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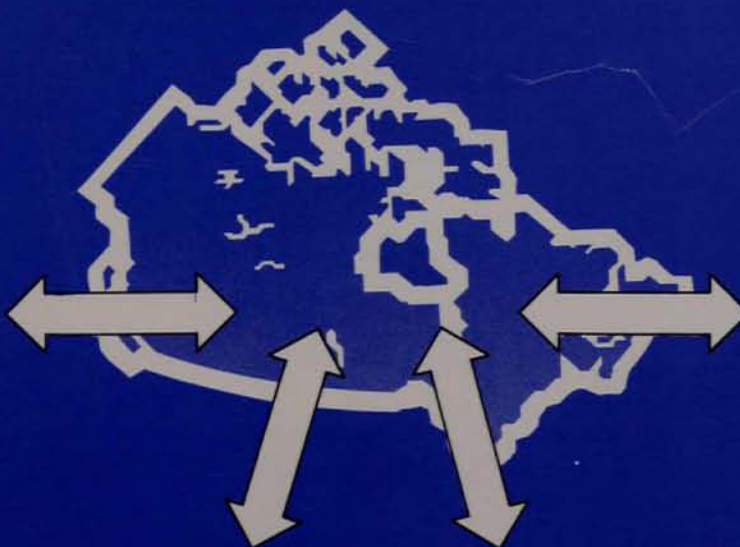
MARKET INTELLIGENCE

POLYETHYLENE
STRETCH FILM

APRIL, MAY AND JUNE 1989

Pub. No.: 89015-PM

February 1990



Canada



I.D. 2744

**POLYETHYLENE
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235 Queen Street
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K1A 0H5
Tel: (613) 954-4970

OR Plastic, Rubber and Chemical Specialties
Division
Chemicals and Investments Directorate
Industry, Science and Technology Canada
235 Queen Street
Ottawa, Ontario
K1A 0H5
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REFERENCE SOURCES

Industry, Science and Technology Canada
Statistics Canada
Revenue Canada

TARIFFS

Enquiries concerning **Canadian** tariffs should be directed to the nearest Customs and Excise office or to:

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Revenue Canada
Customs and Excise
Ottawa, Ontario
K1A 0L5
Tel.: (613) 954-6904

