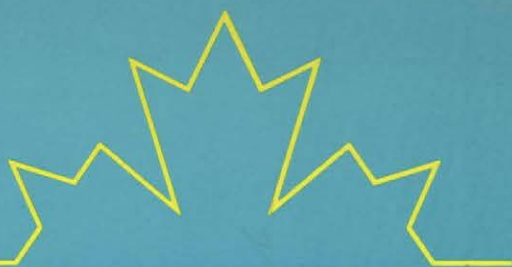


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# IMPORT ANALYSIS

## Market Research Support

JAMS AND MARMALADES

JULY TO DECEMBER 1987

Pub. No.: 88012-PM July 1988



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of Canada

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JAMS AND MARMALADES

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EXPLANATORY NOTES

Method

The data shown in this analysis is extracted from Revenue Canada Customs documents. These documents provide a description of the products, names of importers, 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 is 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.

REFERENCE SOURCES

Department of Regional Industrial Expansion  
Statistics Canada  
Revenue Canada

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IMPORT ANALYSIS

JAMS AND MARMALADES

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 those 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 of imports of jams and marmalades is based on a detailed examination of Revenue Canada Customs import documents for the period July to December 1987. Imports classified to the following Canadian International Trade Classification (C.I.T.C.) import commodity codes were analysed:

- 078-92-20 Jams, Canned, Except Infant Foods
- 078-94-10 Marmalades, Canned, Except Infant Foods

Not studied were commodity codes described as jellies or canned fruit preserves<sup>(1)</sup>. In addition, bulk shipments are contained in other import commodity codes.

II. SAMPLING TECHNIQUE

Due to the large volume of shipments classified to import commodity codes 078-92-20 and 078-94-10, it was necessary to use a sample of import invoices. Invoices are listed by lines, and the lines were selected according to the following rules:

| <u>Stratum No.</u> | <u>Value of Line for Customs<br/>Duty Purposes (\$)</u> | <u>Sampling Ratio</u> |
|--------------------|---|-----------------------|
| 1                  | 5 000 and over  | Take all              |
| 2                  | 4 000 to 4 999  | Take one in two       |
| 3                  | 2 000 to 3 999  | Take one in three     |
| 4                  | Up to 1 999   | Take one in nine      |

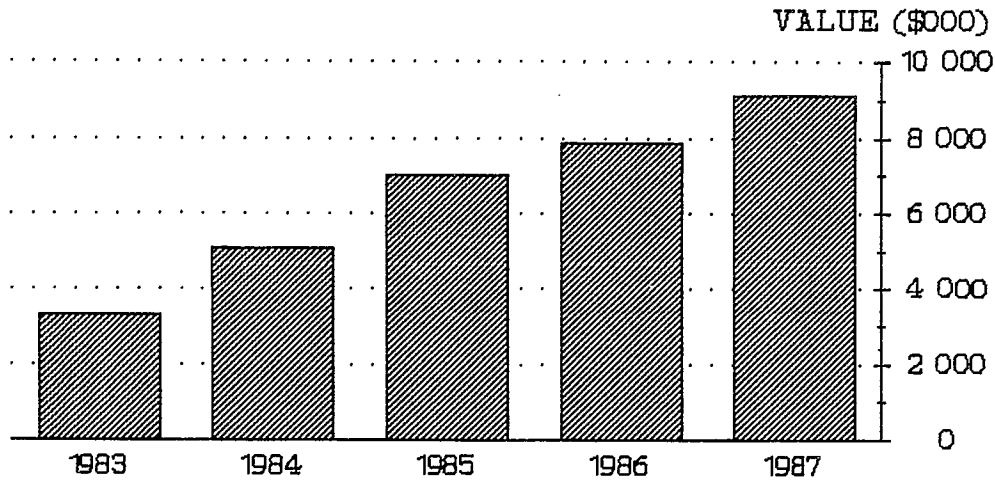
In each stratum, invoices were drawn at random according to the sampling ratio. All results in this report are based on multiplying the information in each invoice by the inverse sampling ratio (1, 2, 3, 9 respectively).

For the accuracy of the results obtained because of the sampling technique utilized in this report, refer to Appendix H.

(1) A noted exception is the United Kingdom which in some instances treated as preserves what others would consider to be jams. While not included in the main body of this analysis, the Market Information and Analysis Division examined preserves originating from the United Kingdom. The results are presented as an addendum to this report. (See page 40).

111. IMPORT TRENDS - 1983 to 1987

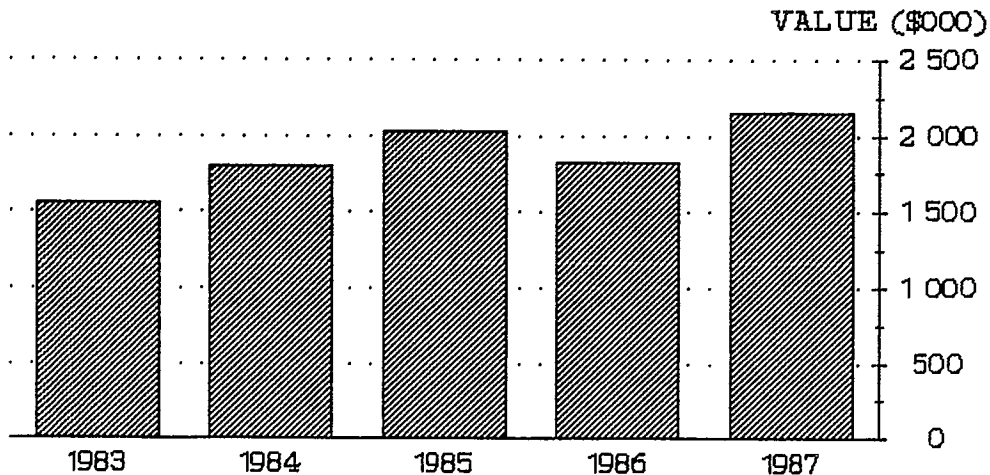
JAMS



Between 1983 and 1987 the value of jam imports increased from \$3.3 million in 1983 to \$9.1 million in 1987, an average annual growth rate of 29 per cent. The value of marmalade imports increased from \$1.6 million in 1983 to \$2.2 million in 1987 (an average annual growth rate of 8.5 per cent), despite a decrease of 11 per cent from 1985 to 1986.

|            | <u>1983</u> | <u>1984</u> | <u>1985</u> | <u>1986</u> | <u>1987</u> | <u>Average Annual Growth Rate %</u> | <u>% Change 1986-1987</u> |
|------------|-------------|-------------|-------------|-------------|-------------|-------------------------------------|---------------------------|
| Jams       | 3 295       | 5 071       | 7 005       | 7 882       | 9 132       | 29.0                                | 15.9                      |
| Marmalades | 1 557       | 1 797       | 2 031       | 1 812       | 2 157       | 8.5                                 | 19.0                      |

MARMALADES



IV. ANALYSIS OF IMPORTS - JULY TO DECEMBER 1987

Imports as shown in this report during the period July to December 1987 were valued at \$4.5 million, with jams accounting for \$3.7 million and marmalades \$820 000.

Of the total jam imports of \$3.7 million, strawberry jams accounted for \$1.1 million or 30 per cent. Raspberry jams ranked second with a value of \$767 000 or 21 per cent. Other principal flavours, in descending order of value, were apricot, cherry and black currant accounting for \$853 000 of the total value of imports. Gift packs accounted for only 3 per cent of the total. (For further details refer to Appendix A.)

Of the total marmalade imports (\$820 000), orange flavoured marmalades were valued at \$202 000 or 25 per cent of total marmalade imports. The remaining identified portion of marmalades consisted of ginger, golden shred and lime flavours. Ginger was the single major item accounting for \$177 000 or 22 per cent. Forty-four per cent of total marmalade imports were not identified as to flavour. (For further details refer to Appendix A.)

SUMMARY OF IMPORTS - BY FLAVOUR

| <u>Jams</u>                            | <u>Value</u><br><u>(\$000)</u> | <u>Total</u><br><u>% of Value</u> | <u>Marmalades</u>  | <u>Value</u><br><u>(\$000)</u> | <u>Total</u><br><u>% of Value</u> |
|--|--------------------------------|-----------------------------------|--------------------|--------------------------------|-----------------------------------|
| Strawberry (All Types)                 | 1 113                          | 30                                | Ginger             | 177                            | 22                                |
| Raspberry (All Types)                  | 767                            | 21                                | Golden Shred       | 67                             | 8                                 |
| Apricot                                | 298                            | 8                                 | Lime               | 16                             | 2                                 |
| Cherry (All Types)                     | 280                            | 8                                 | Orange             | 114                            | 14                                |
| Currant, Black                         | 275                            | 8                                 | Orange Thick Cut   | 71                             | 9                                 |
| Blackberry (All Types)                 | 170                            | 5                                 | Orange with Whisky | 7                              | 1                                 |
| Peach                                  | 73                             | 2                                 | Orange, Thick Cut  |                                |                                   |
| Orange                                 | 57                             | 2                                 | with Drambuie      | 9                              | 1                                 |
| Plum                                   | 56                             | 2                                 | Not Known          | <u>358</u>                     | <u>44</u>                         |
| Gift Packs (Flavours<br>Unknown)       | 115                            | 3                                 | GRAND TOTAL -      |                                |                                   |
| Other Flavours and<br>Flavours Unknown | <u>459</u>                     | <u>13</u>                         | MARMALADES         | 820                            | 100                               |
| GRAND TOTAL - JAMS                     | 3 663                          | 100                               |                    |                                |                                   |

Jams imported into Canada in 375 milliliter jar sizes accounted for \$699 000 or 19 per cent of the total value. The next most popular jar sizes were 750 milliliter and 250 milliliter. These were valued at \$544 000 (15 per cent) and \$440 000 (12 per cent) respectively. The dominant jar size for marmalade imports was 250 milliliters; jars of this size were valued at \$427 000 and accounted for 52 per cent of the total value of marmalade imports.

SUMMARY OF IMPORTS  
BY JAR SIZE

| <u>JAMS</u>        |                         |          | <u>MARMALADES</u>  |                         |          |
|--------------------|-------------------------|----------|--------------------|-------------------------|----------|
| <u>Grams</u>       | <u>Value</u><br>(\$000) | <u>%</u> | <u>Grams</u>       | <u>Value</u><br>(\$000) | <u>%</u> |
| 42/50              | 115                     | 3        | 15/50              | 40                      | 5        |
| 283                | 50                      | 1        | 225/258            | 28                      | 3        |
| 340                | 145                     | 4        | 340/370            | 34                      | 4        |
| 369/370            | 55                      | 2        |                    |                         |          |
| 500                | 122                     | 3        |                    |                         |          |
| Other Sizes        | <u>174</u>              | 5        | Other Sizes        | <u>16</u>               | 2        |
|                    | 661                     |          |                    | 118                     |          |
| <u>Milliliters</u> |                         |          | <u>Milliliters</u> |                         |          |
| 28                 | 186                     | 5        | 28/32              | 80                      | 10       |
| 28.4/32            | 139                     | 4        | 250                | 427                     | 52       |
| 250                | 440                     | 12       |                    |                         |          |
| 375                | 699                     | 19       |                    |                         |          |
| 750                | 544                     | 15       |                    |                         |          |
| Other Sizes        | <u>214</u>              | 6        | Other Sizes        | <u>24</u>               | 3        |
|                    | 2 222                   |          |                    | 531                     |          |
| Size Not Known     | 781                     | 21       | Size Not Known     | 170                     | 21       |
| Total All Sizes    | 3 663                   | 100      | Total All Sizes    | 820                     | 100      |

The price of a jar of jam ranged from under 10¢ to over \$2.80. (See Appendix C.) There was little relation between the size of jar and its price. For example, the overall average prices for the popular 250, 375, and 750 ml sizes were 79¢, 57¢, and 77¢ respectively. However, in all three sizes there was a very wide variety of prices. The price ranges per jar were as follows:

SUMMARY OF IMPORTS - JAMS  
JAR SIZE BY PRICE  
(\$)

|           | <u>Lowest</u> | <u>Lower</u><br><u>Quartile</u> | <u>Median</u> | <u>Upper</u><br><u>Quartile</u> | <u>Highest</u> | <u>Total</u><br><u>No. of</u><br><u>Jars</u><br><u>(000)</u> |
|-----------|---------------|---------------------------------|---------------|---------------------------------|----------------|--|
| Jar Size: |               |                                 |               |                                 |                |  |
| 250 ml    | .09           | .39                             | .70           | 1.03                            | 1.99           | 555  |
| 375 ml    | .24           | .40                             | .50           | .88                             | 1.11           | 1 200  |
| 750 ml    | .32           | .54                             | .64           | .76                             | 2.81           | 703  |

Half the 250 ml jars of jams cost under 70¢, half over. For both the 250 and 375 ml sizes, one quarter cost less than 40¢. With respect to major flavours, no real differences occurred in price ranges according to flavour. For marmalades, unit prices for 250 milliliter jars ranged from a low of 69¢ to a high of \$1.47 and averaged 81¢ per jar.



