times$ )

## APPARENT CANADIAN MARKET

CONTROL 40.3

|  | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | --- '000 garments --- |  |  |  |  |
| Domestic Shipments ${ }^{(I)}$ | 6,912 | 7,499 | 6,464 | 7,814 | 10,274 |
| Less Exports ${ }^{(1)}$ | 20 | 24 | 19 | $\underline{.27}$ | 28 |
| Net Domestic Shipments | 6,892 | 7,475 | 6,445 | 7,787 | 10,246 |
| Imports ${ }^{(8)}$ | 915 | $\underline{1,474}$ | 1,245 | 842 | 1,038 |
| Apparent Canadian Market | 7,807 | 8,949 | 7,690 | 8,629 | 11,284 |
| Share of Market held by |  |  | percent |  |  |
| Net Domestic Shipments | 88 | 84 | 84 | 90 | 91 |
| Imports | 12 | 16 | 16 | 10 | 9 |

SOURCE
RESTRAINED
China, P.R. of
Taiwan
Hong Kong
Korea, R. of
Poland
Total Restrained
UNRESTRAINED LOW-COST

| Brazil | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | 215 | 337 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| India | 2 | neg | 1 | neg | 3 |
| El Salvador | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | $\mathrm{n} / \mathrm{a}$ | 3 | 3 |
| Philippines | 6 | 16 | 68 | - | 1 |
| Singapore | - | 1 | 22 | - | neg |
| Romania | 4 | 53 | 8 | - | - |
| Thailand | - | - | 5 | - | - |
| Pakistan | 6 | 2 | neg | - | - |
| Hungary | 21 | - | - | - | - |
| tal Unrestrained w-Cost | 39 | 72 | 104 | 218 | 344 |

1975
$\underline{1976} \frac{1977}{1978}$

| 58 | 258 | 220 | 274 | 355 |
| ---: | ---: | ---: | ---: | ---: |
| 266 | 206 | 408 | 237 | 201 |
| 112 | 106 | 70 | 40 | 34 |
| 4 | 76 | 3 | 6 | 11 |
| 90 | 196 | -58 | - | -11 |
| 530 | 842 | 759 | 557 | 612 |

UNRESTRAINED LOW-COST

## PYJAMAS, SLEEPWEAR, BATHROBES; DRESSING gowns - Children's \& infants ( 0 - 6 X )

## IMPORTS (Continued)

## CONTROL NO. 40.3

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| DEVELOPED |  |  | '000 | nts |  |
| U.S.A. | 123 | 222 | 142 | 43 | 35 |
| France | 22 | 16 | 9 | 16 | 32 |
| Italy | 8 | 2 | 2 | 1 | 5 |
| United Kingdom | 3 | 4 | 3 | 4 | 3 |
| Finland | n/a | n/a | n/a | neg | 2 |
| Germany, West | - | 1 | 1 | neg | neg |
| Ireland | $\mathrm{n} / \mathrm{a}$ | n/a | n/a | - | neg |
| Sweden | $\mathrm{n} / \mathrm{a}$ | n/a | n/a | neg | neg |
| Austria | $\mathrm{n} / \mathrm{a}$ | n/a | n/a | - | neg |
| Japan | - | 3 | 3 | 2 | neg |
| Switzerland | $\mathrm{n} / \mathrm{a}$ | n/a | n/a | - | neg |
| Total Developed | 156 | 248 | 160 | 66 | 7 |

OTHER

| Portugal Spain | $\begin{array}{r} \mathrm{n} / \mathrm{a} \\ \mathrm{n} / \mathrm{a} \\ \hline \end{array}$ | $\begin{aligned} & \mathrm{n} / \mathrm{a} \\ & \mathrm{n} / \mathrm{a} \\ & \hline \end{aligned}$ | $\begin{aligned} & \mathrm{n} / \mathrm{a} \\ & \mathrm{n} / \mathrm{a} \\ & \hline \end{aligned}$ | $\begin{array}{r} \text { neg } \\ \text { neg } \\ \hline \end{array}$ | $\begin{array}{r}3 \\ \mathrm{neg} \\ \hline\end{array}$ |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Total Other |  |  |  | neg | 3 |
| TOTAL ALL SOURCES | 915 | 1,474 | 1,245 | 842 | 1,038 |

Totals may not add due to rounding.

## DEFINITION

A raincoat is considered to be a garment normally worn to protect against the rain. It is normally manufactured from fabric, and includes suits, capes and ponchos. Vinyl, rubber and plastic raincoats are included as well.

## SECTOR PROFILE

- Based on the latest statistics available (1976), the Canadian raincoat industry is comprised of 48 firms.
- Regionally speaking, the industry is primarily located in Québec (58 percent), and Ontario and Manitoba (17 percent) each.
- Major centres of production, in order of importance, are Montréal, Winnipeg and Toronto.
- There is no published data available on total employment in this sector. From a survey of 21 firms in 1978, representing 41.3 percent of domestic shipments, production employees were reported as being 857.
- Due to confidentiality, Statistics Canada does not publish separate data on shipments of vinyl, rubber and plastic raincoats.
- In addition to raincoats, firms in the industry sector also produce overcoats, topcoats and jackets.


## RAINCOATS

## APPARENT CANADIAN MARKET

|  | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  |  | --- | garme | - |  |
| Domestic Shipments ${ }^{(1)}$ | 1,496 | 1,314 | 1,108 | 1,475 | 1,600 |
| Less Exports ${ }^{(1)}$ | 6 | 8 | 15 | 14 | 10 |
| Net Domestic Shipments | 1,490 | 1,306 | 1,093 | 1,461 | 1,590 |
| Imports - Vinyl/Rubber | 760 | 1,116 | 931 | 948 | 1,094 |
| - Textile | 405 | 683 | 1,054 | 698 | 729 |
| Apparent Canadian Market | 2,655 | 3,105 | 3,078 | 3,107 | 3,413 |
| Share of Market held by |  |  | ercent |  |  |
| Net Domestic Shipments | 56 | 42 | 36 | 47 | 47 |
| Imports | 44 | 58 | 64 | 53 | 53 |

## RAINCOATS

## IMPORTS

| Restraint <br> levels <br> 1981 |  |  |  |  |  |  |
| :--- | ---: | ---: | ---: | ---: | ---: | ---: |
| SOURCE | $\underline{1975}$ | $\underline{1976}$ | $\underline{1977}$ | $\underline{1978}$ | $\underline{1979}$ | $\underline{1000}$ |
| RESTRAINED |  |  |  |  |  |  |

UNRESTRAINED LOW-COST

| China, P.R. of | - | - | neg | $-\overline{4}$ | 353 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Korea, R. of | 75 | 85 | 87 | 84 | 329 |
| Hong Kong | 170 | 215 | 170 | 80 | 204 |
| Romania | neg | - | 22 | 25 | 25 |
| Poland | 41 | 61 | 32 | 19 | 24 |
| Singapore | - | - | 1 | - | - |
| Malaysia | - | - | 1 | - | - |
| Costa Rica | 7 | - | - | - | - |
| Hungary | - | - | - | neg | - |
| Philippines | - | - | - | neg | - |
| Total Unrestrained |  |  |  |  |  |
| Low-Cost | 293 | 361 | 313 | 208 | 935 |

## RAINCOATS

IMPORTS (Continued)

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| DEVELOPED |  |  | --- '000 garments --- |  |  |
| Japan | 105 | 102 | 75 | 84 | 57 |
| U.S.A. | 33 | 16 | 21 | 28 | 50 |
| France | 7 | 13 | 15 | 10 | 25 |
| Italy | 4 | 4 | 2 | 5 | 6 |
| United Kingdom | 14 | 22 | 13 | 11 | 5 |
| Norway | 9 | 5 | 15 | 6 | 3 |
| Finland | 2 | 2 | 2 | 1 | 2 |
| Sweden | - | - | 2 | neg | 2 |
| Germany, West | neg | 1 | 5 | 3 | 1 |
| New Zealand | - | - | - | - | 1 |
| Belgium | 1 | 1 | neg | 1 | neg |
| Switzerland | 1 | 1 | 2 | 1 | neg |
| Netherlands | 2 | 3 | 3 | neg | neg |
| Denmark | 1 | neg | neg | neg | - |
| Austria | - | - | neg | neg | - |
| Ireland | - | - | neg | - | - |
| Iceland | neg | - | - | - | - |
| South Africa | neg | - | - | $=$ | - |
| Total Developed | 179 | 177 | 255 | 150 | 152 |

## OTHER

| Israel | 2 | 1 | 2 | neg | neg |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Spain | neg | neg | neg | 1 | - |
|  | - | - | -1 | - | - |
| Yotal Other | 2 | 1 | 3 | 1 | neg |
|  |  |  |  |  |  |
| TOTAL ALL SOURCES | 1,166 | 1,799 | 1,985 | 1,645 | 1,823 |

Totals may not add due to rounding.

## RAINCOATS - VINYL

OR RUBBER

## IMPORTS

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| RESTRAINED |  | --- '000 garments --- |  |  |  |
| Taiwan | 449 | 728 | 628 | 714 | 415 |

UNRESTRAINED LOW-COST

| Korea, R. of | 75 | 85 | 87 | 84 | 329 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Hong Kong | 170 | 215 | 170 | 80 | 204 |
| China, P.R. of | - | - | - | - | 70 |
| Total Unrestrained |  |  |  |  |  |
| Low-Cost | 245 | 300 | 257 | 164 | 603 |

DEVELOPED

| Japan | 24 | 55 | 16 | 45 | 42 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| U.S.A. | 28 | 12 | 14 | 21 | 32 |
| France | 1 | 7 | 8 | 1 | 1 |
| New Zealand | - | - | - | - | 1 |
| United Kingdom | 10 | 11 | 4 | 2 | neg |
| Italy | 2 | 3 | neg | neg | neg |
| Norway | - | - | 2 | - | - |
| Netherlands | - | - | neg | - | - |
| Belgium | - | neg | neg | - | - |
| Switzerland | - | - | neg | - | - |
| Denmark | - | neg | neg | - | - |
| Iceland | neg | - | 二 | - | 二 |
| Total Developed | 65 | 88 | 44 | 69 | 76 |
| OTHER | - | - | - | - | - |
| TOTAL ALL SOURCES | 760 | 1,116 | 931 | 948 | 1,094 |

Totals may not add due to rounding.


IMPORTS (Continued)
CONTROL NO, 41.2

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| DEVELOPED | --- '000 garments --- |  |  |  |  |
| France | 6 | 6 | 7 | 9 | 24 |
| U.S.A. | 5 | 4 | 7 | 8 | 18 |
| Japan | 80 | 54 | 58 | 39 | 16 |
| Italy | 2 | 2 | 2 | 5 | 5 |
| United Kingdom | 3 | 11 | 10 | 9 | 4 |
| Norway | 9 | 5 | 13 | 6 | 3 |
| Finland | 2 | 2 | 2 | 1 | 2 |
| Sweden | - | - | 2 | neg | 2 |
| Germany, West | neg | 1 | 5 | 3 | 1 |
| Belgium | 1 | 1 | neg | 1 | neg |
| Switzerland | 1 | 1 | 2 | 1 | neg |
| Netherlands | 2 | 3 | 3 | neg | neg |
| Denmark | 1 | neg | neg | neg | - |
| Austria | - | - | neg | neg | - |
| South Africa | neg | - | - | - | - |
| Ireland | 二 | - | neg | 二 | - |
| Total Developed | 112 | 90 | 111 | 82 | 75 |

OTHER

| Israel | 2 | 1 | 2 | neg | neg |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Spain | neg | neg | neg | 1 | - |
| Yugoslavia | - | $\underline{-}$ | $\underline{1}$ | - | - |
| Total Other | 2 | 1 | 3 | 1 | neg |
| total ali sources | 405 | 683 | 1,054 | 698 | 729 |

Totals may not add due to rounding.

## DEFINITION

42.1 DRESSES (Women's, Girls')

A one-piece garment extending above the waist, including jumpers, evening gowns, dusters, housecoats and caftans (other than sleepwear).
42.2 SKIRTS (Women's, Girls')

One-piece garment not extending above the waist, including golf skirts and kilts.
42.3 SUITS, COORDINATES (Women's, Girls') AND OUTERWEAR SETS (Women's, Girls', Men's, Boys')
A garment comprising of two or more matched or coordinated pieces covering both the upper and lower parts of the body, packed and shipped as a set.
Note: Outerwear sets include: coat and dress sets, blouse and pant or skirt sets, shirt and pant or skirt sets, cabana sets, beach pyjamas, lounging pyjamas, short sets, and beachwear (other than described in

Control Item No. 44).
It excludes:
(1) garments described in Control Item Nos. 32, 38, 40 41, 44 and 47;
(2) athletic clothing (see below);
(3) dresses or skirts with coordinated or matched accessories, e.g. scarves, hats, etc., which by themselves are not subject to Control Items Nos. 32 or 37-50.
42.4 ATHLETIC SETS OR SUITS (Women's, Girls', Men's, Boys')

A garment normally consisting of two or more matched or coordinated pieces covering both the lower and upper parts of the body, packed and shipped as a set, normally worn for participation in athletic activities and not covered by any other definition. It includes leotards covering the trunk of the body, judo sets, track suits, jogging suits, cross-. country ski suits (subject to the description in Control Item No. 32).
42.5 DRESSES, SKIRTS, SUITS,CO-ORDINATES, SHORT SETS, ETC.
(Children's and Infants' 0-6x)
Children's and infants' garment (0-6x)including sunsuits, christening sets, pram sets, creepers, rompers, crawlers and diaper sets and any other such garments as described not provided for in other control numbers.

## SECTOR PROFILE

- Based on the latest statistics available (1976) the Canadian industry producing apparel defined in Control No. 42 consists of 330 establishments.
- Based on establishments reporting production of this range of apparel to Statistics Canada, in 1975 and 1976 the regional distribution was:

246 Québec: 75\%
57 Ontario: 17\%
27 Other: 8\%

- By far the majority of producers are located in Montréal.
- In 1979 in unit terms the production in this apparel grouping was:
- dresses other than 0-6x 35\%
- skirts other than $0-6 \mathrm{x} \quad 18 \%$
- suits and coordinates other than (0-6x) 16\%
- athletic suits or sets other than (0-6x) 13\%
- above apparel (0-6x) $18 \%$
- A survey of 53 establishments reporting production of these types of apparel in the years 1975 to 1978 inclusive revealed an average number of 4,311 production employees in the sector.
- a survey for 1978 which included the following establishment producing each of the five categories of apparel within this grouping showed their production as a percentage of total output in their respective sector as follows:

| Sector | Number of <br> establishments | Percent <br> of Production |
| :--- | :---: | :---: |
| 42.1 | 46 | 40 |
| 42.2 | 29 | 32 |
| 42.3 | 34 | 60 |
| 42.4 | 10 | 20 |
| 42.5 | 26 | 60 |

- The 13 percent decrease in domestic shipments of dresses (Control No. 42.1) in 1979 over 1978 is consistent with the increase in shipments of skirts (Control No. 42.2), suits and coordinates (Control No. 42.3) and blouses (Control No. 39.1). The decrease in domestic shipments of dresses in 1979 followed an extremely high shipment year in 1978, indicating a possible overstocking of dresses in 1979.

```
DRESSES, SKIRTS, SUITS \& CO-ORDINATES ATHLETIC SUITS OR SETS, SHORT SETS
```

APPARENT CANADIAN MARKET<br>CONTROL NO, 42

|  | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | --- '000 garments --- |  |  |  |  |
| Domestic Shipments ${ }^{(1)}$ | 35,550 | 32,489 | 31,573 | 37,187 | 35,511 |
| Less Exports ${ }^{(1)}$ | 420 | 404 | 371 | 369 | 390 |
| Net Domestic Shipments <br> (8) | 35,130 | 32,085 | 31,202 | 36,818 | 35,121 |
| Imports | 14,459 | 23,391 | 15,697 | 12,629 | 14,641 |
| Apparent Canadian Market | 49,589 | 55,476 | 46,899 | 49,447 | 49,762 |
| Share of Market held by |  |  | percent |  |  |
| Net Domestic Shipments | 71 | 58 | 67 | 74 | 71 |
| Imports | 29 | 42 | 33 | 26 | 29 |

DRESSES, SKIRTS, SUITS \& CO-ORDINATES ATHLETIC SUITS OR SETS, SHORT SETS

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 | $\begin{gathered} \text { Restraint } \\ \text { levels } \\ 1981 \end{gathered}$ |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| RESTRAINED |  |  | - '000 | rments |  |  |
| Taiwan | 5,029 | 7,792 | 4,896 | 3,450 | 2,935 | 4,964 |
| Hong Kong | 2,013 | 3,644 | 2,963 | 1,863 | 1,743 | 1,798 |
| Philippines | 939 | 1,313 | 925 | 946 | 1,581 | 309 |
| Korea, R. of | 1,260 | 2,718 | 2,115 | 1,771 | 1,065 | 606 |
| India | 680 | 604 | 283 | 492 | 698 | 822 |
| Thailand | 4(10) | 10 | 6 | 3 | 510 | 713 |
| Singapore | 12 | 32 | 31 | 43 | 105 | 449 (3) |
| Total Restrained | 9,937 | 16,113 | 11,219 | 8,568 | 8,637 | 9,661(4+20) |