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

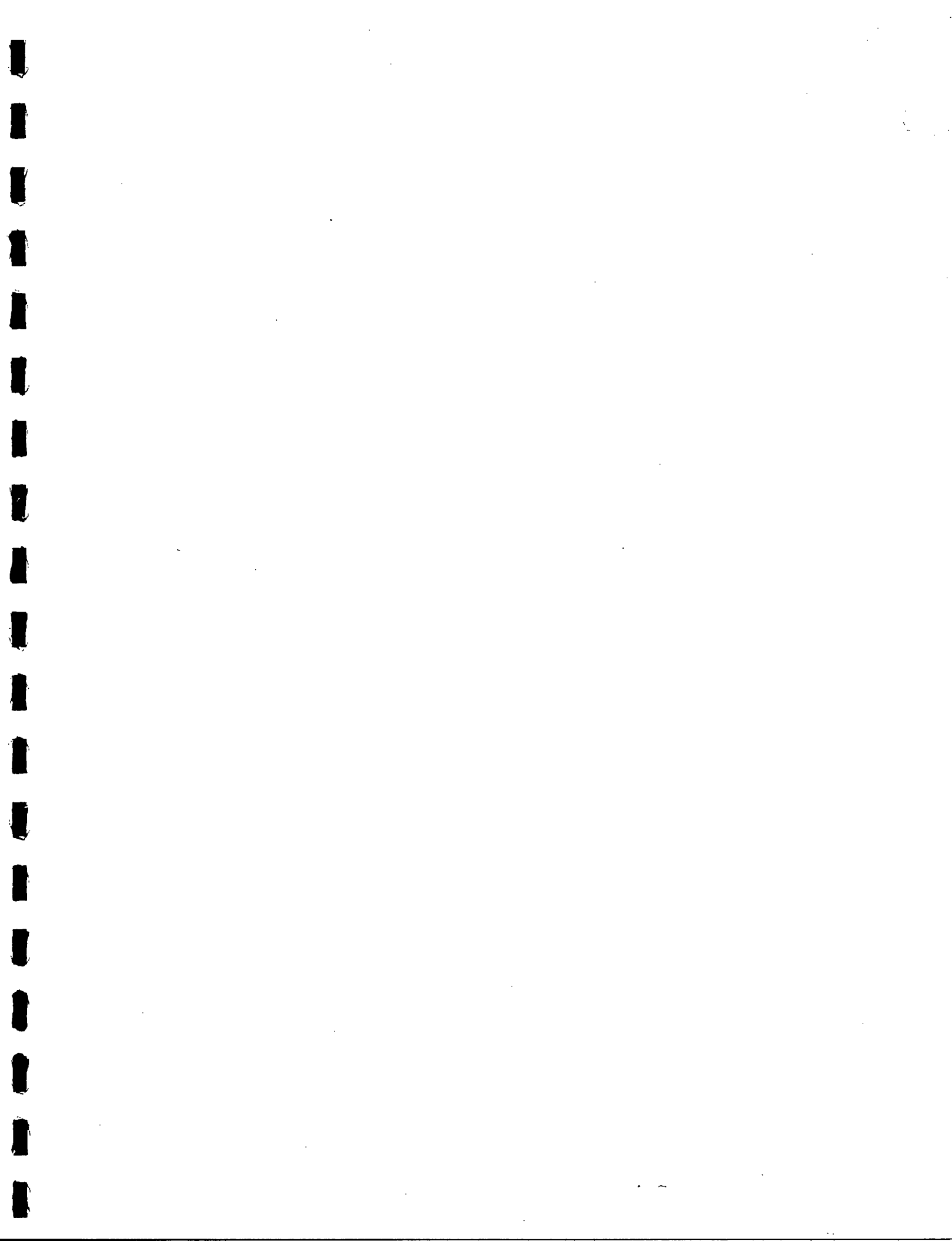
Dollar values shown in this report are based on selling price F.O.B. plant, in Canadian dollars. This selling price represents the value paid by the importer, excluding all freight, packing and insurance costs when specified. All trade discounts, when applicable, are also deducted from the selling price.

Rounding

Figures may not add due to rounding.

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IMPORT ANALYSIS

POLYETHYLENE STRETCH FILM

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 their 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 on imports of Polyethylene Stretch Film is based on a detailed examination of Revenue Canada Customs import documents for the period of April, May and June 1989. The following Harmonized System (H.S.) import commodity codes were analyzed:

<u>Description</u>	<u>H.S. Commodity Codes Analyzed</u>
Other Plates, Sheets, Film, Foil and Strip, of Plastics, Non-Cellular and Not Reinforced, Laminated, Supported or Similarly Combined with Other Materials (39.20)	
•Of Polymers of Ethylene (3920.10.00)	
•Polyethylene Having a Specific Gravity of Less Than 0.94:	
•Of a Thickness Not Exceeding 0.25 MM	3920.10.00.11
•Polyethylene Having a Specific Gravity of 0.94 or More:	
•Of a Thickness Not Exceeding 0.25 MM	3920.10.00.21
•Other	
•Of a Thickness Not Exceeding 0.25 MM	3920.10.00.91

Imports of these import commodity codes for the period analyzed amounted to \$12.9 million. For purposes of this analysis, only those shipments described as polyethylene stretch film and having a value of \$10 thousand or over were captured. These shipments amounted to \$1.9 million.

II. ANALYSIS OF IMPORTS
POLYETHYLENE STRETCH FILM
APRIL, MAY AND JUNE 1989

Imports of polyethylene stretch film amounted to 814 tonne for a value of \$1.9 million for the period April to June 1989. All shipments originated in the U.S.A.

Polyethylene stretch film priced from \$2.26 to \$2.55 per kilogram accounted for 560 tonne for a value of \$1.4 million or 69 per cent of the total quantity and 71 per cent of the total value. (For further details by Price Range refer to Appendix A.)

Polyethylene stretch film is shipped on rolls of various widths. The bulk of the imports were on 20 and 30 inch wide rolls. These two sizes accounted for 648 tonne and \$1.5 million or 80 per cent and 81 per cent of the total quantity and value respectively.

