

**ELECTRONICS INDUSTRY AND HOUSEHOLD ELECTRICAL APPLIANCES INDUSTRY
STATISTICAL REVIEW**

THIRD QUARTER, 1985

February 1986

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Electronics Directorate
Regional Industrial Expansion
February 1986

Source of Statistics - Statistics Canada

ELECTRONICS INDUSTRY

Highlights - Third Quarter 1985

For the first three quarters of 1985, the Canadian electronics industry exhibited relatively strong performance while facing an apparent domestic market that was largely flat. Compared to 1984, shipments were up by nearly 13 per cent, most of which growth was destined for export markets. All sub-sectors, except office and store machinery, contributed to this growth.

Employment levels were up only marginally from the previous quarter but down slightly more than one per cent from a year earlier.

Total shipments of the **communications equipment and components sector** for the third quarter of 1985 were \$897 million and totalled \$2 851 million for the year to date. By comparison, imports for this quarter stood at \$771 million while exports stood at \$688 million. Imports for the first three quarters now stand at \$2 389 million while exports for the comparable period total \$2 154 million. Canada's cumulative trade deficit in this sector is now at \$235 million for 1985. This deficit is less than half the deficit for the same period in 1984. A slight decline in the trade surplus for communications equipment was more than offset by a 36 per cent improvement in the trade deficit for integrated circuits and a 16 per cent improvement in the deficit for other electronic components.

Exports from Canada in the **office and store machinery** sector declined by 6.3 per cent in the third quarter reflecting current market difficulties in the U.S. Imports dropped by 1.8 per cent indicating a strong market in Canada and the integrated nature of the international companies in the sector. For similar reasons, shipments declined more rapidly than market size (11.8 per cent vs. 3.3 per cent). A comparison of the first three quarters of 1985 to 1984 shows the trade position improving as exports increased and imports fell 2.7 per cent.

The major commodity within this sector is electronic computers and parts. Exports in the third quarter fell substantially (20.3 per cent for exports to the U.S.). Imports in the third quarter were down 17.5 per cent indicating a slowing of market growth in Canada. However, an improvement in exports indicate perhaps the beginning of a recovery in the U.S. market.

The overall market (in dollars) for **radio and television** increased sharply in the third quarter of 1985, largely in response to substantial jumps in T.V. and tape player (mostly VCRs) imports in preparation for the fall and Christmas buying seasons. In dollar value, 81 per cent of all tape recorders (audio and video) came from Japan which also accounted for almost 40 per cent of colour sets of less than 19 inches (a 150 per cent increase over the second quarter of 1985); the U.S.

increased its exports of colour sets of more than 19 inches to Canada by 53 per cent, thereby taking 53 per cent of this import market. In black and white sets, Korea boosted its exports of small sets to Canada by 77 per cent in this quarter. During this same period, the Canadian T.V. manufacturers had been preparing their cases for the Import Tribunal and the Tariff Board hearings on dumping of colour sets by Koreans and the permanent withdrawal of the GPT rate of free for these sets. On the export front, despite Canadian exports of colour sets being slightly off in this quarter from the record high registered in the previous quarter, the first nine months of 1985 witnessed an increase of almost 80 per cent over the same period in 1984. The U.S. took in more than 97 per cent of Canadian T.V. exports during this period.

In the third quarter of 1985 shipments of **instruments** continued at almost the same level to those of the second quarter, amounting to \$134.0 million. The first three quarters shipments, at \$406.0 million, were 13.1 per cent above the corresponding figure for 1984. The Apparent Domestic Market for the third quarter of 1985 increased by 5.5 per cent over the second quarter and amounted to \$305.0 million. The exports in the third quarter were below those of the second quarter but were still 11.5 per cent higher than the corresponding figure for 1984.

TABLE 1
ELECTRONIC PRODUCTS
THIRD QUARTER BY INDUSTRIAL SECTORS

	1985		1984	% Change	
	3rd Qtr	2nd Qtr	3rd Qtr	Qtr	Annual
----- \$ Millions -----					
COMMUNICATIONS EQUIPMENT & COMPONENTS					
ADM	980	1 058	970	(7.4)	1.0
*Shipments	897	990	828	(9.4)	8.3
Trade Surplus (Deficit)	(83)	(68)	(142)	22.1	(41.5)
Exports	688	753	674	(8.6)	2.1
Imports	771	821	816	(6.1)	(5.5)
OFFICE & STORE MACHINERY					
ADM	961	994	1 076	(3.3)	(10.7)
*Shipments	321	364	393	(11.8)	(18.3)
Trade Surplus (Deficit)	(640)	(630)	(683)	1.6	(6.3)
Exports	448	478	483	(6.3)	(7.2)
Imports	1 088	1 108	1 166	(1.8)	(6.7)
RADIO AND TELEVISION					
ADM	439	365	468	20.3	(6.2)
*Shipments	145	132	124	9.8	16.9
Trade Surplus (Deficit)	(294)	(233)	(344)	26.2	(14.5)
Exports	45	59	39	(23.7)	15.4
Imports	339	292	383	16.1	(11.5)
INSTRUMENTS					
ADM	305	289	252	5.5	21.0
*Shipments	134	136	114	(1.5)	17.5
Trade Surplus (Deficit)	(171)	(153)	(138)	11.8	23.9
Exports	58	62	52	(6.5)	11.5
Imports	229	215	190	6.5	20.5
TOTAL					
ADM	2 685	2 706	2 766	(0.8)	(2.9)
*Shipments	1 497	1 622	1 459	(7.7)	2.6
Trade Surplus (Deficit)	(1 188)	(1 084)	(1 307)	9.6	(9.1)
Exports	1 239	1 352	1 248	(8.4)	(0.7)
Imports	2 427	2 436	2 555	(0.4)	(5.0)

*Shipments - goods of own mfr. classified by the 1980 S.I.C.

TABLE 2
ELECTRONIC PRODUCTS
THIRD QUARTER BY COMMODITY EXPORTS AND IMPORTS

	1985		1984	% Change	
	3rd Qtr	2nd Qtr	3rd Qtr	Qtr	Annual
----- \$ 000 -----					
COMMUNICATIONS EQUIPMENT					
Exports	415 802	418 881	427 297	(0.7)	(2.7)
Imports	242 292	230 975	209 911	4.9	15.4
Trade Surplus (Deficit)	173 510	187 906	217 386	(7.7)	(20.2)
ELECTRONIC COMPONENTS					
Exports	271 698	334 193	246 885	(18.7)	10.1
Imports	529 088	589 652	605 593	(10.3)	(12.6)
Trade Surplus (Deficit)	(257 390)	(255 459)	(358 708)	0.8	(28.2)
TELEPHONE APPARATUS EQUIPMENT & PARTS					
Exports	197 198	211 388	204 117	(6.7)	(3.4)
Imports	61 514	61 525	57 096	(0.02)	7.7
Trade Surplus (Deficit)	135 684	149 863	147 021	(9.5)	(7.7)
PRINTED CIRCUIT BOARDS					
Exports	12 866	13 872	10 967	(7.3)	17.3
Imports	11 970	9 095	11 961	31.6	0.08
Trade Surplus (Deficit)	896	4 777	(994)	(81.2)	
ELECTRONIC COMPUTERS & PARTS					
Exports	442 612	472 584	475 507	(6.3)	(6.9)
Imports	951 940	965 314	1 021 411	(1.4)	(6.8)
Trade Surplus (Deficit)	(509 328)	(492 730)	(545 904)	3.4	(6.7)
INTEGRATED CIRCUITS & SEMI-CONDUCTORS & PARTS					
Exports	181 392	227 602	151 991	(20.3)	19.3
Imports	278 400	326 264	337 571	(14.7)	(17.5)
Trade Surplus (Deficit)	(97 008)	(98 662)	(185 580)	(1.7)	(47.7)

