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IMPORT ANALYSIS

A.C. MOTORS

20 H.P. to 200 H.P.

JANUARY TO DECEMBER 1983



Government
of Canada

Regional Industrial
Expansion

Gouvernement
du Canada

Expansion industrielle
régionale

Canada

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- REFERENCES: (1) Customs Tariff: Item 44516-1
- (2) Canadian International Trade
 Classification (Cat. #65-502E,
 Statistics Canada)
- (3) Imports by Commodities
 (Cat. #65-007, Statistics Canada)
 Commodity Code 503-67-50

SECTION I

SCOPE OF ANALYSIS

This report is based on a detailed examination of National Revenue Customs invoices covering imports of A.C. motors, 20 H.P. to 200 H.P., during the period January to December 1983. Only those shipments having a value of \$4,000 and over and classified to Canadian International Trade Classification (C.I.T.C.) Import Commodity Code 503-67-50 "Motors, electric, A.C. 20 H.P. to 200 H.P., inclusive," were examined.

Published Statistics Canada values for C.I.T.C. Import Commodity Code 503-67-50 for the period analyzed amounted to \$7,932,000.

Due to the processing of only Customs invoices valued at \$4,000 and over, this analysis covers \$5,202,559 or 66 per cent of the Statistics Canada published value.

SECTION II

IMPORT TRENDS

IMPORT-COMMODITY CODE 503-67-50

A.C. MOTORS - 20 H.P. TO 200 H.P.

CALENDAR YEARS 1980 TO 1984

<u>YEAR</u>	<u>Value</u> <u>(\$,000)</u>
1980	10,219
1981	12,657
1982	10,485
1983	7,932
1984	14,519

