

Sporting Goods

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Canada

1990-1991

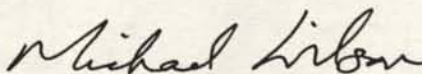
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In a rapidly changing global trade environment, the international competitiveness of Canadian industry is the key to growth and prosperity. Promoting improved performance by Canadian firms in the global marketplace is a central element of the mandates of Industry, Science and Technology Canada and International Trade Canada. This Industry Profile is one of a series of papers in which Industry, Science and Technology Canada assesses, in a summary form, the current competitiveness of Canada's industrial sectors, taking into account technological, human resource and other critical factors. Industry, Science and Technology Canada and International Trade Canada assess the most recent changes in access to markets, including the implications of the Canada-U.S. Free Trade Agreement. Industry participants were consulted in the preparation of the profiles.

Ensuring that Canada remains prosperous over the next decade and into the next century is a challenge that affects us all. These profiles are intended to be informative and to serve as a basis for discussion of industrial prospects, strategic directions and the need for new approaches. This 1990-1991 series represents an updating and revision of the series published in 1988-1989. The Government will continue to update the series on a regular basis.



Michael H. Wilson
Minister of Industry, Science and Technology
and Minister for International Trade

Structure and Performance**Structure**

The sporting goods industry comprises establishments primarily engaged in the manufacturing of a broad range of consumer goods for individual and group recreational and fitness activities.

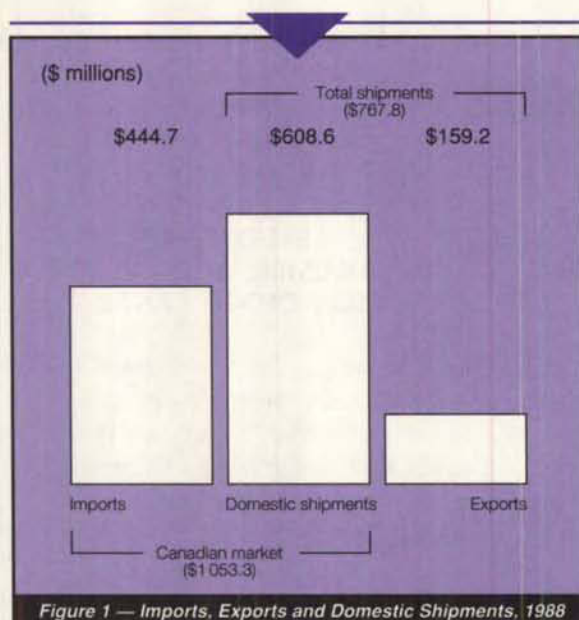
Production in Canada can be roughly divided according to seasonal sporting activities for which the products are produced: summer, winter and all seasons. Summer sports equipment (baseball, football, golf, fishing and cycling equipment as well as swimming pools) represents about 49 percent of domestic manufacturers' shipments, while winter sports equipment (skates, hockey gear, snowshoes, snowboards and skis) accounts for about 28 percent, and all-season equipment

(fitness, gym and play structures as well as table sports equipment) takes about 13 percent; miscellaneous products make up the remaining 10 percent. Bicycles, swimming pools and golf products account for almost 90 percent of summer sports equipment shipments. Ice skates and hockey equipment account for 80 percent of winter sports equipment shipments. Exercise, gym and playground equipment represent about 85 percent of all-season sports equipment shipments. In the other product lines, the industry lacks depth or is quite small.¹

The Canadian sporting goods industry, like the industry worldwide, is labour intensive. In 1988, the industry consisted of an estimated 255 establishments employing 9 036 people and producing total shipments worth \$767.8 million (Figure 1).

The industry is concentrated both by ownership and by region. Firms employing more than 100 people represent 10 percent of establishments, 57 percent of employment and

¹Excluded from this industry profile are such items as camping equipment, sporting firearms and ammunition, sport tape, skate sharpeners, athletic footwear and jerseys.



