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# MARKET INTELLIGENCE

## COMPOUND BOWS

JULY, AUGUST AND SEPTEMBER 1989

Pub. No.: 90031-IA

July 1990



Canada



ID. 90-0089

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**FOR MORE INFORMATION PLEASE CONTACT:**

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Industry, Science and Technology Canada  
235 Queen Street  
Ottawa, Ontario  
K1A 0H5  
Tel.: (613) 954-4970

OR  
Leisure Products Division  
Service Industries and  
Consumer Goods Branch  
Industry, Science and Technology Canada  
235 Queen Street  
Ottawa, Ontario  
K1A 0H5  
Tel.: (613) 954-3109

**REFERENCE SOURCES**

Industry, Science and Technology Canada  
Statistics Canada, Tel.: (613) 951-9647  
Revenue Canada, Tel.: (613) 954-7012  
U.S. Department of Commerce,  
Bureau of the Census  
Tel.: (301) 763-7754

**TARIFFS**

Enquiries concerning **Canadian** 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) 954-7012

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**

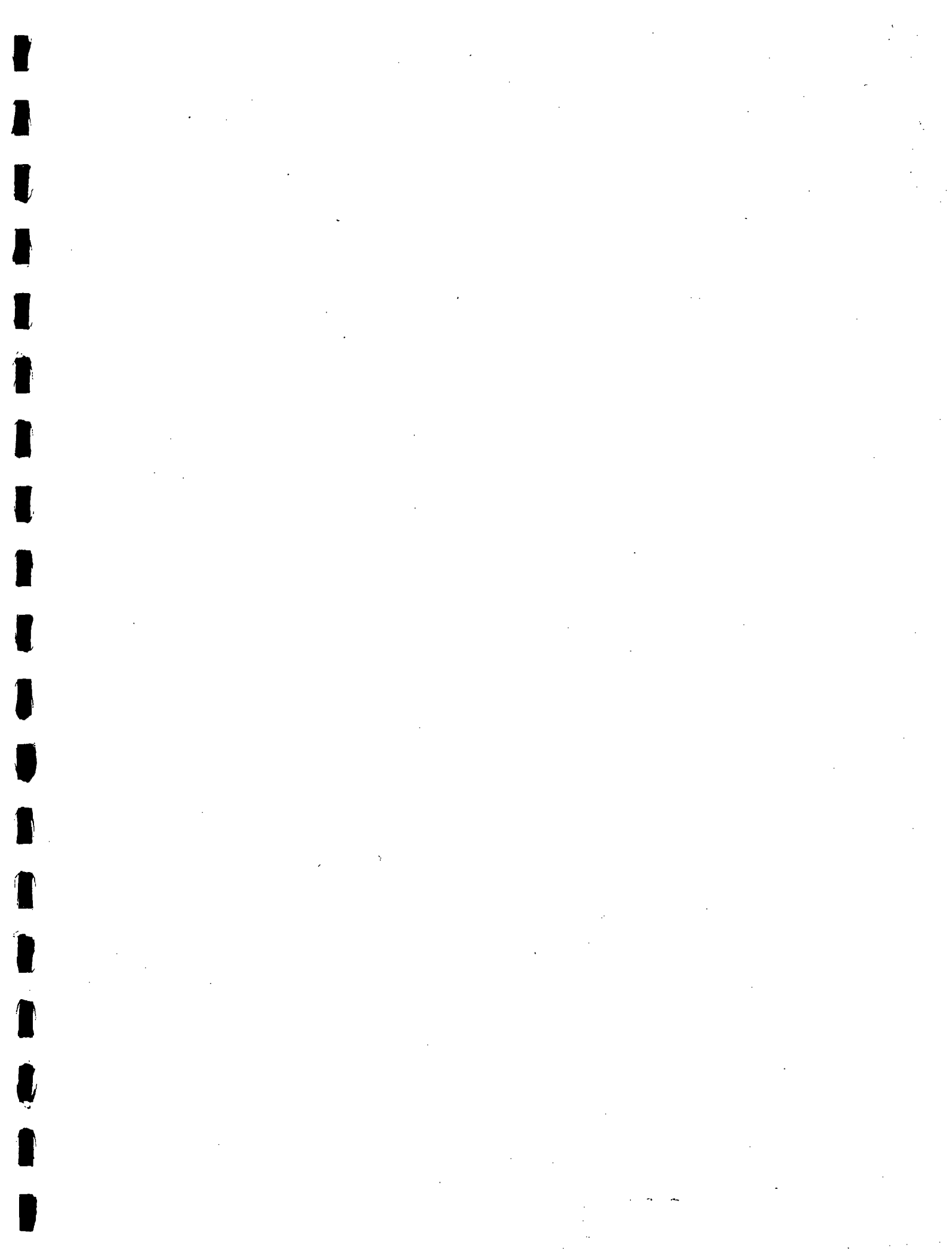
Dollar values shown in this report are based on selling price F.O.B. plant, in Canadian dollars. This selling price represents the value paid by the importer, excluding all freight, packing and insurance costs when specified. All trade discounts, when applicable, are also deducted from the selling price.