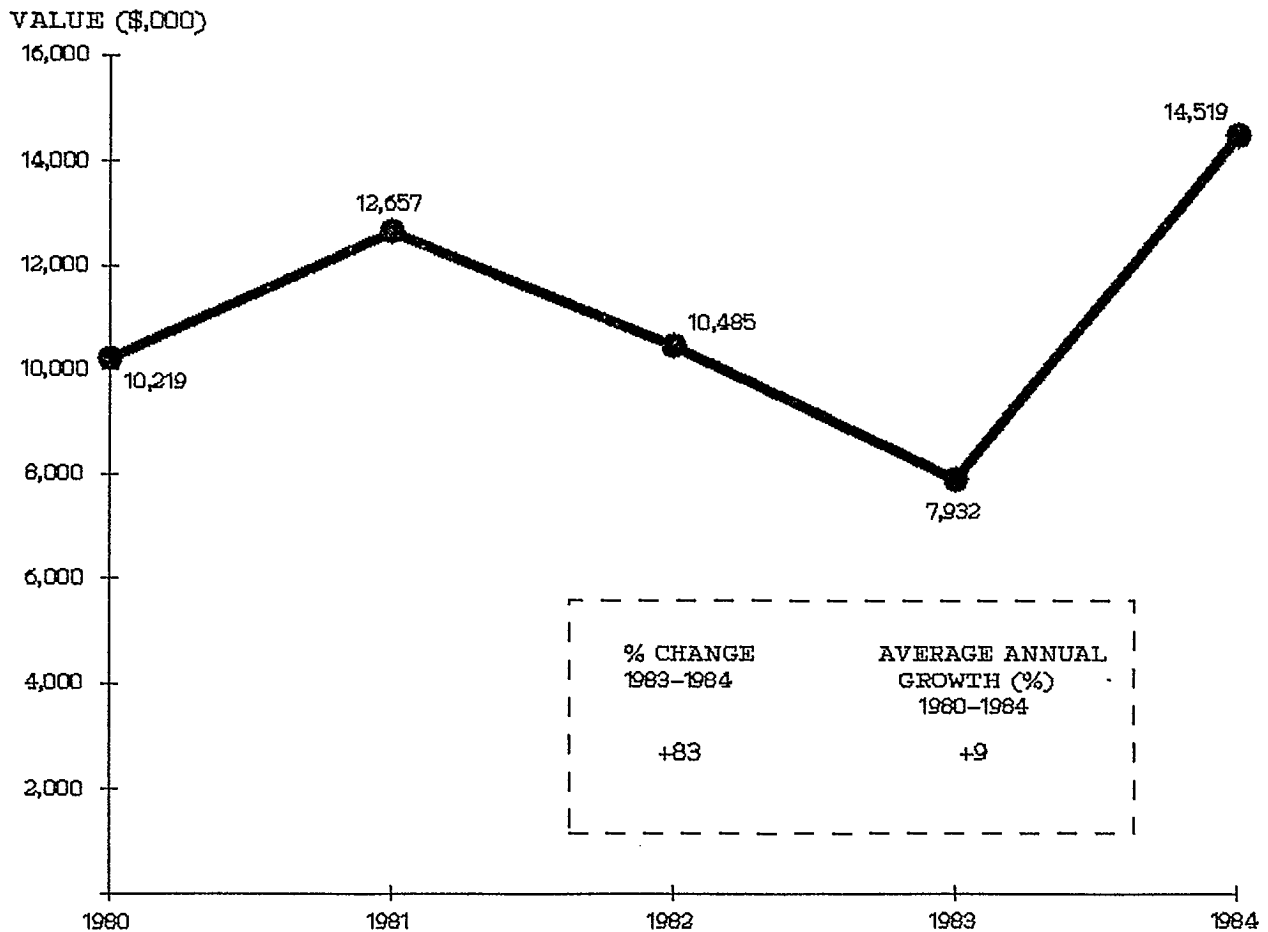
SOURCE: Statistics Canada

GRAPH I

IMPORT TRENDS

A.C. MOTORS - 20 H.P. TO 200 H.P.

CALENDAR YEARS 1980-1984



SECTION III

ANALYSIS OF IMPORTS

A.C. motors of 20 H.P. accounted for 24 per cent of the total quantity. These were followed by 25 H.P. and 40 H.P. with 17 per cent and 16 per cent, respectively. Forty-seven per cent of the total quantity of A.C. motors as indicated in this analysis entered Canada at provinces east of Ontario (see Tables 1 and 1A).

Confidentiality restrictions necessitated grouping of individual countries of origin. Imports from United Kingdom, France, West Germany and Poland accounted for 53 per cent of the total quantity. Japan and Taiwan together accounted for 20 per cent followed closely by the United States with 19 per cent. (See Tables 2 and 2A).

Although not noted in Tables 2 and 2A, the major country of origin by value was the United States accounting for 1,245 motors with a value of \$1,826,840. This was followed by the United Kingdom with 2,863 motors for a value of \$1,464,964. Japan was next with 1,017 motors and a value of \$864,064.

Full details of the analysis are provided in Tables 1, 1A, 2 and 2A.

NOTES: 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.

TABLE 1 - SUMMARY

IMPORTS OF A.C. MOTORS - 20 H.P. to 200 H.P.

BY H.P., QUANTITY AND VALUE

JANUARY TO DECEMBER 1983

<u>Horsepower</u>	<u>Quantity</u> (No.)	<u>Value</u> (\$)
20	1,583	567,905
25	1,106	593,551
30	862	444,823
40	1,063	541,065
50	503	426,305
60	243	286,794
75	304	503,840
100	219	400,625
125	113	291,301
150	141	438,176
200	85	334,035
Not Shown	306	374,139
TOTAL	6,528	5,202,559

