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# IMPORT ANALYSIS

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A.C. MOTORS  
OVER 1 H.P. TO UNDER 20 H.P.  
FOR THE PERIOD  
JUNE 1984



Government  
of Canada

Regional Industrial  
Expansion

Gouvernement  
du Canada

Expansion industrielle  
régionale

Canada 

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A.C. MOTORS  
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Further information available from:

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C O N T E N T S

	<u>PAGE</u>
<u>SECTION I</u> - Scope of Analysis	3
<u>SECTION II</u> - Import Trends including Graph I	4
<u>SECTION III</u> - Analysis of Imports	5
TABLE 1 - Summary by H.P., Quantity and Value including Graph II	6
TABLE 1A - A.C. Motors by H.P. and Frame Size including Region of Entry and Market Concentration	7
TABLE 2 - A.C. Motors by H.P. and Country of Origin	11
TABLE 3 - A.C. Motors by H.P. and phase	14
<u>SECTION IV</u> - Canadian Importers	16
<u>SECTION V</u> - Foreign Exporters to Canada	19
<u>SECTION VI</u> - Market summary	20
<u>SECTION VII</u> - Canadian and Foreign Tariffs	21

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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 503-67-40

SECTION I

SCOPE OF ANALYSIS

This report is based on a detailed examination of Revenue Canada Customs invoices covering imports of A.C. motors, over 1 H.P. to under 20 H.P. during the month of June 1984 and classified to Canadian International Trade Classification (C.I.T.C.) Import Commodity Code 503-67-40, "Motors, electric, A.C., over 1 H.P. to under 20 H.P."

The large number of transactions under Import Commodity Code 503-67-40 for the 1984 calendar year precluded an analysis of imports for a twelve-month period. As a result, the analysis was confined to the month of June 1984 but covers all transactions from all countries of export.

SECTION II

IMPORT TRENDS

IMPORT COMMODITY CODE 503-67-40

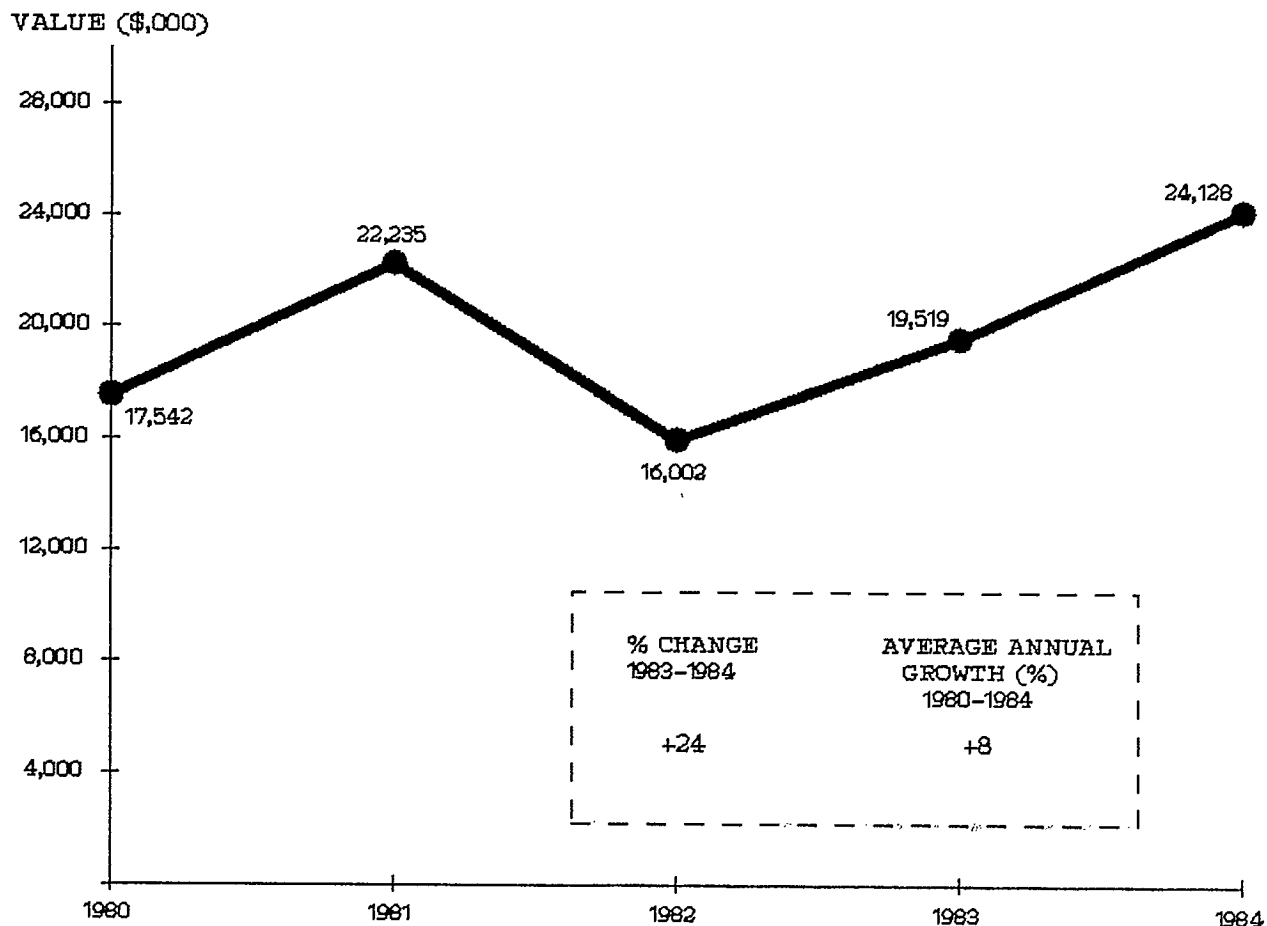
A.C. MOTORS - OVER 1 H.P. AND UNDER 20 H.P.