TABLE 2 (Cont'd)
ELECTRONIC PRODUCTS
THIRD QUARTER BY COMMODITY EXPORTS AND IMPORTS

	1985		1984	% Change	
	<u>3rd Qtr</u>	<u>2nd Qtr</u>	<u>3rd Qtr</u>	<u>Qtr</u>	<u>Annual</u>
	----- \$ 000 -----				
TAPE PLAYERS, RECORDERS					
(EXC. PTS.)					
Exports		N.A.	N.A.	-	
Imports	127 113	93 376	171 095	36.1	(25.7)
Trade Surplus (Deficit)		-	-	-	
TELEVISION SETS					
Exports	15 922	17 827	15 740	(10.7)	1.2
Imports	60 991	43 704	67 812	39.6	(10.1)
Trade Surplus (Deficit)	(45 069)	(25 877)	(52 072)	74.2	(13.4)
RADIOS					
Exports	1 879	1 900	2 020	(1.1)	(7.0)
Imports	60 864	71 143	57 572	(14.4)	5.7
Trade Surplus (Deficit)	(58 985)	(69 243)	(55 552)	(14.8)	6.2
COMBINATION RADIO- PHONOGRAPH SETS					
Exports	25 812	37 765	20 012	(31.7)	29.0
Imports	81 454	77 643	80 780	4.9	0.8
Trade Surplus (Deficit)	(55 642)	(39 878)	(60 768)	39.5	(8.4)
GEOPHYSICAL & MINERAL PROSPECTION EQUIPMENT & PARTS					
Exports	8 587	11 241	9 834	(23.6)	(12.7)
Imports	64 671	43 117	35 047	50.0	84.5
Trade Surplus (Deficit)	(56 084)	(31 876)	(25 213)	75.9	122.4
COMMERCIAL COMMUNICATIONS EQUIPMENT N.E.S.					
Exports	111 064	99 468	86 287	11.7	28.7
Imports	85 951	78 999	68 555	8.8	25.4
Trade Surplus (Deficit)	25 113	20 469	17 732	22.7	41.6
PHOTOCOPY AND SIMILAR MACHINES & PARTS					
Exports	N.A.	N.A.	N.A.		
Imports	68 396	76 690	74 362	(10.8)	(8.0)

TABLE 3
ELECTRONIC PRODUCTS
FIRST THREE-QUARTER YEAR BY INDUSTRIAL SECTORS

	<u>1985</u>	<u>1984</u>	<u>% Change</u>
	----- \$ Millions -----		
COMMUNICATIONS EQUIPMENT AND COMPONENTS			
ADM	3 087	2 933	5.3
Shipments	2 851	2 454	16.2
Trade Surplus (Deficit)	(236)	(479)	(50.7)
Exports	2 154	1 907	13.0
Imports	2 390	2 386	0.2
OFFICE AND STORE MACHINERY			
ADM	3 038	3 161	(3.9)
Shipments	1 065	1 023	4.1
Trade Surplus (Deficit)	(1 973)	(2 138)	(7.7)
Exports	1 377	1 305	5.5
Imports	3 350	3 443	(2.7)
RADIO AND TELEVISION			
ADM	1 183	1 244	(4.9)
Shipments	402	348	15.5
Trade Surplus (Deficit)	(781)	(896)	(12.8)
Exports	155	116	33.6
Imports	936	1 012	(7.5)
INSTRUMENTS			
ADM	906	789	14.8
Shipments	406	359	13.1
Trade Surplus (Deficit)	(500)	(430)	16.3
Exports	172	144	19.4
Imports	672	574	17.1
TOTAL			
ADM	8 214	8 127	1.1
Shipments	4 724	4 184	12.9
Trade Surplus (Deficit)	(3 490)	(3 943)	(11.5)
Exports	3 858	3 472	11.1
Imports	7 348	7 415	(0.9)

TABLE 4
ELECTRONIC PRODUCTS
FIRST THREE-QUARTER YEAR BY COMMODITY EXPORTS AND IMPORTS

	<u>1985</u>	<u>1984</u>	<u>% Change</u>
	----- \$ 000 -----		
COMMUNICATIONS EQUIPMENT			
Exports	1 241 817	1 197 465	3.7
Imports	695 054	617 721	12.5
Trade Surplus (Deficit)	546 763	579 744	(5.7)
ELECTRONIC COMPONENTS			
Exports	911 943	709 434	28.5
Imports	1 695 092	1 768 610	(4.1)
Trade Surplus (Deficit)	(783 149)	(1 059 176)	(26.1)
TELEPHONE APPARATUS EQUIP. AND PTS.			
Exports	619 326	570 821	8.5
Imports	179 478	172 006	4.3
Trade Surplus (Deficit)	439 848	398 815	10.3
PRINTED CIRCUIT BOARDS			
Exports	39 572	31 087	27.3
Imports	30 239	32 344	(6.5)
Trade Surplus (Deficit)	9 333	(1 257)	
ELECTRONIC COMPUTERS & PTS.			
Exports	1 360 053	1 256 032	8.3
Imports	2 927 709	2 976 792	(1.6)
Trade Surplus (Deficit)	(1 567 656)	(1 720 760)	(8.9)
INTEGRATED CIRCUITS AND SEMI-CONDUCTORS & PTS.			
Exports	607 077	454 792	33.5
Imports	932 406	964 815	(3.4)
Trade Surplus (Deficit)	(325 329)	(510 023)	(36.2)
TAPE PLAYERS, RECORDERS (EXC. PTS.)			
Exports	nil	nil	nil
Imports	357 602	403 323	(11.3)
Trade Surplus (Deficit)			

TABLE 4 (Cont'd)
ELECTRONIC PRODUCTS
FIRST THREE-QUARTER YEAR BY COMMODITY EXPORTS AND IMPORTS

	<u>1985</u>	<u>1984</u>	<u>% Change</u>
	----- \$ 000 -----		
TELEVISION SETS			
Exports	48 983	34 300	42.8
Imports	150 138	191 816	(21.7)
Trade Surplus (Deficit)	(101 155)	(157 516)	(35.8)
RADIOS			
Exports	5 534	10 941	(49.4)
Imports	183 470	184 418	(0.5)
Trade Surplus (Deficit)	(177 936)	(173 477)	2.6
COMBINATION RADIO- PHONOGRAPH SETS			
Exports	97 290	67 474	44.2
Imports	224 870	213 913	5.1
Trade Surplus (Deficit)	(127 580)	(146 439)	(12.9)
GEOPHYSICAL AND MINERAL PROSP.			
Exports	27 067	25 843	4.7
Imports	155 838	113 295	37.6
Trade Surplus (Deficit)	(128 771)	(87 452)	47.2
COMMERCIAL COMMUNICATIONS			
Exports	302 493	268 187	12.8
Imports	230 635	204 624	12.7
Trade Surplus (Deficit)	71 858	63 563	13.1

TABLE 5

ELECTRONIC PRODUCTS

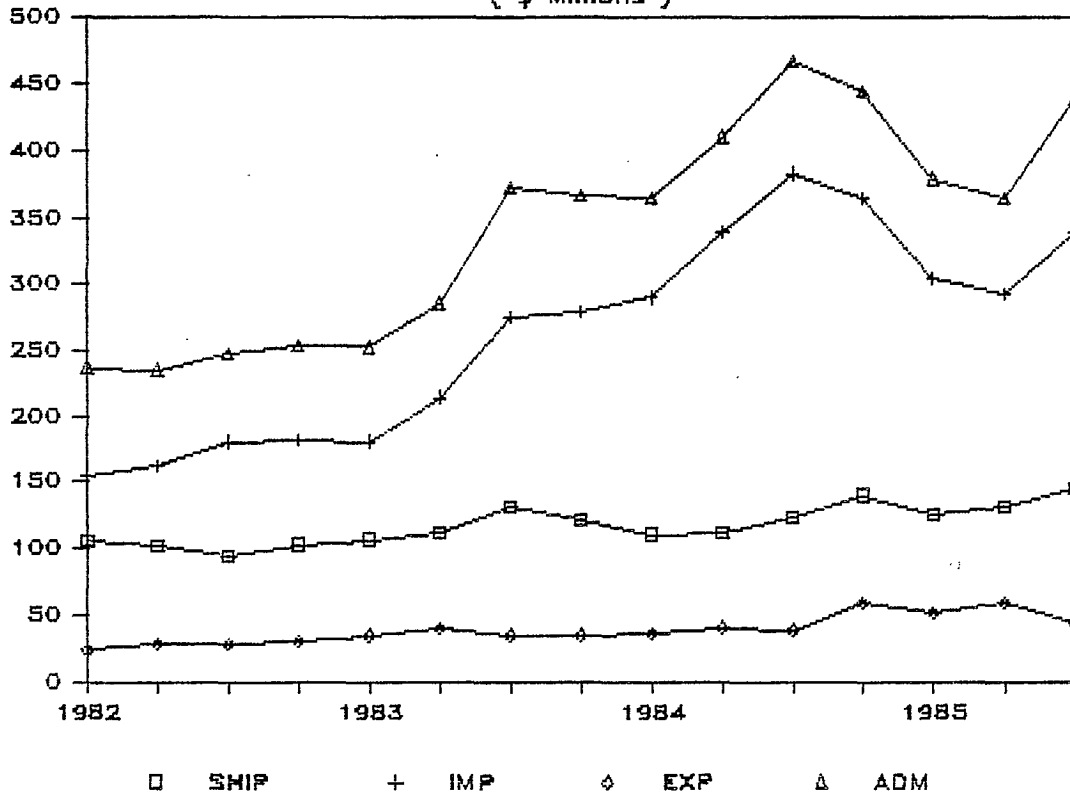
NUMBER OF EMPLOYEES BY INDUSTRIAL SECTORS

<u>INDUSTRIAL SECTORS</u>	<u>NUMBER OF EMPLOYEES</u>	
	<u>As At September 1985</u>	<u>As At September 1984</u>
Radio and Television	3 997	3 930
Communications Equipment & Components	47 450	47 394
Office & Store Machinery	15 450	14 238
Instruments (estimated)	<u>17 527</u>	<u>19 935</u>
	<u>84 424</u>	<u>85 497</u>

SOURCE: Employment, Earnings and Hours - Cat. No. 72-002.
Statistics Canada.

