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IMPORT PROFILE

Investment Opportunities

MARBLE, SHAPED OR DRESSED

Pub. No: 43-86

January 1986



Government
of Canada

Regional Industrial
Expansion

Gouvernement
du Canada

Expansion industrielle
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MARBLE, SHAPED OR DRESSED

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FOR MORE INFORMATION PLEASE CONTACT:

Market Information and Analysis Division
Market Development Branch
Department of Regional Industrial Expansion
235 Queen Street
Ottawa, Ontario K1A 0H5
Tel: (613) 992-4446
MINISTÈRE DE L'EXPANSION
INDUSTRIELLE RÉGIONALE

Metal and Minerals Processing Division
Resource Processing Industries Branch
Department of Regional Industrial Expansion
235 Queen Street
Ottawa, Ontario
K1A 0H5
Tel: (613) 992-0717

OR

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

MARBLE, SHAPED OR DRESSED

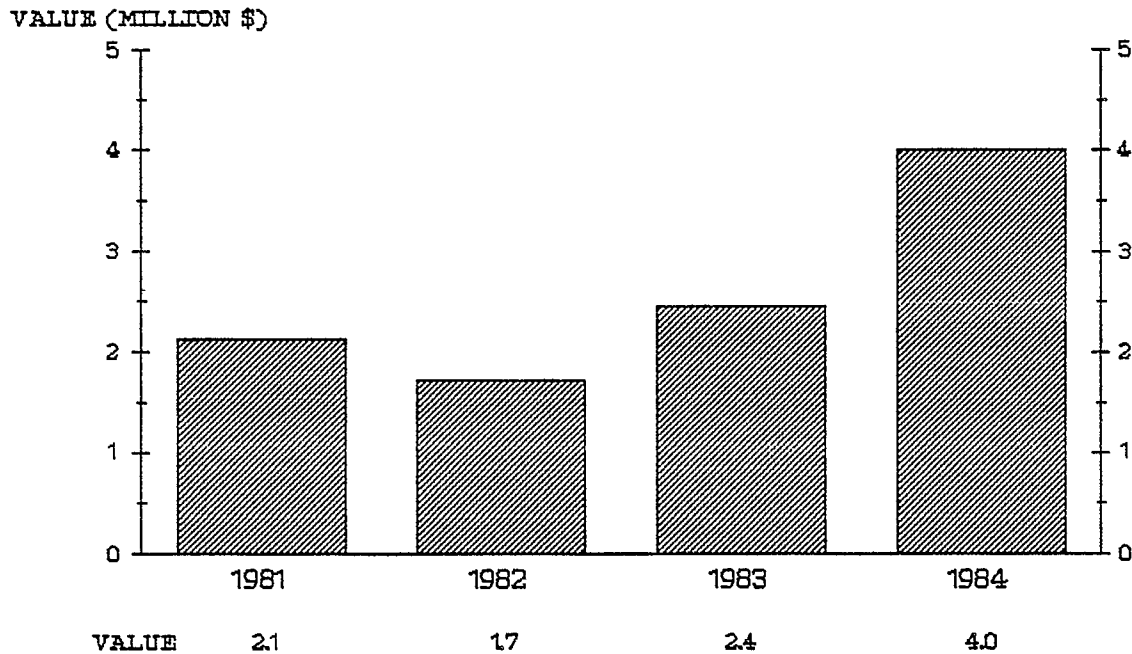
This report is one of a continuing series designed to increase business awareness of the potential existing for domestic production and to stimulate Canadian business to explore potential opportunities in both the Canadian and export markets. It is important to emphasize that this report does not attempt 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.

This import class includes marble for monumental stones, slabs, panels and tiles.

For additional information, statistics on imports of rough marble (Import Commodity Code 276-20) are shown on page 9 of this report, Appendix I.

Information on other natural stone basic products can be found in profile number 34-85, Granite, Shaped or Dressed.

IMPORT TRENDS



Imports of marble, shaped or dressed, dropped by 19 per cent from 1981 to 1982, then grew rapidly by 43 per cent in 1983 and 64 per cent in 1984.

