



IMPORT PROFILE

Investment Opportunities

COMPUTER PLOTTERS

Pub. No: 58-86

May 1986



Government
of Canada

Regional Industrial
Expansion

Gouvernement
du Canada

Expansion industrielle
régionale

Canada

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COMPUTER PLOTTERS

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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 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.

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CANADIAN MARKET OPPORTUNITIES - IMPORT PROFILE

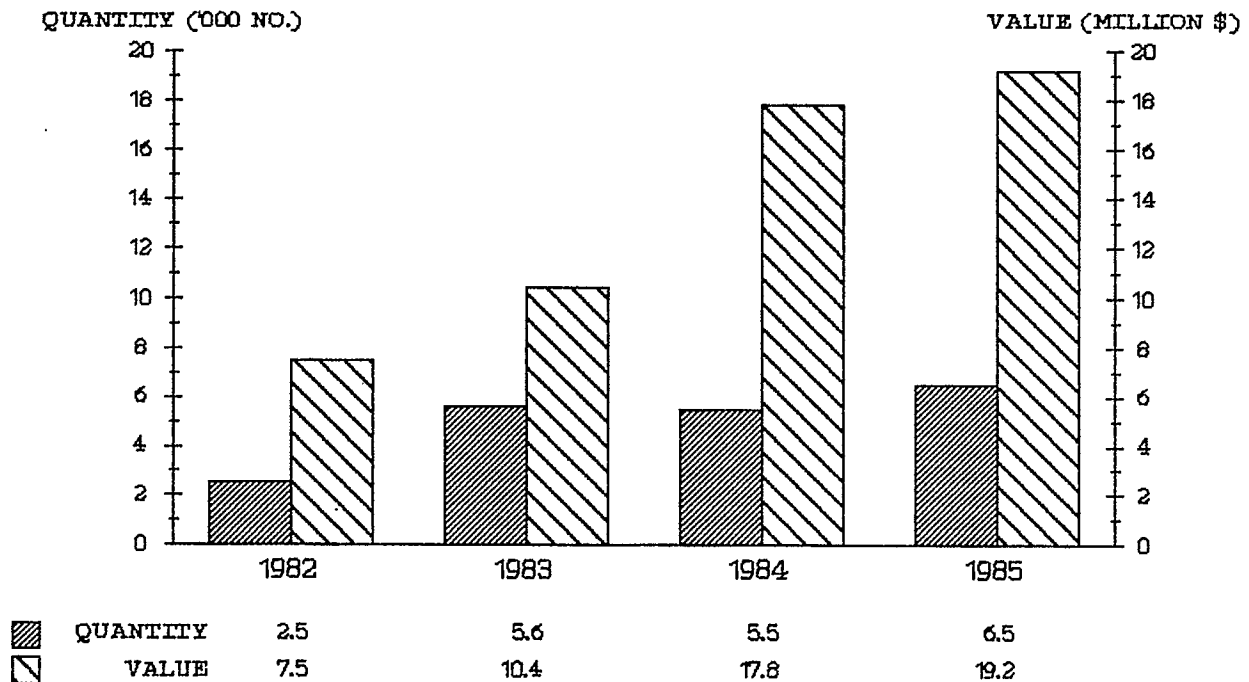
COMPUTER PLOTTERS

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 on-line computer output plotters which have Canadian International Trade Classification code 771-22-66.

IMPORT TRENDS: OVERVIEW



From 1982 to 1985 imports of computer plotters increased at an average annual rate of 38 per cent by quantity and 37 per cent by value, attaining \$19.2 million in 1985.

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>Unit Price 1985</u> \$	<u>Average Annual Growth Rate</u>	<u>Per cent Change</u>
						<u>1982-1985</u> %	<u>1984-1985</u> %
UNITED STATES							
Quantity (No.)	1 349	2 385	5 065	5 438		59	7
Value (\$000)	6 973	9 933	17 469	18 447	3 392	38	6
JAPAN							
Quantity (No.)	1 101	3 186	192	1 067		-1	456
Value (\$000)	136	387	147	683	640	71	365
OTHER							
Quantity (No.)	22	54	218	12		-18	-94
Value (\$000)	381	126	146	90	7 500	-38	-38
<hr/>							
TOTAL							
Quantity (No.)	2 472	5 625	5 475	6 517		38	19
Value (\$000)	7 490	10 446	17 762	19 220		37	8
Unit Price (\$)	3 030	1 857	3 244	2 949			

During 1985 imports totalled 6 517 units valued at \$19.2 million, an increase of eight per cent in value and 19 per cent in quantity from 1984. There is a wide variety of equipment in this group, and the market has broadened into such fields as office automation and computer-aided design and manufacturing.