DRESSES, SKIRTS, SUITS \& CO-ORDINATES
ATHLETIC SUITS OR SETS, SHORT SETS

| $\frac{\text { IMPORTS }}{\text { SOURCE }}$ (Continued) |  |  |  | CONTROL NO, 42 |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | 1975 | 1976 | 1977 | $\underline{1978}$ | 1979 |
| UNRESTRAINED --- '000 garments |  |  |  |  |  |
| China, P. R. of | 236 | 1,513 | 179 | 86 | 1,162 |
| Poland | 21 | 51 | 67 | 98 | 482 |
| Brazil | $\mathrm{n} / \mathrm{a}$ | 171 | 7 | 9 | 177 |
| Barbados | $\mathrm{n} / \mathrm{a}$ | 89 | 99 | 110 | 163 |
| Romania | 84 | 40 | 62 | 3 | 133 |
| Macao | - | 8 | 2 | neg | 40 |
| Leew-Wind | n/a | - | - | - | 33 |
| Hungary | - | 2 | 5 | neg | 32 |
| Thailand | n/a(10) | - | - | neg | 31 |
| Sri Lanka | , | - | 1 | 8 | 23 |
| E1 Salvador | n/a | - | neg | neg | 21 |
| Pakistan | 38 | 46 | 25 | 12 | 20 |
| Haiti | n/a | - | - | - | 11 |
| Malta | $\mathrm{n} / \mathrm{a}$ | 10 | neg | 5 | 8 |
| Afghanistan | n/a | 18 | 20 | 8 | 5 |
| Mexico | $\mathrm{n} / \mathrm{a}$ | 78 | 4 | 3 | 5 |
| Morocco | n/a | 21 | 6 | 8 | 4 |
| Indonesia | n/a | - | - | neg | 4 |
| Uruguay | $\mathrm{n} / \mathrm{a}$ | 5 | 1 | - | 3 |
| Turkey | n/a | 8 | 1 | - | 2 |
| Malaysia | - | - | 3 | 2 | 2 |
| Bolivia | $\mathrm{n} / \mathrm{a}$ | 16 | 7 | 3 | 2 |
| Peru | n/a | - | neg | neg | 2 |
| Korea, North | n/a | - | - | - | 1 |
| Colombia | n/a | 22 | 3 | neg | 1 |
| Ecuador | $\mathrm{n} / \mathrm{a}$ | 5 | 6 | 3 | 1 |
| Bulgaria | - | - | - | - | neg |
| Cyprus | n/a | - | 1 | 1 | neg |
| Iran | $\mathrm{n} / \mathrm{a}$ | - | - | - | neg |
| Egypt | $\mathrm{n} / \mathrm{a}$ | - | - | 1 | neg |
| Chile | n/a | - | - | - | neg |
| Jamaica | n/a | - | neg | neg | neg |
| Guatemala | $\mathrm{n} / \mathrm{a}$ | 6 | 1 | 1 | neg |
| Czechoslovakia | n/a | 4 | 3 | - | - |
| Togo | - | - | - | 11 | - |
| Guyana | $\mathrm{n} / \mathrm{a}$ | - | neg | - | - |
| Argentina | $\mathrm{n} / \mathrm{a}$ | 7 | 1 | neg | - |
| Other | $\mathrm{n} / \mathrm{a}$ | - | - | neg | neg |
| Total Unrestrained |  |  |  |  | 2,368 |

## DRESSES, SKIRTS, SUITS \& CO-ORDINATES ATHLETIC SUITS OR SETS, SHORT SETS

| IMPORTS (Continued) |  |  |  | CONTR | NO. 4 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| DEVELOPED | --- '000 garments --- |  |  |  |  |
| U.S.A. | 1,611 | 1,622 | 1,502 | 1,489 | 1,750 |
| France | 410 | 786 | 432 | 588 | 476 |
| Italy | 400 | 483 | 383 | 463 | 371 |
| Japan | 1,126 | 877 | 803 | 451 | 318 |
| United Kingdom | 350 | 418 | 253 | 256 | 212 |
| Germany, West | 100 | 181 | 137 | 111 | 114 |
| Finland | $\mathrm{n} / \mathrm{a}$ | 29 | 21 | 29 | 46 |
| Austria | $\mathrm{n} / \mathrm{a}$ | 78 | 27 | 11 | 32 |
| Sweden | $\mathrm{n} / \mathrm{a}$ | 34 | 35 | 31 | 27 |
| Iceland | $\mathrm{n} / \mathrm{a}$ | 5 | 8 | 8 | 18 |
| Norway | $\mathrm{n} / \mathrm{a}$ | 17 | 35 | 19 | 18 |
| Ireland | $\mathrm{n} / \mathrm{a}$ | 10 | 7 | 16 | 17 |
| Netherlands | $\mathrm{n} / \mathrm{a}$ | 32 | 17 | 12 | 12 |
| Switzerland | $\mathrm{n} / \mathrm{a}$ | 25 | 1. | 20 | 1 |
| New Zealand | $\mathrm{n} / \mathrm{a}$ | - | 1 | 1 | 6 |
| Denmark | $\mathrm{n} / \mathrm{a}$ | 8 | 10 | 9 | 4 |
| South Africa | $\mathrm{n} / \mathrm{a}$ | 1 | 3 | 2 | 4 |
| Belgium | $\mathrm{n} / \mathrm{a}$ | 7 | 6 | 2 | 2 |
| Australia | n/a | 1 | 3 | neg | 2 |
| Total Developed | 3,997 | 4,614 | 3,715 | 3,518 | 3,440 |

OTHER

| Spain | $\mathrm{n} / \mathrm{a}$ | 82 | 39 | 50 | 68 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Israel | $\mathrm{n} / \mathrm{a}$ | 376 | 154 | 71 | 68 |
| Portugal | $\mathrm{n} / \mathrm{a}$ | 32 | 9 | 17 | 36 |
| Greece | $\mathrm{n} / \mathrm{a}$ | 44 | 34 | 26 | 25 |
| Yugoslavia | $\mathrm{n} / \mathrm{a}$ | 11 | -23 | 8 | neg |
| Total Other | $\mathrm{n} / \mathrm{a}$ | 545 | 259 | 172 | 197 |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
| TOTAL ALL SOURCES | 14,459 | 23,391 | 15,697 | 12,629 | 14,641 |

Totals may not add due to rounding.


## IMPORTS

| SOURCE | 1975* | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| RESTRAINED |  | --- '000 garments --- |  |  |  |
| Hong Kong |  | 999 | 906 | 788 | 586 |
| India |  | 315 | 173 | 258 | 346 |
| Taiwan |  | 391 | 283 | 319 | 240 |
| Korea, R. of |  | 28 | 25 | 70 | 63 |
| Singapore |  |  | 5 | 27 | 29 |
| Thailand |  | 2 | 2 | 1 | 14 |
| Philippines |  | 34 | 65 | 3 | 10 |
| Tc.tal Restrained | - | 1,769 | 1,459 | 1,466 | 1,288 |

UNRESTRAINED LOW-COST

| Poland | - | - | 9 | 28 |
| :---: | :---: | :---: | :---: | :---: |
| El Salvador | - | neg | - | 20 |
| Sri Lanka | - | 1 | 6 | 18 |
| Afganistan | 14 | 19 | 7 | 5 |
| Malta | 3 | neg | 2 | 4 |
| Morocco | 5 | 3 | 3 | 4 |
| China, P.R. of | 112 | 23 | 3 | 3 |
| Indonesia | - | - | - | 3 |
| Barbados | 35 | 31 | neg | 2 |
| Malaysia | - | 1 | 1 | 1 |
| Pakistan | 19 | 4 | 4 | 1 |
| Korea, N. | - | - | - | 1 |
| Mexico | 7 | 2 | 2 | 1 |
| Hungary | - | neg | - | neg |
| Cyprus | 6 | - | neg | neg |
| Turkey | 6 | neg | - | neg |
| Egypt | - | - | 1 | neg |
| Brazil | 24 | neg | 9 | neg |
| Ecuador | - | - | neg | neg |
| Jamaica | - | neg | neg | neg |
| Guatemala | 1 | neg | 1 | neg |
| Romania | - | - | neg | - |
| Guyana | - | neg | - | - |
| Argentina | - | neg | - |  |
| Colombia | - | neg | - | - |
| Leew-Wind | n/a | neg | - | - |
| Other | n/a | neg | neg | neg |

Total Unrestrained
Low-Cost

28
20
18
4
33111
neg
neg
neg
neg
neg
neg
neg
neg
-
-
-
neg

91

| SOURCE | 1975* | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| DEVELOPFD |  | --- '000 garments --- |  |  |  |
| U.S.A. |  | 474 | 431 | 375 | 545 |
| France |  | 166 | 104 | 186 | 115 |
| Italy |  | 147 | 88 | 107 | 67 |
| United Kingdom |  | 140 | 93 | 105 | 64 |
| Japan |  | 82 | 67 | 44 | 48 |
| Germany, West |  | 16 | 11 | 34 | 27 |
| Finland |  | 17 | 14 | 15 | 19 |
| Ireland |  | 3 | 2 | 5 | 6 |
| Netherlands |  | 1 | 1 | neg | 4 |
| Sweden |  | 6 | 7 | 5 | 3 |
| Switzerland |  | 7 | 6 | 5 | 3 |
| Denmark |  | 2 | 4 | 5 | 2 |
| Australia |  | 1 | neg | - | 1 |
| South Africa |  | neg | 1 | neg | 1 |
| Austria |  | 3 | 2 | 2 | 1 |
| Belgium |  | 2 | 1 | 1 | neg |
| Iceland |  | - | - | neg | - |
| Total Developed | - | 1,067 | 832 | 889 | 906 |

OTHER

| Israel |  | 36 | 18 | 15 | 9 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Greece |  | 6 | 4 | 5 | 4 |
| Spain |  | 3 | 2 | neg | 2 |
| Portugal |  | 6 | neg | 2 | neg |
| Yugoslavia |  | - | neg | - | neg |
| Total Other | - | 51 | 24 | 22 | 15 |
| *Not available. |  |  |  |  |  |
| TOTALL ALL SOURCES | - | 3,116 | 2,403 | 2,426 | 2,303 |

Totals may not add due to rounding.

|  | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  |  |  | garme | --- |  |
| Domestic Shipments ${ }^{(1)}$ | 5,131 | 5,097 | 4,871 | 5,400 | 6,334 |
| Less Exports ${ }^{(1)}$ | 63 | 43 | 30 | 51 | 65 |
| Net Domestic Shipments | 5,068 | 5,054 | 4,841 | 5,349 | 6,269 |
| Imports | 791 | 1,298 | 730 | 1,081 | 1,214 |
| Apparent Canadian Market | 5,859 | 6,352 | 5,571 | 6,430 | 7,483 |
| Share of Market held by |  |  | ercent |  |  |
| Net Domestic Shipments | 86 | 80 | 87 | 83 | 84 |
| Imports | 14 | 20 | 13 | 17 | 16 |

## IMPORTS

SOURCE
RESTRAINED
Hong Kong
India
Taiwan
Korea, R. of
Philippines
Thailand
Singapore
Total Restrained

UNRESTRAINED LOW-COST

| China, P.R. of | - | 4 | - | 38 |
| :---: | :---: | :---: | :---: | :---: |
| Leew-Wind | - | - | - | 33 |
| Macao | 8 | 2 | neg | 31 |
| Pakistan | 6 | 1 | 3 | 17 |
| Hungary | - | - | neg | 6 |
| Poland | - | neg | 4 | 6 |
| Sri Lanka | - | - | 1 | 5 |
| El Salvador | - | - | - | 1 |
| Mexico | neg | neg | neg | 1 |
| Morocco | - | 1 | neg | neg |
| Malaysia | - | 1 | - | neg |
| Indonesia | - | - | - | neg |
| Colombia | - | - | - | neg |
| Ecuador | - | - | - | neg |
| Guatemala | 1 | neg | neg | neg |
| Afganistan | - |  | I | neg |
| Turkey | - | 1 | - | - |
| Cyprus | - | neg | 1 | - |
| Bolivia | - | - | neg | - |
| Brazil | 1 | 2 | - | - |
| Uruguay | - | 1 | - |  |
| tal Unrestrained |  |  |  |  |
| w-Cost | 16 | 14 | 10 | 138 |

1975* 1976
_-. '000 garments -.-

| 324 | 203 | 237 | 266 |
| ---: | ---: | ---: | ---: |
| 142 | 77 | 160 | 259 |
| 321 | 79 | 118 | 33 |
| 163 | 60 | 74 | 29 |
| 1 | 1 | neg | 9 |
| 2 | 2 | 2 | 5 |
| - | 1 | 4 | -2 |
| 953 | 423 | 595 | 603 |

# SKIRTS - WOMEN'S, GIRLS' 

IMPORTS (Continued) CONTROL NO. 42.2

| SOURCE | 1975* | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| DEVELOPED |  | --- 1000 garments --- |  |  |  |
| U.S.A. |  | 78 | 67 | 118 | 165 |
| France |  | 93 | 103 | 181 | 114 |
| Italy |  | 38 | 32 | 58 | 75 |
| United Kingdom |  | 46 | 40 | 60 | 51 |
| Germany, West |  | 5 | 22 | 24 | 34 |
| Finland |  | 2 | 2 | 3 | 7 |
| Sweden |  | 7 | 5 | 11 | 7 |
| Ireland |  | 3 | 2 | 4 | 4 |
| Austria |  | neg | 2 | 1 | 4 |
| South Africa |  | neg | 1 | neg | 2 |
| Japan |  | 15 | 8 | 3 | 2 |
| Belgium |  | neg | neg | neg | 1 |
| Denmark |  | neg | 1 | 1 | 1 |
| Switzerland |  | 2 | 1 | 3 | 1 |
| Australia |  | - | - | - | 1 |
| Netherlands |  | - | - | 1 | 1 |
| Iceland |  | 二 | - | - | neg |
| Total Developed | - | 289 | 286 | 468 | 470 |

OTHER

| Israel |  | 35 | 6 | 3 | 2 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Greece |  | 2 | 1 | 4 | 1 |
| Portugal |  | - | neg | neg | neg |
| Spain |  | neg | 1 | 1 | neg |
| Total Other | - | 37 | 8 | 8 | 3 |
| TOTAL AL工 SOURCES | - | 1,298 | 730 | 1,081 | 1,214 |

*Not available.
Totals may not add due to rounding.