About 75 per cent of total jams and marmalades were imported at a 10 per cent tariff rate and the other 25 per cent, primarily from Yugoslavia, at 15 per cent. (See Appendix G.)

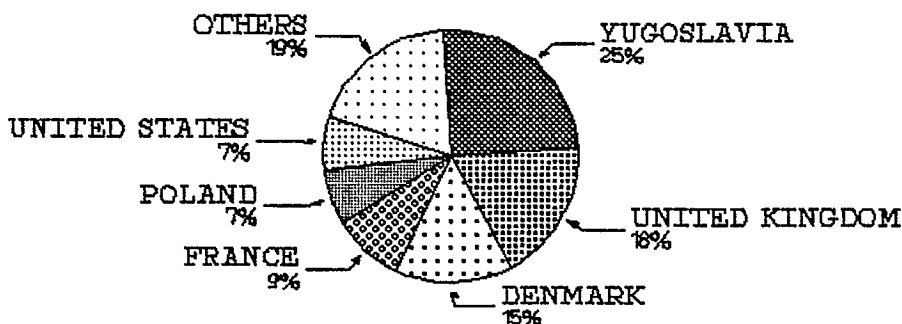
With respect to the country of origin, average prices for jams ranged from a low of 95¢ per 1000 milliliters from Yugoslavia (the major country of origin) to \$6.82. For marmalades, the average price from the dominant country, United Kingdom, was \$3.70.

Yugoslavia was the major country of origin for imports of jams accounting for \$907 000 or 25 per cent of the total value, primarily of strawberry and raspberry flavours. The United Kingdom was the next largest country of origin (\$664 000 or 18 per cent) with strawberry and black currant flavours predominating. Denmark followed closely at \$558 000 or 15 per cent, primarily raspberry. The United Kingdom was the dominant country of origin for marmalades. Shipments from that country were valued at \$661 000 or 81 per cent of the total. (For further details refer to Appendix B.)

SUMMARY OF IMPORTS  
BY COUNTRY OF ORIGIN

| <u>Country</u>            | <u>Value</u><br><u>(\$'000)</u> | <u>Average Unit Price</u><br><u>(\$/000 ml)</u> |
|---------------------------|---------------------------------|---|
| <u>JAMS</u>               |                                 |   |
| Yugoslavia                | 907                             | .95   |
| United Kingdom            | 664                             | 6.40  |
| Denmark                   | 558                             | 2.05  |
| France                    | 333                             | 4.27  |
| Poland                    | 248                             | 1.07  |
| United States             | 245                             | 6.82  |
| Others                    | <u>708</u>                      | <u>2.16</u>                                     |
| <b>TOTAL - JAMS</b>       | <b>3 663</b>                    | <b>1.85</b>                                     |
| <u>MARMALADES</u>         |                                 |   |
| United Kingdom            | 661                             | 3.70  |
| Others                    | <u>159</u>                      | <u>1.08</u>                                     |
| <b>TOTAL - MARMALADES</b> | <b>820</b>                      | <b>3.07</b>                                     |

COUNTRY OF ORIGIN - JAMS



100% = \$3.7 MILLION

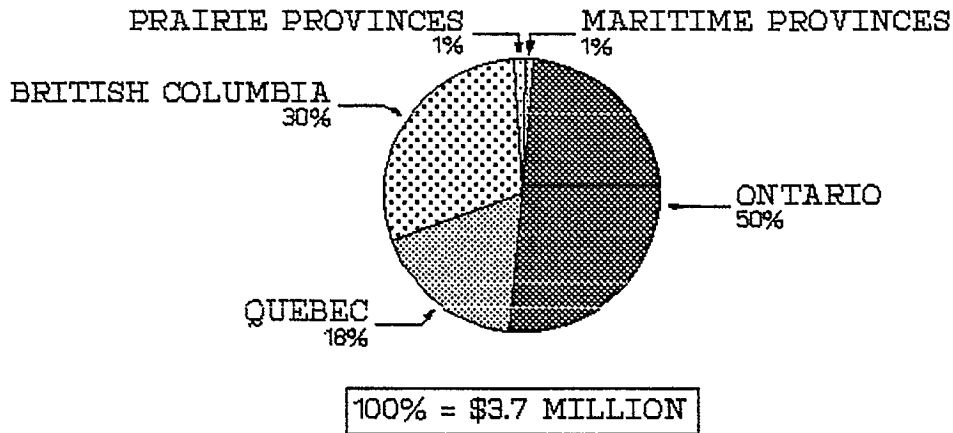
SUMMARY OF IMPORTS  
BY FLAVOUR AND COUNTRY OF ORIGIN

JAMS

| <u>Flavour</u>           | <u>Country of Origin</u>  | <u>Value (\$000)</u> | <u>% of Total Value</u> |
|--------------------------|---------------------------|----------------------|-------------------------|
| Strawberry               | Yugoslavia                | 340                  | 9                       |
|                          | United Kingdom            | 155                  | 4                       |
|                          | Denmark & Poland*         | 234                  | 6                       |
|                          | United States             | 79                   | 2                       |
|                          | Bulgaria & France*        | 140                  | 4                       |
|                          | Others                    | 166                  | 5                       |
|                          | <b>Total</b>              | <b>1113</b>          | <b>30</b>               |
| Raspberry                | Yugoslavia                | 273                  | 7                       |
|                          | Denmark                   | 152                  | 4                       |
|                          | France                    | 74                   | 2                       |
|                          | Poland                    | 73                   | 2                       |
|                          | United Kingdom            | 50                   | 1                       |
|                          | Others                    | 145                  | 4                       |
|                          | <b>Total</b>              | <b>767</b>           | <b>21</b>               |
| Apricot                  | Denmark                   | 57                   | 2                       |
|                          | Yugoslavia                | 50                   | 1                       |
|                          | France                    | 48                   | 1                       |
|                          | Bulgaria & United States* | 51                   | 1                       |
|                          | United Kingdom            | 23                   | 1                       |
|                          | Others                    | 70                   | 2                       |
| <b>Total</b>             | <b>298</b>                | <b>8</b>             |                         |
| Cherry                   | Yugoslavia                | 77                   | 2                       |
|                          | Denmark                   | 47                   | 1                       |
|                          | Switzerland               | 24                   | 1                       |
|                          | Poland                    | 23                   | 1                       |
|                          | Others                    | 109                  | 3                       |
|                          | <b>Total</b>              | <b>280</b>           | <b>8</b>                |
| Currant, Black           | United Kingdom            | 113                  | 3                       |
|                          | Poland & Denmark*         | 87                   | 2                       |
|                          | Others                    | 75                   | 2                       |
|                          | <b>Total</b>              | <b>275</b>           | <b>8</b>                |
| Others                   | United Kingdom            | 324                  | 9                       |
|                          | Yugoslavia                | 145                  | 4                       |
|                          | France                    | 118                  | 3                       |
|                          | Denmark                   | 131                  | 4                       |
|                          | United States             | 112                  | 3                       |
|                          | Others                    | 100                  | 3                       |
|                          | <b>Total</b>              | <b>930</b>           | <b>25</b>               |
| <b>TOTAL, JAMS</b>       |                           | <b>3 663</b>         | <b>100</b>              |
| <u>MARMALADES</u>        | United Kingdom            | 661                  | 81                      |
|                          | United States             | 83                   | 10                      |
|                          | Switzerland               | 31                   | 4                       |
|                          | France                    | 17                   | 2                       |
|                          | Other Countries           | 27                   | 3                       |
| <b>TOTAL, MARMALADES</b> |                           | <b>820</b>           | <b>100</b>              |

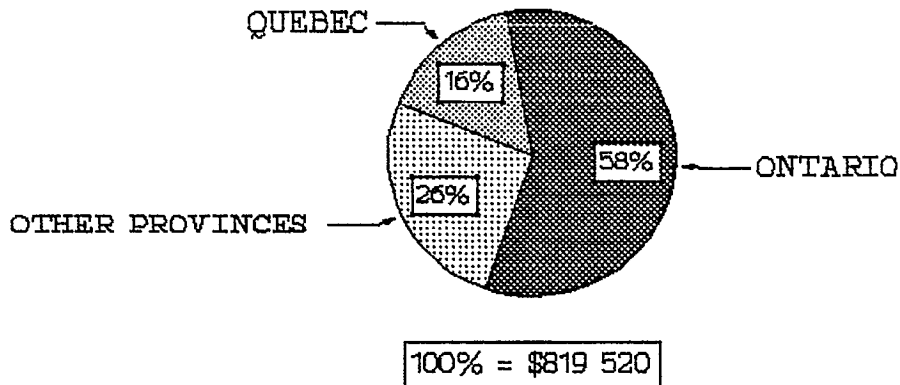
\* Aggregated in order to preserve confidentiality of Canadian importers.

PROVINCE OF CONSIGNEE - JAMS



Ontario was the major province of consignee for the imports of jams, with \$1.8 million or 50 per cent of the total dollar value. British Columbia followed with \$1.1 million or 30 per cent.

PROVINCE OF CONSIGNEE - MARMALADES



OTHER PROVINCES WERE BRITISH COLUMBIA AND NOVA SCOTIA

Ontario was also the major province of consignee for the imports of marmalades. It accounted for \$476 000 or 58 per cent of the value of imports.

There were 69 known consignees/importers of jams and marmalades during the period July to December 1987. The principal 25 consignees/importers accounted for \$3.8 million or 85 per cent of the total dollar value of imports. All consignees/importers are listed in alphabetical order in Appendix D.

