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IMPORT ANALYSIS

Market Research Support

POLYESTER FILM (DRAFTING AND SENSITIZED)

OCTOBER, NOVEMBER AND DECEMBER 1987

Pub. No.: 88014-PM November 1988



Government
of Canada

Regional Industrial
Expansion

Gouvernement
du Canada

Expansion industrielle
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POLYESTER FILM (DRAFTING AND SENSITIZED)

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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

FOR MORE INFORMATION PLEASE CONTACT:

Market Information and Analysis Division
Market Development Branch
Department of Regional Industrial Expansion
235 Queen Street
Ottawa, Ontario
K1A 0H5
Tel: (613) 954-4970

OR
Plastics, Rubber and Chemical Specialties
Division
Resource Processing Industries Branch
Department of Regional Industrial Expansion
235 Queen Street
Ottawa, Ontario
K1A 0H5
Tel: (613) 954-3015

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IMPORT ANALYSIS

POLYESTER FILM

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 drafting and sensitized polyester film is based on a detailed examination of Revenue Canada Customs import documents for the period October, November and December, 1987. The following Canadian International Trade Classification (C.I.T.C.) import commodity code was analysed:

424-13-20 Polyester film, 0.01 inches or less in thickness.

Import statistics, for the above mentioned import commodity code for the period analyzed amounted to \$18.9 Million. For the purpose of this analysis, only those shipments described as drafting or sensitized polyester film were studied. These shipments amounted to \$858,000.

II. ANALYSIS OF IMPORTS

During the months of October to December, 1987, total imports of drafting and sensitized polyester film, having a thickness of 0.01 inches or less, amounted to \$858 000.

Drafting type polyester film accounted for \$756 000 or 88 per cent of the total value.

SUMMARY OF IMPORTS
OCTOBER TO DECEMBER 1987

<u>A. TYPE, QUANTITY AND VALUE</u>	<u>QUANTITY</u>	<u>VALUE</u> <u>(\$000)</u>	<u>AVERAGE</u> <u>UNIT PRICE</u> <u>(\$)</u>
DRAFTING:	(NO.)		
SHEETS	2 081 120	327	.16/sheet
	(YARDS)		
ROLLS	354 453	417	1.18/yard
	-	12	
SUB TOTAL-DRAFTING, SHEETS AND ROLLS		<u>756</u>	
SENSITIZED:	(NO.)		
SHEETS	156 200	35	.22/sheet
	(YARDS)		
ROLLS	26 873	53	1.97/yard
	-	14	
SUB TOTAL-SENSITIZED, SHEETS AND ROLLS		<u>102</u>	
GRAND TOTAL-ALL TYPES		858	

B. TYPE, THICKNESS AND VALUE (\$000)

The .003 thickness dominated Roll film imports. This thickness was also important in Sheet film, but its total share could not be ascertained.

<u>TYPE</u>	<u>THICKNESS</u> <u>(inches)</u>	<u>DRAFTING</u> <u>(\$000)</u>	<u>SENSITIZED</u> <u>(\$000)</u>	<u>TOTAL</u> <u>(\$000)</u>
Sheets	.003	47.9	14.2	62.1
	Not Known	<u>278.8</u>	<u>21.0</u>	<u>299.8</u>
	Total Sheets	326.7	35.2	361.9
Rolls	.003	248.8	45.8	294.6
	Other	104.9	7.3	112.2
	Not Known	<u>75.4</u>	<u>13.8</u>	<u>89.2</u>
	Total Rolls	429.1	66.9	496.0
Total, Sheets and Rolls	.003	296.7	60.0	356.7
	Other &			
	Not Known	<u>459.1</u>	<u>42.1</u>	<u>501.2</u>
	Total Type	755.8	102.1	857.9

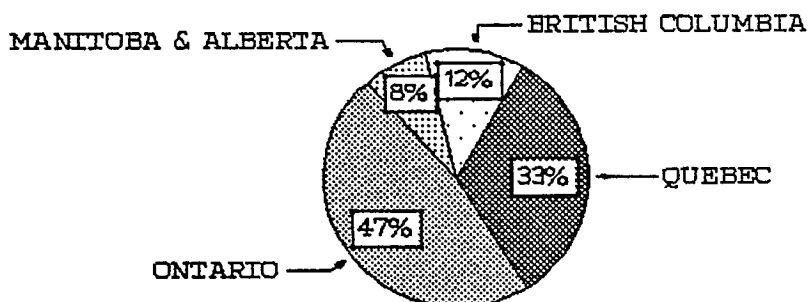
Further details, showing sizes and unit prices, are shown in Appendix A.