GRAPH II
BY H.P. CAPACITY DISTRIBUTION
JANUARY TO DECEMBER 1983

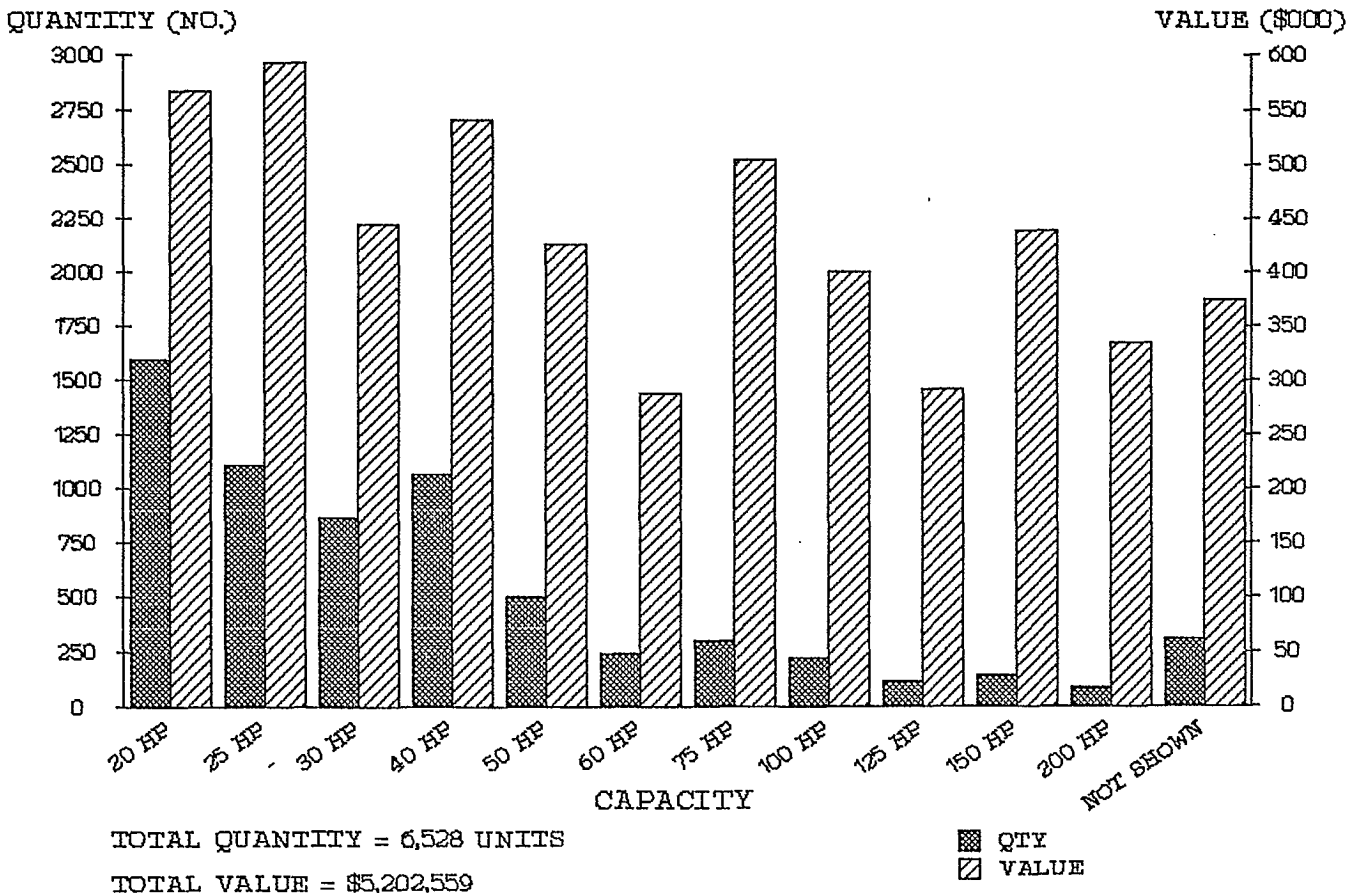


TABLE 1A

IMPORTS OF A.C. MOTORS - 20 H.P. to 200 H.P.

BY H.P. AND FRAME SIZE

JANUARY TO DECEMBER 1983

<u>Horsepower</u>	<u>Frame</u>	<u>Quantity</u> (No.)	<u>Value</u> (\$)	<u>REGION OF ENTRY</u>			<u>Import Market Concentration</u>	
				<u>West of Ontario</u>	<u>Ontario</u>	<u>East of Ontario</u>	<u>Top 3 Firms</u> (% of Quantity)	<u>Top 5 Firms</u> (% of Quantity)
20	254	164	45,609				68	85
	256	1,195	382,167				73	87
	286	179	88,769				75	91
	324	41	35,882				54	80
	Not Shown	4	15,478				100	100*
		1,583	567,905	24	33	43	71	85
25	256	142	70,480				68	87
	284	690	290,166				79	91
	324	130	82,500				72	89
	326	130	78,900				92	99
	Not Shown	14	71,505				86	100
		1,106	593,551	21	33	46	71	88
30	284	91	40,565				75	90
	286	652	255,291				82	91
	326	96	88,401				55	71
	364	) (1)						
	365)	23	60,566				65	87
	Not Shown)							
		862	444,823	23	32	45	76	85

