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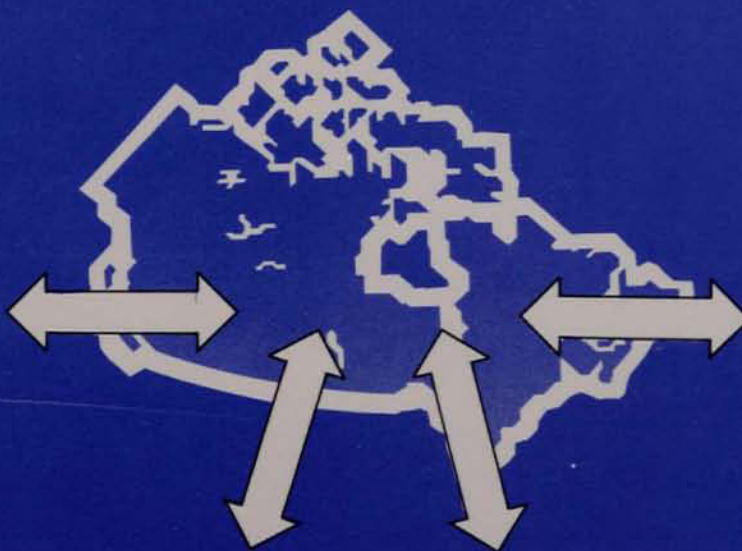
MARKET INTELLIGENCE

**SODIUM SULPHITE CHEMICALS
AND
AMMONIUM THIOSULPHATE**

JANUARY TO JUNE 1989

Pub. No.: 89011-RR

December 1989



Canada



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AND
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OR Industrial Chemicals Division
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Industry, Science and Technology Canada
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REFERENCE SOURCES

Industry, Science and Technology Canada
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Enquiries concerning **Canadian** tariffs should be directed to the nearest Customs and Excise office or to:

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Customs and Excise
Ottawa, Ontario
K1A 0L5
Tel.: (613) 954-6903

Enquiries concerning tariffs and other government trade regulations in **foreign** countries should be directed to:

Info Export
External Affairs
Ottawa, Ontario
K1A 0G2
Tel.: (613) 993-6435 OR
1-800-267-8376

EXPLANATORY NOTES

Commodity Classification

Canadian Trade statistics are classified and published according to the International Convention on the Harmonized Commodity and Description Coding System (H.S.), as defined by the Canadian Customs Tariff and Statistical Nomenclature.

Method

The data shown in this analysis are extracted from Revenue Canada Customs documents. These documents provide a description of the products, names of importers, foreign exporters, quantities, dollar values, unit prices, countries of origin, provinces of entry, tariff applications and rates of exchange.

The information presented in this report is more detailed than that generally available from Statistics Canada or other publications. Data which might reveal information about individual importers are aggregated.

Valuation

Dollar values shown in this report are based on selling price F.O.B. plant, in Canadian dollars. This selling price represents the value paid by the importer, excluding all freight, packing and insurance costs when specified. All trade discounts, when applicable, are also deducted from the selling price.