SUMMARY OF IMPORTS
BY ROLL SIZE

Width of Rolls (inches)	VALUE		No. of Rolls (000)	QUANTITY	
	\$000	% of Total		Kg (000)	% of Total
20	1 113	58	30	471	58
30	431	22	7	177	22
Other	46	2	1	23	3
Not Known	<u>326</u>	<u>17</u>	<u>-</u>	<u>143</u>	<u>18</u>
TOTAL	1 916	100		814	100

II. ANALYSIS OF IMPORTS (Cont'd)

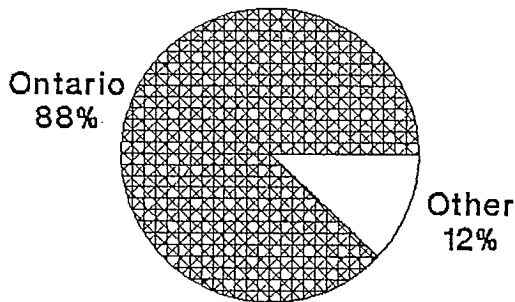
POLYETHYLENE STRETCH FILM

BY PROVINCE OF CONSIGNEE

APRIL, MAY AND JUNE 1989

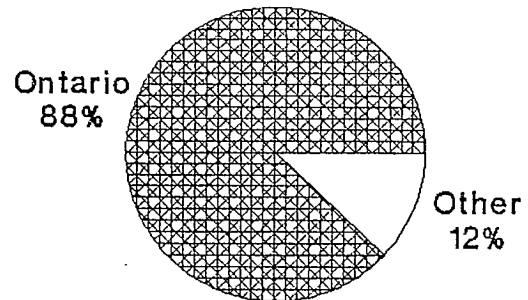
Ontario was the major province of consignee, accounting for 814 tonne and \$1.7 million or 88 per cent of both the total import quantity and value respectively. Other provinces of consignee, in descending order of value, were British Columbia, Manitoba and Québec. (For further details refer to Appendix B.)

Quantity



100% = 814 Tonne

Value



100% = \$1.9 Million

II. ANALYSIS OF IMPORTS (Cont'd)

POLYETHYLENE STRETCH FILM

APRIL, MAY AND JUNE 1989

IMPORT MARKET CONCENTRATION

<u>Principal Consignees/Importers</u> (By Value)	<u>Cumulative Value</u> (\$000)	<u>Cumulative % of Total Value</u>
3	1 468	77
All Consignees/Importers (7)	<u>1 916</u>	<u>100</u>

There were 7 known consignees/importers of polyethylene stretch film during the period April to June 1989. The top three consignees/importers accounted for \$1.5 million 77 per cent of the total dollar value of imports. All consignees/importers are listed in alphabetical order in Appendix C.

III. CANADIAN PRODUCTION

According to Statistics Canada, in 1988 Canadian shipments of polyethylene stretch film amounted to 23.7 million kilograms.

IV. MARKET SUMMARY

Polyethylene stretch films are usually manufactured using linear low density polyethylene resins. These are co-polymer resins in which the co-monomer imparts very specific tensile and tackiness properties to the finished films. These films have the property of being stretched two to three times their original length without tearing or puncturing and they must retain this property under continued tension.

Stretch films are used to secure loose items on shipping pallets. Applied by hand or by a wrapping machine, the broad film is wound around a load while being stretched. When released, it's elastic properties bind the load together, eliminating movement during shipping. The films also protect against dirt, dust and moisture damage as well as reducing pilferage. These advantages, combined with lower costs, make stretch films preferable to other unitizing methods such as strapping, tape and shrink films.

At least seven companies in Canada at present are manufacturing stretch films and all but one are located in southern Ontario. As market demand continues to increase manufacturing plants may be established in other areas of the country.