**Rounding**

Figures may not add due to rounding.

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## IMPORT ANALYSIS COMPOUND BOWS

### 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 compound bows is based on a detailed examination of Revenue Canada Customs import documents for the period of July, August and September 1989. The following Harmonized System (H.S.) import commodity codes were analyzed:

<u>Description</u>	<u>H.S. Commodity Codes Analyzed</u>
• Archery Equipment:	
• Of wood	9506.99.81.00
• Other	9506.99.89.00

Import statistics for the aforementioned H.S. import commodity codes for 1989 were \$4.6 million, and for the period July, August and September 1989 amounted to \$1.3 million. Only shipments identified as compound bows imported in July, August and September 1989 were captured and analyzed. These shipments amounted to \$310 thousand.

**II. ANALYSIS OF IMPORTS  
COMPOUND BOWS**

**JULY, AUGUST AND SEPTEMBER 1989**

Imports of compound bows for the period July to September 1989, as shown in this report, totalled 2 795 units for a value of \$310 thousand.

**SUMMARY OF IMPORTS  
BY PRICE RANGE**

<u>Price Range</u> (\$)	<u>Quantity</u> (No.)	<u>% of Total</u> <u>Quantity</u>	<u>Value</u> (\$000)	<u>% of Total</u> <u>Value</u>	<u>Average</u> <u>Unit Price</u> (\$)
44.00 to 75.00	626	22	36.8	12	58
75.01 to 105.00	724	26	62.6	20	86
105.01 to 140.00	857	31	102.2	33	120
140.01 and Over	<u>528</u>	<u>21</u>	<u>108.1</u>	<u>35</u>	<u>184</u>
<b>TOTAL</b>	<b>2 795</b>	<b>100</b>	<b>309.8</b>	<b>100</b>	<b>111</b>

For further details refer to Appendix A.

## II. ANALYSIS OF IMPORTS (Cont'd)

### COMPOUND BOWS

#### BY COUNTRY OF ORIGIN

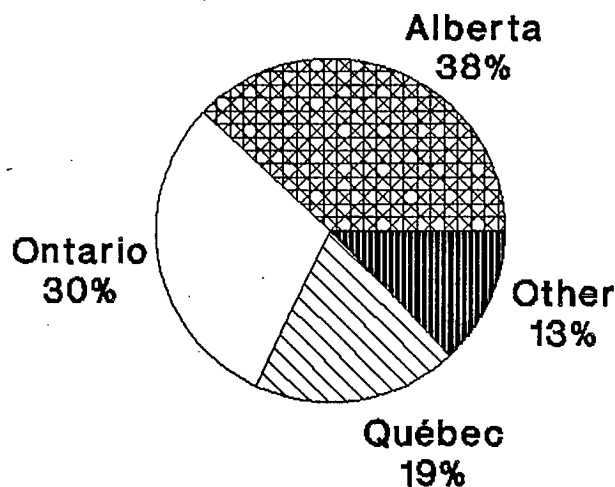
JULY, AUGUST AND SEPTEMBER 1989

During the period analyzed, the United States accounted for all imports of compound bows.

#### BY PROVINCE OF CONSIGNEE

JULY, AUGUST AND SEPTEMBER 1989

Alberta was the major province of consignee accounting for \$117 thousand or 38 per cent of the total value, followed by Ontario with \$95 thousand or 30 per cent and Québec with \$58 thousand or 19 per cent. For further details by province of consignee, refer to Appendix B.



100% = \$310 Thousand

Other provinces include: Saskatchewan, Manitoba, British Columbia, Nova Scotia and New Brunswick.



