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Canadian Market Opportunities— Import Profile



Government
of Canada

Regional Industrial
Expansion

Gouvernement
du Canada

Expansion industrielle
régionale

Canada

BONDED NON-WOVEN FABRICS OVER 12 INCHES WIDE

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These offices are listed on page 8
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.

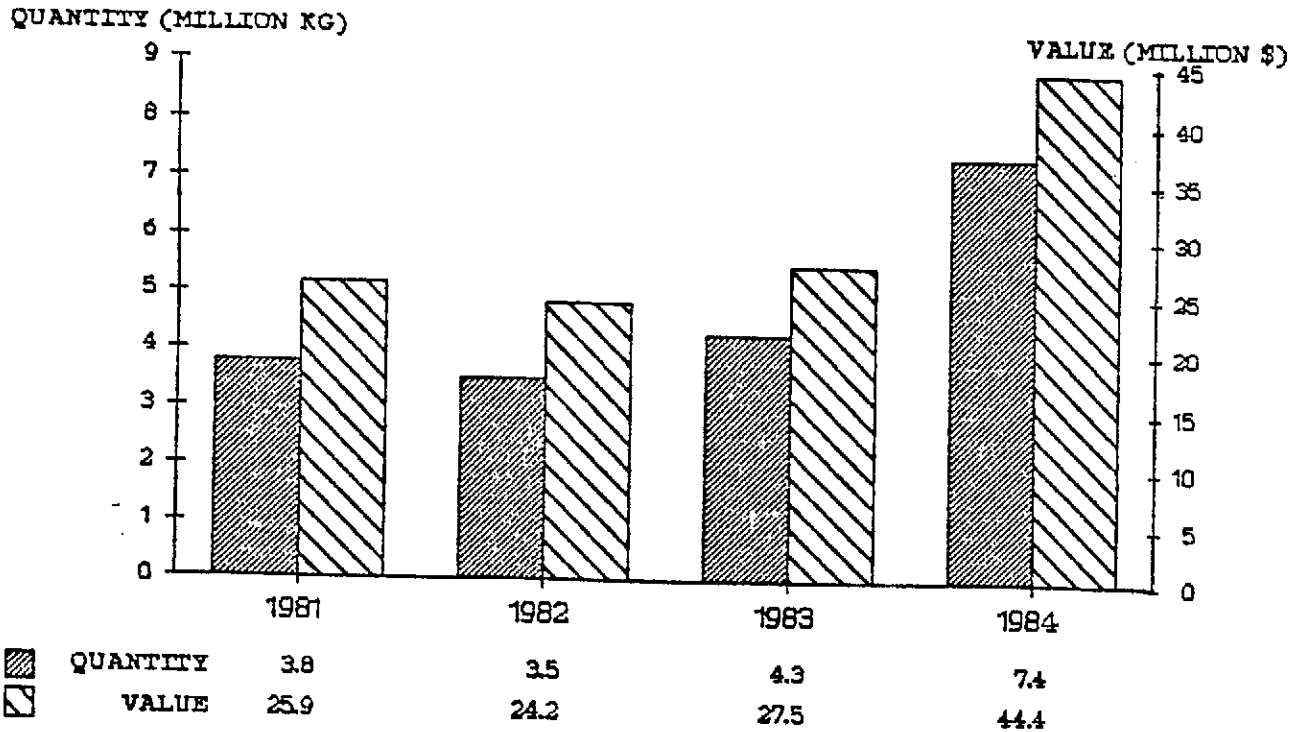
CANADIAN MARKET OPPORTUNITIES - IMPORT PROFILE

BONDED NON-WOVEN FABRICS OVER 12 INCHES WIDE

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
BONDED NON-WOVEN FABRICS
OVER 12 INCHES WIDE



From 1981 to 1984 imports of bonded non-woven fabrics increased at an average annual rate of 25 per cent in terms of quantity and 20 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 %
UNITED STATES							
QUANTITY (KG.)	3 579 876	3 282 917	3 973 041	6 603 551	5.26	23	66
QUANTITY (LB.)	7 892 316	7 237 631	8 759 102	14 558 414	2.38	23	66
VALUE (\$000)	15 018	15 888	20 266	34 716		32	71
JAPAN							
QUANTITY (KG.)	112 515	83 296	59 887	65 061	88.75	-17	9
QUANTITY (LB.)	248 054	183 637	132 028	143 435	40.26	-17	9
VALUE (\$000)	10 117	7 459	5 842	5 774		-17	-1
FRANCE							
QUANTITY (KG.)	11 692	22 254	24 706	219 553	4.22	166	789
QUANTITY (LB.)	25 777	49 063	54 467	484 035	1.92	166	789
VALUE (\$000)	72	168	204	927		134	354
WEST GERMANY							
QUANTITY (KG.)	40 415	60 253	28 153	172 718	4.65	62	513
QUANTITY (LB.)	89 101	132 835	62 068	380 779	2.11	62	513
VALUE (\$000)	312	324	147	804		37	447
NETHERLANDS							
QUANTITY (KG.)	17 797	8 139	99 480	78 750	8.46	64	-21
QUANTITY (LB.)	39 236	17 944	219 318	173 615	3.84	64	-21
VALUE (\$000)	114	123	555	666		80	20
OTHER							
QUANTITY (KG.)	42 671	49 035	78 046	264 967	5.78	84	240
QUANTITY (LB.)	94 073	108 105	172 060	584 155	2.62	84	240
VALUE (\$000)	235	248	456	1 532		87	236
TOTAL							
QUANTITY (KG.)	3 804 966	3 505 894	4 263 313	7 404 600	6.00	25	74
QUANTITY (LB.)	8 388 557	7 729 215	9 399 043	16 324 433	2.72	25	74
VALUE (\$000)	25 868	24 210	27 470	44 419		20	62

