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A REVIEW OF THE TOY AND GAME INDUSTRY IN CANADA



³ Chemicals Branch

² Departments of Industry and Trade and Commerce

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¹ Canada

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1. INTRODUCTION

INTRODUCTION

This report reviews the Canadian toy and game industry, primarily as it is defined in Dominion Bureau of Statistics Catalogue No. 47-204 "Sporting Goods and Toy Industry".

As defined in the D.B.S. Standard Industrial Classification 3931, the Toy industry is classified into three major groups. The first major group is identified as toys and games, comprising a wide range of toys, games, puzzles and carnival articles. The second major group of products comprises dolls, doll carriages, and doll furnishings and clothing. The third major group includes children's vehicles such as bicycles (with wheels under 14" in diameter), tricycles, sleighs, toboggans, scooters and coasters.

Not included in the D.B.S. report, however, are Christmas decorations, artificial Christmas trees, school bags, stationery and home playground equipment.

The implementation of a revised Standard Industrial Classification and a new Establishment concept in 1960 by the D.B.S. had negligible effect on the continuity of the statistical series applicable to the Toy and Game Industry. Accordingly, statistical series spanning 1960 in this report are regarded as being representative of the trends examined.

The industry's situation is examined on a selected statistical basis and comparisons are made with the United States toy and game industry and with an average of all manufacturing industries in Canada. The report describes the general circumstances of the industry and will, it is hoped, assist companies engaged in the manufacture of toys and games to recognize areas where more information is required if a comprehensive appraisal is to be achieved.

DEFINITION OF TERMS

Terms such as "Establishments", "Own Manufacture", "Total Activity", etc. used in this report have the same meaning as explained in D.B.S. Catalogue No. 47-204 and are briefly described here for ready reference. However for a detailed explanation of the individual terms the D.B.S. Catalogue should be consulted.

Establishment: A manufacturing establishment is typically a factory, mill or plant principally engaged in manufacturing activities and is a separate operating entity capable of reporting the following principal statistics: materials and supplies used, goods purchased for resale as such, fuel and power consumed, number of employees and man-hours worked and paid, salaries and wages, inventories, and shipments or sales.

Shipments, own manufacture: These figures represent shipments of goods made from own materials either in the reporting establishments or by other manufacturers on the basis of a charge to the reporting establishments for work done.

Shipments, non-manufacturing activities and other revenue: These figures represent value at establishments of all products or materials sold as such in the same condition as purchased or received for transfers, sales of consignment goods from other countries, and other operating revenue such as from sale of used fixed assets and materials, employee cafeteria operations, research and development work, etc. These figures do not, however, include non-operating revenue such as rent, dividends, interest, etc.

Shipments, total activity: These figures consist of the total of shipments of own manufacture, and shipments from non-manufacturing activities and other revenue.

Shipments of toys and games from all industries: These figures include shipments of toys and games not only from those establishments which manufacture toys and games primarily and which are therefore classified to the toy and game industry, but also from other industries which manufacture toys and games only as a secondary activity.

Value added, own manufacture: These figures are reached by deducting the cost of manufacturing materials, supplies, etc. and fuel and electricity consumed from the value of shipments of goods of own manufacture adjusted for changes in the value of inventories of finished goods and goods in process.

Value added, total activity: These figures comprise the total of value added by manufacturing activities and value added by non-manufacturing activities.

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2. PROFILE OF THE INDUSTRY AND FUTURE TRENDS

PROFILE OF THE INDUSTRY AND FUTURE TRENDS

Since the Second World War, the toy and game industry has grown impressively, the most notable expansion occurring in the last dozen years.

A. PRODUCTION AND EMPLOYMENT

The toy and game industry in Canada is small in comparison with many other industries. Its value of production amounts to less than 0.2 per cent of the figure for all manufacturing industries in Canada. In 1965 the industry employed 3,567 and shipped manufactured goods valued at \$43.9 million. When non-manufacturing revenues are included, the industry's total activity shipments amounted to nearly \$50 million.

In 1965 there were 81 companies in the industry. Of these, 15 companies, each with annual shipments of over \$1 million, accounted for 67 per cent of the industry's output. Ninety-nine per cent of the industry's output originated in Ontario and Quebec.

The period between 1954 and 1965 was one of exceptionally rapid growth in the toy and game industry in Canada. In this interval, employment increased by 166 per cent, and manufacturing by 313 per cent. If this rate of growth should continue, production would reach approximately \$150 million in 1975.

The industry is characterized by wide seasonal fluctuations in production and employment but is most active in the last half of each year.

B. PRODUCTIVITY AND OPERATING RATIOS

Productivity in the Canadian toy and game industry, measured in terms of production per production worker, production per man-hour paid or shipments per employee, is in the range of 25 to 37 per cent less than in the United States toy and game industry.

Between 1954 and 1965, the increase of productivity in the industry in the United States was greater than in Canada. Although most of the Canadian industry's productivity ratios displayed a noticeable relative improvement in the period 1961-1965, the gap in the productivities of the two countries has in general, widened.

C. MARKETS

The total domestic market for toys and games, calculated from the sum of all domestic shipments and imports, less exports, was \$75 million in 1965. The average annual rate of growth since 1954 has been 10 per cent, which, if continued, would bring the total market for toys and games in Canada to approximately \$200 million by 1975.

Exports of Canadian-made toys and games advanced from the 1954 value of \$200,000 to the 1965 value of \$3.2 million, which was 6 per cent of domestic output.

Imports were \$9.3 million in 1954, and \$23.9 million in 1965, tending to remain in the range of 30 to 35 per cent of the total market in the period 1954-1965.

The per capita domestic market of toys and games in Canada in 1965 was \$3.81. The average annual rate of growth in this ratio in the period 1954-1965 was 7.25 per cent. If this rate continues, the per capita domestic market in 1975 will be twice as high, at \$7.65.

D. TARIFFS

As a result of the Kennedy Round meetings of nations subscribing to the General Agreement on Tariffs and Trade, which were completed in late 1967, Canada made concessions in its rates of duty on a number of toy and game items. Under these concessions, progressive annual cuts will be made until by January 1, 1972, duty rates on the products included in the Agreement will be in the range of four-fifths to two-thirds of 1967 levels.

At the same time, other GATT nations agreed to significant reductions in their toy and game tariffs. As a result, Canadian manufacturers of toys and games, in common with manufacturers in other GATT countries, should find important new market opportunities open.

E. LABOR

Female labor constitutes more than 60 per cent of the work force in the toy and game industry.

Employment is highly seasonal, the first six months of the year being months of lowest employment. A degree of inefficiency seems to be inherent in this situation, as skilled help must be retained, though underutilized during the slow season.

F. TECHNOLOGY AND INNOVATION

The toy and game industry, by and large, does not seem to require the degree of expertise that more technically-oriented industries require. Nevertheless the intense competition of new ideas in this industry calls for a high adaptability to change and to new product development. It appears that little scientific research or development is carried out in Canada. However, products made under licence are common, and subsidiaries of large foreign-based corporations usually have access to developments originating in the facilities of the parent companies.

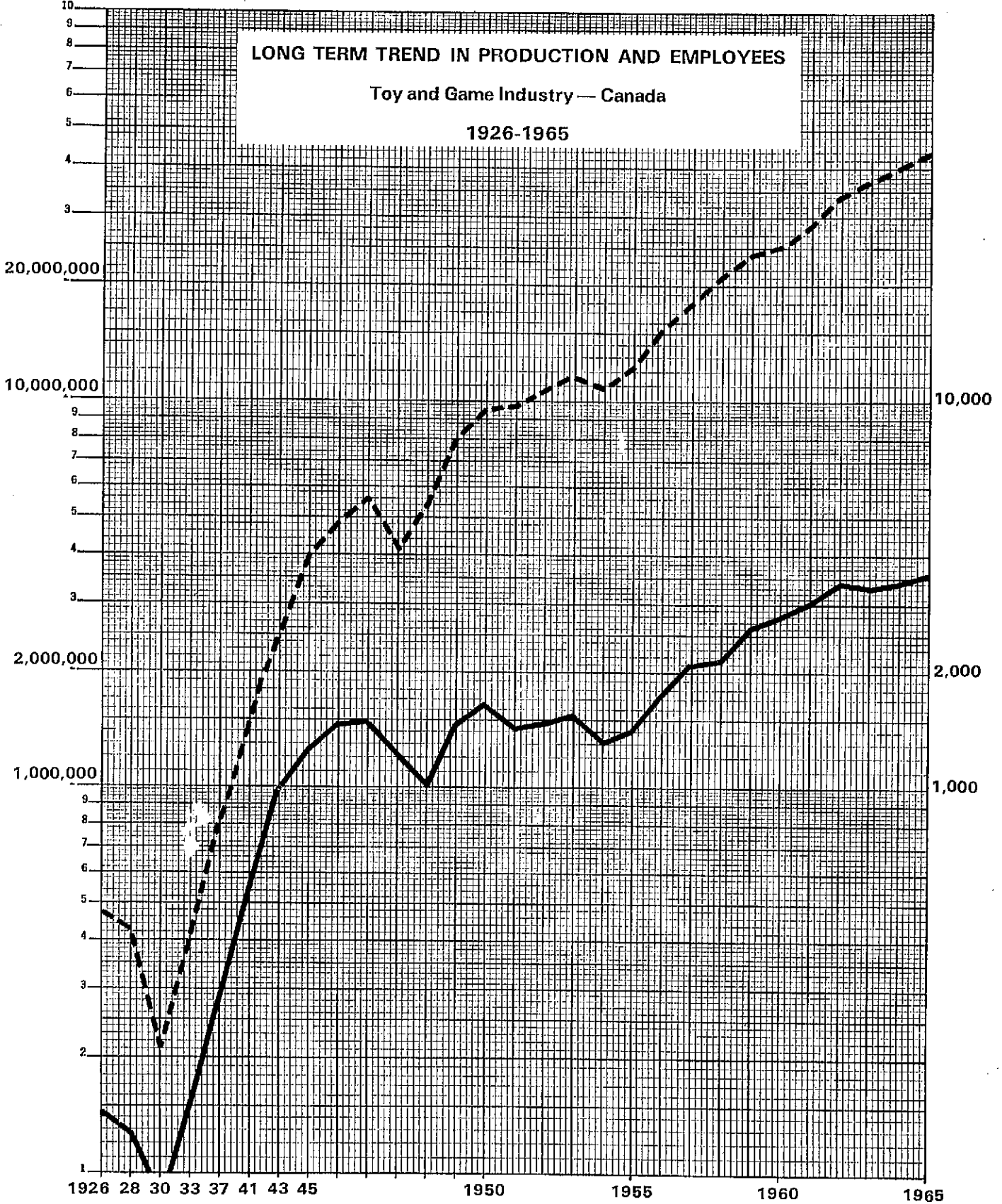
3. HISTORICAL REVIEW OF THE INDUSTRY

Production Scale

CHART 1

Employee Scale

\$100,000,000



--- Production
— Employees

A. EARLY HISTORY OF THE INDUSTRY

Production value of toys and games in Canada was less than \$500,000 in 1926, the earliest year covered by D.B.S. Reliable Toy Company Limited, established in Toronto in 1920, is the oldest known toy and game manufacturer operating in Canada today.

B. PRE-WAR TO POST-WAR DEVELOPMENT

From 1926 until the outbreak of the Second World War in 1939, the growth of the industry was comparatively slow. From 1926 to 1939, the number of establishments remained at 13; and although the value of shipments doubled, this growth was from a base value in 1926 of only \$479,000.

During the period of the war, 1939-1945, growth was much more rapid. The number of establishments increased more than four times (13 to 56), the number of employees multiplied fourfold (348 to 1,428), and production increased nearly five times (\$1 million to \$4.8 million).

Since 1945 the industry has continued to expand rapidly. In the decade after the war the industry's value of shipments, and its productivity, as measured by output per employee, increased two and one-half times. This rate of growth has accelerated in subsequent years, as will be discussed in the ensuing section.

C. CURRENT STATE OF THE INDUSTRY

The overall size of the toy and game industry in Canada, and the progress it has made in recent years is evident in Table 1.

TABLE 1

TOY AND GAME INDUSTRY - PRINCIPAL STATISTICS - CANADA - 1926 - 1966

	Estab- lish- ments	Employees	Produc- tion (Own Manufacture)	Value of Shipments (Own Manu- facture)	Value of Shipments (Total Activity)	Value of Shipments Toys and Games from all Industries
			\$000	\$000	\$000	\$000
1926	13	1114	479	470	-	-
1939	13	348	994	990	-	-
1941	19	547	1,466	1,466	-	-
1945	56	1,428	4,810	4,810	-	-
1950	56	1,624	9,446	9,440	-	16,140
1954	52	1,337	10,873	10,938	-	17,666
1955	56	1,405	12,133	12,311	-	19,951
1956	67	1,741	15,834	15,444	-	23,403
1957	67	2,133	-	18,682	-	25,275
1958	70	2,186	21,549	21,279	-	29,028
1959	69	2,634	24,156	25,148	-	32,599
1960	72	2,799	25,320	25,379	-	33,055
1961	73	3,037	29,482	29,614	31,391	37,132
1962	76	3,427	34,853	33,965	37,228	43,666
1963	79	3,328	38,167	37,921	42,237	46,734
1964	81	3,441	41,479	40,907	47,204	50,542
1965	81	3,567	44,999	43,927	49,624	54,298
1966*	81	3,924	49,847	49,810	55,067	57,008

*Preliminary data.

Sources: D.B.S. Catalogue No. 47-204 "Sporting Goods and Toy Industry"
D.B.S. Catalogue No. 47-205 "The Miscellaneous Industries"

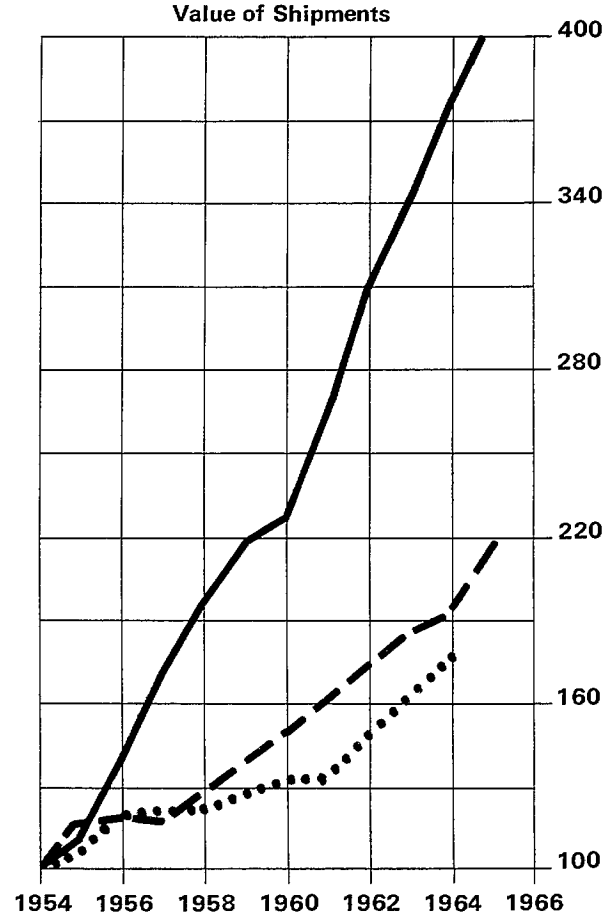
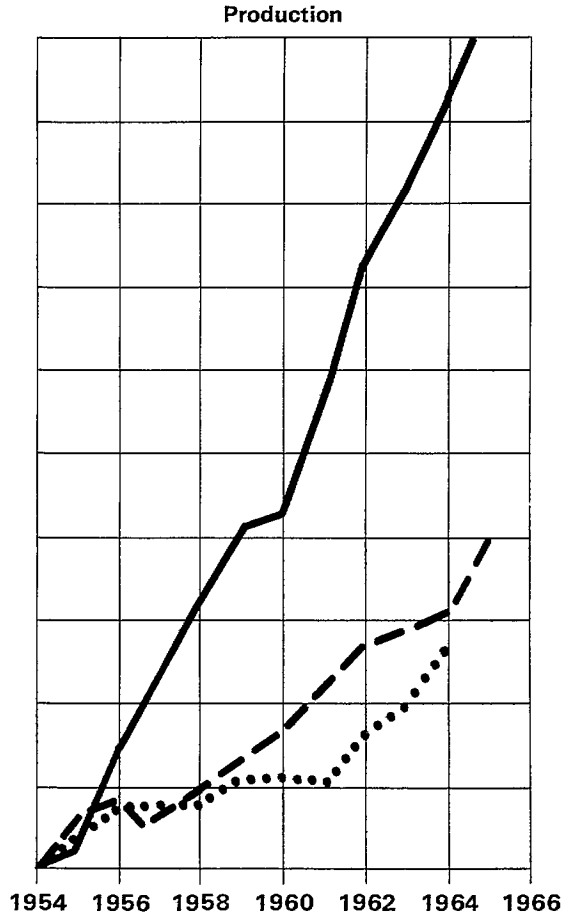
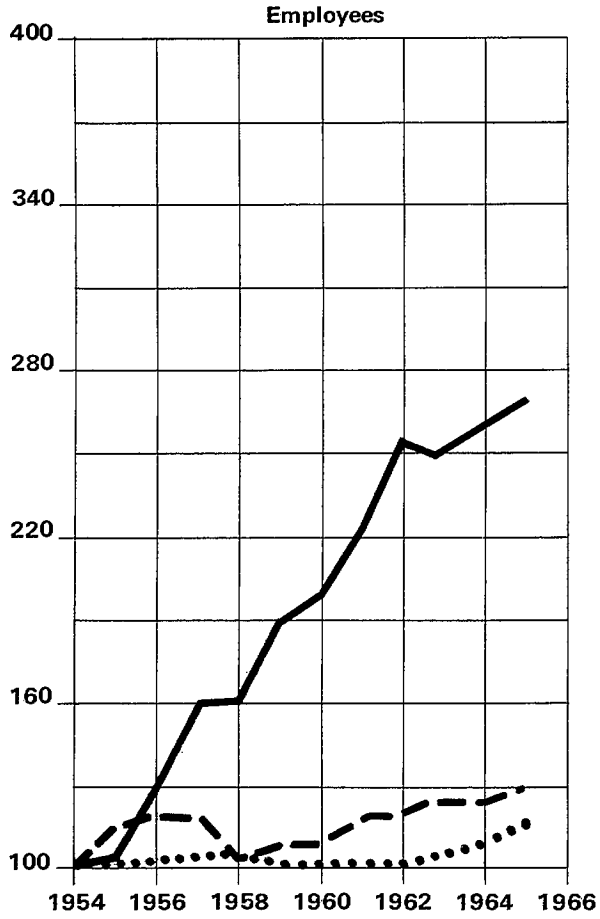
D. ESTABLISHMENTS

D.B.S. Catalogue No. 47-204 for the year 1964, lists 81 establishments, an increase of 29 since 1954, primarily engaged in manufacturing products classified to this industry. The number of companies listed is also 81, indicating that each company has only one establishment or plant.