## SUITS \& CO-ORDINATES

## APPARENT CANADIAN MARKET

|  | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | --- '000 garments --- |  |  |  |  |
| Domestic Shipments ${ }^{(1)}$ | 3,997 | 4,390 | 4,004 | 5,057 | 5,546 |
| Less Exports ${ }^{(1)}$ | 56 | 59 | 68 | 58 | 63 |
| Net Domestic Shipments | 3,941 | 4,331 | 3,936 | 4,999 | 5,483 |
| Imports ${ }^{(8)}$ | 5,280 | 10,624 | 6,579 | 3,453 | 3,569 |
| Apparent Canadian Market | 9,221 | 14,955 | 10,515 | 8,452 | 9,052 |
| Share of Market held by |  |  | percent |  |  |
| Net Domestic Shipments | 43 | 29 | 37 | 59 | 61 |
| Imports | 57 | 71 | 63 | 41 | 39 |

## SUITS \& CO-ORDINATES

## IMPORTS

| SOURCE | 1975* | 1976 | 1977 | 1978 | $\underline{1979}$ |
| :---: | :---: | :---: | :---: | :---: | :---: |
| RESTRAINED |  | --- '000 garments --- |  |  |  |
| Taiwan |  | 3,392 | 2,367 | 1,107 | 875 |
| Korea, R. of |  | 1,699 | 1,413 | 800 | 449 |
| Hong Kong |  | 1,617 | 1,109 | 581 | 412 |
| Thailand |  | 6 | 2 | - | 130 |
| India |  | 141 | 33 | 66 | 71 |
| Philippines |  | 193 | 101 | 5 | 41 |
| Singapore |  | 19 | 16 | 2 | 33 |
| Total Restrained | - | 7,067 | 5,041 | 2,561 | 2,011 |

## SUITS \& CO-ORDINATES

| IMPORTS (Continued) |  |  |  | CONTROL NO, 42.3 |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| SOURCE | 1975* | 1976 | 1977 | 1978 | 1979 |  |
| UNTESTRAINED LOW-COST | -.-- '000 garments --- |  |  |  |  |  |
| China, P. R. of |  | 1,207 | 70 | 45 | 394 |  |
| Poland |  | 51 | 67 | 30 | 295 |  |
| Romania |  | 40 | 62 | 3 | 97 |  |
| Hungary |  | 2 | 4 | neg | 25 |  |
| Brazil |  | 132 | - | neg | 8 |  |
| Macao |  | - | - | - | 7 |  |
| Malta |  | 7 | neg | 3 | 4 |  |
| Uruguay |  | 5 | neg | - | 3 |  |
| Bolivia |  | 16 | 7 | 3 | 2 |  |
| Peru |  | - | neg | neg | 2 |  |
| Morocco |  | 16 | 1 | 4 | 1 |  |
| Malaysia |  | - | 1 | 1 | 1 |  |
| Pakistan |  | 21 | 20 | 2 | 1 |  |
| Indonesia |  | - | - | neg | 1 |  |
| Ecuador |  | 5 | 6 | 3 | 1 |  |
| Barbados |  | 17 | 47 | - | 1 |  |
| Mexico |  | 70 | 2 | neg | 1 |  |
| Bulgaria |  | - | - | - | neg |  |
| Cyprus |  | - | neg | neg | neg |  |
| Iran |  | - |  |  | neg |  |
| Turkey |  | 1 | - | - | neg |  |
| Chile |  | - | - | - | neg |  |
| Colombia |  | 22 | 3 | neg | neg |  |
| Czechoslovakia |  | 4 | 3 | - | - |  |
| Togo |  | - | - | 11 | - |  |
| Sri Lanka |  | - | - | 1 | - |  |
| Afghanistan |  | 4 | 1 | - | - |  |
| Argentina |  | 7 | 1 | neg | - |  |
| Jamaica |  | - | neg | neg | - |  |
| El Salvador |  | - | neg | neg | - |  |
| Guatemala |  | 4 | - | - | - |  |
| Other |  | 二 | - | - | $\underline{=}$ |  |
| Total Unrestrained |  |  |  |  |  |  |
| Low-Cost | - | 1,631 | 296 | 106 | 844 |  |

## SUITS \& CO-ORDINATES

IMPORTS (Continued)
CONTROL NO. 42.3

SOURCE
DEVELOPED
U.S.A.
Italy

France
United Kingdom
Japan
Germany, West
Iceland
Sweden
Austria
Norway
Finland
Ireland
Switzerland
Netherlands
Belgium
South Africa
Australia
Denmark
New Zealand
Total Developed
OTHER
Israel
Portugal
Greece
Spain
Yugoslavia
Total Other

TOTAL ALL SOURCES

NOTAL ALL SOURCES

1975* 1976 1977 1979 -... 1000 garments -.

| 516 | 377 | 223 | 200 |
| ---: | ---: | ---: | ---: |
| 185 | 103 | 179 | 129 |
| 441 | 194 | 144 | 120 |
| 173 | 103 | 50 | 70 |
| 149 | 204 | 69 | 60 |
| 109 | 72 | 26 | 40 |
| 5 | 8 | 8 | 17 |
| 20 | 23 | 15 | 17 |
| 52 | 20 | 5 | 13 |
| 17 | 35 | 15 | 13 |
| 11 | 4 | 6 | 8 |
| 4 | 2 | 6 | 6 |
| 16 | 14 | 10 | 4 |
| 5 | 3 | 3 | 3 |
| 2 | 2 | 1 | 1 |
| 1 | 1 | 2 | 1 |
| neg | 2 | neg | 1 |
| 5 | 4 | 2 | neg |
| - | 1 | - | neg |
|  |  |  |  |
| 1,711 | 1,172 | 764 | 703 |

Not available.
Totals may not add due to rounding.

|  | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | '000 garments --- |  |  |  |  |
| Domestic Shipments ${ }^{(I)}$ | 4,336 | 4,543 | 4,574 | 5,088 | 4,720 |
| Less Exports ${ }^{(1)}$ | nil | nil | nil | nil | nil |
| Net Domestic Shipments | 4,336 | 4,543 | 4,574 | 5,088 | 4,720 |
| Imports (8) | 880 | 465 | 453 | 1,401 | 2,201 |
| Apparent Canadian Market | 5,216 | 5,008 | 5,027 | 6,489 | 6,921 |
| Share of Market held by |  |  | rcent |  |  |
| Net Domestic Shipments | 83 | 91 | 91 | 78 | 68 |
| Imports | 17 | 9 | 9 | 22 | 32 |


| SOURCE | 1975* | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| RESTRAINED |  | -- | '000 garments |  |  |
| Taiwan |  | 145 | 168 | 226 | 394 |
| Thailand |  | - | - | - | 361 |
| Korea, R. of |  | 16 | 2 | 473 | 253 |
| Hong Kong |  | 59 | neg | 50 | 34 |
| Singapore |  | - | - | - | 16 |
| Philippines |  | - | - | - | 2 |
| India |  | 5 | - | neg | neg |
| Total Restrained | - | 225 | 170 | 749 | 1,060 |

UNRESTRAINED LOW-COST

| China, P. R. of |  | - | 4 | 2 | 244 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Poland |  | - | - | 55 | 152 |
| Barbados |  | - |  | 75 | 111 |
| Romania |  |  | - | - | 36 |
| Hungary |  | - | - | - | 1 |
| Peru |  |  | - | - | neg |
| Pakistan |  | - | - | 2 | - |
| Ecuador |  | - | neg | - | - |
| otal Unrestrained ow-Cost | - | - | 4 | 134 | 544 |


| SOURCE | 1975* | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| DEVELOPED |  | ---- '000 garments --- |  |  |  |
| U.S.A. |  | 169 | 231 | 432 | 539 |
| Japan |  | - | 8 | 43 | 15 |
| France |  | 38 | 8 | 1 | 12 |
| Austria |  | - | - | 2 | 11 |
| Norway |  | - | - | 3 | 5 |
| New Zealand |  | - | - | 1 | 5 |
| United Kingdom |  | 28 | 5 | 8 | 3 |
| Italy |  | 5 | 25 | 8 | 2 |
| Finland |  | - | - | neg | 1 |
| Germany, West |  | - | neg | 12 | 1 |
| Switzerland |  | - | 1 | neg | 1 |
| Belgium |  | - | - | - | neg |
| Denmark |  | - | - | neg | neg |
| Sweden |  | - | - | neg | neg |
| Total Developed | - | 240 | 278 | 510 | 595 |

OTHER

| Yugoslavia |  | - | - | 6 | neg |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Total Other | - | - | - | 6 | neg |
| TOTAL ALI SOURCES | - | 465 | 453 | 1,401 | 2,201 |

*Not available.
Totals may not add due to rounding.

CONTROL NO. 42.5

|  | 1975 | 1976 | 1977 | $\underline{1978}$ | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | --- '000 garments --- |  |  |  |  |
| Domestic Shipments ${ }^{(1)}$ | 8,551 | 6,502 | 6,412 | 7,413 | 6,503 |
| Less Exports ${ }^{(1)}$ | 253 | 252 | 186 | 186 | 205 |
| Net Domestic Shipments | 8,298 | 6,250 | 6,226 | 7,227 | 6,298 |
| Imports ${ }^{\text {(8) }}$ | 5,171 | 7,889 | 5,533 | 4,269 | 5,354 |
| Apparent Canadian Market | 13,469 | 14,139 | 11,759 | 11,496 | 11,652 |
| Share of Canadian Market |  |  | percent |  |  |
| Net Domestic Shipments | 62 | 44 | 53 | 63 | 54 |
| Imports | 38 | 56 | 47 | 37 | 46 |

IMPORTS

SOURCE
ESTRAINED
Philippines
Taiwan
Hong Kong
Korea, R. of
Singapore
India
Total Restrained

UNRESTRAINED LOW-COST


| IMPORTS (Continued) |  |  | CONTROL NO, 42.5 |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
| SOURCE | 1975* | 1976 | 1977 | 1978 | 1979 |
| DEVELOPED |  | --- '000 garments --- |  |  |  |
| U.S.A. |  | 384 | 400 | 342 | 299 |
| Japan |  | 631 | 517 | 292 | 194 |
| France |  | 48 | 23 | 75 | 113 |
| Italy |  | 108 | 134 | 111 | 97 |
| United Kingdom |  | 31 | 12 | 33 | 24 |
| Finland |  | - | neg | 4 | 12 |
| Germany, West |  | 51 | 32 | 14 | 12 |
| Netherlands |  | 26 | 13 | 8 | 4 |
| Austria |  | 22 | 3 | 1 | 2 |
| Switzerland |  | 1 | 6 | 2 | 2 |
| Ireland |  | - | neg | 1 | 1 |
| Belgium |  | 2 | 2 | - | neg |
| Denmark |  | - | 1 | 1 | neg |
| Norway |  | - | - | - | neg |
| Sweden |  | - | neg | neg | neg |
| South Africa |  | - | - | - | neg |
| Australia |  | - | - | - | neg |
| New Zealand |  | $=$ | 二 | 二 | neg |
| Total Developed | - | 1,304 | 1,143 | 884 | 760 |

OTHER

| Spain |  | 63 | 30 | 46 |
| :--- | ---: | ---: | ---: | ---: |
| Israel | 125 | 88 | 40 | 51 |
| Portugal |  | 20 | 7 | 14 |
| Greece | 25 | 24 | 17 | 19 |
| Yugoslavia | 10 | 8 | - | - |
| Total Other |  | 243 | 157 | 117 |
|  |  |  |  |  |
|  |  |  |  |  |
| TOTAL ALL SOURCES | - | 7,889 | 5,533 | 4,269 |

*Not available.
Totals may not add due to rounding.

## DEFINITION

Women's and girls' foundation garments including brassieres, girdles, corselettes, corsets and pantie girđles.

## SECTOR PROFILE

- Based on the latest statistics available (1977), the foundation garment industry is comprised of 13 firms which together account for 28 establishments.
- Total employment in this sector decreased from 3,730 in 1976 to 3,407 in 1977.
- Hourly earnings for production workers increased from \$3.48 in 1976 to $\$ 3.83$ in 1977 to $\$ 4.05$ in 1978.
- Regionally speaking, the industry is located primarily in Québec ( 64 percent) and Ontario (32 percent).
- Major centres of production in order of importance are Montréal, Toronto and Québec City.
- 5 firms in the sector are multi-nationals.
- Firms producing foundations garments also make swimwear and lingerie.
- Total sales of domestic producers were $\$ 88$ million in 1978.

1975


20,156 20,836 22,052 21,360
Domestic Shipments ${ }^{(1)}$

| Less Exports ${ }^{(1)}$ | 193 | 234 | 156 | 121 | 132 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Net Domestic Shipments | 22,439 | 19,923 | 20,680 | 21,931 | 21,228 |
| Imports | 2,503 | 3,59? | 2,643 | 2,030 | 2,552 |
| Apparent Canadian Market | 24,942 | 23,51.4 | 23,323 | 23,961 | 23,780 |


| Share of Market held by | $-\ldots-$ percent --- |  |  |  |  |
| :--- | :--- | :---: | :---: | :---: | :---: |
| Net Domestic Shipments | 90 | 85 | 89 | 92 | 89 |
| Imports | 10 | 15 | 11 | 8 | 11 |

## FOUNDATION GARMENTS

## IMPORTS

CONTROL NO, 43

| SOURCE | 1275 | 1976 | 1977 | 1978 | 1979 | Restraint levels 1981 |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| RESTRAINED |  |  | 1000 g | ents - |  |  |
| Philippines | 727 | 1,567 | 793 | 693 | 810 | 1,461 |
| Hong Kong | 588 | 850 | 621 | 487 | 587 | 764 |
| Korea, R. of | - | 26 | 7 | - | - | 90(18) |
| Taiwan | 23 | 6 | $=$ | - | $\underline{-}$ | 26 |
| Total Restrained | 1,338 | 2,449 | 1,421 | 1,180 | 1,397 | 2,341 |

UNRESTRAINED LOW-COST

| Mexico | - | - | 49 | 4 | 17 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Puerto Rico | - | 9 | - | neg | 15 |
| Barbados | - | - | - | - | 2 |
| Brazil | 9 | - | - | - | neg |
| Venezuela | - | - | - | 7 | - |
| Jamaica | - | 70 | 10 | - | - |
| Trinidad | - | -12 | - | - | - |
| Total Unrestrained |  |  |  |  |  |
| Low-Cost | 9 | 91 | 68 | 11 | 34 |


| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| DEVELOPED |  |  | --- '000 garments --- |  |  |
| U.S.A. | 579 | 566 | 592 | 545 | 619 |
| France | 154 | 60 | 133 | 120 | 254 |
| United Kingdom | 294 | 363 | 391 | 104 | 145 |
| Sweden | 31 | 11 | 14 | 52 | 37 |
| Switzerland | 21 | 10 | 4 | 1 | 19 |
| Austria | - | neg | neg | - | 8 |
| Germany, West | 5 | 38 | 11 | 11 | 7 |
| Italy | neg | - | - | 3 | 7 |
| Netherlands | - | neg | - | - | 2 |
| Belgium | 1 | - | - | - | - |
| Japan | 48 | - | - | - | - |
| Australia | 3 | - | = | - $=$ | - |
| Total Developed | 1,136 | 1,048 | 1,145 | 836 | 1,098 |

OTHER

| Yugoslavia | - | - | - | - | 18 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Portugal | 3 | - | - | - | 4 |
| Israel | 15 | - | 2 | - | 1 |
| Spain | - | 5 | 8 | - | - |
| Total Other | 18 | 5 | 10 | - | 23 |
|  |  |  |  |  |  |
| TOTAL OTHER SOURCES | 2,503 | 3,592 | 2,643 | 2,030 | 2,552 |

Totals may not add due to rounding.

## DEFINITION

Swimsuits- men's, boys', women's, girls', children's and infants', wholly or mainly by weight of cotton, man-made fibres or wool, or blends thereof, being garments normally worn for swimming and bathing. Included are swimming trunks and bathing suits.

## SECTOR PROFILE

- Based on the latest statistics available (1976) the Canadian swimsuit industry is comprised of 22 firms.
- Regionally speaking the industry is located primarily in Québec (68 percent) and Ontario ( 29 percent).
- Major centres of production in order of importance are Montréal and Toronto.
- There is no published data available on total employment in this sector. From a survey of 6 producers, accounting for 57 percent of domestic shipments, production employees were reported as being 695 in 1978.
- Domestic shipments of swimsuits decreased by 10 percent in 1979 over 1978. 1979 followed an above average shipment year in 1978 and was slightly above 1975 levels.

|  | 1975 | 1976 | 1977 | $\underline{1978}$ | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | --- '000 garments --- |  |  |  |  |
| Domestic Shipments ${ }^{(1)}$ | 3,778 | 3,490 | 3,788 | 4,265 | 3,854 |
| Less Exports ${ }^{(1)}$ | nil | nil | nil | nil | nil |
| Net Domestic Shipments | 3,778 | 3,490 | 3,788 | 4,265 | 3,854 |
| Imports | 2,979 | 3,705 | 3,105 | 2,549 | 2,954 |
| Apparent Canadian Market | 6,757 | 7,195 | 6,893 | 6,814 | 6,808 |
| Share of Market held by |  |  | percent |  |  |
| Net Domestic Shipments | 56 | 49 | 55 | 63 | 57 |
| Imports | 44 | 51 | 45 | 37 | 43 |


| SOURCE | $\underline{1975}$ | $\underline{1976}$ | $\underline{1977}$ | $\underline{1978}$ | 1979 | Restraint <br> levels <br> 1981 |
| :--- | ---: | ---: | ---: | ---: | ---: | ---: | ---: |
| RESTRAINED |  |  |  |  |  |  |

UNRESTRAINED LOW-COST

| Philippines | 1 | 1 | 12 | 18 | 19 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Brazil | 25 | neg | neg | 6 | 3 |
| Peru | - | - | - | - | 1 |
| Singapore | - | - | - | - | neg |
| Barbados | - | - | - | - | neg |
| Hungary | - | 8 | - | - | - |
| Morocco | 2 | - | - | - | - |
| India | neg | - | - | - | - |
| Venezuela | neg | neg | - | - | - |
| Jamaica | neg | - | - | - | - |
| Other | neg | - | - | - | - |
| Total Unrestrained |  |  |  |  |  |
| Low-Cost | 28 | 9 | 12 | 24 | 23 |


| SOURCE | 1275 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| DEVELOPED |  | -- | '000 garments --- |  |  |
| U.S.A. | 524 | 705 | 494 | 380 | 325 |
| France | 188 | 110 | 100 | 106 | 93 |
| Italy | 62 | 88 | 96 | 68 | 88 |
| United Kingdom | 79 | 114 | 66 | 72 | 24 |
| Sweden | 33 | 6 | 6 | 14 | 9 |
| Germany, West | 26 | 14 | 13 | 10 | 8 |
| Austria | 1 | 6 | 6 | - | 4 |
| Switzerland | 2 | 3 | 1 | 1 | 2 |
| Finland | 1 | 1 | - | 2 | 2 |
| Australia | 1 | 1 | 1 | neg | neg |
| Netherlands | 2 | 1 | 1 | 1 | neg |
| Belgium | neg | - | - | neg | neg |
| Japan | neg | - | 8 | 7 | - |
| Denmark | neg | neg | 1 | - | - |
| Total Developed | 919 | 1,049 | 793 | 661 | 555 |
| OTHER |  |  |  |  |  |
| Israel | 124 | 138 | 95 | 78 | 50 |
| Spain | 52 | 27 | 11 | 8 | 3 |
| Greece | 2 | 2 | 3 | - | - |
| Total Other | 178 | 167 | 109 | 86 | 53 |
| TOTAL ALL SOURCES | 2,979 | 3,705 | 3,105 | 2,549 | 2,954 |

Totals may not add due to rounding.

