
Canadian Market Opportunities— Import Profile



Government
of Canada

Regional Industrial
Expansion

Gouvernement
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Expansion industrielle
régionale

Canada^{ca}

SPRAYERS, AGRICULTURAL, NEW

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SPRAYERS, AGRICULTURAL, NEW

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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 companies, but customs values exceed selling prices for many transactions between affiliated companies. 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

Figures may not add due to rounding.

C O N T E N T S

	<u>PAGE</u>
INTRODUCTION AND SCOPE	4
IMPORT TRENDS: OVERVIEW	4
- SPRAYERS, AGRICULTURAL, NEW	
- SPRAYERS AND CROP PROTECTION MACHINERY N.E.S., PARTS OF (APPENDIX A)	9
FOREIGN COUNTRY OF EXPORT	5
- SPRAYERS, AGRICULTURAL, NEW	
- SPRAYERS AND CROP PROTECTION MACHINERY N.E.S., PARTS OF (APPENDIX B)	10
IMPORT MARKET CONCENTRATION	6
TYPE AND LOCATION OF TOP IMPORTERS	6
CANADIAN PRODUCTION	6
EXPORTS	7
CANADIAN DOMESTIC MARKET	7
DEPARTMENT OF SUPPLY AND SERVICES PROCUREMENTS	8
MARKET SUMMARY	8
APPENDIX C - CANADIAN TARIFFS	11
APPENDIX D - CANADIAN IMPORTERS	12
DRIE REGIONAL OFFICES	14