NOTES: (1) - Aggregated to preserve confidentiality

* - Fewer than number of firms indicated

TABLE 1A

(Continued)

IMPORTS OF A.C. MOTORS - 20 H.P. to 200 H.P.BY H.P. AND FRAME SIZEJANUARY TO DECEMBER 1983

<u>Horsepower</u>	<u>Frame</u>	<u>Quantity</u> (No.)	<u>Value</u> (\$)	<u>REGION OF ENTRY</u>			<u>Import Market Concentration</u> <u>Market Share</u>		
				<u>West of Ontario</u> (% of Quantity)	<u>Ontario</u> (% of Quantity)	<u>East of Ontario</u> (% of Quantity)	<u>Top 3 Firms</u> (% of Quantity)	<u>Top 5 Firms</u> (% of Quantity)	
40	286	492	60,190				91	95	
	324	413	236,207				68	79	
	326	9	10,847				100	100*	
	364	118	158,124				56	75	
	365)							
	366	)(1)						
	404)	31	75,697				71	97
	Not Shown)								
		<u>1,063</u>	<u>541,065</u>	<u>16</u>	<u>22</u>	<u>62</u>	<u>68</u>	<u>82</u>	
50	324	44	30,032				89	100	
	326	407	299,518				58	78	
	364	)(1)						
	365)	42	55,182				57	81
	404)(1)	10	41,573				80	100*
	405)							
		<u>503</u>	<u>426,305</u>	<u>23</u>	<u>34</u>	<u>43</u>	<u>59</u>	<u>82</u>	

NOTES: (1) - Aggregated to preserve confidentiality

* - Fewer than number of firms indicated

TABLE 1A

(Continued)

IMPORTS OF A.C. MOTORS - 20 H.P. to 200 H.P.BY H.P. AND FRAME SIZEJANUARY TO DECEMBER 1983

<u>Horsepower</u>	<u>Frame</u>	<u>Quantity</u> (No.)	<u>Value</u> (\$)	<u>REGION OF ENTRY</u>			<u>Import</u> <u>Market Concentration</u>	
				<u>West of</u>	<u>Ontario</u>	<u>East of</u>	<u>Top 3</u>	<u>Top 5</u>
				<u>Ontario</u>	<u>Ontario</u>	<u>Ontario</u>	<u>Firms</u>	<u>Firms</u>
				<u>(% of Quantity)</u>			<u>(% of Quantity)</u>	
60	326	23	24,758				87	100
	364) (1)	168	141,041				60	80
	365)							
	404) (1)	52	120,995				46	60
	405)							
			243	286,794	36	23	41	49	67
75	364	23	27,257				91	100*
	365	211	255,850				49	65
	405	42	63,067				64	83
	444) (1)	28	157,666				86	96
	445)							
			304	503,840	30	34	36	46	66
100	365	22	43,198				68	86
	404	101	113,421				77	92
	405	81	182,083				48	69
	444	10	25,008				80	100
	Not shown	5	36,915				80	100*
			219	400,625	44	28	28	55	68

NOTES: (1) - Aggregated to preserve confidentiality

* - Fewer than number of firms indicated

TABLE 1A

(Continued)