58 percent of shipments, whereas firms employing fewer than 20 people account for 67 percent of establishments, 14 percent of employment and about 11 percent of shipments, and generally specialize in a narrow product range. The industry is largely Canadian-controlled and has a high degree of private ownership. Of the six largest manufacturers, four are Canadian-owned, while Finnish and British interests control the remaining two firms. These six firms are located in Ontario and Quebec and account for almost 40 percent of employment and shipments. Two of these manufacturers concentrate on bicycle production, while the other four are primarily involved in the production of skating and ice hockey equipment.

Worldwide sporting goods production is characterized by a high degree of country-specific product identification and manufacturing specialization. For example, Finland is noted for cross-country ski manufacturing, Austria and France for alpine skis, the United States for golf, and Canada for skating and ice hockey equipment. In some segments, there continues to be strong brand-name identification associated with a country, although actual production has shifted to low-wage countries. For example, baseball is closely identified with the United States; however, most of the baseball gloves are produced in the Far East.

Imports of sporting goods equipment and parts, worth \$444.7 million in 1988, represented about 42 percent of the domestic market, with parts representing approximately one-third of these imports. However, most of the parts imports were destined for final assembly into products manufactured

in Canada. Taiwan was a major source of exercise equipment parts, while bicycle manufacturers were dependent on parts from both Taiwan and Japan. Golf and fishing equipment manufacturers sourced most of their required parts from the United States. Snow ski equipment, golf equipment and parts as well as bicycles and parts represented over one-half of total imports. These basic patterns have continued.

About a fifth of the industry's shipments, worth \$159.2 million, were exported in 1988. The major items exported were primarily finished products such as skating and ice hockey equipment, swimming pools, bicycles, and exercise and gymnasium equipment. Parts represented less than 20 percent of these exports. The United States absorbed 72 percent of Canada's exports in 1988, followed by Western Europe with 20 percent, of which the European Community (EC) represented 14 percent.

Skating and ice hockey products, accounting for 32 percent of total exports, are most closely associated internationally with the Canadian industry. The major market for skating and ice hockey products is the United States, followed by Western Europe. Exercise, gymnasium and playground products, representing 15 to 20 percent of exports, are sold worldwide. Bicycles and parts, representing over 10 percent of exports, went mostly to the United States in 1988, but early indications for 1989 are that bicycle exports will shift dramatically from the United States to Western Europe as Canadian producers take advantage of the emerging consumer popularity of mountain-type bicycles in Europe. Swimming pools and accessories, which account for roughly \$20 million to \$25 million in exports, are shipped almost exclusively to the northern United States.

Performance

As in the consumer product sector generally, sales of sporting goods are extremely sensitive to changes in economic conditions, interest rates, personal disposable incomes, exchange rates and lifestyles. During the 1970s, the industry, led by the skating and ice hockey subsector, enjoyed a period of steady growth in both the domestic and export markets. However, in the early 1980s, there was a significant slowdown in both markets, which can be attributed primarily to the 1981–1982 recession and its after-effects. Other factors limiting industry growth were lifestyle changes, increased competition in the European market for skating and hockey equipment from countries such as Finland, Czechoslovakia and Taiwan as well as saturation of the Canadian market for several key products such as ice sports equipment. Since 1983, in response to improved domestic and international market conditions, the industry has resumed a steady growth pattern, with shipments

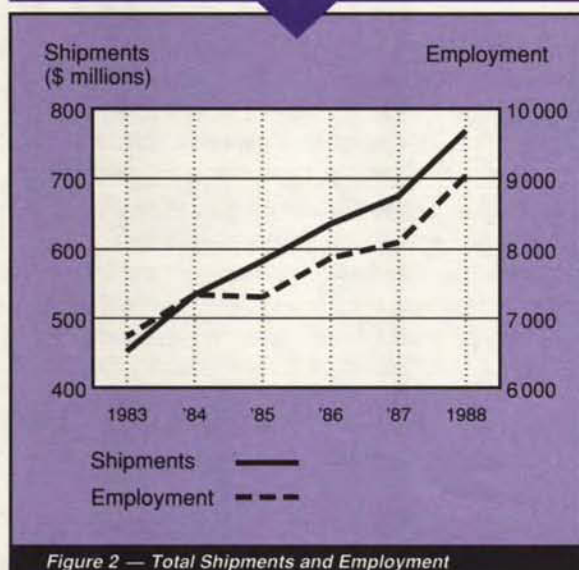


Figure 2 — Total Shipments and Employment

increasing by an average of slightly over 10 percent per year between 1983 and 1988 in current dollars, or about 5 percent real growth per year (Figure 2). Growth during this period would undoubtedly have been greater except for the emergence of Taiwan as a major factor in world trade of sporting goods, which has strongly affected Canada and other developed countries.