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CANADIAN MARKET OPPORTUNITIES - IMPORT PROFILE

SPRAYERS, AGRICULTURAL, NEW

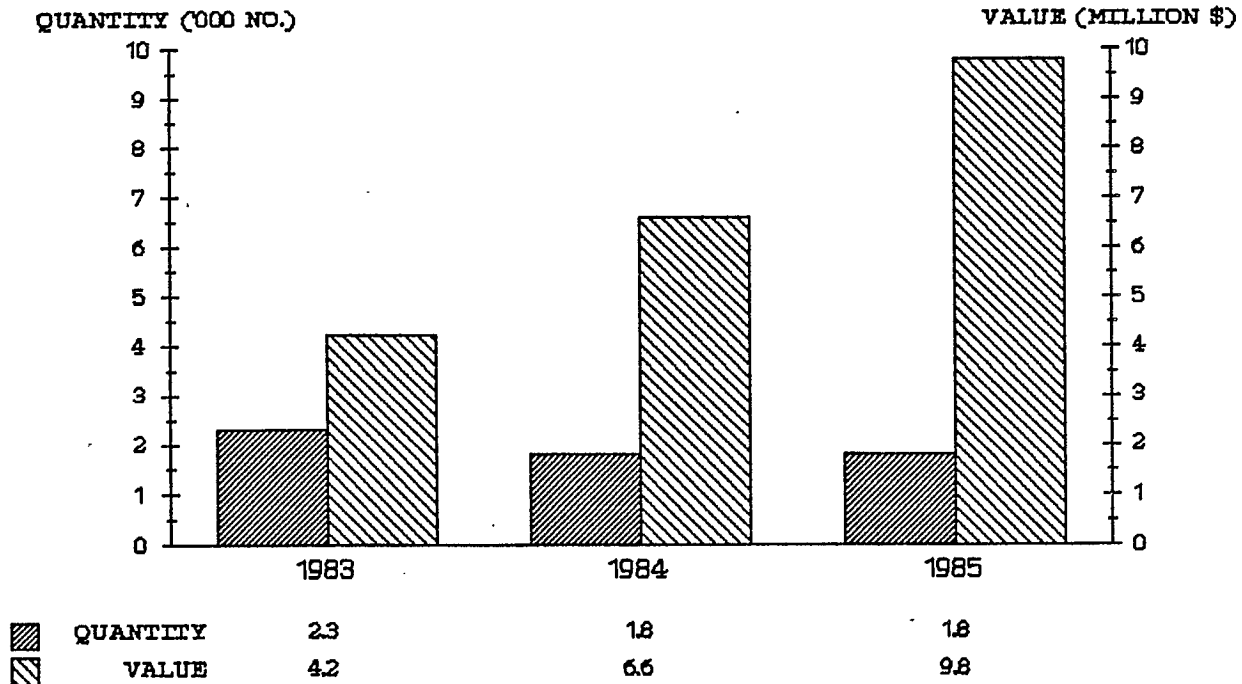
INTRODUCTION AND SCOPE

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.

This report covers imports of Sprayers, Agricultural, New, and Sprayers and Crop Protection Machinery Not Elsewhere Specified, Parts of (Canadian International Trade Classification 542-99-20 and 542-99-88). The principal products covered in this report are agricultural sprayers pulled by a tractor or mounted on a trailer or truck. Parts for sprayers and crop protection machinery have been added for additional information and are included in Appendix A.

Before 1983, the import figures under commodity code 542-99-20 included imports of hand pumps and gasoline powered back-pack sprayers. These smaller sprayers are now included in import commodity code 763-99-90, "House, garden and park equipment, not elsewhere specified."

IMPORT TRENDS: OVERVIEW



From 1983 to 1985, the value of imports of agricultural sprayers, increased from \$4.2 million to \$9.8 million. Imports of parts for sprayers and crop protection machinery have fluctuated from a low of \$11.6 million in 1983 to a high of \$18.3 million in 1984 (See Appendix A).

SPRAYERS, AGRICULTURAL, NEW

IMPORTS BY MAJOR FOREIGN COUNTRY OF EXPORT

Foreign Country of Export	1983	1984	1985	Unit	Average	Per cent
				Price	Annual	Change
				1985	Growth	1984-1985
				\$	Rate	1984-1985
					1983-1985	1984-1985
					%	%
UNITED STATES						
Quantity (No.)	1 516	1 286	1 276		-8	-1
Value (\$000)	3 376	5 502	8 285	6 493	57	51
AUSTRALIA						
