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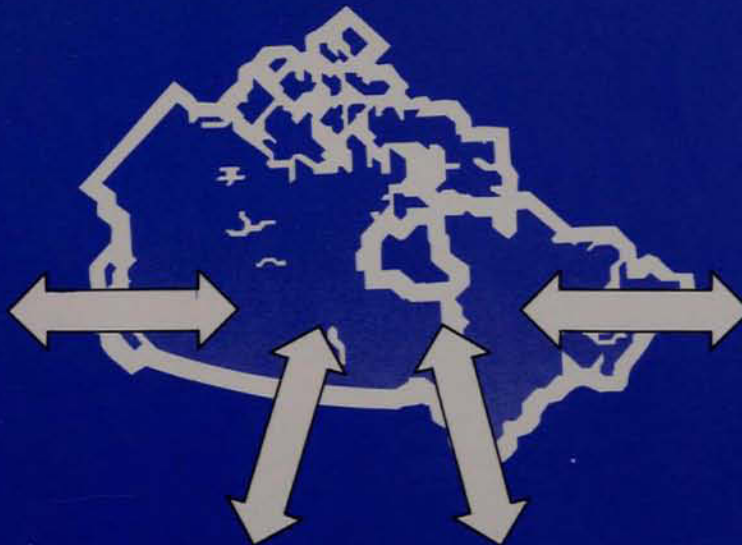
MARKET INTELLIGENCE

**SELF - PROPELLED
FERTILIZER SPRAYERS**

(SPRAYING VEHICLES)

1989

Pub. No.: 90062-IA November 1990



Canada



ID. 90-0159

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FOR MORE INFORMATION PLEASE CONTACT:

Market Intelligence Division
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Industry, Science and Technology Canada
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Ottawa, Ontario
K1A 0H5
Tel.: (613) 954-3226

REFERENCE SOURCES

Industry, Science and Technology Canada
Statistics Canada, Tel.: (613) 951-9647
Revenue Canada, Tel.: (613) 954-6894
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) 954-6894

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

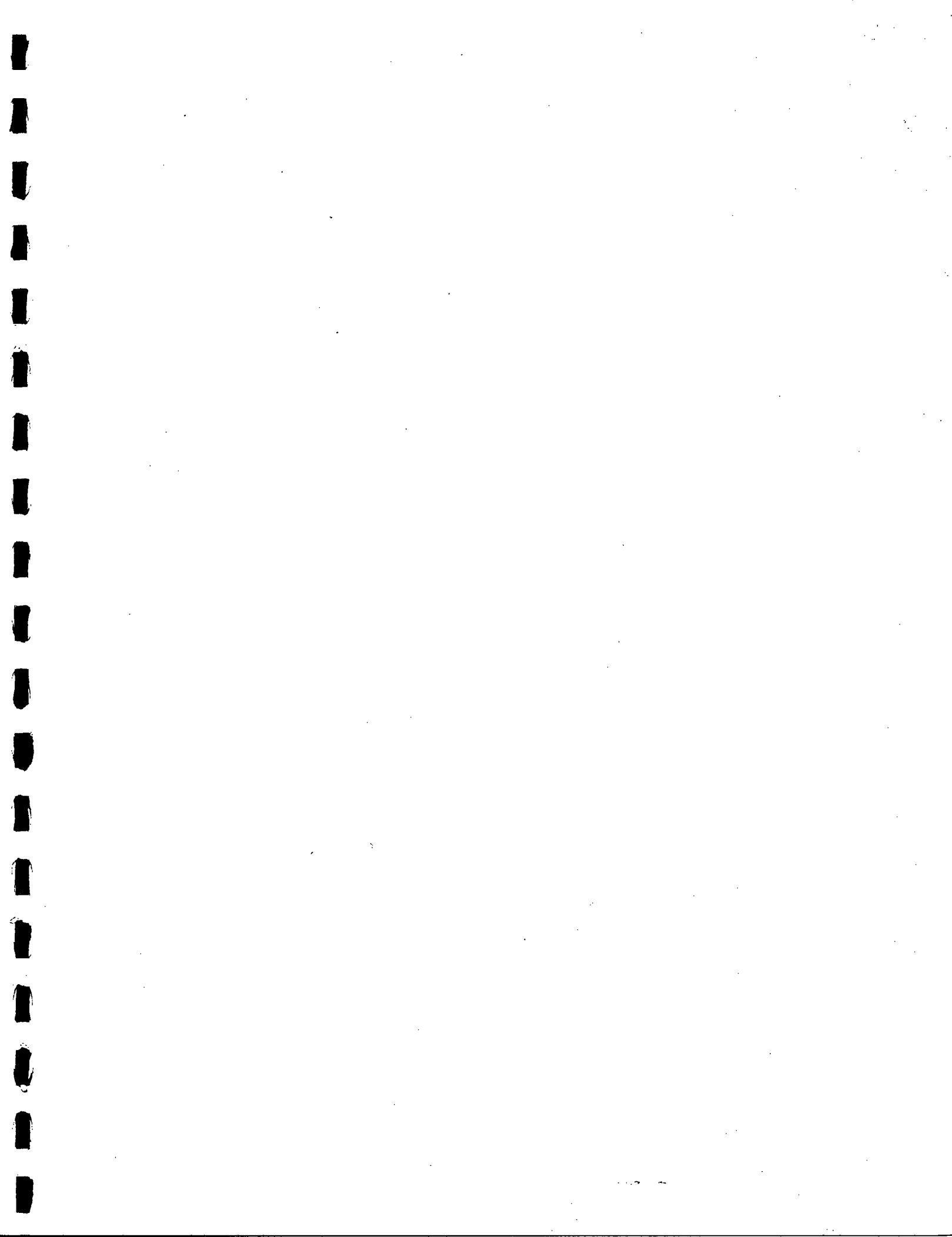
Dollar values shown in this report are based on selling price F.O.B. plant, in Canadian dollars. This selling price represents the value paid by the importer, excluding all freight, packing and insurance costs when specified. All trade discounts, when applicable, are also deducted from the selling price.