## DEFINITION

Underwear - Men's, boys', women's, girls', children's and infants' which is wholly or mainly by weight of cotton, man-made fibres or wool, or blends thereof, including apparel commonly referred to as slips and bloomers.

## SECTOR PROFILE

- Based on the latest statistics available (1976) the underwear industry is comprised of 53 establishments.
- Regionally speaking the industry is located primarily in Québec ( 72 percent) and Ontario ( 25 percent).
- Montréal is the major centre of production but smaller urban centres in Ontario and the eastern townships of Québec are also important centres of production.
- Based on analysis, 78 percent of all underwear was knitted and 22 percent woven. The same analysis revealed 52 percent was women's and girls', 43 percent men's and boys' and 5 percent children's and infants'.
- There are no published data on total employment in this sector. From a survey of 18 firms in 1978, representing 58 percent of domestic shipments of underwear, production employees were reported as being 3,651.


## APPARENT CANADIAN MARKET



| Share of Market held by | --- percent --- |  |  |  |  |
| :--- | :---: | :---: | :---: | :---: | :---: |
| Net Domestic Shipments | 86 | 82 | 88 | 89 | 88 |
| Imports | 14 | 18 | 12 | 11 | 12 |


| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 | $\begin{gathered} \text { Restraint } \\ \text { levels } \\ 1981 \end{gathered}$ |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| RESTRAINED | --- '000 garments --- |  |  |  |  |  |
| Hong Kong | 6,064 | 10,927 | 6,261 | 6,014 | 5,156 | 6,588 |
| Taiwan | 1,584 | 3,364 | 2,356 | 2,243 | 2;299 | 2,395 |
| Philippines | 520 | 188 | 208 | 320 | 237 | 247 |
| Korea, R. of | 32 | 15 | 908 | 288 | 96 | (18) |
| Total Restrained | 8,200 | 14,494 | 9,733 | 8,865 | 7,788 | 9,230 |

UNRESTRAINED LOW-COST

| Poland | 180 | 36 | 76 | 136 | 1,608 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| China, P.R. of | 229 | 525 | 215 | 304 | 1,111 |
| Mexico | 35 | 110 | 239 | 209 | 178 |
| Pakistan | 517 | 362 | 141 | 74 | 138 |
| Brazil | 24 | 47 | 17 | 11 | 68 |
| Singapore | - | - | - | 1 | 30 |
| India | 1 | 8 | - | - | 8 |
| Malta | - | 27 | - | - | neg |
| Czechoslovakia | 6 | 26 | - | - | - |
| Romania | - | 162 | 13 | 117 | - |
| Morocco | - | 22 | 18 | 8 | - |
| Venezuela | - | - | 1 | 8 | - |
| Jamaica | - | -97 | - | - | - |
| Total Unrestrained |  |  |  |  |  |
| Low-Cost | 992 | 1,422 | 720 | 868 | 3,141 |


| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| DEVELOPED |  | --- '000 garments --- |  |  |  |
| Italy | 516 | 802 | 711 | 643 | 1,317 |
| U.S.A. | 744 | 1,197 | 574 | 685 | 881 |
| United Kingdom | 1,316 | 1,403 | 682 | 816 | 586 |
| France | 762 | 452 | 631 | 439 | 322 |
| Germany, West | 21 | 29 | 44 | 59 | 23 |
| Norway | 13 | 15 | 38 | 40 | 15 |
| Netherlands | 52 | 51 | 29 | 8 | 7 |
| Japan | 4 | 105 | 18 | 3 | 7 |
| New Zealand | - | - | - | - | 4 |
| Denmark | 102 | 17 | 10 | - | 3 |
| Finland | neg | 2 | 36 | 3 | 3 |
| Switzerland | 6 | 7 | 4 | 3 | 3 |
| Sweden | 1 | 5 | 6 | 1 | 1 |
| Belgium | 1 | 3 | neg | neg | neg |
| Austria | 6 | 8 | 10 | 6 | - |
| South Africa | - | 2 | - | - | - |
| Australia | 4 | 4 | 3 | 6 | - |
| Total Developed | 3,548 | 4,102 | 2,796 | 2,712 | 3,172 |

OTHER

| Spain | 832 | 1,307 | 622 | 499 | 515 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Portugal | 34 | 1 | - | neg | 25 |
| Greece | 23 | 9 | 5 | 20 | 3 |
| Israel | -912 | -626 | - | -10 | -3 |
| Total Other | 1,801 | 1,943 | 627 | 529 | 546 |
|  |  |  |  |  |  |
| TOTAL ALL SOURCES | 14,543 | 21,963 | 13,877 | 12,975 | 14,648 |

Totals may not add due to rounding.

## DEFINITION

46.1 Jackets (excluding leather jackets) - an outerwear garment covering the upper part of the body, not extending to the knees, including woven ponchos, vests and boleros, not lined or designed to protect against the cold.
46.2 Overcoats and Topcoats - an outerwear garment extending to the knee or below, excluding rainwear and leather coats.
46.3 Professional and Shopcoats - one piece garments, including barber coats, clinical coats, medical coats, laboratory coats and surgical gowns.

## SECTOR PROFILE

- Based on the latest statistics available the Canadian industry as defined is comprised of 289 firms.
- Regionally speaking, the industry is located primarily in Québec ( 52 percent) and Ontario ( 25 percent).
- Major centres of production in order of importance are Montréal and Toronto.
- In 1979, outer-jackets accounted for 41 percent of total domestic shipments in this sector; overcoats and topcoats 35 percent; and professional and shopcoats 24 percent.
- There is no published data available on total employment in this sector. From a survey of 91 companies in 1978, representing 43 percent of domestic shipments, production employees were reported as being 1,982 .
- Firms in this industry also produce pants and raincoats.
- The 19 percent increase in domestic shipments of overcoats and topcoats (Control No. 46.2) in 1979 over 1978 was offset by a comparable decrease in shipments of leather coats and jackets (Control No. 48). The combined increase in domestic shipments of both items (Control Nos. 46.2 and 48) in 1979 over 1978 was 1 percent. Compared to 1975 , combined 1979 domestic shipments were lower by 6 percent.
- Professional and shopcoat (Control No. 46.3) domestic shipments increased by 17 percent in 1979 over 1978 but were still below 1975 levels.


## APPARENT CANADIAN MARKET <br> CONTROL NO. 46

$1975 \quad \frac{1976}{} \quad \underline{1977} \quad \underline{1978} \quad \underline{0}$

| Domestic Shipments ${ }^{(1)}$ | 7,994 | 10,427 | 8,408 | 8,474 | 9,667 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Less Exports ${ }^{(1)}$ | 462 | 366 | 314 | 214 | 249 |
| Net Domestic Shipments | 7,532 | 10,061 | 8,094 | 8,260 | 9,418 |
| Imports ${ }^{(6)}$ | 5,000 | 8,492 | 4,850 | 4,535 | 4,946 |
| Apparent Canadian Market | 12,532 | 18,553 | 12,944 | 12,795 | 14,364 |
| Share of Market held by |  | -- | rcent - |  |  |
| Net Domestic Shipments | 60 | 54 | 63 | 65 | 66 |
| Imports | 40 | 46 | 37 | 35 | 34 |

## OUTER-JACKETS

## IMPORTS <br> CONTROL NO. 46

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |  |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| REST'RAINED |  |  | -- | garme | --- |  |
| Korea, R. of | 2,103 | 3,738 | 2,499 | 2,121 | 1,395 | 2,726 |
| Hong Kong | 744 | 1,163 | 467 | 513 | 491 | 871 |
| China, P. R. of | 501(10) | 859 | 252 | 99 | 377 | 610(5) |
| Taiwan | 420 | 1,019 | 470 | 497 | 368 | 475 |
| Romania | 173 | 83 | 133 | 37 | 174 | 378 |
| Bulgaria | - | 18 | 13 | 52 | 103 | 169 |
| India | 36 (10) | 35 | 10 | 14 | 75 | 318 |
| Sri Lanka | - | - | - | - | 71 | 341 |
| Singapore | 30(10) | 2 | 4 | neg | 53 | $337(3)$ |
| Macao | 24 | 9 | - | 46 | 35 | 169 |
| Total Restrained | 4,031 | 6,926 | 3,848 | 3,379 | 3,142 | 6,394(4) |



## OUTER-JACKETS

| IMPORTS (Continued) |  |  |  | CONTROL NO: 46 |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
| SOURCE | 1975 | 1976 | 1977 | $\underline{1978}$ | 1979 |
| DEVELOPED | -.. ${ }^{\text {a }} 000$ garments -.. |  |  |  |  |
| U.S.A. | 362 | 732 | 384 | 415 | 512 |
| United Kingdom | 96 | 123 | 143 | 1.68 | 137 |
| France | 36 | 45 | 39 | 121 | 108 |
| Italy | 11 | 17 | 14 | 63 | 107 |
| Germany, West | 20 | 30 | 30 | 45 | 45 |
| Japan | 39 | 62 | 77 | 29 | 24 |
| Iceland | 2 | 1. | 1 | 11 | 22 |
| Ireland | 2 | 4 | 2 | 10 | 12 |
| Sweden | 6 | 5 | 4 | 24 | 11 |
| Finland | 2 | 3 | 3 | 7 | 7 |
| Belgium | 19 | 3 | 2 | 22 | 5 |
| Austria | 3 | 2 | 2 | 4 | 4 |
| South Africa |  | neg | 2 | 2 | 4 |
| Netherlands | 3 | 1 | neg | 2 | 4 |
| Denmark | 3 | 4 | 2 | 4 | 3 |
| Switzerland | 2 | 2 | I | 5 | 3 |
| New Zealand | 1. | neg | neg | 1 | 1 |
| Australia | 1 | 1 | neg | 1 | neg |
| Norway | 3 | 1 | 1 | 1 | neg |
| Total Developed | 611 | 1,036 | 707 | 935 | 1,009 |
| OTHER |  |  |  |  |  |
| Spain | 93 | 82 | 68 | 75 | 20 |
| Israel | 3 | 4 | 8 | 6 | 3 |
| Portugal | - | - | neg | neg | 2 |
| Yugoslavia | 1 | 3 | 2 | neg | neg |
| Greece | - | neg | - | 3 | neg |
| Total Other | 97 | 89 | 78 | 84 | 25 |
| TOTAL ALL SOURCES | 5,000 | 8,492 | 4,850 | 4,535 | 4,946 |

Totals may not add due to rounding.

## APPARENT CANADIAN MARKET

1975
$\underline{1975} \frac{1976}{} \quad \underline{1977} \quad \underline{1979}$

3,651
5,001
3,526
3,682
3,995
Domestic Shipments ${ }^{(1)}$
Less Exports ${ }^{(1)}$
Net Domestic Shipments
Imports ${ }^{(6)}$
Apparent Canadian Market

Share of Market held by
Net Domestic Shipments
Imports

| 28 | $\frac{36}{3,623}$ | 4,965 | 3,501 | 3,661 |
| ---: | ---: | ---: | ---: | ---: |
| 5,030 | $\frac{7,096}{3,653}$ | 12,061 | $\frac{3,726}{7,227}$ | $\frac{3,209}{6,870}$ | --- percent ---


| 41 | 48 | 53 | 53 |
| :--- | :--- | :--- | :--- |
| 59 | 52 | 47 | 47 |

# JACKETS - WOMEN'S, GIRLS', MEN'S, <br> BOYS', CHILDREN'S AND INFANTS' ( $0-6 x$ ) 

## IMPORTS

| SOURCE | 1975* | 1976 | 1977 | $\underline{1978}$ | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| RESTRAINED |  | --- '000 garments --- |  |  |  |
| Korea, R. of |  | 3,357 | 2,204 | 1,729 | 1,129 |
| Hong Kong |  | 955 | 332 | 329 | 378 |
| China, P. R. of |  | 859 | 252 | 99 | 377 |
| Taiwan |  | 834 | 357 | 325 | 293 |
| Romania |  | 37 | 50 | 12 | 96 |
| India |  | 35 | 10 | 14 | 75 |
| Sri Lanka |  | - | - | - | 71 |
| Singapore |  | 2 | 4 | neg | 53 |
| Macao |  | , | - | 46 | 35 |
| Bulgaria |  | - | - | - | - |
| Total Restrained | - | 6,088 | 3,209 | 2,554 | 2,507 |

UNRESTRAINED LOW-COST


## JACKETS - WOMEN'S, GIRLS', MEN'S, BOYS', CHILDREN ${ }^{7} S$ AND INFANTS' ( $0-6 x$ )

| IMPORTS (Continued) |  |  | CONTROL NO, 46.1 |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
| SOURCE | 1975* | 1976 | 1977 | 1978 | 1979 |
| DEVELOPED |  | -- | garm |  |  |
| U.S.A. |  | 541 | 196 | 199 | 219 |
| Italy |  | 5 | 4 | 43 | 72 |
| France |  | 20 | 16 | 91 | 71 |
| United Kingdom |  | 37 | 47 | 78 | 65 |
| Germany, West |  | 6 | 2 | 16 | 19 |
| Japan |  | 56 | 61 | 20 | 11 |
| Iceland |  | neg | 1 | 7 | 10 |
| Ireland |  | neg | neg | 6 | 7 |
| Belgium |  | neg | neg | 19 | 4 |
| Sweden |  | 1 | 2 | 20 | 4 |
| South Africa |  | neg | 1 | 2 | 4 |
| Finland |  | neg | 1 | 3 | 3 |
| Netherlands |  | 1 | neg | neg | 2 |
| Austria |  | 1 | neg | 1 | 1 |
| Denmark |  | 2 | 1 | 2 | 1 |
| Switzerland |  | 1 | 1 |  | 1 |
| New Zealand |  | neg | neg | 1 | 1 |
| Norway |  | 1 | 1 | 1 | neg |
| Australia |  | 1 | neg | 1 | neg |
| Total Developed Sources | - | 673 | 334 | 512 | 495 |

OTHER

| Spain |  | 80 | 68 | 75 | 19 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Israel |  | 2 | 5 | 5 | 3 |
| Yugoslavia |  | 1 | - | - | neg |
| Portugal |  | - | - | - | neg |
| Greece |  | neg | - | 3 | neg |
| Total Other | - | 83 | 73 | 83 | 22 |
| TOTAL ALL SOURCES | - | 7,096 | 726 | 209 | ,477 |

*Not available.
Totals may not add due to rounding

## APPARENT CANADIAN MARKET

1975

2,055
$\underline{397}$
1,658
750
2,408

3,182
3,035
3,627 --- percent ---
$1976 \quad 1977 \quad 1978$ 1979
--- '000 garments ---
2,326
2,393
2,782
3,321

| 267 | -231 | -153 | -162 |
| ---: | ---: | ---: | ---: |
| 2,059 | 2,162 | 2,629 | 3,159 |
| 1,123 | -873 | $\underline{998}$ | $\underline{1,102}$ |
| 3,182 | 3,035 | 3,627 | 4,261 |

Net Domestic Shipments
Imports 31
65
71
35
29
72
74

69
.