During 1984 imports totalled 7.4 million kilograms valued at \$44.4 million, which was an increase of 74 per cent in terms of quantity and 62 per cent in terms of dollar value from 1983. These sharp increases followed three years in which volumes and values had been almost constant, average annual rates of increase being only 6 per cent (quantity) and 3 per cent (value). The average price per kilogram in 1984 was \$6.00. However, prices in 1984 ranged from \$4.22 per kilogram for imports from France to \$88.75 per kilogram for imports from Japan. The high price per kilogram of imports from Japan is accounted for by the specialized and high quality nature of the fabrics.

The United States has consistently been the major exporter to Canada and accounted for 89 per cent of the quantity and 78 per cent of the value in 1984. Previously the U.S. had provided 93 per cent or more of the quantity, but large increases in imports from France and West Germany reduced its share slightly in 1984.

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

<u>TOP 5</u> <u>IMPORTERS</u>	<u>TOP 10</u> <u>IMPORTERS</u>	<u>TOP 20</u> <u>IMPORTERS</u>	<u>TOP 30</u> <u>IMPORTERS</u>
48	65	79	84

The 10 major Importers accounted for 65 per cent of the total Imports for 1984. Eight of these were identified as manufacturers, and two as wholesalers. Five of the top 10 Importers are located in Ontario and five in Quebec.

D - TYPE AND LOCATION OF THE 30 MAJOR IMPORTERS - 1984

	<u>MANUFACTURERS</u>		<u>WHOLESALEERS</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>
Ontario	14	22 737	-	-	14	22 737
Quebec	10 ^(X)	8 199 ^(X)	6 ^(X)	6 298 ^(X)	16 ^(X)	14 497 ^(X)
Western Provinces						
Atlantic Provinces	-	-	-	-	-	-
TOTAL	24	30 936	6	6 298	30	37 234
Per Cent of 1984 Total Value		70%		14%		84%

(X) Quebec and Western Provinces aggregated to preserve confidentiality.

There were approximately 261 Importers during 1984. The major 30 Importers accounted for 84 per cent or \$37.2 million of the total imports. Of the major Importers 24 were manufacturers, their total imports representing 70 per cent of the import total. The majority of these manufacturers are located in Ontario and are mainly manufacturers of textile mill products, chemicals and apparel.

E - CANADIAN PRODUCTION

In addition to pressed felt fabrics the bonded non-woven fabric industry produces fabrics for use in the manufacture of household, institutional and industrial products. The methods of manufacture include needle-punching, and chemical and thermal bonding processes.

There are apparently no manufacturers of spun bonded non-woven fabrics in Canada. This method of manufacture requires substantial capital investment.

F - EXPORTS

Departmental sources indicate that there are apparently little or no exports of bonded non-woven fabrics. Statistics Canada reports that exports of special construction fabrics, not elsewhere specified, during 1984 totalled 8.8 million kilograms valued at \$43.5 million.

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 %
56300-01	Clothing, wearing apparel and articles made from woven fabrics, and all textile manufactures, wholly or partially manufactured, the textile component of which is 50 per cent or more, by weight, of man-made fibres or filaments or of glass fibres or filaments, not containing wool or hair	68	20	25	50	-	25
56330-01	Imitation suede fabrics containing not less than 60 per cent, by weight, of man-made fibres or filaments, valued at not less than \$13.00/M ² , for use in Canadian manufactures. (Temporary tariff item) 30/06/85	13	10	10	20	6.5	10
43877-01	Materials, of a class or kind not made in Canada, for use in the manufacture of passenger automobiles, buses, motor trucks, ambulances or hearses, or chassis therefor, and parts and accessories and parts thereof, except tires and tubes, for all the foregoing. (Temporary tariff item) 30/06/85	8	Free	Free	35	Free	Free

(1) Excludes U.K. and Ireland.

Tariff Arrangements and Foreign Countries of Export:

MOST FAVOUR-ED NATION: UNITED STATES, JAPAN, FRANCE, WEST GERMANY, NETHERLANDS

ENQUIRIES CONCERNING TARIFFS SHOULD BE DIRECTED TO THE NEAREST CUSTOMS AND EXCISE OFFICE OR TO:
 TARIFF PROGRAMS
 REVENUE CANADA
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 OTTAWA, ONTARIO K1A 0L5
 TEL: (613) 996-1038

H - FEDERAL GOVERNMENT PROCUREMENTS

The Department of Supply and Services reports that there are no federal government purchases of bonded non-woven fabrics.

I - MARKET SUMMARY

The apparent Canadian market for non-woven fabrics (including bonded non-woven fabrics) rose by 20.6 per cent from 433 million square metres (518 million square yards) in 1983 to 523 million square metres (625 million square yards) in 1984. Between 1982 and 1983 the market had increased by 4.6 per cent. In 1985 the apparent market and domestic shipments of non-wovens are expected to increase again.

In the medium term, the market for non-woven fabrics for manufactures and consumer products, including personal hygiene articles, is expected to grow at a slow annual rate (1.5 to 2.0 per cent). Noticeably stronger annual growth is expected in the case of the market for non-woven fabrics for the manufacture of industrial products.

This report was prepared by:

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