Rounding

Figures may not add due to rounding.

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IMPORT ANALYSIS

SELF-PROPELLED FERTILIZER SPRAYERS

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 self-propelled fertilizer sprayers is based on a detailed examination of Revenue Canada Customs import documents for the year 1989. The following Harmonized System (H.S.) import commodity code was analyzed:

<u>Description</u>	<u>H.S. Commodity Code Analyzed</u>
Special purpose motor vehicles, other than those principally designed for the transport of persons or goods (for example, breakdown lorries (wreckers), crane lorries (mobile cranes), fire fighting vehicles, concrete mixer lorries (concrete-mixers), road sweeper lorries (road sweepers), spraying lorries (spraying vehicles), mobile workshops, mobile radiological units). (87.05) °Other (8705.90) ---Spraying lorries (spraying vehicles) for spreading dry or liquid fertilizer or sludge for agricultural use	8705.90.10.00

Import statistics for the above import commodity code for the period analyzed amount to \$4.2 million. Only \$3.2 million was available for analysis at the time of this study. For purposes of this analysis, only those shipments described as spraying vehicles were studied. Of the \$3.2 million analyzed, \$1.7 million were identified as self-propelled fertilizer sprayers. The differences are explained in Appendix G.

The subsequent analysis deals only with the \$1.7 million, i.e. those shipments described as spraying vehicles.

Not included in this analysis are the following H.S. commodity codes with their values reported by Statistics Canada for the year 1989:

<u>H.S. Code</u>		<u>Quantity</u> (No.)	<u>Value</u> (\$000)
8432.40.10	-Manure spreaders and fertilizer distributors		
8432.40.10.00	---Manually operated portable manure spreaders and fertilizer distributors	104 259	2 229
8432.40.20.00	---Other manure spreaders; other fertilizer distributors	3 757	13 475

II. ANALYSIS OF IMPORTS

SELF-PROPELLED FERTILIZER SPRAYERS (SPRAYING VEHICLES)

Imports of self-propelled fertilizer sprayers amounted to \$1.7 million for 1989. (Note difference from figure published by Statistics Canada as explained in Appendix G.) The country of origin for all imports was the U.S.A.

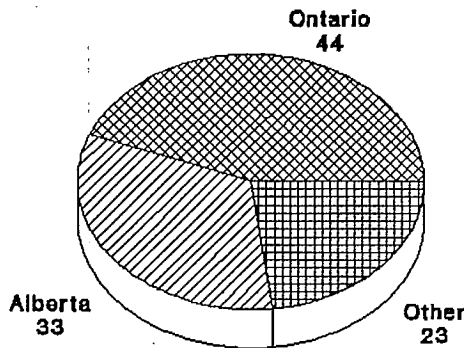
Of the total imports, 78 per cent of the value consisted of new sprayers, while 22 per cent were used units. Details on imports by price range are shown in Appendix A.