II. ANALYSIS OF IMPORTS (CONT'D)

The United States was the major country of export of drafting and sensitized polyester film included in this report. It accounted for over 90 per cent of the total dollar value. Other countries of export were The Netherlands and United Kingdom. Individual statistics are not shown for reasons of confidentiality of Canadian importers.

Ontario was the major province of consignee, accounting for 47 per cent of the total dollar value. It was followed by Quebec (33 per cent) and British Columbia (12 per cent).

PROVINCE OF CONSIGNEE



100% = \$858 000

II. ANALYSIS OF IMPORTS (CONT'D)

There were 22 known consignees/importers of drafting and sensitized polyester film during October, November and December, 1987. The principal six consignees/importers accounted for \$674,000 or 79 per cent of the total dollar value of imports. All consignees /importers are listed in alphabetical order in Appendix B.

IMPORT MARKET CONCENTRATION
OCTOBER TO DECEMBER 1987

<u>Principal</u> <u>Consignees/Importers</u> <u>(by value)</u>	<u>Cumulative</u> <u>Value</u> <u>(\$000)</u>	<u>Cumulative %</u> <u>of Total Value</u>
3	533	62
6	674	79
10	775	90
15	<u>839</u>	<u>98</u>
All Consignees/ Importers (22)	858	100

Apparently 57 per cent of the analyzed shipments were affiliated transactions, i.e. shipments between affiliated firms.

III CANADIAN PRODUCTION

Polyester film is not manufactured in Canada.

IMPORTS OF POLYESTER FILM
BY TYPE, SIZE AND AVERAGE UNIT PRICE
OCTOBER, NOVEMBER AND DECEMBER 1987

<u>TYPE OF FILM</u>	<u>THICKNESS</u> (inches)	<u>WIDTH</u> (inches)	<u>LENGTH</u> (inches)	<u>QUANTITY</u> (No. of Sheets)	<u>VALUE</u> (\$)	<u>AVERAGE</u> <u>UNIT PRICE</u> (\$)
DRAFTING						
SHEETS	.003	8.5	X 11)	240 000	33 534	.14
		8.5	X 14)*			
	.003	11	X 17	4 970	1 201	.24
	.003	15	X 24)	2 300	961	.42
		17	X 22)			
		17	X 24)*			
		18	X 24)			
	.003	22	X 34)	2 100	1 440	.69
		22	X 35.5)*			
	.003	23.3	X 33.11)	5 200	5 497	1.06
		24	X 36)*			
	.003	27.83	X 39.37)	4 400	5 272	1.20
		28	X 42)			
		33.125	X 46.75)			
		36	X 42)*			
		36	X 44)			
		36	X 48)			
	Not known	8.5	X 10.5	138 000	21 400	.16
	Not known	8.5	X 11)	1 674 200	250 210	.15
		8.5	X 14)*			
	Not known	11	X 17)	2 650	1 470	.55
		14	X 17)*			
		17	X 22)			
	Not known	18	X 24)	2 500	2 538	1.02
		19	X 24)			
		22	X 34)*			
		24	X 36)			
	Not known		Not known	<u>4 800</u>	<u>3 149</u>	<u>.66</u>
TOTAL - DRAFTING SHEETS				2 081 120	326 672	.16

* Aggregated in order to preserve confidentiality of Canadian Importers

IMPORTS OF POLYESTER FILM
BY TYPE, SIZE AND AVERAGE UNIT PRICE
OCTOBER, NOVEMBER AND DECEMBER 1987 - (CONT'D)

<u>TYPE OF FILM</u>	<u>THICKNESS</u> (inches)	<u>WIDTH</u> (inches)	<u>QUANTITY</u> (yards)	<u>VALUE</u> (\$)	<u>AVERAGE</u> <u>UNIT PRICE</u> (\$)
DRAFTING					
ROLLS					
	.002	31) 36)*	20 619	24 311	1.18
	.002	38) 42) 48)* 56)	17 593	26 601	1.51
	.003	24) 24.5)*	840	1 083	1.29
	.003	30	630	759	1.20
	.003	30.25) 30.5) 31.75)* 34.5)	5 952	7 778	1.31
	.003	36	76 753	76 782	1.07
	.003	36.25) 36.5) 37.75)* 38)	90 815	93 912	1.03
	.003	42	33 578	37 021	1.10
	.003	42.25) 42.5)* 43.75)	17 019	29 846	1.75
	.003	54	780	1 642	2.11
	.004	24) 36)*	14 146	20 633	1.46
	.004	37.75) 40) 42)* 43.75)	21 066	31 213	1.48