IMPORTS OF A.C. MOTORS - 20 H.P. to 200 H.P.BY H.P. AND FRAME SIZEJANUARY TO DECEMBER 1983

<u>Horsepower</u>	<u>Frame</u>	<u>Quantity</u> (No.)	<u>Value</u> (\$)	<u>REGION OF ENTRY</u>			<u>Import Market Concentration</u>	
				<u>West of Ontario</u> (% of Quantity)	<u>Ontario</u> (% of Quantity)	<u>East of Ontario</u>	<u>Top 3 Firms</u> (% of Quantity)	<u>Top 5 Firms</u>
125	404	54	119,948				87	94
	405	21	43,070				52	71
	444	30	83,942				73	80
	445) (1)	8	44,341				100	100*
	504)							
		<u>113</u>	<u>291,301</u>	<u>26</u>	<u>54</u>	<u>20</u>	<u>69</u>	<u>78</u>
150	404) (1)	17	40,633				76	94
	405)							
	444	60	147,822				68	83
	445	51	167,308				45	65
	505	<u>13</u>	<u>82,413</u>				<u>77</u>	<u>100</u>
		<u>141</u>	<u>438,176</u>	<u>43</u>	<u>34</u>	<u>23</u>	<u>45</u>	<u>61</u>
200	444) (1)							
	445)	55	181,484				65	80
	447)							
	504) (1)	30	152,551				60	73
	505)							
		<u>85</u>	<u>334,035</u>	<u>40</u>	<u>30</u>	<u>30</u>	<u>55</u>	<u>69</u>
Not Shown	Not Shown	306	374,139	5	15	80	84	93
GRAND TOTAL		<u>6,528</u>	<u>5,202,559</u>	<u>23</u>	<u>30</u>	<u>47</u>	<u>60</u>	<u>79</u>

NOTE: (1) - Aggregated to preserve confidentiality

* - Fewer than number of firms indicated

TABLE 2 - SUMMARY
IMPORTS OF A.C. MOTORS 20 H.P. TO 200 H.P.
BY COUNTRY OF ORIGIN
JANUARY TO DECEMBER 1983

(1) <u>Country of Origin</u>	<u>Quantity</u> (No.)	<u>Value</u> (\$)
A) United Kingdom, France, West Germany & Poland	3,460	2,013,941
B) Japan & Taiwan	1,292	1,046,654
C) Brazil & Mexico	531	315,124
D) United States	<u>1,245</u>	<u>1,826,840</u>
	6,528	5,202,559

NOTE: (1) - Aggregated to preserve confidentiality.