## IMPORTS

CONTROL NO, 46.2


UNRESTRAINED LOW-COST


| IMPORTS (Continued) |  |  | CONTROL NO, 46.2 |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
| SOURCE | 1275* | $\underline{1976}$ | 1977 | 1978 | 1979 |
| DEVELOPED |  | -- | garm | --- |  |
| United Kingdom |  | 85 | 96 | 85 | 68 |
| U.S.A. |  | 62 | 54 | 57 | 50 |
| France |  | 22 | 21 | 28 | 33 |
| Germany, West |  | 24 | 28 | 29 | 26 |
| Italy |  | 10. | 10 | 18 | 25 |
| Japan |  | 5 | 14 | 2 | 13 |
| Iceland |  | 1 | neg | 3 | 8 |
| Sweden |  | 4 | 2 | 4 | 7 |
| Ireland |  | 3 | 2 | 3 | 5 |
| Finland |  | 2 | 2 | 3 | 4 |
| Austria |  | 1 | 2 | 3 | 3 |
| Netherlands |  | neg | neg | 1 | 2 |
| Belgium |  | 3 | 2 | 3 | 1 |
| Denmark |  | 2 | 1 | 2 | 1 |
| Switzerland |  | 2 | 1 | 3 | 1 |
| Norway |  | neg | neg | neg | neg |
| Australia |  | - | neg | - | neg |
| New Zealand |  | - | neg | neg | neg |
| South Africa |  | - | 1 | - | - |
| Total Developed | - | 226 | 236 | 244 | 247 |
| OTHER |  |  |  |  |  |
| Portugal |  | - | neg | neg | 2 |
| Israel |  | 2 | 3 | 1 | 1 |
| Spain |  | 2 | neg | neg | 1 |
| Greece |  | neg | neg | 1 | neg |
| Yugoslavia |  | 2 | 2 | neg | neg |
| Total Other | - | 6 | 5 | 2 | 4 |
| TOTAL ALL SOURCES | - | 1,123 | 873 | 998 | 1,102 |
| *Not available. |  |  |  |  |  |
| Totals may not add due |  |  |  |  |  |

PROFESSIONAL \& SHOPCOATS WOMEN'S, GIRLS', MEN'S, BOYS'

## APPARENT CANADI AN MARKET

CONTROL NO, 46.3


| Domestic Shipments ${ }^{(1)}$ | 2,288 | 3,100 | 2,489 | 2,010 | 2,351 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Less Exports ${ }^{(1)}$ | 37 | 63 | 58 | 40 | 62 |
| Net Domestic Shipments | 2,251 | 3,037 | 2,431 | 1,970 | 2,289 |
| Imports | 220 | $\underline{273}$ | 251 | 328 | 367 |
| Apparent Canadian Market | 2,471 | 3,310 | 2,682 | 2,298 | 2,656 |


| Share of Market held by | --- percent --- |  |  |  |  |
| :--- | :---: | :---: | :---: | :---: | :---: |
| Net Domestic Shipments | 91 | 92 | 91 | 86 | 86 |
| Imports | 9 | 8 | 9 | 14 | 14 |

IMPORTS


UNRESTRAINED LOW-COST

| China, P. R. of | 64 | 54 | 5 | 17 |
| :--- | ---: | ---: | ---: | ---: |
| Pakistan | 7 | 13 | 12 | 13 |
| Poland | - | - | - | 7 |
| Philippines | - | - | neg | 1 |
| Argentina | - | - | - | 1 |
| Hungary | - | - | - | neg |
| India | - | - | 12 | neg |
| Bolivia | - | - | - | neg |
| Ecuador | - | - | - | neg |
| Uruguay | - | - | - | neg |
| Mexico | - | - | neg | neg |
| Indonesia | - | - | neg | - |
| Total Unrestrained |  |  |  |  |
| Low-Cost |  |  |  |  |
|  |  |  |  | 29 |

PROFESSIONAL \& SHOPCOATS -
WOMEN'S, GIRLS', MEN'S, BOYS'


## STRUCTURED SPORTCOATS, BLAZERS AND STRUCTURED SUITS

APPARENT CANADIAN MARKET CONTROL NO, 47

|  | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | --- '000 garments --- |  |  |  |  |
| Domestic Shipments ${ }^{(1)}$ | 3,742 | 3,705 | 3,831 | 3,428 | 3,751 |
| Less Exports ${ }^{(1)}$ | 148 | 158 | 108 | 79 | 62 |
| Net Domestic Shipments | 3,594 | 3,547 | 3,723 | 3,349 | 3,689 |
| Imports ${ }^{\text {( 8) }}$ | 569 | 807 | 540 | 677 | 865 |
| Apparent Canadian Market | 4,163 | 4,354 | 4,263 | 4,026 | 4,554 |
| Share of Market held by |  |  | percent |  |  |
| Net Domestic Shipments | 86 | 81 | 87 | 83 | 81 |
| Imports | 14 | 19 | 13 | 17 | 19 |

NOTE: See page 121 for Sector Profile.

## APPARENT CANADIAN MARKET

CONTROL NO, 47.1

|  | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  |  | --- | garmen |  |  |
| Domestic Shipments ${ }^{(1)}$ | 1,354 | 1,441 | 1,294 | 1,000 | 1,333 |
| Less Exports ${ }^{(1)}$ | nil | nil | nil | nil | nil |
| Net Domestic Shipments | 1,354 | 1,441 | 1,294 | 1,000 | 1,333 |
| Imports (8) | $\ldots 124$ | $\underline{163}$ | $\underline{160}$ | 203 | 292 |
| Apparent Canadian Market | 1,478 | 1,604 | 1,454 | 1,203 | 1,625 |
| Share of Market held by |  |  | ercent |  |  |
| Net Domestic Shipments | 92 | 90 | 89 | 83 | 82 |
| Imports | 8 | 10 | 11 | 17 | 18 |

NOTE: See page 121 for Sector Profile.

STRUCTURED SPORTCOATS \&,BLAZERS<br>- MEN'S AND BOYS'

IMPORTS

CONTROL NO, 47.1

SOURCE
RESTRAINED

| Korea, R. of | 32 | 36 | 74 | 40 | 77 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Philippines | - | - | - | - | 27 |
| Bulgaria | - | - | - | - | 26 |
| Poland | - | - | neg | 10 | 25 |
| Hong Kong | 33 | 13 | 3 | 10 | 16 |
| Taiwan | 2 | 55 | 14 | 51 | 13 |
| Hungary | - | 2 | 2 | 6 | 6 |
| China, P.R. of | 1 | - | - | - | 2 |
| Singapore | $-\overline{1}$ | - | 1 | neg | 1 |
| Macao | -14 | -10 | -7 | - | 1 |
| Romania | 94 | 117 | 101 | 117 | 194 |
| Total Restrained |  |  |  | - | - |

UNRESTRAINED LOW-COST

| Sri Lanka | - | - | - | - | 8 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| India | neg | neg | neg | neg | 8 |
| Czechoslovakia | 6 | 15 | 15 | 10 | 7 |
| Colombia | - | - | - | - | 5 |
| Uruguay | - | neg | - | - | 1 |
| Turkey | neg | neg | - | - | - |
| Pakistan | - | neg | - | - | - |
| Brazil | - | neg | - | - | - |
| El Salvador | 1 | - | - | - | - |
| Panama | - | - | - | - | - |
| Total Unrestrained |  |  |  |  |  |
| Low-Cost | 11 | 15 | 15 | 10 | 29 |

STRUCTURED SPORTCOATS \& BLAZERS<br>- MEN'S AND BOYS'

| IMPORTS (Continued) |  |  | CONTROL NO, 47.1 |  |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
| SOURCES | 1975 | 1976 | 1977 | 1978 | 1979 |
| DEVELOPED |  | --- | garme |  |  |
| France | 2 | 2 | 8 | 19 | 23 |
| Italy | 2 | 3 | 5 | 14 | 19 |
| U.S.A. | 2 | 2 | 9 | 28 | 16 |
| United Kingdom | 2 | 2 | 3 | 4 | 3 |
| Ireland | neg | neg | neg | neg | 3 |
| Germany, West | neg | 2 | 1 | 2 | 2 |
| Belgium | neg | neg | neg | neg | 1 |
| Finland | neg | neg | - | neg | 1 |
| Iceland | 1 | 2 | 1 | neg | 1 |
| Netherlands | neg | neg | neg | - | 1 |
| Japan | 6 | 10 | 12 | 2 | 1 |
| Austria | - | - | - | neg | neg |
| Denmark | neg | neg | - | - | neg |
| Sweden | neg | 1 | 1 | 3 | neg |
| Switzerland | neg | neg | neg | neg | neg |
| South Africa | 2 | 3 | 2 | 2 | neg |
| Australia | - | - | neg | - | - |
| Total Developed | 17 | 27 | 42 | 74 | 71 |

OTHER

| Greece | - | - | - | - | neg |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Portugal | - | - | - | - | neg |
| Yugoslavia | neg | 1 | 1 | - | neg |
| Spain | neg | neg | - | 1 | - |
| Israel | neg | -1 | neg | - | - |
| Total Other | neg | 2 | 1 | 1 | neg |
|  |  |  |  |  |  |
| TOTAL ALL SOURCES | 124 | 163 | 160 | 203 | 292 |

Totals may not add due to rounding.

# STRUCTURED SUITS 

- MEN'S AND BOYS'


## APPARENT CANADIAN MARKET

| 1975 | $\underline{1976}$ | $\underline{1977}$ | $\underline{1978}$ | $\underline{1979}$ |
| :--- | :--- | :--- | :--- | :--- |


| Domestic Shipments ${ }^{(1)}$ | 2,388 | 2,264 | 2,537 | 2,428 | 2,418 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| $\text { Less Exports }{ }^{(1)}$ | 148 | 158 | 108 | 79 | 62 |
| Net Domestic Shipments | 2,240 | 2,106 | 2,429 | 2,349 | 2,356 |
| Imports ${ }^{\text {( 8) }}$ | 445 | 644 | 380 | 474 | 573 |
| Apparent Canadian Market | 2,685 | 2,750 | 2,809 | 2,823 | 2,929 |
| Share of Market held by |  |  | ercent |  |  |
| Net Domestic Shipments | 83 | 77 | 86 | 83 | 80 |
| Imports | 17 | 23 | 14 | 17 | 20 |

NOTE: See page 121 for Sector Profile.

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| RESTRAINED |  | --- '000 garments ---- |  |  |  |
| Korea, R, of | 170 | 306 | 175 | 238 | 170 |
| Poland | 37 | 3 | 20 | 57 | 127 |
| Taiwan | 28 | 60 | 36 | 97 | 81 |
| Romania | 54 | 75 | 40 | - | 62 |
| Hungary | 7 | 9 | 6 | 22 | 34 |
| Hong Kong | 12 | 66 | 20 | 10 | 15 |
| Bulgaria | - | - | - | - | 12 |
| Philippines | 6 | 7 | 1 | 1 | 5 |
| Macao | - | - | - | - | 2 |
| Singapore | neg | 14 | - | - | - |
| China, P.R. of | 12 | $\underline{6}$ | 2 | - | - |
| Total Restrained | 326 | 546 | 300 | 425 | 508 |

UNRESTRAINED LOW-COST

| Czechoslovakia | 9 | 9 | 2 | 3 | 7 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Colombia | 8 | 8 | 9 | - | 4 |
| Brazil | 7 | 10 | - | - | neg |
| Uruguay | - | neg | - | neg | neg |
| Iran | neg | - | - | - | - |
| Morocco | neg | neg | - | - | - |
| India | neg | neg | neg | neg | - |
| Malaysia | 1 | neg | neg | - | - |
| Pakistan | neg | - | - | - | - |
| Korea, North | - | - | 1 | - | - |
| Thailand | neg | neg | - | - | - |
| Argentina | - | neg | - | - | - |
| Ecuador | - | neg | - | - | - |
| Virgin Islands | - | - | neg | - | - |
| Other | - | neg | - | - | - |
| tal Unrestraine w-Cost | 25 | 27 | 12 | 3 | 11 |

IMPORTS (Continued)

CONTROL NO, 47.2

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| DEVELOPED | --- '000 garments --- |  |  |  |  |
| France | 43 | 25 | 17 | 19 | 24 |
| Italy | 8 | 9 | 8 | 12 | 21 |
| U.S.A. | 6 | 4 | 3 | 4 | 6 |
| United Kingdom | 8 | 10 | 3 | 3 | 2 |
| Sweden | 1 | 2 | 1 | 2 | 1 |
| Ireland | neg | neg | neg | neg | neg |
| Belgium | 2 | 2 | 1 | 1 | neg |
| Finland | neg | neg | neg | - | neg |
| Germany, West | 4 | 4 | 1 | 1 | neg |
| Netherlands | neg | 1 | - | - | neg |
| Switzerland | 1 | neg | neg | neg | neg |
| South Africa | neg | neg | 1 | 4 | neg |
| Japan | 1 | 1 | 26 | - | neg |
| Austria | 3 | 1 | 1 | neg | - |
| Denmark | neg | neg | neg | neg | - |
| Norway | $\underline{1}$ | neg | 1 | neg | - |
| Total Developed | 78 | 59 | 63 | 46 | 5 |

OTHER

| Yugoslavia | 10 | 5 | 3 | neg | 1 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Portugal | neg | 1 | neg | neg | neg |
| Spain | 2 | 1 | neg | neg | neg |
| Greece | neg | neg | - | - | - |
| Israel | -2 | -3 | neg | neg | - |
| Total Other | 14 | 10 | 3 | neg | 1 |
|  |  |  |  |  |  |
| TOTAL ALL SOURCES | 445 | 644 | 380 | 474 | 573 |

Totals may not add due to rounding.

## DEFINETION

Leather outdoor jackets, overcoats, topcoats and sportcoats, men's, boys', women's and girls', children's and infants' ( $0-6 \mathrm{x}$ ) , including genuine leather, genuine sheepskin and genuine suede.

## SECTOR PROFILE

- Based on the latest statistics available (1976) the Canadian leather coat and jacket industry is comprised of 77 firms.
- From a survey of 24 firms in 1978, covering 49 percent of domestic shipments, production employees were reported as being 960.
- While the domestic market decreased by 73 percent between 1975 and 1979 and domestic shipments by 69 percent, imports during this same period decreased by 51 percent.
- The 42 percent decrease in domestic shipments of leather coats in 1979 over 1978 is consistent with a change in consumer demand. This decrease in domestic shipments was offset by a comparable increase in domestic shipments of fabric overcoats and topcoats (Control No. 46.2).
- At the present time, the industry is experiencing difficulties in obtaining leather and that which is available is at very inflated prices.

|  | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  |  | - | garme | - |  |
| Domestic Shipments ${ }^{(1)}$ | 2,251 | 1,867 | 1,447 | 1,214 | 707 |
| Less Exports ${ }^{(1)}$ | 379 | 342 | 426 | 408 | 223 |
| Net Domestic Shipments | 1,872 | 1,525 | 1,021 | 806 | 484 |
| Imports ${ }^{\text {(9) }}$ | 117 | 600 | 77 | 37 | 57 |
| Apparent Canadian Market | 1,989 | 2,125 | 1,098 | 843 | 541 |

Share of Market held by

| Net Domestic Shipments | 94 | 72 | 93 | 96 | 89 |
| :--- | ---: | ---: | ---: | ---: | :--- |
| Imports | 6 | 28 | 7 | 4 | 11 |

# LEATHER OUTDOOR JACKETS, OVERCOATS, TOPCOATS \& SPORTCOATS 

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 | $\begin{gathered} \text { Restraint } \\ \text { levels } \\ \underline{1981} \end{gathered}$ |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| RESTRAINED |  |  | '000 g | ts - |  |  |
| Korea, South | 22 | 341 | 21 | 1 | 11 | 117 |
| Taiwan | 2 | 15 | 2 |  | 1 | 2 |
| Total Restrained | 24 | 356 | 23 | 1 | 12 | 119 |

UNRESTRAINED LOW-COST

| Hong Kong | 22 | 74 | 4 | 3 | 7 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Argentina | 2 | 22 | 4 | 2 | 3 |
| Korea, North | - | 4 | - | - | 2 |
| Brazil | 3 | 4 | - | neg | 2 |
| Bulgaria | neg | 1 | neg | neg | 1 |
| Turkey | 2 | 2 | 1 | neg | 1 |
| Peru | neg | neg | neg | neg | 1 |
| Hungary | - | 1 | - | - | neg |
| Romania | neg | neg | neg | 1 | neg |
| India | 1 | 2 | 1 | neg | neg |
| China, P.R. of | - | - | - | neg | neg |
| Uruguay | 4 | 31 | 1 |  | neg |
| Venezuela | - | - | - | - | neg |
| Mexico | 7 | 13 | 1 | neg | neg |
| Leew-Wind | - | - | - |  | neg |
| Poland | neg | 1 | neg | neg | - |
| Morocco | - | neg | neg | - | - |
| Colombia | neg | neg | - | - | - |
| Other | - | - | neg | - | - |
| otal Unrestrained ow-Cost | 41 | 155 | 12 | 7 | 17 |



## OTHER

| Spain | 10 | 17 | 9 | 5 | 3 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Israel | 9 | 11 | 5 | 4 | 2 |
| Greece | - | - | neg | - | neg |
| Portugal | n/a | neg | neg | - | neg |
| Yugoslavia | n/a | 1 | neg | neg | - |
| Total Other | 19 | 29 | 14 | 9 | 5 |
| TOTAL ALL SOURCES | 117 | 600 | 77 | 37 | 57 |

Totals may not add due to rounding.

```
SHIRTS - MEN'S AND BOYS'
```


## DEFINITION

A garment covering the upper part of the body, with a tailored collar or full-fashioned collar and no body lining, of woven or knitted construction, normally worn next to the skin or directly over underwear, and with a full or partial front opening which may include a zipper. It may be designed to be worn inside or outside of pants.
a) Shirts with Tailored Collars

A "tailored collar" consists of one or more pieces of material which are cut and sewn or cut and fused and designed with two pointed or rounded ends. The following may be used, when needed, in the construction of a "tailored collar": stays, lining, stiffening by any means.
b) Other shirts include shirts with full-fashioned collar or without collars. A "full-fashioned collar" consists of a one-piece knitted-to-shape collar.