Quantity (No.)	40	61	106		63	74
Value (\$000)	188	316	566	5 340	74	79
ITALY						
Quantity (No.)	41	137	178		108	30
Value (\$000)	123	305	380	2 135	76	25
THE NETHERLANDS						
Quantity (No.)	66	68	65		-1	-4
Value (\$000)	249	301	282	4 338	6	-6
FRANCE						
Quantity (No.)	27	41	24		-6	-41
Value (\$000)	140	78	182	7 583	14	133
OTHER						
Quantity (No.)	615	183	106		-58	-42
Value (\$000)	118	127	153	1 443	14	20
TOTAL						
Quantity (No.)	2 305	1 776	1 755		-13	-1
Value (\$000)	4 194	6 629	9 848		53	49
UNIT PRICE (\$)	1 820	3 733	5 611			

During 1985, imports totalled 1 755 sprayers valued at \$9.8 million, a decrease of 1 per cent in quantity and an increase of 49 per cent in dollar value from 1984. The United States has been the dominant source of agricultural sprayers throughout the period, its share of imports being 81 per cent of value in 1983, 83 per cent in 1984, and 84 per cent in 1985.

The average unit price in 1985 was \$5 611. However, unit prices ranged from \$2 135 for imports from Italy to \$7 583 for those from France with an average unit price of \$6 493 for the dominant supplying country, the United States. Unit prices fluctuate due to various models, size, etc. In 1985, the low unit price for "other countries" can be attributed primarily to imports from Hong Kong, Taiwan and the Republic of Germany.

During 1985, imports of parts (See Appendix B) were \$15.9 million, a decrease of 13 per cent from 1984. The United States has dominated the market, with 68 per cent in 1985. The decreasing share of U.S. parts imports has been fully displaced by Denmark, the second largest supplier at 21 per cent of total value.