Rounding

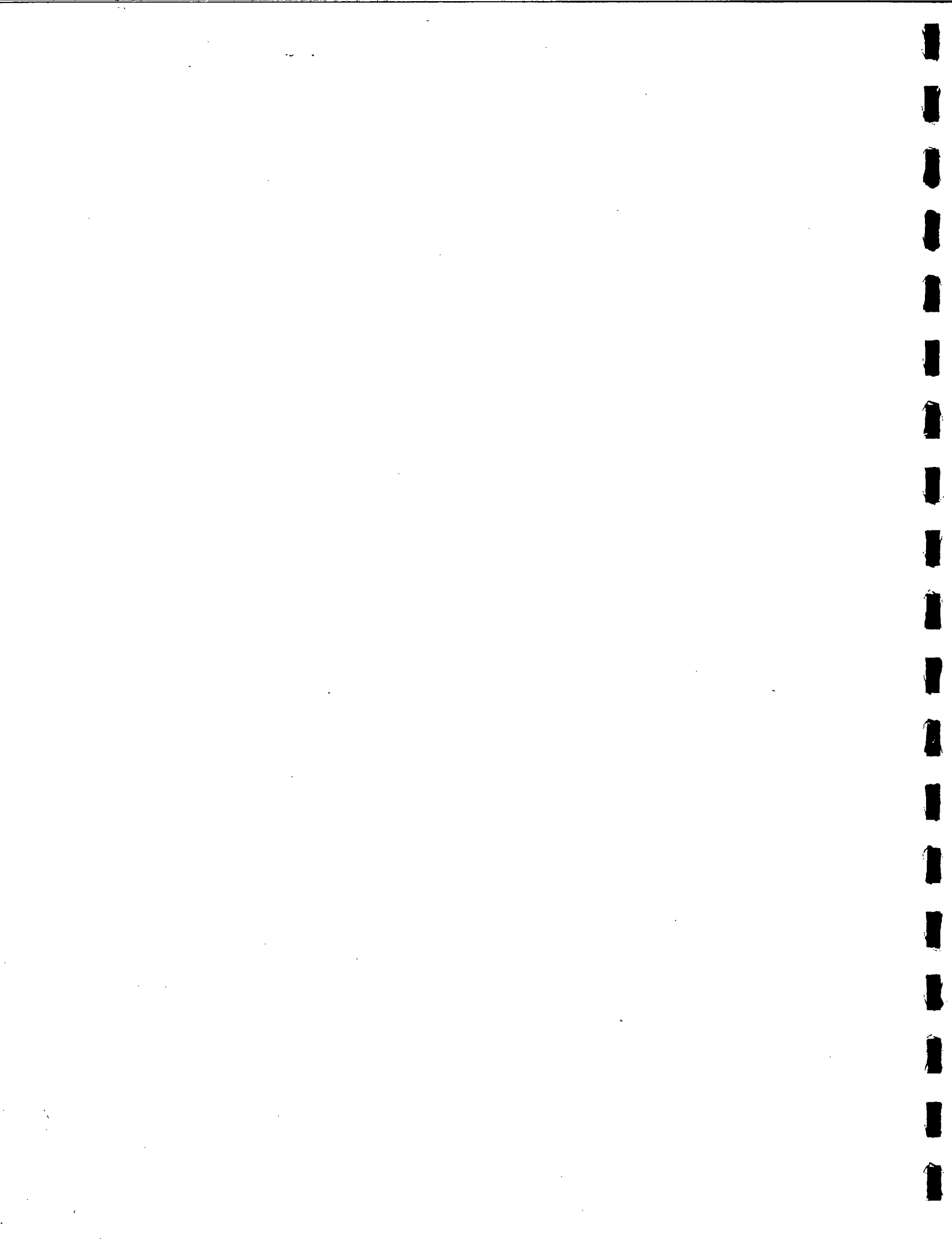
Figures may not add due to rounding.

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IMPORT ANALYSIS
SODIUM SULPHITE CHEMICALS
AND AMMONIUM THIOSULPHATE

I. INTRODUCTION AND SCOPE

This Import Analysis is one of a series prepared in order to assist businesses and other organizations in their market research of specific products. The detailed import information provided in these reports supports studies by organizations seeking to expand existing production lines, change individual product characteristics or engage in new manufacturing investment in Canada. The coverage of an import analysis is developed in close consultation with the client, and is tailored to meet those specific requirements. It is important to emphasize that this report does not attempt any assessment as to the feasibility of competing in a particular market.

