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IMPORT PROFILE

Investment Opportunities

RUBBER BELTS AND BELTING, V-TYPE

Pub. No: 48-86

March 1986



Government of Canada

Regional Industrial Expansion

Gouvernement du Canada

Expansion industrielle régionale



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RUBBER BELTS AND BELTING, V-TYPE

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FOR MORE INFORMATION PLEASE CONTACT:

Market/Information and Analysis Oivision Market/Devenopment/Branch////// Department of Regional Industrial Expansion 235 Queen Street Ottawa, Ontario

BIGL PAPAGERICE 16 : 19T MINISTERE DE L'EXPANSION INDUSTRIELLE REGIONALE NO

Plastics, Rubber and Chemical Specialties Oivision Resource Processing Industries Branch Oepartment of Regional Industrial Expansion 235 Queen Street Ottawa, Ontario K1A OH5

Tel: (613) 996-7085

OR

The nearest ORIE Regional Office.
These offices are listed on the last page of this publication

REFERENCE SOURCES

Oepartment 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.

Rounding

Due to rounding, sum of figures may not equal total.

PUB. NO: 48-86 IMPORT COMMODITY CODE - 321-15

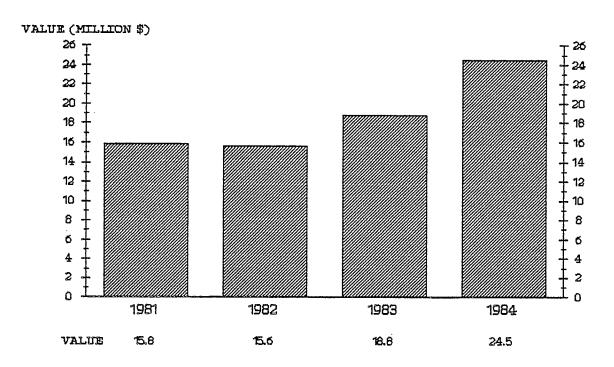
CANADIAN MARKET OPPORTUNITIES - IMPORT PROFILE

RUBBER BELTS AND BELTING, V-TYPE

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.

This import class includes agricultural implement belts (321-15-20), automotive belts (321-15-30), fractional HP (Horse Power) belts (321-15-40), multiple HP belts (321-15-50) and other V-type belts (321-15-90).

IMPORT TRENDS



VALUE OF IMPORTS BY MAJOR FOREIGN COUNTRY OF EXPORT

Foreign Country of Export	<u>1981</u>	<u>1982</u>	<u>1983</u>	<u>1984</u>	Average Annual Growth Rate 1981-1984	Per Cent Change 1983-1984	Im	Month ports to Nov.
UNITED STATES Value (\$000)	12 595	12 888	15 360	19 370	15	26	18 260	13 894
JAPAN Value (\$000)	1 533	1 147	1 225	1 540	0	26 .	1 455	1 420
TAIWAN Value (\$000)	164	340	528	9 23	78	75	872	606
SINGAPORE Value (\$000)	723	442	604	827	5	37	789	577
UNITED KINGDOM Value (\$000)	145	208	405	518	53	28	482	47 1
OTHER Value (\$000)	642	624	719	1 307	27	82	1 237	1 628
TOTAL Value (\$000)	15 802	15 649	18 841	24 485	16	30	23 095	18 596

From 1981 to 1984, the value of imports of rubber belts and belting, V-type, increased at an average annual rate of 16 per cent. During 1984, the value of imports was \$24.5 million, which was an increase of 30 per cent from 1983.

Overall the value of imports decreased by approximately 19 per cent for the first eleven months of 1985 compared to the first eleven months of 1984.

The United States has consistently been the major exporter to Canada, accounting for 79 per cent of the total value in 1984. Imports from that country increased steadily at an annual average rate of 15 per cent over the four years.

The main categories of belts imported during 1984 were the automotive type which accounted for \$7.1 million while imports of the agricultural type totalled \$4.7 million (See table page 5).