CALENDAR YEARS 1980 TO 1984

<u>YEAR</u>	<u>Value</u> <u>(\$ ,000)</u>
1980	17,542
1981	22,235
1982	16,002
1983	19,519
1984	24,128

GRAPH I

IMPORT TRENDS: VALUES  
A.C. MOTORS - OVER 1 H.P. AND UNDER 20 H.P.  
CALENDAR YEARS 1980 TO 1984



SECTION III

ANALYSIS OF IMPORTS

Total imports of A.C. motors over 1 H.P. to under 20 H.P. during the month of June 1984 amounted to 14,150 motors for a value of \$1,922,559. A.C. motors of 1.5 H.P. accounted for 2,653 units for a value of \$229,851, or 19 per cent and 12 per cent, respectively, of the total quantity and value. These were followed by 2 H.P. accounting for 2,561 motors (18 per cent) for a value of \$318,667 (17 per cent) and 5 H.P. with 2,427 units (17 per cent) for a value of \$469,075 (24 per cent). Table 1 refers.

Seven thousand, one hundred and eighty-eight (7,188) motors, or 51 per cent of the total quantity, entered Canada through ports in the province of Ontario (see Table 1A).

Totals by most individual countries of origin are not shown in this analysis due to confidentiality restrictions. The United States was the major country of origin accounting for 9,346 motors for a value of \$1,318,207, or 66 per cent and 69 per cent of the total quantity and value, respectively (see Table 2).

Multi-phase, A.C. motors, as shown in Table 3 of this report, amounted to 6,547 units (46 per cent) for a value of \$872,883 (45 per cent).

A number of shipments totaling 2,662 units valued at \$187,611 could not be identified according to H.P., frame size, or phase due to inadequate information.

Full details of the analysis are provided in Tables 1, 1A, 2 and 3.

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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