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>
40	51	61	67

The 10 major importers accounted for 51 per cent of the total imports for 1984. Of these 10, four were manufacturers who accounted for \$2.5 million. Seven of the companies are located in Ontario.

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

TYPE AND LOCATION OF THE 40 TOP KNOWN IMPORTERS - 1984
(71% OF TOTAL IMPORT VALUE)

	<u>MANUFACTURERS</u>		<u>WHOLESALEERS</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	10	2 785	11	618	2	200	23	3 603
Western Provinces	-	-	5	494	6	376	11	870
Québec	-	-	3*	140*	3	116	6*	256*
Atlantic Province	-	-	-	-	-	-	-	-
TOTAL	10	2 785	19	1 252	11	692	40	4 729
Per cent of 1984 Total Value		42%		19%		10%		71%

* Québec and Atlantic Provinces aggregated to preserve confidentiality.
1) Includes retailers

There were 164 known importers of agricultural sprayers during 1984. The top 40 importers accounted for 71 per cent or \$4.7 million of the total imports. Of these 40 importers, 10 were manufacturers whose imports represented 42 per cent of total imports. Six of the manufacturers produce farm machinery and accounted for \$2.2 million of the total imports.

The top three importers of parts in 1984 accounted for 47 per cent of imports and were classified as wholesalers.

CANADIAN PRODUCTION

There are at least 10 manufacturers of agricultural sprayers in Canada. Statistics Canada reports that shipments of spraying and dusting equipment from Canadian plants amounted to \$26.5 million in 1983, the latest year for which information is available. Of this total \$12.1 million were classified as spraying and dusting equipment (mounted trailer type). Production of agricultural sprayers is not reported separately.

EXPORTS

Statistics Canada reports that exports of "crop protection equipment and parts, not elsewhere specified" during 1984 amounted to 2 703 units for a value of \$9.4 million. Exports of agricultural sprayers are not reported separately.

CANADIAN DOMESTIC MARKET

The detailed statistics gathered for this report concentrate on imports of truck and trailer-mounted agricultural sprayers. It may be appropriate to comment on the apparent Canadian market. Based on industry knowledge and extrapolating from the more aggregated 1983 and 1984 figures available, as outlined above, for Canadian production and exports, the Canadian market is roughly approximated as follows.

	<u>Values (\$ Million)</u>	
	<u>1984</u>	<u>1985</u>
Canadian Production (Estimated)	9.3	14.7
Imports	<u>6.6</u>	<u>9.8</u>
Sub-Total	15.9	24.5
Exports (Estimated)	<u>3.0</u>	<u>3.5</u>
Apparent Domestic Market	12.9	21.0
Import Penetration (Imports/Apparent Domestic Market)	51%	47%

DEPARTMENT OF SUPPLY AND SERVICES' PROCUREMENTS

The Department of Supply and Services reports that federal government purchases of sprayers, spreaders and fog applicators (Pest Disease and Frost Control Equipment) during the period April 1983 to March 1984 amounted to \$109 185. For the period April 1984 to September 1985, they purchased \$93,329. Individual figures for sprayers are not available.

NOTE: The above data reflects purchases by the Department of Supply and Services only, and may not include some purchases by other federal government departments.

MARKET SUMMARY

In Canada, there are at least 10 manufacturers of agricultural sprayers. These Canadian manufacturers have maintained a consistent share of the Canadian market for the basic trailer-mounted agricultural sprayers. The average annual Canadian market of multi-rotating head sprayers for agricultural sprayers over the past three years has been \$8 to \$10 million with imports accounting for about 30 to 35 per cent of the market. However, complex multi-rotating-head sprayers have become well accepted in recent years, but none of the Canadian manufacturers have elected to produce such machines.

