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# Canadian Market Opportunities— Import Profile



Government  
of Canada

Regional Industrial  
Expansion

Gouvernement  
du Canada

Expansion industrielle  
régionale

Canada

**POLYESTER FILAMENT FABRICS, 95 PER CENT  
AND OVER, BROAD WOVEN**

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OR

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of this publication.

**REFERENCE SOURCES**

Department of Regional Industrial Expansion  
Statistics Canada  
Revenue Canada  
Supply and Services Canada

**EXPLANATORY NOTES**

**Valuation**

Imports are generally recorded at the values established for customs duty purposes according to the provisions of the Customs Act. Customs values are identical to selling prices for most transactions between non-affiliated firms, but customs values exceed selling prices for many transactions between affiliated firms. All values are reported in Canadian dollars and do not include duty.

**Average Growth Rate**

Growth rates are calculated on the basis of annual compounding.

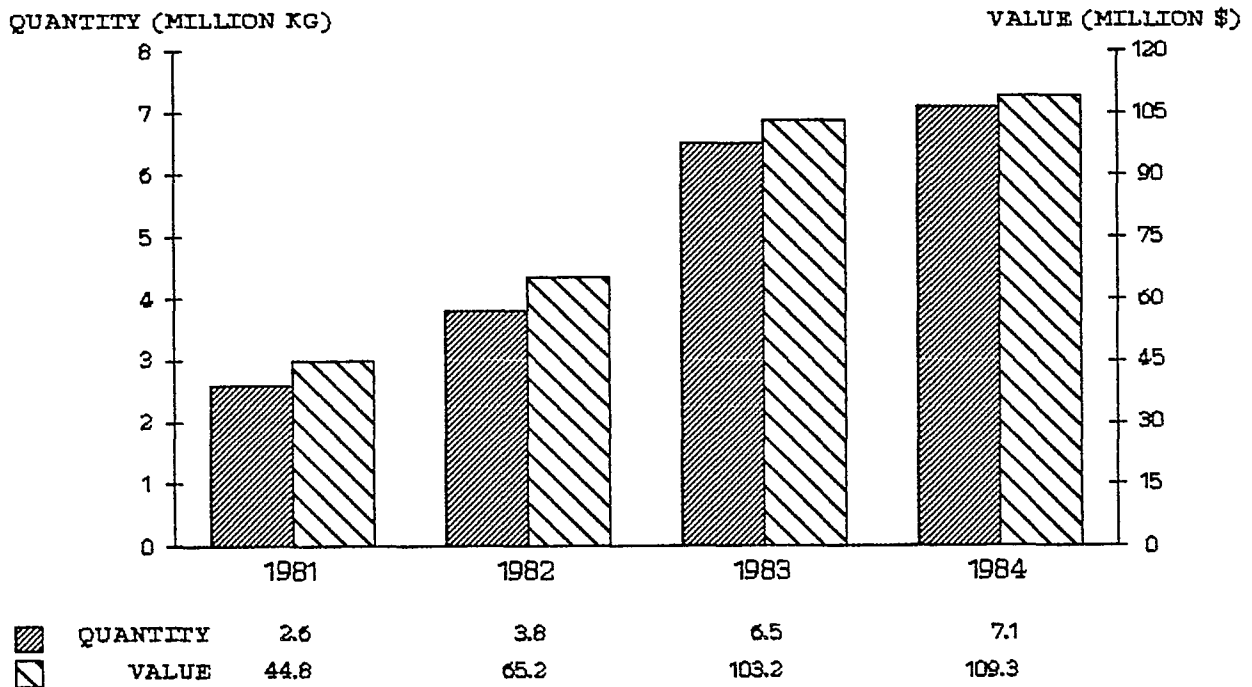
CANADIAN MARKET OPPORTUNITIES - IMPORT PROFILE

POLYESTER FILAMENT FABRICS, 95 PER CENT AND OVER, BROAD WOVEN

INTRODUCTION

This report is one of a continuing series designed to increase business awareness of the potential existing in the Canadian marketplace for domestic production and to stimulate Canadian business to explore further potential market opportunities in Canada. It is important to emphasize that this report does not attempt any assessment as to the feasibility of manufacturing or competing in a particular market and should be treated as an indicator or starting point for the manufacturer or entrepreneur.

A - IMPORT TRENDS  
OF  
POLYESTER FILAMENT FABRICS, 95 PER CENT  
AND OVER, BROAD WOVEN



During the years 1981 to 1984 imports of polyester filament fabrics increased at an average annual rate of 39 per cent in terms of quantity and 35 per cent in terms of dollar value.