GRAPH III

A.C. MOTORS - 20 H.P. TO 200 H.P.
 BY COUNTRY OF ORIGIN
 JANUARY TO DECEMBER 1983

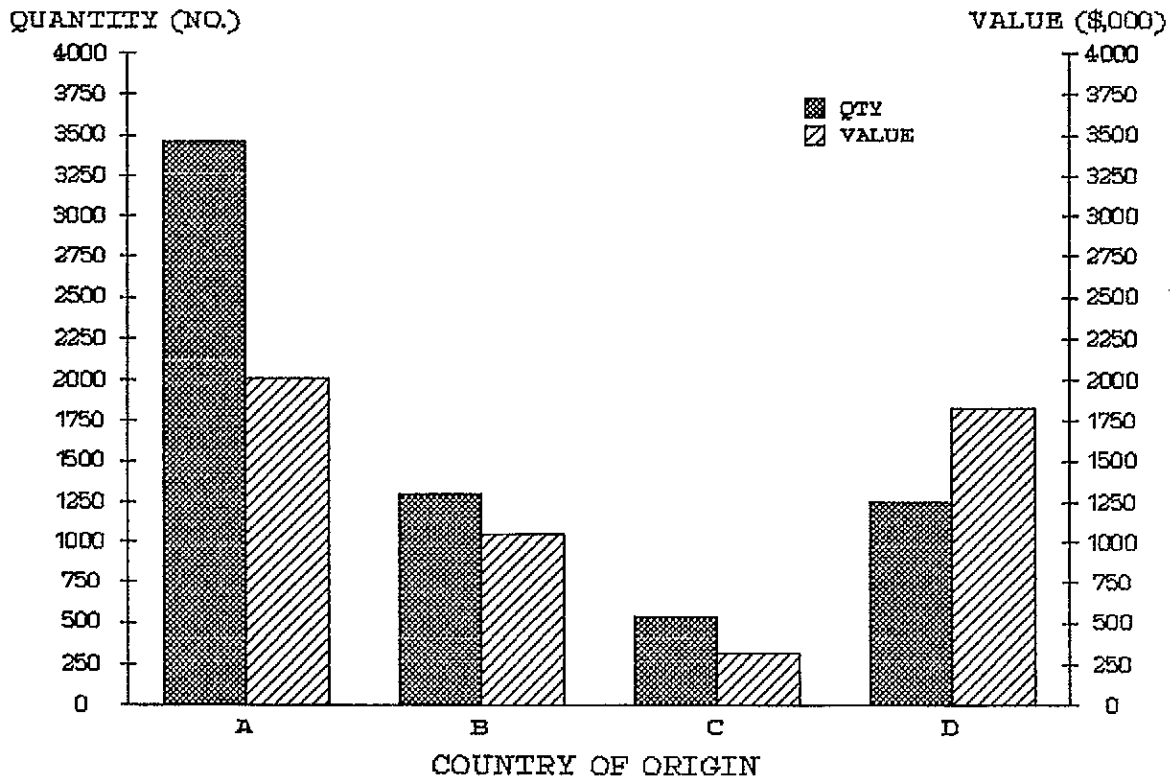


TABLE 2A

IMPORTS OF A.C. MOTORS - 20 H.P. TO 200 H.P.

BY H.P. AND COUNTRY OF ORIGIN

JANUARY TO DECEMBER 1983

<u>Horsepower</u> (1)	<u>Country of Origin</u> (1)	<u>Quantity</u> (No.)	<u>Value</u> (\$)
20 & 25	United Kingdom, France, West Germany and Poland	1,695	666,998
	Japan and Taiwan	565	202,869
	Brazil and Mexico	270	88,074
	United States	<u>159</u>	<u>203,515</u>
		2,689	1,161,456
30 & 40	United Kingdom, France, West Germany and Poland	857	406,850
	Japan and Taiwan	303	154,993
	Brazil and Mexico	125	66,026
	United States	<u>640</u>	<u>358,019</u>
		1,925	985,888
50, 60 & 75	United Kingdom, France and Poland	454	366,150
	Japan and Taiwan	208	190,319
	Brazil and Mexico	88	71,846
	United States	<u>300</u>	<u>588,624</u>
		1,050	1,216,939
100 & 125	United Kingdom, France and Poland	114	172,572
	Japan and Taiwan	135	224,503
	Brazil and Mexico	21	30,883
	United States	<u>62</u>	<u>263,968</u>
		332	691,926

NOTE: (1) - Aggregated to preserve confidentiality.

TABLE 2A

(Continued)

IMPORTS OF A.C. MOTORS - 20 H.P. TO 200 H.P.

BY H.P. AND COUNTRY OF ORIGIN

JANUARY TO DECEMBER 1983

<u>Horsepower</u>	<u>Country of Origin</u>	<u>Quantity (No.)</u>	<u>Value (\$)</u>
(1) 150 & 200	United Kingdom, France and Poland	64	132,385
	Japan and Taiwan	81	273,970
	Brazil and Mexico	27	58,295
	United States	<u>54</u>	<u>307,561</u>
		226	772,211
Not Shown	United Kingdom, France and West Germany	276	268,986
	United States	<u>30</u>	<u>105,153</u>
		306	374,139
GRAND TOTAL		<u>6,528</u>	<u>5,202,559</u>

NOTE: (1) - Aggregated to preserve confidentiality.

SECTION IV

CANADIAN IMPORTERS

Importers of A.C. motors, 20 H.P. to 200 H.P., inclusive during the period January to December 1983 as indicated in Section III, are listed below in alphabetical order.