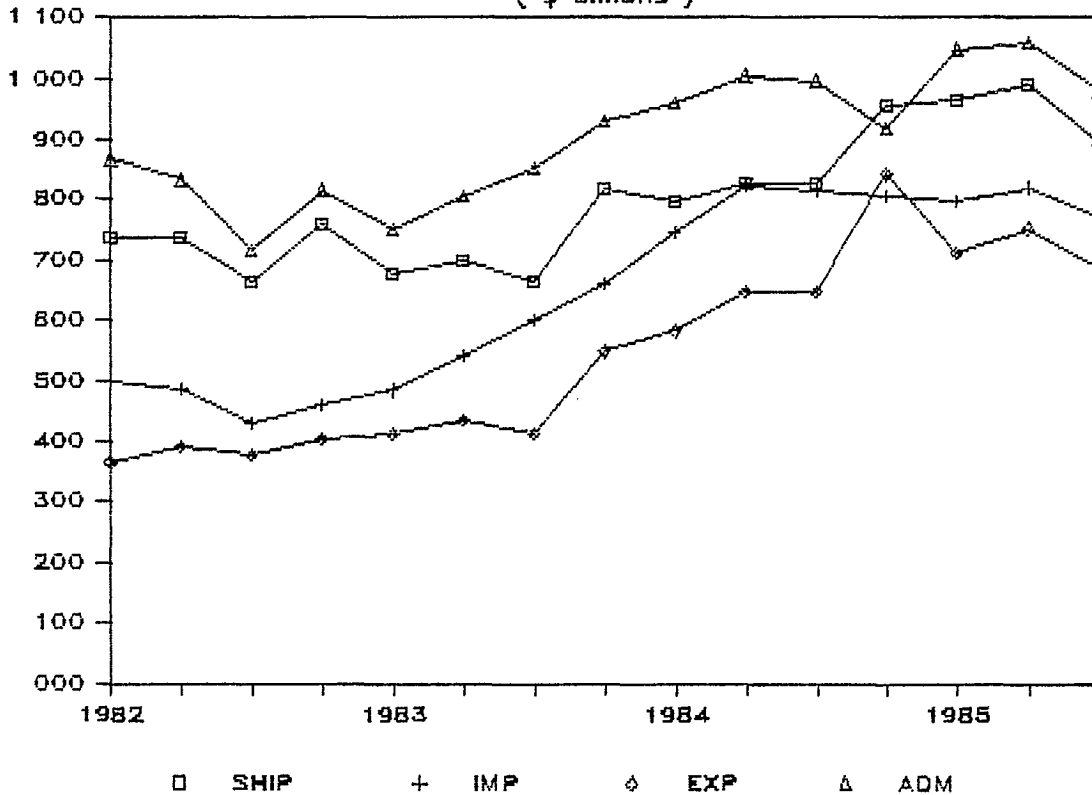
HOUSEHOLD RADIOS & TELEVISIONS

(\$ Millions)



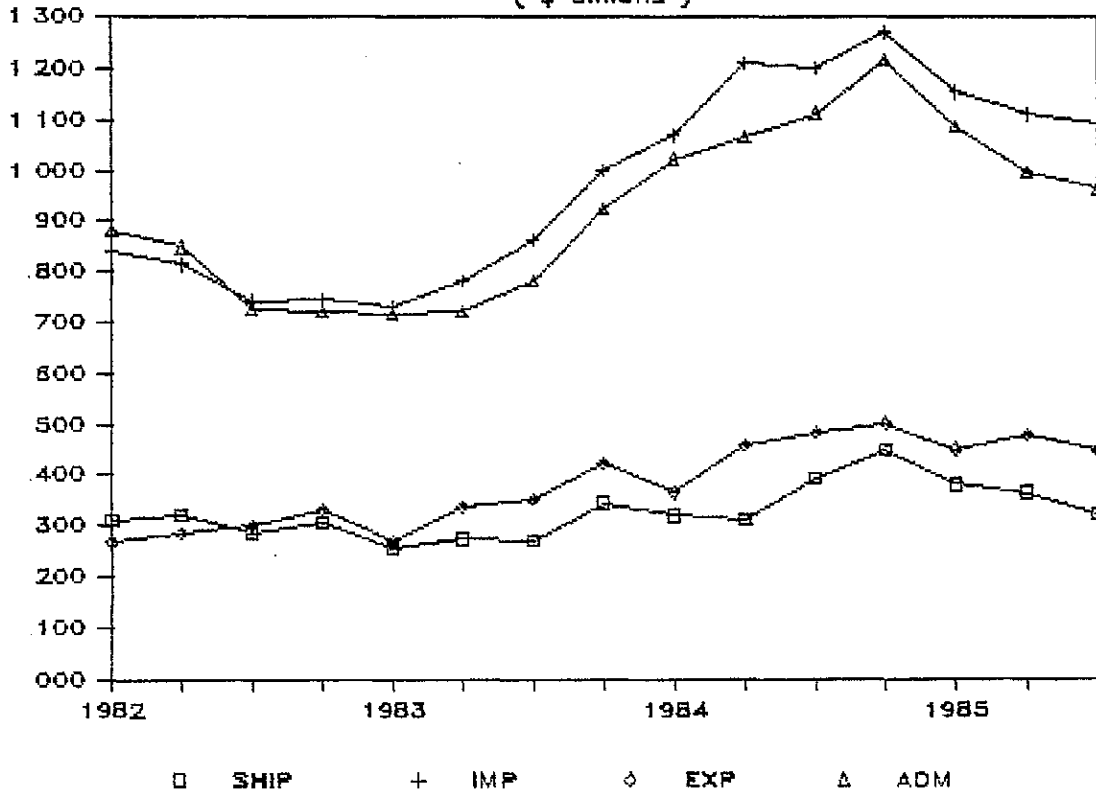
COMMUNICATIONS EQUIP. & COMPONENTS

(\$ Billions)



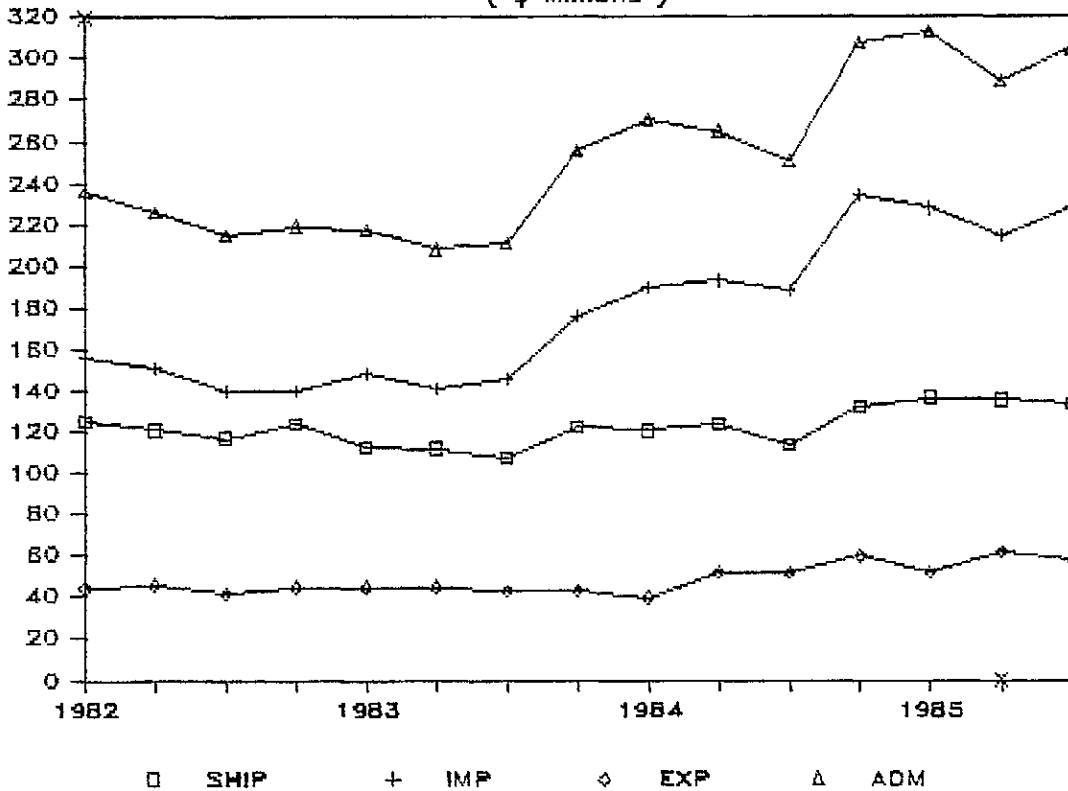
OFFICE & STORE MACHINERY

(\$ Billions)