SUMMARY OF IMPORTS

	<u>Quantity</u> (No.)	<u>Value</u> (\$)	<u>Average</u> <u>Unit Price</u> (\$)
New units	12	1 289 715	107 476
Used units	6	<u>361 572</u>	60 262
		1 651 287	

BY PROVINCE OF CONSIGNEE - 1989

Ontario was the major province of consignee, accounting for \$719 thousand or 44 per cent of the total import value. The Western provinces together accounted for over \$900 thousand. See imports by province of consignee in Appendix B.



100 % = \$ 1.7 Million

Other: Includes Manitoba and Saskatchewan

II. ANALYSIS OF IMPORTS (Cont'd)
**SELF-PROPELLED FERTILIZER SPRAYERS
(SPRAYING VEHICLES)**

IMPORT MARKET CONCENTRATION

<u>Principal Consignees/Importers</u> (By Value)	<u>Cumulative Value</u> (\$000)	<u>Cumulative % of Total Value</u>
3	718	43
6	1 081	65
10	1 490	90
All consignees/importers (14)	1 651	100

There were 14 known consignees/importers of products described in this report during 1989. The top six consignees/importers accounted for \$1.1 million or 65 per cent of the total dollar value of imports. All consignees/importers are listed in alphabetical order in Appendix C.

III. CANADIAN PRODUCTION

SELF-PROPELLED FERTILIZER SPRAYERS (SPRAYING VEHICLES)

Statistics Canada reports shipments of all types of fertilizer machinery and sprayers by Canadian manufacturers during the years 1985 and 1986 (latest year available) as follows:

<u>Description</u>	<u>1985</u>			<u>1986</u>		
	<u>Establishments</u> (No.)	<u>Quantity</u>	<u>Value</u> (\$000)	<u>Establishments</u> (No.)	<u>Quantity</u>	<u>Value</u> (\$000)
Fertilizer machinery and equipment	16	∞	21 783	18	∞	X
Manure spreaders	10	∞	19 552	16	∞	18 319
Field sprayers, mounted	10	∞	7 153e	9	2 392E	5 549e
Field sprayers, trailer type	6	5 053	13 890	7	2 994E	15 092
Plant protection machinery and equipment, n.e.s.*	5		1 490	1		X

∞ - Figures not available
 X - Confidential
 * - Not elsewhere specified

The following symbols indicate the percentage of each value or quantity accounted for by estimates.

<u>Symbol</u>	<u>% Estimated</u>
None	0 - 30
e	31 - 60
E	61 - 100

Any enquiries and/or comments regarding Canadian production should be directed to:

Statistics Canada
 Census of Manufactures Section
 Industry Division
 Ottawa, Ontario
 K1A 0T6
 Tel.: (613) 951-3523

Source: Catalogue # 42-250, annual, "Machinery Industries (Except Electrical Machinery)".

IV. MARKET OVERVIEW

SELF-PROPELLED FERTILIZER SPRAYERS (SPRAYING VEHICLES)

Self-propelled fertilizer sprayers are sold to three types of users:

- fertilizer dealers
- custom operators
- farmers with high-value crops (e.g. tobacco or tomatoes) or large scale operation

These sprayers are used principally in tall crops (e.g. corn or tobacco) which cannot be sprayed with pull-type sprayers as spray booms and tractor axles would provide insufficient clearance. In addition, some are equipped with large balloon tires to provide flotation on fields that are wet or inadequately drained.

The market for self-propelled sprayers is a small specialized niche of the sprayer industry and would not exceed 100 units in most years. It has been particularly depressed in the 1980's as a result of low commodity prices (particularly for corn) and the reduced demand and price for tobacco. On the positive side, self-propelled sprayers are increasing in use in Western Canada for spraying cereal grain crops, and in Eastern Canada for pastures.

Usually, self-propelled sprayers are sold directly to users by manufacturers as the volume is insufficient to justify the establishment of dealers with appropriate after sales service and spare parts.

Success in manufacturing this type of sprayer would likely be dependent on developing a supply relationship with a fertilizer manufacturer and/or a number of large custom operators.