### IMPORT MARKET CONCENTRATION

There were 26 known consignees/importers of compound bows during the period July, August and September 1989. The top three consignees/importers accounted for \$212 thousand or 69 per cent of the total dollar value of imports. All consignees/importers are listed in alphabetical order in Appendix C.

<u>Principal Consignees/Importers</u> (By Value)	<u>Cumulative Value</u> (\$000)	<u>Cumulative % of Total Value</u>
3	212	69
6	264	85
10	289	93
All Consignees/Importers (26)	310	100

### III. CANADIAN PRODUCTION

Although there are no significant domestic shipments of compound bows in Canada, there are at least two Canadian manufacturers. Statistics Canada does not publish specific data on the production of these products.

### IV. UNITED STATES' IMPORTS

The United States Department of Commerce reports that imports into the United States of all bows and bow parts from all countries during the twelve months of 1989, totalled \$2.3 million. Canada's share of these United States imports totalled \$116 thousand.

APPENDIX A

IMPORTS OF  
COMPOUND BOWS

BY PRICE RANGE

JULY, AUGUST AND SEPTEMBER 1989

<u>Price Range</u> (\$)	<u>Quantity</u> (No.)	<u>Value</u> (\$)	<u>Average Unit Price</u> (\$/Unit)
44.00 to 65.00	423	22 385	52.92
65.01 to 75.00	203	14 452	71.19
75.01 to 85.00	334	27 379	81.97
85.01 to 95.00	287	25 044	87.26
95.01 to 105.00	103	10 226	99.28
105.01 to 115.00	287	31 143	108.51
115.01 to 125.00	333	39 810	119.55
125.01 to 140.00	237	31 261	131.90
140.01 to 160.00	109	16 438	150.81
160.01 to 180.00	271	46 620	172.03
180.01 to 200.00	95	17 665	185.95
200.01 to 235.00	41	9 111	222.22
235.01 to 270.00	65	16 068	247.20
300.00 to 368.00	<u>7</u>	<u>2 230</u>	<u>318.57</u>
TOTAL	2 795	309 830	110.85

APPENDIX B

IMPORTS OF  
COMPOUND BOWS  
BY PROVINCE OF CONSIGNEE  
JULY, AUGUST, AND SEPTEMBER 1989

<u>Province</u>	<u>Quantity</u> (No.)	<u>% of Total</u> <u>Quantity</u>	<u>Value</u> (\$)	<u>% of Total</u> <u>Value</u>
Alberta	979	35	116 784	38
Ontario	982	35	94 580	30
Québec	462	17	58 308	19
Saskatchewan Manitoba	) * 345	12	36 676	12
British Columbia Nova Scotia New Brunswick	) * <u>27</u>	<u>1</u>	<u>3 482</u>	<u>1</u>
TOTAL	2 795	100	309 830	100

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\* Aggregated to preserve confidentiality of Canadian importers.

**CANADIAN IMPORTERS**

**COMPOUND BOWS**

**JULY, AUGUST AND SEPTEMBER 1989**

Importers of compound bows during the period of July, August and September 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>
Archery Only Co. Ltd.	Delta, B.C.	Optex Corp.	Don Mills, Ont.
Beak's Hunting Fishing Supply Co. Ltd.	Winnipeg, Man.	Orlean's Int'l. Inc.	Montréal, Qué.
Boormans Archery Ltd.	New Westminster, B.C.	Pearson, Ben Canada Sports, Inc.	Montréal, Qué.
Bromley Marketing Co. Ltd.	Brantford, Ont.	Porcupine Creek Supply, Division of 264371 Alberta Ltd.	Calgary, Alta.
Browning Canada Sports Ltd.	Montréal, Qué.	Prairie Flats Archery and Sporting Goods Co. Ltd.	Medicine Hat, Alta.
Cara Distributing Co. Ltd.	Bow Island, Alta.	PRT Nature Sports Ltée	Plessisville, Qué.
Doiron Enterprises Ltd.	St. John, N.B.	Savana Div. of 123729 Canada Inc.	Montréal, Qué.
Gateway Grocery Ltd.	Seven Sisters Falls, Man.	Silver Arrow Archery Lanes Ltd.	Winnipeg, Man.
Larrys Sport Shop Ltd.	Grand Prairie, Alta.	South Nation Archery Supply Ltd.	Winchester, Ont.
Martin Archery of Canada Co. Ltd.	Regina, Sask.	Sport Marcel Langlois Inc.	Sherbrooke, Qué.
Mir Arc Inc.	Brossard, Qué.	Sports Modernes Ltée	Trois Rivières, Qué.
Monsen's Sporting Goods Ltd.	Peterborough, Ont.	Visscher Archery Ltd.	Calgary, Alta.
Nova Archery Supplies Ltd.	Yarmouth, N.S.	Western Canada Archery Ltd.	Cranbrook, B.C.