<u>NAME</u>	<u>ADDRESS</u>
Accurpress Mfg. Ltd.	Richmond, B.C.
Aggressive Pump and Supply Inc.	Langley, B.C.
Alpha De Bon Ind. C/O Chicago Blower Ltd.	Winnipeg, Man.
Beaver Electric Machinery Ltd.	Burnaby, B.C.
Belnor Eng. Ltd.	Downsview, Ont.
Beloit Canada Ltd. Goulds Pump Div.	Sorel, Que.
Berkeley Pump Ltd.	Ajax, Ont.
Brim Pumps & Systems Ltd.	Mississauga, Ont.
Brook Crompton Barkinson Ltd.	Rexdale, Ont.
Brown Boveri (Can) Inc.	Pointe-Claire, Que.
Bull Motors Ltd.	Mississauga, Ont.
C.E. Bauer Canada	Brantford, Ont.
Canadian Electro Drives (1982)	Burnaby, B.C.
Chamco Engineering Sales Ltd.	Vancouver, B.C.
Chrysler Canada Ltd.	Windsor, Ont.
CML Northern Blower Inc.	Winnipeg, Man.
Compair Can. Inc.	Oakville, Ont.
Crossman Machinery Co. Ltd.	Vancouver, B.C.
Cullaton Lake Gold Mines	Thompson, Man.
Curd Industrial Blowers	Rexdale, Ont.
Daf. Indal, Ltd.	Mississauga, Ont.
Dalimpex Ltd.	St Laurent, Que.
Dayton Walther Canada Ltd.	Guelph, Ont.
Del Star Electronic	Montreal, Que.
Del's Electric Motor Supply	Winnipeg, Man.
Delaval Turbine Canada Ltd.	Maple, Ont.
Delta Enterprises Sarnia Ltd.	Sarnia, Ont.
Dunlop Ind. Ltd.	Huron Park, Ont.
E.R.S. (Energy Resource Supply Ltd.)	Calgary, Alta.
Emerson Electric Canada Ltd.	Markham, Ont.
Ex Cell-O Corp. of Can. Ltd.	London, Ont.
F. Jos Lamb Co. Ltd.	Windsor, Ont.
Franklin Electric Co. Inc.	Strathroy, Ont.
G.E.C. Canada Ltd.	Montreal, Que.
G.M. of Canada	Mississauga, Ont.
Gaco Systems Ltd.	St Catharines, Ont.
Geer Motor & Control Ltd.	Brantford, Ont.
Gould Mfg. of Canada	Calgary, Alta.
Electric Motor Div.	Rexdale, Ont.
Goulds Pumps Canada Inc.	Cambridge, Ont.

SECTION IV

(Continued)

CANADIAN IMPORTERS

<u>NAME</u>	<u>ADDRESS</u>
Haliburton Services Ltd.	Edmonton, Alta.
Hampton Power Products Ltd.	Richmond, B.C.
Harnischfeger Corp. Canada Ltd.	Port Moody, B.C.
Husky Injection Moulding Systems	Bolton, Ont.
Hydro Dynamique Ltée.	Montreal, Que.
Industrial Equip. Co. Ltd.	Delta, B.C.
Itt Ind. of Canada Ltd.	Guelph, Ont.
Joy Manufacturing Co. Ltd.	Winnipeg, Man.
Keuffel & Esser Canada	Granby, Que.
Kiewit-Atkinson-Commonwealth-Ramsay	Napawin, Sask.
Lincoln Electric Co. Of Canada	Toronto, Ont.
Madison Ind. Equip. Ltd.	Vancouver, B.C.
Memorex (Can.) Ltd.	Markham, Ont.
Modomekan Inc.	London, Ont.
Motor Wheel Corp. Ltd.	Chatham, Ont.
Nicholls Radtke & Assoc. Ltd.	Cambridge, Ont.
Northern Elevator Ltd.	Scarborough, Ont.
Otis Elevator Company	Hamilton, Ont.
Pacific Pumping of Canada	Georgetown, Ont.
Phelan Brothers Electrical Dist.	Bolton, Ont.
Playford Tarshis	Rexdale, Ont.
Pritchard Engineering Co.	Winnipeg, Man.
Prodec Pump Equip. Ltd.	Delta, B.C.
Professional Mach. & Tool Co.	Scarborough, Ont.
Provincial Crane, Div. of Amca.	Niagara Falls, Ont.
Reliance Electric Ltd.	Quebec, Que.
	St Hubert Que.
	Stratford, Ont.
Schindler Armor Elevator Ltd.	Pickering, Ont.
Soc. Manufacturing Ltd.	Sherbrooke, Que.
Spiroll Kipp Kelly Ltd.	Winnipeg, Man.
Star Electric Ltd.	Calgary, Alta.
Sutherland-Schultz	Sterling Heights, Ont.
Toshiba Inter'l Corp.	Vancouver, B.C.
Union Pump (Canada) Ltd.	Burlington, Ont.
Universal Sales	Saint John, N.B.
Usine Moteurs Leroy Somer	Granby, Que.
V.J. Parmensky Ltd.	Don Mills, Ont.
Velan Engineering Ltd.	St Laurent, Que.
Volcano Inc.	St Hyacinthe, Que.
Waffles Electric	Windsor, Ont.
	Toronto, Ont.
Westinghouse Canada Ltd.	Hamilton, Ont.
	Boisbriand, Que.
Worthington Canada Inc.	Brantford, Ont.

