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no.
84002-F

IMPORT ANALYSIS

DOG AND CAT FEED

OCTOBER 1982 TO SEPTEMBER 1983



Government
of Canada

Gouvernement
du Canada

Regional Industrial
Expansion

Expansion industrielle
régionale

Canada

Pub. No. 84002 - F
I.D. 1262
May 30, 1984

DOG AND CAT FEED

OCTOBER 1982 TO SEPTEMBER 1983



Further information available from:

Market Information and Analysis Division
Market Development Branch
Regional Industrial Expansion
Ottawa, Canada, K1A 0H5
Tel: (613) 995-8216

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- REFERENCES:
- (1) Customs Tariff: Item 71110-1
 - (2) Canadian International Trade Classification (Cat. #65-502E, Statistics Canada)
 - (3) Imports by Commodities (Cat. #65-007, Statistics Canada) Commodity Code 157-69

SECTION I

SCOPE OF ANALYSIS

This report is based on a detailed analysis of imports of dog and cat feed during the period October 1982 to September 1983. These products are included in Statistics Canada Import Commodity Codes:

157-69(20) Dog and cat feeds, complete, canned

157-69(31) Dog and cat biscuits, whole or kibbled

157-69(90) Dog and cat feeds, complete, except canned, not elsewhere specified

The documents examined were selected by a sampling technique, see Section IV.

SECTION II

RECONCILIATION

The value reported in this analysis does not correspond to official Statistics Canada figures for various reasons.

Reconciliation of the two total figures is explained as follows:

<u>Values accounted for</u>	<u>Value</u> <u>(\$,000)</u>
Documents not available for analysis	387
<u>Difference in Definition of Value</u>	
Market Development Branch uses actual selling price F.O.B.; Statistics Canada values are for customs duty Purposes	165
Total values analyzed in this report	<u>23,330</u>
Total values accounted for as above	23,882
Total values published by Statistics Canada	23,560
Total difference = \$322,000 (= + 1.4%)	

Standard deviation of total value due to sampling is approximately \$480,000. Therefore the difference of total value can be attributed to sampling.

NOTE: Statistics Canada's figures are subject to revision; changes will be reflected in the normal way: i.e., "pink sheets", which are located in the front section of Catalogue #65-007

SECTION III

ANALYSIS OF IMPORTS

Imports of dog and cat feed reported on documents examined during the period October 1982 to September 1983 amounted to a total value of \$23,329,508.

The analysis indicates that cat feed accounted for 55 per cent of the total value; with dog feed accounting for 39 per cent of the total value. The remaining six per cent was specialty diet feed for both cats and dogs.

Of the total \$12.8 million cat feed imported, 67 per cent was in cans sized 6 and 6.5 ounces, with an average unit price of 35¢ per tin. The majority of these products (68 per cent) were composed in whole or in part of fish, with tuna being the largest single base ingredient.

Moist cat food was mostly contained in packages of 1 ounce and 1.5 ounces, averaging 22¢ per package. Beef and beef/flavour was the largest composition accounting for 36 per cent of total imports of moist. Cat food described as being dry accounted for 26 per cent of the total value. Seventy-five per cent of the dry cat food was in containers sized 500 g, 1 kg and 1.82 kg averaging 84¢ per package. Liver base ingredients was the major composition accounting for 36 per cent of the value.

Dog feed imports were valued at \$9.0 million. Canned feed accounted for 3 per cent of total with container sizes ranging from 14.5 oz to 700 g at an average unit price per tin of 36¢. Beef composition was the largest single base ingredient accounting for 38 per cent of canned feed values.

Moist dog feed was valued at \$153 thousand or 2 per cent of the total value, with beef being the only composition.

Dry feed was the major type of dog feed imported accounting for approximately \$7.5 million or 83 per cent of the total imports of dog feed. Fifty-nine per cent of this product was in containers sized 8 kg, 20 kg, 40 lb and 44 lb, with average price per package ranging from \$4.48 for the 8 kg size to \$11.19 for the 20 kg size and \$12.19 for the 40 lb and 44 lb sizes. Composition for dry dog feed was not indicated on information documents.

Dog feed described as biscuits amounted to \$852 thousand or 11 per cent of the total value. The largest containers in terms of percentage of value were 22 lb and 25 lb accounting for 38 per cent. Beef was the largest single identifiable base composition, 12 per cent of the value for biscuits.

Sixty-three per cent of all shipments included in this analysis are apparently, in Statistics Canada's terminology "affiliated transactions", i.e. shipments between affiliated firms.

Full details of the analysis are provided in the following tables.

NOTES: * - Aggregated in order to preserve confidentiality.