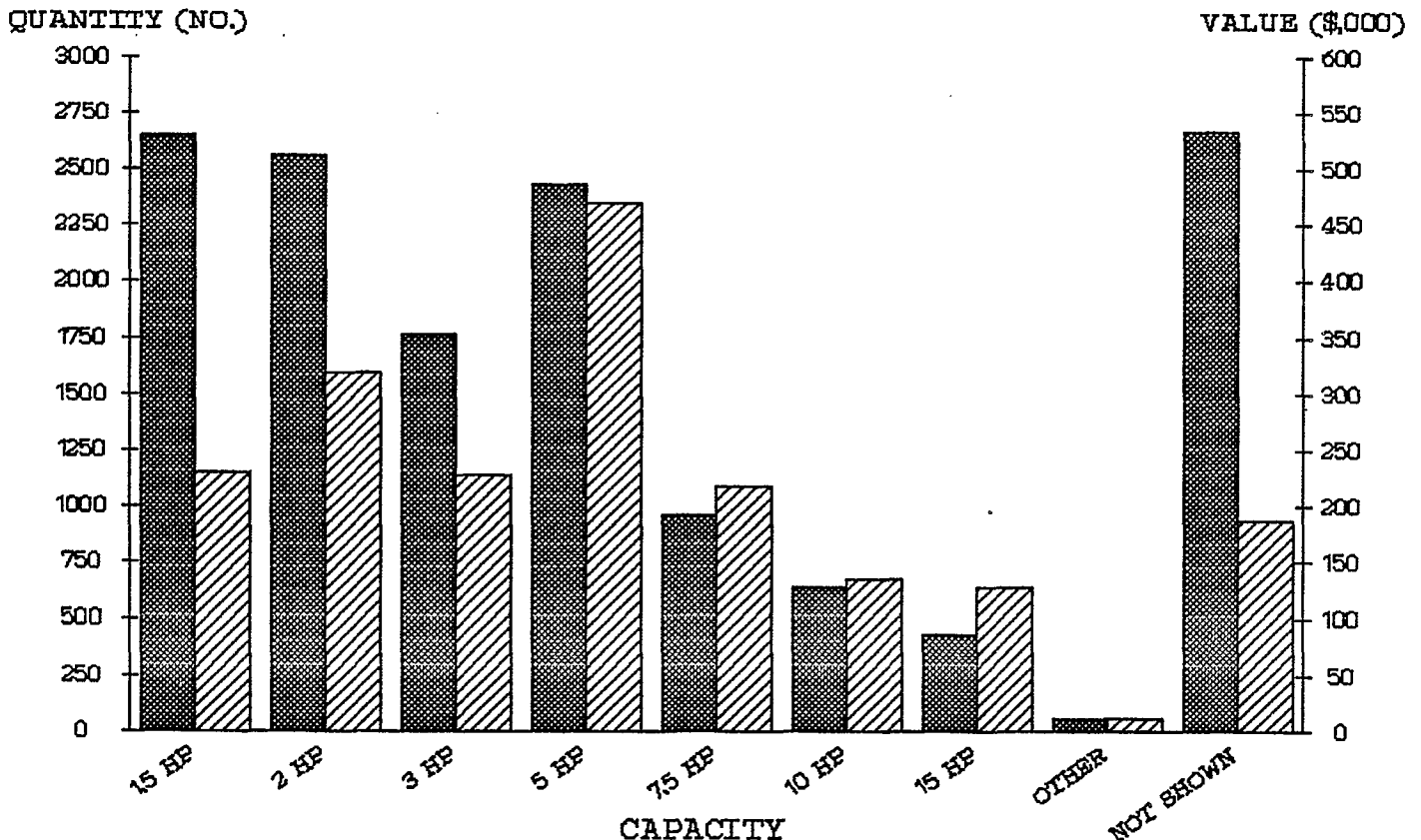
IMPORTS OF A.C. MOTORS - OVER 1 H.P. TO UNDER 20 H.P.

BY H.P., QUANTITY AND VALUE

JUNE 1984

<u>Horsepower</u>	<u>Quantity</u> (No.)	<u>Value</u> (\$)
1-1/2	2,653	229,851
2	2,561	318,667
3	1,767	227,171
5	2,427	469,075
7-1/2	958	217,193
10	636	133,914
15	431	127,572
Other: 2-1/4, 2-1/2, 4 4-1/2, 5-1/2, 6	55	11,505
Not Shown	<u>2,662</u>	<u>187,611</u>
TOTAL	14,150	1,922,559

GRAPH II  
BY H.P. CAPACITY DISTRIBUTION  
JUNE 1984



TOTAL QUANTITY = 14,150 UNITS

TOTAL VALUE = \$1,922,559

■ QTY  
▨ VALUE



TABLE 1A

IMPORTS OF A.C. MOTORS - OVER 1 H.P. TO UNDER 20 H.P.BY H.P. AND FRAME SIZE

JUNE 1984

<u>Horsepower</u>	<u>Frame Size</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)
1 1/2	56	1,177	112,428				55	74
	143	34	2,174				79	100
	145	1,235	73,221				56	62
	182	127	21,436				52	72
	184	49	15,330				92	96
	Not Shown	31	5,262				100	100*
		2,653	229,851	10	67	23	40	53
2	56	438	43,165				89	95
	143	8	946				100	100*
	145	1,077	96,861				52	66
	182	173	31,208				62	79
	184	801	94,411				84	91
	213 ) (1)							
	215 )	32	44,363				94	100
	Not Shown	32	7,763				94	100*
		2,561	318,717	8	80	12	50	61