IMPORT MARKET CONCENTRATION  
JULY TO DECEMBER 1987

| <u>Principal</u><br><u>Consignees/Importers</u><br><u>(By Value)</u> | <u>Cumulative</u><br><u>Value</u><br><u>(\$)</u> | <u>Cumulative %</u><br><u>of Total Value</u> |
|--|--|--|
| 3  | 1 255 439  | 28   |
| 6  | 1 889 108  | 42   |
| 10   | 2 495 606  | 56   |
| 15   | 3 071 032  | 69   |
| 20   | 3 516 008  | 78   |
| 25   | 3 798 762  | 85   |
| 30   | 3 998 709  | 89   |
| 35   | 4 125 079  | 92   |
| 40   | 4 223 780  | 94   |
| All Consignees/<br>Importers (69)                                    | 4 482 628  | 100  |

V. CANADIAN PRODUCTION

Statistics Canada reports that in 1985, Canadian shipments of jams and marmalades were valued at \$62.7 million and \$10.9 million respectively. These are the latest figures available.

VI. MARKET SUMMARY

The Canadian jam industry accounted for 2 per cent (1983) of the fruit and vegetable sector and over the 5 year period, 1979-1983 significant declines in sales were indicated. Declining domestic sales are attributable to imports as well as declining per capita consumption of sugar-containing products. This trend has been reinforced by consumer demand for nutritious, non fattening foods.

The gourmet sector, however, appears to be a potential growth area and one that is not affected by consumers' concerns for sugar-reduced products. In fact, demographic trends (aging population, increased disposable income) lend themselves to future growth in the demand for high quality products that can provide textures and tastes different from traditional jams and marmalades. These traditional products have been the mainstay of the industry and have primarily been marketed through chain grocery stores or packaged into single serving portions for the food service industry.

Gourmet jams are usually distinct from traditional products as the contents contain more fruit, provide different variations of traditional fruit and may be honey-based. Some marmalade products are made with unrefined sugar, which would appeal to health-conscious individuals, while other marmalades may include different sizes of peel cuts for different textured effects, along with addition of ginger, other fruits or alcohol. They are normally retailed at a premium price and marketed through specialty food shops.

There are no available figures on the production of gourmet jams and marmalades in Canada. However, it is known that there is a small cottage industry and some medium size processors that are servicing regional markets. Consistency and quality of product remain the key factors to competing in the gourmet sector.

IMPORTS OF JAMS AND MARMALADES  
BY FLAVOUR AND JAR SIZE  
JULY TO DECEMBER 1987

JAMS

| <u>Flavour</u>        | <u>Jar Size</u>  | <u>Quantity</u><br>(Number) | <u>Value</u><br>(\$) | <u>Average</u><br><u>Unit Price</u><br>(\$/Jar) |
|-----------------------|--|-----------------------------|----------------------|---|
| Strawberry            | 15 grams)<br>30 grams)*<br>42.5 grams)                   | 351 500                     | 88 280               | .25   |
|                       | 50 grams)<br>283 grams)* (10 oz. equivalent)             | 18 150                      | 16 211               | .89   |
|                       | 340 grams) (12 oz. equivalent)<br>370 grams)*            | 56 268                      | 43 308               | .77   |
|                       | 480 grams)<br>500 grams)*                                | 166 380                     | 93 942               | .56   |
|                       | 28 milliliters)<br>32 milliliters)*<br>215 milliliters)  | 194 184                     | 50 577               | .26   |
|                       | 250 milliliters  | 158 880                     | 111 865              | .70   |
|                       | 375 milliliters  | 242 934                     | 148 080              | .61   |
|                       | 500 milliliters  | 83 400                      | 40 429               | .48   |
|                       | 750 milliliters  | 347 544                     | 258 220              | .74   |
|                       | Not known  | -                           | <u>255 474</u>       |   |
| Sub-Total, Strawberry |  |                             | 1 106 386            |   |
| Raspberry             | 15 grams)<br>42.5 grams)*<br>50 grams)                   | 197 100                     | 34 210               | .17   |
|                       | 250 grams)<br>283 grams)* (10 oz. equivalent)            | 4 548                       | 6 390                | 1.41  |
|                       | 340 grams) (12 oz. equivalent)                           | 28 380                      | 23 614               | .83   |
|                       | 370 grams  | 7 524                       | 9 991                | 1.33  |
|                       | 480 grams  | 24 480                      | 20 980               | .86   |
|                       | 32 milliliters)<br>215 milliliters)*<br>350 milliliters) | 34 116                      | 12 688               | .37   |

IMPORTS OF JAMS AND MARMALADES  
BY FLAVOUR AND JAR SIZE (CONT'D)  
JULY TO DECEMBER 1987

JAMS

| <u>Flavour</u>       | <u>Jar Size</u>                | <u>Quantity</u><br>(Number) | <u>Value</u><br>(\$) | <u>Average</u><br><u>Unit Price</u><br>(\$/Jar) |
|----------------------|--------------------------------|-----------------------------|----------------------|---|
| Raspberry (Cont'd)   | 250 milliliters                | 91 872                      | 80 638               | .88   |
|                      | 375 milliliters                | 208 760                     | 136 842              | .66   |
|                      | 500 milliliters                | 113 400                     | 53 765               | .47   |
|                      | 750 milliliters                | 252 870                     | 203 192              | .80   |
|                      | Not known                      | -                           | <u>164 070</u>       |   |
| Sub-Total, Raspberry |                                |                             | <u>746 380</u>       |   |
| Apricot              | 50 grams)                      |                             |                      |   |
|                      | 250 grams)*                    | 11 736                      | 6 212                | .53   |
|                      | 283 grams                      | 3 960                       | 6 282                | 1.59  |
|                      | 340 grams (12 oz. equivalent)  | 24 600                      | 15 080               | .61   |
|                      | 370 grams)                     |                             |                      |   |
|                      | 375 grams)*                    | 4 512                       | 4 804                | 1.06  |
|                      | 454 grams) (16 oz. equivalent) |                             |                      |   |
|                      | 480 grams)*                    | 66 900                      | 48 123               | .72   |
|                      | 500 grams)                     |                             |                      |   |
|                      | 992 grams) (35 oz. equivalent) |                             |                      |   |
|                      | 28 milliliters)                |                             |                      |   |
|                      | 215 milliliters)*              | 36 756                      | 8 844                | .24   |
|                      | 250 milliliters                | 69 408                      | 57 216               | .82   |
| 370 milliliters)     |                                |                             |                      |   |
| 375 milliliters)*    | 162 576                        | 90 969                      | .56                  |   |
| 500 milliliters      | 32 700                         | 15 210                      | .47                  |   |
| 750 milliliters      | 13 380                         | 13 313                      | .99                  |   |
| Not known            | -                              | <u>32 310</u>               |                      |   |
| Sub-Total, Apricot   |                                |                             | <u>298 363</u>       |   |
| Currant, Black       | 42.5 grams)                    |                             |                      |   |
|                      | 250 grams)*                    | 62 928                      | 30 324               | .48   |
|                      | 340 grams) (12 oz. equivalent) |                             |                      |   |

IMPORTS OF JAMS AND MARMALADES  
BY FLAVOUR AND JAR SIZE (CONT'D)  
JULY TO DECEMBER 1987

JAMS

| <u>Flavour</u>             | <u>Jar Size</u>                       | <u>Quantity</u><br>(Number) | <u>Value</u><br>(\$) | <u>Average</u><br><u>Unit Price</u><br>(\$/Jar) |
|----------------------------|---------------------------------------|-----------------------------|----------------------|---|
| Currant, Black<br>(Cont'd) | 480 grams)                            |                             |                      |   |
|                            | 500 grams)*                           | 21 696                      | 14 233               | .66   |
|                            | 28 milliliters                        | 285 840                     | 56 219               | .20   |
|                            | 250 milliliters                       | 59 652                      | 58 744               | .98   |
|                            | 375 milliliters                       | 119 700                     | 70 558               | .59   |
|                            | 326 milliliters)<br>500 milliliters)* | 19 164                      | 8 916                | .47   |
|                            | Not known                             | -                           | <u>35 997</u>        |   |
| Sub-Total, Currant, Black  |                                       |                             | 274 991              |   |
| Blackberry                 | 283 grams) (10 oz. equivalent)        |                             |                      |   |
|                            | 340 grams)                            | 2 340                       | 3 417                | 1.46  |
|                            | 369 grams)* (13 oz. equivalent)       |                             |                      |   |
|                            | 375 grams)                            |                             |                      |   |
|                            | 250 milliliters                       | 3 600                       | 3 766                | 1.05  |
|                            | 375 milliliters                       | 85 560                      | 61 629               | .72   |
|                            | 750 milliliters                       | 31 440                      | 28 676               | .91   |
|                            | Not known                             | -                           | <u>65 228</u>        |   |
| Sub-Total, Blackberry      |                                       |                             | 162 716              |   |
| Cherry                     | 50 grams)                             |                             |                      |   |
|                            | 370 grams)*                           | 9 912                       | 9 137                | .92   |
|                            | 480 grams                             | 12 132                      | 8 956                | .74   |
|                            | 250 milliliters                       | 18 000                      | 12 713               | .71   |
|                            | 375 milliliters                       | 24 768                      | 7 113                | .29   |
|                            | Not known                             | -                           | <u>45 165</u>        |   |
| Sub-Total, Cherry          |                                       |                             | 83 084               |   |



IMPORTS OF JAMS AND MARMALADES  
BY FLAVOUR AND JAR SIZE (CONT'D)  
JULY TO DECEMBER 1987

JAMS

| <u>Flavour</u>           | <u>Jar Size</u>   | <u>Quantity</u><br>(Number) | <u>Value</u><br>(\$) | <u>Average</u><br><u>Unit Price</u><br>(\$/Jar) |
|--------------------------|---|-----------------------------|----------------------|---|
| Cherry, Black            | 15 grams)<br>283 grams)*                                  | 110 040                     | 13 602               | .12   |
|                          | 340 grams)<br>375 grams)*                                 | 3 420                       | 5 293                | 1.55  |
|                          | 250 milliliters)<br>375 milliliters)*<br>750 milliliters) | 52 920                      | 48 575               | .92   |
|                          | Not known   | -                           | <u>12 422</u>        |   |
| Sub-Total, Cherry, Black |   |                             | <u>79 892</u>        |   |
| Cherry, Sour             | 375 milliliters   | 73 068                      | 31 207               | .43   |
|                          | 500 milliliters   | 28 200                      | 12 683               | .45   |
|                          | 750 milliliters   | 30 720                      | 19 289               | .63   |
|                          | Not known   | -                           | <u>13 876</u>        |   |
| Sub-Total, Cherry, Sour  |   |                             | <u>77 055</u>        |   |
| Peach                    | 340 grams)<br>370 grams)*                                 | 4 512                       | 4 058                | .90   |
|                          | 480 grams   | 7 620                       | 7 184                | .94   |
|                          | 215 milliliters)<br>500 milliliters)*                     | 20 820                      | 10 136               | .49   |
|                          | 250 milliliters   | 7 584                       | 5 886                | .78   |
|                          | 375 milliliters   | 77 160                      | 41 092               | .53   |
|                          | Not known   | -                           | <u>4 925</u>         |   |
| Sub-Total, Peach         |   |                             | <u>73 281</u>        |   |
| Orange                   | 283 grams (10 oz. equivalent)                             | 1 200                       | 1 981                | 1.65  |
|                          | 370 grams)<br>375 grams)*                                 | 2 412                       | 3 238                | 1.34  |
|                          | 480 grams   | 13 080                      | 8 232                | .63   |
|                          | 250 milliliters   | 15 276                      | 7 412                | .49   |