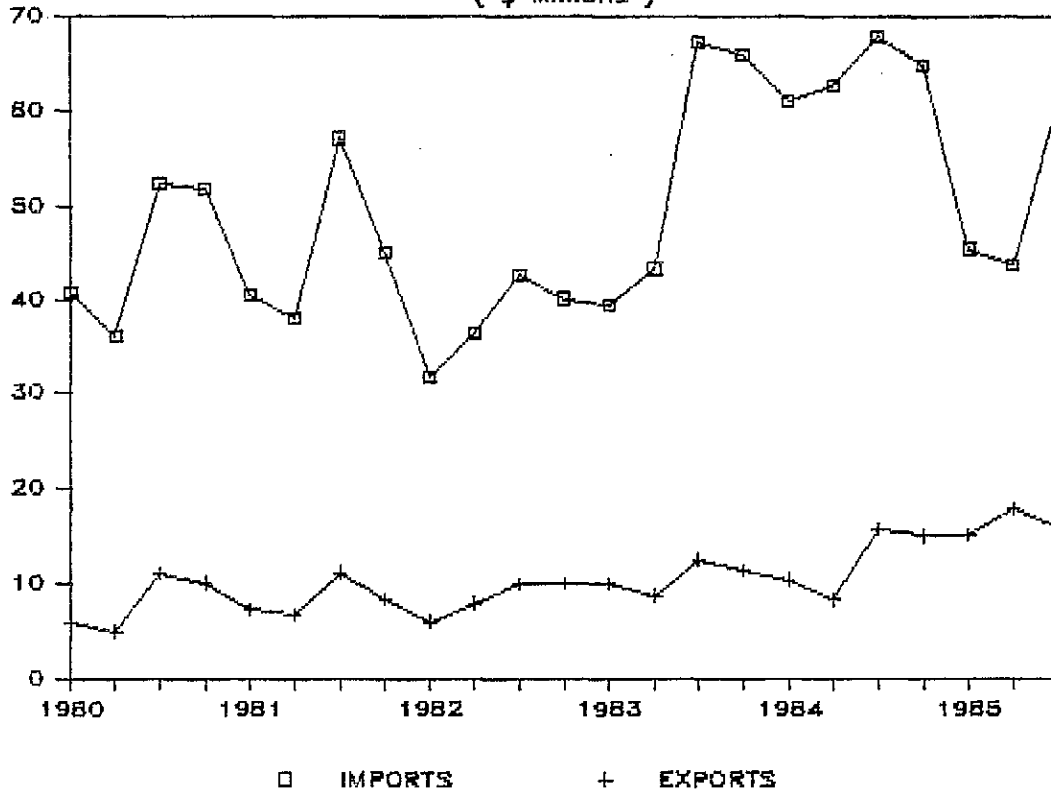
INSTRUMENTATIONS

(\$ Millions)



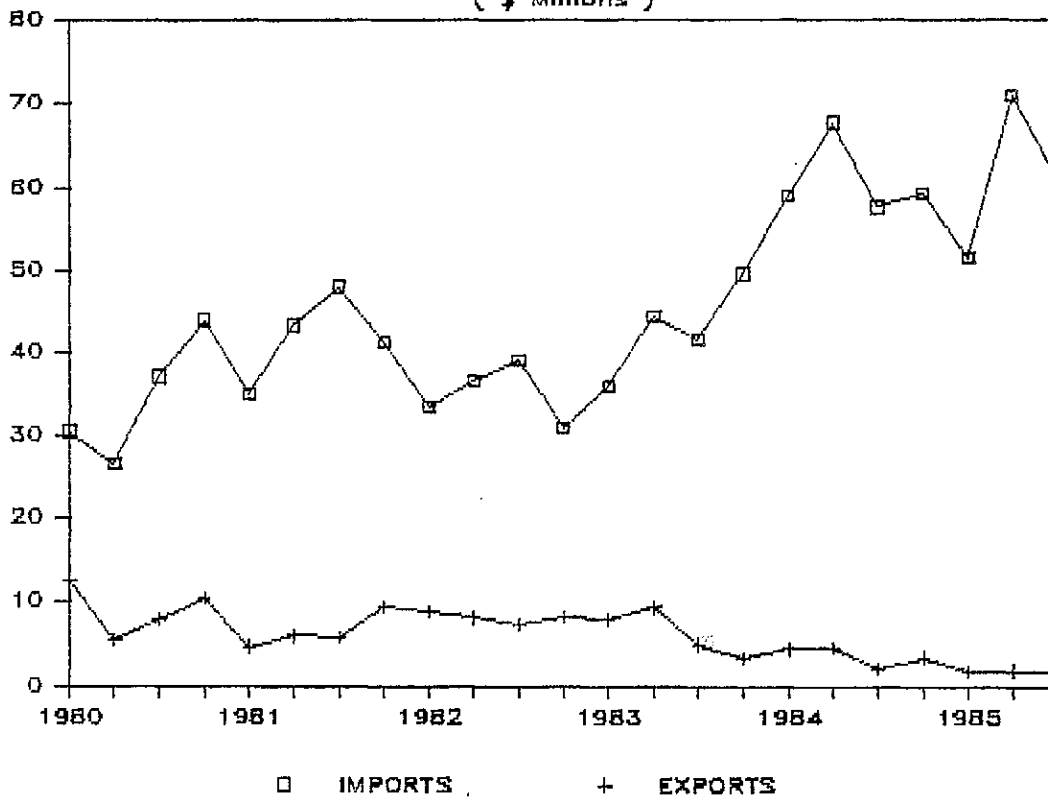
TELEVISION SETS

(\$ Millions)



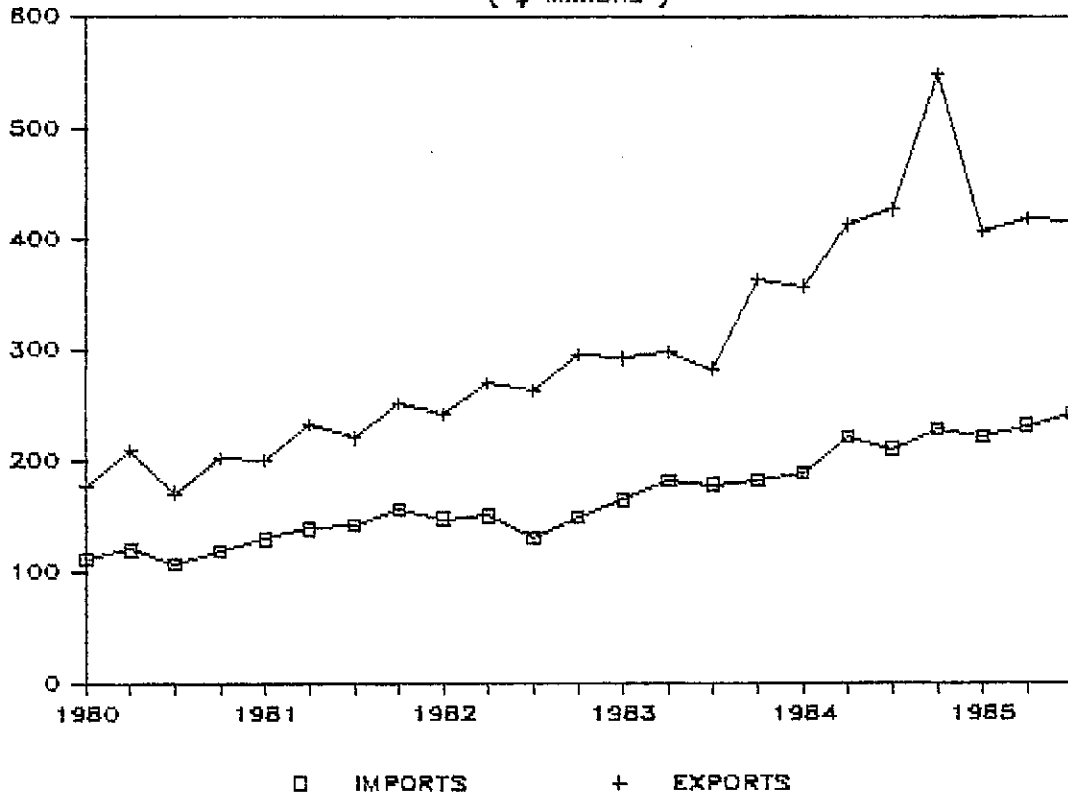
RADIOS

(\$ Millions)