IMPORT DATA TRENDS - IMPORT COMMODITY CODE 321-15

RUBBER BELTS AND BELTING, V-TYPE

<u>Code</u>	Commodity	<u>1981</u>	<u>1982</u>	<u>1983</u>	<u>1984</u>	Average Annual Growth Rate 1981-1984	Major Country of Export 1984 Value (\$000)
321-15-20	Agricultural Value (\$000)	3 484	2 741	3 465	4 669	10	United States 4 351
321-15-30	Automotive Value (\$000)	5 115	5 133	6 020	7 192	12	United States 6 121
321-15-40	Fracti on al HP Value (\$000)	285	402	551	581	27	United States 490
321-15-50	Multiple HP Value (\$000)	1 068	714	1 337	1 755	18	United States 1 101
321-15-90	Not Elsewhere Specified Value (\$000)	5 851	6 658	7 467	10 288	21	United States 7 306
TOTAL Value (\$000)		15 802	15 649	18 841	24 485	16	United States 19 369

IMPORT MARKET CONCENTRATION (BY % OF TOTAL 1984 VALUE)

Top 5	Top 10	Top 20	Top 40
<u>Importers</u>	<u>Importers</u>	<u>Importers</u>	<u>Importers</u>
45	67	78	86

The 10 top importers accounted for 67 per cent of the total imports for 1984. Nine of these firms were located in Ontario and one in Alberta. The majority of these top importers were manufacturers.

NOTE: "Top importers" are the known importers with the largest imports by value in 1984.

TYPE AND LOCATION OF THE 60 TOP KNOWN IMPORTERS — 1984 (89% OF TOTAL IMPORT VALUE) MANUFACTURERS WHOLESALERS OTHER (1)

	MANUFACTURERS		WHOLESA	WHOLESALERS OTH		ER (1)T		TOTAL.	
	No. of <u>Importers</u>	Value <u>(\$000)</u>	No. of Importers	Value (\$000)	No. of Importers	Value <u>(\$000</u>)	No. of Importers	Value (\$000)	
Ontario	22	16 548	14	1 473	3	421	39	18 442	
Québec	4*	358*	4	435	2	214	21*	3 445*	
Western Provinces	4^	330^	10	2 382	1	56	21^	3 44D^	
Atlantic Provinces	-	-	-	_		-	<u>-</u> -	_	
TOTAL	26	16 906	28	4 290	6	691	60	21 887	
Per cent of 1984 Total Value		69%		18%		3%		89%	

(1) Includes retailers

There were approximately 830 known importers during 1984. The top 60 importers accounted for 89 per cent or \$21.9 million of the total imports. Of these 60 importers, 26 were manufacturers whose imports represent 69 per cent of the total imports, and 28 were wholesalers whose imports represent 18 per cent of the total imports. Of the 26 manufacturers, nine were manufacturers of non-electric machinery (e.g. farm and construction machinery) with a value of \$6.5 million; seven were manufacturers of motor vehicles and passenger car bodies with a value of \$3.1 million; and six were manufacturers of rubber and miscellaneous plastic products with a value of \$5.8 million. Of 28 wholesalers, 13 were wholesalers in industrial machinery, equipment and supplies with a value of \$2.4 million; and six were wholesalers of automobiles and other vehicles with a value of \$849 000.

Québec and Western Provinces aggregated to preserve confidentiality.

CANADIAN PRODUCTION

There are at least four known Canadian manufacturers of rubber V-type belts. Statistics Canada reports shipments of all types of rubber V-type belts and belting from Canadian plants in 1984 as follows:

<u>Type</u>	Quantity (No.)	Value (\$000)
Fan belts, all types	8 592 611	19 671
Fractional horse-power belts	940 910	1 651
Multiple belts	1 217 043	9 349
Single agricultural belts	328 369	1 551
Other single belts	2 219 209	4 853
Total	13 298 142	37 075

(Also see Market Summary, page 9)

EXPORTS

Statistics Canada reports that exports of all rubber V-type belts and belting during 1984 amounted to \$1.7 million. (Also see Market Summary, page 9.)