CHART 2

INDEX OF TRENDS IN CANADIAN TOY AND GAME INDUSTRY, ALL MANUFACTURING INDUSTRIES, AND UNITED STATES TOY AND GAME INDUSTRY

Index of Trend: 1954-1965
1954 = 100



- Canadian Toy and Game Industry
- - - United States Toy and Game Industry
- Manufacturing Industries

TABLE 2

INDEX OF TREND OF EMPLOYMENT, PRODUCTION AND SHIPMENTS
IN THE CANADIAN TOY AND GAME INDUSTRY, ALL MANUFACTURING
INDUSTRIES AND THE UNITED STATES TOY AND GAME INDUSTRY: 1954 - 1965
1954 = 100

	Employment			Production			Value of Shipments		
	Canadian Toy and Game Industry	All Manu- facturing Industries	United States Toy and Game Industry	Canadian Toy and Game Industry	All Manu- facturing Industries	United States Toy and Game Industry	Canadian Toy and Game Industry	All Manu- facturing Industries	United States Toy and Game Industry
1954	100	100	100	100	100	100	100	100	100
1955	105	102	112	111	111	116	112	111	113
1956	130	106	119	145	124	126	141	123	123
1957	159	106	118	-	-	120	171	122	119
1958	163	100	103	198	123	128	194	122	126
1959	190	101	108	222	131	138	218	130	137
1960	208	101	109	233	133	147	228	132	145
1961	227	107	119	271	134	166	271	133	162
1962	256	109	118	320	148	178	310	147	173
1963	249	112	122	351	161	186	346	160	183
1964	257	117	121	381	177	194	374	175	192
1965	266	124	132	413	196	222	401	193	216

Source: D.B.S. Catalogue No. 47-204 "Sporting Goods and Toy Industry"
D.B.S. Catalogue No. 31-203 "Manufacturing Industries of Canada: Summary for Canada"
United States Department of Commerce Catalogue No. MC63(2)-39B "Musical Instruments and Parts;
Toys, and Sporting and Athletic Goods" and the "Annual Survey of Manufacturers"

Tables 1 and 5 also show that an important proportion of the total shipments originates in establishments not primarily engaged in the manufacture of toys and games, and is not therefore classified to this industry for statistical purposes.

E. EMPLOYEES, PRODUCTION AND SHIPMENTS

Between 1954 and 1965, the number of employees in Canada increased by 166 per cent against approximately 24 per cent in all manufacturing industries and 32 per cent in the United States.

In the same period, toy and game production multiplied four-fold while production increase for all manufacturing industries was below twofold.

In the United States, toy and game production more than doubled.

Almost parallel gains were made in the value of shipments. Table 2 illustrates these trends.

F. NON-MANUFACTURING REVENUES

While statistics which reveal non-manufacturing revenues for years prior to 1961 are not published, the figures show that since then an increasing proportion of the industry's total revenues is derived from non-manufacturing activities. The trend, as Table 3 indicates, shows a rise from 6 per cent in 1961 to above 10 per cent over a four-year period.

TABLE 3

NON-MANUFACTURING REVENUE OF TOY AND GAME INDUSTRY - CANADA: 1961 - 1965

	Value of Shipments (Own Manufacture) (Col. 1)	Value of Shipments (Total Activity) (Col.2)	Revenues from Non-Manufacturing Activity (Col. 2 minus Col. 1)	Non-Manufacturing Revenues as a Per Cent of Total Activity
	\$000	\$000	\$000	Per Cent
1961	29,614	31,391	1,777	6
1962	33,965	37,228	3,263	9
1963	37,921	42,237	4,316	10
1964	40,907	47,204	6,297	13
1965	43,927	49,624	5,697	11

G. VALUE OF SHIPMENTS, ALL INDUSTRIES

As indicated in Table 4, the value of shipments of Canadian-made toys and games by all industries has increased by 207 per cent in the period 1954-1965. This compares with an increase of 110 per cent in the United States in the same period. The actual figures, found in Appendices 1 and 2, show that the values of shipments in Canada in 1954 and in 1965 were \$17.7 million and \$54.3 million, compared with United States values of shipments of \$602 million and \$1,268 million respectively.

TABLE 4

INDEX OF TREND OF VALUE OF SHIPMENTS OF TOYS AND GAMES
FROM ALL INDUSTRIES: 1954-1965

	1954=100	
	Canada	United States
1954	100	100
1955	113	115
1956	132	120
1957	143	116
1958	164	125
1959	184	136
1960	187	140
1961	218	157
1962	247	163
1963	264	172
1964	286	185
1965	307	210

The proportion of shipments accounted for by establishments in Canada, which are not classified as being engaged primarily in the manufacture of toys and games, is shown in Table 5. In 1963, this proportion was 19 per cent. In the United States in the same year, the proportion was 6 per cent.

TABLE 5

PROPORTION OF VALUE OF SHIPMENTS OF TOYS AND GAMES
FROM OTHER THAN THE TOY AND GAME INDUSTRY: CANADA 1954-1965

	Value of Shipments of Toys and Games From All Industries	Value of Shipments Toy and Game Industry	Column 1 Minus Column 2	Difference as a Proportion of Column 1
	Col. 1	Col. 2		
	\$000	\$000	\$000	Per Cent
1954	17,666	10,938	6,728	38
1955	19,951	12,311	7,640	38
1956	23,403	15,444	7,959	34
1957	25,275	18,682	6,593	26
1958	29,028	21,279	7,749	27
1959	32,599	25,148	7,451	23
1960	33,055	25,379	7,656	23
1961	37,132	29,614	7,518	20
1962	43,666	33,965	9,701	22
1963	46,734	37,921	8,813	19
1964	50,542	40,907	9,635	19
1965	54,298	43,927	10,371	19

H. IMPORTANCE OF THE INDUSTRY

While the Canadian toy and game industry has shown an impressive record of accomplishment in recent years, it remains a comparatively small industry.

As shown in Table 6, employment, production and shipments of the industry amount to a fraction of one per cent of the corresponding figures for all manufacturing industries in Canada. None of these three factors amounts to 5 per cent of the comparable factor for the United States toy and game industry.

Nevertheless, the Canadian industry has registered steady improvement in recent years in its relative importance as measured by these comparisons.

TABLE 6

CANADIAN TOY AND GAME INDUSTRY AS A PROPORTION
OF ALL MANUFACTURING INDUSTRIES IN CANADA AND
THE UNITED STATES TOY AND GAME INDUSTRY - 1954, 1960, 1965

	<u>Employees</u> as a Pro- portion of		<u>Production</u> as a Pro- portion of		<u>Shipments</u> as a Pro- portion of	
	All Manu- facturing Indus- tries	United States Toy and Game Industry	All Manu- facturing Indus- tries	United States Toy and Game Industry	All Manu- facturing Indus- tries	United States Toy and Game Industry
	- Per Cent -		- Per Cent -		- Per Cent -	
1954	0.10	2.2	0.06	1.8	0.06	1.8
1960	0.20	4.2	0.11	2.8	0.11	2.8
1965	0.22	4.5	0.13	3.3	0.13	3.3

4. STRUCTURE OF THE INDUSTRY

A. TYPES AND VARIETY OF PRODUCTS MADE

A concept of the wide variety of products made by the toy and game industry can be obtained from an examination of the list of products in Appendix 6. Included, of course, are popular but comparatively short-lived novelties such as hoola hoop, and Davy Crockett and Batman heroes which appear at intervals. Such products make it difficult to develop a detailed statistical record of the industry's product output; and, in fact, statistics are published only for certain general categories.

Three major groups that have been identified are -

- A. Toys and Games
- B. Dolls
- C. Children's Vehicles

Value of shipments of certain categories of products within these three groups are shown in Tables 7A and 7B. Tables of this type for the United States industry appear in Appendix 2B.

The statistics show that group A, toys and games, is the largest single category in both Canada and the United States and appears to be increasing its preponderance. While not specifically mentioned among group A products, hobbies, including model railroads, aeroplanes, ships, science hobbies, "do-it-yourself" tools and kits, and crafts, appear to form a significant segment of the group, amounting to over 40 per cent in the United States in 1963.

Hobbies have been the fastest-growing segment of this group in the United States for many years, sales having increased from \$75 million in 1950 to more than \$500 million in 1963. No figures of this type are available for the Canadian industry.

Group B, dolls, and related items such as doll furnishings and carriages, is the next largest of the three groups. The statistics suggest that, both in Canada and in the United States, the proportion of the industry's value of shipments accounted for by group B is declining gradually.

Group C, children's vehicles, is the smallest of the three groups and, as was the case with Group B, children's vehicles account for a declining proportion of the toy and game industry's value of shipments.

B. SPECIALIZATION AND DIVERSIFICATION

Table 7A shows that 98 per cent of the value of shipments in 1963 by toy and game firms in Canada classified to S.I.C. 3931, were of toy and game products. The comparable figure in the United States was approximately 85 per cent. In turn, the companies included in this group of manufacturers accounted for 81 per cent of the sales of toys and games from all industries in Canada (94 per cent in the United States).

C. CONCENTRATION OF PRODUCTION AMONG FIRMS

As is common in many other industries, a small number of sizeable toy and game manufacturers account for a large proportion of the industry's production. In the Canadian toy and game industry, 15 of 81 firms accounted for 67 per cent of the industry's value of shipments in 1964. In that year, each of these 15 firms recorded shipments in excess of one million dollars. In 1959, six of 69 companies formed this group, their sales totalling 46 per cent of total industry shipments.

There appears to be an increasing trend to concentration of business among larger firms. Details in Table 8 suggest the importance of various groups based on value of shipments of own manufacture.

TABLE 7A

TOYS AND GAMES: PRODUCT GROUPS: CANADA: 1963 - 1964

TABLE 7B

Value of Shipments by Toy and Game Industry

	1963		1964	
	\$000	Proportion of Total	\$000	Proportion of Total
A. Toys and Games	32,253	84	35,602	86
- Plastic Toys	13,215	35	11,900	29
- Stuffed Animals	3,621	9	3,630	9
- Metal Toys	1,344	4	2,949	7
- Wooden Toys	539	1	990	2
- Gun & Holster Sets	1,505	4	2,382	6
- Toy Vehicles	376	1	411	1
- All Other Toys	9,244	24	10,743	26
- Games & Puzzles	2,327	6	2,427	6
B. Dolls	5,217	14	4,500	11
C. All Other Products (not related to Toys & Games products)	872	2	1,467	3
D. Payments received for work done on materials and products owned by others	82	-	170	.4
	38,342*	100	41,569*	100

Value of Shipments of Toys and Games from All Industries

	1961		1964	
	\$000	Proportion of Total	\$000	Proportion of Total
A. Toys and Games	27,629	74	39,364	78
- Plastic Toys	11,861	32	15,237	31
- Stuffed Animals	2,933	8	3,630	7
- Metal Toys	2,257	6	2,954	6
- Wooden Toys	766	2	1,143	2
- Play Balls	776	2	800	2
- Balloons	597	1	750	1
- Rubber Toys & Novelties	120	.3	280	.2
- Miscellaneous Toys	3,350	9	9,052	18
- Wading Pools	752	2	1,105	2
- Games & Puzzles	4,217	11	4,413	9
B. Dolls	5,835	16	7,137	14
- Dolls	4,300	12	4,607	9
- Doll Carriages	949	3	1,706	4
- Doll Furnishings	586	1	824	2
C. Children's Vehicles	3,667	10	4,041	8
- Tricycles, all types	1,297	4	1,902	4
- Toboggans	1,180	3	977	2
- Sleighs	383	1	366	.7
- Other Children's Vehicles	807	2	796	1
	37,132	100	50,542	100

* Gross Sales (deduct \$421,000 in 1963, \$662,000 in 1964 for value of sales taxes, excise duties and outward transportation charges, from total because of the difficulty in separating deductions separately from each group). Net sales would be \$37,921,000 in 1963, \$40,907,000 in 1964.

TABLE 7C

TRENDS BY PRODUCT CATEGORIES

Value of Shipments of Toys and Games from All Industries - Canada: 1954 - 57, 1961-65

	1954	1955	1956	1957	1961	1962	1963	1964	1965
	\$000	\$000	\$000	\$000	\$000	\$000	\$000	\$000	\$000
Toys and Games	10,887	12,645	15,126	16,329	27,629	33,881	36,042	39,364	42,791
Plastic toys	3,391	3,959	5,701	6,207	11,861	11,239	16,070	15,237	14,951
Metal toys	1,719	2,039	2,371	1,536	2,257	2,421	1,364	2,954	2,586
Wooden toys	684	758	640	780	766	981	633	1,143	1,737
Stuffed Animals	1,201	1,114	1,569	2,098	2,933	3,181	3,621	3,630	3,716
Play Balls	N.A.	N.A.	N.A.	N.A.	776	798	N.A.	800	N.A.
Balloons	346	482	419	480	597	647	689	750	791
Rubber Toys & Novelties	417	298	269	325	120	N.A.	N.A.	280	N.A.
Wading Pools	N.A.	N.A.	N.A.	N.A.	752	935	953	1,105	1,208
Games and Puzzles	1,815	1,799	1,971	2,177	4,217	4,705	4,138	4,413	5,072
Miscellaneous Toys (including toy vehicles)	1,314	2,196	2,186	2,726	3,350	8,974	8,574	9,052	12,730*
Dolls	4,813	5,130	5,590	6,011	5,835	6,240	7,054	7,137	6,780
Dolls	3,401	3,775	4,191	4,590	4,300	4,689	5,261	4,607	4,538
Doll Carriages (inc. prams (& strollers))	1,126	1,040	1,029	1,011	949	1,423	1,586	1,706	1,130
Doll Furnishings & Furniture	286	315	370	410	586	128**	207**	824	1,112
Children's Vehicles	1,966	2,176	2,687	2,935	3,667	3,545	3,638	4,041	4,727
Tricycles, all types	1,186	1,125	1,555	1,600	1,297	1,592	1,506	1,902	1,773
Toboggans	N.A.	N.A.	N.A.	N.A.	1,180	1,112	1,084	977	1,584
Sleighs	N.A.	331	352	446	383	354	397	366	491
Other Children's Vehicles (coasters, scooters, pedal autos)	780	720	780	889	807	487	651	796	879
TOTAL	17,666	19,951	23,403	25,275	37,131	43,666	46,734	50,542	54,298