The popularity of activities such as skiing, soccer, golf, exercising and fitness training has grown in recent years. Canadian supply capability for these activities is either limited or highly dependent on imported parts and components. Nonetheless, the import share of the Canadian market has gradually declined from 56 percent in 1973 to 42 percent in 1988. The major change in the sourcing of imports to Canada during the 1980s has been the shift from the United States to the Far East, primarily Taiwan.

The export share of shipments, which fell in the late 1970s and early 1980s, has now appeared to have stabilized around 20 percent. This earlier decline in export share was most notable in skates and hockey equipment. From 1982 to 1985, although exports such as exercise equipment and swimming pools increased, exports of products such as skates and hockey equipment were hurt by maturing markets, exchange rates and competitive pressures from Taiwan, Czechoslovakia and Finland. However, since 1986, exports as a percentage of shipments have increased, as the product range exported to the United States has expanded and the skate and hockey equipment segment has regained market share in Western Europe. This growth in Western Europe was

also influenced by a favourable currency exchange rate, increased bicycle exports and an increasing preference on the part of the European consumer for better-quality skating and hockey equipment, products for which Canada is a leading supplier. The EC market represents the majority of exports to Western Europe. In the United States, Canadian export penetration has been slower, as Taiwan continues to increase its market share in the low end of the skating and hockey equipment segment.

To maintain their market position in the face of aggressive competition in Europe from domestic companies in areas such as skates and hockey equipment, some Canadian firms have initiated joint ventures or licensing arrangements and have established overseas subsidiaries. Other measures include transferring final assembly and/or packaging of Canadian products to European distributors and shipping Canadian-branded products directly from Far East contractors to Europe in order to compete with both East European and Far East brands.

Strengths and Weaknesses

Structural Factors

The structural factors affecting the competitiveness of this industry include scale of operations, access to financial resources, brand-name recognition, wage costs and technological advances. The industry includes six large, vertically integrated companies that are internationally competitive in the manufacturing and distribution of sports equipment; they suffer no serious disadvantages because of economies of scale. These firms are the industry leaders in research and development (R&D) projects designed to maintain international competitiveness. In addition, a number of medium-sized and smaller companies have established an international reputation by specializing in one product area and/or by serving a particular market niche in an effective manner. For the most part, the sector consists of privately owned and family-operated establishments, usually constrained by limited financial resources. These companies are also vulnerable to seasonal and market trends. In addition, as in most small business sectors, many of them have limited management, administration and marketing resources.

An important factor affecting the ability of the industry to compete is consumer demand for brand-name products. In some segments, Canadian brands such as Bauer, Cooper and CCM (hockey and ice skates) are well known and recognized internationally. However, other Canadian companies have had difficulty in making their names widely known. This lack of



brand-name recognition is a serious impediment among the small and medium-sized firms of the industry.

Despite substantial efforts to reduce labour content, Canadian sporting goods manufacturing remains relatively labour intensive. This makes it vulnerable to competition from the newly industrialized countries (NICs) and less developed countries (LDCs). To alleviate some of this pressure, Canadian firms have moved the production and sourcing of many labour-intensive, low-cost items to offshore suppliers. Nevertheless, the Canadian industry still remains at a cost disadvantage relative to manufacturing operations in low-wage countries.

In recent years, premium costs for product liability insurance have increased rapidly in the sporting goods industry. This increase affects Canadian firms more than offshore producers because much of Canada's manufacturing activity is in fitness, gymnastic and hockey protective equipment, for which product liability insurance premiums are more costly.

Trade-Related Factors

Canadian tariff rates on finished sporting goods range between 4 percent and 23 percent and generally are significantly higher than comparable U.S. and EC tariffs. An estimated one-third of product and parts imports enter duty-free under the Most Favoured Nation or General Preferential Tariff rates, with parts and accessories representing the major portion of these imports.