IMPORTS OF JAMS AND MARMALADES  
BY FLAVOUR AND JAR SIZE (CONT'D)  
JULY TO DECEMBER 1987

JAMS

| <u>Flavour</u>                | <u>Jar Size</u>  | <u>Quantity</u><br>(Number) | <u>Value</u><br>(\$) | <u>Average</u><br><u>Unit Price</u><br>(\$/Jar) |
|-------------------------------|--|-----------------------------|----------------------|---|
| Orange (Cont'd)               | 375 milliliters  | 38 640                      | 26 272               | .68   |
|                               | 750 milliliters  | 3 450                       | 3 835                | 1.11  |
|                               | Not known  | -                           | <u>5 754</u>         |   |
| Sub-Total, Orange             |  |                             | 56 724               |   |
| Plum                          | 340 grams)   | 9 744                       | 6 910                | .71   |
|                               | 375 grams)*  |                             |                      |   |
|                               | 480 grams)   |                             |                      |   |
|                               | 250 milliliters  | 20 146                      | 3 172                | .16   |
|                               | 375 milliliters  | 52 056                      | 21 515               | .41   |
|                               | 500 milliliters)<br>750 milliliters)*                    | 27 060                      | 13 442               | .50   |
| Sub-Total, Plum               |  |                             | <u>11 423</u>        |   |
|                               |  |                             | 56 462               |   |
| Cherry, Morello               | 375 grams)   | 24 240                      | 12 772               | .53   |
|                               | 500 grams)*  |                             |                      |   |
|                               | 28 milliliters)<br>250 milliliters)*<br>375 milliliters) | 101 688                     | <u>26 883</u>        | .26   |
| Sub-Total, Cherry,<br>Morello |  |                             | 39 655               |   |
| Currant, Red                  | 28 milliliters )   | 115 800                     | 26 241               | .23   |
|                               | 32 milliliters )   |                             |                      |   |
|                               | 250 milliliters)*  |                             |                      |   |
|                               | 375 milliliters)<br>500 milliliters)                     |                             |                      |   |
| Sub-Total, Currant, Red       |  |                             | <u>7 707</u>         |   |
|                               |  |                             | 33 948               |   |
| Gooseberry                    | 340 grams (12 oz. equivalent)                            | 13 200                      | 8 363                | .63   |
|                               | 250 milliliters  | 468                         | 434                  | .93   |

APPENDIX A

IMPORTS OF JAMS AND MARMALADES  
BY FLAVOUR AND JAR SIZE (CONT'D)  
JULY TO DECEMBER 1987

JAMS

| <u>Flavour</u>                        | <u>Jar Size</u>  | <u>Quantity</u><br>(Number) | <u>Value</u><br>(\$) | <u>Average</u><br><u>Unit Price</u><br>(\$/Jar) |
|---------------------------------------|--|-----------------------------|----------------------|---|
| Gooseberry (Cont'd)                   | 375 milliliters  | 22 032                      | 7 491                | .34   |
|                                       | Not known  | -                           | <u>3 788</u>         |   |
| Sub-Total, Gooseberry                 |  |                             | 20 076               |   |
| Ginger                                | 28 milliliters)<br>250 milliliters)*                     | 75 684                      | 16 932               | .22   |
| Blueberry                             | 283 grams (10 oz. equivalent)                            | 2 400                       | 4 130                | 1.72  |
|                                       | 370 grams (13 oz. equivalent)                            | 3 420                       | 5 202                | 1.52  |
|                                       | 28 milliliters)<br>215 milliliters)*<br>250 milliliters) | 9 996                       | 5 933                | .59   |
|                                       | Not known  | -                           | <u>664</u>           |   |
| Sub-Total, Blueberry                  |  |                             | 15 929               |   |
| Four Fruits                           | 370 grams  | 7 752                       | 9 563                | 1.23  |
|                                       | 250 milliliters  | 5 760                       | <u>5 996</u>         | <u>1.04</u>                                     |
| Sub-Total, Four Fruits                |  |                             | 15 559               |   |
| Quince                                | 650 grams)<br>992 grams)* (35 oz. equivalent)            | 2 760                       | 2 279                | .83   |
|                                       | Not known  | -                           | <u>9 895</u>         |   |
| Sub-Total, Quince                     |  |                             | 12 174               |   |
| Raspberry, Red,<br>Seedless           | 283 grams)<br>340 grams)*                                | 2 100                       | 3 158                | 1.50  |
|                                       | 28 milliliters)<br>250 milliliters)*                     | 14 472                      | <u>7 466</u>         | .52   |
| Sub-Total, Raspberry<br>Red, Seedless |  |                             | 10 624               |   |
| Raspberry with<br>Grand Marnier       | 340 grams) (12 oz. equivalent)<br>250 milliliters)*      | -                           | 9 520                |   |

IMPORTS OF JAMS AND MARMALADES  
BY FLAVOUR AND JAR SIZE (CONT'D)  
JULY TO DECEMBER 1987

JAMS

| <u>Flavour</u>               | <u>Jar Size</u>                 | <u>Quantity</u><br>(Number) | <u>Value</u><br>(\$) | <u>Average</u><br><u>Unit Price</u><br>(\$/Jar) |
|------------------------------|---------------------------------|-----------------------------|----------------------|---|
| Rosehip                      | 375 milliliters)                | 15 840                      | 7 118                | .45   |
|                              | 750 milliliters)*               |                             |                      |   |
|                              | Not known                       | -                           | <u>1 311</u>         |   |
| Sub-Total, Rosehip           |                                 |                             | 8 429                |   |
| Bilberry                     | 250 milliliters                 | 3 600                       | 4 726                | 1.31  |
|                              | Not known                       | -                           | <u>3 553</u>         |   |
| Sub-Total, Bilberry          |                                 |                             | 8 279                |   |
| Greengage                    | 370 grams                       | 5 496                       | 4 606                | .84   |
|                              | 250 milliliters                 | 2 376                       | <u>2 473</u>         | 1.04  |
| Sub-Total, Greengage         |                                 |                             | 7 079                |   |
| Blackberry,<br>Seedless      | 283 grams) (10 oz. equivalent)  | 6 060                       | 6 981                | 1.15  |
|                              | 340 grams)* (12 Oz. equivalent) |                             |                      |   |
| Rhubarb                      | 250 milliliters)                | 9 216                       | 6 900                | .75   |
|                              | 370 milliliters)*               |                             |                      |   |
| Strawberry<br>With Cointreau | 225 grams)                      | -                           | 6 659                |   |
|                              | 250 grams)*                     |                             |                      |   |
|                              | Not known)                      |                             |                      |   |
| Damson                       | 250 grams)                      | 2 664                       | 2 407                | .90   |
|                              | 370 grams)*                     |                             |                      |   |
|                              | Not known                       | -                           | <u>1 592</u>         |   |
| Sub-Total, Damson            |                                 |                             | 3 999                |   |
| Grape                        | 283 grams (10 oz. equivalent)   | 1 260                       | 1 821                | 1.45  |
|                              | Not known                       | -                           | <u>1 531</u>         |   |
| Sub-Total, Grape             |                                 |                             | 3 352                |   |

IMPORTS OF JAMS AND MARMALADES  
BY FLAVOUR AND JAR SIZE (CONT'D)  
JULY TO DECEMBER 1987

JAMS

| <u>Flavour</u>                   | <u>Jar Size</u>                | <u>Quantity</u><br>(Number) | <u>Value</u><br>(\$) | <u>Average</u><br><u>Unit Price</u><br>(\$/Jar) |
|----------------------------------|--------------------------------|-----------------------------|----------------------|---|
| Other**                          | 30 grams)                      |                             |                      |   |
|                                  | 42 grams)                      |                             |                      |   |
|                                  | 340 grams)                     |                             |                      |   |
|                                  | 375 grams)*                    | 13 475                      | 18 515               | 1.37  |
|                                  | 454 grams) (16 oz. equivalent) |                             |                      |   |
|                                  | 650 grams)                     |                             |                      |   |
|                                  | 992 grams) (35 oz. equivalent) |                             |                      |   |
|                                  | 250 milliliters                | 34 104                      | 29 380               | .86   |
|                                  | 350 milliliters)               |                             |                      |   |
|                                  | 375 milliliters)*              | 21 060                      | 11 517               | .55   |
| 400 milliliters)                 |                                |                             |                      |   |
| 500 milliliters)*                | 7 200                          | 4 861                       | .68                  |   |
|                                  | Not known                      | -                           | <u>45 625</u>        |   |
| Sub-Total, Other**               |                                |                             | 109 898              |   |
| Not Known                        | Not known                      | -                           | 196 325              |   |
| Gift Packs (Flavours Not Known): |                                |                             |                      |   |
| Jams and jellies                 | Not known                      | -                           | 55 938               |   |
| Jams and Marmalades              | Not known                      | -                           | <u>59 518</u>        |   |
| Sub-Total, Gift Packs            |                                |                             | 115 456              |   |
| Total, Jams                      |                                |                             | 3 663 108            |   |

\* Aggregated in order to preserve confidentiality of Canadian importers.

\*\* Other includes: Boysenberry, Coco, Coconut, Fig, Forest Berry, Garden Berry, Guava Pumpkin, Kiwi, Lemon Melon, Mixed Jam (Apple, Pear, Walnut), Passion Fruit, Pineapple, Pineapple Guava, Pineapple Pumpkin, Plum Butter, Pumpkin Orange, Rose-Leaves, Rose Petal, Seedless Bramble, Strawberry Rhubarb, Tangerine, Tropical Fruit, Wild Cranberries and Wild Rose. No single flavour dominated in these products

IMPORTS OF JAMS AND MARMALADES  
BY FLAVOUR AND JAR-SIZE (CONT'D)  
JULY TO DECEMBER 1987

MARMALADES

| <u>Flavour</u>                    | <u>Jar Size</u>   | <u>Quantity</u><br>(Number) | <u>Value</u><br>(\$) | <u>Average</u><br><u>Unit Price</u><br>(\$/Jar) |
|-----------------------------------|-------------------|-----------------------------|----------------------|---|
| Ginger                            | 250 milliliters   | 160 452                     | 146 874              | .92   |
|                                   | Not known         | -                           | <u>30 117</u>        |   |
| Sub-Total, Ginger                 |                   |                             | 176 991              |   |
| Orange                            | 42 grams)         |                             |                      |   |
|                                   | 50 grams)*        | 61 136                      | 22 139               | .36   |
|                                   | 370 grams)        |                             |                      |   |
|                                   | 13 milliliters)   |                             |                      |   |
|                                   | 28 milliliters)*  | 79 200                      | 30 157               | .38   |
|                                   | 250 milliliters)  |                             |                      |   |
|                                   | Not known         | -                           | <u>61 342</u>        |   |
| Sub-Total, Orange                 |                   |                             | 113 638              |   |
| Orange, Thick Cut                 | 28 milliliters)   |                             |                      |   |
|                                   | 250 milliliters)* | 209 460                     | 71 275               | .34   |
| Golden Shred                      | 250 milliliters   | 90 168                      | 63 878               | .71   |
|                                   | Not known         | -                           | <u>3 474</u>         |   |
| Sub-Total, Golden Shred           |                   |                             | 67 352               |   |
| Lime                              | 250 milliliters   | 11 856                      | 12 680               | 1.07  |
|                                   | Not known         | -                           | <u>3 200</u>         |   |
| Sub-Total, Lime                   |                   |                             | 15 880               |   |
| Orange Thick Cut<br>With Drambuie | 258 grams)        |                             |                      |   |
|                                   | 250 milliliters)* | 7 804                       | 9 357                | 1.20  |
|                                   | 375 milliliters)  |                             |                      |   |
| Orange with Whisky                | 225 grams)        |                             |                      |   |
|                                   | 250 milliliters)* | 4 356                       | 7 427                | 1.71  |
|                                   | 375 milliliters)  |                             |                      |   |

IMPORTS OF JAMS AND MARMALADES  
BY FLAVOUR AND JAR SIZE (CONT'D)  
JULY TO DECEMBER 1987

MARMALADES

| <u>Flavour</u>       | <u>Jar Size</u>  | <u>Quantity</u><br>(Number) | <u>Value</u><br>(\$) | <u>Average</u><br><u>Unit Price</u><br>(\$/Jar) |
|----------------------|------------------|-----------------------------|----------------------|---|
| Not Known            | 15 grams)        | 156 000                     | 21 523               | .14   |
|                      | 425 grams)*      |                             |                      |   |
|                      | 227 grams)       | 44 836                      | 41 436               | .92   |
|                      | 258 grams)*      |                             |                      |   |
|                      | 340 grams)       |                             |                      |   |
|                      | 28 milliliters)  | 174 528                     | 34 105               | .20   |
|                      | 32 milliliters)* |                             |                      |   |
| 250 milliliters      | 210 060          | 160 037                     | .76                  |   |
| Not known            | -                | <u>100 499</u>              |                      |   |
| Sub-Total, Not Known |                  |                             | 357 600              |   |
| Total, Marmalades    |                  |                             | 819 520              |   |

\* Aggregated in order to preserve confidentiality of Canadian importers.