This analysis of imports is based on a detailed examination of Revenue Canada Customs import documents for the period of January to June 1989 for the following:

<u>Description</u>	<u>H.S. Commodity Codes Analyzed</u>
Sulphites; thiosulphates (28.32)	
° Sodium sulphites (2832.10.00)	
° Sodium hydrogen sulphite (sodium hydrosulphite)	2832.10.00.10
° Disodium disulphite (sodium metabisulphite)	2832.10.00.20
° Sodium sulphite	2832.10.00.30
° Other thiosulphate (2832.30.90)	
° Ammonium thiosulphate	2832.30.90.90

II. IMPORT TRENDS

Prior to 1988, Canadian import statistics were based on the Canadian International Trade Classification. However, since January 1988, these statistics have been classified and published according to the Harmonized Commodity Description and Coding System (H.S.) developed for International use by the Customs Cooperation Council.

IMPORT TRENDS 1983 - 1987

Prior to 1988*

<u>Commodity Code</u>	<u>Description</u>	<u>January to December</u>					<u>Average Annual Growth Rate %</u> 1983-1987
		<u>1983</u>	<u>1984</u>	<u>1985</u> (\$000)	<u>1986</u>	<u>1987</u>	
403-58-10	Sodium Sulphite	2 041	1 446	1 159	2 503	3 050	10
403-59-21	Sodium Bisulphite	45	455	417	369	326	64
403-59-22	Sodium Metabisulphite	972	1 272	576	849	1 490	11
403-59-30	Ammonium Thiosulphate	422	589	749	757	755	16

Effective 1988

		<u>1988</u> (\$000)	<u>COMPARISON</u> <u>Jan. - June</u>	
			<u>1988</u> (\$000)	<u>1989</u> (\$000)
2832.10.00.10	Sodium Hydrogen Sulphite (Sodium Hydrosulphite)	2 169	1 027	320
2832.10.00.20	Disodium Disulphite (Sodium Metabisulphite)	1 083	445	731
2832.10.00.30	Sodium Sulphite	4 333	1 786	1 990
2832.30.90.90	Ammonium Thiosulphate	<u>996</u>	<u>40</u>	<u>616</u>
		8 581	3 298	3 657 ^(**)

Note: * Figures given for the years prior to 1988 are not necessarily directly comparable to those commencing in 1988.

** Total figures in the following section do not correspond to those above published by Statistics Canada. The differences are explained in Appendix I. The subsequent analysis deals only with the identified imports of \$3.2 million.

III. ANALYSIS OF IMPORTS

JANUARY TO JUNE 1989

Imports for the period January to June 1989 were 215 thousand cwt for a value of \$3.2 million. Sodium sulphite was the dominant type, with 152 thousand cwt (70 per cent) valued at \$2.1 million (66 per cent). Most imports were of a technical grade, followed by photographic and food. Further details by type and grade are shown in Appendix A.

SUMMARY OF IMPORTS BY TYPE

Type	Value		Quantity	
	\$000	%	CWT (000)	%
Sodium Sulphite	2 121	66	152	70
Sodium Metabisulphite	606	19	32	15
Ammonium Thiosulphate	421	13	30	14
Sodium Bisulphite	<u>42</u>	<u>1</u>	<u>2</u>	<u>1</u>
	3 191	100	215	100

Unit prices varied widely. Overall, they can be broken into low/medium/high ranges at per cwt prices of up to \$15, over \$15 to \$25, and over \$25.

Sodium sulphite had over half its volume in the lowest range and over half its value in the middle range. There was also 4.4 thousand cwt with unit price over \$30 per cwt.

Over half the sodium metabisulphite, by both weight and value, was priced between \$20 and \$25 per cwt.

Sodium bisulphate was largely priced below \$22 per cwt.

As for ammonium thiosulphate, almost half was priced in the range of \$10 to \$15 per cwt. Over half of the value was in the \$10 to \$20 per cwt range.

For more details on imports by type and price range, see Appendix B.

III. ANALYSIS OF IMPORTS (Cont'd)

JANUARY TO JUNE 1989

By importer type, imports to wholesalers accounted for \$1.8 million or fifty-six per cent. These were followed by imports to manufacturers with \$1.1 million or thirty-five per cent. Further details on imports of sulphite chemicals by importer type are shown in Appendix C.

