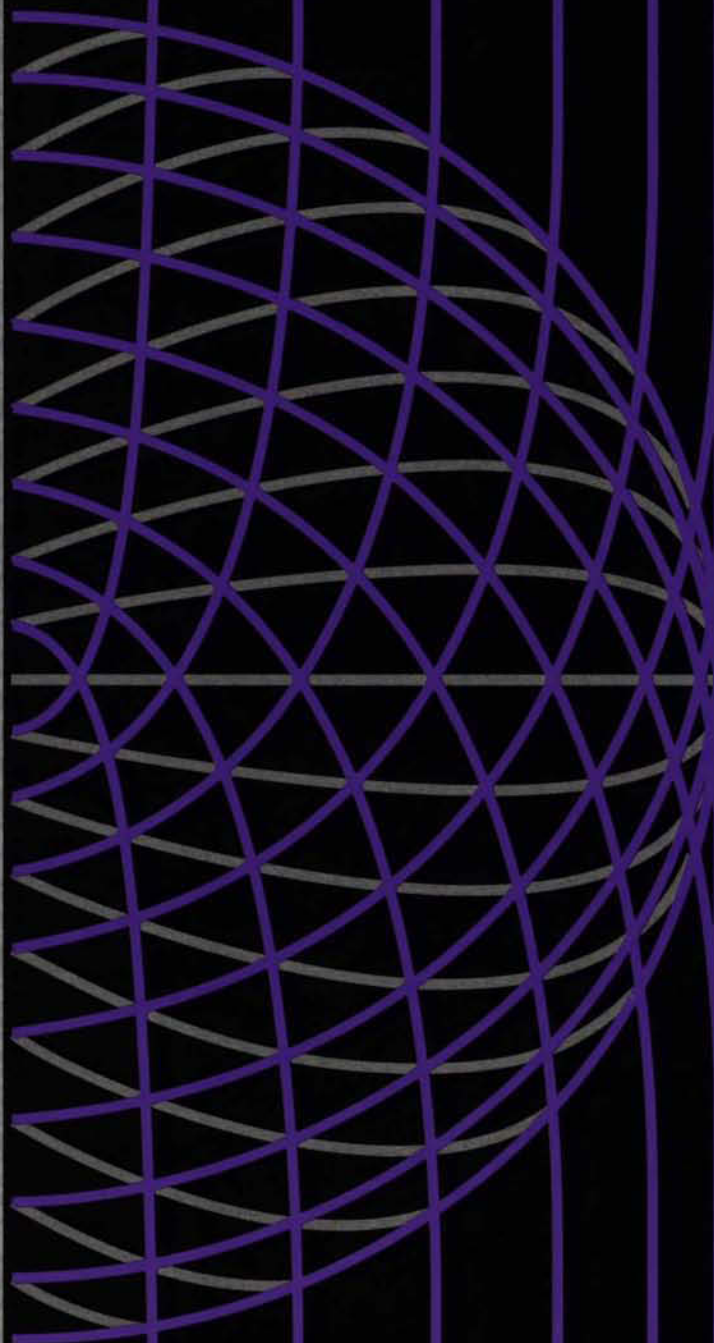


# Signs and Displays

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**Canada**



1990-1991

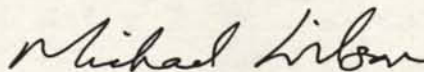
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TECHNOLOGIE CANADA**FOREWORD**

*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 signs and displays industry produces a broad range of identification sign and display products, including electric and neon signs; embossed, painted and stamped signs; electronic displays; mannequins; display forms; advertising displays and novelties; decals; display stands and non-furniture fixtures; decorative window cutouts and displays; and point-of-purchase displays.

Signs generally consist of lettered board or other display material. They may be used to identify or advertise a place of business or convey other business information or to post a command, warning or direction. A display is a device that gives information in visual form for the purpose of communication — an eye-catching arrangement by which something is exhibited.