As in the past, the basic agricultural sprayers are being produced locally with few manufacturers experiencing Canada-wide sales. However, these imported complex sprayers are handled by national distributors who are enjoying nationwide distribution.

Canadian manufacturers of basic sprayers should be encouraged to enter the new market of multi-rotating head sprayers, because they will benefit from duty-free entry to the United States agricultural market.

Dutch and Italian multi-rotating head machines are showing significant gains in the Canadian market. The Canadian or potential Canadian manufacturers of agricultural sprayers could explore potential benefits from entering into an industrial cooperation venture to share the multi-rotating head sprayer technology.

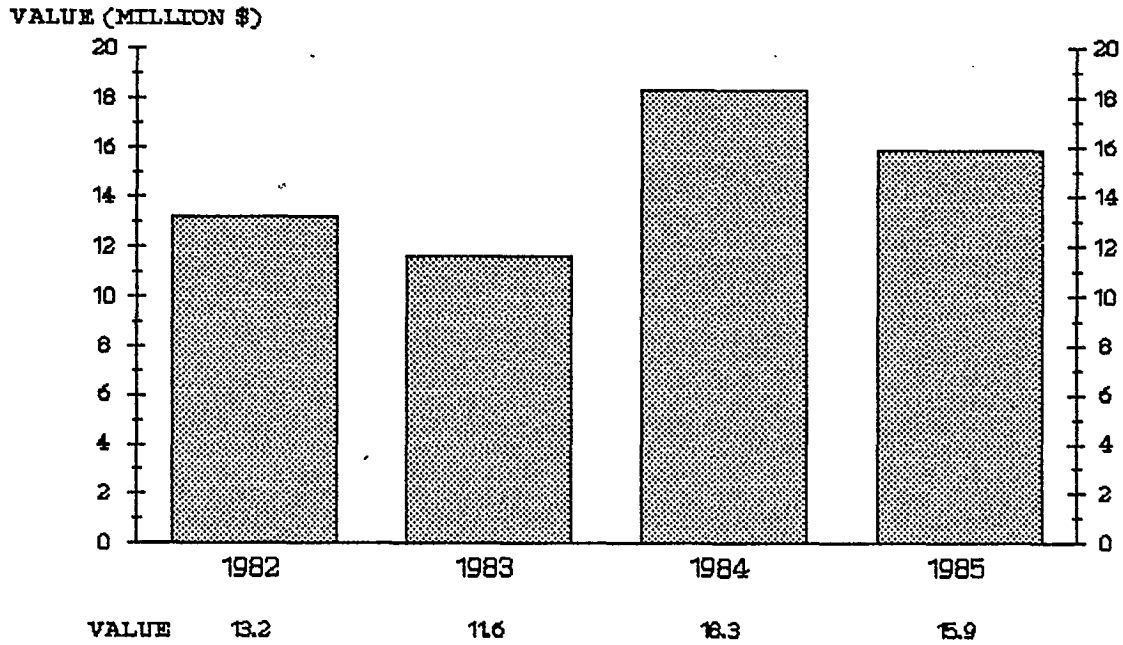
This report was prepared by:

the Market Development Branch
in collaboration with the
Secondary and Service Industries Machinery Division,
Machinery and Electrical Equipment Branch.

DEPARTMENT OF REGIONAL INDUSTRIAL EXPANSION

SPRAYERS AND CROP PROTECTION MACHINERY N.E.S., PARTS OF

IMPORT TRENDS: OVERVIEW



SPRAYERS AND CROP PROTECTION MACHINERY, N.E.S. PARTS OF
IMPORTS BY MAJOR FOREIGN COUNTRY OF EXPORT

<u>Foreign Country of Export</u>	<u>1982</u>	<u>1983</u>	<u>1984</u>	<u>1985</u>	<u>Average Annual Rate 1982-1985 %</u>	<u>Per cent Change 1984-1985 %</u>
UNITED STATES Value (\$000)	10 805	8 680	11 166	10 752	0	-4
DENMARK Value (\$000)	1 115	1 920	5 409	3 405	45	-37
ITALY Value (\$000)	223	412	400	631	41	58
UNITED KINGDOM Value (\$000)	97	363	151	481	71	219
AUSTRALIA Value (\$000)	530	22	680	193	-29	-72
OTHER Value (\$000)	393	231	474	424	3	-11
TOTAL Value (\$000)	13 163	11 628	18 280	15 886	6	-13