APPENDIX B

IMPORTS OF JAMS AND MARMALADES  
BY COUNTRY OF ORIGIN AND FLAVOUR  
JULY TO DECEMBER 1987

| <u>JAMS</u>              |                       |                                      |                      |                                     |      |
|--------------------------|-----------------------|--------------------------------------|----------------------|-------------------------------------|------|
| <u>Country of Origin</u> | <u>Flavour</u>        | <u>Quantity</u><br>(milliliters 000) | <u>Value</u><br>(\$) | <u>Average Price</u><br>(\$/000 ml) |      |
| Belgium:                 | Apricot               |                                      | 16 164               |                                     |      |
|                          | Cherry                |                                      | 6 496                |                                     |      |
|                          | Currant, Black        |                                      | 6 512                |                                     |      |
|                          | Orange                |                                      | 5 447                |                                     |      |
|                          | Peach                 |                                      | (1)                  |                                     |      |
|                          | Plum                  |                                      | 5 084                |                                     |      |
|                          | Raspberry             |                                      | 21 807               |                                     |      |
|                          | Rhubarb               |                                      | (1)                  |                                     |      |
|                          | Strawberry            |                                      | 25 261               |                                     |      |
|                          | Not Known             |                                      | 17 250               |                                     |      |
|                          | <b>Total, Belgium</b> | Quantity Known                       | <u>39 827</u>        | 86 949                              | 2.18 |
|                          |                       | Quantity Not Known                   | -                    | 23 110                              |      |
|                          |                       |                                      |                      | <u>110 059</u>                      |      |
| Denmark:                 | Apricot               |                                      | 56 642               |                                     |      |
|                          | Blackberry            |                                      | 57 973               |                                     |      |
|                          | Black Cherry          |                                      | 46 611               |                                     |      |
|                          | Currant, Black        |                                      | 35 655               |                                     |      |
|                          | Orange                |                                      | 37 121               |                                     |      |
|                          | Peach                 |                                      | (1)                  |                                     |      |
|                          | Raspberry             |                                      | 151 749              |                                     |      |
|                          | Strawberry            |                                      | (1)                  |                                     |      |
|                          | Not Known             |                                      | 3 318                |                                     |      |
| <b>Total, Denmark</b>    |                       | <u>271 978</u>                       | <u>557 797</u>       | 2.05                                |      |
| France:                  | Apricot               |                                      | 47 480               |                                     |      |
|                          | Bilberry              |                                      | 8 279                |                                     |      |
|                          | Blackberry            |                                      | 3 758                |                                     |      |
|                          | Black Cherry          |                                      | (1)                  |                                     |      |
|                          | Blueberry             |                                      | 5 195                |                                     |      |
|                          | Cherry                |                                      | 21 206               |                                     |      |
|                          | Cherry, Morello       |                                      | (1)                  |                                     |      |
|                          | Currant, Black        |                                      | 18 111               |                                     |      |
|                          | Damson                |                                      | (1)                  |                                     |      |
|                          | Four Fruits           |                                      | 15 559               |                                     |      |
|                          | Greengage             |                                      | 7 079                |                                     |      |
|                          | Orange                |                                      | 8 719                |                                     |      |
|                          | Peach                 |                                      | 14 959               |                                     |      |
|                          | Plum                  |                                      | 1 076                |                                     |      |
|                          | Raspberry             |                                      | 73 952               |                                     |      |
|                          | Rhubarb               |                                      | 4 466                |                                     |      |
|                          | Strawberry            |                                      | 62 803               |                                     |      |
|                          | Not Known             |                                      | 38 152               |                                     |      |
|                          | <b>Total, France</b>  | Quantity Known                       | <u>63 747</u>        | 272 831                             | 4.27 |
|                          |                       | Quantity Not Known                   | -                    | 60 309                              |      |
|                          |                       |                                      | <u>333 140</u>       |                                     |      |

(1) Confidential - Included in total



APPENDIX B

IMPORTS OF JAMS AND MARMALADES  
BY COUNTRY OF ORIGIN AND FLAVOUR (CONT'D)  
JULY TO DECEMBER 1987

| <u>JAMS</u><br><u>Country of</u><br><u>Origin</u> | <u>Flavour</u>          | <u>Quantity</u><br>(milliliters 000) | <u>Value</u><br>(\$) | <u>Average</u><br><u>Price</u><br>(\$/000 ml) |
|---|-------------------------|--------------------------------------|----------------------|---|
| Poland:   | Cherry                  |                                      | 23 161               |   |
|   | Currant, Black          |                                      | 51 599               |   |
|   | Gooseberry              |                                      | (1)                  |   |
|   | Plum                    |                                      | (1)                  |   |
|   | Raspberry               |                                      | 73 431               |   |
|   | Strawberry              |                                      | 85 004               |   |
|   | Not Known               |                                      | 2 328                |   |
|   | <b>Total, Poland</b>    | Quantity Known                       | <u>53 550</u>        | 57 213  |
|   | Quantity Not Known      | -                                    | <u>191 095</u>       |   |
|   |                         |                                      | <u>248 308</u>       |   |
| Switzerland:                                      | Apricot                 |                                      | (1)                  |   |
|   | Blackberry              |                                      | (1)                  |   |
|   | Black Cherry            |                                      | 22 559               |   |
|   | Cherry                  |                                      | 1 553                |   |
|   | Currant, Black          |                                      | (1)                  |   |
|   | Gooseberry              |                                      | (1)                  |   |
|   | Peach                   |                                      | (1)                  |   |
|   | Plum                    |                                      | (1)                  |   |
|   | Raspberry               |                                      | 29 203               |   |
|   | Strawberry              |                                      | 42 767               |   |
|   | Not Known               |                                      | 15 850               |   |
| <b>Total, Switzerland</b>                         | Quantity Known          | <u>5 996</u>                         | 52 507               | 8.75  |
|   | Quantity Not Known      | -                                    | <u>69 066</u>        |   |
|   |                         |                                      | <u>121 573</u>       |   |
| United Kingdom:                                   | Apricot                 |                                      | 22 880               |   |
|   | Blueberry               |                                      | (1)                  |   |
|   | Cherry, Black           |                                      | 7 383                |   |
|   | Cherry, Morello         |                                      | (1)                  |   |
|   | Currant, Black          |                                      | 112 605              |   |
|   | Currant, Red            |                                      | 20 215               |   |
|   | Damson                  |                                      | 2 357                |   |
|   | Ginger                  |                                      | 16 932               |   |
|   | Gooseberry              |                                      | 434                  |   |
|   | Orange                  |                                      | (1)                  |   |
|   | Plum                    |                                      | (1)                  |   |
|   | Raspberry               |                                      | 49 669               |   |
|   | Raspberry, Red Seedless |                                      | 7 466                |   |
| Raspberry with Grand Marnier                      |                         | (1)                                  |                      |   |
| Strawberry  |                         | 155 051                              |                      |   |

(1) Confidential - Included in total

APPENDIX B

IMPORTS OF JAMS AND MARMALADES  
BY COUNTRY OF ORIGIN AND FLAVOUR (CONT'D)  
JULY TO DECEMBER 1987

| <u>JAMS</u><br><u>Country of</u><br><u>Origin</u> | <u>Flavour</u>            | <u>Quantity</u><br><u>(milliliters 000)</u> | <u>Value</u><br><u>(\$)</u> | <u>Average</u><br><u>Price</u><br><u>(\$/000 ml)</u> |
|---|---------------------------|---|-----------------------------|--|
| United Kingdom (Cont'd)                           | Strawberry with Cointreau |   | 6 659                       |  |
|   | Not Known                 |   | 118 468                     |  |
|   | Gift Packs:               |   |                             |  |
|   | Jams and Jellies          |   | (1)                         |  |
|   | Jams and Marmalade        |   | 59 519                      |  |
| Total, United Kingdom                             | Quantity Known            | 94 523                                      | 605 535                     | 6.40   |
|   | Quantity Not Known        | -   | 58 558                      |  |
|   |                           |   | <u>664 093</u>              |  |
| United States                                     | Apricot                   |   | 23 231                      |  |
|   | Blackberry                |   | 49 615                      |  |
|   | Blackberry, Seedless      |   | 6 981                       |  |
|   | Blueberry                 |   | 6 598                       |  |
|   | Cherry, Black             |   | 2 987                       |  |
|   | Grape                     |   | 3 352                       |  |
|   | Orange                    |   | 3 778                       |  |
|   | Peach                     |   | (1)                         |  |
|   | Raspberry                 |   | 31 331                      |  |
|   | Raspberry, Red Seedless   |   | 3 158                       |  |
|   | Strawberry                |   | 79 054                      |  |
|   | Not Known                 |   | 23 119                      |  |
|   | Gift Packs:               |   |                             |  |
| Jams and Jellies                                  |                           | (1)   |                             |  |
| Total, United States                              | Quantity Known            | 12 737                                      | 86 194                      | 6.82   |
|   | Quantity Not Known        | -   | 159 189                     |  |
|   |                           |   | <u>245 383</u>              |  |
| Yugoslavia:                                       | Apricot                   |   | 50 293                      |  |
|   | Blackberry                |   | 46 174                      |  |
|   | Cherry, Sour              |   | 77 055                      |  |
|   | Currant, Red              |   | (1)                         |  |
|   | Currant, Black            |   | (1)                         |  |
|   | Peach                     |   | (1)                         |  |
|   | Plum                      |   | 41 003                      |  |
|   | Quince                    |   | (1)                         |  |
|   | Raspberry                 |   | 272 877                     |  |
|   | Rosehip                   |   | 7 118                       |  |
|   | Strawberry                |   | 339 971                     |  |
|   | Not Known                 |   | 7 934                       |  |
|   | Total, Yugoslavia         | Quantity Known                              | 814 115                     | 770 235  |
| Quantity Not Known                                |                           | -   | 137 016                     |  |
|   |                           |   | <u>907 251</u>              |  |