Container sizes shown in this report are the actual sizes indicated on the information documents analyzed.

(1) - Less than one per cent.

Not Shown - Products not described on information documents.

All percentage figures are rounded.

Dollar values shown 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.

The above notes apply to all tables.

TABLE 1 - SUMMARY

IMPORTS OF DOG AND CAT FEED - BY COMMODITY AND CONTAINER SIZE

OCTOBER 1982 TO SEPTEMBER 1983

<u>Commodity Description</u>	<u>Value</u> <u>(\$ Millions)</u>
Cat Food: Canned	8.9
Dry	3.3
Other	<u>0.6</u>
Total - Cat Food	12.8
Dog Food: Canned	0.3
Dry	7.4
Biscuits	0.9
Other	<u>0.4</u>
Total - Dog Food	9.0
Specialty Products: Canned	1.2
Dry	<u>0.2</u>
Total - Specialty Products	1.5
TOTAL - ALL PRODUCTS	<u>23.3</u>

TABLE 1

IMPORTS OF DOG AND CAT FEED - BY COMMODITY AND CONTAINER SIZE

OCTOBER 1982 TO SEPTEMBER 1983

Commodity Description	Container (Size)	Packages (No.)	Value (\$)	REGION OF ENTRY			
				East of Ontario (% of Value)	Ontario	West of Ontario	
<u>Cat Food</u>	Canned:	(oz)					
		6 and 6.5 *	24,649,176	8,644,429	9	58	33
		7, 12 and 15 *	175,752	100,876	-	89	11
		Not Shown	-	211,557	-	49	51
				8,956,862			
	Moist:	(oz and g)					
		1 oz and 1.5 oz *	2,495,496	549,463	6	51	43
		2 oz, 3 oz and 85 g *	27,869	4,741	-	-	100
			2,523,365	554,204			
	Dry:	(g and kg)					
		500 g, 1 kg and 1.82 kg *	2,637,244	2,216,334	6	46	48
		2 kg	206,270	509,038	1	19	80
		4 kg, 8 kg, 9.07 kg and 10 kg *	40,850	220,193	-	53	47
			2,884,364	2,945,565			
		(1b)					
		1, 2, 4.5 and 5 *	3,340	3,242	3	4	93
		4	21,670	66,554	-	65	35
		8 and 10 *	6,750	50,198	-	12	88
		19.5 and 21 *	880	2,874	-	47	53
	20	11,683	86,618	5	7	88	
	25 and 50 *	11,450	125,520	-	91	9	
	-	-	50,006	30	55	15	
			385,012				
Total - Dry			3,330,577				
Not Shown	(g)						
	25	-	6,160	-	100	-	
TOTAL - CAT FOOD			12,847,803				

TABLE 1

(Continued)

IMPORTS OF DOG AND CAT FEED - BY COMMODITY AND CONTAINER SIZE

OCTOBER 1982 TO SEPTEMBER 1983

Commodity Description	Container (Size)	Packages (No.)	Value (\$)	REGION OF ENTRY		
				East of Ontario (% of Value)	Ontario	West of Ontario
<u>Dog Food</u>						
Canned	(oz and g) 14.5 oz, 15 oz, 15.5 oz & 700 g *	768,112	278,854	-	55	45
Moist	Not Shown	-	153,414	96	-	4
Dry:	(kg)					
	2, 2.27 and 4 *	253,790	446,930	-	51	49
	8	319,851	1,431,670	-	16	84
	10	32,520	202,824	-	12	88
	11.34, 16, 18, 18.14 & 22.68 *	84,422	964,026	-	18	82
	20	162,696	1,821,634	-	23	77
		853,279	4,867,084			
	(1b)					
	1, 2, 3, 4 and 4.5 *	6,440	12,986	1	78	21
	5	38,120	55,540	-	13	87
	7.5, 15 and 22 *	4,600	15,750	17	24	59
	8	6,585	35,522	-	35	65
	10	28,217	144,245	-	77	23
	20	9,035	75,605	-	22	78
	25	40,377	405,128	-	50	50
	40 and 44 *	97,060	1,183,940	10	35	55
	50	22,635	263,674	-	18	82
	-	-	423,600	11	1	88
			2,615,990			
Total - Dry			7,483,074			
Biscuits:	(1b and kg)					
	1kg and 3.25 1b *	-	211,345	-	100	-
	5 1b, 10 1b and 15 1b *	9,730	27,050	36	64	-
	22 1b and 25 1b *	30,190	324,150	-	81	19
	-	-	289,896	1	99	-
			852,441			

TABLE 1

(Continued)