The effects of these variations show up in various ways. Average unit prices for plotters from the United States have been relatively high (from \$3,400 to \$5,200), showing a moderate decline from 1982 to 1985. From 1982 to 1984 the quantity from the U.S. grew sharply, then levelled in 1985, and the aggregate values followed a similar pattern.

In contrast, Japanese plotters were around \$125 in 1982 and 1983, then averaged roughly \$700 in 1984 and 1985 (still far below the U.S. average of over \$3,000). Volumes from Japan showed enormous swings, from over three thousand (1983) to two hundred (1984). These fluctuations in quantity, unit price, and aggregate values for imports from Japan account for most of the overall price irregularities and much of the movement around the relatively smooth picture that U.S. imports provide for the import totals.

In relative terms, the United States accounted for 96 per cent of the value and 83 per cent of the quantity in 1985, followed by Japan with 3.6 per cent and 16 per cent respectively.

IMPORT MARKET CONCENTRATION
(BY % OF TOTAL 1984 VALUE)

<u>Top 5 Importers</u>	<u>Top 10 Importers</u>	<u>Top 20 Importers</u>	<u>Top 40 Importers</u>
74	81	85	90

The 10 major importers accounted for 81 per cent of the total imports for 1984. Eight of these companies were wholesalers, including four wholesalers of commercial machines and equipment and three of electronic parts and equipment. Nine 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
(90% OF TOTAL IMPORT VALUE)

	<u>MANUFACTURERS</u>		<u>WHOLESALEERS</u>		<u>OTHER</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>	<u>No. of Importers</u>	<u>Value (\$000)</u>
Ontario	11	2 154	11	12 548	3	238	25	14 940
Québec	5*	196*	5*	418*	1	69	7	304
Western Provinces					4	290	8	669
Atlantic Provinces	-	-	-	-	-	-	-	-
TOTAL	16	2 350	16	12 966	8	597	40	15 913
Per cent of 1984 total value		13%		73%		3%		90%

* Québec and Western Provinces aggregated to preserve confidentiality.

There were at least 142 importers of computer plotters in 1984, of whom the top 40 accounted for \$15.9 million or 90 per cent of the total imports. Of these 40 importers, 16 were wholesalers whose total imports represented 73 per cent of the import total. Four of the 16 were wholesalers of electronic parts and equipment, and eight were wholesalers of commercial machines and equipment. The 25 Ontario importers accounted for 84 per cent of the total import value.

CANADIAN PRODUCTION

Seven companies manufacture computer plotters in Canada. Six of the companies are located in Ontario and one in Québec. Statistics Canada does not publish separate production data for this product.

EXPORTS

Statistics Canada does not publish specific export data for computer plotters. They are included in the export commodity class "Electronic computers and equipment."

DEPARTMENT OF SUPPLY AND SERVICES PROCUREMENTS

The Department of Supply and Services reports that its purchases of computer plotters for the federal government during the period April, 1984 to March, 1985 totalled \$371 644 and for the period April, 1985 to March, 1986 totalled \$3,464.

The above data reflect purchases by the Department of Supply and Services only, and may not include direct purchases by other federal government departments.

MARKET SUMMARY

Over the period 1981 to 1984 computer plotters changed from being expensive specialized devices to a wide product line varying greatly over a range of capability and price. Demand is expected to grow as plotters are used widely in the office automation and computer aided design and manufacturing (CAD/CAM) areas, particularly as adjuncts to micro computers.

The dominant supplier is the United States as is the case for the computer sector generally. Much of the United States' volume may be re-exports as the marketing operations of United States' companies sell the products of world-wide subsidiaries.

Both the existing Canadian producers and potential market entrants must be prepared to supply a world market, utilizing the most advanced automated production techniques to assure the manufacture of high quality, cost competitive products.

This report was prepared by:

the Market Development Branch
in collaboration with the
Electronics Directorate
Electronics and Aerospace Branch.

DEPARTMENT OF REGIONAL INDUSTRIAL EXPANSION

CANADIAN TARIFFS, 1986

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 %
41417-01	Electronic data processing machines and apparatus; peripheral equipment for use therewith including data entry, data preparation and data handling machines and apparatus; accessories and attachments for use therewith; parts of all the foregoing; none of the foregoing to include telephone and telegraph apparatus and parts thereof	52	Free	3.9	3.9	25	Free
41417-02	Drum storage memories; disc packs; disc drives; disc files; disc cartridge cleaners; card readers; card punches; card readers/punches; paper tape readers and punches; badge readers and punches; document transport mechanisms; tape to card punches; reproducing punches; printers other than those incorporating keyboards; card or paper tape verifiers; collators; card sorters; process control apparatus which converts analog signals from or to digital signals, the foregoing not to include sensors; card conditioning equipment; parts of the foregoing	41	Free	Free	Free	35	Free