Comparison of 1988 MFN Tariff Rates (%)

FTA category	Canada	United States	European Community	Dates for tariff elimination under FTA
Bicycles	14.7	11.0	17.0	1998
• parts	10.2–11.3 ^a	4.9–10.0	8.0	1998
Exercise equipment	10.0	4.6	6.0	1998
Golf clubs	12.1	4.9	6.0	1998
• parts	4.0–11.3 ^a	4.9	6.0	1998
Hockey sticks	4.0	0.0	6.0	1998
Ice skates	22.5	5.8	6.0	1989
Skis				
• cross-country	11.4	3.5	6.0	1989
• alpine	11.4	5.1	6.0	1989

^aIncludes a substantial portion of products used in the manufacturing process that are allowed duty-free entry under Canadian custom duties regulations.

With some exceptions, the Canada-U.S. Free Trade Agreement (FTA) will remove tariffs between Canada and the United States in 10 annual, equal steps and will introduce new rules of origin (see accompanying table). Under the provisions of the FTA, effective 1 January 1989, tariffs on skis, ski bindings and skates were reduced to zero. Sailboard tariffs are to be phased out in five annual steps. The importation of duty-free parts and components has helped to keep costs in check for Canadian bicycle, golf equipment and fishing tackle manufacturers, many of whom are heavily engaged in assembly operations. However, under the FTA, the effects of eliminating the duty drawback effective 1 January 1994 on parts or components imported from third countries for products eventually exported to the United States could be avoided if some alternative North American sources can be found for these items.

The rules of origin under the FTA relating to sporting goods will allow goods incorporating offshore raw materials or components to qualify for duty reductions as long as they have been sufficiently transformed in Canada or the United States to warrant a different tariff classification. Also, the final product must include 50 percent Canadian and/or United States manufacturing cost. For example, a bicycle using Canadian steel for its frame and assembled in Canada using imported wheels and gears would qualify as a Canadian product only if 50 percent of its manufacturing cost is accounted for in Canada and/or the United States.

The introduction of the Harmonized System (HS) of tariff classification by Canada in 1988 and by the United States in 1989 resulted in a substantial rise in the duty rates for some products. Many of these products were in the export-oriented hockey segment. Discussions between U.S. and Canadian trade officials resulted in an agreement that these anomalies would be addressed within the context of the FTA. As a result, effective 1 April 1990, the duty rates on hockey visors, hockey gloves, snowshoes, and certain fishing reels were bilaterally reduced to zero. Rates on hockey helmets were unilaterally reduced by the United States to zero. Effective 1 July 1990, rates on most hockey pants were bilaterally reduced to zero and Canada agreed to accelerate tariff reductions on hockey shin guards and shoulder pads from 10 years to eight years.

There are no significant non-tariff barriers affecting Canada's trade in sporting goods.

Technological Factors

The technologies and processes utilized by sporting goods manufacturers cover a wide spectrum. The major processes include steel fabricating (playground and exercise equipment), plastic and fibreglass moulding (skis, sticks, skates), woodworking (sticks, bats) and cut-and-sew



operations (protective equipment). For sporting goods such as bicycles and golf products, production in Canada consists mainly of assembly operations. Noteworthy advances in the use of composites and advanced industrial materials have occurred within the past decade, and the sporting goods industry is now considered one of the leading sectors in the utilization of composites. The increased use of laminates, resins and improved textile materials is producing better and more durable sports equipment. Graphite, boron, ceramics and various composites are being introduced in a wide range of products.

The Canadian industry is a major user of new technology and composites. It has introduced more efficient production methods and has developed new market niches as well as innovative new materials for skating and hockey equipment, swimming pools and fitness equipment. The larger firms producing this equipment have kept pace with their counterparts elsewhere in the world in modernizing their facilities and upgrading their products.

From 1973 to 1988, most major innovative features introduced in skating and hockey equipment, except for the Finnish multi-ply hockey stick, originated with the Canadian industry. The Canadian industry has been in the forefront of product innovation and technological improvement with the introduction of the hockey helmet, moulded skates, stainless steel and titanium-plated skate blades, and improved protective equipment.