IMPORTS OF DOG AND CAT FEED - BY COMMODITY AND CONTAINER SIZEOCTOBER 1982 TO SEPTEMBER 1983

<u>Commodity Description</u>	<u>Container (Size)</u>	<u>Packages (No.)</u>	<u>Value (\$)</u>	<u>REGION OF ENTRY</u>		
				<u>East of Ontario (% of Value)</u>	<u>Ontario</u>	<u>West of Ontario</u>
<u>Dog Food</u>						
Not Shown	(oz and g) 5 oz, 625 g, 750 g and 1000 g *	-	195,860	-	99	1
	-	-	48,867	91	3	6
			244,727			
TOTAL - DOG FOOD			9,012,510			
<u>Specialty Products</u>						
<u>Dog and Cat Diet Food</u>	(oz)					
Canned	7.5, 15, 15.5 and 15.75 *	2,427,024	1,221,050	6	83	11
	(1b)					
Dry	4, 10, 12, 25 and 44 *	22,398	248,145	1	83	16
TOTAL - SPECIALTY PRODUCTS			1,469,195			
GRAND TOTAL			23,329,508			

TABLE 2 - SUMMARY

IMPORTS OF DOG AND CAT FEED - BY COMMODITY AND COMPOSITION

OCTOBER 1982 TO SEPTEMBER 1983

<u>Commodity Description</u>		<u>Composition</u>	<u>Value</u> (\$,000)	<u>% of</u> <u>Value</u>	
<u>Cat Food</u>	Canned:	Fish/Seafood		68	
		Liver		12	
		Beef		7	
		Not Shown		13	
				<u>8,957</u>	100
	Moist:	Beef			36
		Liver			26
		Chicken			19
		Tuna			1
		Not Shown			18
				<u>554</u>	100
	Dry:	Liver			36
		Fish			25
		Beef			18
		Meat/Milk/Fish/Flavor			6
Chicken				(1)	
Not Shown				14	
			<u>3,331</u>	100	
<u>Dog Food</u>	Canned:	Beef		38	
		Rabbit		23	
		Other		20	
		Not Shown		19	
				<u>279</u>	100
	Moist	Beef		153	100
	Dry	Not Shown		7,483	100
	Biscuits:	Beef			12
		Others			12
		Not Shown			76
				<u>852</u>	100
	Not Shown:	Liver			17
		Not Shown			83
				<u>245</u>	100
<u>Specialty</u> <u>Products</u>	Canned & Dry	Not Shown	1,469	100	

TABLE 2

IMPORTS OF DOG AND CAT FEED - BY COMMODITY AND COMPOSITION

OCTOBER 1982 TO SEPTEMBER 1983

<u>Commodity Description</u>		<u>Composition</u>	<u>Value</u> (\$)	<u>% of</u> <u>Value</u>	
<u>Cat Food</u>	Canned:	Fish/Liver))	
		Mackere1))	
		Seafood))	
		Tuna))	
		Tuna/Cheese	)	)	68
		Tuna/Chicken))	
		Tuna/Egg))	
		Tuna/Liver))	
))	
		Liver	)	8,956,862)
		Liver/Bacon))	
		Liver/Egg	)	)	12
		Liver/Chicken))	
))	
	Beef))		
	Beef/Egg/Scrambled	)	)	7	
))		
	Not Shown	)	)	13	
		Moist:	Beef))
		Beef/Flavor	)	)	36
))	
		Liver))	
		Liver/Flavor	)	)	26
))	
		Chicken))	
		Chicken/Flavor	)	)	19
))	
		Tuna	)	)	1
))	
		Not Shown	)	)	18

TABLE 2 (Continued)

IMPORTS OF DOG AND CAT FEED - BY COMMODITY AND COMPOSITION
OCTOBER 1982 TO SEPTEMBER 1983

<u>Commodity Description</u>		<u>Composition</u>	<u>Value</u> (\$)	<u>% of</u> <u>Value</u>					
<u>Cat Food</u> (Continued)	Dry:	Liver)	3,330,577)					
		Liver/Chicken)			36				
		Liver/Flavor)							
		Fish)							
		Fish/Chicken)				25			
		Mackerel)							
		Tuna/Egg)							
		Beef/Cheese)							
		Beef/Egg/Milk/Flavor)				18			
		Beef/Flavor)							
		Meat/Milk/Fish/Flavor)					6		
		Chicken/Flavor)				(1)			
		Not Shown)				14			
Not Shown	Not Shown	6,160	100						
<u>Dog Food</u>	Canned:	Beef)	278,854)					
		Beef/Vegies)			38				
		Rabbit)				23			
		Lamb)					13		
		Chicken)						7	
		Not Shown)							19
		Moist								Beef	153,414	100
Dry:	Not Shown	7,483,074	100						