(1) Confidential - Included in total

APPENDIX B

IMPORTS OF JAMS AND MARMALADES  
BY COUNTRY OF ORIGIN AND FLAVOUR (CONT'D)  
JULY TO DECEMBER 1987

| <u>JAMS</u><br><u>Country of</u><br><u>Origin</u>  | <u>Flavour</u>     | <u>Quantity</u><br>(milliliters 000) | <u>Value</u><br>(\$) | <u>Average</u><br><u>Price</u><br>(\$/000 ml) |
|--|--------------------|--------------------------------------|----------------------|---|
| Other Western European* Countries Including: Austria, Federal Republic of Germany, Greece, Ireland, Italy and The Netherlands  |                    |                                      |                      |   |
|  | Apricot            |                                      | 29 963               |   |
|  | Cherry             |                                      | 24 435               |   |
|  | Currant, Black     |                                      | 18 959               |   |
|  | Currant, Red       |                                      | 7 707                |   |
|  | Gooseberry         |                                      | 7 633                |   |
|  | Orange             |                                      | 1 359                |   |
|  | Peach              |                                      | 1 994                |   |
|  | Plum               |                                      | 1 994                |   |
|  | Raspberry          |                                      | 36 744               |   |
|  | Strawberry         |                                      | 71 366               |   |
|  | Rosehip            | -                                    | 1 311                |   |
|  | Not Known          |                                      | <u>39 820</u>        |   |
| Total, Other Western European Countries  | Quantity Known     | 67 081                               | 204 447              | 3.05  |
|  | Quantity Not Known | -                                    | <u>38 838</u>        |   |
|  |                    |                                      | <u>243 285</u>       |   |
| Other Countries:* Australia, Bulgaria, Hungary, Lebanon, Philippines, Singapore, Turkey Malaysia, Pakistan and Trinidad-Tobago |                    |                                      |                      |   |
|  | Apricot            |                                      | 47 314               |   |
|  | Blackberry         |                                      | 3 013                |   |
|  | Blueberry          |                                      | 284                  |   |
|  | Currant, Black     |                                      | 8 270                |   |
|  | Currant, Red       |                                      | 251                  |   |
|  | Cherry             |                                      | 6 233                |   |
|  | Cherry, Morello    |                                      | 16 173               |   |
|  | Gooseberry         |                                      | 1 877                |   |
|  | Orange             |                                      | 243                  |   |
|  | Peach              |                                      | 3 773                |   |
|  | Plum               |                                      | 260                  |   |
|  | Quince             |                                      | 2 279                |   |
|  | Raspberry          |                                      | 5 617                |   |
|  | Rhubarb            |                                      | 246                  |   |
|  | Strawberry         |                                      | 96 401               |   |
|  | Not Known          |                                      | <u>39 984</u>        |   |
| Total, Other Countries   | Quantity Known     | 143 889                              | 212 980              | 1.48  |
|  | Quantity Not Known | -                                    | <u>19 239</u>        |   |
| TOTAL JAMS,<br>ALL COUNTRIES   | Quantity Known     | 1 567 443                            | 2 906 688            | 1.85  |
|  | Quantity Not Known | -                                    | <u>756 420</u>       |   |
|  |                    |                                      | <u>3 663 108</u>     |   |

(1) Confidential - Included in total

\* Aggregated in order to preserve confidentiality of Canadian importers.

APPENDIX B

IMPORTS OF JAMS AND MARMALADES  
BY COUNTRY OF ORIGIN AND FLAVOUR (CONT'D)  
JULY TO DECEMBER 1987

| <u>MARMALADES</u><br><u>Country of</u><br><u>Origin</u> | <u>Flavour</u>                 | <u>Quantity</u><br><u>(milliliters 000)</u> | <u>Value</u><br><u>(\$)</u> | <u>Average</u><br><u>Price</u><br><u>(\$/000 ml)</u> |
|---|--------------------------------|---|-----------------------------|--|
| France:   | Not Known                      | 3 582                                       | 17 028                      | 4.75   |
| Switzerland:  | Not Known                      |   | <u>31 193</u>               |  |
|   | Quantity Known                 | 1 188                                       | 8 492                       | 7.15   |
|   | Quantity Not Known             | -   | <u>22 701</u>               |  |
| Total, Switzerland                                      |                                |   | <u>31 183</u>               |  |
| United States:  | Orange                         |   | 82 366                      |  |
|   | Not Known                      | -   | <u>567</u>                  |  |
| Total, United States                                    | Quantity Not Known             |   | <u>82 933</u>               |  |
| United Kingdom:   | Ginger                         |   | 176 991                     |  |
|   | Golden Shred                   |   | 67 352                      |  |
|   | Lime                           |   | (1)                         |  |
|   | Orange                         |   | (1)                         |  |
|   | Orange Thick Cut               |   | 71 275                      |  |
|   | Orange with Whisky             |   | 7 427                       |  |
|   | Orange Thick Cut with Drambuie |   | 9 357                       |  |
|   | Not Known                      |   | <u>304 803</u>              |  |
| Total, United Kingdom                                   | Quantity Known                 | 154 890                                     | 572 457                     | 3.70   |
|   | Quantity Not Known             | -   | <u>88 987</u>               |  |
|   |                                |   | 661 444                     |  |
| Ireland & Jamaica                                       | Not Known                      | 43 800                                      | 26 922                      |  |
| TOTAL MARMALADES, ALL COUNTRIES                         |                                |   | 819 520                     |  |

(1) Confidential - Included in total

IMPORTS OF JAMS AND MARMALADES  
BY JAR SIZE AND PRICE RANGE  
JULY TO DECEMBER 1987

| <u>JAMS</u>               | <u>Price</u> | <u>Quantity</u>      | <u>Value</u>   | <u>Average Unit</u> |
|---------------------------|--------------|----------------------|----------------|---------------------|
| <u>Jar Size</u>           | <u>Range</u> | <u>(000 of jars)</u> | <u>(\$000)</u> | <u>Price</u>        |
| Grams                     | (\$/Jar)     |                      |                | (\$/jar)            |
| 15                        | (1)          | (1)                  | (1)            |                     |
| 30                        | (1)          | (1)                  | (1)            |                     |
| 42, 42.5<br>& 50 *        | .27 to .43   | 383.3                | 115.4          | .30                 |
| 225 & 250 *               | .89 to 1.45  | 10.0                 | 11.0           | 1.10                |
| 283                       | 1.24 to 2.10 | 34.4                 | 50.0           | 1.45                |
| 340                       | .55 to 1.17  | 155.5                | 105.0          | .68                 |
|                           | 1.22 to 1.75 | 20.0                 | 30.9           | 1.55                |
|                           | 2.03 to 2.13 | <u>4.6</u>           | <u>9.4</u>     | <u>2.04</u>         |
| Sub-Total 340 grams       |              | 180.1                | 145.3          | .81                 |
| 369 & 370*                | .58 to .84   | 4.8                  | 3.9            | .81                 |
|                           | .85 to 1.53  | <u>42.3</u>          | <u>51.1</u>    | <u>1.21</u>         |
| Sub-Total 369 & 370 grams |              | 47.1                 | 55.0           | 1.17                |
| 375                       | (1)          | (1)                  | (1)            |                     |
| 454                       | .66 to .74   | 9.1                  | 6.1            | .67                 |
| 480                       | (1)          | (1)                  | (1)            |                     |
| 500                       | .51 to .57   | 225.9                | 121.7          | .54                 |
| 650                       | (1)          | (1)                  | (1)            | (1)                 |
| 992                       | .98 to 1.58  | 8.8                  | 12.8           | 1.45                |
| <b>Milliliters</b>        |              |                      |                |                     |
| 28                        | .19 to .23   | 727.2                | 145.0          | .20                 |
|                           | .33 to .92   | <u>72.7</u>          | <u>40.9</u>    | <u>.56</u>          |
| Sub-Total 28 milliliters  |              | 799.9                | 185.9          | .23                 |
| 28.4 & 32*                | .22 to .46   | 393.9                | 138.8          | .35                 |
| 150 & 215*                | (1)          | (1)                  | (1)            |                     |

\* Aggregated in order to preserve confidentiality of Canadian importers  
(1) Confidential included in total

IMPORTS OF JAMS AND MARMALADES  
BY JAR SIZE AND PRICE RANGE (CONT'D)  
JULY TO DECEMBER 1987

| <u>JAMS</u>               | <u>Price Range</u> | <u>Quantity</u>      | <u>Value</u>   | <u>Average Unit</u> |
|---------------------------|--------------------|----------------------|----------------|---------------------|
| <u>Jar Size</u>           | <u>Per Jar</u>     | <u>(000 of jars)</u> | <u>(\$000)</u> | <u>Price</u>        |
| Milliliters (Cont'd)      | (\$/Jar)           |                      |                | (\$/jar)            |
| 250                       | .09 to .37         | 148.1                | 39.7           | .27                 |
|                           | .69 to .79         | 118.3                | 84.5           | .71                 |
|                           | .81 to .90         | 92.9                 | 82.1           | .88                 |
|                           | .93 to .97         | 17.9                 | 17.2           | .96                 |
|                           | .98 to .99         | 10.1                 | 9.9            | .98                 |
|                           | 1.00 to 1.01       | 52.2                 | 52.3           | 1.00                |
|                           | 1.02 to 1.04       | 46.4                 | 48.2           | 1.04                |
|                           | 1.05 to 1.18       | 15.4                 | 17.7           | 1.15                |
|                           | 1.22 to 1.31       | 13.0                 | 16.6           | 1.28                |
|                           | 1.32 to 1.41       | 2.0                  | 2.8            | 1.40                |
|                           | 1.47 to 1.63       | 15.3                 | 24.3           | 1.59                |
|                           | 1.72 to 1.99       | <u>23.5</u>          | <u>44.4</u>    | <u>1.89</u>         |
| Sub-Total 250 Milliliters |                    | 555.1                | 439.7          | .79                 |
| 326 & 350                 | (1)                | (1)                  | (1)            |                     |
| 370                       | .67 to .95         | 17.8                 | 14.3           | .80                 |
| 375                       | .24 to .31         | 65.4                 | 18.0           | .28                 |
|                           | .32 to .38         | 162.0                | 58.3           | .36                 |
|                           | .39 to .40         | 123.3                | 48.4           | .39                 |
|                           | .41 to .48         | 163.1                | 71.7           | .44                 |
|                           | .50 to .54         | 177.0                | 93.0           | .53                 |
|                           | .55 to .60         | 19.2                 | 10.8           | .56                 |
|                           | .61 to .68         | 33.6                 | 21.2           | .63                 |
|                           | .69 to .86         | 149.4                | 107.3          | .72                 |
|                           | .87 to 1.11        | <u>307.3</u>         | <u>270.5</u>   | <u>.88</u>          |
| Sub-Total 375 milliliters |                    | 1 218.1              | 699.2          | .57                 |
| 400                       | (1)                | (1)                  | (1)            |                     |
| 500                       | .31 to .64         | 348.6                | 162.6          | .47                 |
| 750                       | .32 to .49         | 22.9                 | 8.2            | .36                 |
|                           | .50 to .63         | 307.9                | 177.8          | .58                 |
|                           | .64 to .77         | 200.6                | 137.4          | .68                 |
|                           | .83 to 1.03        | 59.1                 | 51.0           | .86                 |
|                           | 1.15 to 2.81       | <u>112.9</u>         | <u>169.3</u>   | <u>1.50</u>         |
| Sub-Total 750 milliliters |                    | 703.4                | 543.7          | .77                 |
| Not Known                 | -                  | -                    | 928.9          |                     |
| TOTAL, JAMS               |                    |                      | 3 663.1        |                     |

\* Aggregated in order to preserve confidentiality of Canadian importers  
(1) Confidential included in total