Materials used in the manufacture of signs include glass tubing, vinyl, rigid plastic sheets, paperboard and sheet metals. The display industry uses some of the same materials, as well as textile fabrics, foam board, metal tubing, wood and mirrored glass.

Clients for sign and display products come from all areas of the institutional, retail and service trades. The government is a major client of this industry, purchasing 30 percent of its total output. The display subsector primarily serves the retail trade and, consequently, depends more on consumer spending patterns than the sign subsector does.

In 1988, the Canadian signs and displays industry comprised 664 manufacturing establishments, employed 9 869 permanent workers, and reported factory shipments of \$606.1 million (Figure 1). The sign subsector is the larger of the two, accounting for approximately 55 percent of the industry's establishments.



The principal product lines include electric and neon signs (representing about 30 percent of the industry's shipments), non-electric signs (15 percent), exhibition booths and advertising displays (30 percent) and poster billboards (10 percent). The remaining 15 percent consists of a miscellaneous range of products, including wine display racks, mannequins, name plates and bulletin boards. Display products tend to require more creativity and innovation than signs do.

The signs and displays industry employs skilled and unskilled workers in all regions of the country. Ontario dominates the sector nationally, accounting for 43.6 percent of establishments and 53.4 percent of the sector's employment. This sector is also represented in Quebec, which has 23.4 percent of the sector's employment; the Prairies, which have 12.1 percent; British Columbia, which has 7.4 percent; and the Atlantic region, which has 3.7 percent.

The industry is characterized by a large number of small establishments. This characteristic is true in other countries as well, since the industry worldwide has evolved in order to meet local market demand. Almost 80 percent of all Canadian plants have fewer than 20 employees, yet these plants account for only 29.3 percent of Canada's total production. Only 2 percent of establishments employ over 100 employees. They account for almost 14 percent of both production and the sector's labour force. These companies tend to produce specialized products and are generally more export oriented than the smaller manufacturers. Intermediate-sized companies (those employing 20 to 99 workers) account for almost 56 percent of production and labour force.

Even the larger sign producers owe their relative strength in the industry not to one large, highly productive facility, but to the output from several small and medium-sized plants located across Canada, each of which provides customized, client-oriented service to a local market area. There is a significant custom-design component to the display subsector, although display manufacturers tend to serve a broader regional market area than do sign companies, often crossing provincial borders. Consequently, proximity to major market centres has been a prime determinant in selecting plant location.

The signs and displays sector utilizes many technologies and processes, including screen printing, electrical fabricating, embossing, engraving and painting, metal stamping and fabricating, plastic and fibreglass fabricating and moulding, woodworking, cutting and sewing operations and foam cutting. Most facilities are involved in several of these processes, subcontracting to other branches of the industry when more specialized technologies are required.

The signs and displays industry is predominantly domestically controlled. More than 97 percent of the

