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IMPORT PROFILE

Investment Opportunities

GRANITE, SHAPED OR DRESSED

Pub. No: 34-85

October 1985



Government
of Canada

Regional Industrial
Expansion

Gouvernement
du Canada

Expansion industrielle
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GRANITE, SHAPED OR DRESSED

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FOR MORE INFORMATION PLEASE CONTACT:

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Tel: (613) 992-4446

OR

The nearest DRIE Regional Office.
These offices are listed on page 9
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

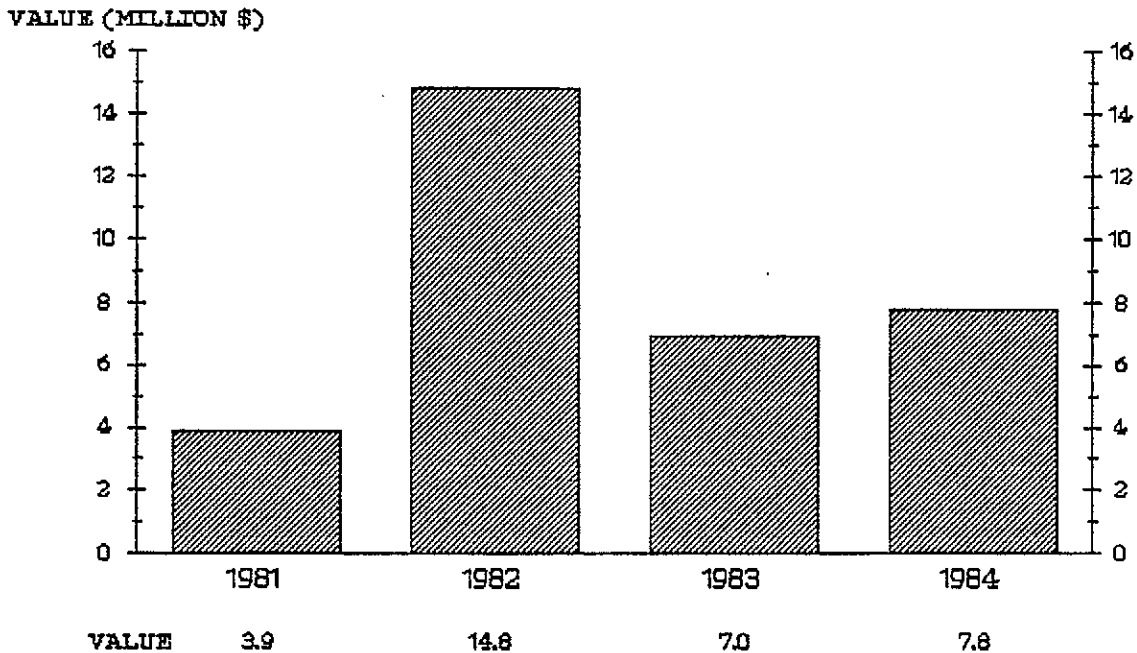
GRANITE, SHAPED OR DRESSED

INTRODUCTION AND SCOPE

This report is one of a continuing series designed to increase business awareness of the potential existing for domestic production and to stimulate Canadian business to further explore potential opportunities in both the Canadian and export markets. 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.

For additional information, statistics on imports of rough granite (import commodity code 276-10) are shown on page five of this report.

IMPORT TRENDS
OF
GRANITE, SHAPED OR DRESSED



Imports of shaped or dressed granite show an upward trend (average annual increase 26 per cent), but there are major year-to-year fluctuations around this trend. Major contracts for specific buildings account for variations in trade figures from year to year.

IMPORTS BY MAJOR FOREIGN COUNTRY OF EXPORT
(IN DESCENDING ORDER OF 1984 VALUES)
GRANITE, SHAPED OR DRESSED

<u>FOREIGN COUNTRY OF EXPORT</u>	<u>1981</u>	<u>1982</u>	<u>1983</u>	<u>1984</u>	<u>AVERAGE ANNUAL GROWTH RATE 1981-1984 %</u>	<u>PER CENT CHANGE 1983-1984 %</u>
UNITED STATES VALUE (\$000)	505	248	1 040	4 869	113	368
ITALY VALUE (\$000)	3 153	14 338	5 629	2 632	-6	-53
THE NETHERLANDS VALUE (\$000)	-	-	-	88	N/A	N/A
SPAIN VALUE (\$000)	-	-	2	86	N/A	4 200
JAPAN VALUE (\$000)	-	-	25	53	N/A	112
OTHER VALUE (\$000)	222	245	256	68	-33	-73
TOTAL VALUE (\$000)	3 880	14 831	6 952	7 796	26	12

N/A - Not applicable

During 1984 the value of imports totalled \$7.8 million, which was an increase of 12 per cent from 1983.