IMPORTS OF JAMS AND MARMALADES  
BY JAR SIZE AND PRICE RANGE (CONT'D)  
JULY TO DECEMBER 1987

MARMALADES

| <u>Jar Size</u>           | <u>Price Range</u><br><u>Per Jar</u><br><u>(\$/Jar)</u> | <u>Quantity</u><br><u>(000 of jars)</u> | <u>Value</u><br><u>(\$000)</u> | <u>Average Unit</u><br><u>Price</u><br><u>(\$/jar)</u> |
|---------------------------|---|---|--------------------------------|--|
| Grams                     |   |   |                                |  |
| 15, 42.5 & 50 *           | .08 to .38  | 212.6                                   | 39.8                           | .19  |
| 225, 227 & 258 *          | .93 to 4.35   | 14.0                                    | 28.3                           | 2.02   |
| 340 & 370 *               | .86 to 1.04   | 34.6                                    | 34.0                           | .98  |
| Milliliters               |   |   |                                |  |
| 13                        | (1)   | (1)                                     | (1)                            |  |
| 28 & 32 *                 | .19 to .33  | 394.3                                   | 79.5                           | .20  |
| 250                       | .69 to .75  | 251.4                                   | 180.3                          | .72  |
|                           | .76 to .86  | 149.1                                   | 120.0                          | .80  |
|                           | .87 to .95  | 100.1                                   | 94.2                           | .94  |
|                           | .97 to 1.47   | <u>29.0</u>                             | <u>32.7</u>                    | 1.13   |
| Sub-Total 250 Milliliters |   | 529.6                                   | 427.2                          | .81  |
| 375                       | (1)   | (1)                                     | (1)                            |  |
| Not Known                 | -   | -                                       | <u>198.6</u>                   |  |
| TOTAL, MARMALADES         |   |   | 819.5                          |  |
| TOTAL, JAMS & MARMALADES  |   |   | 4 482.6                        |  |

\* Aggregated in order to preserve confidentiality of Canadian importers  
(1) Confidential included in total

APPENDIX D

CANADIAN IMPORTERS

Consignees or importers of jams and marmalades during the period July to December 1987 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>      |
|--|---------------------|
| A. Bertozzi Importing Inc.                                       | Rexdale, Ont.       |
| Aliments Heritage Inc.   | Westmount, Qué.     |
| Allied Food Distributors Inc.                                    | Montréal, Qué.      |
| Amco Food Brokers Ltd.   | Dartmouth, N.S.     |
| Amisam Inc.  | Montréal, Qué.      |
| Archibald Brokerage Ltd.   | Surrey, B.C.        |
| Ariston Importing Co. Ltd.                                       | Scarborough, Ont.   |
| Arthur Roger & Associates Inc.                                   | Montréal, Qué.      |
| Basant Canada Ltd.   | Toronto, Ont.       |
| Bueno Brothers Supermarket Ltd.                                  | Winnipeg, Man.      |
| C.R.S. Workers Co-operative Ltd.                                 | Vancouver, B.C.     |
| Danamar Imports Ltd.   | Markham, Ont.       |
| Danish Canadian Bakery and Deli Ltd.                             | Calgary, Alta.      |
| David Ashley and Company   | Mississauga, Ont.   |
| Distribution AGP/Orion Inc.                                      | Montréal, Qué.      |
| Elco Fine Foods Inc.   | Richmond Hill, Ont. |
| Eurotrade Import Export Inc.                                     | Mississauga, Ont.   |
| Fahn Products & Co. Ltd.   | Toronto, Ont.       |
| Far-Met Importers Ltd.   | Vancouver, B.C.     |
| Finica Food Special Ltd.   | Agincourt, Ont.     |
| Flavourex Ind. (Canada) Ltd.                                     | Downsview, Ont.     |
| G & R Import Export Corp. Ltd.                                   | Toronto, Ont.       |
| Goods Trading Company Ltd.                                       | Don Mills, Ont.     |
| Grace, Kennedy (Ont.) Inc.                                       | Richmond Hill, Ont. |
| Grand Specialties Ltd.   | Toronto, Ont.       |
| Grant Atkinson & Blair Ltd.                                      | Surrey, B.C.        |
| Holtzheuser Brothers Ltd.  | Toronto, Ont.       |
| I.D. Foods Corporation:  | Rexdale, Ont.       |
|  | Laval, Qué.         |
|  | Laval, Qué.         |
| Import-Export Haif Reg'd   |                     |
| Intersave Buying & Merchandise, Division of Loblaw's<br>Co. Ltd. | Toronto, Ont.       |
| J.E. Hastings Ltd.   | Moncton, N.B.       |
| Jentash Marketing Ltd.   | Vancouver, B.C.     |
| K.J. Preiswerck Ltd.   | Coquitlam, B.C.     |
| Koffman Foods Ltd.   | Richmond, B.C.      |
| Kouri Foods Inc.   | Laval, Qué.         |
| Kraft Ltd.   | Montréal, Qué.      |
| Latek Export-Import Inc.   | Vancouver, B.C.     |
| Leader Food & Nut Importers Ltd.                                 | Scarborough, Ont.   |
| Lifesource Natural Foods Ltd.                                    | Markham, Ont.       |



CANADIAN IMPORTERS (CONT'D)

| <u>Name</u>  | <u>Address</u>     |
|--|--------------------|
| MacLaren Wright Company Ltd.                           | Scarborough, Ont.  |
| Marks & Spencer Canada Inc.                            | Mississauga, Ont.  |
| McCallum Sales Ltd.                                    | Vancouver, B.C.    |
| Miloni Food Importers Ltd.                             | Burnaby, B.C.      |
| National Importers (Canada) Ltd.:                      | Brampton, Ont.     |
|  | Vancouver, B.C.    |
|  | Vancouver, B.C.    |
| Nel Sadry Management Services Ltd.                     | Montréal, Qué.     |
| Novek Distributors Ltd.                                | Toronto, Ont.      |
| Ontario Federation of Food Co-ops and Clubs Inc.       | Coquitlam, B.C.    |
| Pactra Enterprises Ltd.                                | Weston, Ont.       |
| Pantry Shelf Co.                                       | Montréal, Qué.     |
| Phoenician Adonis Impex Ltée                           | Mississauga, Ont.  |
| Quality House Marketing Inc.                           | St-Laurent, Qué.   |
| Robert Lapointe et Jean Lacroix                        | Saint Jérôme, Qué. |
| Roger Hammer Ltd.                                      | Concord, Ont.      |
| S and F Food Importers Ltd.                            | Toronto, Ont.      |
| Sable & Rosenfeld Foods Ltd.                           | Vancouver, B.C.    |
| Saftcan International (Canada) Ltd.                    | Toronto, Ont.      |
| Scantrade Int'l Ltd.                                   | Saskatoon, Sask.   |
| Shelley Western Ltd.                                   | Montréal, Qué.     |
| Simon Import Ltd.                                      | Downsview, Ont.    |
| Sweet Expressions Food Inc.                            | Weston, Ont.       |
| The T. Eaton Company Ltd.                              | Markham, Ont.      |
| Wade Ryan's Sales Division, Crombie Kennedy Sales Ltd. | Richmond, B.C.     |
| Western Foods Ltd.                                     | Winnipeg, Man.     |
| Westrade Sales Ltd.:                                   | Vancouver, B.C.    |
|  | Chelsea, Qué.      |
| Westruther Holdings Ltd.                               | St. John's, Nfld.  |
| Windsor Agencies Ltd.                                  | Richmond, B.C.     |
| YHS Trading (Canada) Ltd.                              |                    |

FOREIGN EXPORTERS TO CANADA

There were a total of 61 exporters to Canada of jams and marmalades during the period July to December 1987. The principal thirty are listed below in descending order of dollar value. These exporters accounted for \$4.2 million or 94 per cent of the value of imports analysed.

| <u>Name</u>                      | <u>Address</u>     |                 | <u>Value of Imports</u><br>(\$000) |
|----------------------------------|--------------------|-----------------|------------------------------------|
| Robertson Foods Int'l Ltd.       | Manchester         | England         | 548                                |
| Vendelbo Konserveres A/S         |                    | Denmark         | 866                                |
| Nelsons of Aintree Ltd.          | Liverpool          | England         |                                    |
| "Voce" Export Import Ltd.        | Zagreb             | Yugoslavia      | 549                                |
| Foreign Trade Enterprise         |                    |                 |                                    |
| Agros Ltd.                       | Warsaw             | Poland          |                                    |
| Jadran Export Import Ltd.        |                    | Yugoslavia      | 549                                |
| Podravka Ltd.                    |                    | Yugoslavia      |                                    |
| Favols S.A.                      |                    | France          |                                    |
| R. & W. Scott Ltd.               |                    | Scotland        | 274                                |
| Materne Conflux S.A.             |                    | Belgium         |                                    |
| C.S. Laird Ltd.                  | County Leitrim     | Ireland         | 248                                |
| Bulgar Plodexport Ltd.           |                    | Bulgaria        |                                    |
| Adriacommerce Export Import Ltd. |                    | Yugoslavia      | 343                                |
| Hero Conserven Ltd.              | Lenzburg           | Switzerland     |                                    |
| S.A. Andros                      |                    | France          |                                    |
| Baxters of Speyside Ltd.         | Moray              | Scotland        | 273                                |
| Wilkin & Sons Ltd.               | Essex              | England         |                                    |
| The J.M. Smucker Co. Ltd.        | Salinas, CA        | United States   |                                    |
| The Dickinson Family Ltd.        | Salinas, CA        | United States   | 237                                |
| Kemikalija Oour                  | Omnikem            | Yugoslavia      |                                    |
| Boin Confiture                   |                    | France          |                                    |
| Kon Mi J de Betuwe B.V.          |                    | Holland         | 174                                |
| Marks & Spencer Ltd.             | London             | England         |                                    |
| M. Polaner Inc.                  | Newark, N.J.       | United States   |                                    |
| Hilgona A.G.                     | Liechtenstein      | Switzerland     | 86                                 |
| Kraft Rosenblum                  | North Bergen, N.J. | United States   |                                    |
| American Foods Corp.             | San Francisco, CA  | United States   |                                    |
| S.P.C. Limited                   | Shepparton         | Australia       | 61                                 |
| Calve de Betuwe b.v.             |                    | The Netherlands |                                    |
| Allied Old English Inc.          | Port Reading, N.J. | United States   |                                    |

\* Aggregated to preserve confidentiality of Canadian importers.

CANADIAN SUPPLIERS

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 Regional Industrial Expansion (DRIE) 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 within the following Canadian International Trade Classification (C.I.T.C.) commodity codes.