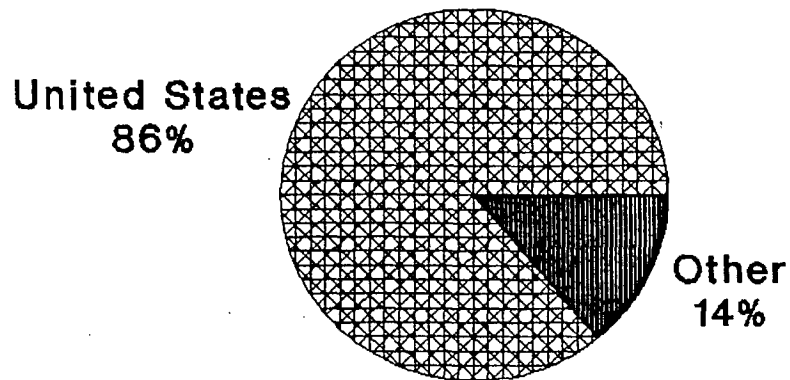
SUMMARY OF IMPORTS BY IMPORTER TYPE

<u>Importer Type</u>	<u>Value</u> (\$000)	<u>% of Total Value</u>
Wholesale	1 770	56
Manufacturing	1 111	35
Other	<u>310</u>	<u>9</u>
TOTAL	3 191	100

III. ANALYSIS OF IMPORTS (Cont'd)

BY COUNTRY OF ORIGIN

JANUARY TO JUNE 1989



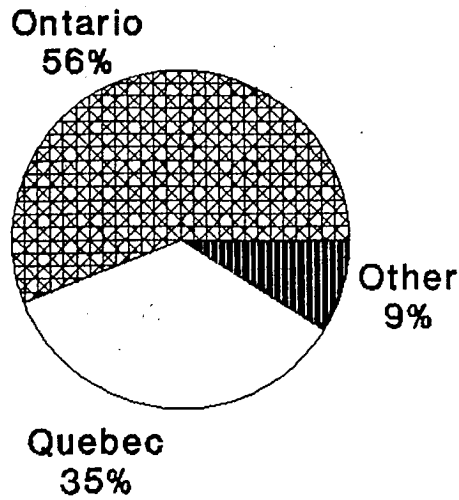
100% = \$3.2 Million

The United States was the dominant source of imports during the period analyzed, accounting for eighty-six per cent of the total import value. Other countries exporting to Canada with total shipments of \$100,000 and over are: Federal Republic of Germany and Poland. For further details, see Appendix D. A detailed list of major exporters to Canada in descending order of value, is shown in Appendix E.

III. ANALYSIS OF IMPORTS (Cont'd)

BY PROVINCE OF CONSIGNEE

JANUARY TO JUNE 1989



100% = \$3.2 Million

Ontario was the major province of consignee, accounting for \$1.7 million or fifty-six per cent of the total import value, followed by Québec with thirty-five per cent. For a complete breakdown of the remaining nine per cent, see imports by province of consignee, Appendix F.

III. ANALYSIS OF IMPORTS (Cont'd)

JANUARY TO JUNE 1989

IMPORT MARKET CONCENTRATION

<u>Principal Consignees/Importers</u> (By Value)	<u>Cumulative Value</u> (\$000)	<u>Cumulative % of Total Value</u>
3	1 880	59
6	2 272	71
10	2 498	78
15	2 813	88
All Consignees/Importers (52)	3 191	100

There were 52 known consignees/importers during the period January to June 1989. Six consignees/importers had imports of at least \$100 thousand during that period. The top six consignees/importers accounted for \$2.3 million or seventy-one per cent of the total dollar value of imports. All consignees/importers are listed in alphabetical order in Appendix G.

IV. CANADIAN PRODUCTION

According to Statistics Canada, at the present time, chemicals, as described in this report, are not manufactured in Canada.