In addition, investment has been made to improve current products by developing new technology and adapting existing technology from chemical as well as resource-processing industries. A number of larger and medium-sized companies have embarked on co-operative programs that involve research staff and facilities of universities and colleges in conjunction with downstream suppliers such as Ciba-Geigy, Alcan, Du Pont, etc. to develop and evaluate the performance characteristics of new technologies and materials. Several companies have instituted sophisticated inventory and cost-control systems to improve plant efficiency. However, among the small and medium-sized firms in the industry not characterized by brand-name recognition, there is a tendency to lag behind in the use of new technologies and materials and to duplicate competitors' technology.

Other Factors

There is an increasing emphasis on the safety aspect of many sporting goods products. Performance and safety standards for a wide range of items have been developed within the past decade and adopted by most countries, often at the instigation of sport associations. This attention to

product safety and performance standards is growing and Canadian firms must have the awareness and capability to develop products and materials to meet these often stringent standards if they are to maintain competitiveness.

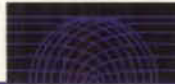
The decline in exports to Western Europe from 1981 to 1985 was influenced by the Canadian companies' tardiness in adjusting to increased competition in the ice sports segment and by a less favourable exchange rate. Recent export increases to Europe have been the result of several factors, including consumer demand for higher quality, a favourable exchange rate, and strategy changes by Canadian companies such as changes in product definition and mix to better meet European consumer preferences and the development of more selective distribution systems. Under the FTA, the tariff reductions are causing some companies to look closer at North America rather than the Far East for product and component sourcing.

The increased international competition in the European market during the 1980s and a growing awareness of the impact of the FTA are encouraging the larger companies to expand and formalize their R&D functions and to establish working alliances with research groups to develop new materials and technologies.

Between late 1987 and 1990, the international sporting goods industry underwent significant rationalization. Such well-known companies as Wilson, Donnay, Nordica, Adidas, Puma, MacGregor, Head, Prince, K2, Olin, Woodstream, Kneissl, and Cooper have changed ownership or have been taken over during this period. These changes have often brought a greater degree of financial stability and marketing acumen to the companies involved, as certain divisions and products were either discontinued or sold off while better-fitting complementary products were added. These changes are expected to raise the level of competition and to put increased pressure on Canadian manufacturers to react similarly or to concentrate more on the niche and specialty markets.

Evolving Environment

Several major forces will influence the future direction of the Canadian industry. The continuing emphasis on personal fitness and family recreational activities is expected to sustain growth and popularity in these activities at the expense of growth in competitive individual and team sports. Although there continues to be substantial gender differences in participation levels depending on the activity's intensity (e.g., walking versus jogging), there has been a virtual disappearance of such differences in time spent on physical activities



during leisure hours.² More female participation has helped to increase overall participation in many recreational and sporting activities and to popularize newer activities, resulting in an increased demand for existing and new equipment.

As the "baby boomers" age, this group, representing about one-third of the population, is showing a preference for recreational individual and team activities, rather than competitive team sports, with emphasis on individual fitness. This group has also brought about an increased awareness of improved protection for themselves and their families, leading to a more acute concern with purchasing better-quality, more durable equipment. The rapid market growth of sports medicine and performance aids products is one result of this trend.

The rise in product liability insurance premiums in the face of a number of sports-related lawsuits in North America has resulted in pressure to increase the prices of sporting goods. A continuation of the trend may adversely affect demand for these products in the future. Also, although the domestic market for sporting goods is expected to continue to grow, it will be negatively affected in the short term by the recent slowdown in economic activity in Canada.

In all its major international markets, the Canadian industry can expect greater competition in skating and hockey equipment from Finland, Czechoslovakia and the Far East. In addition, a number of the Canadian target markets are mature, where the appeal of winter sporting goods may be limited by a warm climate or a shortage of rink facilities.

The recent geopolitical changes in Europe will have a definite effect on the Canadian industry. The development of market economies in Eastern Europe are expected to create additional opportunities for skating and exercise equipment products, which are already popular in these countries.