* Aggregated in order to preserve confidentiality of Canadian Importers

IMPORTS OF POLYESTER FILM
BY TYPE, SIZE AND AVERAGE UNIT PRICE
OCTOBER, NOVEMBER AND DECEMBER 1987 - (CONT'D)

<u>TYPE OF FILM</u>	<u>THICKNESS</u> (inches)	<u>WIDTH</u> (inches)	<u>QUANTITY</u> (yards)	<u>VALUE</u> (\$)	<u>AVERAGE</u> <u>UNIT PRICE</u> (\$)
DRAFTING					
ROLLS					
	.005	36) 42)*	1 409	2 175	1.54
	Not known	30) 36)*	36 523	33 972	.93
	Not known	37.75) 42)*	16 866	17 322	1.03
	Not known	43.75) 44) 48)* 54)	4 864	12 403	2.55
	Not known	Not known	-	<u>11 715</u>	-
TOTAL - DRAFTING ROLLS				<u>429 168</u>	
TOTAL - DRAFTING, ROLLS AND SHEETS				755 840	

* Aggregated in order to preserve confidentiality of Canadian Importers.

IMPORTS OF POLYESTER FILM
BY TYPE, SIZE AND AVERAGE UNIT PRICE
OCTOBER, NOVEMBER AND DECEMBER 1987 - (CONT'D)

<u>TYPE OF FILM</u>	<u>THICKNESS</u> (inches)	<u>WIDTH</u> (inches)	<u>LENGTH</u> (inches)	<u>QUANTITY</u> (No. of Sheets)	<u>VALUE</u> (\$)	<u>AVERAGE</u> <u>UNIT PRICE</u> (\$)
SENSITIZED						
SHEETS	.003	8.5	X 10.5)	10 600	1 676	.16
		8.5	X 11)			
		8.5	X 14)*			
		11	X 17)			
.003	.003	17	X 22)	4 600	3 847	.84
		22	X 34)*			
		22	X 36)			
.003	.003	23.39	X 33.11)	8 000	6 722	.84
		24	X 36)*			
.003	.003	27.83	X 39.37)	1 400	1 908	1.36
		30	X 42)*			
		33.11	X 46.61)			
Not Known	Not Known	8.5	X 10.5)	131 600	20 998	.16
		11	X 17)			
		17	X 22)*			
		23.39	X 33.11)			
		24.41	X 34.06)			
TOTAL - SENSITIZED SHEETS				156 200	35 151	.23

* Aggregated in order to preserve confidentiality of Canadian Importers

IMPORTS OF POLYESTER FILM
BY TYPE, SIZE AND AVERAGE UNIT PRICE
OCTOBER, NOVEMBER AND DECEMBER 1987 - (CONT'D)

<u>TYPE OF FILM</u>	<u>THICKNESS</u> (inches)	<u>WIDTH</u> (inches)	<u>QUANTITY</u> (yards)	<u>VALUE</u> (\$)	<u>AVERAGE</u> <u>UNIT PRICE</u> (\$)
SENSITIZED					
ROLLS	.002	30) 36)*	3 250	5 684	1.75
	.002	42	680	1 595	2.35
	.003	24	1 030	1 707	1.66
	.003	30	1 010	1 839	1.82
	.003	36	17 613	33 551	1.90
	.003	42) 54)*	3 290	8 699	2.64
	NOT KNOWN	36) 40) 42)* 44) 52)	-	13 797	
TOTAL - SENSITIZED ROLLS				<u>66 872</u>	
TOTAL - SENSITIZED, ROLLS AND SHEETS				<u>102 023</u>	
GRAND TOTAL - DRAFTING AND SENSITIZED				857 863	

* Aggregated in order to preserve confidentiality of Canadian Importers.

CANADIAN IMPORTERS

Consignees/importers of drafting and sensitized polyester film during October, November and 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>
ABSO Blue Prints Ltd.	Toronto, Ont.
ACME Film Corporation	Calgary, Alta.
AM International Inc.	Scarborough, Ont.
Arkcan Graphics Visuals Inc.	Pickering, Ont.
Can-Tech Industries Ltd.	Vancouver, B.C.
Canadian Drafting & Engineering Supplies Ltd.	Burnaby, B.C.
Carleton Drafting & Survey Supplies Ltd.	Concord, Ont.
Continental Converters Co.	Coquitlam, B.C.
Cosmex Graphics Inc.	Montréal, Qué.
Haida Stationers & Technical Products Ltd.	Burnaby, B.C.
Hughes Owens Inc.	Mississauga, Ont.
	St. Laurent, Qué.
James River Graphics Ltd.	Thornhill, Ont.
Keuffel & Esser of Canada Ltd.	Granby, Qué.
Lewis Instruments Ltd.	Winnipeg, Man.
Loomis & Toles Ltd.	Toronto, Ont.
Neville Crosby Inc.	Vancouver, B.C.
Sharps Audio Visual Ltd.	Calgary, Alta.
Tricom Business Equipment Co. Ltd.	Scarborough, Ont.
Trimen Blueprinting & Sales Ltd.	Surrey, B.C.
Vanca! Reproductions Group	Vancouver, B.C.
Western Diazo Coaters Ltd.	Calgary, Alta.
Western Technical Supply Co. Ltd.	Vancouver, B.C.