* Includes \$2,310,000 for Road Race Sets (electric) and Parts

** Furniture only

CHART 3

TOY AND GAME INDUSTRY CONCENTRATION OF PRODUCTION BY SIZE OF ESTABLISHMENTS

Based on Value of Shipments — Canada
1964

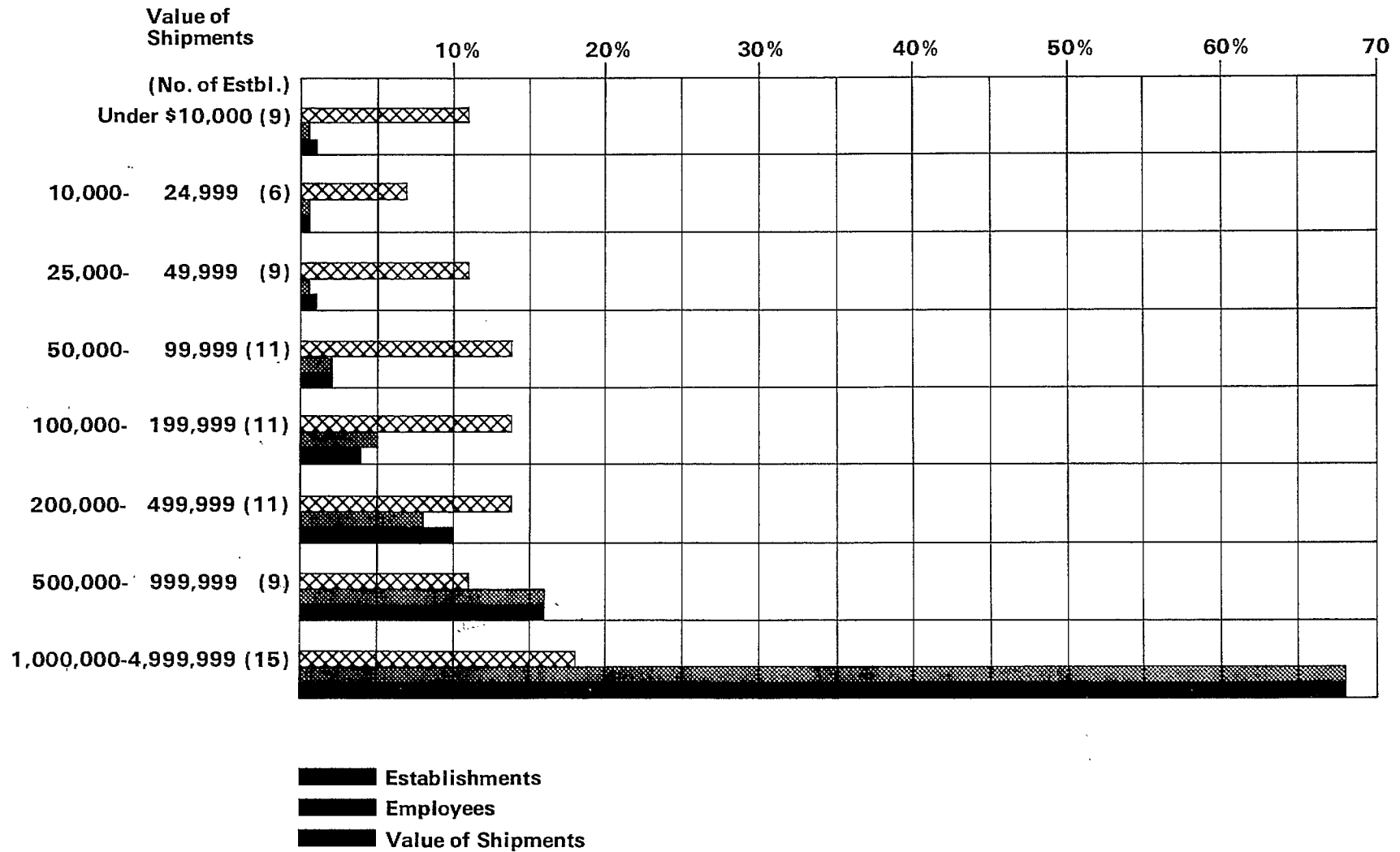
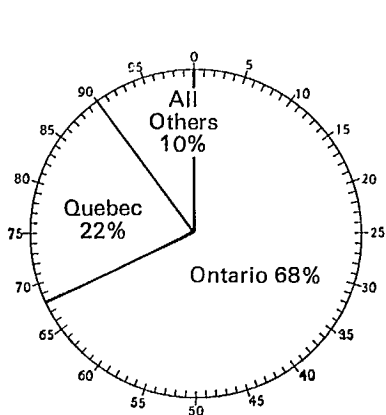
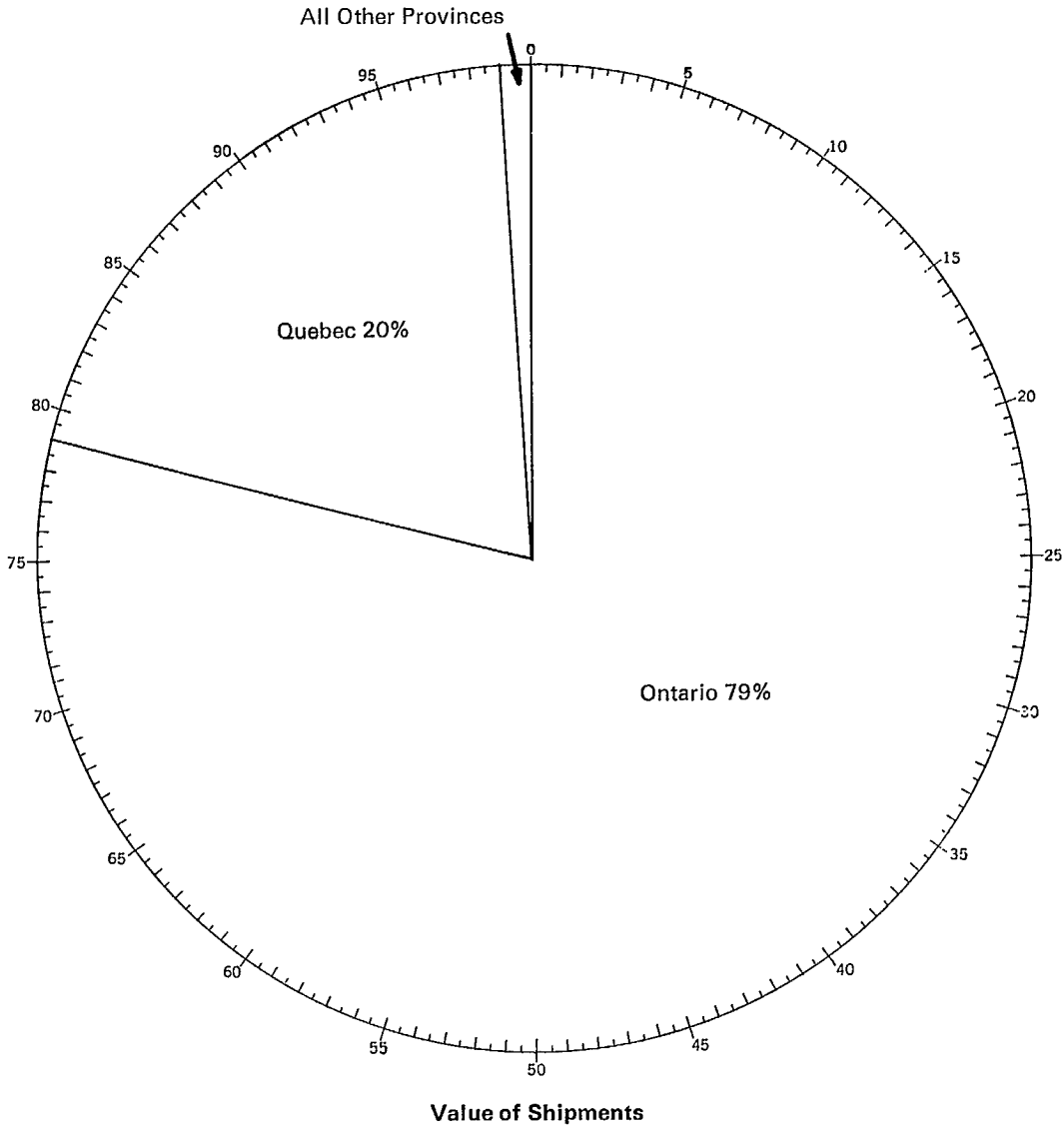


TABLE 8

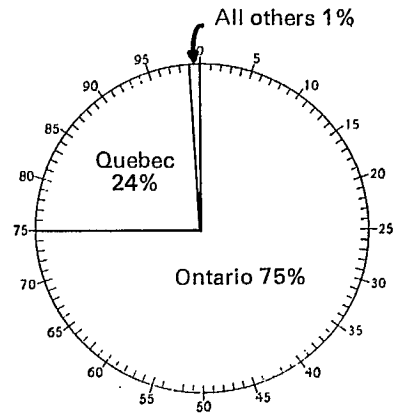
TOY AND GAME INDUSTRY CONCENTRATION BY SIZE OF ESTABLISHMENTS
 BASED ON VALUE OF SHIPMENTS OF OWN MANUFACTURE - CANADA: 1959 and 1964

Value of Shipments	1959			1964			1959		1964	
	Estab-lish-ments	Em-ploy-ees	Value of Ship-ments \$000	Estab-lish-ments	Em-ploy-ees	Value of Ship-ments \$000	Proportion of Total Employees	Proportion of Total Shipments	Proportion of Total Employees	Proportion of Total Shipments
Under \$10,000	10	15	51	9	3	36	.6	.2	.08	.09
10,000-24,999	12	42	218	6	13	104	1	.9	.4	.2
25,000-49,999	6	37	221	9	20	319	1	.9	.6	.8
50,000-99,999	5	52	383	11	83	820	2	1	2	2
100,000-199,999	5	103	1,270	11	164	1,794	4	5	5	4
200,000-499,999	11	347	3,447	11	287	4,171	13	14	8	10
500,000-999,999	10	677	8,102	9	563	6,343	26	32	16	16
1,000,000-4,999,999	6	1,361	11,456	15	2,308	27,321	52	46	67	67
TOTAL	69	2,634	25,148	81	3,441	40,907	100	100	100	100

CHART 4
REGIONAL DISTRIBUTION OF TOY AND GAME INDUSTRY — CANADA
1964



Establishments



Employees

TABLE 9

TOY AND GAME INDUSTRY - REGIONAL IMPORTANCE: CANADA 1961 - 1964

	<u>1961</u>	<u>1962</u>	<u>1963</u>	<u>1964</u>	<u>1961</u>	<u>1962</u>	<u>1963</u>	<u>1964</u>
	ESTABLISHMENTS				PROPORTION OF TOTAL			
					- Per Cent -			
Canada	73	76	79	81	100	100	100	100
Ontario	50	52	54	55	68	69	68	68
Quebec	16	14	15	16	22	18	19	20
Other Provinces	7	10	10	10	10	13	13	12
	EMPLOYEES				- Per Cent -			
Canada	3,037	3,427	3,328	3,441	100	100	100	100
Ontario	2,283	2,667	2,559	2,627	75	78	77	76
Quebec	738	737	750	794	24	21	22	23
Other Provinces	16	23	19	20	1	1	1	1
	VALUE OF SHIPMENTS				- Per Cent -			
	\$000				- Per Cent -			
Canada	29,614	33,965	37,921	40,907	100	100	100	100
Ontario	22,516	26,700	30,158	32,425	76	79	79	79
Quebec	7,004	7,100	7,532	8,150	24	21	20	20
Other Provinces	94	165	323	332	0.3	0.5	1	1

D. GEOGRAPHICAL LOCATION OF PRODUCTION

Almost all of the manufacture of toys and games in Canada occurs in two provinces, Ontario and Quebec.

Manufacturers in Ontario accounted for 76 per cent of the total in 1961, and 79 per cent in 1964. Those in Quebec accounted for 24 per cent of the industry's shipments, and 20 per cent in 1964. The remaining 1 per cent of shipments in 1964 was made by firms located in Nova Scotia, Manitoba and British Columbia.

The regional provincial distribution of employment, establishments, and shipments is shown in Table 9.

E. CAPITAL STRUCTURE OF THE INDUSTRY

There are no published data on capital investment by the toy and game industry alone. Figures are available, however, for the combined capital expenditures of the manufacturers of sporting goods and the manufacturers of toys and games.

As shown in Table 10, these two industries invested \$2.8 million in 1965. For the six years 1960-1965 inclusive, such expenditures have amounted to approximately 3 to 4 per cent of shipments by the two industries. Similar expenditures for all manufacturing industries have amounted to between 7 and 9 per cent of shipments.

In the United States, the toy industry's capital expenditures, which were \$36 million in 1963, have averaged about 3 to 5 per cent of the industry's shipments. If the Canadian toy and game industry's capital expenditures are assumed to be about 3 to 4 per cent of shipments in accordance with this pattern, they would amount to between \$1 million and \$2 million in 1965.

F. OWNERSHIP: RESIDENT AND NON-RESIDENT

Although a number of large American firms have Canadian subsidiaries, their share of ownership in the Canadian industry is not known. Of 15 establishments which shipped more than \$1 million worth of toys and games, 7 are Canadian-owned.

TABLE 10

SPORTING GOODS AND TOY INDUSTRIES: CANADA

CAPITAL AND REPAIR EXPENDITURES 1960 - 1965

	CAPITAL			REPAIR			TOTAL		Total Expenditures as a Proportion of the Value of Shipments	
	Construc- tion	Machin- ery & Equip- ment	Sub- Total	Construc- tion	Machin- ery & Equip- ment	Sub- Total	Grand Total	Annual Change Per Cent	Sporting Goods & Toys Industry Per Cent	All Manu- facturing Indus- tries Per Cent
	\$000	\$000	\$000	\$000	\$000	\$000	\$000			
1960	246	1,734	1,980	239	682	921	2,901		4	8
1961	247	1,501	1,748	182	633	815	2,563	-12	3	7
1962	140	1,414	1,554	208	455	663	2,217	-14	3	7
1963	1,189	1,030	2,219	161	462	623	2,842	28	3	7
1964	1,155	1,308	2,463	176	864	1,040	3,503	23	4	9
1965	366	1,308	1,674	191	941	1,132	2,806	-20	-	-

Source: D.B.S. Supplements "Private and Public Investment in Canada"

In 1963, a survey was made by the Corporations and Labor Unions Returns Act Division of the D.B.S. indicating the extent of non-resident ownership in various Canadian manufacturing industries. A similar survey was made in 1965; however the data had not been published at this writing.

In the 1963 survey, information on the toy and game industry and the sporting goods industry was combined. All firms with shipments over \$500,000 were covered, there being 43 firms in this category in the two industries in 1963. (In 1963 there were 23 firms with shipments of \$500,000 and over in the toy and game industry).

As Table 11 suggests, 15 of the 43 firms were 50 per cent or more owned by non-residents. In terms of assets, 71 per cent of the assets of these 43 companies were controlled by non-residents.

TABLE 11
DEGREE OF NON-RESIDENT OWNERSHIP IN
SPORTING GOODS AND TOY INDUSTRY - CANADA 1963

Degree of Non-Resident Ownership	Corporations over \$500,000 in sales	Assets	Equity	Sales	Profits
		\$000	\$000	\$000	\$000
50% and over -	15	76,094	15,366	37,976	(1,540)
Under 50%	28	30,813	12,792	48,966	1,816
Total	43	106,907	28,158	86,942	276

Source: D.B.S. - Corporations and Labor Unions Returns Act Report, 1963

G. TECHNOLOGICAL STATE OF THE INDUSTRY

The toy and game industry, by and large, does not appear to require the degree of technological expertise that more technically-oriented industries require. Nevertheless the intense competition of new ideas which exists in this industry requires a high adaptability to change. Accordingly, great attention must be paid to product development.

Generally, it seems that little scientific research or development is carried out by this industry in Canada. Those firms which have foreign-based parents usually have access to the results of the research and development conducted by the parents. In addition, products made under licence are common.

H. TREND IN EMPLOYMENT

The toy and game industry in Canada employed 3,567 people in 1965. There has been a substantial increase in employees in recent years (Tables 1 and 2). Employment advanced from 1,337 to 3,567, i.e. 166 per cent, in the period 1954-1965. By comparison, the number of employees increased by 32 per cent in the same period in the United States toy and game industry, and by 24 per cent in all manufacturing industries in Canada.

Production and related workers make up the largest segment of the total number of employees and represented 84 per cent of the total in 1964 as against 80 per cent in 1961. Sixty per cent of the labor force is female.