## SECTOR PROFILE

- Based on the latest statistics available, the Canadian men's and boys' shirt industry comprised 72 establishments in 1976.
- These establishments were primarily located in Québec (44 percent) and Ontario (35 percent).
- Major centres of production in order of importance are Montréal ( 32 percent) and Toronto ( 13 percent).
- In 1979 tailored collar shirts accounted for 73 percent of shipments in terms of units.
- There are no published statistics on total employment in this sector and this data is only partially being collected in the Textile and Clothing Board survey. The Parity Committee of the Shirt Industry in Québec reported the following employment data:

$$
\frac{1973}{4,500} \quad \frac{1974}{4,622} \quad \frac{1975}{4,449} \quad \frac{1979}{4,116}
$$

- The average annual increase in domestic shipments of tailored collar shirts (Control No. 49.1) between 1975 and 1979 was 4.6 percent. The corresponding increase for full-fashioned collar shirts (Control No. 49.2) was 4.2 percent.


## APPARENT CANADIAN MARKET

$1975 \quad \underline{1976} \xrightarrow{1977} \quad \underline{1978}$

| Domestic Shipments (1) | 22,427 | 23,487 | 21,585 | 24,555 | 26,458 |
| :--- | :--- | :--- | :--- | :--- | :--- |
| Less Exports (1) | $\underline{134}$ | $\underline{127}$ | $\underline{124}$ | $\underline{256}$ | $\underline{173}$ |
| Net Domestic Shipments | 22,293 | 23,360 | 21,341 | 24,299 | 26,285 |
| Imports ${ }^{(2)}$ | $\underline{18,480}$ | $\underline{23,635}$ | $\underline{20,308}$ | $\underline{15,050}$ | $\underline{17,136}$ |
| Apparent Canadian Market | 40,773 | 46,995 | 41,649 | 39,349 | 43,421 |


| Share of Market held by | --- percent --- |  |  |  |  |
| :--- | :---: | :---: | :---: | :---: | :---: |
| Net Domestic Shipments | 55 | 50 | 51 | 62 | 61 |
| Imports | 45 | 50 | 49 | 38 | 39 |


| SOURCE | 1975 | 1976 | 1971 | 1978 | 1979 | $\begin{gathered} \text { Restraint } \\ \text { levels } \\ 1981 \end{gathered}$ |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| RESTRAINED |  |  | 1000 | ments |  |  |
| Korea, R. of | 5,221 | 6,370 | 5,942 | 5,631 | 5,010 | 5,708 |
| Hong Kong | 3,317 | 4,599 | 4,266 | 2,873 | 3,219 | 3,462 |
| Taiwan | 4,116 | 6,187 | 4,921 | 3,758 | 2,782 | 4,273 |
| China, P.R. of | 1,814 | 1,998 | 2,203 | 1,066 | 2,115 | 2,005 (5) |
| Malaysia | 250 | 607 | 367 | 361 | 643 | 791 |
| Romania | 503 | 433 | 147 | 183 | 544 | 657 |
| India | 322 | 273 | 224 | 106 | 377 | 309 (19) |
| Thailand | 1 | 1 |  | 13 | 220 | 371 (19) |
| Bulgaria | 54 | 8 | 7 | neg | 177 | 212 |
| Poiand | 278 | 287 | 168 | 94 | 155 | 386 |
| Singapore | 100 | 39 | 33 | 19 | 145 | $337(3+19)$ |
| Sri Lanka | - | - | 5 | 4 | 121 | 325 |
| Macao | 32 | 21 | 11 | 6 | 76 | 112 ( ) |
| Philippines | 116 | 154 | neg | neg | 49 | 369 (15) |
| Total Restrained | 16,124 | 20,977 | 18,297 | 14,114 | 15,633 | 19,317 (4) |

UNRESTRAINED LOW-COST

| Malaysia | 100 | 205 | 206 | 37 | 67 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Hungary | neg | 13 | 10 | 3 | 62 |
| Pakistan | 813 | 840 | 314 | 12 | 61 |
| Indonesia | - | - | - | - | 56 |
| Honduras | - | - | - | - | 22 |
| Parama | - | - | - | - | 19 |
| Cyprus | - | - | - | - | 12 |
| Mexico | 4 | 10 | 4 | 3 | 2 |
| Puerto Rico | - | - | - | 6 | 2 |
| Brazil | 20 | 103 | 6 | neg | 1 |
| Uruguay | - | - | neg | - | 1 |
| Haiti | - | - | 1 | - | 1 |
| Sri Lanka | - | - | 3 | neg | neg |
| Ecuador | neg | neg | neg | neg | neg |
| Guatemala | 30 | 2 | 1 | neg | neg |
| Bulgaria | neg | 2 | 4 | 4 | - |
| Turkey | - | 5 | neg | - | - |
| Morocco | - | - | - | 1 | - |
| Togo | - | 3 | 2 | 5 | - |
| Afghanistan | - | 2 | 2 | - | - |
| Colombia | - | - | - | 1 | neg |
| Other | - | - | - | - |  |

Total Unrestrained
Low-Cost
567
69 306

| (Continued) |  |  |  | CONTROL NO, 49 |  |
| :---: | :---: | :---: | :---: | :---: | :---: |
| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| DEVELOPED |  |  | '000 g | ts - |  |
| U.S.A. | 787 | 901 | 799 | 508 | 761 |
| Italy | 124 | 98 | 106 | 93 | 213 |
| France | 144 | 115 | 76 | 116 | 97 |
| United Kingdom | 233 | 172 | 77 | 37 | 48 |
| Germany, West | 18 | 14 | 13 | 35 | 42 |
| South Africa | - | - | neg | 1 | 7 |
| New Zealand | neg | neg | neg | 1 | 4 |
| Belgium | 1 | 2 | 1 | 1 | 3 |
| Netherlands | 2 | 4 | 4 | 8 | 3 |
| Switzerland | 2 | 3 | 6 | 11 | 3 |
| Japan | 59 | 66 | 331 | 35 | 3 |
| Austria | 2 | 7 | 4 | neg | 1 |
| Iceland | - | - | - | - | 1 |
| Sweden | neg | neg | 1 | 1 | I |
| Ireland | neg | 2 | neg | 1 | neg |
| Denmark | 2 | 9 | 4 | neg | neg |
| Finland | 1 | 3 | neg | neg | neg |
| Norway | - | - | neg | - | - |
| Australia | neg | 1 | neg | 1 | - |
| Total Developed | 1,375 | 1,397 | 1,422 | 849 | 1,187 |

## OTHER

| Spain | 2 | 5 | 2 | 6 | 5 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Greece | - | - | - | neg | 2 |
| Portugal | 3 | 4 | 6 | 7 | 1 |
| Israel | 3 | 59 | 12 | 3 | 1 |
| Yugoslavia | - | - | - | - | $-n e g$ |
| Total Other | 8 | 68 | 20 | 16 | 9 |
|  |  |  |  |  |  |
| TOTAL ALI SOURCES | 18,480 | 23,635 | 20,308 | 15,050 | 17,136 |

Totals may not add due to rounding.

## APPARENT CANADIAN MARKET

| Domestic Shipments ${ }^{(1)}$ | 16,404 | 16,424 | 16,657 | 17,964 | 19,423 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Less Exports ${ }^{(1)}$ | 88 | 76 | 208 | 219 | 128 |
| Net Domestic Shipments | 16,316 | 16,348 | 16,449 | 17,745 | 19,295 |
| Imports ${ }^{\text {(2) }}$ | 12,545 | 16,366 | 12,812 | 13,199 | 14,713 |
| Apparent Canadian Market | 28,861 | 32,714 | 29,261 | 30,944 | 34,008 |

Share of Market held by Net Domestic Shipments Imports 43
 --- percent ---

50
56
57
43
50
44
43

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| RESTRAINED |  | --- '000 garments ---- |  |  |  |
| Korea, South | 4,370 | 5,113 | 3,803 | 5,260 | 4,679 |
| Hong Kong | 2,895 | 3,538 | 2,730 | 2,569 | 2,878 |
| Taiwan | 2,300 | 3,925 | 3,149 | 3,194 | 2,365 |
| China, P.R. of | 1,314 | 1,494 | 1,410 | 990 | 1,965 |
| Malaysia | 250 | 607 | 367 | 361 | 643 |
| India | 206 | 204 | 143 | 68 | 245 |
| Bulgaria | 54 | 8 | 7 | neg | 177 |
| Thailand | 1 | 1 | 2 | 10 | 172 |
| Romania | 40 | 50 | 94 | 45 | 133 |
| Sri Lanka | - | - | 5 | 4 | 121 |
| Singapore | 64 | 29 | 21 | 14 | 107 |
| Macao | 20 | 14 | 7 | 6 | 76 |
| Philippines | 74 | 99 | neg | neg | 25 |
| Poland | 25 | 45 | 108 | 3 | 4 |
| Total Restrained | 11,613 | 15,127 | 11,846 | 12,524 | 3,590 |

UNRESTRAINED LOW-COST

| Hungary | neg | 8 | 7 | 3 | 62 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Indonesia | - | - | - | - | 56 |
| Pakistan | 21 | 36 | 16 | 10 | 50 |
| Honduras | - | - | - | - | 22 |
| Panama | - | - | - | - | 19 |
| Cyprus | - | - | - | - | 12 |
| Puerto Rico | - | - | - | 6 | 2 |
| Uruguay | - | - | neg | - | 1 |
| Haiti | - | - | 1 | - | 1 |
| Mexico | 3 | 8 | 2 | 2 | 1 |
| Brazil | 15 | 77 | 4 | neg | neg |
| Ecuador | neg | neg | neg | neg | neg |
| Guatemala | 1 |  | 1 | neg | neg |
| Turkey | neg | 3 | neg |  |  |
| Moroceo | 2 | 5 | 9 | 1 | - |
| Togo | - | - | - | 3 | - |
| Afganistan | 1 | 2 | 1 | 1 | - |
| Colombia | - | 2 | 2 | - | - |
| Other | - | - | - | 1 | neg |
| otal Unrestrained ow-Cost | 43 | 142 | 43 | 27 | 226 |
|  |  |  |  |  | Conti |

## CONTROL NO. 49.1

| SOURCE | 1975 | 1976 | 1977 | $\underline{1978}$ | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| DEVELOPED |  | --- '000 garments --- |  |  |  |
| U.S.A. | 503 | 673 | 512 | 358 | 537 |
| Italy | 79 | 73 | 68 | 84 | 194 |
| France | 92 | 86 | 49 | 94 | 78 |
| Germany, West | 12 | 11 | 8 | 28 | 34 |
| United Kingdom | 149 | 128 | 49 | 19 | 24 |
| South Africa | - | - | neg | 1 | 7 |
| Belgium | 1 | 1 | 1 | 1 | 3 |
| Switzerland | 2 | 3 | 4 | 10 | 3 |
| Netherlands | 2 | 3 | 2 | 7 | 2 |
| Japan | 37 | 50 | 212 | 31 | 2 |
| Iceland | - | - | - | - | 1 |
| New Zealand | neg | neg | neg | neg | 1 |
| Ireland | neg | 2 | neg | , | neg |
| Austria | 1 | 5 | 3 | neg | neg |
| Denmark | 1 | 7 | 3 | neg, | neg |
| Finland | 1 | 2 | neg | neg | neg |
| Norway | - | - | neg | - | - |
| Sweden | neg | neg | 1 | - | - |
| Australia | neg | 1 | neg | neg | - |
| Total Developed | 880 | 1,045 | 912 | 634 | 886 |

OTHER

## Spain

Greece
Israel
Portugal
Iugoslavia
Total Other

TOTAL ALL SOURCES
12,545
16,366
12,812
13,199
14,713

Totals may not add due to rounding.

|  | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | --- '000 garments --- |  |  |  |  |
| Domestic Shipments ${ }^{(1)}$ | 6,023 | 7,063 | 4,928 | 6,591 | 7,035 |
| Less Exports ${ }^{(1)}$ | 46 | 51 | 36 | 37 | 45 |
| Net Domestic Shipments | 5,977 | 7,012 | 4,892 | 6,554 | 6,990 |
| Imports ${ }^{\text {(2) }}$ | 5,934 | -7,270 | 7,496 | 1,851 | 2,424 |
| Apparent Canadian Market | 11,911 | 14,282 | 12,388 | 8,405 | 9,414 |
| Share of Market held by |  |  | percent |  |  |
| Net Domestic Shipments | 50 | 49 | 39 | 78 | 74 |
| Imports | 50 | 51 | 61 | 22 | 26 |

## IMPORTS

SOURCE
RESTRAINED
Taiwan
Hong Kong
Korea, South
Poland
China, P.R. of
India
Thailand
Singapore
Philippines
Macao
Total Restrained

UNRESTRAINED LOW-COST

| Malaysia | 100 | 205 | 206 | 37 | 67 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Pakistan | 792 | 804 | 298 | 2 | 11 |
| Mexico | 1 | 3 | 1 | 1 | 1 |
| Uruguay | - | - | - | - | 1 |
| Brazil | 5 | 26 | 2 | neg | neg |
| Sri Lanka | - | - | 3 | neg | neg |
| Guatemala | neg | neg | neg | neg | neg |
| Bulgaria | 30 | 5 | 4 | - | - |
| Hungary | - | 5 | 4 | - | - |
| Turkey | - | 1 | - | - | - |
| Morocco | - | - | 5 | neg | - |
| Togo | - | - | - | 2 | - |
| Afghanistan | neg | 1 | 1 | neg | - |
| Colombia | - | - | 1 | - | - |
| Ecuador | neg | neg | neg | neg | - |
| Haiti | - | - | neg | - | - |
| Other | - | - | - | neg | - |
| tal Unrestr ow-Cost | 928 | 1,050 | 525 | 42 | 80 |


| GOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| DEVELOPED |  |  |  |  |  |
| U.S.A. | 283 | 227 | 288 | 149 | 224 |
| United Kingdom | 84 | 43 | 28 | 18 | 24 |
| Italy | 45 | 25 | 38 | 9 | 20 |
| France | 52 | 29 | 27 | 22 | 18 |
| Germany, West | 7 | 4 | 5 | 7 | 8 |
| New Zealand | neg | neg | - | 1 | 3 |
| Austria | neg | 2 | 1 | neg | 1 |
| Sweden | neg | neg | neg |  | 1 |
| Belgium | neg | neg | 1 | 1 | neg |
| Netherlands | neg | 1 | 1 | 1 | neg |
| Switzerland | neg | 1 | 2 | 1 | neg |
| Japan | 21 | 17 | 119 | 4 | neg |
| Ireland | neg | 1 | neg | neg | - |
| Denmark | 1 | 2 | 2 | - | - |
| Finland | neg | 1 | - | - | - |
| Norway | - | - | neg | - | - |
| Australia | neg | neg | neg | neg | - |
| Total Developed | 493 | 353 | 512 | 214 | 299 |

## OTHER

| Portugal | - | - | 2 | 3 | 1 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Spain | neg | 1 | 1 | neg | neg |
| Israel | 1 | -15 | -1 | - | - |
|  | 1 | 16 | 7 | 3 | 1 |
|  |  |  |  |  |  |
| TOTAL ALI SOURCES | 5,934 | 7,270 | 7,496 | 1,851 | 2,424 |

Totals may not add due to rounding.

## DEFINITION

Men's, boys', women's, girls', children's and infants' sweaters, pullovers, cardigans and ponchos which cover the upper part of the body, and which are of constructions coarser than 19 cut, that is less than 19 vertical stitches per inch.

## SECTOR PROFILE

- Based on the latest statistics available (1976) the sweater industry is comprised of 78 establishments.
- Regionally speaking the industry is located primarily in Québec ( 70 percent) and Ontario ( 25 percent).
- Major centres of production are Montréal and Toronto.
- In 1979 in unit terms women's and girls' sweaters had 58 percent of the sector's shipments, followed by men's and boys' with 35 percent and children's and infants' at 7 percent.
- From 1970 to 1976 the number of establishments declined from 98 to 78 and employment dropped from approximately 7,000 to 5,500.
- Domestic shipments of sweaters decreased by 27 percent during 1975 to 1979, for an annual average decrease of 6.7 percent.