078-92-20 Jams, Canned, Except Infant Foods

| <u>Name</u>                               | <u>Address</u>             |
|---|----------------------------|
| Canada Packers Inc.                       | Toronto, Ont.              |
| Catelli Inc.                              | Montréal, Qué.             |
| Catelli Ltd/Ltée                          | Montréal, Qué.             |
| Culinar Inc. Groupe Patisserie et C.P.    | Beauce, Qué.               |
| * E.D. Smith & Sons Limited               | Winona, Ont.               |
| Eleanor's Kitchen                         | Moffat, Ont.               |
| * Fraser Valley Foods Ltd.                | Sardis, B.C.               |
| General Foods, Div. of Phillip Morris     | Lasalle, Qué.              |
| Gibbons Foods, Div. of Eden Mfg. Co. Ltd. | Toronto, Ont.              |
| * Golden Valley Processors Inc.           | Abbotsford, B.C.           |
| H. Cantin Limitée                         | Beauport, Qué.             |
| Lazy K Products Limited                   | Blairmore, Alta.           |
| Les Conserves des Laurentides Ltée        | Ste-Anne-des-Plaines, Qué. |
| Marsan Foods Limited                      | Scarborough, Ont.          |
| Olinda Foods Inc.                         | Ruthven, Ont.              |
| * Produits Marco Ltée                     | Laval, Qué.                |
| Purity Factories Ltd.                     | St. John's, Nfld.          |
| Rose & Laflamme Co. Ltd.                  | Laprairie, Qué.            |
| * Sable & Rosenfeld Foods Limited         | Toronto, Ont.              |
| * Scotian Gold Co-operative Ltd.          | Kentville, N.S.            |
| Select Food Products Limited              | Toronto, Ont.              |
| Stacey Brothers, Div. of Ault Foods Ltd.  | Mitchell, Ont.             |
| Sugar Nest Inc.                           | Gatineau, Qué.             |
| W.J. Lafave & Fils Ltée                   | St-Jérôme, Qué.            |
| W.T. Lynch Foods Limited                  | Don Mills, Ont.            |
| Wild Blueberry Assoc. of North America    | Fredericton, N.B.          |

\* Company engaged in export trade

BOSS (CONT'D)

078-94-10 Marmalades, Canned, Except Infant Foods

| <u>Name</u>   | <u>Address</u>   |
|---|--|
| * E.D. Smith & Sons Limited<br>Eleanor's Kitchen  | Winona, Ont.<br>Moffat, Ont.                                   |
| * Fraser Valley Foods Ltd.<br>Golden Valley Processors Inc.   | Sardis, B.C.<br>Abbotsford, B.C.                               |
| * Kellogg Salada Canada Inc.<br>Les Conserves des Laurentides Ltée<br>Produits Alimentaires McLean Ltée | Rexdale, Ont.<br>Ste-Anne-des-Plaines, Qué.<br>Laprairie, Qué. |
| * Sable & Rosenfeld Foods Limited<br>Stacey Brothers, Div. of Ault Foods Ltd.                           | Toronto, Ont.<br>Mitchell, Ont.                                |

\* Company engaged in export trade

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

Business Opportunities Sourcing System (ABOS)  
Department of Regional Industrial Expansion  
235 Queen Street  
Ottawa, Ontario K1A 0H5  
Tel: (613) 954-5031 - Telex: 053-4123

CANADIAN TRADE INDEX

Canadian companies are arranged in alphabetical order.

Jams

| <u>Name</u>                                   | <u>Address</u>                  |
|---|---------------------------------|
| Bowes Co. Ltd.                                | Islington, Ont.                 |
| Cadbury Schweppes Canada Inc., Motts Division | Rexdale, Ont.                   |
| Canada Packers Inc.                           | Toronto, Ont.                   |
| Cantin H. Ltée                                | Beauport, Qué.                  |
| * Catelli Canada                              | Weston, Ont.                    |
| Cobi-Foods Inc.                               | Port Williams, N.S.             |
| Culinar Inc., Groupe Pâtisserie et Confiserie | Ste-Marie, Qué.                 |
| Culinar Inc., Usine de Confiserie Vachon      | Ste-Marie, Qué.                 |
| * Empress Foods Ltd.                          | Vancouver, B.C.                 |
| Fraser Valley Foods                           | Sardis, B.C.                    |
| * Golden Valley Processors Inc.               | Abbotsford, B.C.                |
| Greaves Jams & Marmalades Ltd.                | Niagara-on-the-Lake, Ont.       |
| Groupepex Distribution Inc.                   | Montréal, Qué.                  |
| Kirkland & Rose Ltd.                          | Richmond, B.C.                  |
| * Kraft Limited/Limitée                       | Mount-Royal, Qué.               |
| Les Aliments Carrière Inc.                    | St-Denis-sur-le-Richelieu, Qué. |
| Les Conserves des Laurentides                 | Ste-Anne-des-Plaines, Qué.      |

CANADIAN TRADE INDEX (CONT'D)

Canadian companies are arranged in alphabetical order.

Jams

| <u>Name</u>                                | <u>Address</u>       |
|--|----------------------|
| Lynch, W.T., Foods Limited                 | Don Mills, Ont.      |
| * Marsan Foods Limited                     | Scarborough, Ont.    |
| McLean's Food Products Limited             | Laprairie, Qué.      |
| Purity Factories Limited                   | St. John's, Nfld.    |
| Robertson 1867 Farm, The                   | Dunsford, Ont.       |
| Scotian Gold Co-operative Limited          | Kentville, N.S.      |
| * Smith, E.D. & Sons Limited               | Winona, Ont.         |
| Spécialités de Boulangerie BHR (1986) Inc. | St-Chrysostome, Qué. |
| Stafford Foods Limited                     | Toronto, Ont.        |
| Summerland Sweets Limited                  | Summerland, B.C.     |
| * Turkey Hill Sugarbush Ltd.               | Brome, Qué.          |

Marmalades

| <u>Name</u>                              | <u>Address</u>             |
|--|----------------------------|
| Culinar Inc., Usine de Confiserie Vachon | Ste-Marie, Qué.            |
| * Empress Foods Ltd.                     | Vancouver, B.C.            |
| Greaves Jams & Marmalades Ltd.           | Niagara-on-the-Lake, Ont.  |
| Kellogg Salada Canada Inc.               | Rexdale, Ont.              |
| * Kraft Limited/Limitée                  | Mount-Royal, Qué.          |
| Les Conserves des Laurentides            | Ste-Anne-des-Plaines, Qué. |
| Robertson 1867 Farm, The                 | Dunsford, Ont.             |
| * Smith, E.D. & Sons Limited             | Winona, Ont.               |
| Stafford Foods Limited                   | Toronto, Ont.              |

\* Indicates firms 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

APPENDIX G

CANADIAN AND FOREIGN TARIFFS

Jams and marmalades included in this analysis were dutiable under the following most commonly applied tariff items.

| Tariff<br>Item | Description   | Tariff Treatment                       |                                      |                   |  |                     |
|----------------|---|--|--------------------------------------|-------------------|--|---------------------|
|                |   | British<br>Prefer-<br>ential<br>Tariff | Most<br>Favoured<br>Nation<br>Tariff | General<br>Tariff | General<br>Prefer-<br>ential<br>Tariff | U.K. and<br>Ireland |
|                |   | %                                      | %                                    | %                 | %                                      | %                   |
| 10530-1        | Jellies, jams, marmalades, preserves, fruit butters and condensed mincemeat: n.o.p. | 7.5                                    | 10                                   | 15                | -                                      | 10                  |
| 10531-1        | Strawberry jams, whether or not containing pectin                                   | 12.5                                   | 15                                   | 20                | -                                      | 15                  |

N.o.p. - Not otherwise provided for

Tariff Arrangements and Foreign Countries of Export:

Exporting countries which qualify for the Most Favoured Nation tariff treatment: Austria, Belgium, Denmark, Federal Republic of Germany, France, Greece, Hungary, Italy, Poland, The Netherlands, Switzerland, United States

Exporting countries which qualify for the Most Favoured Nation tariff treatment or General System of Preference tariff treatment\*: Bulgaria, Lebanon, Philippines, Turkey and Yugoslavia.

Exporting countries which qualify for the Most Favoured Nation tariff treatment or British Preferential System tariff treatment\*: Australia, Jamaica, Malaysia, Pakistan, Singapore, Trinidad and Tobago.

Exporting countries which qualify for the Most Favoured Nation tariff treatment or U.K. and Ireland tariff treatment: Ireland, United Kingdom

\* NOTE: In order to qualify for the General System of Preference, a special certificate of origin is required.

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) 954-6947

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

ACCURACY OF RESULTS DUE TO SAMPLING

Since some of the documents were selected using random sampling, figures in the tables do not correspond exactly to the results which would have been obtained if all documents had been examined.

The following summary shows the probable range of error for various values shown in this report. In most cases (approximately two thirds or more), the true results will be within plus or minus one relative standard error of the values shown in this summary. Only in rare cases (about one in twenty), will the true value be more than two relative standard errors from the value in this report.

| <u>Item</u>                 | <u>Value Shown<br/>in Table</u><br>(\$000) | <u>Approx. Standard<br/>Error</u><br>(\$000) | <u>Approx. Relative<br/>Std. Error (CV)</u><br>% |
|-----------------------------|--|--|--|
| Total Imports               | 4 483                                      | 17.5   | .39  |
| <u>Jams - Flavour</u>       |  |  |  |
| Strawberry                  | 1 106                                      | 31.3   | 2.8  |
| Raspberry                   | 746  | 12.1   | 1.6  |
| Apricot                     | 298  | 3.9  | 1.3  |
| Currant, Black              | 275  | 11.1   | 4.0  |
| Cherry                      | 83   | 4.9  | 5.8  |
| Blackberry                  | 162  | 9.3  | 5.7  |
| Peach                       | 73   | 1.4  | 1.9  |
| Orange                      | 57   | 1.2  | 2.0  |
| Plum                        | 56   | 2.6  | 4.6  |
| <u>Marmalades - Flavour</u> |  |  |  |
| Ginger                      | 177  | 9.2  | 5.2  |
| Orange                      | 114.                                       | 14.2   | 12.5   |
| Orange, Thick Cut           | 71   | .0   | .0   |
| Golden Shred                | 67   | .0   | .0   |
| <u>Countries of Origin</u>  |  |  |  |
| Yugoslavia                  | 907  | 15.6   | 1.7  |
| United Kingdom              | 1 326                                      | 22.9   | 1.7  |
| Denmark                     | 557  | .0   | .0   |
| France                      | 350  | 13.2   | 3.8  |
| Poland                      | 248  | 16.3   | 6.6  |
| United States               | 328  | 22.6   | 6.8  |
| <u>Jar Size (ml)</u>        |  |  |  |
| 250                         | 867  | 23.4   | 2.7  |
| 375                         | 708  | 12.3   | 1.7  |
| 750                         | 544  | 12.8   | 2.4  |

Accuracy of Results Due to Sampling (Cont'd)

For these and Other Values in this Report:

| <u>Value Range (\$)</u> | <u>No. of Values<br/>in Value Range</u> | <u>Coefficients of Variation (CV's) %</u> |                           |               |                           |                       |
|-------------------------|---|---|---------------------------|---------------|---------------------------|-----------------------|
|                         |   | <u>Smallest<br/>CV</u>                    | <u>Lower<br/>Quartile</u> | <u>Median</u> | <u>Upper<br/>Quartile</u> | <u>Largest<br/>CV</u> |
| 2,000,001 to 5 million  | 1                                       | -   | -                         | .4            | -                         | -                     |
| 1,000,001 to 2 million  | 2                                       | 1.7                                       | -                         | -             | -                         | 2.8                   |
| 500,001 to 1 million    | 7                                       | .0  | 1.7                       | 1.7           | 2.5                       | 2.7                   |
| 200,001 to 500,000      | 10                                      | 1.3                                       | 3.0                       | 3.9           | 4.9                       | 6.9                   |
| 100,001 to 200,000      | 17                                      | .0  | .0                        | 5.7           | 9.7                       | 13.3                  |
| 50,001 to 100,000       | 27                                      | .0  | .0                        | .0            | 3.7                       | 20.2                  |
| 20,001 to 50,000        | 41                                      | .0  | .0                        | .0            | 8.3                       | 47.9                  |
| 10,001 to 20,000        | 29                                      | .0  | .0                        | .0            | 16.2                      | 94.3                  |
| 5,001 to 10,000         | 49                                      | .0  | .0                        | .0            | 64.6                      | 94.3                  |