The outstanding feature with regard to labor force requirements is the seasonal variation in this industry. Because of the highly seasonal nature of the industry (more than 55 per cent of its retail sales take place in the last two months of the year) September, October and November are the months of highest employment and December and January are the lowest. (See Table 12)

SEASONAL PATTERN IN LABOUR FORCE IN TOY AND GAME INDUSTRY — CANADA

Monthly Index — Over or Under the Annual Average = 100

(1964)

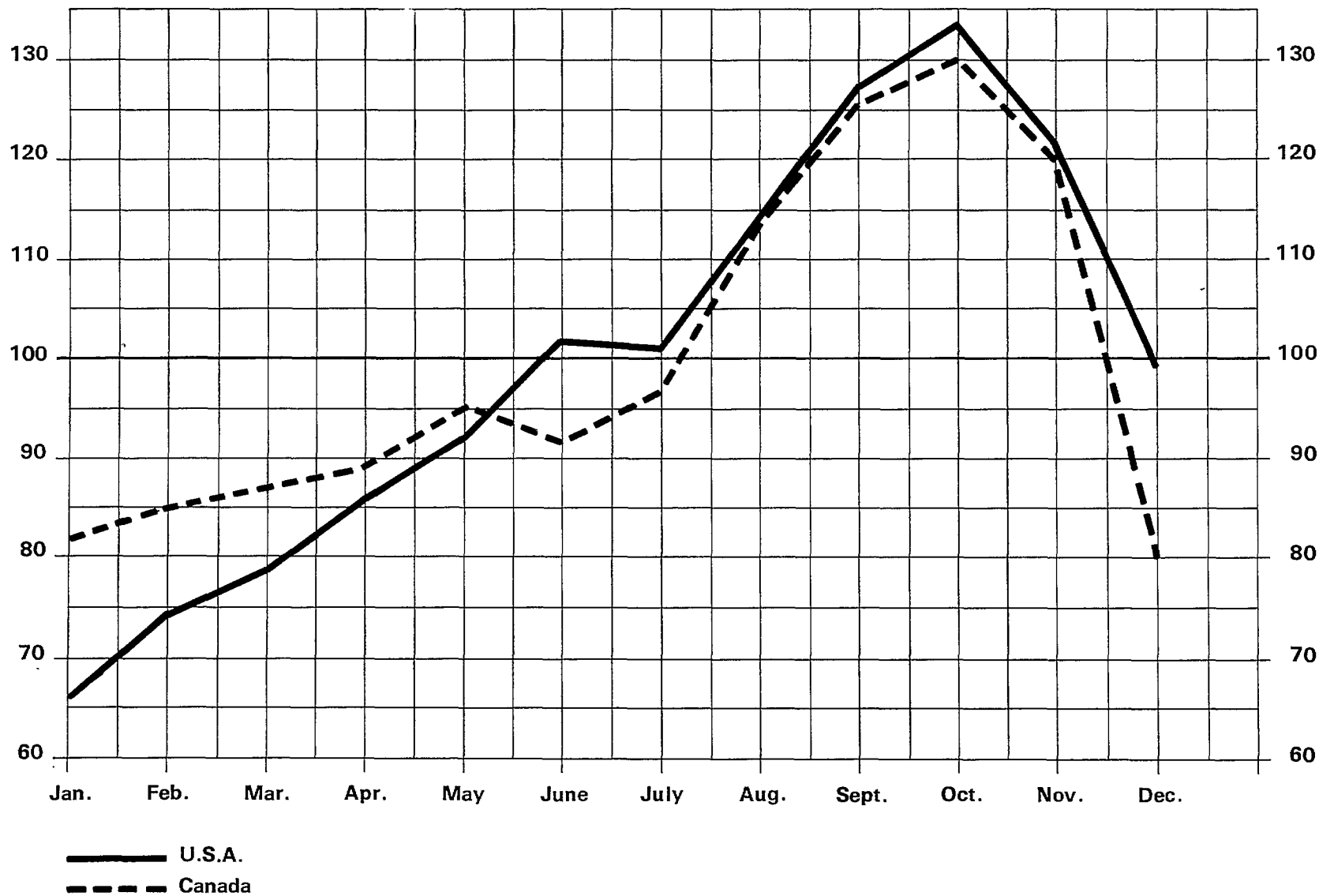


TABLE 12
SEASONAL FLUCTUATIONS
IN LABOR FORCE IN
TOY AND GAME INDUSTRY - CANADA 1964

Month	Monthly Labor Force	Monthly Index Over or Under Average
January	2,274	82
February	2,335	85
March	2,409	87
April	2,454	89
May	2,624	95
June	2,544	92
July	2,677	97
August	3,150	114
September	3,489	126
October	3,600	130
November	3,309	120
December	2,221	80
Average*	2,761	100

*Very small establishments are excluded in calculating monthly averages because they report on annual basis only. Their annual average for 1964 was 123. Average for all establishments was 2,884.

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5. TARIFF STRUCTURE

CANADIAN AND FOREIGN TARIFFS

As a result of the GATT agreement signed in 1967, a somewhat new situation has been created for the toy and game industry.

Progressive reductions will be made in the rate of duty imposed by Canada on imports of toys and games, until, by 1972, the rates will in most cases be 17 1/2 - 20 per cent, compared to the current range of 22 1/2 - 30 per cent. Other GATT nations agreed to important concessions in their toy and game tariffs at the same time. Canada's neighbor, the United States, made concessions of 50 per cent in many of its toy and game tariffs. This should present additional opportunities to the Canadian toy and game industry which exported about \$1.8 million - half of its total exports of toys and games - to the United States in 1966.

Further information on Canada's current tariffs and on concessions under GATT will be found in Appendix 7A. In addition, examples of United States tariffs on toys and games are listed in Appendix 7B.

6. PRODUCTIVITY AND CERTAIN OPERATING RATIOS

TABLE 13A

PRODUCTIVITY 1954 - 1965

	Gross Production Per Production Worker			Canadian Toy and Game Industry as a Proportion of		Factory Shipments Per Employee			Canadian Toy and Game Industry as a Proportion of		Value Added per Employee			Canadian Toy and Game Industry as a Proportion of	
	Canadian Toy and Game Industry	All Manu- facturing Industries	United States Toy and Game Industry	All Manu- facturing Industries	United States Toy and Game Industry	Canadian Toy and Game Industry	All Manu- facturing Industries	United States Toy and Game Industry	All Manu- facturing Industries	United States Toy and Game Industry	Canadian Toy and Game Industry	All Manu- facturing Industries	United States Toy and Game Industry	All Manu- facturing Industries	United States Toy and Game Industry
	\$	\$	\$	Per Cent	Per Cent	\$	\$	\$	Per Cent	Per Cent	\$	\$	\$	Per Cent	Per Cent
1954	10,296	19,984	11,751	51	87	8,181	13,843	10,291	59	79	3,848	6,232	5,173	62	74
1955	10,871	21,733	12,220	50	89	8,762	15,028	10,387	58	84	4,101	6,741	5,390	61	76
1956	-	-	-	-	-	8,870	15,991	10,627	55	83	4,210	7,099	5,582	59	74
1957	-	-	-	-	-	8,758	15,990	10,381	55	84	-	-	5,327	-	-
1958	-	-	-	-	-	9,734	16,841	12,616	58	77	4,848	7,429	6,463	65	75
1959	10,674	-	15,684	-	68	9,369	17,728	13,037	53	72	4,714	7,884	6,571	60	72
1960	10,523	-	16,547	-	63	8,985	18,252	13,622	49	66	4,374	8,131	7,085	53	72
1961	12,162	25,048	16,766	48	72	9,751	17,328	14,075	56	69	4,755	7,714	7,610	62	62
1962	12,687	26,627	18,221	48	70	9,911	18,560	15,042	53	66	4,729	8,225	8,302	57	57
1963	13,770	28,073	18,487	49	74	11,394	19,653	15,457	58	74	5,157	8,609	8,507	60	61
1964	14,362	29,390	19,295	49	74	11,888	20,691	16,317	57	73	5,899	9,077	8,790	65	61
1965	15,100	30,671	19,482	49	77	12,314	21,581	16,775	57	73	6,067	9,506	9,614	64	63
	<u>Total Activity</u>					<u>Total Activity</u>					<u>Total Activity</u>				
1961	12,981	27,688	16,766	46	77	10,336	19,145	14,075	54	73	4,937	8,082	7,610	61	65
1962	13,976	29,398	18,221	47	77	10,863	20,491	15,042	53	72	4,878	8,626	8,302	56	59
1963	15,333	30,887	18,487	49	83	12,691	21,623	15,457	59	82	5,336	9,032	8,507	59	63
1964	16,563	32,463	19,295	51	86	13,718	22,847	16,317	60	84	6,208	9,553	8,790	65	70
1965	17,012	34,074	19,482	50	87	13,911	23,968	16,775	58	83	6,459	10,052	9,614	64	67

Data on the United States industry are calculated on "total activity" basis only. Nevertheless they have been compared with the Canadian data both on "own manufacturing" and "total activity" basis to provide comparative long-term trends useful for analysis. Canadian "total activity" data prior to 1961 are not published.

TABLE 13B
PRODUCTIVITY 1954 - 1965

	Production Per \$1000 of Payroll (Wages & Salaries)			Canadian Toy and Game Industry as a Proportion of		Production Per \$1000 of Wages only			Canadian Toy and Game Industry as a Proportion of		Production Per 1000 Man-Hours Paid			Canadian Toy and Game Industry as a Proportion of	
	Canadian Toy and Game Industry	All Manufacturing Industries	United States Toy and Game Industry	All Manufacturing Industries	United States Toy and Game Industry	Canadian Toy and Game Industry	All Manufacturing Industries	United States Toy and Game Industry	All Manufacturing Industries	United States Toy and Game Industry	Canadian Toy and Game Industry	All Manufacturing Industries	United States Toy and Game Industry	All Manufacturing Industries	United States Toy and Game Industry
	\$	\$	\$	Per Cent	Per Cent	\$	\$	\$	Per Cent	Per Cent	\$	\$	\$	Per Cent	Per Cent
1954	3,468	4,486	3,465	77	100	-	-	-	-	-	-	-	-	-	-
1955	3,656	4,700	3,517	78	103	-	-	-	-	-	-	-	-	-	-
1956	3,931	4,757	3,477	82	113	-	-	-	-	-	-	-	-	-	-
1957	-	-	3,301	-	-	-	-	-	-	-	-	-	-	-	-
1958	3,840	4,519	3,672	85	104	-	-	-	-	-	-	-	-	-	-
1959	3,762	4,559	3,750	82	100	-	-	-	-	-	-	-	-	-	-
1960	3,554	4,516	3,887	78	91	-	-	-	-	-	-	-	-	-	-
1961	3,633	4,127	3,994	87	91	5,364	6,660	5,693	80	94	6,056	11,956	9,168	50	66
1962	3,785	4,256	4,087	89	92	5,524	6,766	5,731	81	96	5,997	12,525	9,541	48	63
1963	3,875	4,337	4,003	89	97	5,763	6,878	5,672	84	101	6,389	13,178	9,810	48	65
1964	3,926	4,389	3,966	85	99	5,680	6,886	5,698	82	99	7,012	13,720	10,150	51	69
1965	3,906	4,375	4,055	89	96	5,482	6,828	5,926	80	92	7,203	14,356	11,073	50	65
	<u>Total Activity</u>					<u>Total Activity</u>					<u>Total Activity</u>				
1961	3,877	4,562	3,994	85	97	5,725	7,362	5,693	78	100	6,464	13,215	9,168	50	70
1962	4,169	4,699	4,087	82	102	6,085	7,470	5,731	81	106	6,607	13,829	9,541	48	69
1963	4,315	4,772	4,003	90	108	6,418	7,563	5,672	85	113	7,116	14,498	9,810	49	72
1964	4,521	4,848	3,966	93	114	6,541	7,605	5,698	86	115	8,075	15,155	10,150	53	79
1965	4,400	4,860	4,055	91	109	6,176	7,586	5,926	81	104	8,115	15,949	11,073	51	73

See footnote to Table 13A

TABLE 11
PRODUCTIVITY: INDEX OF TREND 1954 - 1965

	<u>Gross Production Per Production Worker</u>			<u>Factory Shipments Per Employee</u>			<u>Value Added Per Employee</u>			<u>Production Per \$1000 of Payroll (Wages & Salaries)</u>			<u>Production Per \$1000 of Wages only</u>			<u>Production Per 1000 Man-hours paid</u>		
	<u>Own Manufacturing</u>			<u>Own Manufacturing</u>			<u>Own Manufacturing</u>			<u>Own Manufacturing</u>			<u>Own Manufacturing</u>			<u>Own Manufacturing</u>		
	<u>Canadian Toy and Game Industry</u>	<u>All Manu- facturing Industries</u>	<u>United States Toy and Game Industry</u>	<u>Canadian Toy and Game Industry</u>	<u>All Manu- facturing Industries</u>	<u>United States Toy and Game Industry</u>	<u>Canadian Toy and Game Industry</u>	<u>All Manu- facturing Industries</u>	<u>United States Toy and Game Industry</u>	<u>Canadian Toy and Game Industry</u>	<u>All Manu- facturing Industries</u>	<u>United States Toy and Game Industry</u>	<u>Canadian Toy and Game Industry</u>	<u>All Manu- facturing Industries</u>	<u>United States Toy and Game Industry</u>	<u>Canadian Toy and Game Industry</u>	<u>All Manu- facturing Industries</u>	<u>United States Toy and Game Industry</u>
1954	100	100	100	100	100	100	100	100	100	100	100	100	-	-	-	-	-	-
1955	105	109	104	107	108	101	106	108	104	105	105	101	-	-	-	-	-	-
1956	-	-	-	108	115	103	109	114	108	113	106	100	-	-	-	-	-	-
1957	-	-	-	107	115	101	-	-	103	-	-	95	-	-	-	-	-	-
1958	-	-	-	119	121	122	126	119	125	111	101	106	-	-	-	-	-	-
1959	104	-	133	114	128	127	122	126	127	108	102	108	-	-	-	-	-	-
1960	102	-	111	110	132	132	114	130	137	102	101	112	-	-	-	-	-	-
1961	116	125	113	119	125	137	123	124	147	105	92	115	100	100	100	100	100	100
1962	123	133	155	121	134	146	123	132	160	109	95	118	103	101	101	99	105	104
1963	134	140	157	139	142	150	134	138	164	112	97	115	107	103	100	105	110	107
1964	139	147	164	145	149	158	153	145	170	113	98	114	106	103	100	116	115	111
1965	146	153	166	150	156	189	158	152	186	113	98	117	102	102	104	119	120	121
	<u>Total Activity</u>			<u>Total Activity</u>			<u>Total Activity</u>			<u>Total Activity</u>			<u>Total Activity</u>			<u>Total Activity</u>		
1961	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
1962	108	106	109	105	107	107	99	107	109	107	103	102	106	101	101	102	105	104
1963	118	111	115	128	113	110	108	112	112	111	105	100	112	103	100	110	110	107
1964	127	117	115	133	119	116	125	118	115	117	106	100	114	103	100	125	115	111
1965	131	123	116	135	125	138	131	124	126	113	106	101	108	103	104	126	121	121

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A. PRODUCTIVITY

As observed earlier, the toy and game industry in Canada has made notable advances in production and shipments. Between 1954 and 1965, production increased 313 per cent and value of shipments 301 per cent. However, there was a substantial rise in the number of employees in the same period (166 per cent). As a consequence, the large increase in production was accompanied by a smaller increase in output per employee.

Tables 13A and 13B provide an indication of the productivity of the industry as measured by ratios of gross production per production worker, shipments per employee, value added per employee, production per dollar of payroll, production per dollar of wage, and production per man-hour paid--all in comparison with the United States toy and game industry, and with all manufacturing industries in Canada. A few trends are apparent.

Although labor productivity, as measured by gross production per production worker, in the Canadian toy and game industry advanced by 46 per cent in the period 1954-1965, compared with 66 per cent in the United States industry, it has grown faster in Canada during the four-year period 1961-1965 than in the United States, the rise having been 31 per cent compared with 16 per cent in the United States.

The ratio of factory shipments per employee in the Canadian toy and game industry has increased by 50 per cent in the 1954-65 period, compared with 89 per cent in the United States.

Value added per employee rose by 58 per cent in Canada as against 86 per cent in the United States between 1954 and 1965.

B. SELECTED OPERATING RATIOS AS A PERCENTAGE OF GROSS PRODUCTION

Three important operating ratios were calculated for the toy and game industry using statistics published in D.B.S. catalogue No. 47-204. The ratios were

Cost of Materials and Supplies to Gross Production
Value Added to Gross Production
and Wages and Salaries to Gross Production.

TABLE 15

SELECTED OPERATING RATIOS AS PROPORTION OF GROSS PRODUCTION

1954 - 1965

	<u>Cost of Materials and Supplies</u>			<u>Value Added</u>			<u>Wages and Salaries</u>		
	Canadian Toy and Game Industry	All Manu- facturing Industries	United States Toy and Game Industry	Canadian Toy and Game Industry	All Manu- facturing Industries	United States Toy and Game Industry	Canadian Toy and Game Industry	All Manu- facturing Industries	United States Toy and Game Industry
	Own Manufacturing - Per Cent -			Own Manufacturing - Per Cent -			Own Manufacturing - Per Cent -		
1954	51	53	49	48	45	50	29	22	29
1955	51	53	48	48	45	51	27	21	28
1956	52	54	48	47	44	51	25	21	29
1957	NA	NA	48	NA	NA	51	NA	NA	30
1958	50	54	49	49	44	50	26	22	27
1959	49	54	49	50	44	50	26	22	27
1960	51	53	48	48	45	51	28	22	26
1961	50	54	46	49	44	53	27	24	25
1962	53	54	46	46	44	53	26	23	24
1963	54	54	45	45	44	54	26	23	25
1964	50	54	46	49	44	53	25	23	25
	<u>Total Activity</u>			<u>Total Activity</u>			<u>Total Activity</u>		
1961	51	56	46	48	42	53	26	22	25
1962	55	56	46	43	42	53	24	21	24
1963	51	57	45	42	41	54	23	21	25
1964	54	57	46	45	41	53	22	21	25
1965	54	57	48	45	41	51	23	21	25

See footnote to Table 13A

It is observed, in Table 15, that the ratio of cost of materials and supplies to gross production in the Canadian toy and game industry is lower than the average for all manufacturing industries. The value-added ratio in the toy and game industry is higher than the average for all manufacturing industries.