NOTES: (1) - Aggregated to preserve confidentiality

\* - Fewer than number of firms indicated

TABLE 1A

(Continued)

IMPORTS OF A.C. MOTORS - OVER 1 H.P. TO UNDER 20 H.P.BY H.P. AND FRAME SIZEJUNE 1984

<u>Horsepower</u>	<u>Frame Size</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>	<u>Top 3 Firms</u> (% of Quantity)	<u>Top 5 Firms</u>
3	56	104	11,108				100	100*
	145	257	16,743				75	90
	182	793	79,844				51	67
	184	440	77,548				63	79
	213	149	32,229				59	76
	215	14	3,816				100	100*
	Not Shown	10	5,883				100	100*
		1,767	227,171	23	41	36	32	46
5	182	322	35,609				93	98
	184	1,765	295,162				44	63
	213	88	17,946				90	94
	215	187	42,829				50	65
	254	51	69,676				96	100*
	Not Shown	14	7,853				79	93
		2,427	469,075	19	44	37	40	60

NOTE: \* - Fewer than number of firms indicated

TABLE 1A

(Continued)

IMPORTS OF A.C. MOTORS - OVER 1 H.P. TO UNDER 20 H.P.BY H.P. AND FRAME SIZEJUNE 1984

<u>Horsepower</u>	<u>Frame Size</u>	<u>Quantity</u> (No.)	<u>Value</u> (\$)	<u>REGION OF ENTRY</u>			<u>IMPORT</u> <u>Market Concentration</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)
7 1/2	184	84	14,351				74	95
	213	460	73,464				63	79
	215	201	60,994				82	90
	254	71	20,366				54	82
	256	132	43,805				98	100
	Not Shown	<u>10</u>	<u>4,213</u>				<u>90</u>	<u>100*</u>
		958	217,193	12	40	48	54	66
10	213	32	5,630				100	100*
	215	508	92,253				51	73
	256	93	33,812				59	74
	284	<u>3</u>	<u>2,219</u>				<u>100</u>	<u>100*</u>
		636	133,914	23	41	36	43	66
15	215	27	7,212				89	96
	254	361	93,178				47	68
	284 ) (1)							
	286 )	39	23,126				69	85
	Not Shown	<u>4</u>	<u>4,056</u>				<u>100</u>	<u>100*</u>
		431	127,572	22	36	42	41	59

NOTES: (1) - Aggregated to preserve confidentiality

\* - Fewer than number of firms indicated

TABLE 1A

(Continued)

IMPORTS OF A.C. MOTORS - OVER 1 H.P. TO UNDER 20 H.P.BY H.P. AND FRAME SIZEJUNE 1984

<u>Horsepower</u>	<u>Frame Size</u>	<u>Quantity</u> (No.)	<u>Value</u> (\$)	<u>REGION OF ENTRY</u>			<u>IMPORT</u> <u>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>
<u>Other:</u> 2-1/4, 2-1/2, 4, 4-1/2, 5-1/2, & 6	Not Shown	55	11,505	31	16	53	85	96
Not Shown	Not Shown	2,662	187,611	2	24	74	93	96
<b>GRAND TOTAL</b>		<b>14,150</b>	<b>1,922,559</b>	<b>12</b>	<b>50</b>	<b>38</b>	<b>30</b>	<b>44</b>

TABLE 2

IMPORTS OF A.C. MOTORS - OVER 1 H.P. TO UNDER 20 H.P.