**B - IMPORTS BY MAJOR FOREIGN COUNTRY OF EXPORT**  
(BASED ON 1984 FIGURES)

FOREIGN COUNTRY OF EXPORT	1981	1982	1983	1984	UNIT PRICE 1984 \$	AVERAGE	PER CENT
						ANNUAL GROWTH RATE 1981-1984 %	CHANGE 1983-1984 %
<b>JAPAN</b>							
QUANTITY (KG.)	812 247	1 562 809	1 813 638	1 807 497	21.47	31	0
QUANTITY (LB.)	1 790 707	3 445 422	3 998 408	3 984 870	9.74	31	0
VALUE (\$000)	18 661	32 920	37 371	38 803		28	4
<b>UNITED STATES</b>							
QUANTITY (KG.)	1 061 566	1 419 072	2 963 131	3 331 185	11.52	46	12
QUANTITY (LB.)	2 340 364	3 128 535	6 532 620	7 344 044	5.22	46	12
VALUE (\$000)	12 422	17 190	35 735	38 368		46	7
<b>SOUTH KOREA</b>							
QUANTITY (KG.)	399 255	392 804	429 613	549 614	16.03	11	28
QUANTITY (LB.)	880 211	865 989	947 139	1 211 698	7.27	11	28
VALUE (\$000)	6 889	7 325	7 822	8 811		9	13
<b>ITALY</b>							
QUANTITY (KG.)	61 298	145 772	361 409	400 198	15.74	87	11
QUANTITY (LB.)	135 140	321 374	796 775	882 290	7.14	87	11
VALUE (\$000)	1 458	2 684	5 793	6 299		63	9
<b>FRANCE</b>							
QUANTITY (KG.)	186 832	120 629	261 483	329 208	15.79	21	26
QUANTITY (LB.)	411 897	265 939	576 465	725 783	7.16	21	26
VALUE (\$000)	3 308	1 961	4 152	5 198		16	25
<b>OTHER</b>							
QUANTITY (KG.)	98 172	155 324	681 103	688 710	17.14	91	1
QUANTITY (LB.)	216 434	342 436	1 501 592	1 518 354	7.77	91	1
VALUE (\$000)	2 054	3 160	12 359	11 802		79	-5
<b>TOTAL</b>							
QUANTITY (KG.)	2 619 370	3 796 410	6 510 377	7 106 412	15.38	39	9
QUANTITY (LB.)	5 774 753	8 369 695	14 352 999	15 667 039	6.98	39	9
VALUE (\$000)	44 792	65 240	103 232	109 281		35	6

During 1984 imports totalled 7.1 million kilograms valued at \$109.3 million, which was an increase of nine per cent in terms of quantity and six per cent in terms of dollar value from 1983. The average unit price in 1984 was \$15.38 per kilogram.

The United States has been the main supplier in terms of volume, despite falling slightly behind Japan in 1982. Unit prices for exports from the U.S. have consistently been much lower than those for exports from Japan which are mainly higher quality fabrics such as man-made suede.

**C - IMPORT MARKET CONCENTRATION  
(BY % OF TOTAL 1984 VALUE)**

<u>TOP 5 IMPORTERS</u>	<u>TOP 10 IMPORTERS</u>	<u>TOP 25 IMPORTERS</u>	<u>TOP 50 IMPORTERS</u>
16	27	43	57

The 10 major importers accounted for 27 per cent of the total imports for 1984. Of these, eight were identified as manufacturers. Five of the top 10 importers are located in Quebec.

**D - TYPE AND LOCATION OF THE 100 MAJOR IMPORTERS - 1984**

	<u>MANUFACTURERS</u>		<u>WHOLESALEERS</u>		<u>OTHER(1)</u>		<u>TOTAL</u>	
	<u>NO. OF IMPORTERS</u>	<u>VALUE (\$000)</u>	<u>NO. OF IMPORTERS</u>	<u>VALUE (\$000)</u>	<u>NO. OF IMPORTERS</u>	<u>VALUE (\$000)</u>	<u>NO. OF IMPORTERS</u>	<u>VALUE (\$000)</u>
Ontario	20	12 265	13	15 021	4	2 116	37	29 402
Quebec	21	11 537	27	26 744	-	-	48	38 281
Western Provinces	8	6 619	4	1 649	3	3 177	15	11 445
Atlantic Provinces	-	-	-	-	-	-	-	-
<b>TOTAL</b>	<b>49</b>	<b>30 421</b>	<b>44</b>	<b>43 414</b>	<b>7</b>	<b>5 293</b>	<b>100</b>	<b>79 128</b>
Per cent of 1984 Total Value		28%		40%		5%		72%