The ratio of wages and salaries to gross production in the Canadian toy and game industry has manifested a decreasing trend both on own manufacturing and total activity basis. This ratio in the toy and game industry, however, is higher than the average for all manufacturing industries. This is significant in view of the fact that wages in the toy and game industry are about 1/3 less than the average wages in all manufacturing industries.

Table 16 lists ratios computed by considering wages separately from salaries. The ratios are annual wages per worker, wages per man-hour paid, and annual salary per salaried employee. These ratios for the toy and game industry in Canada are compared with those for the United States industry and for all manufacturing industries in Canada.

C. RAW MATERIALS

Plastics seems to be the most widely used single type of raw material in this industry. In the years immediately following the Second World War, plastics began to play an increasingly important role in the toy industry. Technical improvements in plastics and lower prices have favored greater use of these materials.

In 1964, according to D.B.S., nearly 30 per cent of the toy and game industry's shipments were of plastic toys. Taking into account other toys which contain plastic parts, but which are not classed as plastic toys, it can be assumed that 50 per cent of the value of raw materials used by this industry in 1964 was plastics. This compares with an estimated 15-20 per cent in 1950. In the United States, it has been estimated that 50 per cent of the value

of materials used by the toy and game industry is accounted for by plastics.

Among other raw materials used in this industry, synthetic fibres are favored materials for such things as doll parts and accessories and stuffed animals which, together, account for 20-25 per cent of total industry shipments. Additional materials used in significant amounts include rubber, metals, wood, paper and cardboard.

TABLE 16
WAGES AND SALARIES 1959 - 1965

	Annual Wages Per Worker			Canada as a Proportion of		Wages per Man-hour Paid			Canada as a Proportion of		Annual Salary Per Employee (other than Production Worker)			Canada as a Proportion of	
	Canadian Toy and Game Industry	All Manu-facturing Industries	United States Toy and Game Industry	All Manu-facturing Industries	United States Toy and Game Industry	Canadian Toy and Game Industry	All Manu-facturing Industries	United States Toy and Game Industry	All Manu-facturing Industries	United States Toy and Game Industry	Canadian Toy and Game Industry	All Manu-facturing Industries	United States Toy and Game Industry	All Manu-facturing Industries	United States Toy and Game Industry
	\$	\$	\$	- Per Cent -		\$	\$	\$	- Per Cent -		\$	\$	\$	- Per Cent -	
1959	2,125	3,509	2,995	60	71	1.04	1.70	1.59	61	65	4,951	4,787	5,910	103	84
1960	2,225	3,628	3,010	61	74	1.04	1.74	1.58	60	66	4,700	4,949	6,411	95	73
1961	2,267	3,760	2,944	60	77	1.13	1.79	1.61	63	70	4,272	5,248	7,322	81	58
1962	2,296	3,935	3,179	58	72	1.08	1.85	1.66	58	65	4,263	5,447	7,038	78	61
1963	2,389	4,081	3,258	59	73	1.10	1.91	1.73	58	64	5,805	5,687	7,747	102	75
1964	2,532	4,268	3,386	59	75	1.23	1.99	1.78	62	69	5,858	5,918	8,641	99	68
1965	2,754	4,472	3,287	62	84	1.31	2.12	1.86	62	70	5,642	6,254	9,600	90	59
	<u>INDEX</u>					<u>INDEX</u>					<u>INDEX</u>				
1959	100	100	100			100	100	100			100	100	100		
1965	129	127	110			126	125	117			114	130	162		

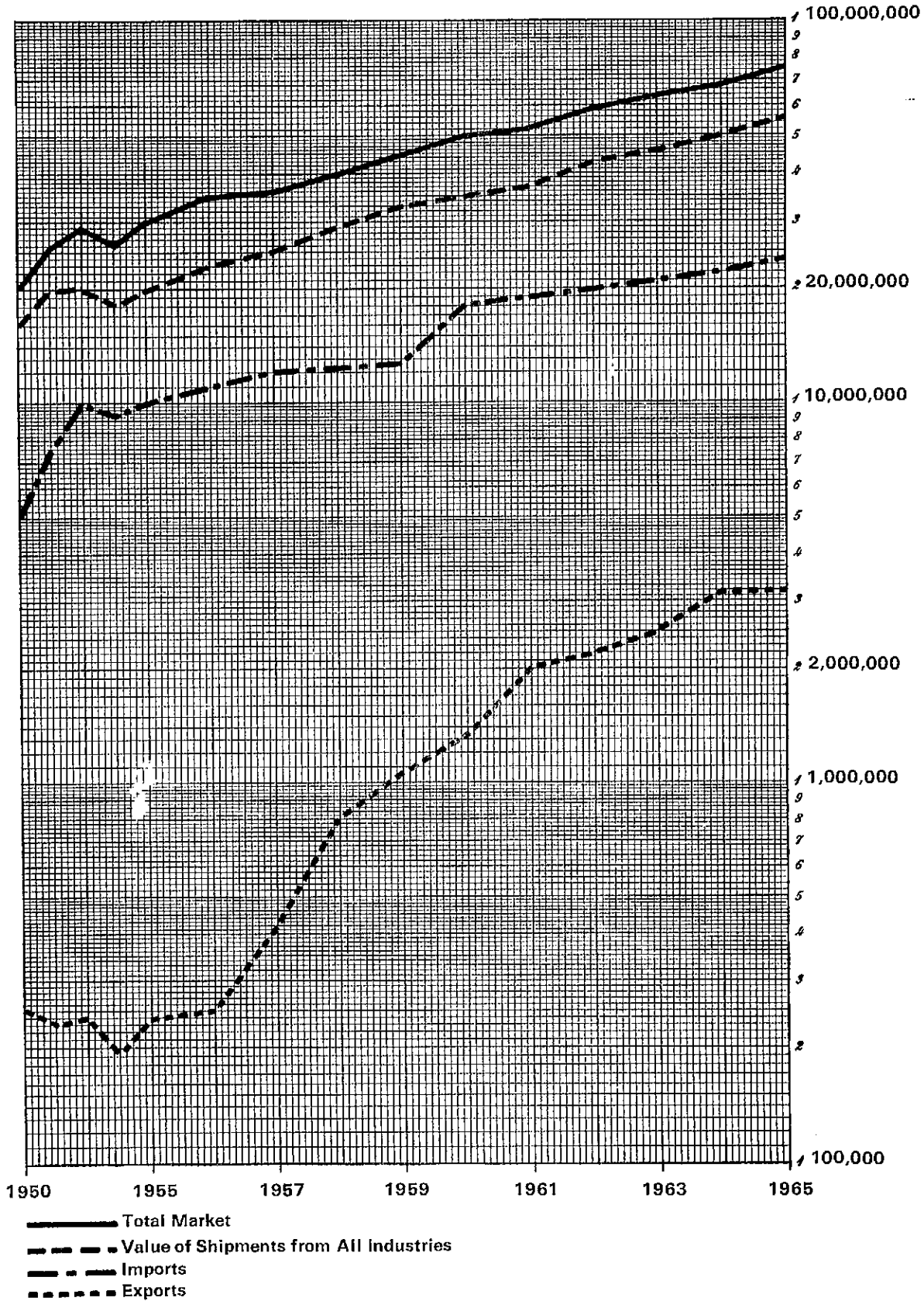
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7. MARKETS

CHART 6

TOTAL TOY AND GAME MARKET AND SEGMENTS — CANADA

1950 - 1965



A. TOTAL MARKET

Total consumption of toys and games in Canada has grown impressively in the last decade. As indicated in Table 17, the total market reached a value of about \$75 million in 1965, nearly three times its 1954 value.

The market in the United States increased from \$627 million in 1954 to \$1,464 million in 1965, a growth of 133 per cent. This compares with 180 per cent in Canada, as Table 18 shows.

TABLE 17

TOTAL TOY AND GAME MARKET AND SEGMENTS - CANADA 1950 - 1965

	Value of Shipments of Toys and Games from All Industries	Deduct Exports	Add Imports	Total Toy and Game Market
	\$000	\$000	\$000	\$000
1950	\$16,140	\$ 254	\$ 4,527	\$20,413
1951	16,286	368	6,304	22,222
1952	18,432	231	7,664	25,865
1953	19,537	236	10,050	29,351
1954	17,666	186	9,293	26,773
1955	19,951	234	10,081	29,798
1956	23,403	247	11,141	34,297
1957	25,275	426	11,757	36,606
1958	29,028	817	12,310	40,521
1959	32,599	1,031	12,569	44,137
1960	33,055	1,324	17,911	49,642
1961	37,132	2,044	18,386	53,474
1962	43,666	2,299	19,935	61,302
1963	46,734	2,533	20,489	64,690
1964	50,542	3,197	21,863	69,208
1965	54,298	3,213	23,904	74,989

Source: Imports: D.B.S. Catalogue No. 65-007 "Trade of Canada, Imports by Commodities"
 Exports: D.B.S. Catalogue No. 65-004 "Trade of Canada, Exports by Commodities"

TABLE 18

INDEX OF TREND OF THE TOTAL TOY AND GAME MARKET AND SEGMENTS
IN CANADA AND UNITED STATES 1954 - 1965

1954 = 100

	Value of Shipments of Toys and Games from All Industries		Exports		Imports		Total Toy and Game Market	
	Canada	United States	Canada	United States	Canada	United States	Canada	United States
1954	100	100	100	100	100	100	100	100
1955	113	115	125	102	108	132	111	117
1956	132	120	132	120	120	185	128	124
1957	143	116	229	129	126	203	137	121
1958	164	125	439	133	132	185	151	129
1959	184	136	554	129	135	240	165	142
1960	187	140	712	130	193	275	185	149
1961	218	157	1,100	140	198	293	200	166
1962	247	163	1,236	131	214	384	229	178
1963	264	172	1,362	131	220	450	241	190
1964	286	185	1,719	159	235	513	258	206
1965	307	210	1,727	239	257	582	280	233

Per capita domestic consumption of toys and games in Canada advanced by 116 per cent in the period 1954 to 1965. This compared with 95 per cent in the United States, as shown in Table 19. However, per capita consumption in Canada, at \$3.81 in 1965, was only half of the United States figure of \$7.55.

CHART 7

TOY AND GAME PER CAPITA TREND

1954 - 1965

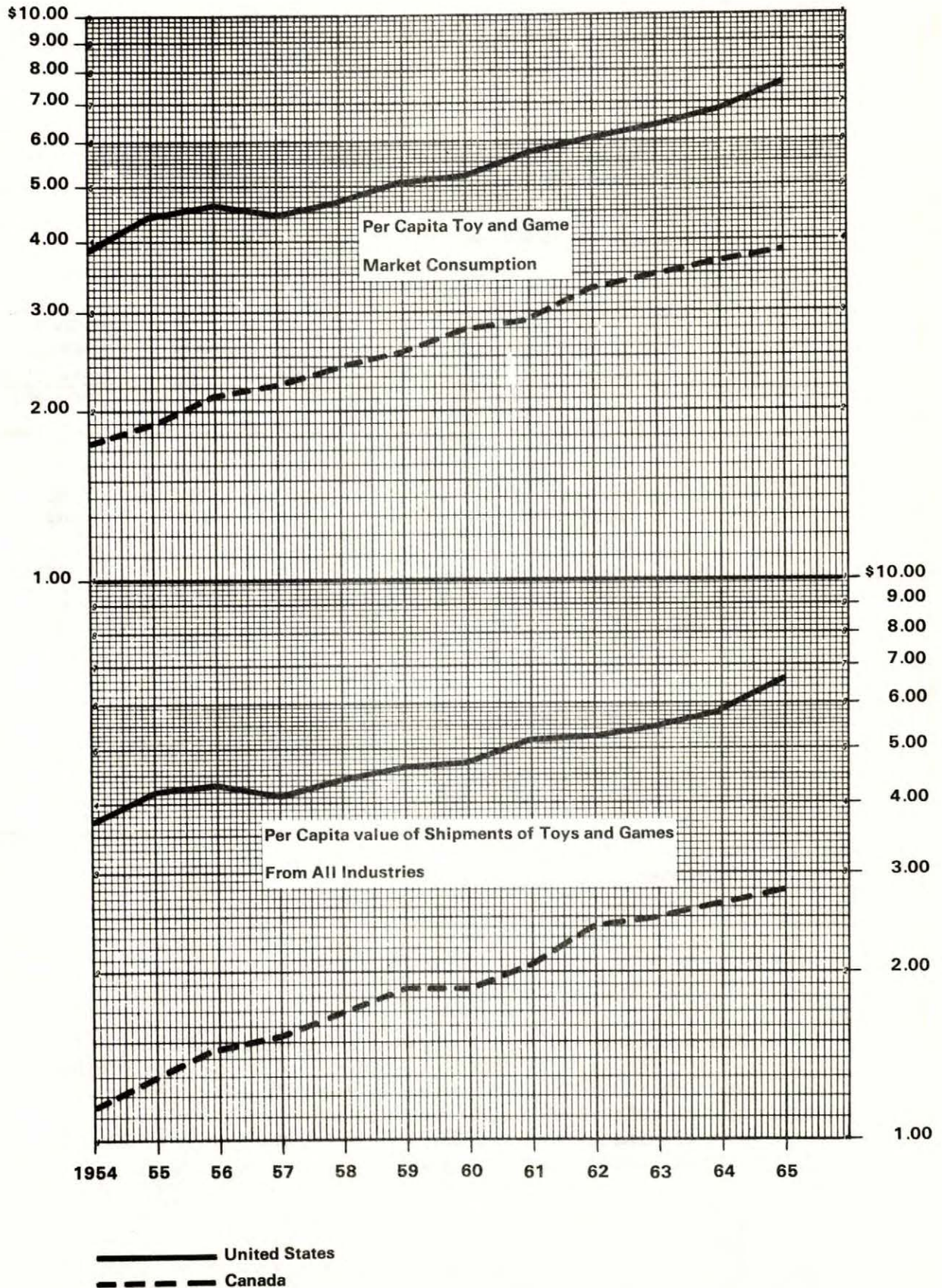


TABLE 19

TOYS AND GAMES PER CAPITA TREND IN CANADA AND UNITED STATES

	<u>PER CAPITA VALUE OF SHIPMENTS OF TOYS AND GAMES FROM ALL INDUSTRIES</u>			<u>PER CAPITA TOTAL TOY AND GAME MARKET CONSUMPTION</u>		
	1954 - 1965			1954 - 1965		
	Canada	United States	Canada as a Proportion of United States Per Cent	Canada	United States	Canada as a Proportion of United States Per Cent
	\$	\$		\$	\$	
1954	1.16	3.70	31	1.76	3.86	45
1955	1.28	4.19	30	1.91	4.43	43
1956	1.45	4.30	34	2.13	4.64	46
1957	1.52	4.09	37	2.20	4.45	49
1958	1.70	4.34	39	2.37	4.66	51
1959	1.86	4.61	40	2.52	5.04	50
1960	1.84	4.67	39	2.78	5.18	54
1961	2.03	5.16	39	2.93	5.70	51
1962	2.35	5.28	44	3.30	6.00	55
1963	2.47	5.49	45	3.42	6.32	54
1964	2.62	5.80	44	3.59	6.76	52
1965	2.76	6.54	42	3.81	7.55	50

	<u>Index</u>			<u>Index</u>	
1954	100	100	100	100	
1965	237	176	216	195	

Per capita shipments of toys and games from all industries increased 137 per cent in Canada in the period 1954-1965, compared to 76 per cent in the United States. Even with this comparatively strong growth pattern, Canadian per capita shipments of toys and games from all industries, at \$2.76 by 1965, were only 42 per cent of the United States figure of \$6.54.

B. REGIONAL LOCATION OF DOMESTIC MARKET

No information is published on the relative consumption of toys and games by regions in Canada. However by considering disposable income statistics, which are published by regional distribution, an attempt has been made in Table 20 to estimate consumption in various provinces. These estimates do not take into account regional market characteristics and other elements that influence the toy and game market.