CANADIAN TARIFFS, 1985

Tariff Description Total British Favoured Favoured Preferency Prefere			% of	6 of TARIFF TREATMENT						
Tariff Description Value ential U.K. and Nation General ential Company Company			Total			Most				
Item Description C1984 Tariff	T CC		•		11 14 mm.d		0			
Belting, n.o.p., not including single-ply belting wholly of textile fibres 65 7.5 17.5 18.1 27.5 7.5 Future Scheduled Rates: January 1, 1986 January 1, 1987 40956-01 Axles, belts and belting, bolts, brushes, chains, hinges nuts, pulleys, rivets, screes, washers; all the foregoing when for use with the goods entitled to entry under traiff items 40900-01, 40904-01, 40904-01, 40906-01, 40908-01, 40904-01, 40918-01, 40918-01, 40918-01, 40918-01, 40932-01		Description								
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CANADIAN TARIFFS, 1985 - CONTINUED

		% of	TARIFF TREATMENT				
		Total	British	Most	General		
		Import	Prefer-	Favoured	Prefer-		
Tariff		Value	ential	U.K. and Nation Genera	al ential		
<u>Item</u>	Description	(1984)	Tariff	<u> Ireland Tariff Tarif</u>	<u>Tariff</u>		
			a/		a/		

95006-01 All parts, and accessories and parts thereof, except tires, tubes and machines or other articles required under tariff item 43803-01 to be valued separately under the tariff items regularly applicable thereto, when imported for use as original equipment in specified commercial vehicles to be produced in Canada by a manufacturer of specified commercial vehicles

5 Free - Free -

N.o.p. - Not otherwise provided for

Tariff Arrangements and Foreign Countries of Export:

MOST FAVOURED NATION: UNITED STATES, JAPAN, TAIWAN

MOST FAVOURED NATION OR GENERAL PREFERENTIAL OR BRITISH PREFERENTIAL*: SINGAPORE

MOST FAVOURED NATION $\overline{\text{OR}}$ U.K. AND IRELAND: UNITED KINGDOM

ENQUIRIES CONCERNING TARIFFS SHOULD BE DIRECTED TO THE NEAREST CUSTOMS AND EXCISE OFFICE OR TO:

TARIFF PROGRAMS
REVENUE CANADA
CUSTOMS AND EXCISE
OTTAWA, ONTARIO
KIA OL5

TEL: (613) 992-6989

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

MARKET SUMMARY

Information available on the size of the Canadian market for rubber V-belts and belting is as follows:

	Values (\$ 000)					
	1981	<u>1982</u>	1983	1984		
Production (shipments) by Canadian Plants Imports	31 833 15 802	28 922 15 649	29 980 18 841	37 075 24 485		
Sub-Total	47 635	44 571	48 821	61 560		
Exports Apparent Domestic Market	1 178 46 457	1 113 43 458	<u>593</u> 48 228	1 665 59 895		
<pre>Import Penetration (Imports/Apparent Domestic Market)</pre>	34.0%	36.0%	39.1%	40.9%		

As the market size dropped in 1982, Canadian production declined but imports were unchanged. In the first year of the ensuing market recovery, Canadian production rose slightly and imports were much higher, while in 1984, both increased substantially. In successive years imports took 34, 36, and 39 and 41 per cent of the market.

The 1984 Canadian production volume was 13.3 million V-belts, up from 11.5 million in 1983.

Fan belts alone accounted for \$19.7 million of the 1984 Canadian production. All this production of fan belts was for automotive and truck applications, of which approximately 85 per cent was for the replacement market and the remainder for original equipment.

There are currently four manufacturers in Canada of rubber V-belts, three of which are owned by United States parent firms. All four have considerable experience and technical competence in the industrial rubber products manufacturing sector in Canada, and specifically in V-belt manufacturing. The four companies in Canada have current technology related to V-belt production either by having access to this technology from their parent organizations, or through their own research and development (R & D) facilities in Canada.

Rubber V-belt manufacturers supply the Original Equipment Manufacturers (OEM) market by dealing directly with automotive, agricultural equipment and machinery manufacturers. The after-market is supplied through the major company retail marketing outlets and major wholesale distributors. Some manufacturers also make V-belts which are sold by large distributors under individual brand names.

Since V-belts and belting for the OEM market are imported into Canada duty-free, manufacturers in Canada have maintained a stronger position with respect to serving the after-market. This scenario is likely to continue.

The Canadian market for V-type rubber belts and belting is dependent upon the automotive, agricultural and appliance industries in particular, as well as all resource and manufacturing industries in general. As the economy improves, the demand for V-belts increases, as also does the opportunity for competitive substitution.

This report was prepared by:

the Market Development Branch in collaboration with the Plastics, Rubber and Chemical Specialties Division, Resource Processing Industries Branch.

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