Imports from the United States accounted for 62 per cent (\$4.9 million) of the total value of imports in 1984. This was a sizable increase of 368 per cent in imports from that country in 1983. From 1981 to 1983, Italy accounted for 81 per cent, 97 per cent and 81 per cent of the total import market; but in 1984, its share dropped to 34 per cent.

IMPORTS BY MAJOR FOREIGN COUNTRY OF EXPORT (CONTINUED)
(IN DESCENDING ORDER OF 1984 VALUES)
GRANITE, ROUGH

<u>FOREIGN COUNTRY OF EXPORT</u>	<u>1981</u>	<u>1982</u>	<u>1983</u>	<u>1984</u>	<u>UNIT PRICE 1984</u> \$	<u>AVERAGE ANNUAL GROWTH RATE 1981-1984</u> %	<u>PER CENT CHANGE 1983-1984</u> %
SOUTH AFRICA							
QUANTITY (TONNE)	20 514	13 251	14 349	13 418		-13	-6
VALUE (\$000)	3 583	2 261	2 775	2 390	178	-13	-14
UNITED STATES							
QUANTITY (TONNE)	9 889	4 755	5 765	13 612		11	136
VALUE (\$000)	576	574	881	1 734	127	44	97
INDIA							
QUANTITY (TONNE)	948	1 064	1 203	1 997		28	66
VALUE (\$000)	220	370	169	577	289	38	241
BRAZIL							
QUANTITY (TONNE)	-	-	1 591	1 334		N/A	-16
VALUE (\$000)	-	-	157	159	119	N/A	1
ITALY							
QUANTITY (TONNE)	459	2 626	1 154	416		-3	-64
VALUE (\$000)	194	842	342	139	334	-11	-59
OTHER							
QUANTITY (TONNE)	2 468	337	698	678		-35	-3
VALUE (\$000)	229	48	123	101	149	-24	-18
<hr/>							
TOTAL							
QUANTITY (TONNE)	34 278	22 033	24 760	31 455		-3	27
VALUE (\$000)	4 802	4 095	4 447	5 101		2	15
UNIT PRICE (\$)	140	186	180	162			

N/A - Not applicable

NOTE: Quantity in metric tonnes

Imports of rough granite were included for additional information

During 1984, imports of rough granite totalled 31 455 tonnes (increase of 27 per cent from 1983) valued at \$5.1 million (up 15 per cent). Average unit prices range from a low of \$140 to \$186. South Africa accounted for 43 per cent of quantity and 47 per cent of the total value in 1984.

Imports of rough granite are included for additional information (Import Commodity Code 276-10).

**IMPORT MARKET CONCENTRATION
(GRANITE, SHAPED OR DRESSED)
(BY % OF TOTAL 1984 VALUE)**

<u>TOP 5 IMPORTERS</u>	<u>TOP 10 IMPORTERS</u>	<u>TOP 15 IMPORTERS</u>	<u>TOP 20 IMPORTERS</u>
73	87	92	95

The 10 major importers accounted for 87 per cent of the total imports for 1984. Four of these firms were manufacturers of concrete products, except block and brick, or manufacturers of cut stone and stone products. Four were wholesalers (mainly of construction materials) and two were construction firms. Four companies were located in Ontario, three in Quebec and three in the Western Provinces.