TABLE 20

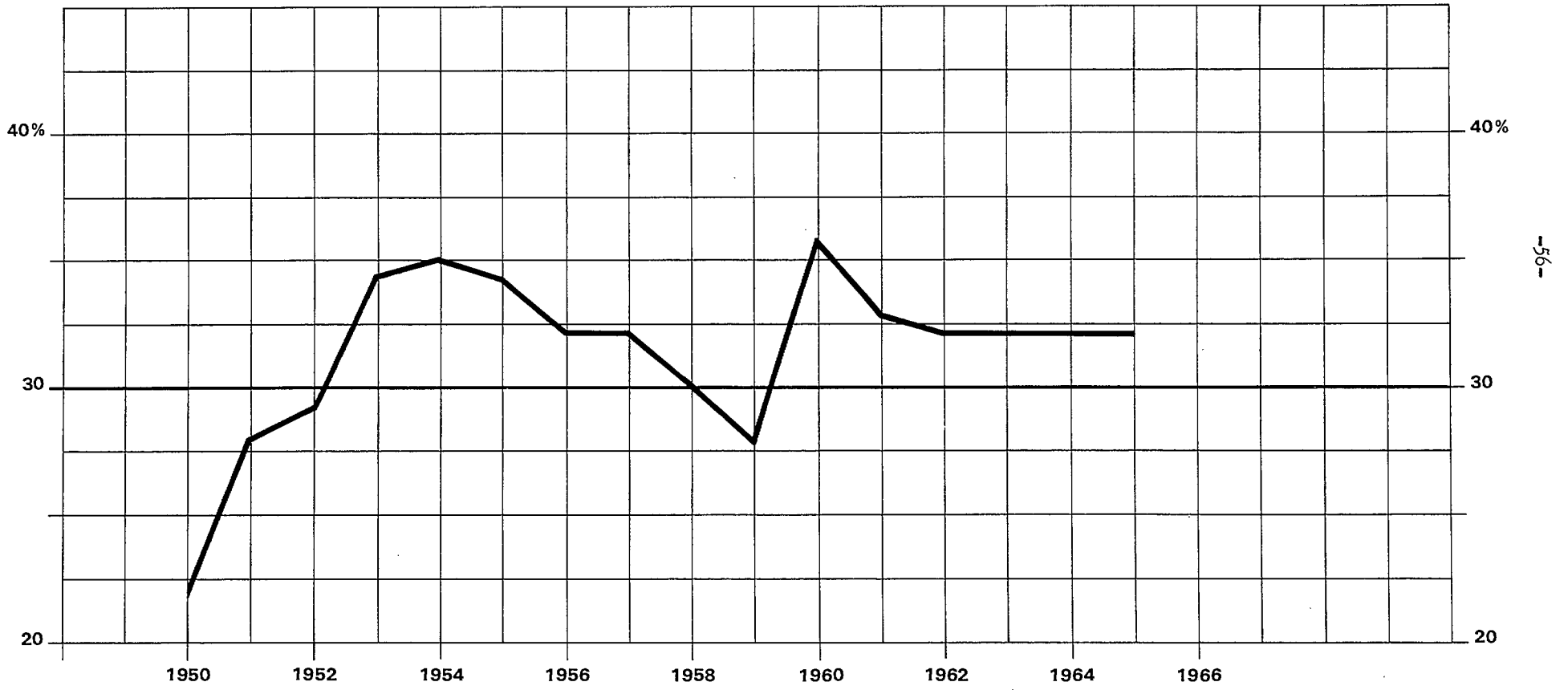
REGIONAL POPULATION, DISPOSABLE INCOME
AND TOY AND GAME MARKETS: CANADA - 1965

	Population*	Disposable Income*	Estimated Proportion of Canadian Toy and Game Market
	Per Cent	Per Cent	\$'000
Newfoundland	2.5	1.6	1,200
Prince Edward Island	0.5	0.4	300
Nova Scotia	3.8	3.0	2,250
New Brunswick	3.1	2.3	1,720
Quebec	28.9	25.5	19,120
Ontario	34.8	39.0	29,250
Manitoba	4.8	4.8	3,600
Saskatchewan	4.8	4.9	3,680
Alberta	7.3	7.5	5,620
British Columbia	9.4	10.6	7,949
Other Regions	0.1	0.4	300
	100	100	74,989

*Source: D.B.S. Catalogue No. 13-201 "National Accounts"

CHART 8

IMPORTS OF TOYS AND GAMES AS A PERCENTAGE OF TOTAL MARKET



-56-

C. PROPORTION OF DOMESTIC MARKET SUPPLIED BY DOMESTIC MANUFACTURERS: TRENDS IN IMPORTS

Of the total market for toys and games in Canada, domestic manufacturers supply approximately 70 per cent.

The value of imports reached \$23.9 million in 1965, an increase of 157 per cent since 1954 (Table 21). In the United States, the value of imported toys and games rose by 482 per cent in the same period. In 1965, imports of \$229 million accounted for 16 per cent of the total United States market as against \$39 million or 6 per cent of the market in 1954. Additional details on the United States market for toys and games appear in Appendix 2A.

TABLE 21

IMPORTS OF TOYS AND GAMES AS A PROPORTION OF TOTAL CANADIAN MARKET 1950 - 1965

	TOTAL IMPORTS	PROPORTION OF TOTAL CANADIAN MARKET
	\$000	Per Cent
1950	4,527	22
1951	6,304	28
1952	7,664	29
1953	10,050	34
1954	9,293	35
1955	10,081	34
1956	11,141	32
1957	11,757	32
1958	12,310	30
1959	12,569	28
1960	17,911	36
1961	18,386	34
1962	19,935	32
1963	20,489	32
1964	21,863	32
1965	23,904	32

A major part of the imports of toys and games entering Canada has come from the United States, whose share of the total was 41 per cent in 1966.

The three other countries that ship significant amounts of toys and games to Canada are Japan, Hong Kong and Britain. In 1966 their shares of the total imports were 24 per cent, 15 per cent and 13 per cent as indicated in Table 22.

TABLE 22

PROPORTION OF IMPORTS OF TOYS AND GAMES TO CANADA
BY COUNTRIES 1964 - 1966

<u>COUNTRY</u>	1964	1965	1966	1966
	- Per Cent -			\$000
UNITED STATES	44	42	41	9,510
JAPAN	24	23	24	5,531
HONG KONG	13	15	15	3,424
UNITED KINGDOM	13	13	13	3,136
ITALY	.8	.1	2	477
WEST GERMANY	3	.4	2	454
AUSTRALIA	.3	.1	.3	66
AUSTRIA	.1	2	.1	21
ALL OTHERS	2	4	3	723
	100	100	100	23,342

D. EXPORTS

Exports of Canadian toys and games grew very rapidly between 1954 and 1965. The value of exports, which was only \$200,000 in 1954, increased to \$3.2 million in 1965, or 6 per cent of all industries shipments. United States

exports of toys and games increased by 139 per cent in the period, amounting to \$33.4 million or about 3 per cent of all industries shipments in 1965.

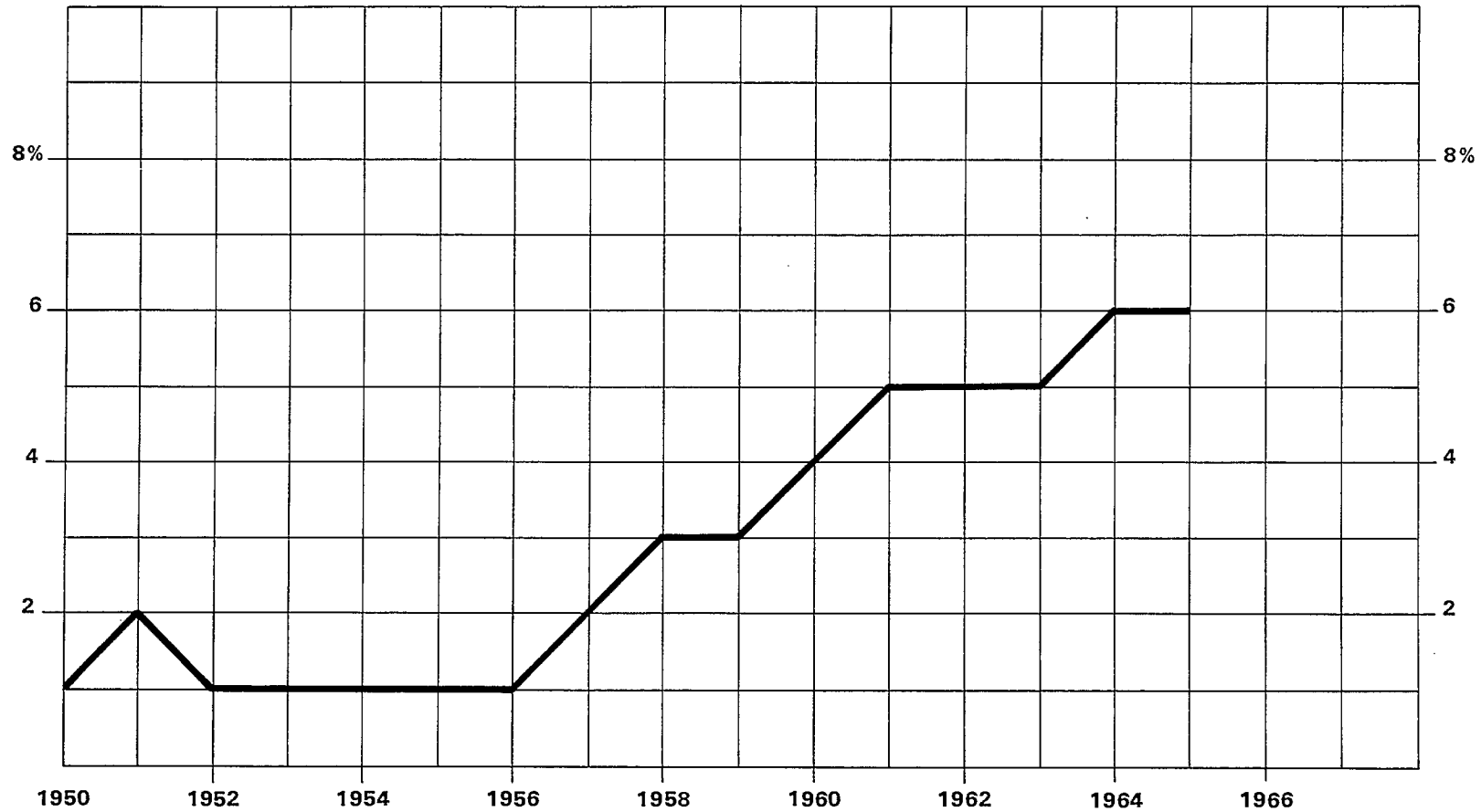
TABLE 23

CANADIAN EXPORTS AS A PROPORTION OF SHIPMENTS OF TOYS
AND GAMES FROM ALL INDUSTRIES 1950 - 1965

	Total Exports \$000	Proportion of Shipments of Toys and Games from All Industries Per Cent
1950	254	1
1951	368	2
1952	231	1
1953	236	1
1954	186	1
1955	234	1
1956	247	1
1957	426	2
1958	817	3
1959	1,031	3
1960	1,324	4
1961	2,044	5
1962	2,299	5
1963	2,533	5
1964	3,197	6
1965	3,213	6

CHART 9

CANADIAN EXPORTS OF TOYS AND GAMES AS A PROPORTION OF SHIPMENTS OF TOYS AND GAMES FROM ALL INDUSTRIES



Fifty per cent of Canadian exports were shipped to the United States in 1966. In addition substantial quantities of Canadian-made toys and games were purchased by buyers in Britain and Australia. This is shown in Table 24. Information on exports of products by countries appears in Appendix 4.

TABLE 24

PROPORTION OF CANADIAN EXPORTS OF TOYS AND GAMES BY COUNTRIES -
1964 - 1966

COUNTRY	1964	1965	1966	1966
	- Per Cent -			\$000
United States	52	50	50	1,773
United Kingdom	19	24	28	999
Australia	13	13	7	240
Finland	1	1	3	94
France	1	.7	1	51
Netherlands	.3	2	1	50
Italy	.1	.3	.5	16
Switzerland	.1	.1	.5	16
West Germany	2	2	.4	14
All Others	11	7	8	267
	100	100	100	3,520

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APPENDICES

TOY AND GAME INDUSTRY - CANADA

PRINCIPAL STATISTICS: 1926 - 1966

	Estab- lish- ments	Employees	Production \$000	Value of Shipments (Own Manu- facture) \$000	Value of Shipments (Total Activity) \$000	Value of Ship- ments of Toys and Games from all Industries \$000
1926	13	144	479	-	-	-
1928	10	129	430	-	-	-
1930	9	88	235	-	-	-
1932	12	206	516	-	-	-
1933	12	152	404	-	-	-
1937	13	282	794	-	-	-
1939	13	348	994	-	-	-
1941	19	547	1,466	-	-	-
1942	28	678	1,942	-	-	-
1943	45	975	2,887	-	-	-
1944	51	1,230	3,956	-	-	-
1945	56	1,428	4,810	-	-	-
1946	50	1,456	5,609	-	-	-
1947	47	1,203	4,212	-	-	-
1948	45	1,086	5,462	-	-	-
1949	56	1,448	8,051	-	-	-
1950	56	1,624	9,446	-	-	16,140
1951	53	1,432	9,617	-	-	16,286
1952	58	1,484	10,415	-	-	18,432
1953	55	1,551	11,369	-	-	19,537
1954	52	1,337	10,873	10,928	-	17,666
1955	56	1,405	12,133	12,311	-	19,951
1956	67	1,741	15,834	15,444	-	23,403
1957	67	2,133	-	18,682	-	25,275
1958	70	2,186	21,549	21,279	-	29,028
1959	69	2,634	24,156	25,148	-	32,599
1960	72	2,799	25,320	25,379	-	33,055
1961	73	3,037	29,482	29,614	31,391	37,132
1962	76	3,427	34,853	33,965	37,228	43,666
1963	79	3,328	38,167	37,921	42,237	46,734
1964	81	3,441	41,479	40,907	47,204	50,542
1965	81	3,567	44,999	43,927	49,624	54,298
1966*	81	3,924	49,847	49,810	55,067	57,008

* Preliminary Data.

TOY AND GAME INDUSTRY - UNITED STATES

PRINCIPAL STATISTICS 1950 - 1965

	Establish- ments	Employ- ees	Produc- tion \$'000	Value of Shipments \$'000	Value of Toys, Games Shipments from all Industries			Total Markets \$'000	Exports as a Propor- tion of all Industries Shipments	Imports as a Propor- tion of Total Market
					Exports \$'000	Imports \$'000	Per Cent		Per Cent	
1950	-	-	-	-	-	8,597	18,904	-	-	-
1951	-	-	-	-	-	10,072	18,009	-	-	-
1952	-	-	-	-	-	9,670	23,055	-	-	-
1953	-	-	-	-	-	14,077	31,347	-	-	-
1954	1,430	59,639	611,506	613,746	602,047	13,974	39,342	627,415	2	6
1955	-	67,057	707,780	696,536	694,070	14,327	53,047	732,415	2	7
1956	-	71,152	770,180	756,196	723,637	16,800	73,693	780,530	2	9
1957	-	70,655	737,026	733,530	700,407	18,038	80,986	763,355	2	11
1958	1,397	61,540	783,500	776,418	756,838	18,618	73,411	811,631	2	9
1959	-	64,600	843,890	842,243	817,426	18,087	94,651	893,990	2	10
1960	-	65,247	904,073	888,815	844,927	18,129	108,411	935,209	2	11
1961	-	70,943	1,015,750	998,546	949,416	19,632	115,430	1,045,214	2	11
1962	-	70,677	1,092,000	1,063,142	982,203	18,298	151,126	1,115,031	2	13
1963	1,271	72,590	1,141,770	1,122,080	1,036,976	18,262	175,043	1,193,757	2	15
1964	-	72,314	1,191,390	1,179,980	1,114,800	22,290	201,995	1,294,505	2	16
1965	-	79,054	1,357,237	1,326,138	1,268,268	33,453	229,346	1,464,161	3	16

VALUE OF TOYS AND GAMES SHIPMENTS BY PRODUCTS FROM ALL INDUSTRIES: UNITED STATES 1954 - 1958 - 1963

	1954		1958		1963	
	\$ Millions	Per Cent	\$ Millions	Per Cent	\$ Millions	Per Cent
1. Toys & Games	426.7	70.9	553.6	73.1	796.4	76.8
1. Plastic Toys, other than those listed	83.4	13.8	114.5	15.1	211.1	20.5
2. Metal Toys, other than those listed	83.2	13.8	72.4	9.6	81.2	7.8
3. Wooden Toys, other than those listed	31.2	5.2	38.6	5.1	46.0	4.4
4. Mechanical Toys except trains	14.7	2.5	33.8	4.5	62.7	6.0
5. ToysTrains & Equipment	33.5	5.6	25.9	3.4	17.0	1.6
6. Model Construction Sets	16.6	2.7	18.8	2.5	42.6	4.1
7. Stuffed Toy Animals	31.1	5.2	39.6	5.2	42.8	4.1
8. Structural Toys	8.5	1.4	6.2	0.8	6.7	0.7
9. Parts for Toys & Games	9.8	1.6	5.3	0.7	12.3	1.2
10. Miscellaneous Toys & Games	114.7	19.0	198.5	26.2	274.0	26.4
2. Dolls	110.1	18.3	130.5	17.3	157.7	15.2
1. Dolls, complete (except rubber dolls)	41.5	7.0	49.6	6.5	13.8	1.3
2. Doll Carriages & Carts	8.2	1.3	8.1	1.1	10.1	0.9
3. Doll Clothes & Doll Parts	25.1	4.2	33.1	4.4	29.2	2.8
4. Rubber Dolls	28.0	4.7	12.6	1.7	82.6	8.0
5. Miscellaneous Dolls	7.3	1.2	27.1	3.6	22.0	2.1
3. Children's Vehicles (except Bicycles)	65.2	10.8	72.9	9.6	82.7	8.0
1. Velocipedes & Tricycles (including chain-driven Tricycles)	16.7	2.8	18.2	2.4	20.8	2.1
2. Strollers	6.5	1.1	11.6	1.5	12.6	1.2
3. Baby Carriages	8.5	1.4	7.7	1.0	7.4	0.7
4. Children's Wagons	6.9	1.2	7.7	1.0	8.6	0.8
5. Baby Walkers	4.7	0.8	3.5	0.5	4.4	0.4
6. Sleds	1.4	0.2	3.3	0.4	5.3	0.5
7. Parts for Vehicles sold separately	3.2	0.5	1.9	0.3	2.2	0.2
8. Children's Miscellaneous Vehicles (including scooters, children's autos)	17.3	2.8	19.2	2.5	21.5	2.1
TOTALS	602.0	100.0	756.8	100.0	1,037.0	100.0

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Appendix 3.