FOREIGN EXPORTERS TO CANADA

There were a total of 14 exporters to Canada of polyester film during the period October, November and December 1987. They are listed below in descending order of dollar value.

<u>Name</u>	<u>Address</u>	<u>Value of imports</u> <u>(\$000)</u>
Arkwright Inc.	Fiskeville, R.I., USA	335
James River Graphics Inc.	South Hadley, MA, USA)	292
Keuffel & Esser Co.	Millerton, N.Y., USA)*	
Precision Coatings Inc.	Walled Lake, MI, USA	75
Continental Converters	Santa Fe Springs, CA, USA)	80
Teledyne Post	Troy, MI, USA)*	
	Seattle, WA, USA)	
AM Admel Ltd.	Hemel, Hempstead, UK)	70
O.C.E. Nederland BV	Venlo, The Netherlands)	
Phomat Reprographics Inc.	Madison Heights, MI, USA)*	
Rayven Inc.	St-Paul, MN, USA)	
Dietzgen Corp.	Des Plaines, IL, USA)	
Ulano International (VI Inc.)	Brooklyn, N.Y., USA)	6
Drafting Graphics Inc.	Elk Grove, IL, USA)*	
Borden & Riley Paper Co.	Hollis, N.Y., USA)	
TOTAL		858

* 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 Manufacturer's 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.) import commodity code.

424-13-20 Polyester Film, 0.01 Inches or less in thickness

(Note: This code includes polyester film other than drafting or sensitized).

<u>Name</u>	<u>Address</u>
Western Diazo Coaters Ltd.	Calgary, Alta.

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.

Film, transparent, polypropylene, polyester and polyesthylene. This list also includes plastic film, unsupported.

<u>Name</u>	<u>Address</u>
3M Canada Inc.	London, Ont.
Abitibi-Price Inc.	Toronto, Ont.
* Alcan Canada Rolls, Division of Aluminum Company of Canada Ltd.	Scarborough, Ont.
Allied Halo Industries Inc.	Scarborough, Ont.
Allied Pioneer Industries Ltd.	Winnipeg, Man.
Apache Plastics Ltd.	Burlington, Ont.
Arrow Plastics (Div. of 569471 Ont. Inc.)	Scarborough, Ont.

CANADIAN TRADE INDEX (CONT'D)

<u>Name</u>	<u>Address</u>
* BCL Canada, Division International Paints (Canada) Ltd.	Cornwall, Ont.
Balcan Plastics Ltd.	St-Leonard, Que.
Big M Plastics Ltd	Lethbridge, Alta.
Borden Chemical Division of the Borden Company Ltd.	West Hill, Ont.
* C-I-L Inc.	North York, Ont.
* Campbell Films Ltd.	Orillia, Ont.
* Canadian General-Tower Ltd.	Cambridge, Ont.
Canadian Technical Tape Ltd.	Montreal, Que.
Chempac Powder Division of CCL Industries Inc.	Toronto, Ont.
Cinran Plastics Inc.	London, Ont.
Coastal Plastics Ltd.	Dartmouth, N.S.
Condor Laminations	Agincourt, Ont.
Cryovac Division W.R. Grace & Co of Canada Ltd	Mississauga, Ont.
DeLuxe Paper Products Ltd.	Montreal, Que.
Diverse Blending Ltd.	Orillia, Ont.
Dominion Tape of Canada Ltd.	Cornwall, Ont.
* DuPont Canada Inc.	Mississauga, Ont.
Ellehammer Industries	Sidney, B.C.
GBC Canada Inc.	Don Mills, Ont.
Goodyear Canada Inc., Plastic Films Division	Islington, Ont.
Graphic Flexible Packaging Ltd.	Orangeville, Ont.
Hercules Canada Inc.	Mississauga, Ont.
Hoechst Canada Inc.	Montreal, Que.
Hymopack Ltd.	Toronto, Ont.
Jerlee Inc.	Concord, Ont.
Lawson Flexible Packaging	Weston, Ont.
Layfield Plastics (1978) Ltd.	Concord, Ont.
Lucky Plastic Products Factory Ltd.	Scarborough, Ont.
* M&R Plastics Inc.	Fabreville, Que.
Magic Foil Ltd.	Agincourt, Ont.
Medallion Plastics Ltd.	Burlington, Ont.
Mobil Chemical Canada Ltd., Plastics and Films Div.	Belleville, Ont.
Modern Wrappings Ltd.	Rexdale, Ont.
* Multipak Ltd.	Montreal, Que.