BY H.P. AND COUNTRY OF ORIGIN

JUNE 1984

<u>Horsepower</u>	<u>Country of Origin</u>	<u>Quantity (No.)</u>	<u>Value (\$)</u>
1-1/2	United Kingdom	)(1)	
	Japan	)	427
	Taiwan	)	
	Brazil	)(1)	
	Mexico	)	255
	United States		<u>1,971</u>
		2,653	229,851
2	United Kingdom	)(1)	
	Japan	)	538
	Taiwan	)	
	Brazil	)(1)	
	Mexico	)	280
	United States		<u>1,743</u>
		2,561	318,667
3	United Kingdom	)(1)	
	Japan	)	417
	Taiwan	)	
	Brazil	)(1)	
	Mexico	)	254
	United States		<u>1,096</u>
		1,767	227,171

NOTE: (1) - Aggregated to preserve confidentiality

TABLE 2

(Continued)

IMPORTS OF A.C. MOTORS - OVER 1 H.P. TO UNDER 20 H.P.

BY H.P. AND COUNTRY OF ORIGIN

JUNE 1984

<u>Horsepower</u>	<u>Country of Origin</u>	<u>Quantity</u> (No.)	<u>Value</u> (\$)
5	United Kingdom )	671	69,325
	Japan )		
	Taiwan )		
	Brazil )	388	46,483
	Mexico )		
	United States	<u>1,368</u>	<u>353,267</u>
		2,427	469,075
7-1/2	United Kingdom )	311	46,671
	France )		
	Japan, Taiwan )		
	Brazil )	410	94,114
	Mexico )		
	United States	<u>237</u>	<u>76,408</u>
		958	217,193
10	United Kingdom )	312	53,752
	France, Poland )		
	Japan, Taiwan )		
	Brazil )	183	32,329
	Mexico )		
	United States	<u>141</u>	<u>47,833</u>
		636	133,914
15	United Kingdom )	165	40,433
	France, )		
	West Germany, )		
	Poland )		

NOTE: (1) - Aggregated to preserve confidentiality

TABLE 2

(Continued)

IMPORTS OF A.C. MOTORS - OVER 1 H.P. TO UNDER 20 H.P.

BY H.P. AND COUNTRY OF ORIGIN

JUNE 1984

<u>Horsepower</u>	<u>Country of Origin</u>	<u>Quantity (No.)</u>	<u>Value (\$)</u>
15	Japan ) (1)	69	17,302
	Taiwan )		
	Brazil ) (1)	118	
Mexico )			
	United States	<u>79</u>	<u>37,794</u>
<u>Other:</u>		431	127,572
2-1/4, 2-1/2, 4 4-1/2, 5-1/2 & 6	Mexico & United States	55	11,505
Not Shown	France ) (1)	2,662	187,611
	Japan )		
	United States )		
GRAND TOTAL		<u>14,150</u>	<u>1,922,559</u>

NOTE: (1) - Aggregated to preserve confidentiality

TABLE 3

IMPORTS OF A.C. MOTORS - OVER 1 H.P. TO UNDER 20 H.P.

BY H.P. AND PHASE

JUNE 1984

<u>Horsepower</u>	<u>Phase</u>	<u>Quantity (No.)</u>	<u>Value (\$)</u>
1-1/2	1	1,284	94,408
	3	1,195	107,119
	Not Shown	<u>174</u>	<u>28,324</u>
		2,653	229,851
2	1	571	91,913
	3	1,848	206,015
	Not Shown	<u>142</u>	<u>20,739</u>
		2,561	318,667
3	1	554	74,228
	3	944	112,790
	Not Shown	<u>269</u>	<u>40,153</u>
		1,767	227,171
5	1	919	204,887
	3	1,219	148,951
	Not Shown	<u>289</u>	<u>115,237</u>
		2,427	469,075
7-1/2	1	184	52,847
	3	591	123,678
	Not Shown	<u>183</u>	<u>40,668</u>
		958	217,193
10	1	28	9,703
	3	425	83,533
	Not Shown	<u>183</u>	<u>40,678</u>
		636	133,914
15	3	320	86,776
	Not Shown	<u>111</u>	<u>40,796</u>
		431	127,572



TABLE 3

(Continued)

IMPORTS OF A.C. MOTORS - OVER 1 H.P. TO UNDER 20 H.P.

BY H.P. AND PHASE

JUNE 1984

<u>Horsepower</u>	<u>Phase</u>	<u>Quantity</u> (No.)	<u>Value</u> (\$)
<u>Other:</u>			
2-1/4, 2-1/2, 4 4-1/2, 5-1/2 & 6	Not Shown	55	11,505
Not Shown	Not Shown	2,662	187,611
		<hr/>	<hr/>
GRAND TOTAL		14,150	1,922,559

SECTION IV

CANADIAN IMPORTERS

Importers of A.C. motors, over 1 H.P. to under 20 H.P., during June 1984 as indicated in Section III, are listed below in alphabetical order.