IMPORTS OF
SELF-PROPELLED FERTILIZER SPRAYERS
(SPRAYING VEHICLES)

BY PRICE RANGE - 1989

<u>Type</u>	<u>Price Range</u> (\$000)	<u>Quantity</u> (No.)	<u>Value</u> (\$)	<u>Average</u> <u>Unit Price</u> (\$)
New:	65 to 100	4	349 976	87 494
	Over 101	<u>8</u>	<u>939 739</u>	<u>117 467</u>
TOTAL		12	1 289 715	107 476
Used:	-	<u>6</u>	<u>361 572</u>	<u>60 262</u>
GRAND TOTAL		18	1 651 287	91 738

IMPORTS OF
SELF-PROPELLED FERTILIZER SPRAYERS
(SPRAYING VEHICLES)

BY PROVINCE OF CONSIGNEE - 1989

<u>Province</u>	<u>Value</u> (\$)	<u>% of Total</u> <u>Value</u>
Ontario	719 187	44
Alberta	545 417	33
Manitoba)	<u>386 683*</u>	<u>23*</u>
Saskatchewan)		
TOTAL	1 651 287	100

* Aggregated to preserve confidentiality of Canadian importers.

CANADIAN IMPORTERS
SELF-PROPELLED FERTILIZER SPRAYERS
(SPRAYING VEHICLES)

Importers of self-propelled fertilizer sprayers during 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>
Ag Marketing Services Ltd.	Hyde Park, Ont.
Bee-Line Mfg.	Kindersley, Sask.
Cargill Gain Co. Ltd.	McGregor, Ont.
Coldsprings Agri Services Ltd.	Norwich, Ont.
Cypress Colony Inc.	Cypress River, Man.
Hazzards Farm Services Ltd.	Wallaceburg, Ont.
International Fertilizer System Inc.	Calgary, Alta.
La Coop Pte-Aux Roches	Stoney Point, Ont.
Manikel Ag Services Ltd.	St. Jean, Man.
Marvin & Allan Olson Inc.	Bienfait, Sask.
Merke Bros. Ltd.	Beausejour, Man.
Scotland Agromart Ltd.	Scotland, Ont.
Shur Gro Farm Services Ltd.	Brandon, Man.
Summers Agricultural Services Ltd.	Calgary, Alta.

APPENDIX D

FOREIGN EXPORTERS TO CANADA
SELF-PROPELLED FERTILIZER SPRAYERS
(SPRAYING VEHICLES)

U.S. exporters to Canada of self-propelled fertilizer sprayers 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 Exports to Canada</u> (\$000)
Ag-Chem Equip. Co. Ltd.	Jackson, MN	569
Loral Inc. Willmar Mfg.	Benson, MN Willmar, MN	617*
National Agri Services	Fargo, ND	361*
Clark Sales & Services JLG Industries Inc. Farmers Union Oil Co. Lakeview Hutterian Brethren Inc.	Wakarusa, KS McConnellsburg, PA Mohall, ND Lake Andes, SD	104*

* Aggregated to preserve confidentiality of Canadian importers.

CANADIAN SUPPLIERS

SELF-PROPELLED FERTILIZER SPRAYERS
(SPRAYING VEHICLES)

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. A company does not necessarily carry the particular products described in this report.

Sprayers, Agricultural, New

<u>Name</u>	<u>Address</u>
Accu Agricultural Implements Ltd.	Senlac, Sask.
Adja Industries Ltd.	Calgary, Alta.
*AG Shield Mfg. Div. McCrea Farms Ltd.	Benito, Man.
*Andpro Ltd.	Waterford, Ont.
*Australian Canadian Agricultural Mach.	Coaldale, Alta.
*BM Precision Industries Inc.	Aylmer, Ont.
*Brandt Industries Ltd.	Regina, Sask.
Delaware Pump & Parts Ltd.	Delaware, Ont.
Delorme & Fils Inc.	Farnham, Qué.
*Douglas Mfg. Inc.	Winkler, Man.
Even-Spray and Chemicals Ltd.	Winnipeg, Man.
*Flexi-Coil Ltd.	Saskatoon, Sask.
Forestworld Inc.	Vancouver, B.C.
G&C Bechard Sales & Services Ltd.	Straffordville, Ont.
Grehi Mfg. Ltd.	Brandon, Man.
*Hardi Inc.	London, Ont.
Harmon Int. Industries Inc.	Saskatoon, Sask.
Inland Steel & Forgings Ltd.	Winnipeg, Man.
*Innovative Equipment Inc.	Saskatoon, Sask.
J.B. & D. Company Ltd.	Unionville, Ont.
*Kirchner Machine Ltd.	Lethbridge, Alta.