SECTION V

FOREIGN EXPORTERS TO CANADA

Major exporters to Canada of A.C. motors as indicated in Section III of this report are listed below in descending order of value. These exporters accounted for 82 per cent of the total analyzed value of \$5,202,559.

<u>NAME</u>	<u>ADDRESS</u>	
Toshiba Corp.	Tokyo, Houston, TX	Japan U.S.A.
Hawker Siddeley Electric Motors Ltd.	Huddersfield	U.K.
G.E.C. Small Machines Ltd.	Pudsey	U.K.
U.S. Electrical Motors	Milford, CT	U.S.A.
Moteurs Leroy Somer		France
Reliance Electric Co.	Athens, GA Ashtabula, OH	U.S.A. U.S.A.
Electro Motores	Jgva Do Sul	Brazil
Delco Prod. Div. of G.M.C.	Dayton, OH	U.S.A.
Teco Electric & Machinery Co. Ltd.	Taipei Houston, TX	Taiwan U.S.A.
Westinghouse Electric Corp.	Buffalo, NY Detroit, MI	U.S.A. U.S.A.
Bull Motors Ltd.	Ipswich	U.K.
Otis Elevator Co.	Yonkers, NY	U.S.A.
Electro-Mechanik	Frankfurt	West Germany
Motores U.S. de Mexico S.A.	Apodaca, Nuevo Leon	Mexico

SECTION VI

MARKET SUMMARY

Imports in this category include A.C. integral three-phase motors. These motors are used mainly to drive a diverse range of processing and production machinery with application in driving fans, pumps, blowers, elevators, machine tools etc. Increasingly, induction motors are being used in variable-speed-drive applications.

Almost all Canadian production is in the category of A.c. induction motors. During the past several years, the Canadian industry has continuously lost ground to imports which now account for the majority of the Canadian motor market. Local manufacturers also import motors to supplement their range of local production. Previously, imports were largely from industrialized countries; but currently, imports from developing countries are gaining a substantial market share. The principal sources of competitive imports of integral motors in 1981-1984 were the United States, Japan and the United Kingdom.

To counter the growing level of imports, Canadian firms must look at rationalizing production, increasing outputs per line, and furthering their export markets.

SECTION VII

CANADIAN AND FOREIGN TARIFFS

CANADA

A.C. motors 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>
44516-1	Electric motors, and complete parts thereof, n.o.p.....1983	11.4%	11.4%	37.5%	7.5%	11.4%
	.....1984	11.4%	11.4%	37.5%	7.5%	11.4%
	.....1985	10.8%	10.8%	37.5%	7%	10.8%

The two principal countries of origin, and their tariff arrangement, included in this analysis were:

United Kingdom - Most Favoured Nation or U.K. and Ireland
United States - Most Favoured Nation

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

Tariff Programs (Tel: (613) 996-9474)
Revenue Canada
Customs and Excise
Ottawa, Ontario
K1A 0L5

FOREIGN COUNTRIES

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

Trade Information Centre (Tel: (613) 993-6435)
International Bureaux
External Affairs
Ottawa, Ontario
K1A 0G2