V. MARKET SUMMARY

These comments are limited to the three sodium sulphite chemicals (ammonium thiosulphate not included).

Sodium Hydrogen Sulphite

Most commonly known as sodium hydrosulphite, this material is used for groundwood and mechanical pulp bleaching (80%) and for Vat dyeing of cotton (20%). There is no merchant production, but merchant sales total about 10 Ktonne/year.

In the pulp end use, mills often generate their own material on site starting with sulphur dioxide and purchased sodium borohydride. Including this captive production, total use would be in the 40 Ktonne/year range.

United States capacity for sodium sulphate is in the 80 Ktonne per year range.

Disodium DiSulphate (Sodium Metabisulphite)

There is no merchant production in Canada and principal uses for the imported material are chemical intermediates (40%), pharmaceuticals (40%) and food preservatives (20%). There is also a developing use for elimination of residual chlorine in bleached pulps.

The product is made from sodium sulphite and sulphur dioxide. Total U.S. production is in the 50 Ktonne/year range.

Sodium Sulphite

Forecast 1990 Canadian demand is in the 7 Ktonne/year range with water treatment (50%) explosives (17%) and flotation of ores (10%) as the principal end uses. The remainder is used in pulp mills. While there is no merchant production, a number of Canadian pulp mills produce their own material for captive use by reaction of sulphur dioxide with caustic soda.

United States capacity for sodium sulphite is in the 200 Ktonne/year range.

Market Outlook

Growth prospects for merchant uses are modest and in general there is downward pressure on the pulp bleaching end use as a result of mills switching to hydrogen peroxide bleaching.

Nevertheless, merchant production to replace imports remains an opportunity. It would appear to be best carried out by or with an existing paper mill that is already producing sulphite chemicals for its own captive use.

APPENDIX A

IMPORTS BY TYPE AND GRADE

JANUARY TO JUNE 1989

<u>Type</u>	<u>Grade</u>	<u>Quantity</u> (cwt)	<u>Value</u> (\$)	<u>Average</u> <u>Unit Price</u> (\$/cwt)
Sodium Sulphite:	Photographic	1 732	38 680	22
	Technical	<u>149 830</u>	<u>2 082 559</u>	<u>14</u>
TOTAL Sodium Sulphite		<u>151 563</u>	<u>2 121 240</u>	<u>14</u>
TOTAL Sodium Metabisulphite:	Food) * <u>31 631</u>	<u>606 053</u>	<u>19</u>
	Photographic			
	Technical)		
Sodium Bisulphite:	Food) * 716	15 048	21
	Photographic			
	Technical)		
TOTAL Sodium Bisulphite		<u>1 291</u>	<u>27 338</u>	<u>21</u>
		<u>2 008</u>	<u>42 386</u>	<u>21</u>
Ammonium Thiosulphate:	Photographic	13 986	225 450	16
	Technical	<u>16 212</u>	<u>195 513</u>	<u>12</u>
TOTAL Ammonium Thiosulphate		<u>30 199</u>	<u>420 963</u>	<u>14</u>
GRAND TOTAL		<u>215 401</u>	<u>3 190 642</u>	

* Aggregated to preserve confidentiality of Canadian importers.