APPENDIX A

IMPORTS OF POLYETHYLENE STRETCH FILM
BY PRICE RANGE

APRIL, MAY AND JUNE 1989

<u>Price Range</u> (\$/kg)	<u>Quantity</u> (000 kg)	<u>% of Total</u> <u>Quantity</u>	<u>Value</u> (\$000)	<u>% of Total</u> <u>Value</u>
0.85 to 2.00	83	10	137	7
2.01 to 2.10	55	7	115	6
2.11 to 2.19	18	2	39	2
2.20 to 2.25	16	2	36	2
2.26 to 2.29	80	10	182	9
2.30 to 2.35	69	8	161	8
2.36 to 2.39	61	7	146	8
2.40 to 2.49	125	15	307	16
2.50 to 2.55	225	28	568	30
2.56 to 2.59	46	6	117	6
2.60 to 3.00	18	2	47	2
OVER 3.00	<u>19</u>	<u>2</u>	<u>62</u>	<u>3</u>
TOTAL	814	100	1 916	100

APPENDIX B

IMPORTS OF POLYETHYLENE STRETCH FILM
BY PROVINCE OF CONSIGNEE
APRIL, MAY AND JUNE 1989

<u>Province</u>	<u>Quantity</u> (000 kg)	<u>Value</u> (\$000)	<u>% of Total</u> <u>Value</u>
Ontario	716	1 689	88
British Columbia) Manitoba) Québec)	98	226	12
TOTAL	814	1 916	100

* Aggregated to preserve confidentiality of Canadian importers.

**CANADIAN IMPORTERS
POLYETHYLENE STRETCH FILM**

APRIL, MAY AND JUNE 1989

Importers of polyethylene stretch film during the period of April, May and 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>
Futurpak Systems Inc.	Downsview, Ont.
Linear Films Inc.	Edmonton, Alta.
	Scarborough, Ont.
	St. Cesaire, Qué.
Lowry's Mfg. & Sales Ltd.	Winnipeg, Man.
Mobil Chemical Co.	Belleville, Ont.
Pak-Tek Packaging Inc.	St. Laurent, Qué.
Samuel Strapping Systems Ltd.	Mississauga, Ont.
United Shipping Supplies Ltd.	Richmond, B.C.

APPENDIX D

FOREIGN EXPORTERS TO CANADA

POLYETHYLENE STRETCH FILM

APRIL, MAY AND JUNE 1989

There were three exporters to Canada of polyethylene stretch film. They are listed below in order of dollar value. Names are as shown on the shipping documents.

<u>Name</u>	<u>Address</u>	<u>Value of Exports to Canada</u> <u>(\$000)</u>
Linear Films Inc.	Tulsa, Oklahoma, USA	} * 1 916
Mobil Chemical Co. Inc.	Jacksonville, IL, USA	
Presto Products Co. Inc.	Appleton, Wisconsin, USA	

* Aggregated to preserve confidentiality of Canadian importers.

**CANADIAN SUPPLIERS
POLYETHYLENE FILM**

The following lists are taken from two sources: a) the Business Opportunities Sourcing System (BOSS), a computerized data bank established by the Federal Department of Industry, Science and Technology Canada; and, b) the Canadian Trade Index, published by the Canadian Manufacturers' Association (CMA). These lists may not include all suppliers of the products in question, as companies must themselves register in BOSS or the Canadian Trade Index. In both cases, information on Canadian products supplied is as given by the companies.

Canadian companies are arranged in alphabetical order.