* Company engaged in export trade

CANADIAN SUPPLIERS (Cont'd)

SELF-PROPELLED FERTILIZER SPRAYERS
(SPRAYING VEHICLES)

Sprayers, Agricultural, New

<u>Name</u>	<u>Address</u>
*Lau-Rence Liquids Ltd. Laurier Mfg. Ltd.	Brunkild, Man. Laurier, Man.
*M.K. Rittenhouse & Sons Ltd. Mid-West Agri Ltd. Munckhof Mfg.	St. Catharines, Ont. Stonewall, Man. Oliver, B.C.
*Okanagan Turbo Sprayers Ltd. Pulverisateur M-S Inc.	Penticton, B.C. Drummondville, Qué.
*Renn-Vertec Inc. Richardson Great Northern Mfg. Inc.	Vermillion, Alta. Winnipeg, Man.
*Smith-Roles Ltd. *Spray-Air Canada Ltd. Spray-Tech Systems Ltd.	Saskatoon, Sask. Carseland, Alta. Vonda, Sask.
*Techniferme Inc. Thiessen Industries and Farm Supplies Valley Mobile Welding Div. of Valley Ind.	Vanier, Qué. Glanella, Man. Lawrencetown, N.S.
*Valmar Airflo Inc. *Wigler Industries Ltd.	Elie, Man. Saskatoon, Sask.

* Company engaged in export trade

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

Business Opportunities Sourcing System
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)

SELF-PROPELLED FERTILIZER SPRAYERS
(SPRAYING VEHICLES)

CANADIAN TRADE INDEX

Sprayers, Hand and Power

Canadian companies are arranged in alphabetical order. A company does not necessarily carry the products described in this report.

<u>Name</u>	<u>Address</u>
Aro Canada Inc.	Rexdale, Ont.
*Aylmer Toolcraft Ltd.	Aylmer West, Ont.
BWS Mfg. Ltd.	Centreville, N.B.
Balazs Enterprises Ltd.	Tillsonburg, Ont.
Binks Mfg. of Canada Ltd.	Toronto, Ont.
Bourgault, F.P., Industries Air Seeder Div. Ltd.	St. Brieux, Sask.
*Brandt Industries Ltd.	Regina, Sask.
Delhi Foundry and Farm Mach. Ltd.	Delhi, Ont.
Delorme, Hector & Sons Inc.	Farnham, Qué.
*Flexi-Coil Ltd.	Saskatoon, Sask.
Inland Steel & Forgings Ltd.	Winnipeg, Man.
JB & D Co. Ltd.	Unionville, Ont.
Leigh Metal Products Ltd.	London, Ont.
Melnor Mfg. Ltd.	Brantford, Ont.
*Okanagan Turbo Sprayers Ltd.	Penticton, B.C.
*Renn-Vertec Inc.	Vermilion, Alta.
Richardson Great Northern Mfg. Inc.	Winnipeg, Man.
Rittenhouse, M.K., & Sons Ltd.	St. Catharines, Ont.
Shamrock Chemicals Ltd.	London, Ont.
*Smith-Roles Ltd.	Saskatoon, Sask.
*Unic Int. Corp.	Markham, Ont.
*Vicon Inc.	Cambridge, Ont.
*Wigler Industries Ltd.	Saskatoon, Sask.

* 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

CANADIAN AND FOREIGN TARIFFS

**SELF-PROPELLED FERTILIZER SPRAYERS
(SPRAYING VEHICLES)**

Self-propelled fertilizer spraying vehicles included in this analysis were 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>
8705.90.10	Special purpose motor vehicles, other than those principally designed for the transport of persons or goods (for example, breakdown lorries (wreckers), crane lorries (mobile cranes), fire fighting vehicles, concrete mixer lorries (concrete-mixers), road sweeper lorries (road sweepers), spraying lorries (spraying vehicles), mobile workshops, mobile radiological units). ---Spraying lorries (spraying vehicles) for spreading dry or liquid fertilizer or sludge for agricultural use	Free	Free	Free

TARIFF ARRANGEMENTS AND FOREIGN COUNTRIES OF EXPORT

Exporting countries which qualify for the Most Favoured Nation tariff treatment: United States.

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) 954-6894
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

RECONCILIATION

Imports of self-propelled fertilizer sprayers during the year 1989, as reported on documents analyzed in this report, amounted to \$1.7 million. The value reported in this import analysis does not correspond to the official Statistics Canada figure of \$4.2 million for various reasons. Reconciliation of the two total figures is as follows:

<u>Values Accounted For</u>	<u>Value</u> <u>(\$000)</u>
Documents referring to products which should have been classified elsewhere	1 502
Missing documents	1 056
Total values reported in this import analysis	<u>1 651</u>
Total values accounted for as above	4 209
Total values published by Statistics Canada	4 209