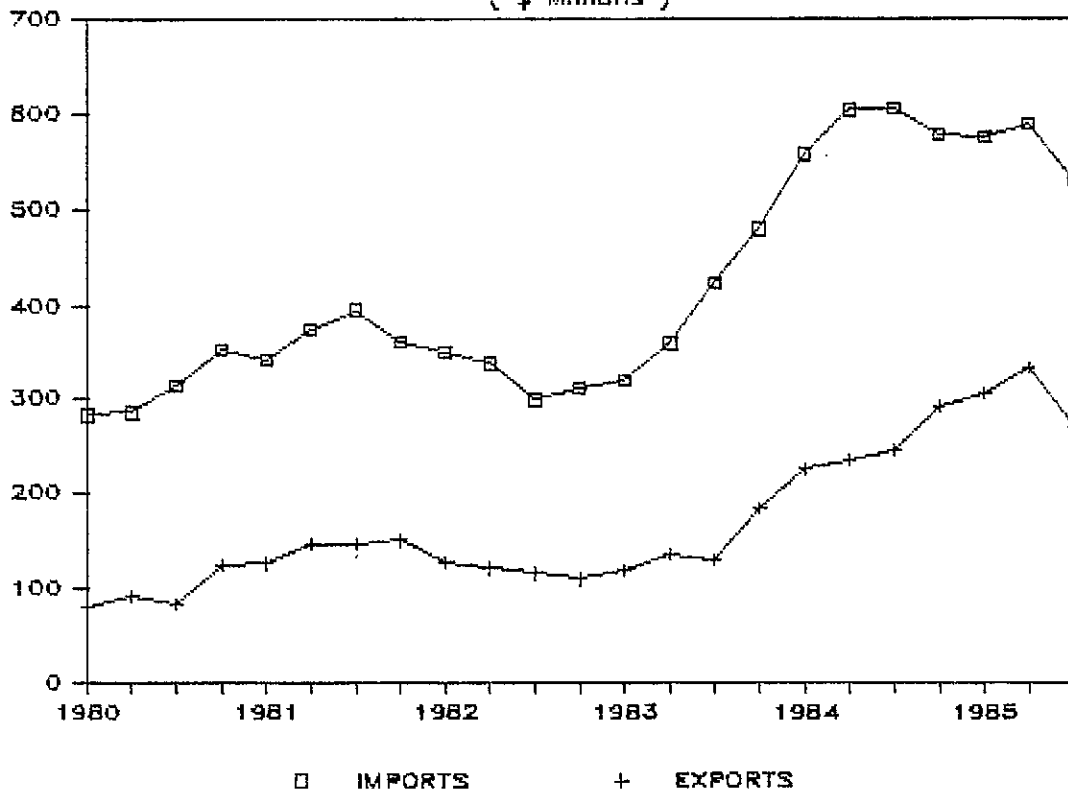
COMMUNICATIONS EQUIPMENT

(\$ Millions)



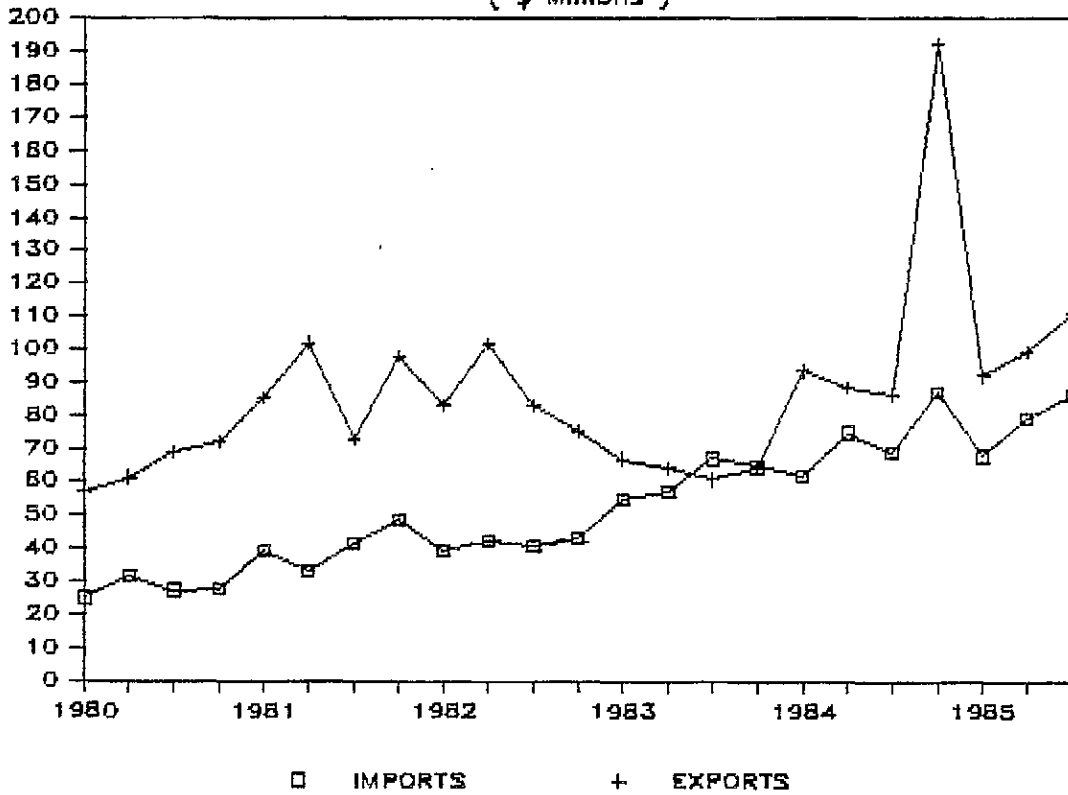
ELECTRONIC COMPONENTS

(\$ Millions)



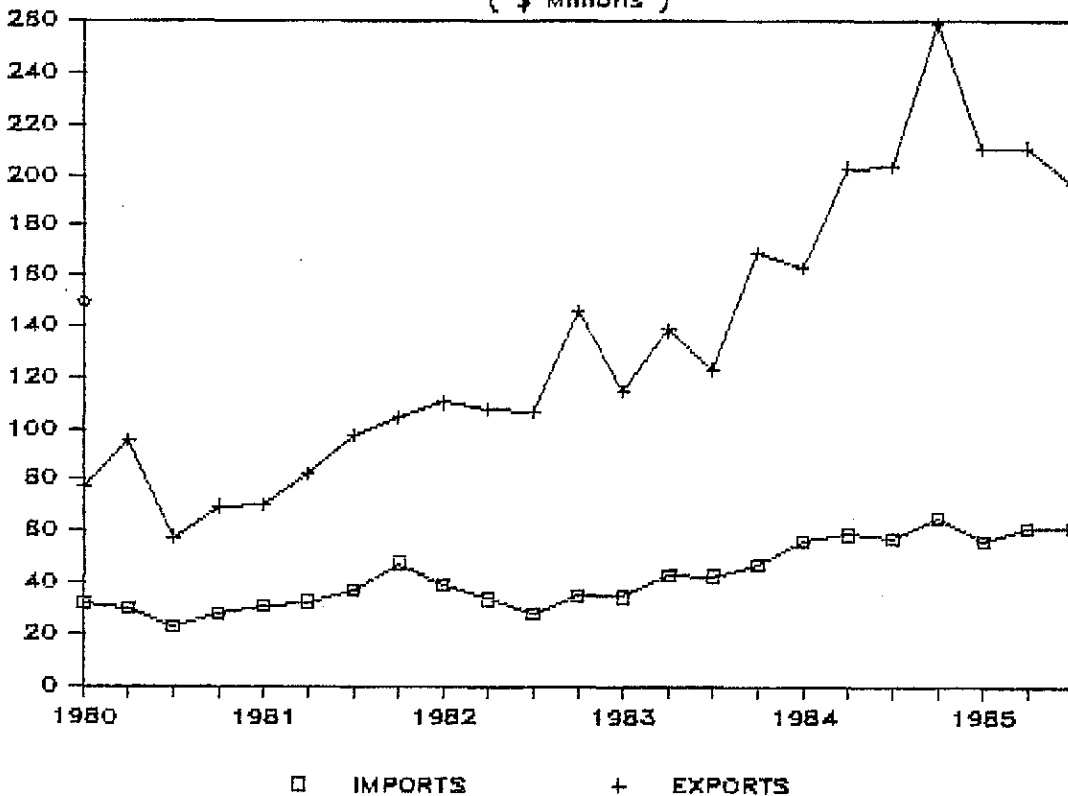
COMMERCIAL COMMUNICATIONS EQUIP. & PT

(\$ Millions)