BOSS

Polyethylene Film, Low, Medium and High Density .01 inch or Less in Thickness

<u>Name</u>	<u>Address</u>
Allied Halo Industries Inc.	Scarborough, Ont.
*Bonar Packaging Ltd.	Burlington, Ont.
Bonar Packaging Ltd. (Plastics Div.)	Calgary, Alta.
Borden Packaging & Industrial Prod Inc.	West Hill, Ont.
*Columbia Geosystems Ltd.	Calgary, Alta.
Corporation Plastalene Ltée.	Granby, Qué.
Crown Packaging Flex Pak Division Ltd.	Richmond, B.C.
DRG Packaging Division of DRG Inc.	Toronto, Ont.
Dupont Canada Inc.	Mississauga, Ont.
*Ellehammer Industries Ltd.	Surrey, B.C.
Farnell Packaging Ltd.	Dartmouth, N.S.
Flexo Converters Inc.	Concord, Ont.
Hilinox Packaging Inc.	Vancouver, B.C.
Krico Manufacturing Ltd.	Calgary, Alta.
*Leco Films, Div. of Tecsyn Canada Ltd.	Rexdale, Ont.
Les Plastiques Balcan Limitée	St. Léonard, Qué.
M Pak Plastics Ltd.	Calgary, Alta.
*Medallion Plastics Ltd.	Burlington, Ont.
Merlund Plastics Ltd.	Edmonton, Alta.
*Mobil Chemical Canada Ltd.	Belleville, Ont.
Poly-Cel Packaging Products Ltd.	Mississauga, Ont.
Rayton Packaging Ltd.	Calgary, Alta.
Royalpak Polybag Ltd.	Etobicoke, Ont.
Speers Petrochemicals Ltd.	Winnipeg, Man.

* Company engaged in export trade

CANADIAN SUPPLIERS (Cont'd)
POLYETHYLENE FILM

BOSS

Polyethylene Film, Low, Medium and High Density .01 inch or Less in Thickness

<u>Name</u>	<u>Address</u>
*Transilwrap of Canada Ltd. Twinpak Inc.	Scarborough, Ont. Dorval, Qué.
*Union Carbide Canada Ltd. Uniplast Industries Inc.	Toronto, Ont. Orillia, Ont.
*Vary Industries (1982) Ltd. W. Ralston Canada Inc.	Grimsby, Ont. Drumheller, Alta.
Western Concord Manufacturing Ltd. Weston Plastics Inc.	New Westminster, B.C. Winnipeg, Man.

Any enquiries and/or comments regarding the BOSS list should be directed to:

Business Opportunities Sourcing System (ABOS)
Industry, Science and Technology Canada
235 Queen Street
Ottawa, Ontario K1A 0H5
Tel.: (613) 954-5031
Telex: 053-4123
Fax: (613) 954-1894

CANADIAN TRADE INDEX

Film, Transparent and Unsupported, Plastic, Polypropylene, Polyester and Polyethylene

<u>Name</u>	<u>Address</u>
*AVP Extrusions Ltd. Abitibi-Price Inc. Afeyan Industries Inc. Allied-Halo Industries Inc. Allied Pioneer Industries Ltd. Apache Plastics Ltd. Arrow Plastics, Div. of 569471 Ont. Inc.	Newcastle, Ont. Toronto, Ont. Montréal, Qué. Scarborough, Ont. Winnipeg, Man. Burlington, Ont. Scarborough, Ont.
*BCL Canada, Div. International Paints Canada Limited	Cornwall, Ont.

* Company engaged in export trade

CANADIAN SUPPLIERS (Cont'd)

POLYETHYLENE FILM

CANADIAN TRADE INDEX

Film, Transparent and Unsupported, Plastic, Polypropylene, Polyester and Polyethylene

<u>Name</u>	<u>Address</u>
Balcan Plastics Ltd.	St. Léonard, Qué.
Big M Plastics Ltd.	Lethbridge, Alta.
Borden Chemical, Div. of the Borden Company, Ltd.	West Hill, Ont.
*C-I-L Inc.	North York, Ont.
*Campbell Films Ltd.	Orillia, Ont.
*Canadian General-Tower Ltd.	Cambridge, Ont.
Canadian Technical Tape Ltd.	Montréal, Qué.
Chempac Powder, Div. of CCL Ind. Inc.	Toronto, Ont.
Cinran Plastics Inc.	London, Ont.
Coastal Plastics Ltd.	Dartmouth, N.S.
Condor Laminations Inc.	Agincourt, Ont.
Cryovac Div. W.R. Grace & Company of Canada Ltd.	Mississauga, Ont.
Deluxe Paper Products Ltd.	Montréal, Qué.
Diverse Blending Ltd.	Orillia, Ont.
Dominion Tape of Canada, Ltd.	Cornwall, Ont.
*Dupont Canada Inc.	Mississauga, Ont.
Ellehammer Industries Ltd.	Sidney, B.C.
False Creek Industries Ltd.	Vancouver, B.C.
GBC Canada Inc.	Etobicoke, Ont.
Goodyear Canada Inc., Plastic Films Div.	Toronto, Ont.
Graphic Flexible Packaging Ltd.	Orangeville, Ont.
Hercules Canada Inc.	Mississauga, Ont.
Hilinox Packaging Inc.	Vancouver, B.C.
Hoechst Canada Inc.	Montréal, Qué.
Hymo Pack Ltd./Ltée.	Toronto, Ont.
Lawson Mardon Flexible Packaging Inc.	Weston, Ont.
Layfield Plastics (1978) Ltd.	Edmonton, Alta.
*Leco Films Ltd.	Rexdale, Ont.
*M&R Plastics Inc.	Fabreville, Qué.
Magic Foil Ltd./Ltée.	Agincourt, Ont.
Medallion Plastics Ltd.	Burlington, Ont.
*Merlund Plastics Ltd.	Edmonton, Alta.
Mobil Chemical Canada Ltd., Plastics and Films Division	Belleville, Ont.
Modern Wrappings Ltd.	Rexdale, Ont.