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 %
40918-01	Spraying and dusting machines and attachments therefor, including hand sprayers, for agricultural or horticultural purposes; apparatus for the destruction of predatory animals by the discharge of poisonous cartridges and poisonous cartridges for such apparatus; automatic explosive bird-scaring devices; apparatus specially designed for sterilizing bulbs; pressure testing apparatus for determining maturity of fruit; pruning hooks; pruning shears; dehorning instruments; magnets for veterinary use; electric bird-scaring devices, not including recorders or reproducers using magnetizable tape as a recording medium, to be used exclusively for scaring birds by producing sounds simulating their natural alarm cries; parts of the foregoing	88	Free	Free	Free	Free	Free

Tariff Arrangements and Foreign Countries of Export:

MOST FAVOURED NATION: UNITED STATES, ITALY, THE NETHERLANDS, FRANCE, DENMARK
 MOST FAVOURED NATION OR BRITISH PREFERENTIAL: AUSTRALIA

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) 996-6595

CANADIAN IMPORTERS

Importers of Sprayers, Agricultural, New as indicated in this report during 1984 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>
A & M Soil Service Ltd.	Carman, Man.	Consolidated Western Industries Co. Ltd.	Edmonton, Alta.
Abell Waco Ltd.	Rexdale, Ont.	Continental Agencies O/B R. Solom Co. Ltd.	Concord, Ont.
Acklands Ltd.	Vancouver, B.C.	Creek Road Motors Ltd.	Virgil, Ont.
Acklands Ltd.	Winnipeg, Man.	Cyanamid Canada Inc.	Willowdale, Ont.
Acrow-Richmond Ltd.	Rexdale, Ont.	Davey Tree Expert Co. of Canada Ltd.	Weston, Ont.
Ag-Chem Equipment Co. Inc.	Minnneapolis, MN, USA*	Decloet Ltd.	Tillsonburg, Ont.
Agfor Inc.	Plessisville, Qué.	Diversey (Canada) Ltd.	Mississauga, Ont.
Agrico Sales Ltd.	Richmond, B.C.	Duke, G.C. Equipment Ltd.	Burlington, Ont.
Agricultural & Industrial Representatives Ltd.	Kensington, PEI	Dupont Canada Inc.	Mississauga, Ont.
Agriculture Canada	Ottawa, Ont.	Eastern Farm Machinery Ltd.	Guelph, Ont.
Agrospray Chemicals Ltd.	Tillsonburg, Ont.	Eastern Industrial Sales Ltd.	Sydney, B.C.
Airfoil Sprayers Ltd.	Calgary, Alta.	Eastman Fruit Farms Ltd.	Blenheim, Ont.
Airkem of B.C. Ltd.	Vancouver, B.C.	Elgin Farm Supply Ltd.	St. Thomas, Ont.
Alliance RO-NA Home Inc.	Boucherville, Qué.	Equipements H Palardy Inc.	Cte St-Hyacinthe, Qué.
Allied Farm Equipment (Ont.) Ltd.	St. Marys, Ont.	F.E. Myers (Canada) Ltd/Ltée.	Kitchener, Ont.
Altona Farm Service Ltd.	Altona, Man.	Fairway Lawn Equipment Sales & Rentals Ltd.	Windsor, Ont.
Annable Wholesale Nursery Ltd.	Unionville, Ont.	Fallis Turf Equipment Ltd.	Richmond, B.C.
Antler River Equipment	Melita, Man.	Fraser, J.D. Equipment Ltd.	Calgary, Alta.
Apache Seeds Ltd.	Edmonton, Alta.	Gaze Seed Co. Ltd.	St. John's, Nfld.
Artistic Landscape Designs Ltd.	Ottawa, Ont.	Gilbert, George E. Equip. Ltd.	Leamington, Ont.
Asamera Inc.	Calgary, Alta.	Glen-Agri Service Ltd.	Carman, Man.
Asplundh Utility Services Ltd.	Cobourg, Ont.	Good Electric Ltd.	Charlottetown, PEI
Avenue Farm Machinery Ltd.	Abbotsford, B.C.	Government of PEI	Charlottetown, PEI
Bannerman, Gordon Ltd.	Rexdale, Ont.	Greenway Equipment Ltd.	Kamloops, B.C.
Barry's Dairy Centre Ltd.	Huntingdon, B.C.	Grimme Canada	Everett, Ont.
Bertrand Benoit Inc.	Nicolet, Qué.	HIP Enterprises Co.	Pointe-Claire, Qué.
Blumhardt Mfg. Inc.	Minto, Man.	Halifax Seed Co. Ltd.	Halifax, N.S.
Braber Equipment Ltd.	Abbotsford, B.C.	Hardi Inc.	London, Ont.
Breton, Edgar Inc.	Iberville, Qué.	Harry Sharpe & Sons Ltd.	Vancouver, B.C.
Bush Hog Division Allied C.A.M.S. Ltée.	Selma, AL, USA*	Holdings, All W. Ltd.	Foremost, Alta.
Can-Am Farm Supply Ltd.	Sherrington, Qué.	Hurst Equipment Ltd.	Bloomington, Ont.
Canadian Steel Tank Ltd.	Winnipeg, Man.	Inland Horticultural Supplies Ltd.	Calgary, Alta.
Canadian Tire Corp. Ltd.	Winnipeg, Man.	International Harvester Canada	Hamilton, Ont.
Cary's Enterprises	Toronto, Ont.	Interprovincial Turf Ltd.	Innisfail, Alta.
Caschem Chemicals	Winnipeg, Man.	J.E. Lussier Ltée.	Montréal, Qué.
City of Winnipeg	Mississauga, Ont.	J.I. Case Canada Ltd.	Racine, WI, USA*
Clark Equipment of Canada Ltd.	Winnipeg, Man.	Jangl, Otto Co. Ltd.	Montréal, Qué.
Clement Enterprises Ltd.	St. Thomas, Ont.	John Deere Ltd.	Grimsby, Ont.
Co-Op Atlantic	Russell, Man.		
Consolidated Turf Equipment (1965) Ltd.	Moncton, N.B.		
	Winnipeg, Man.		

Canadian Importers (Continued)