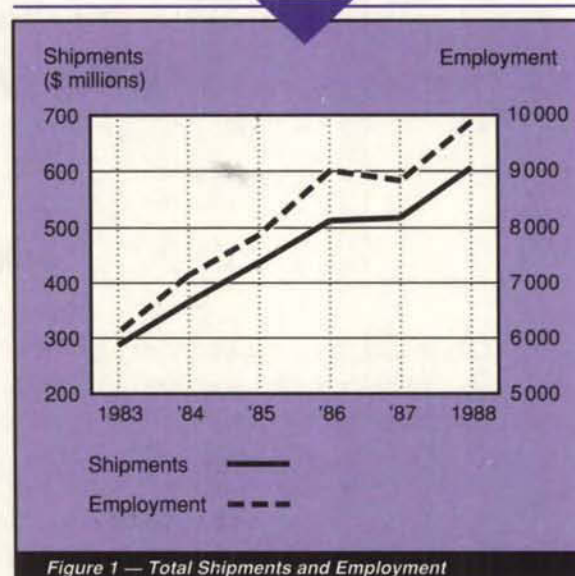


Figure 1 — Total Shipments and Employment

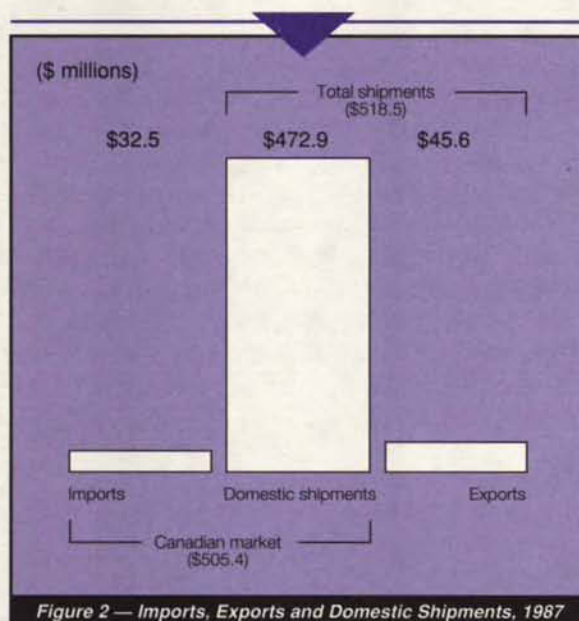
establishments are Canadian-owned. These establishments produce about 78 percent of manufacturers' shipments and account for 84 percent of employment. Foreign-owned (mostly American) manufacturers, while representing only 2.6 percent of all establishments, account for almost 22 percent of the Canadian industry's shipments. This is largely due to the fact that the second-largest manufacturer in Canada is U.S.-owned. It has one of the most specialized production operations in the country, producing backlit signs for international markets.

## Performance

In response to generally favourable market conditions, which facilitated new construction in the private and public sectors and encouraged consumer spending at all levels of the retail and service trades, the industry prospered, with shipments increasing an average of 20 percent per year in current dollars between 1973 and 1980. Annual growth slowed to 4.9 percent during the 1981–1982 recession but has been around 20 percent since 1984.

Employment increased gradually during this period. In 1973, 5 410 people worked in the industry. That total had risen to 6 734 in 1980 and to 9 869 in 1988. Even during the 1981–1982 recession, certain specialized segments of the industry were able to maintain production at pre-recession levels or to show modest gains. These gains occurred mainly for companies selling outdoor advertising displays. They benefited when corporations were forced to depart from their preferred, but more expensive, television and radio advertising routes. Highway billboard advertising provided them with a more cost-effective channel of communication.





Exports accounted for 8.8 percent of Canadian shipments in 1987, compared with 3 percent in 1973.<sup>1</sup> For the specialized manufacturers involved in international trade, this increase represented a rise from \$2.8 million in 1973 to \$45.6 million in 1987. Imports increased modestly by about 8.2 percent per year during this period, but the import share of the Canadian market actually declined from 10.8 percent in 1973 to 6.4 percent in 1987. For the most part, the focus on local, custom work has protected this industry from strong import competition. At the same time, however, the ability of Canadian firms to develop and offer innovative new products with a high design component has allowed them increasingly to penetrate the U.S. market. Since 1985, the signs and displays industry has been in a positive balance-of-trade position, improving from a modest \$200 000 surplus in 1985 to a more substantial \$13.1 million surplus in 1987.

Throughout the world, this industry manufactures most of its products for local markets. However, some products lend themselves to international trade. Since 1985, some of the medium-sized and large firms, particularly those making signs, have concentrated on developing export markets. This change in orientation has been encouraged by the moderating growth rate of the Canadian market, and export marketing strategies have become an integral part of some manufacturers' corporate planning. Even some small producers who manufacture specialized, high-quality products have been

successful in the U.S. market. For the most part, Canadian signs and displays manufacturers who have developed specialized market niches, such as in illuminated backlit signs, enjoy an excellent reputation on international markets for innovative and high-quality products.