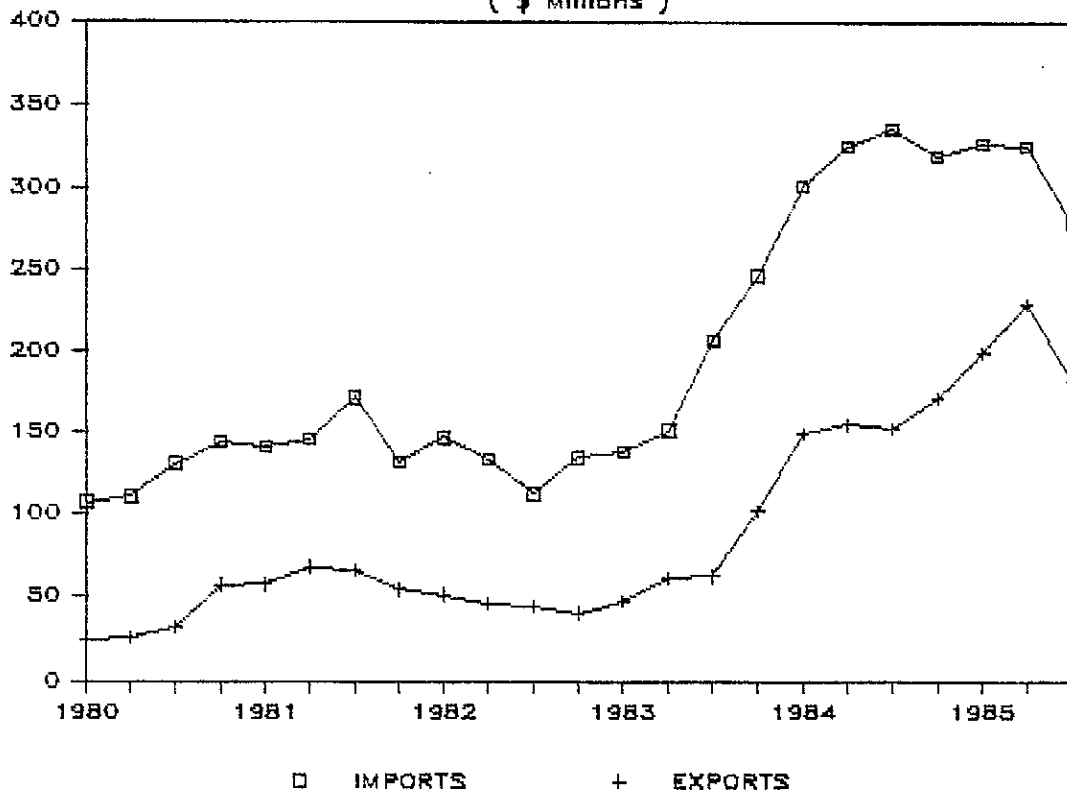
TELEPHONE APPARATUS & PARTS

(\$ Millions)



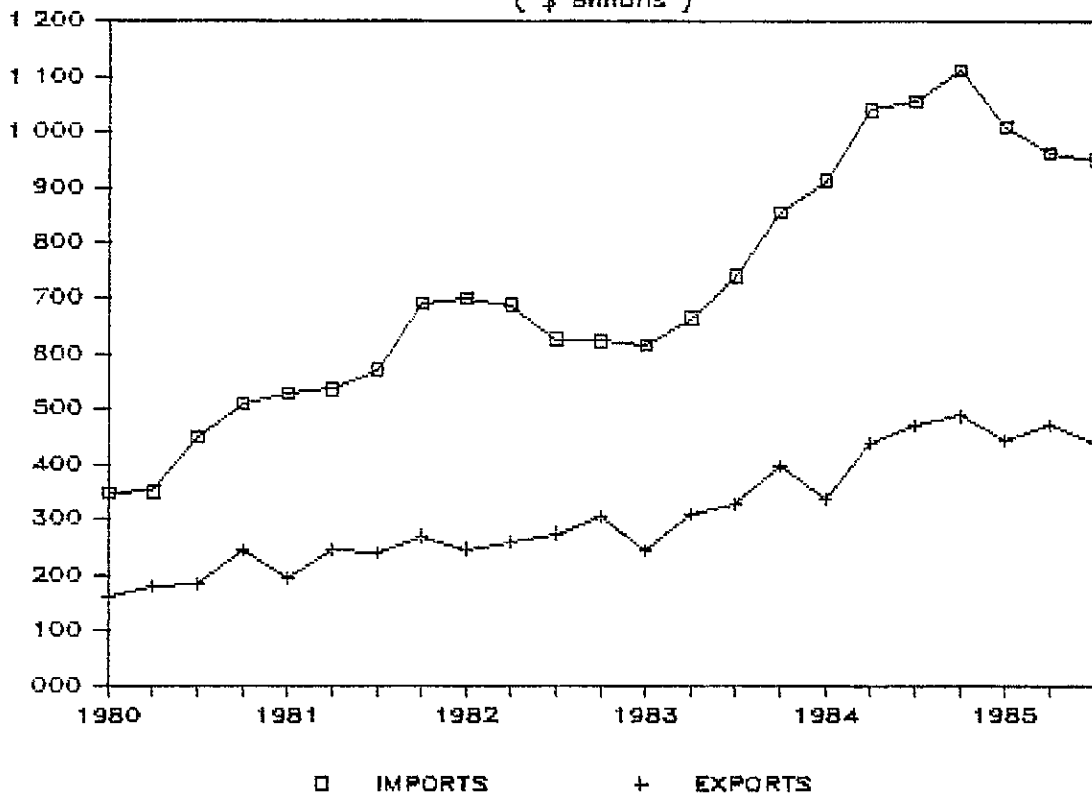
SEMI-CONDUCTORS & PARTS

(\$ Millions)



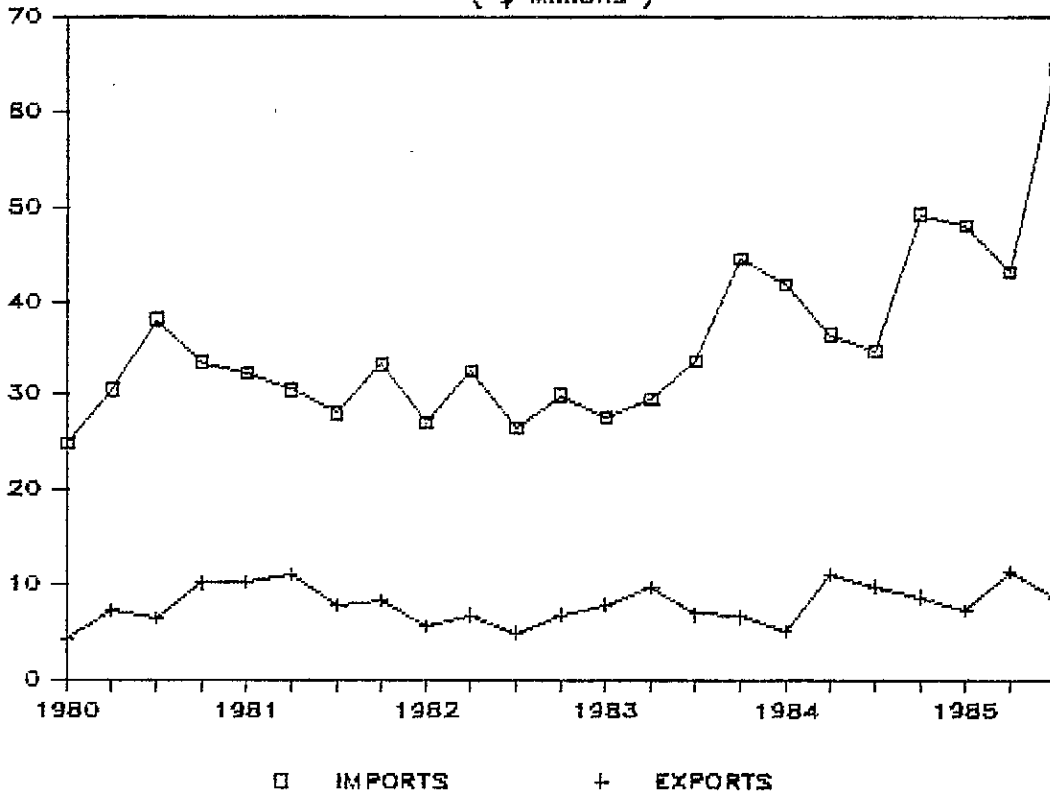
ELECTRONIC COMPUTERS & PTS.