## SWEATERS, PULL-OVERS, CARDIGANS

## APPARENT CANADIAN MARKET

| $\underline{1976}$ | $\underline{1977} \quad \underline{1978}$ |
| :--- | :--- | :--- | :--- |
| $--\quad .000$ | garments --- |


| (1) | 26,732 | 23,425 | 19,322 | 20,518 | 19,566 |
| :--- | ---: | :--- | :--- | :--- | :--- |
| Domestic Shipments |  |  |  |  |  |
| Less Exports (1) | $\underline{194}$ | $\underline{192}$ | $\underline{192}$ | $\underline{151}$ | -174 |
| Net Domestic Shipments | 26,538 | 23,233 | 19,150 | 20,367 | 19,392 |
| Imports | $\underline{29,561}$ | $\underline{45,172}$ | $\underline{28,734}$ | $\underline{24,081}$ | $\underline{20,520}$ |
| Apparent Canadian Market | 56,099 | 68,405 | 47,884 | 44,448 | 39,912 |


| Share of Market held by | -.- percent --- |  |  |  |  |
| :--- | :--- | :--- | :--- | :--- | :--- |
| Net Domestic Shipments | 47 | 34 | 40 | 46 | 49 |
| Imports | 53 | 66 | 60 | 54 | 51 |

IMPORTS

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 | Restraint levels 1981 |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| RESTRAINED | --- '000 garments ---- |  |  |  |  |  |
| Taiwan | 7,311 | 9,930 | 6,584 | 6,904 | 5,229 | 7,437 |
| Korea, R. of | 8,448 | 15,003 | 9,041 | 6,523 | 4,966 | 9,239 |
| Hong Kong | 6,786 | 9,784 | 5,679 | 4,419 | 4,388 | 6,898 |
| China, P.R. of | 1,250 | 2,558 | 2,040 | 1,737 | 2,159 | 1,625(5) |
| Romania | 623 | 1,363 | 1,070 | 1,143 | 759 | 884 |
| Macao | 27 | 29 | 48 | 119 | 205 | 225 |
| Poland | 255 | 193 | 72 | 334 | 177 | 305 |
| Singapore | 16 | - | 6 | 20 | 163 | 200(3+7) |
| Philippines | 28 | 127 | 44 | 33 | 89 | 94 |
| Bulgaria | - | - | - | - | - | 169 |
| Total Restrained | 24,744 | 38,987 | 24,584 | 21,232 | 18,135 | 27,076(4+20) |

UNRESTRAINED LOW-COST

| Malaysia | 3 | 1 | 6 | 12 | 57 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Thailand | - | - | 1 | neg | 24 |
| Uruguay | 2 | 27 | 6 | 3 | 21 |
| Morocco | 68 | 185 | 105 | 66 | 16 |
| Hungary | - | - | 4 | 4 | 16 |
| Bolivia | 1 | 6 | 9 | 10 | 7 |
| Ecuador | neg | 1 | 4 | 3 | 5 |
| Mexico | 2 | 6 | 6 | 4 | 4 |
| Brazil | 7 | 3 | neg | neg | 2 |
| Peru | neg | neg | 1 | 2 | 2 |
| India | 6 | 13 | 5 | 13 | 1 |
| Malta | 8 | 9 | 6 | 7 | 1 |
| Venezuela | - | - | - | - | 1 |
| Pakistan | 1 | - | neg | 1 | neg |
| Cyprus | - | - | - | - | g |
| Turkey | neg | 3 | neg | - | neg |
| Korea, N. | - | 10 | 7 | - |  |
| Argentina | neg | 4 | 4 | - |  |
| Mauritius | - | - | 6 | - |  |
| El Salvador | - | 2 | - | - |  |
| Afghanistan | 1 | neg | - | - |  |
| Guatemala | neg | - | - | neg |  |
| Chile | neg | - | - | neg |  |
| Colombia | neg | neg | neg | - |  |
| Czechoslovakia | - | - | - | neg |  |
| Indonesia | - | - | neg | - | - |
| Total Unrestrained Low-Cost | 99 | 270 | 170 | 125 |  |
|  |  |  |  |  |  |

IMPORTS

SOURCE
DEVELOPED

| Italy | 1,798 | 2,379 | 1,310 | 879 | 812 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| United Kingdom | 1,126 | 1,258 | 1,146 | 709 | 357 |
| France | 368 | 736 | 405 | 257 | 288 |
| U.S.A. | 186 | 261 | 132 | 160 | 245 |
| Japan | 883 | 962 | 734 | 438 | 192 |
| Germany, West | 61 | 106 | 70 | 51 | 77 |
| Iceland | 2 | 12 | 9 | 29 | 33 |
| Sweden | 12 | 9 | 8 | 21 | 20 |
| Ireland | 17 | 9 | 15 | 25 | 16 |
| Finland | 1 | neg | neg | 1 | 8 |
| Norway | 5 | 15 | 4 | 4 | 5 |
| Denmark | 3 | 2 | 7 | 6 | 5 |
| Switzerland | 6 | 12 | 13 | 14 | 5 |
| Austria | 9 | 28 | 9 | 6 | 5 |
| New Zealand | 2 | 4 | neg | 3 | 5 |
| Netherlands | neg | 3 | 14 | 3 | 2 |
| Belgium | 2 | 1 | 1 | 2 | 1 |
| South Africa | neg | neg | 8 | - | neg |
| Australia | 5 | neg | neg | 4 | neg |
|  |  |  |  |  |  |
| Total Developed | 4,486 | 5,797 | 3,885 | 2,611 | 2,076 |

OTHER

| Israel | 63 | 80 | 78 | 77 | 60 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Greece | 12 | 7 | 6 | 5 | 49 |
| Portugal | 140 | 19 | 6 | 15 | 27 |
| Spain | 17 | 8 | 4 | 16 | 10 |
| Yugoslavia | - | - | neg | - | - |
| Total Other | 232 | 114 | 94 | 113 | 152 |
|  |  |  |  |  |  |
| TOTAL ALL SOURCES | 29,561 | 45,172 | 28,734 | 24,081 | 20,520 |

Totals may not add due to rounding.

## SWEATERS, PULL-OVERS, ÇARDIGANS - MEN'S, BOYS'

## APPARENT CANADIAN MARKET

## CONTROL NO, 50.1

1975

| 1976 | $\underline{1977} \quad \underline{1978}$ |
| ---: | :--- | ---: | :--- |
| $\ldots$ |  |


| Domestic Shipments (1) | 7,722 | 6,476 | 6,598 | 6,993 | 6,727 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Less Exports (1) | $-\quad 56$ | $\underline{53}$ | $\underline{59}$ | $\underline{51}$ | $\underline{60}$ |
| Net Domestic Shipments | 7,666 | 6,423 | 6,539 | 6,942 | 6,667 |
| Imports | $\underline{6,590}$ | $\underline{9,495}$ | $\underline{6,900}$ | $\underline{6,951}$ | $\underline{5,664}$ |
| Apparent Canadian Market | 14,256 | 15,918 | 13,439 | 13,899 | 12,331 |


| Share of Market held by | -.- percent --- |  |  |  |  |
| :--- | :--- | :--- | :--- | :--- | :--- |
| Net Domestic Shipments | 54 | 40 | 49 | 50 | 54 |
| Imports | 46 | 60 | 51 | 50 | 46 |

# SWEATERS, PULL-OVERS, CARDIGANS - MEN $^{\prime}$ S, BOYS 

## IMPORTS

CONTROL NO. 50.1

| SOURCE | $\underline{1975}$ |  | 1976 |  | $\underline{1977}$ | $\underline{1978}$ |
| :--- | ---: | ---: | ---: | ---: | ---: | ---: |

UNRESTRAINED LOW-COST

| Malaysia | - | - | - | 12 | 57 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Thailand | - | - | - | - | 24 |
| Hungary | - | - | 4 | neg | 11 |
| Uruguay | 1 | 1 | 3 | 1 | 8 |
| Bolivia | neg | 3 | 2 | 4 | 5 |
| Malta | neg | 6 | 6 | 6 | 1 |
| Peru | neg | - | neg | neg | 1 |
| Veneruela | - | - | - | - | 1 |
| Mexico | 1 | 4 | 2 | 2 | 1 |
| India | neg | - | 2 | 3 | neg |
| Brazil | 1 | 1 | neg | neg | neg |
| Ecuador | neg | neg | 1 | 2 | neg |
| Morocco | 2 | 14 | 17 | - | - |
| Afghanistan | 1 | - | - | - | - |
| Korea, North | - | 2 | 4 | - | - |
| Chile | - | - | - | neg | - |
| Colombia | - | neg | - | - | - |
| Argentina | - | - | 3 | - | - |

Total Unrestrained

| Low-Cost | 6 | 31 | 44 | 30 | 109 |
| :--- | :--- | :--- | :--- | :--- | :--- |

## SWEATERS, PULL-OVERS, ÇARDIGANS

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| DEVELOPED |  | --- '000 garments --- |  |  |  |
| Italy | 371 | 451 | 339 | 247 | 235 |
| United Kingdom | 411 | 466 | 485 | 414 | 200 |
| U.S.A. | 66 | 87 | 56 | 57 | 121 |
| France | 62 | 79 | 75 | 52 | 82 |
| Germany, West | 40 | 77 | 25 | 18 | 44 |
| Iceland | 1 | 4 | 4 | 11 | 16 |
| Ireland | 10 | 6 | 9 | 16 | 7 |
| Denmark | 1 | 2 | 6 | 2 | 4 |
| Japan | 13 | 44 | 58 | 4 | 3 |
| New Zealand | 1 | 4 | neg | 2 | 3 |
| Austria | 3 | 20 | 6 | 3 | 2 |
| Finland | - | - | - | - | 2 |
| Norway | 2 | 8 | 3 | 2 | 2 |
| Sweden | neg | - | - | 8 | 2 |
| Switzerland | neg | 2 | 4 | 5 | 2 |
| Belgium | 1 | 1 | 1 | neg | neg |
| Netherlands | - | - | - | neg | neg |
| Australia | 4 | neg | - | 4 | neg |
| South Africa | - | - | 8 | - | - |
| Total Developed | 986 | 1,251 | 1,079 | 845 | 725 |

## OTHER

| Israel | 42 | 13 | 38 | 45 | 42 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Portugal | 100 | 1 | neg | 14 | 23 |
| Greece | 4 | neg | 4 | neg | 12 |
| Yugoslavia | - | - | neg | - | 6 |
| Spain | 2 | -3 | $\underline{n e g}$ | -11 | -1 |
| Total Other | 148 | 17 | 42 | 70 | 84 |
|  |  |  |  |  |  |
| TOTAL ALL SOURCES | 6,590 | 9,495 | 6,900 | 6,957 | 5,664 |

Totals may not add due to rounding.

## SWEATERS, PULL-OVERS, CARDIGANS - WOMEN ${ }^{\prime} S$, GIRLS

APPARENT CANADIAN MARKET
CONTROL NO. 50.2

1975

| 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: |
|  | garmen |  |  |


| Domestic Shipments ${ }^{(1)}$ | 16,147 | 15,279 | 11,189 | 11,943 | 11,456 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Less Exports ${ }^{(1)}$ | 117 | 125 | 99 | 88 | 102 |
| Net Domestic Shipments | 16,030 | 15,154 | 11,090 | 11,855 | 11,354 |
| Imports | 20,434 | 32,078 | 19,281 | 14,463 | 12,672 |
| Apparent Canadian Market | 36,464 | 47,232 | 30,371 | 26,318 | 24,026 |


| Share of Market held by | --- percent --- |  |  |  |  |
| :--- | :--- | :--- | :--- | :--- | :--- |
| Net Domestic Shipments | 44 | 32 | 37 | 45 | 47 |
| Imports | 56 | 68 | 63 | 55 | 53 |

## IMPORTS

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| RESTRAINED |  | --- '000 garments ---- |  |  |  |
| Hong Kong | 5,936 | 8,364 | 4,958 | 3,624 | 3,582 |
| Korea, South | 5,767 | 11,053 | 6,798 | 4,046 | 3,497 |
| Taiwan | 4,466 | 6,554 | 4,183 | 4,190 | 3,300 |
| China, P.R. of | 483 | 944 | 374 | 434 | 600 |
| Romania | 266 | 584 | 231 | 353 | 215 |
| Singapore | 16 | - | 6 | 20 | 127 |
| Macao | 14 | 15 | 8 | 68 | 48 |
| Philippines | 19 | 65 | 4 | 8 | 28 |
| Poland | 147 | 127 | 58 | 89 | 10 |
| Bulgaria | - | - | - | - | - |
| Total Restrained | 17,114 | 27,706 | 16,620 | 12,832 | 11,407 |

## UNRESTRAINED LOW-COST

| Morocco | 67 | 139 | 75 | 66 | 16 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Uruguay | 1 | 26 | 3 | 2 | 13 |
| Hungary | - | - | - | 4 | 5 |
| Ecuador | neg | 1 | 3 | 1 | 3 |
| Bolivia | 1 | 3 | 6 | 3 | 2 |
| Mexico | 1 | 2 | 4 | 2 | 2 |
| India | 4 | 13 | 3 | 10 | 1 |
| Malaysia | 3 | 1 | 6 | - | 1 |
| Peru | neg | neg | 1 | neg | 1 |
| Cyprus | - | - | - | - | neg |
| Turkey | neg | 3 | neg | - | neg |
| Pakistan | neg | - | - | - | neg |
| Malta | 8 | 3 | neg | 1 | - |
| Czechoslovakia | - | - | - | neg | - |
| Mauritius | - | - | 6 | - | - |
| Afganistan | neg | $\mathrm{n} / \mathrm{a}$ | - | - | - |
| Indonesia | - | - | neg | - | - |
| Korea, North | - | 1 | 3 | - | - |
| Thailand | - | - | 1 | neg | - |
| Argentina | neg | 4 | neg | - | - |
| Brazil | 5 | 2 | neg | - | - |
| Chile | neg | - | - | - | - |
| Colombia | neg | - | neg | - | - |
| El Salvador |  | 2 | - | - | - |
| Guatemala | neg | - | - | neg | - |
| Other | - | - | - | - | neg |

Total Unrestrained Low-Cost

44

## SWEATERS, PULL-OVERS, CARDIGANS <br> WOMEN ${ }^{\prime}$ S, GIRLS

IMPORTS (Continued)
CONTROL NO.

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| DEVELOPED |  | --- '000 garments --- |  |  |  |
| Italy | 1,380 | 1,838 | 883 | 578 | 514 |
| France | 286 | 586 | 276 | 164 | 163 |
| United Kingdom | 695 | 759 | 651 | 284 | 146 |
| Japan | 619 | 696 | 547 | 299 | 145 |
| U.S.A. | 116 | 161 | 74 | 95 | 114 |
| Germany, West | 16 | 21 | 39 | 28 | 24 |
| Sweden | 12 | 9 | 8 | 12 | 18 |
| Iceland | 1 | 3 | 5 | 16 | 17 |
| Ireland | 7 | 3 | 5 | 9 | 9 |
| Finland | 1 | neg | neg | neg | 3 |
| Austria | 5 | 6 | 2 | 3 | 2 |
| Norway | 3 | 7 | 1 | 1 | 2 |
| Switzerland | 5 | 7 | 8 | 9 | 2 |
| Denmark | 2 | neg | 1 | 2 | 1 |
| Netherlands | - | neg | neg | neg | 1 |
| New Zealand | 1 | neg | - | 1 | 1 |
| Belgium | 1 | 1 | neg | 1 | neg |
| South Africa | neg | neg | - | - | neg |
| Australia | 1 | neg | neg | neg | neg |
| Total Developed | 3,151 | 4,097 | , 500 | ,502 | ,162 |

OTHER

| Greece | 4 | 3 | neg | 3 | 37 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Israel | 20 | 55 | 38 | 32 | 18 |
| Spain | 13 | 3 | 2 | 5 | 1 |
| Portugal | 37 | -17 | -6 | neg | 1 |
| Total Other | 74 | 78 | 46 | 40 | 57 |
|  |  |  |  |  |  |
| TOTAL ALI SOURCES | 20,434 | 32,078 | 19,281 | 14,463 | 12,672 |

Totals may not add due to rounding.

|  | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  | --- '000 garments --- |  |  |  |  |
| Domestic Shipments ${ }^{(1)}$ | 2,863 | 1,670 | 1,535 | 1,582 | 1,383 |
| Less Exports ${ }^{(1)}$ | 21 | 14 | 14 | 12 | 12 |
| Net Domestic Shipments | 2,842 | 1,656 | 1,521 | 1,570 | 1,371 |
| Imports | 2,536 | 3,599 | 2,553 | 2,661 | 2,184 |
| Apparent Canadian Market | 5,378 | 5,255 | 4,074 | 4,231 | 3,555 |


| Share of Market held by | --- percent --- |  |  |  |  |
| :--- | :---: | :---: | :---: | :---: | :---: |
| Net Domestic Shipments | 53 | 32 | 37 | 37 | 39 |
| Imports | 47 | 68 | 63 | 63 | 61 |