IMPORTS BY MAJOR FOREIGN COUNTRY OF EXPORT

MARBLE, SHAPED OR DRESSED

| Foreign Country of Export | 1981 | 1982 | 1983 | 1984 | Average Annual Growth Rate | Per Cent Change | 6-Month Imports | |
|--------------------------------|--------------|--------------|--------------|--------------|-------------------------------------|--------------------|--------------------|--------------|
| | | | | | 1981-1984 % | 1983-1984 % | 1984 | 1985 |
| ITALY VALUE (\$000) | 1 749 | 1 393 | 1 966 | 3 365 | 24 | 71 | 2 031 | 1 856 |
| UNITED STATES VALUE (\$000) | 171 | 202 | 182 | 207 | 7 | 14 | 91 | 219 |
| PORTUGAL VALUE (\$000) | 112 | 60 | 66 | 119 | 2 | 80 | 61 | 207 |
| SPAIN VALUE (\$000) | 6 | 11 | 72 | 89 | 146 | 24 | 25 | 90 |
| GREECE VALUE (\$000) | 9 | 1 | 13 | 82 | 109 | 531 | 29 | 30 |
| OTHER VALUE (\$000) | 72 | 42 | 146 | 145 | 26 | -1 | 84 | 106 |
| TOTAL VALUE (\$000) | 2 119 | 1 709 | 2 445 | 4 007 | 24 | 64 | 2 321 | 2 508 |

During 1984 the value of imports totalled \$4 million, which was an increase of 64 per cent from 1983.

Imports from Italy accounted for \$3.4 million, or 84 per cent of the total value of imports in 1984. This was an increase of 71 per cent over imports from that country in 1983. The United States was second, accounting for only five per cent of imports.

In the first six months of 1985, imports from the United States and Portugal were much higher than in the corresponding period for 1984. Italy was down slightly in this period, but still dominated.

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

| <u>Top 5</u> <u>Importers</u> | <u>Top 10</u> <u>Importers</u> | <u>Top 15</u> <u>Importers</u> | <u>Top 20</u> <u>Importers</u> |
|----------------------------------|-----------------------------------|-----------------------------------|-----------------------------------|
| 31 | 44 | 54 | 61 |

The 10 top importers accounted for 44 per cent of the total imports for 1984. Five of these firms were construction contractors, and the remainder were either construction material wholesalers or manufacturers of stone, clay, glass or concrete products. Six companies were located in Ontario and three in the Western Provinces.

TYPE AND LOCATION OF THE 57 TOP KNOWN IMPORTERS - 1984
(87% OF TOTAL IMPORT VALUE)

| <u>IMPORTER LOCATION</u> | <u>MANUFACTURERS</u> | | <u>WHOLESALE AND</u> <u>RETAILERS</u> | | <u>OTHER (1)</u> | | <u>TOTAL</u> | |
|---------------------------------|-----------------------------------|--------------------------------|--|--------------------------------|-----------------------------------|--------------------------------|-----------------------------------|--------------------------------|
| | <u>No. of</u> <u>Importers</u> | <u>Value</u> <u>(\$000)</u> | <u>No. of</u> <u>Importers</u> | <u>Value</u> <u>(\$000)</u> | <u>No. of</u> <u>Importers</u> | <u>Value</u> <u>(\$000)</u> | <u>NO. OF</u> <u>Importers</u> | <u>VALUE</u> <u>(\$000)</u> |
| Ontario | 8 | 567 | 11 | 483 | 15 | 764 | 34 | 1 814 |
| Quebec | 3* | 151* | 9 | 636 | 4 | 138 | | |
| Western Provinces | | | 3 | 385 | 4** | 359** | 23*** | 1 669*** |
| Atlantic Provinces | - | - | - | - | | | | |
| TOTAL | 11 | 718 | 23 | 1 504 | 23 | 1 261 | 57 | 3 483 |
| Per cent of 1984 Total Value | | 18% | | 38% | | 31% | | 87% |

* Quebec and Western Provinces aggregated to preserve confidentiality.

** Western and Atlantic Provinces aggregated to preserve confidentiality.

*** Quebec, Western and Atlantic Provinces aggregated to preserve confidentiality.

(1) Includes construction firms.

There were 98 known importers of shaped or dressed marble in Canada. The 57 top known importers accounted for 87 per cent or \$3.5 million of the total imports. Of these, 23 were wholesalers, mainly of construction materials.

CANADIAN PRODUCTION

There are few marble quarrying operations in Canada when compared to other types of building and monumental stone such as granite and limestone. Statistics Canada does not provide data on shipments of shaped or dressed marble from Canadian quarries and processing plants.

EXPORTS

Statistics Canada reports that exports of natural stone basic products including shaped or dressed marble, amounted to \$28.9 million in 1984. Separate export data for marble are not available.