Tariff Arrangements and Foreign Countries of Export:

MOST FAVOURED NATION: UNITED STATES, 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) 992-2623

CANADIAN IMPORTERS

Importers of Computer Plotters 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. Allen Pringle Ltd.	Don Mills, Ont.	Computerland Canada Ltd.	Mississauga, Ont.
A M International Inc.	Scarborough, Ont.	Computerland Sales & Service	Calgary, Alta.
Abex Industries Ltd.	New York, NY, USA*	Computerland of Kelowna	
Ahearn & Soper Inc.	Rexdale, Ont.	O/B Lord Carnelius Computer	Winnipeg, Man.
Albany Engineered Systems Canada Ltd.	Pointe-Claire, Qué.	Computerland of Toronto	
Alberta Government Telephones	Edmonton, Alta.	Div. of B. Olero Investments Ltd.	Toronto, Ont.
All-Steel Canada	Montréal, Qué.	Computerland of Winnipeg	Winnipeg, Man.
Amber Electro Design Ltd.	Montréal, Qué.	Computerlands, O/B 410327 Ont. Ltd.	Burlington, Ont.
Amdek Electronics Canada Ltd.	Richmond, Ont.	Container Graphic Ltd.	Weston, Ont.
American Standard Div. of Wabco Standard Ltd.	Toronto, Ont.	Control Data Canada Ltd.	Mississauga, Ont.
Analytical Instrument Div. of Perkin Elmer Canada Ltée	Montréal, Qué.	Control and Metering Ltd.	Toronto, Ont.
Applied Technology Ventures Canada Ltd.	Scarborough, Ont.	Crazy Irving Inc.	Dollard Des Ormeaux, Qué.
Atelco Inc.	Scarborough Ont.	D G S Computer & Aided Design Systems Inc.	Nepean, Ont.
Atomic Energy of Canada Ltd.	Ottawa, Ont.	Data General (Canada) Ltd.	Mississauga, Ont.
Auto Trol Technology Ltd.	Calgary, Alta.	Datapoint Canada Inc.	Willowdale, Ont.
B & H Computer Enterprises Ltd.	St. John's, Nfld.	Datron Systems Ltd.	Richmond, B.C.
B&G Controls Ltd.	Port Coquitlam, B.C.	Digital Equipment Co. Ltd.	Kanata, Ont.
Baker Production Services (Canada) Ltd.	Calgary, Alta.	Digital Graphics Ltd.	Markham, Ont.
Baroid of Canada Ltd.	Calgary, Alta.	Eastern Computer Centres Ltd.	Halifax, N.S.
Beckman Instruments Inc.	Toronto, Ont.	Electro Rent Corporation	Toronto, Ont.
Bently Nevada Canada Ltd.	Nisku, Alta.	Epitek International Services Inc.	Kanata, Ont.
Bristol Aerospace Ltd.	Winnipeg, Man.	Epson Canada Ltd.	Scarborough, Ont.
Cablesystems Engineering Div. of Canadian Cablesystems (Ont.) Ltd.	London, Ont.	Fahcent Instruments Ltd.	Scarborough, Ont.
Calcomp-Sanders (Canada) Inc.	Downsview, Ont.	Fanshawe College of Applied Arts & Technology	London, Ont.
Canadata Systems Ltd.	Scarborough, Ont.	Fisher Scientific Co. Ltd.	Ottawa, Ont.
Canadian General Electric Co. Ltd.	Toronto, Ont.	Flex Systems Computer Group Ltd.	Vancouver, B.C.
Canadian Marconi Co. Ltd.	Montréal, Qué.	General Motors of Canada Ltd.	Oshawa, Ont.
Candata Systems Ltd.	Markham, Ont.	Genstar Instrument Rentals Ltd.	Vancouver, B.C.
Carl Zeiss Canada Ltd.	Don Mills, Ont.	Genstar Rental Electronics Inc.	Toronto, Ont.
Central Distributors Ltd.	Lachine, Qué.	Geophysical Services Inc.	Calgary, Alta.
Centre de Recherches Industrielles du Québec	Montréal, Qué.	Gerber Camco Inc.	Richardson, TX, USA*
Chevron Industries Inc.	Calgary, Alta.	Gold Fields Canadian Mining Ltd.	Lakewood, CA, USA*
Citation Software Inc.	Winnipeg, Alta.	Gulf Canada Resources Inc.	Calgary, Alta.
Comdye Inc.	Montréal, Qué.	Hecon Canada Inc.	Rexdale, Ont.
Computalog Gearhart Ltd.	Calgary, Alta.	Hewlett-Packard (Canada) Ltd.	Mississauga, Ont.