* Company engaged in export trade

CANADIAN SUPPLIERS (Cont'd)

POLYETHYLENE FILM

CANADIAN TRADE INDEX

Film, Transparent and Unsupported, Plastic, Polypropylene, Polyester and Polyethylene

<u>Name</u>	<u>Address</u>
*Multipak Ltd. Nor Baker Industries Ltd., Plastics Div. Northern Plastics Ltd. Peel Plastic Products Ltd.	Montréal, Qué. Newmarket, Ont. Markham, Ont. Brampton, Ont.
*Plastalene Corp. Ltd. Plastics Canada, Div. of Hetman Canada Ltd.	Granby, Qué. Toronto, Ont.
*Polex Mfg. (Canada) Ltd. Poliplastic Inc.	Delta, B.C. Granby, Qué.
*Poly-Cello, Div. of EPC Ind. Ltd. Polyson Polyethylene Products 1986 Ltd.	Amherst, N.S. Scarborough, Ont.
*Progressive Packaging Ltd. Ralston W., (Canada) Inc. Regency Plastics Co. Ltd. Reynolds Aluminum Co. of Canada Ltd., Container Division	Aurora, Ont. Montréal, Qué. Downsview, Ont. Etobicoke, Ont.
Roll-O-Sheets Canada Ltd. Smith Packaging Ltd. Sommerville Belkin Industries Ltd., Flexible Packaging Division	Barrie, Ont. Mississauga, Ont. Surrey, B.C.
Tecsyn International Inc. Transilwrap of Canada Ltd. 3M Canada Inc. Union Carbide Canada Ltd. Western Concord Mfg. Ltd. Winpak Ltd.	St. Catharines, Ont. Scarborough, Ont. London, Ont. Toronto, Ont. New Westminster, B.C. Winnipeg, Man.

* Company engaged in export trade

Any enquiries and/or comments regarding the Canadian Trade Index list should be directed to:

The Canadian Manufacturers' Association
One Yonge Street
Toronto, Ontario M5E 1J9
Tel.: (416) 363-7261
Telex: 065-24693
Fax: (416) 363-3779

APPENDIX F

CANADIAN AND FOREIGN TARIFFS

Polyethylene stretch film included in this analysis was dutiable under the following Canadian tariff item.

<u>Tariff Item</u>	<u>Description of Goods</u>	<u>Tariff Treatment</u>		
		<u>Most Favoured Nation Tariff</u>	<u>General Preferential Tariff</u>	<u>United States Tariff</u>
3920.10.00	Other Plates, Sheets, Film, Foil and Strip, of Plastics, Non-Cellular and Not Reinforced, Laminated, Supported or Similarly Combined with Other Materials --Of Polymers of Ethylene	13.6%	9%	12.2%
	On and After January 1, 1990			10.8%
	On and After January 1, 1991			9.5%

TARIFF ARRANGEMENTS AND FOREIGN COUNTRIES OF EXPORT

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) 954-6904
Fax.: (613) 954-2509

FOREIGN COUNTRIES

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

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Tel.: (613) 993-6435 OR 1-800-267-8376
Fax.: (613) 996-9709