(\$ Billions)



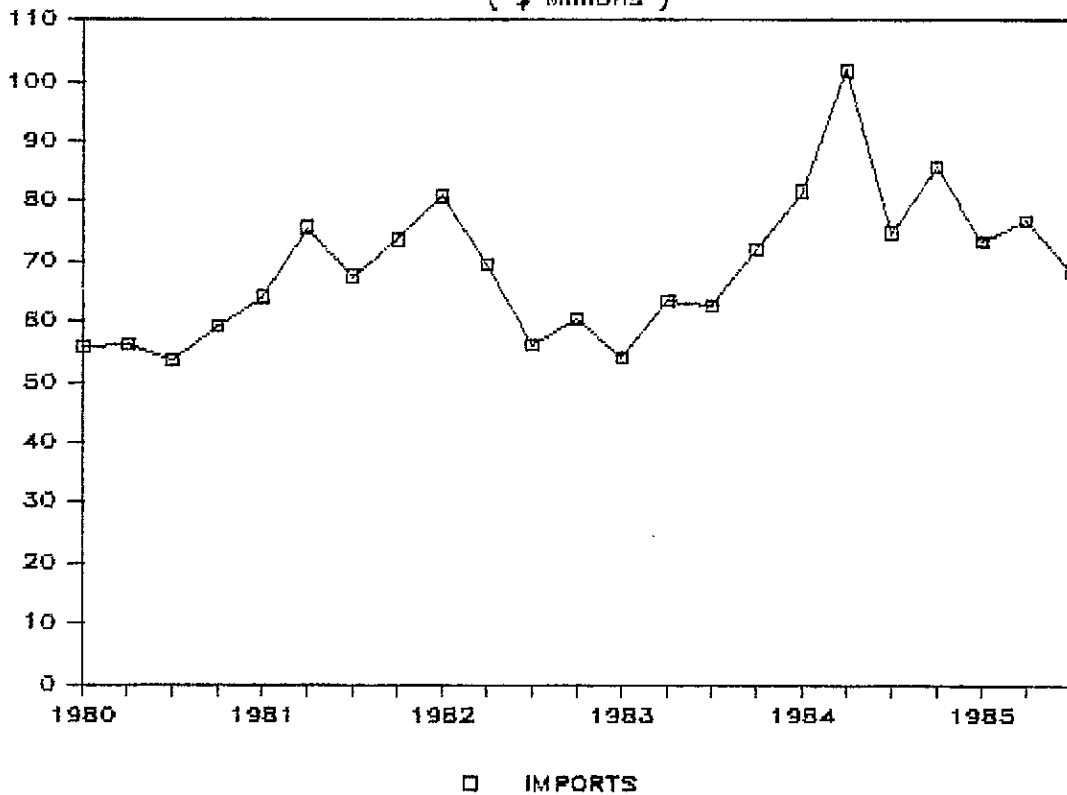
GEOPHYSICAL EQUIP. & PARTS

(\$ Millions)



PHOTOCOPIERS & PTS.(919-47)

(\$ Millions)



HOUSEHOLD ELECTRICAL PRODUCTS

Highlights - Third Quarter, 1985

Industrial Sectors (See Table 6, page 18)

In the third quarter of 1985, Canadian demand (ADM) for household electrical products witnessed an increase of 7.6 per cent, a slight decrease from the second quarter. Exports were down considerably at 17.4 per cent while imports rose by 17.3 per cent, increasing the trade deficit by a substantial 32.5 per cent. Most of the export activity was in the United States in refrigerators, and most of the imports were dishwashers from the U.S.

The small appliance market saw an increase in ADM of 15.2 per cent while shipments increased by 0.9 per cent. The strong second quarter softened slightly as expected. Imports rose by 24.8 per cent, increasing the trade deficit by 28.1 per cent. In spite of this there is a certain note of optimism currently existing in this industry sub-sector. With the present trend of product rationalization and product mandating, strengths are being developed in specific product lines which are helping to reduce imports.

The major appliance industry got off to a slow third quarter in 1985. The ADM was up 2.0 per cent and shipments were down 4.1 per cent while imports were up 6.5 per cent. Exports, however, decreased by 19.3 per cent, increasing the trade deficit by 47.2 per cent. Following the disaster of 1982 the market bounced back in 1983, and 1984 succeeded in sustaining this trend although very tentatively. In 1985 to date, the industry is struggling with an ADM increase of only 1.6 per cent, a 1.9 per cent decrease in shipments and a 23.3 per cent increase in the deficit. Exports were up only 2.2 per cent with imports having increased by 12.5 per cent. This is a source of some apprehension to manufacturers, with the GATT tariff rate agreed reduction on major appliances from 20 per cent to 12.5 per cent in 1987 coming ever closer.

Commodity Exports and Imports (See table 7, page 19)

Trade in refrigerators and freezers in the third quarter indicated a slight weakening in exports compared with the second quarter, showing a decrease of 5.2 per cent while imports increased a more moderate 10.0 per cent, resulting in a trade deficit of 32.4 per cent. This softening trend in export strength, especially in the U.S., should reverse itself. In the area of washing machines, which is normally a volatile market, exports dropped 12.0 per cent while imports decreased a moderate 8.9 per cent. It appears that this market had stabilized, so this must be watched very closely. Principal washing machine imports are from the U.S., approximately 80 per cent, followed by Japan.

TABLE 6
HOUSEHOLD ELECTRICAL PRODUCTS
THIRD QUARTER BY INDUSTRIAL SECTORS

	1985		1984	% Change	
	3rd Qtr	2nd Qtr	3rd Qtr	Qtr	Annual
----- \$ Millions -----					
MAJOR APPLIANCES					
ADM	312	306	307	2.0	1.6
*Shipments	259	270	264	(4.1)	(1.9)
Trade Surplus (Deficit)	(53)	(36)	(43)	47.2	23.3
Exports	46	57	45	(19.3)	2.2
Imports	99	93	88	6.5	12.5
SMALL APPLIANCES					
ADM	266	231	256	15.2	3.9
*Shipments	111	110	117	0.9	(5.1)
Trade Surplus (Deficit)	(155)	(121)	(139)	28.1	11.5
Exports	11	12	10	(8.3)	10.0
Imports	166	133	149	24.8	11.4
TOTAL					
ADM	578	537	563	7.6	2.7
Shipments	370	380	381	(2.6)	(2.9)
Trade Surplus (Deficit)	(208)	(157)	(182)	32.5	14.3
Exports	57	69	55	(17.4)	3.6
Imports	265	226	237	17.3	11.8

SOURCE: Inventories, Shipments and Orders in
Manufacturing Industries - Cat. No. 31-001
Imports by Commodities - Cat. No. 65-007
Exports by Commodities - Cat. No. 65-004
Statistics Canada.

*Shipments - Goods of own mfr. - classified by the 1980 S.I.C.