CANADIAN TRADE INDEX (CONT'D)

<u>Name</u>	<u>Address</u>
Nor Baker Industries Limited Plastics Division	Newmarket, Ont.
Northern Plastics Ltd.	Markham, Ont.
Peel Plastic Products Ltd.	Brampton, Ont.
* Plastalene Corporation	Granby, Que.
Plastics Canada Division of Hetman Canada Ltd.	Toronto, Ont.
* Poly-Cello, Div. of EPC Industries Ltd.	Amherst, N.S.
Polyson Polyesthylene Products 1986 Ltd.	Scarborough, Ont.
* Progressive Packaging Ltd.	Aurora, Ont.
Ralston, W. (Canada) Inc.	Montreal, Que.
Regency Plastics Company Ltd.	Downsview, Ont.
Reynolds Aluminum Company of Canada Ltd.	Etobicoke, Ont.
Roll-O-Sheets Canada Ltd.	Barrie, Ont.
Smith Packaging Ltd.	Mississauga, Ont.
Somerville Belkin Industries Ltd.	Surrey, B.C.
Tecsyn International Inc.	St Catharines, Ont.
Transilwrap of Canada Ltd.	Scarborough, Ont.
Union Carbide Canada Ltd.	Toronto, Ont.
Western Concord Manufacturing Ltd.	New Westminster, B.C.
Winpak Ltd.	Winnipeg, Man.

* Indicates firms engaged in export trade

Any enquiries and/or comments regarding the Canadian Trade Index list should be directed to:

The Canadian Manufacturer's Association
One Yonge Street
Toronto, Ontario
M5E 1J9
Tel: (416) 363-7261 - Telex: 065-24693

CANADIAN AND FOREIGN TARIFFS

Drafting and sensitized polyester film included in this analysis were dutiable under the following most commonly applied tariff items.

Tariff Item	Description	Tariff Treatment					
		British Preferential Tariff %	Most Favoured Nation Tariff %	General Tariff %	General Preferential Tariff %	U.K. and Ireland %	
18702-1	Films which otherwise would be classified under Tariff item 18700-1 on and after January 1, 1987	1986	Free	11.1	30	Free	10.2
		1987	Free	10.2	30	Free	10.2
	Plates, sheets, film, sheeting, strip; lay-flat or other tubing, blocks, bars, rods, sticks, non-textile monofilament and other profile shapes imported in lengths, all produced in uniform cross-section:						
93901-81	Other than the following on and after January 1, 1987	1986	14	14	25	9	14
		1987	13.5	13.5	25	9	13.5
	Epoxies; Polyamides; Silicones; Unsaturated polyesters;						
	Urea-formaldehydes on and after January 1, 1987	1986	14	14	-	6.5	14
		1987	13.5	13.5	-	6.5	13.5
	Melamine-formaldehydes; Phenol-formaldehydes						
	Polyurethanes on and after January 1, 1987	1986	14	14	-	9	14
		1987	13.5	13.5	-	9	13.5
	Polycarbonate plates, sheets, film, sheeting and strip, not less than 0.03 inch and not more than 0.50 inch in thickness						
		1986	10	10	-	6.5	10
		1987	10	10	-	6.5	10

CANADIAN AND FOREIGN TARIFFS - (CONT'D)

Tariff Item	Description	Tariff Treatment				
		British Prefer- ential Tariff %	Most Favoured Nation Tariff %	General Tariff %	General Prefer- ential Tariff %	U.K. and Ireland %
	Polyethylene terephthalate film, less than 6 inches in width	1986 7.5%	7.5%	-	5%	7.5%
		1987 7.5%	7.5%	-	5%	7.5%
	All other goods	1986 Free	Free	-	Free	Free
		1987 Free	Free	-	Free	Free

TARIFFS ARRANGEMENTS AND FOREIGN COUNTRIES OF EXPORT:

Exporting countries which qualify for the most favoured nation tariff treatment: United States and the Netherlands.

Exporting country which qualifies for the most favoured Nation tariff treatment or U.K. and Ireland tariff treatment: United Kingdom.

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) 954-6908

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