Since Western Europe continues to be a prime market for the industry, major exporters are preparing for the economic integration of Europe after 1992 in several ways. More companies are establishing wholly owned subsidiaries in the EC while others are either aligning with Community-wide wholesalers or developing licensing arrangements. Medium-sized and smaller companies with export potential are showing increased interest in identifying contacts that will optimize opportunities arising when the European economies are integrated. While the potential impact of the current round of multilateral trade negotiations is difficult to assess, the industry generally perceives increased possibilities in Europe and other developed areas but has expressed great concern about competition from such Far East countries as Taiwan, the Republic of Korea, Malaysia and the Philippines.

Under the FTA, the United States will continue to be the dominant export market for Canadian sporting goods. However, there may be some rationalization of production that will alter the trade flows of sporting goods between the two countries. The large, export-oriented skating and hockey segment could benefit the most from the FTA. The benefits of immediately eliminating tariffs on skis and ski bindings are more difficult to assess, although in the short term the two Canadian producers of cross-country skis and the major U.S. producer of alpine skis should benefit. In other segments, those companies whose products are scheduled for phased tariff reductions over five or ten annual, equal steps will be required to adjust. For instance, it is expected that major adjustments may be required for several segments oriented towards assembly and summer sports equipment. These firms are characterized by a high degree of foreign ownership and have relied heavily on the protection afforded by Canadian tariffs.

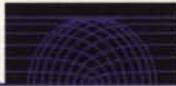
Competitiveness Assessment

The sporting goods industry in Canada is not cost-competitive with its counterparts in low-wage countries, to which some sporting goods production has shifted, and it is not likely to become so in the foreseeable future. This is especially the case with goods for which no brand-name recognition has been established. However, for winter sports equipment, the industry is competitive in terms of price and quality and has the advantage of brand-name recognition in many product lines. In addition, a number of smaller companies have established market niches in specialized items such as sports medicine products, skate blades, ski locks, stick shafts and others.

Recent rationalization activities at the international level have led larger companies in other countries to review their product offerings and to add or delete complementary products, depending on the business strategy they wish to pursue. Several of these major companies are examining opportunities in segments where the Canadian industry historically has been a significant force. To maintain or improve their present position, Canadian companies may find it necessary to develop new means of countering the effects of these moves by their international competitors by adopting similar strategies or by becoming more aggressive in developing and maintaining niche or specialty markets.

Under a more liberalized Canada-U.S. trade regime, a number of Canadian companies, for which brand-name

²T. Stephens and C.L. Craig, *The Well Being of Canadians: Highlights of the 1988 Campbell's Survey* (Ottawa: Canadian Fitness and Lifestyle Research Institute, 1990), pages 7-8.



recognition and market niches are important, will become competitive in the U.S. market. This is true for skating and ice hockey equipment, swimming pools, and gymnasium, fitness and playground equipment. Certain segments such as bicycles may be required to make significant investment decisions in order to introduce enough North American content into their products if they wish to take advantage of tariff reductions under the FTA rules of origin. Characteristics such as foreign ownership, assembly orientation and small scale of operation of some sporting goods segments such as golf and fishing tackle may limit their incentive to become as competitive in the U.S. market. Nevertheless, the overall industry should have the capability to maintain its competitiveness in the North American market within the FTA context.

For further information concerning the subject matter contained in this profile or in the ISTC sectoral study (see page 10), contact

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PRINCIPAL STATISTICS^a

	1973	1983	1984	1985	1986	1987	1988
Establishments	146	177	202	207	221	209	255
Employment	7 486	6 734	7 341	7 308	7 874	8 098	9 036
Shipments (\$ millions)	139.2	452.5	534.3	582.9	635.6	674.7	767.8
GDP ^b (constant 1981 \$ millions)	N/A	434.1	507.3	506.2	521.4	526.5	534.0

^aSee *Other Manufacturing Industries*, Statistics Canada Catalogue No. 47-250, annual (SIC 3931, sporting goods industry).

^bSee *Gross Domestic Product by Industry*, Statistics Canada Catalogue No. 15-001, monthly.