APPENDIX B

IMPORTS BY TYPE AND PRICE RANGE

JANUARY TO JUNE 1989

<u>Type</u>	<u>Price Range</u> (\$/cwt)	<u>Quantity</u> (cwt)	<u>Value</u> (\$)	<u>Average</u> <u>Unit Price</u> (\$/cwt)
Sodium Sulphite:	Up to 10	70 431	449 904	6
	Over 10 to 15	11 021	148 156	13
	Over 15 to 20	46 814	838 682	18
	Over 20 to 25	17 758	392 343	22
	Over 25 to 30	1 153	31 198	27
	Over 30	<u>4 386</u>	<u>260 957</u>	<u>60</u>
TOTAL Sodium Sulphite		151 563	2 121 240	14
Sodium Metabisulphite	Up to 13	7 204	72 213	10
	Over 13 to 15	1 512	21 380	14
	Over 15 to 20	4 430	80 694	18
	Over 20 to 25	16 898	359 192	21
	Over 25	<u>1 587</u>	<u>72 575</u>	<u>46</u>
TOTAL Sodium Metabisulphite		31 631	606 053	19
Sodium Bisulphite	Up to 22	1 747	34 561	20
	Over 22	<u>261</u>	<u>7 825</u>	<u>30</u>
TOTAL Sodium Bisulphite		2 008	42 386	21
Ammonium Thiosulphate	Up to 10	6 814	60 859	9
	Over 10 to 15	14 948	167 245	11
	Over 15 to 20	6 003	103 204	17
	Over 20 to 30	1 032	30 813	24
	Over 30	<u>1 311</u>	<u>58 841</u>	<u>52</u>
TOTAL Ammonium Thiosulphate		30 199	420 963	14
GRAND TOTAL		<u>215 401</u>	<u>3 190 642</u>	

APPENDIX C

IMPORTS BY IMPORTER TYPE

JANUARY TO JUNE 1989

<u>Importer Type</u>	<u>Quantity</u> (cwt)	<u>Value</u> (\$)	<u>% of</u> <u>Total Value</u>
Wholesale	97 747	1 770 853	56
Manufacturing	98 788	1 111 718	35
Services	2 918	54 648	2
Mining	2 807	43 338	1
Transportation	1 562	28 906	1
Retail	505	12 617	*
Construction	240	6 003	*
Not Indicated	<u>10 835</u>	<u>162 559</u>	<u>5</u>
GRAND TOTAL	<u>215 401</u>	<u>3 190 642</u>	<u>100</u>

APPENDIX D

IMPORTS BY COUNTRY OF ORIGIN

JANUARY TO JUNE 1989

<u>Country of Origin</u>	<u>Quantity</u> (cwt)	<u>Value</u> (\$)
United States	185 482	2 742 175
Federal Republic of Germany	10 138	159 879
Poland	9 052	112 507
Japan	6 510	86 663
France	*	*
China	1 050	18 596
Italy	*	*
United Kingdom	*	*
Hong Kong	*	*
TOTAL	<u>215 401</u>	<u>3 190 642</u>

* Confidential - The total for these countries were 3 168 cwt valued at \$70 821.

APPENDIX E

FOREIGN EXPORTERS TO CANADA

JANUARY TO JUNE 1989

Exporters to Canada are listed below in descending order of dollar value. Names are as shown on the shipping documents.

<u>Name</u>	<u>Address</u>	<u>Value of Imports</u> (\$ 000)
Indspec Chemical Corp.	Tuscaloosa, AL, USA	995
General Chemical Corp.	Claymont, DA, USA	906
Koppers Co. Inc. BASF Aktiengesellschaft	Tuscaloosa, AL, USA) Ludwigshafen, Federal Republic of Germany)*	469
Texas Sulphur Products Co.	Hammond, ID, USA	137
Ciech Import Export	Warszawa, Poland	120
Olin Hunt Specialty Prod.	Rolling Meadows, IL, USA	113
Mitsuya Boeki Ltd. EI Dupont de Nemours & Co. Inc.	Osaka, Japan) Linden, NJ, USA)*	142
Hoechst Celanese Chem. Group White Mountain Imaging	Portsmouth, VA, USA) Webster, NH, USA)*	115
Kerley Ind. Inc. Rhône-Poulenc Chimie de Base	Ottawa, IL, USA) Cedex, France)*	76
China National Chem. I/E Corp.	Shanghai, China	25
Thatcher Co. Idrosol S.R.L. Solvox Mfg. Co.	Salt Lake City, UT, USA) Novara, Italy)* Milwaukee, WI, USA)	54
Nichimen Corp. William Blythe Co. Ltd.	Tokyo, Japan) Lancashire, U.K.)*	24

* Aggregated to preserve confidentiality of Canadian importers.