TOY AND GAME INDUSTRY STATISTICS FOR SELECTED COUNTRIESWEST GERMANY

					Exports as a pro- portion of Prod- uction	Imports as a pro- portion of Total Market	Employees	Produc- tion per Employee	Per Capita Consump- tion	Population 000
	Production	Exports	Imports	Total Market	- Per Cent -			\$	\$	
- \$ Millions -										
1951	42.6	17.8	0.1	24.9	41	3	13,500	3,155	.49	50,528
1952	43.5	18.8	0.5	25.2	43	2	13,400	3,246	.50	50,859
1953	53.9	25.2	0.5	29.2	47	2	15,500	3,477	.57	51,350
1954	62.8	33.2	0.9	30.5	53	3	22,200	2,829	.59	51,880
1955	74.1	36.5	1.4	39.0	49	4	23,500	3,153	.74	52,382
1956	82.3	37.2	1.9	47.0	45	4	21,900	3,758	.89	53,008
1957	88.8	36.2	4.1	56.7	41	7	22,400	3,964	1.06	53,656
1958	92.8	35.2	7.5	65.1	38	12	22,300	4,161	1.20	54,292
1959	96.8	35.4	8.7	70.1	37	12	21,700	4,461	1.28	54,876
1960	108.8	39.5	10.4	79.7	36	13	22,100	4,923	1.44	55,433
1961	121.3	39.5	14.6	96.4	33	15	22,748	5,332	1.72	56,175
1962	130.0	41.8	17.8	106.0	32	17	23,169	5,611	1.86	56,938
1963	133.4	44.8	22.8	111.4	34	20	23,000	5,800	1.93	57,587
1964	150.7	51.6	28.5	127.6	34	22	23,540	6,402	2.19	58,266
1965	172.7	55.2	40.1	157.6	32	25	24,506	7,047	2.67	59,012
1966	181.0	58.7	46.0	168.3	32	27	24,850	7,284	2.82	59,638
1967	186.4	65.8	45.1	165.7	35	27	23,700	7,865	2.75	60,288

TOY AND GAME INDUSTRY STATISTICS FOR SELECTED COUNTRIES

FRANCE

					Exports as a pro- portion of Prod- uction	Imports as a pro- portion of Total Market	Employees	Produc- tion per Employee	Per Capita Consump- tion	Population 000
	Production	Exports	Imports	Total Market	- Per Cent -			\$	\$	
	- \$ Millions -									
1957	49.2	5.3	1.4	45.3	11	3	-	-	1.01	44,563
1958	51.6	7.0	1.4	46.0	14	3	16,800	3,071	1.02	45,105
1959	52.8	9.1	1.7	45.4	17	4	16,500	3,200	1.00	45,464
1960	56.9	10.0	2.8	49.7	18	6	16,200	3,512	1.08	45,904
1961	64.8	10.1	6.1	60.8	16	10	16,000	4,050	1.31	46,422
1962	81.8	8.0	13.1	86.9	10	15	16,000	5,112	1.83	47,573
1963	88.6	10.0	12.6	91.2	11	14	16,500	5,370	1.90	48,133
1964	92.8	13.0	14.0	93.8	14	15	17,000	5,458	1.93	48,690
1965	105.0	14.0	21.4	112.4	13	19	17,000	6,176	2.29	49,150
1966	106.9	14.6	24.4	116.7	14	21	17,500	6,108	2.35	49,650
1967	117.3	16.3	32.4	133.4	14	24	18,000	6,517	2.66	50,082
<u>JAPAN</u>										
1958	100.0	61.5	-	38.5	62	-	17,900	5,580	.42	91,767
1959	125.0	77.2	-	47.8	62	-	18,000	6,944	.52	92,641
1960	145.5	90.5	0.2	55.2	62	-	18,000	8,083	.59	93,419
1961	139.0	79.9	1.9	61.0	57	3	18,200	7,637	.65	94,287
1962	145.0	88.6	4.0	60.4	61	7	18,500	7,837	.63	95,181
1963	158.0	90.1	3.0	70.9	57	4	19,000	8,316	.74	96,156
1964	170.0	110.0	5.0	65.0	65	8	19,000	8,947	.67	97,182
1965	186.3	132.5	5.2	59.0	71	9	19,500	9,553	.60	98,282
1966	210.0	145.0	7.0	72.0	69	10	19,500	10,769	.73	99,220
1967	230.5	152.5	-	-	66	-	20,000	11,525	-	100,243

TOY AND GAME INDUSTRY STATISTICS FOR SELECTED COUNTRIESEAST GERMANY

					Exports as a pro- portion of Prod- uction	Imports as a pro- portion of Total Market	Employees	Produc- tion per Employee	Per Capita Consump- tion	Population 000
	Production	Exports	Imports	Total Market	- Per Cent -	\$		\$		
	- \$ Millions -				- Per Cent -			\$	\$	
1957	27.5	-	-	-	-	-	-	-	-	17,410
1958	33.8	-	-	-	-	-	-	-	-	17,311
1959	44.5	-	-	-	-	-	-	-	-	17,285
1960	50.3	10.0	-	-	20	-	-	-	-	17,188
1961	59.1	16.0	-	-	27	-	-	-	-	17,079
1962	69.4	18.5	-	-	27	-	-	-	-	17,136
1963	78.1	23.3	-	-	30	-	-	-	-	17,181
1964	85.0	26.4	-	-	31	-	-	-	-	17,003
1965	89.1	35.6	-	-	40	-	-	-	-	17,039
1966	96.3	38.5	-	-	40	-	-	-	-	17,071
1967	115.0	45.0	-	-	39	-	-	-	-	17,089

TOY AND GAME INDUSTRY STATISTICS FOR SELECTED COUNTRIESUNITED KINGDOM

					Exports as a pro- portion of Prod- uction	Imports as a pro- portion of Total Market	Employees	Produc- tion per Employee	Per Capita Consump- tion	Population 000
	Production	Exports	Imports	Total Market	- Per Cent -			\$	\$	
	- \$ Million ¹⁰ -									
1957	105.0	19.7	7.1	92.4	19	8	31,000	3,387	1.79	51,657
1958	104.8	20.1	7.8	92.5	19	8	30,000	3,493	1.78	51,870
1959	106.0	20.0	11.2	97.2	19	12	30,000	3,533	1.86	52,157
1960	112.8	26.1	15.8	102.5	23	15	27,000	4,177	1.95	52,559
1961	115.5	27.5	15.8	103.8	24	15	27,500	4,200	1.96	52,941
1962	117.6	28.0	22.4	112.0	24	20	27,500	4,276	2.09	53,458
1963	127.4	32.9	23.6	118.1	26	20	29,000	4,393	2.19	53,797
1964	140.7	37.2	30.6	134.1	26	23	29,000	4,851	2.47	54,213
1965	166.4	41.8	30.8	155.4	25	20	30,000	5,547	2.85	54,595
1966	182.3	45.1	38.1	175.3	25	22	30,000	6,077	3.18	54,965
1967	177.9	51.4	37.8	164.3	29	23	30,000	5,930	2.97	55,350
<u>ITALY</u>										
1961	-	6.7	15.9	-	-	-	-	-	-	50,045
1962	51.2	7.5	20.0	63.7	15	31	-	-	1.27	50,339
1963	72.0	9.4	23.4	86.0	13	27	-	-	1.70	50,659
1964	83.0	10.2	26.3	99.1	12	27	-	-	1.94	51,100
1965	-	11.5	32.1	-	-	-	-	-	-	51,574
1966	99.0	13.7	41.0	126.3	14	32	-	-	2.43	51,958
1967	107.5	14.6	48.4	141.3	14	34	-	-	2.69	52,439

TOY AND GAME INDUSTRY STATISTICS FOR SELECTED COUNTRIESAUSTRALIA

	Production	Exports	Imports	Total Market	Exports as a proportion of Production	Imports as a proportion of Total Market	Employees	Production per Employee	Per Capita Consumption	Population
	- \$ Millions -				- Per Cent -			\$	\$	000
1962	-	-	6.5	-	-	-	-	-	-	-
1963	-	-	7.6	-	-	-	-	-	-	-
1964	-	-	7.9	-	-	-	-	-	-	-
1965	-	.6	9.9	-	-	-	-	-	-	-
1966	8.8	.6	13.0	21.2	7	61	-	-	1.82	11,540
<u>SWITZERLAND</u>										
1960	-	.5	8.1	-	-	-	-	-	-	5,429
1961	-	-	-	-	-	-	-	-	-	5,496
1962	-	1.8	10.4	-	-	-	-	-	-	5,660
1963	-	2.2	11.8	-	-	-	-	-	-	5,770
1964	-	2.8	13.1	-	-	-	-	-	-	5,874
1965	-	2.8	15.1	-	-	-	-	-	-	5,945
<u>NORWAY</u>										
1962	1.2	-	-	-	-	-	-	-	-	3,626
1963	1.3	.5	2.9	3.7	38	78	-	-	1.01	3,655
1964	1.4	.7	3.7	4.4	50	84	-	-	1.20	3,681
1965	1.7	.8	4.0	4.9	47	82	-	-	1.32	3,711
1966	2.3	1.1	3.8	5.0	48	76	-	-	1.34	3,743

(Data in United States dollars)

Source: "Das Spielzeug" July, August, 1967, June 1968

EXPORTS OF TOYS AND GAMES - CANADA

Commodity Classification No:	1964					1965					1966				
	83055		83066		83079	83055		83066		83079	83055		83066		83079
	Total	Per Cent	Dolls, Doll Clothing & Parts	Toboggans	Games, Toys, Children's Vehicles & Parts	Total	Per Cent	Dolls, Doll Clothing & Parts	Toboggans	Games, Toys, Children's Vehicles & Parts	Total	Per Cent	Dolls, Doll Clothing & Parts	Toboggans	Games, Toys, Children's Vehicles & Parts
Countries	\$'000		\$'000	\$'000	\$'000		\$'000	\$'000	\$'000	\$'000		\$'000	\$'000	\$'000	
United States	1,665	52.2	26	581	1,058	1,600	49.9	3	484	1,113	1,773	50.3	3	513	1,257
United Kingdom	606	19.0	28	-	578	768	23.9	24	-	744	999	28.4	104	-	895
Australia	433	13.5	148	-	285	421	13.1	121	-	300	240	6.8	62	-	178
Finland	20	0.6	-	-	20	39	1.2	-	-	39	94	2.7	-	-	94
France	27	0.8	-	-	27	23	0.7	-	-	23	51	1.4	18	-	33
Netherlands	11	0.3	-	-	11	66	2.1	-	-	66	50	1.4	1	-	49
Italy	3	0.1	-	1	2	11	0.3	-	-	11	16	0.5	10	1	5
Switzerland	4	0.1	-	-	4	4	0.1	-	-	4	16	0.5	-	-	16
West Germany	58	1.8	-	-	58	55	1.7	-	-	55	14	0.4	1	-	13
Sweden	40	1.3	-	-	40	5	0.2	-	-	5	3	0.1	1	-	2
Others	329	10.3	64	1	264	220	6.8	49	-	171	264	7.5	30	-	234
TOTALS	3,197	100	266	583	2,348	3,213	100	197	484	2,531	3,520	100	230	514	2,776

EXPORTS OF TOYS AND GAMES - CANADA 1967

Commodity Classification No:	<u>83055</u>		<u>83066</u>		<u>83079</u>
	Total	Per	Dolls, Doll Clothing & Parts	Toboggans	Games Toys Children's Vehicles & Parts
	\$000	Cent	\$000	\$000	\$000
United States	2,567	63.0	5	664	1,898
United Kingdom	682	16.7	131	-	551
Australia	406	10.0	120	-	286
Finland	30	0.8	-	-	30
France	56	1.4	6	-	50
Netherlands	31	0.8	-	-	31
Italy	4	-	-	-	4
Switzerland	1	-	1	-	-
West Germany	25	0.6	-	-	25
Sweden	9	-	-	-	9
Others	268	6.6	28	2	238
	4,079	100	291	666	3,122

Appendix 5

IMPORTS OF TOYS AND GAMES - CANADA 1964

Commodity Classification No: 83701		83709	83711	83715	83716	83720	83733	83736	83739	83742	83748	83789	83792	83799		
Countries	Total	Per Cent	Playing Cards in Packs	Games Entertainment Equip. N.E.S.	Dolls	Doll Clothing & Parts	Stuffed Animals	Construction Toys & Parts	Mechanical Toys & Parts	Electric Toys & Parts	Toy Vehicles N.E.S.	Model Bldg. Kits	Toy Furniture & Household Equip.	Toys & Parts N.E.S.	Tricycles & Parts	Children's Vehicles & Parts
	\$000		\$000	\$000	\$000	\$000	\$000	\$000	\$000	\$000	\$000	\$000	\$000	\$000	\$000	\$000
United States	9,628	44.0	76	1,354	315	410	44	103	1,107	463	592	751	66	3,952	6	387
Japan	5,150	23.6	68	102	620	564	159	6	1,677	241	45	15	28	1,615	10	-
Hong Kong	2,920	13.3	35	85	494	283	13	41	303	97	58	4	22	1,485	-	-
United Kingdom	2,778	12.7	18	202	44	-	50	70	257	155	878	36	4	1,021	4	39
West Germany	581	2.7	1	20	15	2	29	5	214	15	25	2	4	249	-	-
France	66	0.3	1	34	4	-	-	1	1	-	3	-	-	20	-	2
Austria	12	0.1	8	-	-	-	-	-	-	-	-	-	-	3	-	1
Italy	182	0.8	2	4	17	5	1	10	11	11	-	-	-	82	32	7
Netherlands	111	0.5	-	14	91	-	-	-	-	-	-	-	-	5	-	1
Australia	74	0.3	-	-	-	-	36	-	-	-	-	-	-	38	-	-
Switzerland	19	0.1	12	-	5	-	-	-	-	-	-	-	-	2	-	-
Finland	2	-	-	-	-	-	-	-	-	-	-	-	-	2	-	-
Belgium	7	-	2	2	2	-	-	-	-	-	-	-	-	1	-	-
Spain	12	0.1	6	1	1	2	-	-	-	-	-	-	-	2	-	-
Other	321	1.5	3	11	14	-	5	6	11	-	15	2	9	245	-	-
TOTAL	21,863	100.0	232	1,829	1,624	1,266	337	242	3,581	982	1,616	810	133	8,722	52	437
	100.0		1.1	8.4	7.4	5.8	1.5	1.1	16.4	4.5	7.4	3.7	0.6	39.9	0.2	2.0