<u>Name</u>	<u>Address</u>	<u>Name</u>	<u>Address</u>
Jordan & Ste-Michelle Cellars Ltd.	St. Catharines, Ont.	Salsbury Laboratories Ltd.	Kitchener, Ont.
Joseph Labonté & Fils	Comte Chambly, Qué.	Sanex Chemicals Ltd.	Toronto, Ont.
K.H.D. Canada Inc.	Boucherville, Qué.	Sanfax Industries Ltd.	Dorval, Qué.
Kemsan Inc.	Oakville, Ont.	Simpsons-Sears Ltd.	Toronto, Ont.
Kent Farm Supplies Ltd.	Blenheim, Ont.	Sinclair MacDonald Products Ltd.	Thornhill, Ont.
La Coopérative Fédérée de Québec	Montréal, Qué.	Smale, W.R. & Co. Ltd.	Moosley, Ont.
Lakeview Farm Services Ltd.	Boissevain, Man.	South, George C. Farm Equip. Ltd.	Meaford, Ont.
Laning, Robert H. & Sons Ltd.	Waterford, Ont.	Steamex (Div. of E L B Enterprises)	Burnaby, B.C.
Lau-Rence Liquids Ltd.	Brunkild, Man.	Summers Distributing & Sales	Regina, Sask.
Lawrence & David Ltd.	Burnaby, B.C.	The Professional Gardener Co. Ltd.	Calgary, Alta.
Lee Implement Ltd.	Brandon, Man.	Tidewater Agencies	Vancouver, B.C.
Leigh Metal Products Ltd.	London, Ont.	United Co-operatives of Ont.	Mississauga, Ont.
Leos Sales & Service Ltd.	Argyle, Man.	Valmar Airflo Inc.	Elie, Man.
Les Semences Laval Seeds	Montréal, Qué.	Valmar Mfg. Ltd.	Elie, Man.
M.C.P. Manufacturing Ltd.	Guelph, Ont.	Van Klaveren, Jack Ltd.	St. Catharines, Ont.
MacLeod Stedman Inc.	Winnipeg, Man.	Versatile Farm Equipment Co. Ltd.	Winnipeg, Man.
MacMillan Bloedel Ltd.	Vancouver, B.C.	Vertec Industries Ltd.	Vermilion, Alta.
Maheu & Maheu Inc.	Québec, Qué.	Wallace Construction	Saskatoon, Sask.
Mandem-Industrial Div.	Winnipeg, Man.	Specialties Ltd.	Winona, MN, USA*
Maritime Farm Supply Ltd.	Moncton, N.B.	Watkins Incorporated	Milliken, Ont.
McPhee Enterprises	Islington, Ont.	Weall & Cullen Nurseries Ltd.	Wyoming, Ont.
Milliken Farm Supplies (1977)	Taber, Alta.	Webster, Al Farm Supply Ltd.	Calgary, Alta.
N.M. Bartlett Inc.	Beamsville, Ont.	Westcan Horticultural	Toronto, Ont.
Nature Plus Inc.	St.-Laurent, Qué.	Specialists Ltd.	Red Deer, Alta.
Niverville Feed & Farm Supply Ltd.	Niverville, Man.	Westeel Rosco Ltd.	Calgary, Alta.
Okanagan Turbo Sprayers Ltd.	Penticton, B.C.	Westward Parts Services Ltd.	Saskatoon, Sask.
Oliver Industrial Supply Ltd.	Lethbridge, Alta.	Wheat-Belt Industries (1980) Ltd.	Thedford, Ont.
Ontario Turf Equipment Ltd.	London, Ont.	Wilger Industries Ltd.	Vancouver, B.C.
Pascal J. Inc.	Montréal, Qué.	Willsie Sunnyview Farms Ltd.	Winnipeg, Man.
Peacock Equipment Ltd.	Aldergrove, B.C.	Wine Art Sales Ltd.	
Peavey Industries Ltd.	Red Deer, Alta.	Yetmans Ltd.	
Perron, Gerald Inc.	Chomedey Laval, Qué.		
Phillips Farm Supplies	Brighton, Ont.		
Plant Products Co. Ltd.	Bramalea, Ont.		
Prairie Ag Supply Inc.	Minnedosa, Man.		
Province of New Brunswick	Fredericton, N.B.		
Provincial Government of B.C.	Victoria, B.C.		
R.W. Dewolfe Ltd.	Wolfville, N.S.		
Red Line Chemicals Ltd.	Toronto, Ont.		
Reichhold Ltd.	Mississauga, Ont.		
Reimers Nurseries Ltd.	Yarrow, B.C.		
Richards Packaging Inc.	Vancouver, B.C.		
Richardson Great Northern Mfg. Inc.	Winnipeg, Man.		
Richter, Otto & Sons Equip. Ltd.	Markham, Ont.		
Robinson-Alamo-Sales Ltd.	Winnipeg, Man.		

*non-resident importer

For more information please contact the nearest DRIE Regional Office

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