TABLE 7
HOUSEHOLD ELECTRICAL PRODUCTS
THIRD QUARTER BY COMMODITY EXPORTS AND IMPORTS

	1985		1984	% Change	
	<u>3rd Qtr</u>	<u>2nd Qtr</u>	<u>3rd Qtr</u>	<u>Qtr</u>	<u>Annual</u>
	----- \$ 000 -----				
REFRIGERATORS AND FREEZERS					
Exports	8 735	9 212	8 513	(5.2)	2.6
Imports	10 074	11 194	9 335	(10.0)	7.9
Trade Surplus (Deficit)	(1 339)	(1 982)	(822)	(32.4)	62.9
ELECTRIC WASHING MACHINES AND PARTS					
Exports	1 706	1 938	2 038	(12.0)	(16.3)
Imports	13 589	14 916	11 071	(8.9)	22.7
Trade Surplus (Deficit)	(11 883)	(12 978)	(9 033)	(8.4)	31.6

TABLE 8
HOUSEHOLD ELECTRICAL PRODUCTS
FIRST THREE-QUARTER YEAR BY INDUSTRIAL SECTORS

	<u>1985</u>	<u>1984</u>	<u>% Change</u>
	----- \$ Millions -----		
MAJOR APPLIANCES			
ADM	872	888	(1.8)
Shipments	751	764	(1.7)
Trade Surplus (Deficit)	(121)	(124)	(2.4)
Exports	161	141	14.2
Imports	282	265	6.4
SMALL APPLIANCES			
ADM	709	656	8.1
Shipments	330	308	7.1
Trade Surplus (Deficit)	(379)	(348)	8.9
Exports	34	27	25.9
Imports	413	375	10.1
TOTAL			
ADM	1 581	1 544	2.4
Shipments	1 081	1 072	0.8
Trade Deficit	(500)	(472)	5.9
Exports	195	168	16.1
Imports	695	640	8.6

SOURCE: Inventories, Shipments and Orders in
 Manufacturing Industries - Cat. No. 31-001
 Imports by Commodities - Cat. No. 65-007
 Exports by Commodities - Cat. No. 65-004
 Statistics Canada.

TABLE 9
HOUSEHOLD ELECTRICAL PRODUCTS
FIRST THREE-QUARTER YEAR BY COMMODITY EXPORTS AND IMPORTS

	<u>1985</u>	<u>1984</u>	<u>% Change</u>
	----- \$ 000 -----		
REFRIGERATORS AND FREEZERS			
Exports	27 692	27 957	(0.9)
Imports	29 391	30 621	(4.0)
Trade Surplus (Deficit)	(1 699)	(2 664)	(36.2)
ELEC. WASHING MACHINES AND PARTS			
Exports	5 955	5 892	1.1
Imports	39 188	32 994	18.8
Trade Surplus (Deficit)	(33 233)	(27 102)	22.6

TABLE 10

HOUSEHOLD ELECTRICAL PRODUCTS

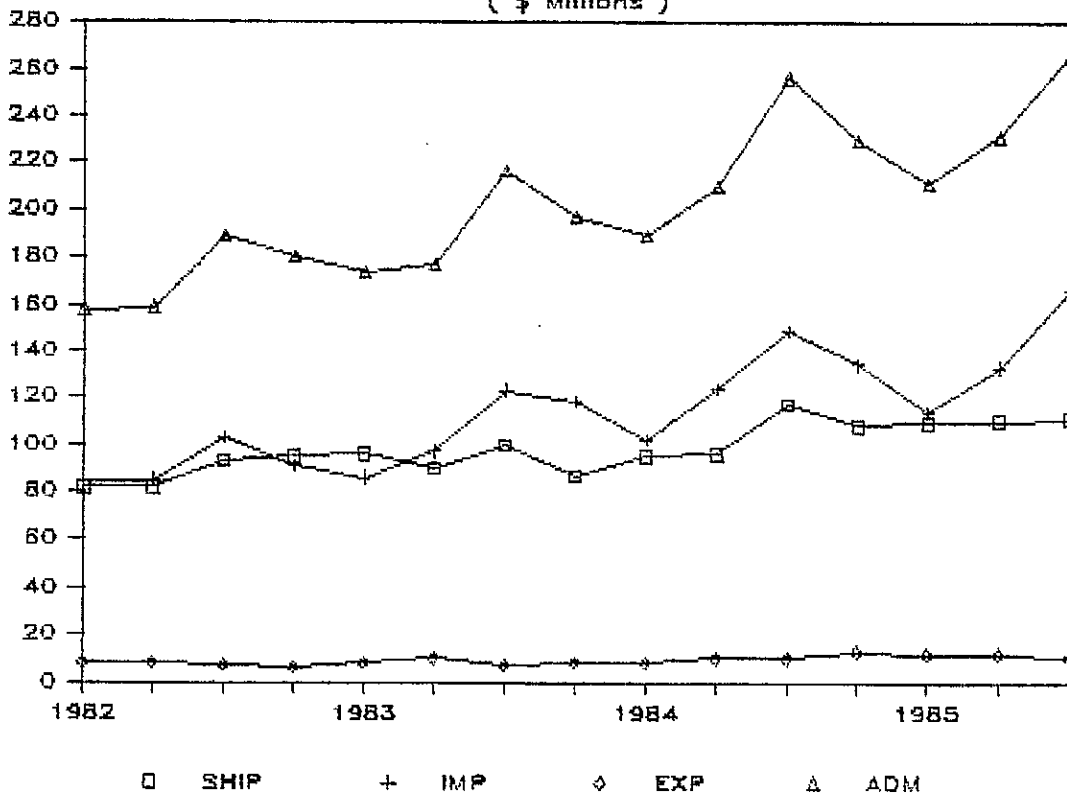
NUMBER OF EMPLOYEES BY INDUSTRIAL SECTORS

<u>INDUSTRIAL SECTORS</u>	<u>NUMBER OF EMPLOYEES</u>	
	<u>As At September 1985</u>	<u>As At September 1984</u>
Major Appliances	8 005	7 735
Small Appliances	3 327	3 752
	<u>11 332</u>	<u>11 487</u>

SOURCE: Employment, Earnings and Hours - Cat. No. 72-002.
Statistics Canada.

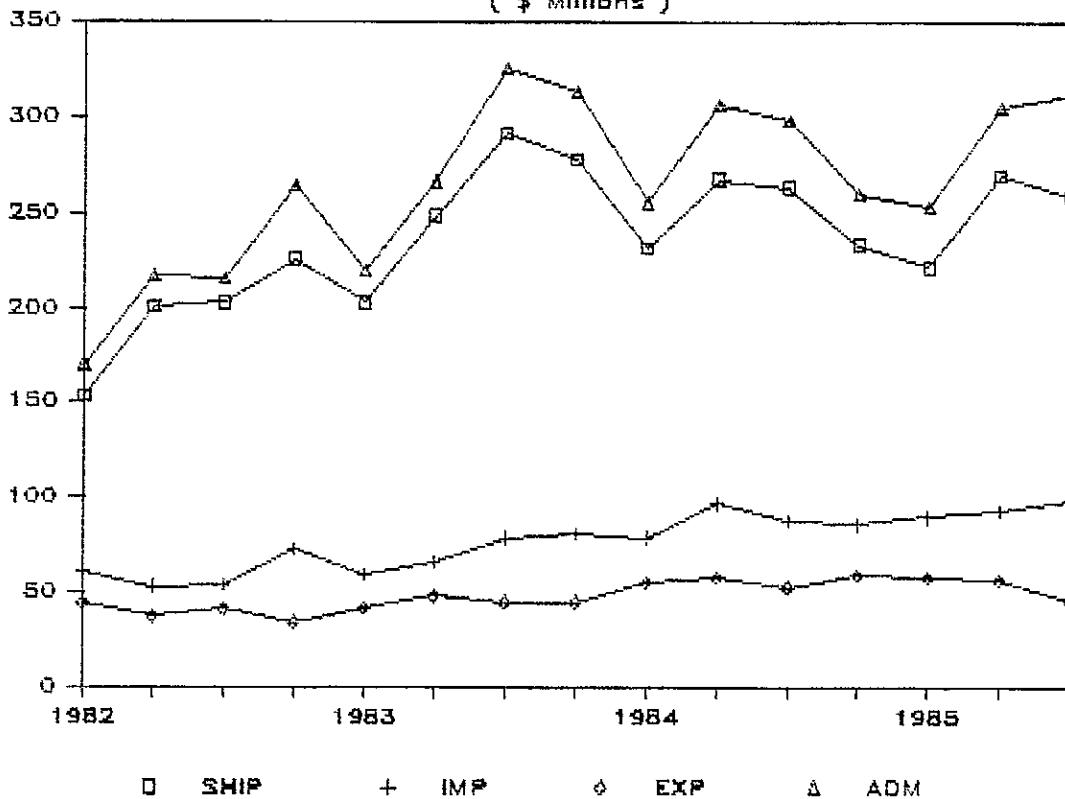
SMALL HHLD. ELECTRICAL APPLIANCES

(\$ Millions)



MAJOR HHLD. ELECTRICAL APPLIANCES

(\$ Millions)



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