In 1987, exports totalled \$45.6 million, while imports into Canada amounted to \$32.5 million (Figure 2). Signs account for about 60 percent of these exports (of which illuminated signs account for one-half). In 1987, the United States was both the prime destination of Canadian exports, buying 80.8 percent of them, and the principal source of imports, accounting for 77.1 percent of all signs and displays brought into Canada. Other countries where Canadian firms have found specialized market niches are the United Kingdom, Switzerland, Japan and Australia, which together account for almost 12 percent of all exports of Canadian signs and displays.

From 1985 to 1987, investment in new plant and equipment has been sufficient to meet steady industry growth.

## Strengths and Weaknesses

### Structural Factors

Canadian firms do a good job of satisfying local demand, but many Canadian companies are too small to compete in larger or international markets. Besides lacking advantages in economies of scale, small companies usually lack well-trained professional management teams. Some materials are cheaper in the United States than in Canada, and transportation costs can be a significant cost factor for Canadian producers that must ship goods beyond local markets. Nonetheless, some Canadian companies have become quite competitive in certain niche markets. Backlit signs have been a special area of some success. There have also been some successful attempts to apply new technologies. Computer-aided design and computer-aided manufacturing (CAD/CAM) technology has reduced costs of production, but Canadian firms have been slow to adopt this technology.

For small orders of signs and displays, quality and good service tend to be more important than price. As a result, small producers generally are not subjected to international competition. Products that can be produced in large production runs are more price sensitive. Domestic and external competition exists among large and medium-sized firms for the longer production runs and large national accounts, which represent an estimated 20 percent of the overall market.

<sup>1</sup>A discontinuity in trade data between 1987 and 1988 has resulted from a change in the classification system used by Statistics Canada (see note regarding the Harmonized Commodity Description and Coding System (HS) on page 7). Consequently, this analysis will only discuss trends up to 1987.





Companies with between 50 to 100 employees appear to have reached the optimal size to achieve the greatest efficiencies in terms of economies of scale.

There are many small signs and displays companies in the United States, as there are in Canada; however, there are also comparatively more large manufacturers in the United States than in Canada. Overall, this results in greater economies of scale within the U.S. industry and higher productivity levels per employee because of the longer production runs and greater utilization of machinery and equipment.

In general, the small scale and fragmentation of the Canadian industry have resulted in weaker management structures. Only the larger companies are administered by highly trained professional management teams. The vast majority of firms are small, family-owned enterprises that have developed because of the natural expertise and skills in production and sales of the owner-managers. These owner-managers often lack expertise in other business functions. Such management insufficiencies have had the effect of limiting most of these companies from growing beyond the city or region where the manufacturing facility is located. The size of these firms restricts the extent to which a full-fledged management team can be financially justified.

The large Canadian companies that are subject to international competition must spend more for materials than their U.S. counterparts. Many of the specialized materials and components used in manufacturing (lamps, metal boxes, acrylics) are imported, and the Canadian price therefore reflects the additional costs of customs duties, which range from 10 to 20 percent.

Transportation is not a significant cost element for companies serving local markets only. However, for firms interested in serving larger market areas, distance can become a limiting cost factor. As a result, the bulk of sales to U.S. accounts usually occur within 150 kilometres of the Canadian border.

With regard to technology, some firms have been prompt to adopt the backlit advertising system originating in Europe. The application of the latest technologies has been used as a successful marketing tool by manufacturers to impress an increasingly critical buying audience. Most successful new products have been developed in the electric sign segment of the industry.

There is currently no significant shortage in the supply of qualified labour. However, as the use of CAD/CAM technology increases, there is a need to upgrade the basic skill-level requirement of many positions from semi-skilled machine operators to more specialized technicians.