APPENDIX E

FOREIGN EXPORTERS TO CANADA (Cont'd)

JANUARY TO JUNE 1989

<u>Name</u>	<u>Address</u>	<u>Value of Imports</u> (\$ 000)
Barson Chemical Co.	Wheeling, IL, USA)	9
Akzo Kemi America	Maple Shade, NJ, USA)*	
BDH Ltd.	Poole Dorset, UK)	
Prior Chem. Corp.	New York, NY, USA)	4
Eastman Kodak Corp.	Rochester, NY, USA)*	
Dyl-Chem. Inc.	New Bedford, MA, USA)	
Mallinckrodt Inc.	Paris, KY, USA)	2
Fisher Scientific Co.	Somerville, NJ, USA)	
Van Waters & Rogers Inc.	Kent, WA, USA)*	
Merek E	Darmstadt, West Germany)	
VWR Scientific	Brisbane, CA, USA)	

* Aggregated to preserve confidentiality of Canadian importers.

APPENDIX F

IMPORTS BY PROVINCE OF CONSIGNEE

JANUARY TO JUNE 1989

	<u>Quantity</u> (cwt)	<u>% of</u> <u>Total Quantity</u>	<u>Value</u> (\$)	<u>% of</u> <u>Total Value</u>
Ontario	137 444	62	1 780 086	56
Québec	60 825	28	1 102 229	35
British Columbia	7 237	3	138 674	4
Alberta	4 269	2	90 594	3
Nova Scotia	*	*	*	*
New Brunswick	*	*	*	*
Manitoba	*	*	*	*
Saskatchewan	*	*	*	*
	<u>215 401</u>	<u>100</u>	<u>3 190 642</u>	<u>100</u>

* Confidential - The total for these provinces were 5 626 cwt valued at \$79 059.

CANADIAN IMPORTERS

JANUARY TO JUNE 1989

Importers during the period of January to June 1989, as indicated in this report, are listed below in alphabetical order. Where the importer is not the same as the consignee (i.e. the recipient of the goods shipped), the name of the consignee rather than that of the importer is listed. The importer or consignee is not necessarily the end-user of the product.

NOTE: This list includes all importers except individuals.