Canadian Importers (Continued)

<u>Name</u>	<u>Address</u>	<u>Name</u>	<u>Address</u>
Hitech Ltd.	Halifax, N.S.	Sullivan Strong Scott Ltd.	Winnipeg, Man.
IBM Canada Ltd.	Markham, Ont.	Syspro Proven Systems Ltd.	Thornhill, Ont.
ICHI Canada Ltd.	North Vancouver, B.C.	Systemhouse Ltd.	Ottawa, Ont.
Info-Tech Ltd.	Markham, Ont.	TRW Reda Pump Co. of Canada	
Intergraph Systems Ltd.	Calgary, Alta.	a Div. of TRW Canada Ltd.	Calgary, Alta.
International Mobile Data Inc.	Richmond, B.C.	Tandem Computers Canada Ltd.	Markham, Ont.
J R Lee Tool Co. Ltd.	Red Deer, Alta.	Tech-Met Canada Ltd.	Scarborough, Ont.
Jocardi Suits & Coats Ltd.	Montréal, Qué.	Technical Marketing Ass. Ltd.	Mississauga, Ont.
Kajaani Inc. Automation	Pointe-Claire, Qué.	Tektronix Canada Ltd.	Barrie, Ont.
Kimtron Corp. Ltd.	Waterloo, Ont.	Tesdata Systems Canada Ltd.	Mississauga, Ont.
L and J Associates D/B/A		Tessarac Computing Systems Ltd.	Calgary, Alta.
Computerland	Scarborough, Ont.	Texaco Canada Resources Ltd.	Calgary, Alta.
Leasametric (Canada) Inc.	Mississauga, Ont.	The International Nickel	
Leeds & Northrup Canada		Co. of Canada Ltd.	Copper Cliff, Ont.
Div. of General Signal Ltd.	Rexdale, Ont.	The University of Waterloo	Waterloo, Ont.
Linear Technology Inc.	Burlington, Ont.	Transocean Machine Co. Inc.	Montréal, Qué.
Little Princesse	Montréal, Qué.	Tri-Way Machine Ltd.	Windsor, Ont.
Management Graphics Inc.	Toronto, Ont.	Turbo Resources Ltd.	Calgary, Alta.
Massey-Ferguson Industries	Brantford, Ont.	U-Haul Co. of Canada Ltd.	Burlington, Ont.
Megatronix Inc.	Weston, Ont.	United States Instrument	San Francisco, CA,
Metrocan Leasing Ltd.	Montréal, Qué.	Rentals	USA*
Monsanto Canada Inc.	Mississauga, Ont.	Allen Crawford Associates Ltd.	Mississauga, Ont.
Montréal Die Makers Inc.	Montréal, Qué.	University of Saskatchewan	Saskatoon, Sask.
Motorola Canada Ltd.	Willowdale, Ont.	Varian Canada Inc.	Halton Hills, Ont.
N S N Options Ltd.	Oakville, Ont.	Walbar Machine Products of	
NCR Canada Ltd.	Mississauga, Ont.	Canada Ltd.	Cooksville, Ont.
Nicolet Instrument Canada Ltd.	Mississauga, Ont.	Wang Canada Ltd.	Don Mills, Ont.
Northwest Digital Systems Inc.	Richmond, B.C.	Watson Computer Products Inc.	Vancouver, B.C.
Olivetti Canada Ltd.	Don Mills, Ont.	Wescom Canada Div. Rockwell	
Pattison, Jim Sign Co. Ltd.	Scarborough, Ont.	International of Can. Ltd.	Georgetown, Ont.
Peripherals Plus Inc.	Québec, Qué.	Westburne Industrial	
Pirelli Cables Inc.	Montréal, Qué.	Enterprises Ltd.	Montréal, Qué.
Polygraph Technology Inc.	Rexdale, Ont.	White Stag of Canada Ltd.	Edmonton, Alta.
Prime Computer of Canada Ltd.	Mississauga, Ont.	Williams & Wilson Ltd.	Montréal, Qué.
Prince Corin Computer		Williams Brothers Canada Ltd.	Calgary, Alta.
Services Corp.	Winnipeg, Alta.	Xerox (Canada) Inc.	Don Mills, Ont.
Rotalec Enrg.	St. Laurent, Qué		
Saskatchewan Oil & Gas Corp.	Regina, Sask.		
Schlumberger of Canada	Calgary, Alta.		
Seena Consulting Corp.	Ottawa, Ont.		
Sefel Geophysical Ltd.	Calgary, Alta.		
Sheller-Globe of Canada Ltd.	Windsor, Ont.		
Shirtmate Ltd.	Montréal, Qué.		
St. Clair College of Applied			
Arts	Windsor, Ont.		
Stephens Adamson Div. of Allis			
Chalmers Canada Ltd.	Belleville, Ont.		

*non-resident importer

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