<u>NAME</u>	<u>ADDRESS</u>
Alfa-Laval Ltd.	Peterborough, Ont.
Alfred Schnurr Electric Co. Ltd.	Guelph, Ont.
Babson Bros. Co. Ltd.	Mississauga, Ont.
Bearings & Transmission Ltd.	Lloydminster, Alta
Beaver Delta Machy Corp.	Guelph, Ont.
Bijur Canada Ltd.	Guelph, Ont.
Blue Giant Equip. of Canada Ltd.	Brampton, Ont.
Brook Crompton Barkinson Ltd.	Rexdale, Ont.
Burnside Equip. Ltd.	Downsview, Ont.
Canadian Electro Drives (1982)	Burnaby, B.C.
Canadian General Electric Co.	Peterborough, Ont.
Canadian Overhead Handling Ltd.	Boisbriand, Qué.
Carrier (Canada) Ltd.	Calgary, Alberta
	Bramalea, Ont.
Century Electric Of Canada Ltd.	Rexdale, Ont.
City Machinery Limited	Winnipeg, Man.
Clarke-Gravelly Canada Ltd.	Rexdale, Ont.
Cleaver Brooks (Canada) Ltd.	Stratford, Ont.
CML Northern Blower Inc.	Winnipeg, Man.
Continental Canada Inc.	Weston, Ont.
Crossman Machinery Co. Ltd.	Vancouver, B.C.
Custom Steamex	Saskatoon, Sask.
Dalimpex Ltd.	St-Laurent, Qué.
De Vilbiss Canada Ltd.	Barrie, Ont.
Delta Enterprises	Sarnia, Ont.
Dismobec Limitée	Ville d'Anjou, Qué.
Dominion Alum. Fabricating	Mississauga, Ont.
Dresser Canada Ltd.	Cambridge, Ont.
Duriron Canada Inc.	Toronto, Ont.
Economics Laboratory Canada	Toronto, Ont.
Emerson Electric Canada Ltd.	Markham, Ont.
Ex-Cell-O Corp. of Canada Ltd.	London, Ont.
F. Jos Lamb Co. Ltd.	Windsor, Ont.
Forano Inc.	Plessisville, Qué.
Franklin Electric Co. Inc.	Strathroy, Ont.
Friesen Industries Ltd.	Abbotsford, B.C.

SECTION IV

(Continued)

CANADIAN IMPORTERS

<u>NAME</u>	<u>ADDRESS</u>
G.E.C. Canada Ltd.	Montréal, Qué.
G.E.T. Industries	Mississauga, Ont.
G.H. Wood and Co. Ltd.	Brampton, Ont.
G.M. Of Canada	Toronto, Ont.
Gorman Pulp (Canada) Ltd.	St. Catharines, Ont.
Gould Pumps Canada Inc.	St. Thomas, Ont.
Grant Electric (Ottawa) Ltd.	Cambridge, Ont.
Great Lakes Harvester Systems	Ottawa, Ont.
Greey Lightnin	Woodstock, Ont.
Grimme Harvest Star	Toronto, Ont.
Harnischfeger Corp. Canada Ltd.	Everett, Ont.
Hero Mfg.	Fort Moody, B.C.
Inter City Papers Ltd. Plastic Pkg. Div.	Burnaby, B.C.
ITT Ind. of Canada Ltd.	Mississauga, Ont.
J. Houle & Fils	Guelph, Ont.
Jordan Electric Motor Service	Drummondville, Qué.
Leeson Electric (Canada) Ltd.	Lindsay, Ont.
Les Distributions MEP Inc.	Mississauga, Ont.
Les Industries I-T-E Inc. Cetech	Pointe Claire, Qué.
Les Industries Trovac Ltée.(Cyclo-Vac)	Pointe Claire, Qué.
Madison Ind. Equipment Ltd.	Chomedy-Laval, Qué.
Managro Harvester	Vancouver, B.C.
Mark Hot Inc.	Winnipeg, Man.
Mobile Power Tool Shop Inc.	Longueuil, Qué.
Mohawk Data Science Ltd.	Port Colborne, Ont.
Norfolk Tank Mfg.	Markham, Ont.
Northern Telecom Ltd.	Courtland, Ont.
Nutone Electrical Ltd.	Scarborough, Ont.
Panneaux de la Valle Inc.	Toronto, Ont.
Peacock Inc.	Sayabec, Qué.
Peerless Sales (Canada) Ltd.	Lasalle, Qué.
Phelan Brothers Electrical Dist.	Lachine, Qué.
Princess Auto & Machinery Ltd.	Bolton, Ont.
R & R Motors & Parts	Winnipeg, Man.
Reliance Electric Ltd.	Ville St-Laurent, Qué.
	Québec, Qué.
	Stratford, Ont.
Rockwell Int'l of Canada	Don Mills, Ont.