N/A: not available

TRADE STATISTICS^a

	1973	1983	1984	1985	1986	1987	1988 ^b
Exports (\$ millions)	36.2	82.0	101.3	101.2	116.3	131.4	159.2
Domestic shipments (\$ millions)	103.0	370.5	433.0	481.7	519.3	543.3	608.6
Imports (\$ millions)	129.3	298.4	344.5	373.8	436.4	471.9	444.7
Canadian market (\$ millions)	232.3	668.9	777.5	855.5	955.7	1 015.2	1 053.3
Exports (% of shipments)	26	18	19	17	18	19	21
Imports (% of Canadian market)	56	45	44	44	46	46	42

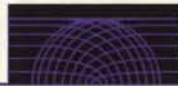
^aSee *Imports by Commodity*, Statistics Canada Catalogue No. 65-007, monthly; and *Exports by Commodity*, Statistics Canada Catalogue No. 65-004, monthly.

^bIt is important to note the 1988 data are based on the Harmonized Commodity Description and Coding System (HS). Prior to 1988, the shipments, exports and imports data were classified using the Industrial Commodity Classification (ICC), the Export Commodity Classification (XCC) and the Canadian International Trade Classification (CITC), respectively. Although the data are shown as a continuous historical series, users are reminded that HS and previous classifications are not fully compatible. Therefore, changes in the 1988 levels reflect not only changes in shipment, export and import trends, but also changes in the classification systems. It is impossible to assess with any degree of precision the respective contribution of each of these two factors to the total reported changes in 1988 levels.

SOURCES OF IMPORTS^a (% of total value)

	1983	1984	1985	1986	1987	1988
United States	36	31	32	27	29	29
European Community	13	15	17	17	16	14
Asia	40	42	39	45	45	47
Other	11	12	12	11	10	10

^aSee *Imports by Commodity*, Statistics Canada Catalogue No. 65-007, monthly.



DESTINATIONS OF EXPORTS^a (% of total value)

	1983	1984	1985	1986	1987	1988
United States	71	77	78	78	71	72
European Community	12	8	9	9	13	14
Asia	5	5	5	5	6	5
Other	12	10	8	8	10	9

^aSee *Exports by Commodity*, Statistics Canada Catalogue No. 65-004, monthly.

REGIONAL DISTRIBUTION (average over the period 1986 to 1988)

	Atlantic	Quebec	Ontario	Prairies	British Columbia
Establishments (% of total)	1	29	45	9	16
Employment (% of total)	X	42	52	X	4
Shipments (% of total)	X	43	52	X	3

X: confidential

MAJOR FIRMS

Name	Country of ownership	Location of major plants
Canstar Sports Group Inc.	Canada	Cambridge, Ontario Montebelluna, Italy Roxton Pond, Quebec Saint-Jérôme, Quebec
Cooper Canada Ltd. ^a	Canada	Cambridge, Ontario Toronto, Ontario
Karhu Canada Inc.	Finland	Cowansville, Quebec Saint-Jean-sur-Richelieu, Quebec
Procycle Inc.	Canada	Saint-Georges-de-Beauce, Quebec
Raleigh Industries of Canada Limited	United Kingdom	Waterloo, Quebec
Sport Maska Inc.	Canada	Saint-Hyacinthe, Quebec Saint-Jean-sur-Richelieu, Quebec

^aIn early 1990, the hockey-related assets, including inventory, of Cooper Canada Ltd. were sold to Canstar Sports Group Inc., while the baseball and other recreational products inventory was sold to Irwin Sport, a division of Irwin Toy Ltd.



INDUSTRY ASSOCIATIONS

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Canadian Sporting Goods Association
Suite 510, 455 Saint-Antoine Street West
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Tel.: (514) 393-1132
Fax: (514) 393-9513

National Ski Industries Association
Suite 340, 8250 Decarie Boulevard
MONTREAL, Quebec
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Tel.: (514) 737-1672
Fax: (514) 737-0724

SECTORAL STUDIES AND INITIATIVES

The following publication is available from the nearest
Business Service Centre (see inside front cover).

Statistical Overview of the Canadian Sporting Goods Market

This document provides 1987 statistics about the apparent
Canadian market in sporting goods by major product lines
and examines factors impacting on this market.

Printed on paper containing recycled fibres.