CANADIAN TARIFFS, 1985

| Tariff Item | Description | % of Total Import Value (1984) | TARIFF TREATMENT | | | | |
|----------------|---------------------------------|--|---|--------------------------|---|------------------------|---|
| | | | British Prefer- ential Tariff % | U.K. and Ireland % | Most Favoured Nation Tariff % | General Tariff % | General Prefer- ential Tariff % |
| 30705-01 | Manufacturers of marble, n.o.p. | 52 | 11.1 | 11.1 | 11.1 | 40 | Free |
| | <u>Future Scheduled Rates:</u> | | | | | | |
| | January 1, 1986 | | | | 10.1 | | |
| | January 1, 1987 | | | | 9 | | |
| 30700-01 | Marble, n.o.p. | 40 | 11.1 | 11.1 | 11.1 | 40 | 7 |
| | <u>Future Scheduled Rates:</u> | | | | | | |
| | January 1, 1986 | | | | 10.1 | | 6.5 |
| | January 1, 1987 | | | | 9 | | 6 |

N.o.p. - Not otherwise provided for

NOTE: Rough marble is not included in the above tariffs. It is entered under tariff item 71100-09; Marble, crushed and ground, including marble dust.

Tariff Arrangements and Foreign Countries of Export:

MOST FAVOURED NATION: UNITED STATES, ITALY, GREECE, SPAIN
 MOST FAVOURED NATION OR GENERAL PREFERENTIAL*: PORTUGAL

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

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

MARKET SUMMARY

Identified Canadian marble resources are limited, and marble quarrying operations are not developed to the level of activity in other countries such as Italy. To date, only a few marble deposits in Canada have been developed or proven economically attractive, and as a result, much of the rough marble and fully or partly-finished marble required here is imported. The import market for marble in 1984 amounted to \$7.9 million (marble shaped or dressed \$4 million; rough marble \$3.9 million).

In many cases, marble competes directly with granite and limestone, types of stone in which Canada has excellent resources and highly-developed finishing plants. The demand for marble is strongly influenced by architectural preference in terms of price, colour, quality, delivery, etc. These factors are much the same as the considerations applying to granite and limestone for both exterior and interior building facing.

Import substitution opportunities are of two kinds. First, Canadian suppliers of competing products, such as granite or limestone, could attempt to persuade building developers or architects that their products should be used instead of marble. These efforts could be on a long-term, public-relations basis or by promoting to individual specifiers. The second opportunity is for Canadian producers of marble to compete for orders on individual projects. This would require an active marketing program by the producers.

This report was prepared by:

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

IMPORTS BY MAJOR FOREIGN COUNTRY OF EXPORT

| <u>Foreign Country of Export</u> | <u>MARBLE, ROUGH*</u> | | | | Average Annual Growth Rate | Per Cent Change | 6-Month Imports | |
|--------------------------------------|-----------------------|--------------|--------------|--------------|-------------------------------------|-----------------------|--------------------|--------------|
| | <u>1981</u> | <u>1982</u> | <u>1983</u> | <u>1984</u> | <u>1981-1984</u> % | <u>1983-1984</u> % | <u>1984</u> | <u>1985</u> |
| ITALY VALUE (\$000) | 2 250 | 1 988 | 2 770 | 3 365 | 14 | 21 | 1 663 | 1 097 |
| UNITED STATES VALUE (\$000) | 653 | 1 078 | 492 | 496 | -9 | 1 | 280 | 258 |
| PORTUGAL VALUE (\$000) | 67 | 16 | 21 | 29 | -24 | 38 | 19 | 20 |
| GREECE VALUE (\$000) | - | 28 | - | 13 | N/A | N/A | 13 | - |
| FRANCE VALUE (\$000) | 82 | 150 | 73 | - | N/A | N/A | - | - |
| OTHER VALUE (\$000) | - | 23 | 19 | - | N/A | N/A | - | 16 |
| TOTAL VALUE (\$000) | 3 052 | 3 283 | 3 375 | 3 903 | 9 | 16 | 1 975 | 1 391 |

* Imports of rough marble were included for additional information. This import class includes rough marble for slabs and stones.

N/A - Not applicable

During 1984, imports of rough marble totalled 9 125 metric tonnes (an increase of 11 per cent from 1983) valued at \$3.9 million (up 16 per cent). Italy accounted for 86 per cent of the total value in 1984.