## IMPORTS

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| RESTRAINED |  | --- '000 garments ---- |  |  |  |
| China, P.R. of | 277 | 847 | 874 | 696 | 880 |
| Taiwan | 1,303 | 1,234 | 838 | 1,040 | 600 |
| Korea, R. of | 491 | 788 | 436 | 507 | 379 |
| Philippines | 9 | 47 | 31 | 26 | 60 |
| Hong Kong | 72 | 174 | 45 | 75 | 51 |
| Romania | 7 | - | neg | 23 | 11 |
| Macao | - | - | - | - |  |
| Poland | 18 | - | 5 | 22 |  |
| Bulgaria | - | - | - | - |  |
| Singapore | - | - | - | - |  |
| Total Restrained | 2,177 | 3,090 | 2,229 | 2,389 | ,982 |

UNRESTRAINED LOW-COST

| Brazil | 1 | - | - | - | 2 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Ecuador | - | - | neg | - | 1 |
| Mexico | - | - | - | - | 1 |
| Malta | - | - | - | - | neg |
| Bolivia | - | - | - | 3 | neg |
| Pakistan | neg | - | neg | 1 | - |
| Peru | - | - | - | 1 | - |
| Moroceo | - | 32 | 13 | - | - |
| Korea, North | - | 7 | - | - | - |
| Argentina | - | - | 1 | - | - |
| India | 2 | - | - | - | - |
| Hungary | - | - | - | neg | - |
| Afghanistan | - | neg | - | 二 | - |
| tal Unrestrained w-Cost | 3 | 39 | 14 | 5 | 4 |


| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| DEVELOPED |  | --- '000 garments --- |  |  |  |
| Italy | 47 | 91 | 88 | 53 | 64 |
| Japan | 251 | 222 | 128 | 135 | 44 |
| France | 20 | 72 | 54 | 40 | 44 |
| United Kingdom | 20 | 33 | 9 | 12 | 10 |
| U.S.A. | 4 | 12 | 3 | 8 | 9 |
| Germany, West | 4 | 8 | 6 | 6 | 9 |
| Finland | - | - | - | neg | 3 |
| Norway | neg | - | - | 1 | 2 |
| Switzerland | neg | 3 | 1 | neg | 1 |
| Ireland | neg | neg | neg | neg | 1 |
| Netherlands | neg | 3 | 14 | 3 | neg |
| Denmark | - | neg | neg | 2 | neg |
| Austria | 1 | 2 | 1 | neg | neg |
| Belgium | - | - | neg | neg | neg |
| Sweden | - | - | neg | neg | neg |
| Iceland | - | 5 | - | 1 |  |
| New Zealand |  | - | - | neg |  |
| Total Developed | 347 | 451 | 304 | 261 | 187 |

OTHER

| Spain | 1 | 2 | 2 | neg | 8 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Portugal | 2 | 1 | neg | neg | 3 |
| Israel | 1 | 11 | 1 | 1 | 1 |
| Greece | 4 | 5 | 2 | 2 | neg |
| Total Other | 8 | 19 | 5 | 3 | 12 |
| TOTAL ALL SOURCES | 2,536 | 3,599 | 2,553 | 2,661 | 2,184 |

Totals may not add due to rounding.

## DEFINITION

Work gloves include: l) work gloves wholly or mainly of textile fabrics, wholly or mainly by weight of cotton man-made fibres or blends thereof, whether or not impregnated or coated; 2) liners; 3) work gloves wholly or mainly by weight of leather. Work gloves are considered as gloves used in industry as well as around the home for building and gardening as opposed to dress gloves.

## SECTOR PROFILE

- Based on a survey for 1978 and 1979 by the Textile and Consumer Products Branch of the Department of Industry, Trade and Commerce, there are 27 producers of work gloves, five of which are foreign owned and account for 37 percent, by dollar value, of all domestically produced work gloves;
- Total employment in the sector in 1979 was l,624 production employees, an increase of 6 percent over the previous year;
- Regionally speaking, the industry is located primarily in Québec (44 percent) and Ontario (37 percent);
- Hourly earnings for production workers advanced 8.7 percent in 1979 to an overall average of $\$ 5.00$ per hour;
- Utilization of plant capacity improved to 78 percent in 1979 from 72 percent in 1978;
- Capital expenditures in 1979 were $\$ 666,000$, a decrease of $\$ 350,000$ from 1978; projected expenditures for 1980 were anticipated to be \$791,000;
- Larger work glove manufacturers often produce safety clothing and related products;
- Total sales of domestic producers were $\$ 52$ million in 1979 up by $\$ 11$ million from 1978.


Domestic Shipments ${ }^{(1)}$

| Cotton | 559 | 529 | 736 | 877 | 837 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Cotton/Leather Palm | 381 | 418 | 437 | 391 | 423 |
| Leather | 322 | 324 | 325 | 369 | 382 |
| PVC Coated | 457 | 524 | 564 | 541 | 599 |
| Other | 8 | 36 | 41 | 33 | 49 |
| Total Domestic Shipments | 1,727 | 1,831 | 2,103 | 2,211 | 2,290 |
| Less Exports ${ }^{(1)}$ | 228 | 142 | 176 | 165 | 141 |
| Net Domestic Shipments | 1,499 | 1,689 | 1,927 | 2,046 | 2,149 |
| Imports ${ }^{(2)}$ | 1,604 | 2,431 | 1,785 | 1,835 | 2,962 |
| Apparent Canadian Market | 3,103 | 4,120 | 3,712 | 3,881 | 5,111 |


| Share of Market held by | --- percent --- |  |  |  |  |
| :--- | :--- | :--- | :--- | :--- | :--- |
| Net Domestic Shipments | 48 | 41 | 52 | 53 | 42 |
| Imports | 52 | 59 | 48 | 47 | 58 |

## IMPORTS

CONTROL NO. 31

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 | $\begin{gathered} \text { Restraint } \\ \text { levels } \\ 1981 \end{gathered}$ |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: |
| RESTRAINED |  | --- '000 dozen pairs --- |  |  |  |  |
| Hong Kong | 1,002 | 1,107 | 889 | 1,209 | 1,365 | 1,133 |
| China, P. R. of | 235 | 802 | 479 | 351 | 747 | 750 |
| Macao | - | - | - | - | 166 | 159 |
| India | neg | - | 1 | 13 | 97 | 88 |
| Taiwan | 44 | 36 | 20 | 10 | 77 | 45 |
| Thailand | neg | - | 1 | 2 | 67 | 80 |
| Korea, R. of |  | 61 | 44 |  | 41 | 85 |
| Total Restrained | 1,357 | 2,006 | 1,434 | 1,611 | 2,560 | 2,340 |

UNRESTRA INED LOW-COST

| Malaysia | - | - | - | - | 79 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| Romania | 13 | 47 | 61 | 46 | 48 |
| Pakistan | 19 | 17 | 7 | 2 | 32 |
| Barbados | neg | - | - | - | 10 |
| Singapore | - | - | - | - | 6 |
| Sri Lanka | - | - | - | - | 5 |
| Philippines | neg | - | 1 | neg | neg |
| Brazil | neg | - | - | - | neg |
| Malta | neg | neg | - | neg | - |
| Bulgaria | - | - | 3 | - | - |
| Czechoslovekia | 1 | 2 | 1 | neg | - |
| Hungary | 67 | 76 | 6 | 3 | - |
| Korea, North | - | 2 | 4 | - | - |
| Mexico | - | - | - | neg | - |
| Uruguay | - | neg | $=$ | $=$ | $\because$ |
|  | 100 | 144 | 83 | 51 | 180 |


| IMPORTS (Continued) |  |  |  | COH | ROL NO |
| :---: | :---: | :---: | :---: | :---: | :---: |
| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| DEVELOPED |  | --- '000 dozen pairs --- |  |  |  |
| U.S.A. | 105 | 175 | 179 | 107 | 124 |
| Japan | 24 | 52 | 57 | 40 | 84 |
| France | 10 | 4 | 9 | 6 | 10 |
| Italy | 2 | 3 | 1 | 2 | 1 |
| United Kingdom | 4 | 43 | 19 | 4 | 1 |
| Germany, West | neg | 1 | 2 | neg | neg |
| Finland | - | - | - | - | neg |
| Ireland | - | neg | - | - |  |
| Austria | - | neg | - | 12 | - |
| Netherlands | neg | - | - | - | - |
| Sweden | neg | neg | neg | - | - |
| New Zealand | neg | - | - | _ـ | $\underline{-}$ |
| Total Developed | 145 | 278 | 267 | 171 | 220 |
| OTHER |  |  |  |  |  |
| Spain | neg | - | - | - | - |
| TOTAL ALL SOURCES | 1,604 | 2,431 | 1,785 | 1,835 | 2,962 |

Totals may not add due to rounding.

## DEFINITION

Handbags made of fabrics, whether uncoated, coated or bonded, containing natural or man-made fibres or blends of these fibres, with a body area, excluding handles, between 258 and 1,226 square centimetres, in the manufacture of which leather and plastic materials may be used as trim and finish but not a major component of the shell.

## SECTOR PROFILE

- The number of firms manufacturing these types of handbags in Canada is essentially the same as was reported by the Board in 1977, i.e., 33 firms.
- Approximately 90 percent of the firms continue to be located in Quebec and the remainder in Ontario.
- Employment in this sector is estimated to have increased by 8 percent in 1979 compared to 1978, and by more than 20 percent in 1979 when compared to 1977.
- The apparent Canadian market for handbags of all types grew by only 4 percent in 1979 over 1978 , but grew by almost 24 percent in 1979 when compared to 1977.
- Shipments of all types of handbags by Canadian manufactures are estimated to have increased by 20.7 percent in 1979 over 1978.
- Imports of all types of handbags declined slightly in 1979 from their 1978 level.


## APPARENT CANADIAN MARKET

|  | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
|  |  | --- '000 dozens --- |  |  |  |
| Domestic Shipments | 323 | 278 | 361 | 478 | 577 |
| Less Exports | 14 | 8 | 7 | 5 | 6 |
| Net Domestic Shipments | 309 | 270 | 354 | 473 | 571 |
| Imports | 518 | 853 | 795 | 888 | 849 |
| Apparent Canadian Market | 827 | 1,123 | 1,149 | 1,361 | 1,420 |
| Share of Market held by --- percent |  |  |  |  |  |
| Net Domestic Shipments | 37 | 24 | 31 | 35 | 40 |
| Imports | 63 | 76 | 69 | 65 | 60 |


| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| LOW-COST | --- '000 dozen --- |  |  |  |  |
| Korea, Rep. of | 165 | 317 | 222 | 287 | 242 |
| Hong Kong | 111 | 155 | 200 | 155 | 220 |
| Taiwan | 55 | 98 | 133 | 249 | 175 |
| Uruguay | neg | 4 | 4 | 19 | 126 |
| Philippines | 4 | 27 | 16 | 9 | 15 |
| India | 15 | 10 | 2 | 6 | 10 |
| Brazil | 23 | 18 | 8 | 8 | 6 |
| Dominican Republic | neg | 2 | 4 | 4 | 6 |
| Mexico | 24 | 18 | 8 | 5 | 3 |
| Hungary | 2 | 2 | 1 | 1 | 1 |
| Poland | neg | neg | neg | neg | 1 |
| Romania | neg | neg | neg | neg | 1 |
| Lebanon | 10 | 3 | 2 | 1 | 1 |
| China, P.R. | 4 | 56 | 38 | 1 | 1 |
| Argentina | neg | 3 | 4 | 4 | 1 |
| Colombia | 3 | 2 | 1 | 2 | 1 |
| Czechoslovakia | neg | neg | - | - | neg |
| Egyptian Arab Republic | neg | - | - | - | neg |
| Morocco | 5 | 2 | 2 | neg | neg |
| Pakistan | neg | neg | neg | - | neg |
| Singapore | 1 | 1 | 2 | - | neg |
| Afghanistan | neg | neg | neg | neg | neg |
| Thailand | - | neg | - | neg | neg |
| Bolivia | neg | neg | neg | neg | neg |
| Chile | neg | neg | - | - | neg |
| Ecuador | neg | neg | neg | neg | neg |
| Peru | neg | - | - | neg | neg |
| Guatemala | neg | neg | neg | neg | neg |
| Haiti | - 1 | 1 | 1 | neg | neg |
| Macao | - | - | - | neg | neg |
| Bulgaria | - | neg | - | neg | neg |
| Germany, East | - | neg | neg | - | - |
| Kenya | - | neg | neg | neg | - |
| Nigeria | neg | - | - | - | - |
| Commonwealth |  |  |  |  |  |
| Africa nes | - | neg | neg | - | - |
| Tunisia | - | neg |  | - | - |
| Bangladesh | neg | neg | - | neg | _ |
| Sri Lanka | neg | - | - | - | - |
| Korea, North | 1 | 2 | 1 | - | - |
| Guyana | neg | - | - | - | - |
| Jamaica | neg | - | - | - | - |
| Leeward \& Windward Islands | - | - | neg | - | _ |
| Trinidad and Tobago | neg | - | - | - |  |

IMPORTS (Continued)

| SOURCE | 1975 | 1976 | 1977 | 1978 | 1979 |
| :---: | :---: | :---: | :---: | :---: | :---: |
| LOW-CosT (Continued) |  |  | '000 dozen |  |  |
| Costa Rica | neg | neg | neg | - | - |
| Nicaragua | neg | - | - | - | - |
| Puerto Rico | - | - | 3 | 1 | - |
| Cyprus | - | neg | - | - | - |
| Sudan | neg | - | - | - | - |
| Syria | - | neg | neg | - | - |
| El Salvador | neg | - | - | - - | - |
| Total Low-Cost | 424 | 721 | 650 | 752 | 710 |

## DEVELOPED

| U.S.A. | 29 | 53 | 43 | 48 | 59 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Italy | 39 | 43 | 60 | 55 | 59 |
| France | 2 | 3 | 3 | 5 | 4 |
| Japan | 4 | 14 | 8 | 3 | 4 |
| United Kingdom | 8 | 7 | 7 | 5 | 3 |
| Belgium-Lux | - | neg | neg | neg | 1 |
| Denmark | neg | neg | neg | 1 | 1 |
| Germany, West | 1 | 1 | 1 | 14 | 1 |
| Netherlands | neg | neg | - | $n e g$ | $n$ |
| Finland | neg | neg | neg | 1 | neg |

OTHER

| Spain | 4 | 6 | 11 | 3 | 4 |
| :--- | ---: | ---: | ---: | ---: | ---: |
| Greece | 3 | 2 | 1 | 1 | 1 |
| Portugal | - | neg | neg | neg | neg |
| Yugoslavia | 1 | 1 | - | - | $n e g$ |
| Israel | neg | $n e g$ | $n e g$ | $n e g$ | $n$ |
| Total Other | 8 | 9 | 12 | 4 | 5 |
| TOTAL ALL SOURCES | 518 | 853 | 795 | 888 | 849 |

Totals may not add due to rounding

## NOTES TO TABLES

(1) Textile and Clothing Board.
(2) Textile and Consumer Products Branch, Department of Industry, Trade and Commerce estimates for 1975 to 1979.
(3) July 1 to June 30 .
(4) This is a summary of total restraint levels within this control category. Restraint levels relative to each subcategory are available from the Department of Industry, Trade and Commerce.
(5) Nominal figures, will be reduced by amount of carry forward provisions of revised agreement.
(6) Textile and Consumer Products Branch, Department of Industry, Trade and Commerce estimates for 1975 to 1979. 1975-78 overstated by amount for outdoor jackets winter weight which should be included in Control No. 32.1
(7) 1979 Export Authorization Level.
(8) Textile and Consumer Products Branch, Department of Industry, Trade and Commerce estimates for 1975 to 1977.
(9) Textile and Consumer Products Branch, Department of Industry, Trade and Commerce estimates for 1975.
(10) The restrained figure includes all imports under Control No. 46. Restrained-unrestrained breakdown is not available.
(ll) 1980 level unilaterally imposed.
(12) Textile and Consumer Products Branch, Department of Industry, Trade and Commerce, estimates for 1975 to 1979. 1975 to 1978 understated by amount of outdoor jackets, winter weight which are included in Control No. 46.1.
(13) Textile and Consumer Products Branch, Department of Industry, Trade and Commerce.
(14) Takes into account overshipments of structured suits in 1979.
(15) Blouses, Shirts, women's and girls' (Control No. 39.1) included in Control No. 49.2, Shirts With Full-Fashioned Collar.
(16) Blouses, shirts, T-shirts, Sweatshirts, children's and infants' included in children's and infants' apparel level N.E.S. and taken into account in import summary Table "Control Nos. 32,37 to 50".
(17) Pyjamas and Sleepwear, etc., children's and infants' (Control No. 40.3) included in children's and infants' apparel level N.E.S. and taken into account in import summary Table "Control No. 32-50".
(18) Underwear included in Control No. 43, Foundation Garments.
(19) Shirts With Full-Fahsioned Collar (Control No. 49.2) included in Control No. 39, Blouses and Shirts, women's and girls'.
(20) Includes children's and infants' apparel, N.E.S. category, not included in individual control numbers.


[^0]:    ${ }^{(1)}$ Indexed to retain confidentiality

[^1]:    Totals may not add due to rounding.

[^2]:    Totals may not add due to rounding.