(1) Includes retailers

There were approximately 828 importers of polyester filament fabrics during 1984. The top 100 importers accounted for \$79.1 million or 72 per cent of the total imports. Of these 100 importers, 44 were identified as wholesalers, representing 40 per cent of the import total, and 49 were identified as manufacturers, representing 28 per cent of the import total. Of these manufacturers 29 firms were identified as follows:

<u>Type of Manufacturers</u>	<u>No. of Importers</u>	<u>1984 Import Value (\$000)</u>
Women's dresses	11	6 852
Women's skirts	5	5 712
Other women's clothing	3	2 038
Men's clothing	7	2 143
Plastic materials	3	3 965

E - CANADIAN PRODUCTION

There are at least nine manufacturers of polyester filament fabrics, including polyester blended into other fabrics. Six of the companies are located in Quebec and three in Ontario. In 1983, the latest year for which data are available, domestic polyester filament fabric producers reported that their shipments (including exports) amounted to \$67.8 million, an increase of 22 per cent from the previous year.

Statistics Canada does not report shipments of polyester filament fabrics by Canadian manufacturers separately, but includes them in the class "All other fabrics". Shipments of this class were \$367.4 million in 1982, the latest year for which information is available. Shipments of broad woven pure man-made fabrics of all types in 1981 were \$178.8 million.

F - EXPORTS

Statistics Canada reports that exports of polyester broad woven fabrics during 1984 amounted to 1.3 million kilograms with a value of \$8.9 million. Exports of polyester filament broad woven fabrics are not reported separately.

G - CANADIAN TARIFFS, 1985

TARIFF ITEM	DESCRIPTION	BY % OF TOTAL VALUE (1984)	TARIFF TREATMENT					
			BRITISH(1) PREFER- ENTIAL TARIFF %	MOST FAVOUR- ED NATION TARIFF %	GENERAL TARIFF %	GENERAL PREFER- ENTIAL TARIFF %	U.K. AND IRELAND %	
	Woven fabrics, wholly or in part of man-made fibres or filaments or of glass fibres or filaments, not containing wool or hair, not including fabrics more than 50 per cent, by weight, of silk:							
56208-01	Woven fabrics, which otherwise would be classified under tariff item 56205-01, for use in the manufacture of clothing (temporary tariff item) 30/06/85 and, per kilogram	70	22.5	22.5	45	-	22.5	
			-	28.7 ¢	88 ¢	-	28.7 ¢	
56209-01	Woven fabrics, which otherwise would be classified under tariff item 56205-01, for use in the manufacture of drapes, curtains, bedspreads, bed comforters, pillow shams and bed skirts (temporary tariff item) 30/06/85 and, per kilogram	14	22.5	22.5	45	-	22.5	
			-	28.7 ¢	88 ¢	-	28.7 ¢	

(1) Excludes U.K. and Ireland

Tariff Arrangements and Foreign Countries of Export:

MOST FAVOURED NATION: JAPAN, UNITED STATES, ITALY, FRANCE  
\*MOST FAVOURED NATION OR GENERAL PREFERENTIAL: SOUTH KOREA

ENQUIRIES CONCERNING TARIFFS SHOULD BE DIRECTED TO THE NEAREST CUSTOMS AND EXCISE OFFICE OR TO:  
TARIFF PROGRAMS  
REVENUE CANADA  
CUSTOMS AND EXCISE  
OTTAWA, ONTARIO K1A 0L5  
TEL: (613) 996-1036

\*NOTE: In order to qualify for General Preferential Tariff treatment a special certificate of origin is required.

H - FEDERAL GOVERNMENT PROCUREMENTS

The Department of Supply and Services reports no federal government purchases of polyester broad woven filament fabrics.

I - MARKET SUMMARY

The apparent Canadian market for polyester fabrics increased by 23.5 per cent in 1983 from the previous year. Rising domestic shipments and imports contributed to the increase. In 1981-1982, this market had declined by nine per cent.

Compared with the apparent market for all man-made fabrics, the increase in polyester fabrics was above average, reflecting the effect of improved business conditions in 1983 and the continuing fashion trend to outerwear garments of polyester blended with cotton fibres.

The share of the market accounted for by domestic shipments rose from 47.5 per cent in 1982 to 48.5 per cent in 1983. The import share fell from 52.5 per cent to 51.5 per cent in the same period.

Just over half of domestic shipments of polyester fabrics continued to be made to the domestic clothing industry (56.3 per cent in 1983). However, the distribution of domestic shipments among downstream users shifted somewhat from apparel to household applications, especially curtains and drapes. Industrial uses including filter and screen production, absorbed some 39.3 per cent of shipments.

The market for polyester fabrics is expected to grow annually at a rate of two per cent to 2.5 per cent over the next few years.

This report was prepared by:

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