**TYPE AND LOCATION OF THE 32 MAJOR IMPORTERS - 1984
(99% OF TOTAL IMPORT VALUE)**

<u>IMPORTER LOCATION</u>	<u>IMPORTER TYPE</u>						<u>TOTAL</u>	
	<u>MANUFACTURERS</u>		<u>WHOLESALEERS AND RETAILERS</u>		<u>OTHER (1)</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	5	5 150	4	203	3	394	12	5 747
Quebec	3*	469*	6	525	-	-	20*	1 942*
Western Provinces			6	543	5	405		
Atlantic Provinces	-	-	-	-	-	-	-	-
TOTAL	8	5 619	16	1 271	8	799	32	7 689
Per Cent of 1984 Total Value		72%		16%		10%		99%

* Quebec and Western Provinces aggregated to preserve confidentiality.

(1) Includes general contractors and special trade contractors.

There were approximately 74 importers of shaped or dressed granite in 1984. The 32 major importers accounted for 99 per cent or \$7.7 million of the total imports. Of these, eight were manufacturers of concrete products, except block and brick, or manufacturers of cut stone and stone products. Imports by these manufacturers represented 72 per cent of the import total. It is estimated that at least \$2.1 million of imports are goods to be re-exported to the United States.

CANADIAN PRODUCTION

There are at least 30 granite quarrying and dressing plants in Canada. Activity is centered mainly in Quebec and Ontario. Statistics Canada reports that in 1983, the latest year for which information is available, shipments of cut, shaped or finished granite amounted to \$33.7 million and shipments of granite monuments, bases and markers, amounted to \$23.4 million.

NOTE: Shipments of granite from Canadian quarries in 1982 were 6.3 million tonnes, with a value of \$49.8 million. Of this, dimensional stone amounted to 70 thousand tonnes with a value of \$7 million. In 1982 most Canadian granite was shipped from Quebec (\$20.4 million), and Ontario (\$17.8 million).

EXPORTS

Statistics Canada reports that exports of natural stone basic products during 1984 amounted to \$28.9 million. Exports of shaped or dressed granite are not reported separately.

CANADIAN TARIFFS, 1985

TARIFF ITEM	DESCRIPTION	BY % OF TOTAL IMPORT VALUE (1984)	TARIFF TREATMENT				
			BRITISH PREFER- ENTIAL TARIFF(1) %	MOST FAVOURED NATION TARIFF %	GENERAL TARIFF %	GENERAL PREFER- ENTIAL TARIFF %	U.K. AND IRELAND %
30520-01	Granite, sawn 01-01-86 01-01-87	42	Free	6.0 5.8 5.5	35	Free	5.5
30715-01	Manufactures of granite, n.o.p. 01-01-86 01-01-87	27	12	12.0 11.1 10.2	40	8	12
30710-01	Granite, n.o.p.	20	12	12	40	8	12
30525-01	Paving blocks of stone	9	Free	6	35	Free	5.5

(1) Excludes U.K. and Ireland
N.O.P. - Not otherwise provided for

Tariff Arrangements and Foreign Countries of Export:

MOST FAVOURED NATION: UNITED STATES, ITALY, THE NETHERLANDS, SPAIN, JAPAN

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) 992-2836

MARKET SUMMARY

In recent years, there has been a trend toward the use of natural stone (including granite) for interior and exterior building facing. This trend has been particularly strong in the United States.

Architects play a major role in decisions on the use of granite in buildings. Many of them have been attracted by the colour, quality and finish of dressed granite. Often the architect will specify custom processing for the facing material.

The Canadian industry has been expanding rapidly because of the large natural resources available, the attractive colours and finishes available and new and improved plant technology. Canadian granite has proven to be competitive with sheet, glass, concrete and other facing materials, both domestically and abroad.

As the Canadian construction industry and architects learn more about the wide variety of Canadian granites and the processing capabilities of our plants, there will be further increased demand. There is also every indication of good potential for competitive import substitution.

This report was prepared by:

The Market Development Branch of
the Department of Regional Industrial Expansion
in collaboration with the Department's
Resource Processing Industries Branch

Pub. No: 34-85

CANADIAN IMPORTERS

Importers of Granite, Shaped or Dressed during 1984 as indicated in this report are listed below in alphabetical order. This list includes all importers with the exception of shipments to individuals and a minimal number of importers whose names were not available.