TABLE 2 (Continued)

IMPORTS OF DOG AND CAT FEED - BY COMMODITY AND COMPOSITION

OCTOBER 1982 TO SEPTEMBER 1983

<u>Commodity Description</u>	<u>Composition</u>	<u>Value</u> <u>(\$)</u>	<u>% of</u> <u>Value</u>	
<u>Dog Food</u> (Continued)	Biscuits:			
		Beef )	) 12
		Beef/Liver)		
		Cheese)	4	
		Chicken)	4	
		Charcoal)	2	
		Liver)	2	
		Not Shown)	76	
		Not Shown:		
		Liver/Flavor)	244,727	17
	Not Shown)		83	
<u>Specialty</u> <u>Products</u>	Canned & Dry			
	Not Shown	1,469,195	100	

SECTION IV

SAMPLING AND ESTIMATES

The documents examined were selected as follows. The shipments were divided into three groups (strata):

Stratum (A): \$20,000 Shipments and over
Stratum (B): \$13,000 to \$19,999 Shipments
Stratum (C): \$ 0 to \$12,999 Shipments

All shipments in Stratum A were examined. In Stratum B one shipment in four was examined, and in Stratum C one shipment in ten. Results in this report were based on the examined documents those of Stratum B and C being multiplied by 4 and 10 respectively.

ACCURACY OF RESULTS

Since some of the shipments were selected using random sampling, figures in the tables do not correspond exactly to the results which would have been obtained if all shipments had been examined. The probable range of error depends on such factors as the number of shipments examined, their similarity or otherwise, etc.

The following summary shows the probable range of error for various values shown in the tables in Section III.

<u>Value in Table</u>	<u>Typical Relative Standard Deviation</u>
\$23 million	2.1%
\$13 million	1.7%
\$ 9 million	2% to 5%
\$3 to \$7 million	5% to 7%
\$1 to \$2 million	15% to 20%
\$300,000 to \$1 million	12% to 27%
Under \$300,000	Over 30%

In most cases (approximately two thirds or more), the true result will be within plus or minus one relative standard deviation of the values shown in the tables. In rare cases (less than one in twenty) the true value will be more than two relative standard deviations from the table value.

SECTION V

FOREIGN EXPORTERS TO CANADA

Major exporters to Canada of dog and cat feed as shown in Section III of this report are listed below in descending order of value of \$300,000 or over. These values accounted for 90 per cent of the total analyzed value of \$23,329,508.

<u>NAME</u>	<u>ADDRESS</u>		<u>Value</u> <u>(\$,000)</u>
Starkist Foods Inc.	Terminal Island, CA	USA)	
Jerkey Treats Inc.	El Paso, TX	USA)	14,416*
Tuffy (Div.of Starkist Foods Inc.)	Penham, MI	USA)	
Hill's Pet Products Inc.	Topeka, KA	USA)	4,085*
Wayne Pet Food (Div.Continental Grain Co.)	Peoria, IL	USA)	
King Neptune Sales Corp.	New York, NY	USA)	
Con Agra Pet Products Co.	Rolla, MO	USA)	1,104*
Triumph Pet Industries Inc.	Hillburn, NY	USA	451
Hubbard Milling Co.	Markato, MN	USA)	
King Neptune Sales Corp.	San Juan, Puerto Rico	)	944*
Ross Wells (Div.of Beatrice Foods)	Berlin, MD	USA)	
			<hr/> 21,000

SECTION VI

CANADIAN AND FOREIGN TARIFFS

CANADA

Dog and cat feed included in this analysis were dutiable under the following most commonly applied tariff item.

<u>Tariff Item</u>	<u>Description</u>	<u>British Preferential Tariff</u>	<u>Most Favoured Nation Tariff</u>	<u>General Tariff</u>	<u>General Preferential Tariff</u>	<u>U.K. & Ireland</u>
71110-1	Prepared foods, whether canned or not, for cats and dogs. 1982 & 1983	6%	6%	25% *	4%	6%

NOTE: *Pending passage by Parliament of the Notice of Ways and Means Motion tabled on November 12, 1981, entries entitled to the General Preferential Tariff will be accepted "Subject to Amendment".

Tariff items and rates of duty are subject to change, and need to be verified by direct reference to:

Department of National Revenue
Tariff Program, Legislation and
Implementation Group
Customs and Excise
Ottawa, Ontario
K1A 0L5

FOREIGN COUNTRIES

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

International Bureaux
Department of External Affairs Canada
Ottawa, Ontario
K1A 0G2