### **Trade-Related Factors**

In 1988, the Canadian Most Favoured Nation tariff rate for signs and displays ranged from 10.2 to 15 percent. The U.S. tariff ranged from 2.5 to 8 percent, with most products subject to a 4 to 7 percent rate of import duty. Many display products are classified as metal or wooden furniture, with tariff rates in Canada of 12.6 to 15 percent and in the United States of 2.5 to 4 percent. Tariff rates in the European Community are about 8 percent. They are 5 to 8 percent in Japan.

The most significant non-tariff barriers affecting trade in signs and displays between Canada and the United States are local government procurement policies, which favour local producers. In addition, variances in technical standards between the two countries have caused difficulties in the past for manufacturers who wanted to produce a single product for the two markets. Many electrical components, for example, had to be approved by both the Canadian Standards Association (CSA) and the Underwriters' Laboratory (UL) to be marketed uniformly throughout North America.

Under the Canada-U.S. Free Trade Agreement (FTA), all tariffs relating to signs and displays will be phased out. The tariff on most sign products will be eliminated in ten equal, annual steps commencing 1 January 1989, while display product tariffs that fall under a furniture designation will be phased out in five equal, annual steps.

### **Technological Factors**

Generally, only the largest, most progressive manufacturers are aware of the latest materials and technologies in their field. They gain this knowledge through regular contact with suppliers and producers in Canada, the United States and Western Europe. Some sign manufacturers have been progressive in applying new technologies from other fields to their industry.

The electric sign segment appears to hold out the most significant opportunities for innovation through the use of modern technologies. Some companies used computerized digital displays and fibre optics in the creation of electric signs. Successful new products involving new technologies in electric signs are often the result of joint ventures between small, innovative manufacturers, a professional management team and design-oriented companies specializing in the development and manufacture of electronic products.

The emphasis on individual craft skills in the manufacturing process and the hands-on orientation of management have left the sign subsector reluctant to adopt new computer-controlled equipment in the manufacturing process. It is mainly the medium-sized and larger sign producers who have invested in CAD/CAM equipment for the overall design and manufacture of signs, although such equipment has been





available at a reasonable cost for several years. The few small manufacturers who have begun to employ specialized machinery using CAD/CAM technology to improve production and competitiveness have recently met with some international success. Technological innovation may offer Canadian companies cost-effective and labour-saving ways to manufacture signs for world markets.

Artistic and creative designs and innovative production techniques are more significant factors for merchandising displays than are applications of new technology. Only companies involved in the mass-production of products such as store display fixtures or modular exhibit booths use computerized equipment in their manufacturing processes. However, the most enterprising firms are prompt to incorporate the latest technical features in their products to gain an avant-garde effect.

### Other Factors

Government procurement practices have an important effect on the vitality of the signs and displays industry. The government share of the market is about 30 percent. Government regulations and fiscal policies also affect the industry.

Many municipalities across North America have introduced sign by-laws, reflecting their concern for the problem of "visual" pollution. These restrictions apply to the dimensions of signs within municipalities, the number of signs allowed in particular locations and their distance from major roadways. Manufacturers are experiencing greater difficulties in supplying the needs of their customers where restrictions differ across municipal jurisdictions.

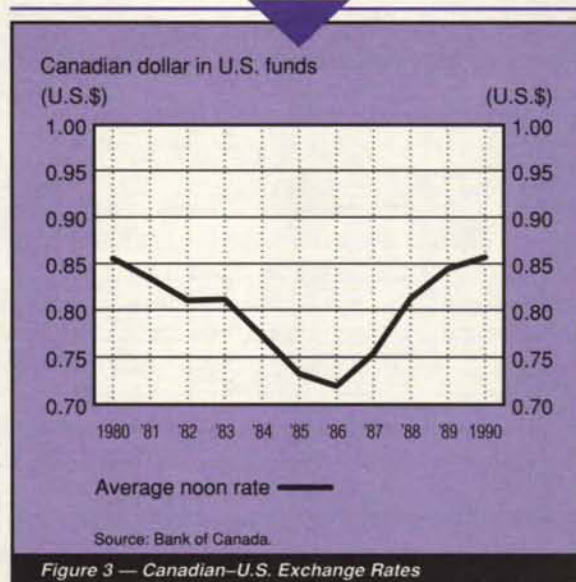
The industry has expressed concerns about recent Canadian-U.S. exchange rates (Figure 3). Currency devaluation, however, is widely recognized as being inflationary, and inflation can offset, to varying degrees, the competitive gains of a lower dollar.