SECTION IV

(Continued)

CANADIAN IMPORTERS

NAME

ADDRESS

Scona Electric Ltd.	Edmonton, Alta
Seguin Protech Ltd.	Montréal, Qué.
Signode Canada Ltd.	Scarborough, Ont.
Simpsons-Sears Ltd.	Scarborough, Ont.
Sitzler Electric Motor Rewind	Nisku, Alta
Smith-Roles Ltd.	Saskatoon, Sask.
Soluvac Inc.	Beauce, Qué.
Storrington Ind. Ltd.	Pickering, Ont.
Surgeson Electric Ltd.	Cornwall, Ont.
Systemes Harvestores de l'Estrie	Granby, Qué.
Thames Valley Elevator	Ajax, Ont.
The Motor Center, Div. Energy Resource Supply	Calgary, Alta
Toshiba Int'l Corp.	Vancouver, B.C.
Trane Co. of Canada Ltd.	Toronto, Ont.
Trewax Co. of Canada Ltd.	Toronto, Ont.
Tri County Farm Systems Ltd.	Indian River, Ont.
Tri-Way Machine Ltd.	Windsor, Ont.
Trisar Ltd.	Sarnia, Ont.
Union Pump (Canada) Ltd.	Burlington, Ont.
Usine Moteurs Leroy Somer	Granby, Qué.
V.J. Parmensky Ltd.	Don Mills, Ont.
Valiant Machine & Tool Inc.	Windsor, Ont.
Waffles Electric Ltd.	Windsor, Ont.
Westinghouse Canada Ltd.	Toronto, Ont.
	Hamilton, Ont.
	Boisbriand, Qué.
York Shipley of Canada Ltd.	Cambridge, Ont.

SECTION V

FOREIGN EXPORTERS TO CANADA

Major exporters to Canada of products shown in Section III of this report, who have exported \$30,000 and over, are listed below in descending order of value. These exporters accounted for 82 per cent of the total analyzed value of \$1,922,559.

<u>EXPORTER</u>	<u>ADDRESS</u>	<u>% of Value</u>
Electromotores	JGVA DO SUL, Brazil	11
Doerr Electric Corp.	Cedarburg, WI, USA	11
Baldor Electric	Fort Smith, AR, USA	10
Ametek Inc.	Racine, WI, USA	10
Leeson Electric Corp.	Grafton, WI, USA	)(1)
Hawker Siddeley Electric Motors Ltd.	Huddersfield, U.K.	) 18
Toshiba Corp.	Tokyo, Japan	)
	Houston, TX, USA	)
General Electric Co.	Erie, PA, USA	4
Reliance Electric Co.	Athens, GA, USA	3
G.E.C. Small Machines Ltd.	Pudsey, U.K.	)(1)
Westinghouse Electric Corp.	Buffalo, NY USA	) 8
Century Electric Inc.	St. Louis, MO, USA	)
Teco Electric & Machinery Co. Ltd.	Taipei, Taiwan	)(1)
Elektrim	Warza, Poland	)
Marathon Electric Mfg. Corp.	Wausau, WI, USA	) 7
Emerson Electric Co.	St. Louis, MO, USA	)

NOTE: (1) - Aggregated to preserve confidentiality

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. &amp; Ireland</u>
44516-1	Electric motors, and complete parts thereof, n.o.p.....1984	11.4%	11.4%	37.5%	7.5%	11.4%
	.....1985	10.8%	10.8%	37.5%	7%	10.8%

(United States falls within MFN category)

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