<u>Name</u>	<u>Address</u>	<u>Name</u>	<u>Address</u>
Accurate Ceramics and Marble, O/B 384064 Ontario Limited	Weston, Ont.	Ideal Monument Works (London) Limited	London, Ont.
Afru Granite Inc.	Beebe, Qué.	Jas H Matthews & Company (Canada) Ltd.	Pittsburg, PA, USA*
Alberta Drywall Supply Calgary a Div. of Alberta Drywall Sup	Edmonton, Alta.	Joe Arban Contractor Ltd.	Ottawa, Ont.
Alberta Marble & Tile Company Ltd.	Calgary, Alta.	L S Starrett Company of Canada Ltd.	Mississauga, Ont.
Aro Canada Inc.	Rexdale, Ont.	Larsens Memorials Ltd.	Winnipeg, Man.
Artex Precast Ltd.	Concord, Ont.	Les Carreux Ramca Ltée	Outremont, Qué.
Barber Monuments Ltd.	St-Catharines, Ont.	Les Carrières Ducharme Inc.	Hemmingford, Qué.
Beer Precast Concrete Ltd.	Scarborough, Ont.	Les Granits Apalaches Inc.	Lac Drolet, Qué.
Belmag Machinery Corporation Ltd.	Coquitlam, B.C.	Les Importations CIOT Ltée	Montréal, Qué.
Blaesing Granite Co.	Vancouver, B.C.	Les Produits de Pierre Granimar Inc.	Montréal, Qué.
Bristol Aerospace Ltd.	Winnipeg, Man.	Link Enterprises Ltd.	Winnipeg, Man.
C & S Ceramic Tile Contractors Ltd.	Burnaby, B.C.	Mafer Inc.	Montréal, Qué.
Cae-Morse Ltd.	Mississauga, Ont.	Morris Rod Weeder Company Ltd.	Yorkton, Ont.
Cana Construction Co. Ltd.	Calgary, Alta.	Muehling Precast & Contracting Ltd.	Kettleby, Ont.
Canadian General Electric Co. Ltd.	Toronto, Ont.	Nelson Monuments Ltd.	Sussex, N.B.
Capitol Marble and Granite Co.	Texas, USA*	PCL Construction Ltd.	Edmonton, Alta.
Ceramican Ltée	Montréal, Qué.	Pratt & Whitney Aircraft of Canada Ltd.	Longueuil, Qué.
Cold Spring Granite (Canada) Ltd.	Lac Du Bonnet, Man.	Purolator Products Ltd.	Mississauga, Ont.
Connolly Contractors Marble Mosaic & Tile Ltd.	Downsview, Ont.	Quadra Stone Company Ltd.	Vancouver, B.C.
Creative Memorials Ltd.	Milton, Ont.	R P S Marble Ltd.	Montréal, Qué.
E & M Precast Ltd.	Rexdale, Ont.	T & V Ceramic Tile Distributors Ltd.	Burnaby, B.C.
Ebco Industries Ltd.	Richmond, B.C.	T M & T Marble Supply Ltd.	Toronto, Ont.
Echlin Canada Inc.	Rexdale, Ont.	Terrazzo Mosaic & Tile Co. Ltd.	Toronto, Ont.
Eden Memorials Ltd.	Winnipeg, Man.	Tierra Sol Ceramic Tile Ltd.	Calgary, Alta.
Erv Parent Company Ltd.	Richmond, B.C.	Tribute Memorials Limited	Regina, Sask.
European Marble & Ceramic Ltd.	St-Léonard, Qué.	Trizec Corporation Ltd.	Calgary, Alta.
Fairmont Granite Ltd.	Beebe, Qué.	University of Victoria	Victoria, B.C.
Gasparini Investments Ltd.	Toronto, Ont.	W R Chandler Memorials Ltd.	Vancouver, B.C.
Gem Campbell Terrazzo & Tile Inc.	Rexdale, Ont.		
Good-Hall Memorials Ltd.	Wynyard, Sask.		
Granicor Inc.	St-Augustin, Qué		
Granit Bussières Incorporé	St-Sébastien, Qué.		
Granit National Ltée	Alma, Qué.		
Graveside Memorial Co. Ltd.	Saskatoon, Sask.		
Highland Granite Company Ltd.	Scarborough, Ont.		
IBM Canada Ltd.	Markham, Ont.		

*non-resident importer

For more information please contact nearest DRIE Regional Office

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