**FOREIGN EXPORTERS TO CANADA  
COMPOUND BOWS**

**JULY, AUGUST AND SEPTEMBER 1989**

Major exporters to Canada of compound bows are listed below in descending order of dollar value. Names are as shown on the shipping documents. These exporters accounted for 96 per cent of the total analyzed value of \$310 thousand.

<u>Name</u>	<u>Address</u>	<u>Value of Exports to Canada</u> (\$000)	
Precision Shooting Equipment Co. Indian Industries Inc.	Tucson, AZ Evansville, IN	) )*	158
Martin Archery Inc. Bear Archery Inc. Pro Line Co.	Walla Walla, WA Gainesville, FL Hasting, MI	) )* )	77
Pearson, Ben Mfg. Co. Golden Eagle Archery Alpine Archery	Pine Bluff, AR Farmington, NY Lewiston, ID	) )* )	41
Browning Arms Co. Kinseys Archery Products Inc. McPherson Archery Inc.	Arnold, MO Mt. Joy, PA Austin, MN	) )* )	22

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\* Aggregated to preserve confidentiality of Canadian importers.

**CANADIAN SUPPLIERS  
COMPOUND BOWS**

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.

BOSS

Canadian companies are arranged in alphabetical order.

Archery Equipment

<u>Name</u>	<u>Address</u>
*Excalibur Crossbow Inc	Kitchener, Ont.
*North Country Archery Inc.	Ginew, Man.
*Productions Topo Inc., Les	Ste. Thérèse, Qué.

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\* Company engaged in export trade

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 SUPPLIERS (Cont'd)**

CANADIAN TRADE INDEX

Canadian companies are arranged in alphabetical order.

Archery Equipment

<u>Name</u>	<u>Address</u>
*Checkmate Archery Mfg. Ltd.	Abbotsford, B.C.
Edwards-Day Inc.	Downsview, Ont.
*Everlite Luggage Mfg. Co. Ltd.	Toronto, Ont.
Mate Quality Products Inc.	Acton, Ont.

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\* 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

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

<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>
	Archery Equipment			
9506.99.81	-- Of wood On and after January 1, 1991	9.2%	6%	7.3% 6.4%
9506.99.89	-- Other On and after January 1, 1991	11.2%	7%	8.9% 7.8%

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) 954-6927  
Fax.: (613) 954-2509

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  
Fax.: (613) 996-9709



APPENDIX G

**MARKET SUMMARY - ARCHERY EQUIPMENT**

In 1989, the Canadian market for archery equipment (excluding toy sets) is estimated at \$7.0 - \$7.5 million at wholesale cost level. Imported equipment represents over 60 per cent of this market with the USA being the source of all imported compound bows and over 90 per cent of total archery equipment imports.

The Canadian archery market has had quite slow growth and there is no indication that this trend will change to any significant degree. The market can be divided into three main subsectors - hunting, recreational, and competition. In the USA and Canada, the hunting subsector is the largest segment of the market. While this segment continues to grow in the USA, it does not have the same degree of popularity in Canada and growth is more moderate. The recreational market consists primarily of activities organized by schools and clubs. This segment is undergoing moderate growth. The competition segment continues to remain a small part of the overall market.

Although all the major producers of archery equipment are located in the USA, the Canadian industry has a number of small producers of targets and other accessories. However, bow manufacturing is limited to 5 relatively small producers of which one specializes in crossbows. There are some exports by the archery equipment industry but the total value is less than \$1.0 million and shipped mainly to Europe.

In terms of growth opportunities, the hunting market is dominated by large American producers who sell primarily through specialty outlets. Licencing and/or joint ventures would appear to be best methods for new or existing producers to consider.

Although the recreational/school market segment is more price sensitive and is thus susceptible to US competition with their economies of scale, most major American manufacturers prefer to focus on the hunting segment. As a result, the recreational market does not encounter the same degree of foreign pressure and may provide an opportunity for Canadian producers who are prepared to deliver a well made product and a high level of service.