## Evolving Environment

Overall, it is projected that Canadian demand for signs and displays over the medium term will continue to reflect general economic conditions.

The North American market is becoming increasingly integrated and will continue to provide opportunities to the Canadian industry for expansion and development. This fact should encourage small, specialized manufacturers to examine the North American market potential rather than confining their marketing efforts to the limited Canadian market.

For the most part, innovations in the industry will continue to result from the application of new technologies



developed in other industries that can be adapted or transferred to a receptive and progressive signs and displays industry. Electronics and CAD/CAM technologies will continue to make inroads into plants of all sizes to improve efficiency and economy in production.

The FTA is unlikely to have a major impact on most small producers who manufacture small custom orders for a local market. The greatest impact will be felt by the medium-sized and larger manufacturers who serve large national accounts. Increasingly, they will compete directly with the much larger American producers who will have a greater opportunity to increase their share of the Canadian market. On the other hand, the reduction of tariffs on materials and components imported from the United States by Canadian manufacturers will reduce the overall cost of finished goods. In addition, a few of the larger Canadian manufacturers or small companies specializing in particular niches will be able to use free trade to increase their presence in the American market. The factors generated by the FTA will probably result in some restructuring within the Canadian industry as more specialization in manufacturing becomes the norm.

Under the FTA, the United States will continue to be the dominant export market for Canadian signs and displays, as well as the principal source of imports. Since both countries have agreed not to impede trade with technical barriers and to recognize the other's system for laboratory accreditation and product testing, it is anticipated that the process of having new products approved by the CSA and UL for exporting will be simplified.



## Competitiveness Assessment

The Canadian signs and displays industry, like the industry worldwide, has had most producers focusing on the specific needs of their local customers. International competition therefore has usually concerned products that benefit from large production runs for major national accounts, such as retail chains, car dealerships or gas service stations. In this area, a few large, efficient Canadian companies are internationally competitive, and they account for most of the export sales in this industry.

International trade has already started to develop along the lines of manufacturing specialization. In Canada, the industry has developed international expertise in backlit signs. On the display side, the U.S. industry is a world leader in the production of fashion mannequins, while mass-produced, labour-intensive decorative and display props generally originate in the Far East.

It is not anticipated that the FTA will have a major impact on most segments of the signs and displays industry located in Canada.

For further information concerning the subject matter contained in this profile, contact

Consumer Products Branch  
Industry, Science and Technology Canada  
Attention: Signs and Displays  
235 Queen Street  
OTTAWA, Ontario  
K1A 0H5  
Tel.: (613) 954-3108  
Fax: (613) 954-3107





## PRINCIPAL STATISTICS<sup>a</sup>

	1983	1984	1985	1986	1987	1988
Establishments	525	583	603	631	566	664
Employment	6 073	7 126	7 856	8 993	8 817	9 869
Shipments (\$ millions)	287.9	365.9	439.8	515.9	518.5	606.1
Investment <sup>b</sup> (\$ millions)	17.2	20.0	21.7	24.1	31.0	14.6

<sup>a</sup>See *Other Manufacturing Industries*, Statistics Canada Catalogue No. 47-250, annual (SIC 3971: sign and display industry).

<sup>b</sup>See *Capital and Repair Expenditures, Manufacturing Subindustries, Intentions*, Statistics Canada Catalogue No. 61-214, annual.