<u>Name</u>	<u>Address</u>	<u>Name</u>	<u>Address</u>
Asichem International Ltd.	Richmond, B.C.	Highland Valley Copper Inc.	Logan Lake, B.C.
BASF Canada Inc.	Rexdale, Ont., Mount Royal, Qué.,	Innomed Christie Group Ltd.	Edmonton, Alta.
BDH Chemicals Ltd.	Toronto, Ont.	Kingsley and Kelth Inc.	Etobicoke, Ont.
Betz Inc.	Pointe-Claire, Qué.	Kissner Milling Co. Ltd.	Kitchener, Ont.
C.I.L. Inc.	Edmonton, Alta.	Kodak Canada Inc.	Toronto, Ont.
Cambridge Photo Chem Inc.	Vancouver, B.C.	Konica Canada Inc.	Mississauga, Ont.
Canada Colors and Chemicals Ltd.	Bécancour, Qué.	Le Groupe Christie Ltée.	St. Eustache, Qué.
Champion Litho Products Ltd.	North York, Ont.	Mackenzie and Feimann Ltd.	Toronto, Ont.
Consolidated Bathurst Inc.	Cambridge, Ont.	MacMillan Bloedel Ltd.	North Vancouver, B.C.
Country Market Ltd. (Pools)	Cambridge, Ont.	Mallinckrodt Canada Ltd.	Sturgeon Falls, Ont.
Crystal Clear Bluewater Pools Inc.	Don Mills, Ont.	May & Baker (Canada) Ltd.	Pointe-Claire, Qué.
Culligan of Canada Ltd.	St-Laurent, Qué.	Minova Inc.	Mississauga, Ont.
Diatech Imaging Inc.	Mississauga, Ont.	Norchem Radiographics Inc.	Mississauga, Ont.
Dionne Marcel Inc.	Bathurst, N.B.	Olin Hunt Specialty Products Ltd.	Montréal, Qué.
Discounter's Pool Warehouse Inc.	Lindsay, Ont.	Pigment and Chemical Inc.	Schreiber, Ont.
Fisher Scientific Ltd.	Chatham, Ont.	Piscines St-Jerome Inc.	Chelmsfurt, Ont.
Flexo Products Ltd.	Mississauga, Ont.	Piscines St-Louis Inc.	Mississauga, Ont.
Fuigi-Hunt Photographic Chem Ltd.	Nepean, Ont.	Piscines Tropicana Inc.	Milton, Ont.
General Chem. Corp.	Rimouski, Qué.	Plomberie Sol Air Eau Bas Inc.	Halifax, N.S.
Greenville Liquid Plant Foods Inc.	Scarborough, Ont.	Quadra Chemicals Ltd.	Montréal, Qué.
Hanson Mohawk Mills Inc.	Whitby, Ont.	Rhone-Poulenc Canada Inc.	Lafontaine, Qué.
Harrison & Crosfield (Canada) Ltd.	Niagara Falls, Ont.	Scott Paper Ltd.	St-Louis de France, Qué.
	Mississauga, Ont.	Seven Seas Pool Inc.	Terrebonne, Qué.
	Mississauga, Ont.		Rimouski, Qué.
	Amherstburg, Ont.		St. Laurent, Qué.
	Stratford, Ont.		Mississauga, Ont.
	Stratford, Ont.		New Westminster, B.C.
	Saskatoon, Sask.		Brockville, Ont.
	New Westminster, B.C.		

CANADIAN IMPORTERS (Cont'd)

JANUARY TO JUNE 1989

<u>Name</u>	<u>Address</u>	<u>Name</u>	<u>Address</u>
Somavrac Inc.	Trois-Rivières, Qué.	Van Waters & Rogers Ltd.	Bathurst, N.B. Edmonton, Alta.
Stanchem and Alchem Inc.	Burlington, Ont.		Lachine, Qué.
Tempo Chemicals Inc.	Etobicoke, Ont.		Weston, Ont.
Valley Pools Ltd.	Penticton, B.C.	Waterbee Pools Inc.	Richmond, B.C.
		Western Scientific Services	Harrow, Ont. Richmond, B.C.

CANADIAN AND FOREIGN TARIFFS

Chemicals included in this analysis were dutiable under the following Canadian tariff items.

Tariff Item	Description of Goods	Tariff Treatment			% of Total Imports Jan. to June 1989
		Most Favoured Nation Tariff	General Preferential Tariff	United States Tariff	
	Sulphites; thiosulphates				
2832.10.00	Sodium sulphites	Free	Free	Free	86
2832.30.90	Other thiosulphates	Free	Free	Free	14

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) 954-6903

FOREIGN COUNTRIES

Enquiries concerning tariffs and other government trade regulations in foreign countries should be directed to:

Info Export
External Affairs
Ottawa, Ontario
K1A 0G2
Tel.: (613) 993-6435 OR 1-800-267-8376

RECONCILIATION

Imports during the period January to June 1989, as reported on documents analyzed in this report, amounted to \$3 190 642. The value reported in this import analysis does not correspond to the official Statistics Canada figure of \$3 657 174 for various reasons. Reconciliation of the two total figures is explained as follows:

<u>Value Accounted For</u>	<u>Value</u> <u>(\$000)</u>
Documents referring to products which should have been classified elsewhere	74
Values reported by Statistics Canada but not included in this report (e.g., documents not available)	392
Total values report in this import analysis	<u>3 191</u>
Total values accounted for as above	3 657
Total values published by Statistics Canada	3 657