CANADIAN IMPORTERS

Importers of Marble, Shaped or Dressed during 1985 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> |
|---|-----------------------|----------------------------------|---------------------|
| 546942 Ontario Limited (Carrara Marble) | Weston, Ont. | Fords Distributors Ltd. | Vancouver, B.C. |
| 577827 Ontario Ltd. | | Fortress of Louisbourg, | |
| ITAL Marble Div. | Weston, Ont. | Parks Canada | Louisbourg, N.S. |
| Accurate Ceramics and Marble, | | G W Anglin Ltd. | Windsor, Ont. |
| O/B 384064 Ontario Limited | Weston, Ont. | GEM Campbell Terrazzo & Tile | |
| Adige Marmoresina Inc. | Montréal, Qué. | Inc. | Rexdale, Ont. |
| Alberta Drywall Supply Calgary, | | Gasparini Investments Ltd. | Toronto, Ont. |
| Div. of Alberta Drywall Sup | Edmonton, Alta. | Global Marble | Downsview, Ont. |
| Alberta Marble & Tile Company | | Great Lakes Brick & Stone Ltd. | Chatham, Ont. |
| Ltd. | Calgary, Alta. | Hayward & Warwick Ltd. | Saint John, N.B. |
| Allied Agencies | Markham, Ont. | Heritage Memorials Ltd. | Windsor, N.S. |
| Amrams Distributing Ltd. | Rexdale, Ont. | House of Modern (Edmonton 1973) | |
| Avir Ceramiques Inc. | Montréal, Qué. | Ltd. | Edmonton, Alta. |
| B C B International Marketing | | I I L Limited | Weston, Ont. |
| Ltd. | Downsview, Ont. | Iberia Slate Ltd. | Calgary, Alta. |
| Battistelli Ind. Ltd. | Toronto, Ont. | Ideal Monument Works (London) | |
| Bel-Art (1980) Inc. | Montréal, Qué. | Limited | London, Ont. |
| Black & Decker Canada Inc. | Brockville, Ont. | Joe Arban Contractor Ltd. | Ottawa, Ont. |
| C & S Ceramic Tile Contractors | | Kennys Marble Works Ltd. | St. John's, Nfld. |
| Ltd. | Burnaby, B.C. | Kroehler Furniture co. | Durham, Ont. |
| C B Marble Craft Ltd. | Rexdale, Ont. | Kroehler Manufacturing Company | |
| C H Thomas Importers | | Ltd. | Stratford, Ont. |
| Incorporated | Annapolis Royal, N.S. | La Compagnie Moruzzi Ltée | Montréal, Qué. |
| C M G Marble & Granite | | Lakehead Wholesalers Ltd. | Thunder Bay, Ont. |
| O/B 411522 Ontario Ltd. | Rexdale, Ont. | Les Importations Ciot Ltée | Montréal, Qué. |
| Caledonia Marble Co. Ltd. | Toronto, Ont. | Les Produits de Pierre Granimar | |
| Canroc International Corporation | Surrey, B.C. | Inc. | Montréal, Qué. |
| Ceramican Ltée | Montréal, Qué. | Les Trophées Bienvenue Inc. | Longueuil, Qué. |
| Colautti Brothers Marble Tile & | | Marble Granite International | Montréal, Qué. |
| Carpet Inc. | Windsor, Ont. | Marble Masters Inc. | Downsview, Ont. |
| Columbia-Melco Contractors Ltd. | Edmonton, Alta. | Marchesi Marblecraft Ltd. | Burnaby, B.C. |
| Connolly Marble Mosaic & Tile | | Medicine Hat Monumental Co. Ltd. | Medicine Hat, Alta. |
| Ltd. | Downsview, Ont. | Metro Tuile Marbre | Laval, Qué. |
| Customs Marble & Tile Ltd. | Woodbridge, Ont. | New Way Marble & Tile Ltd. | Weston, Ont. |
| D.M. Tile Importing Reg'd | Montréal, Qué. | Olympia & York Developments Ltd. | Toronto, Ont. |
| Denis Leung & Associates Ltd. | Scarborough, Ont. | Olympia Floor & Wall Tile Co., | |
| Diagone Canada Ltée 120815 | | Div. Olympia & York Dev. Ltd. | Toronto, Ont. |
| Canada Inc. | Boisbriand, Qué. | P J Mahal | Vancouver, B.C. |
| Dominion Granite Memorials | Edmonton, Alta. | Packer Brothers Masonry Ltd. | Edmonton, Alta. |
| Dufferin Tile & Carpet Ltd. | Weston, Ont. | Pamar Marbleceramic Ltd. | Weston, Ont. |
| East York Trophies Ltd. | Toronto, Ont. | Parker Brothers Division of | |
| European Marble & Ceramic Ltd. | St-Léonard, Qué. | General Mills Ltd. | Concord, Ont. |
| Ferleo Import Export Co. Ltd. | Toronto, Ont. | Plaza Ontario Marble & Tile Inc. | Windsor, Ont. |
| Fisher Scientific Company Ltd. | Ottawa, Ont. | Quadra Stone Company Ltd. | Vancouver, B.C. |
| | | R Maconachie & Sons Ltd. | Coldwater, Ont. |