## TRADE STATISTICS

	1983	1984	1985	1986	1987	1988 <sup>a</sup>
Exports <sup>b</sup> (\$ millions)	16.7	18.3	29.3	35.2	45.6	16.4
Domestic shipments (\$ millions)	271.2	347.6	410.5	480.7	472.9	589.7
Imports <sup>c</sup> (\$ millions)	18.8	24.6	29.1	30.6	32.5	33.3
Canadian market (\$ millions)	290.0	372.2	439.6	511.3	505.4	623.0
Exports (% of shipments)	5.8	5.0	6.7	6.8	8.8	2.7
Imports (% of Canadian market)	6.5	6.6	6.6	6.0	6.4	5.3

<sup>a</sup>It is important to note the data for 1988 and after 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 levels for 1988 and after 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 these levels.

<sup>b</sup>See *Exports by Commodity*, Statistics Canada Catalogue No. 65-004, monthly.

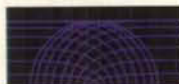
<sup>c</sup>See *Imports by Commodity*, Statistics Canada Catalogue No. 65-007, monthly.

## SOURCES OF IMPORTS<sup>a</sup> (% of total value)

	1982	1983	1984	1985	1986	1987	1988
United States	82.6	84.6	84.0	84.5	75.6	77.1	72.9
European Community	12.5	9.8	10.1	9.5	16.1	13.4	17.4
Asia	3.4	3.7	3.9	3.6	4.0	5.9	8.0
Other	1.5	1.9	2.0	2.4	4.3	3.6	1.7

<sup>a</sup>See *Imports by Commodity*, Statistics Canada Catalogue No. 65-007, monthly.





## DESTINATIONS OF EXPORTS<sup>a</sup> (% of total value)

	1982	1983	1984	1985	1986	1987	1988
United States	68.0	78.1	80.0	87.0	85.5	80.8	84.5
European Community	17.4	8.2	7.5	6.4	5.0	6.8	6.2
Asia	0.1	0.4	4.3	0.7	2.3	3.2	1.9
Other	14.5	13.3	8.2	5.9	7.2	9.2	7.4

<sup>a</sup>See *Exports by Commodity*, Statistics Canada Catalogue No. 65-004, monthly.

## REGIONAL DISTRIBUTION<sup>a</sup> (average over the period 1986 to 1988)

	Atlantic	Quebec	Ontario	Prairies	British Columbia
Establishments (% of total)	4.0	24.0	43.6	16.5	11.9
Employment (% of total)	3.7	23.4	53.4	12.1	7.4
Shipments (% of total)	3.5	21.2	56.4	11.0	7.9

<sup>a</sup>See *Other Manufacturing Industries*, Statistics Canada Catalogue No. 47-250, annual (SIC 3971: sign and display industry).

## MAJOR FIRMS

Name	Country of ownership	Location of major plants
CDA Industries Inc.	Canada	Scarborough, Ontario
Dymert Limited	Canada	Toronto, Ontario
Mediacom Industries Inc.	United States	National
Jim Pattison Enterprises Ltd.	Canada	National
Teksign Inc.	Canada	Mississauga, Ontario





## INDUSTRY ASSOCIATIONS

Electrical Advertising Association of Alberta  
6304 - 6A Street S.E.  
CALGARY, Alberta  
T2H 2B7  
Tel.: (403) 258-0556  
Fax: (403) 253-0110

Outdoor Advertising Association  
of Canada (OAAC)  
Suite 302, 1300 Yonge Street  
TORONTO, Ontario  
M4T 1W6  
Tel.: (416) 968-3435  
Fax: (416) 968-0154

Quebec Sign Association/Association professionnelle  
des fabricants d'enseignes du Québec (APFEQ)  
74 Lampron Street  
DRUMMONDVILLE, Quebec  
J2A 1W4  
Tel.: (819) 478-3861  
Fax: (819) 478-4871

Sign Association of Canada (SAC)  
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