CANADIAN IMPORTERS (Cont'd)

| <u>Name</u> | <u>Address</u> |
|--|-------------------|
| R P S Marble Ltd. | Montréal, Qué. |
| Robert J. Booth & Company Limited | Thornhill, Ont. |
| Ron Engineering and Construction | Ottawa, Ont. |
| Self Arts Studio Ltd. | Toronto, Ont. |
| Selfa Arts Studio Ltd. | Toronto, Ont. |
| Sheaffer Pen Co., Div. of Textron Canada Ltd. | Goderich, Ont. |
| St. John's Trophies Limited | Mississauga, Ont. |
| Sterling Tile Co. | Downsview, Ont. |
| Terrazzo Mosaic & Tile Co. Ltd. | Toronto, Ont. |
| The Chevron Awards Group Ltd. | Brampton, Ont. |
| The Marble Shop | Hamilton, Ont. |
| The Mold Warehouse Inc. | Willowdale, Ont. |
| Tierra Sol Ceramic Tile Ltd. | Calgary, Alta. |
| Tivoli Marble & Ceramics Inc. | Downsview, Ont. |
| Tri-Krete Limited | Weston, Ont. |
| Trizec Equities Ltd. | Calgary, Alta. |
| Unitec Tiles Inc. | Montréal, Qué. |
| United Marble Company | Toronto, Ont. |
| Wilson Trophy Co. Inc. | Mississauga, Ont. |
| World Mosaic Incorporated | Montréal, Qué. |
| York Marble Tile & Terrazzo Ltd. | Toronto, Ont. |

DRIE REGIONAL OFFICES

For more information please contact the nearest DRIE Regional Office.

Newfoundland
P.O. Box 8950
Parsons Building
90 O'Leary Avenue
St. John's, Newfoundland
A1B 3R9
Tel: (709) 772-4866

Prince Edward Island
P.O. Box 1115
Confederation Court Mall
134 Kent Street, Suite 400
Charlottetown, Prince Edward Island
C1A 7M8
Tel: (902) 566-7410

Nova Scotia
P.O. Box 940, Station M
1496 Lower Water Street
Halifax, Nova Scotia
B3J 2V9
Tel: (902) 426-3458

New Brunswick
P.O. Box 1210
Assumption Place
770 Main Street
Moncton, New Brunswick
E1C 8P9
Tel: (506) 857-6411

Québec
C. P. 247
Tour de la Bourse
800, Place Victoria, Bureau 3800
Montréal (Québec)
H4Z 1E8
Tel: (514) 283-5938

Ontario
P.O. Box 98
1 First Canadian Place, Suite 4840
Toronto, Ontario
M5X 1B1
Tel: (416) 365-3775

Manitoba
P.O. Box 981
330 Portage Avenue
Room 608
Winnipeg, Manitoba
R3C 2V2
Tel: (204) 949-2300

Saskatchewan
Canada Building
6th Floor, 105-21st Street East
Saskatoon, Saskatchewan
S7K 0B3
Tel: (306) 975-4318

Alberta
Cornerpoint Building
10179 - 105th Street, Suite 505
Edmonton, Alberta
T5J 3S3
Tel: (403) 420-2944

British Columbia
P.O. Box 49178
Bentall Postal Station
Bentall Tower IV
1101 - 1055 Dunsmuir Street
Vancouver, British Columbia
V7X 1K8
Tel: (604) 661-2220

Yukon
Suite 301
108 Lambert Street
Whitehorse, Yukon
Y1A 1Z2
Tel: (403) 668-4655

Northwest Territories
P.O. Bag 6100
Precambrian Building
Yellowknife, Northwest Territories
X1A 1C0
Tel: (403) 920-8668 or 920-8671