IMPORTS OF TOYS AND GAMES - CANADA 1965

Commodity Classification No.	83701 83709 83711 83715 83716 83720 83733 83736 83739 83742 83748 83789 83792 83799															
	Countries	Total	Per Cent	Playing Cards in Packs	Games Entertainment Equip. N.E.S.	Dolls	Doll Clothing and Parts	Stuffed Animals	Construction Toys and Parts	Mechanical Toys and Parts	Electric Toys and Parts	Toy Vehicles N.E.S.	Model Bldg. Kits	Toy Furniture & Household Equip.	Toys and Parts N.E.S.	Tricycles and Parts
	\$000		\$000	\$000	\$000	\$000	\$000	\$000	\$000	\$000	\$000	\$000	\$000	\$000	\$000	\$000
United States	10,161	42.6	95	1,545	136	467	42	105	1,115	560	571	688	73	4,077	4	683
Japan	5,536	23.2	49	91	774	671	192	8	1,864	258	26	14	19	1,567	3	-
Hong Kong	3,686	15.4	43	82	744	408	12	18	550	133	143	13	30	1,508	-	2
United Kingdom	3,011	12.6	7	186	44	2	24	133	437	232	927	50	1	937	4	27
Austria	582	2.4	4	23	9	-	25	5	238	21	40	2	5	210	-	-
West Germany	93	0.4	-	40	12	2	-	1	5	-	1	-	-	32	-	-
France	32	0.1	14	2	-	-	-	-	-	2	-	-	-	13	-	1
Italy	293	1.2	1	-	-	-	-	-	25	38	17	-	1	62	49	16
Switzerland	4	-	1	-	-	-	-	-	-	-	-	-	-	3	-	-
Finland	1	-	-	-	-	-	1	-	-	-	-	-	-	-	-	-
Belgium	10	-	4	4	-	-	-	-	-	-	-	-	-	2	-	-
Australia	31	0.1	-	-	-	-	31	-	-	-	-	-	-	-	-	-
Netherlands	21	0.1	-	14	2	-	-	-	-	-	-	-	-	4	-	1
Spain	18	0.1	12	2	2	-	-	-	-	-	-	-	-	2	-	-
Other	425	1.8	1	11	27	1	21	33	34	5	11	2	4	274	-	1
	23,904	100.0	235	2,010	1,820	1,551	348	303	4,268	1,249	1,736	769	133	8,691	60	731
	100.0		0.9	8.4	7.6	6.5	1.5	1.3	17.8	5.2	7.3	3.2	0.6	36.3	0.3	3.1

APPENDIX 5 (Cont'd)

IMPORTS OF TOYS AND GAMES - CANADA - 1966

Commodity Classification No.:	83701	83709	83711	83715	83716	83720	83733	83736	83739	83742	83748	83789	83792	83799		
Countries	Total \$000	Per Cent	Playing Cards in Packs \$000	Games & Entertain- ment Eqpt. N. E. S. \$000	Dolls \$000	Doll Clothing & Parts \$000	Stuffed Animals \$000	Construct- ion Toys & Parts \$000	Mechani- cal Toys & Parts \$000	Electric Toys & Parts \$000	Toy Vehicles N. E. S. \$000	Model Bldg. Kits \$000	Toy Furniture & House- hold Parts \$000	Toys & Parts N. E. S. \$000	Tricycle & Parts \$000	Children's Vehicles & Parts N. E. S. \$000
United States	9,510	40.9	69	1,620	97	398	33	102	897	515	482	886	33	3,958	46	374
Japan	5,531	23.7	29	185	539	173	252	4	1,999	557	67	7	24	1,690	5	-
Hong Kong	3,424	14.7	57	83	499	234	2	21	668	137	145	6	32	1,540	-	-
United Kingdom	3,136	13.4	8	256	49	1	44	158	517	248	1,075	57	1	689	-	33
Austria	21	0.1	9	2	1	-	1	-	-	3	-	-	-	5	-	-
West Germany	454	1.9	4	28	9	-	16	8	133	28	22	9	18	179	-	-
France	84	0.4	-	51	6	-	-	-	2	-	-	-	-	25	-	-
Italy	477	2.0	7	20	86	-	1	2	13	13	7	1	-	55	67	205
Switzerland	1	-	-	-	-	-	-	-	-	-	-	-	-	1	-	-
Netherlands	58	0.2	-	38	-	-	-	1	-	-	1	-	-	12	-	6
Finland	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Australia	66	0.3	-	-	-	-	35	-	1	-	14	-	-	16	-	-
Belgium	11	-	5	-	2	-	-	-	1	-	2	-	-	1	-	-
Spain	25	0.1	3	3	4	-	-	-	1	-	2	1	-	6	5	-
Other	544	2.3	4	22	19	1	16	17	43	8	23	4	1	356	-	30
	23,342	100.0	195	2,308	1,311	807	400	313	4,275	1,509	1,840	971	109	8,533	123	648
	100.0		0.8	9.9	5.6	3.5	1.7	1.3	18.3	6.5	7.9	4.2	0.5	36.5	0.5	2.8

IMPORTS OF TOYS AND GAMES - CANADA - 1967

Commodity Classification No:		83701	83709	83711	83715	83716	83720	83733	83736	83739	83742	83748	83789	83792	83799	
Countries	Total \$000	Per Cent	Games and Entertainment Equip. N.E.S.		Doll Clothing & Doll Parts		Stuffed Animals	Con-struction Toys & Parts	Mech-anical Toys & Parts	Elec-trical Toys & Parts	Toy Vehic-les N.E.S.	Model Build-ing Kits	Toy Furni-ture & House-hold Equip-ment	Toys & Parts N.E.S.	Tri-cycles & Parts	Child-ren's Vehicles & Parts N.E.S.
			Play-ing Cards \$000	N.E.S. \$000	Dolls \$000	Doll Parts \$000	\$000	\$000	\$000	\$000	\$000	\$000	\$000	\$000	\$000	\$000
United States	10,260	37.6	94	1,888	165	359	49	79	834	627	435	1,005	49	4,295	131	250
Japan	5,983	21.9	48	130	618	93	259	2	2,278	666	114	7	33	1,729	1	5
Hong Kong	4,230	15.5	46	119	788	156	17	24	737	154	189	25	60	1,915	-	-
United Kingdom	3,892	14.3	9	256	48	4	35	216	605	279	1,331	50	3	1,042	-	14
Austria	26	0.1	14	2	1	-	4	-	-	-	-	-	-	5	-	-
West Germany	557	2.0	-	36	11	-	19	1	169	66	17	9	12	214	-	3
France	120	0.4	1	44	14	1	-	6	5	1	-	-	-	47	-	-
Italy	946	3.5	10	24	153	-	1	1	27	11	17	23	-	154	87	438
Switzerland	11	-	-	1	5	-	-	-	-	-	-	-	-	5	-	-
Netherlands	78	0.3	-	62	1	-	-	1	-	-	-	-	-	12	-	2
Finland	32	0.1	-	-	-	-	-	-	-	-	-	-	-	32	-	-
Australia	101	0.4	-	-	1	-	60	-	-	1	-	-	-	39	-	-
Belgium	15	-	8	-	-	-	-	-	-	-	-	-	-	7	-	-
Sweden	61	0.2	-	14	1	-	-	-	7	-	-	-	-	39	-	-
Others	975	3.7	6	39	191	2	37	31	50	3	44	12	-	529	3	28
	27,287	100.0	236	2,615	1,997	615	481	361	4,712	1,808	2,147	1,132	157	10,064	222	740
	100.0	-	0.9	9.6	7.3	2.2	1.8	1.3	17.3	6.6	7.9	4.1	0.6	36.9	0.8	2.7

A LIST OF TOYS AND GAMES CLASSIFIED
TO THE TOY AND GAME INDUSTRY

GAME BOARDS AND SETS

Bingo Sets
Checker and chess sets
Croquet sets
Dart games
Domino sets
Poker sets
Shuffleboards
Game boards and sets, n.e.s.

ENTERTAINMENT EQUIPMENT, n.e.s.

Puzzles
Jigsaw puzzles
Puzzles, n.e.s.
Riddles, tricks and jokes
Carnival and entertainment equipment
Paper costumes and hats
Entertainment equipment, n.e.s.

GAMES (Excl. amusement park and playground games) n.e.s.

TOYS

DOLLS AND PARTS

- Dolls, complete
 - Dolls, complete, plastic
 - Dolls, complete, rubber
 - Dolls, complete, n.e.s.
- Doll clothing and shoes
- Parts for dolls
 - Hair and wigs, dolls'
 - Parts for dolls, n.e.s.

MECHANICAL AND ELECTRIC TOYS AND PARTS

- Toys, mechanical, n.e.s.
 - Doll carriages and prams
 - Toys, vehicles (cars, trucks, etc.)
 - Toys, mechanical, n.e.s.
- Toys, electric, n.e.s.
 - Road race sets, electric
 - Trains, toy, electric
 - Toys, electric, n.e.s.
- Parts for mechanical and electric toys
 - Parts for mechanical toys
 - Parts for electric toys

NON-MECHANICAL TOYS

- Construction toys
 - Building bricks
 - Construction toys, n.e.s.
- Model building kits
 - Model aeroplane kits
 - Model automobile kits
 - Model building kits, n.e.s.
- Paint-by-number kits
- Chemistry sets (children's)
- Stuffed animals (toys)
- Toy guns and pistols
 - Gun and holster sets, toy
 - Toy guns and pistols, n.e.s.
- Toy furniture and household equipment
 - Toy brooms, brushes and mops
 - Doll furniture
 - Blackboards, children's
 - Toy furniture and household equipment, n.e.s.
- Non-mechanical toys, n.e.s.

CHILDREN'S PLAY COSTUMES, DECORATIVE ACCESSORIES AND PARTS

TOYS, n.e.s.

Wooden toys, n.e.s.

Metal toys, n.e.s.

Plastic toys

Plastic toys, inflatable

Plastic toys, n.e.s.

Rubber toys (incl. inflatable)

Rubber ballons

Rubber playballs

Rubber toys, n.e.s. (incl. inflatable)

Toys, n.e.s.

CHILDREN'S VEHICLES

CHILDREN'S WHEELED VEHICLES

Children's pedal-type wheeled vehicles

Bicycles, with wheels under 14" in diameter

Tricycles, children's

Pedal bikes and pedal cars, three-wheeled

Pedal cars, autos and jeeps, four-wheeled

Children's pedal-type wheeled vehicles, n.e.s.

Waggon

Scoters

Walkers

Children's wheeled vehicles, n.e.s.

CHILDREN'S SNOW VEHICLES

Sleighs and sleds, children's

Toboggans

Children's snow vehicles, n.e.s.

CANADIAN TARIFFS ON ITEMS AFFECTING THE TOY INDUSTRY
 (The new rates, agreed in the 1967 Kennedy Round negotiations, are the final rates effective January 1, 1972. Those concessions which are not implemented in one step will be progressively reduced annually until the final rates are reached)

APPLICABLE RATES
 (Per cent unless otherwise indicated)

A. TOYS AND GAMES

	British Preferential	Most Favored Nation		General
		Old	New	
19900-1 Puzzle Pictures	15	22-1/2	17-1/2	40
62410-1 Toy Air Balloons Toy Novelties of Paper, such as cradles, doll carriages, shoes, boats, etc.	10	30	20	40
Toy Printing Sets				
Toys, all kinds, n.o.p.				
Balls of all kinds, n.o.p.				
Games, as toys				
Children's Marbles				
62410-3 Mechanical Toys, all kinds, n.o.p.	-	25	20	-
62415-1 Toy Pistols or Guns, of metal, which produce sparks	5	25	20	40
Toys, mechanical, of metal Juvenile construction sets of metal or rubber, stamped, punched or molded and connections therefor, parts of the foregoing...				
62420-1of metal	Free	25	20	40
62421-1of rubber	Free	20	20	40

A. TOYS AND GAMES Cont'd.

62425-1 Toy electric train sets, transformers, parts and accessories for use therewith (under Australian Treaty--toy representing Kangaroos or Koala Bears Free)

62900-1 Toy Parasols

B. DOLLS

19900-1 Doll outfits put up in cardboard boxes, and consisting of paper dolls, paper dresses therefor and paper dress patterns and other articles made from paper

43930-1 Doll Carriages, of a type suitable for carrying infants

62405-1 Dolls

Dolls Dressed

Finished parts of, such as arms, legs, heads and body blanks

Dolls, head novelties (according to materials)

Dolls made from rubber sponge

Dolls of all kinds and materials. Dolls, stock-inette, "chases" used for teaching children on playground how to sew and also how to dress and undress babies. (No provision for Free entry)

British Preferential	Most Favored Nation		General
	Old	New	
5	20	20	40
20	25	20	35
15	22-1/2	17-1/2	35
15	22-1/2	17-1/2	35
10	25	20	40

B. DOLLS Cont'd.

62410-1 Doll Beds or Carriages; small blankets and other bedding for doll beds or doll carriages, designed as playthings for children and which cannot be adapted for practical use

Doll Carriages, small light carriages unsuitable for carrying infants

Doll Clothing, including hats, stockings, shoes, designed for use by children as playthings and for carrying infants

Doll houses of paper

C. CHILDREN'S VEHICLES

43900-1 Bicycles, n.o.p.

Tricycles, n.o.p.

43905-1 Bicycles, - of iron or steel, wholly or in part of nickel or electroplated, when imported by manufacturers of bicycles or tricycles, in their own factories, under regulations prescribed by the Minister

Tricycles, articles, iron & steel, wholly or in part of nickel or electro-plated for mfg. of

43920-1 Sleighs, n.o.p. and parts

43930-1 Children's Toy Waggon, express waggons

Children's carriages and sleds

British Preferential	Most Favored Nation		General
	Old	New	
10	30	20	40
20	25	25	30
Free	12-1/2	12-1/2	30
Free	22-1/2	22-1/2	30
Free	25	20	25
15	22-1/2	17-1/2	35

C. CHILDREN'S VEHICLES Cont'd

44606-1 Bicycle rims, steel,
not enamelled nor plated

50210-1 Bicycle rim strips
of maple not further
manufactured than bent to
shape and

50600-1 Bicycle rims of
wood, n.o.p.

61200-1 Bicycle Saddles

British Prefer- ential	Most Favored Nation		General
	Old	New	
Free	27-1/2	17-1/2	35
Free	12-1/2	12-1/2	15
15	20	15	25
15	20	20	30

Source: The Department of National Revenue publication "The Customs Tariffs and Amendments" and the Department of Finance publication "Canada Tariff Concessions Agreed in the Kennedy Round Negotiations under the General Agreement on Tariffs and Trade" June 1967.

UNITED STATES TARIFFS

(The new rates, agreed in the 1967 Kennedy Round negotiations, are the final rates effective January 1, 1972. Those concessions which are not implemented in one step will be progressively reduced annually until the final rates are reached)

U.S. Tariff Item <u>Abbreviated description of tariff wording</u>	<u>Most Favored Nation</u> Per cent unless otherwise indicated	
	<u>Old</u>	<u>New</u>
<u>TOYS AND GAMES</u>		
734.15 Chess, checkers, parchisi, backgammon darts and other games played on board of special design, all the foregoing games and parts thereof (including their boards); mah-jong, and dominoes; any of the foregoing games in combination with each other, or with other games, packaged together as a unit in immediate containers of a type used in retail sales; poker chips and dice	20	10
734.20 Game machines, including coin or disc operated game machines and including games having mechanical controls for manipulating the action and parts thereof:	9	5.5
734.25 Playing Cards	4¢ per pack + 2¢ per pack 4% ad. val. + 2% ad. val.	
735.20 Puzzles	20	10
Model trains, model airplanes, model boats, and other model articles, all the foregoing whether or not toys; and construction kits or sets for making or assembling such model articles:		
737.05 Models of inventions and of other improvements in the arts, to be used exclusively as models	Free	Free
737.07 Other models, and construction kits or sets:	16	8
Rail locomotives and rail vehicles; railroad and railway rolling stock; track, including switching track; rail depots, round houses, signal towers, water towers, and		

U.S. Tariff Item <u>Abbreviated description of tariff wording</u>	<u>Most Favored Nation</u> Per Cent unless otherwise indicated	
<u>TOYS AND GAMES (Cont'd)</u>	<u>Old</u>	<u>New</u>
737.07 other trackside structures; trolley buses and trolley-bus systems; cable-car systems; highway vehicles; ships and harbor structures; and airplanes and spacecraft; all the foregoing made to scale of the actual article at the ratio of 1 to 85 or smaller		
737.09 Construction kits or sets with construction units prefabricated to precise scale of the actual article	19	9.5
Toy figures of animate objects (except dolls) Not having a spring mechanism: Stuffed:		
737.25 Valued not over 10 cents per inch of height	28	28
737.30 Valued over 10 cents per inch of height	18	9
Not Stuffed:		
737.35 Wholly or almost wholly of metal	21	10.5
737.40 Other	35	17.5
Having a spring mechanism:		
737.45 Wholly or almost wholly of metal	24	12
737.50 Other	44	22
737.52 Toy books, including coloring books and books the only reading matter in which consists of letters, numerals, or descriptive words	Free	Free
737.55 Toy alphabet blocks; and toy building blocks, bricks, and shapes	21	10.5
737.60 Toy musical instruments	26	16

<u>U.S. Tariff Item</u> <u>Abbreviated description of tariff wording</u>	<u>Most Favored Nation</u> <u>Per Cent unless otherwise</u> <u>indicated</u>	
	<u>Old</u>	<u>New</u>
<u>TOYS AND GAMES (Cont'd)</u>		
737.65 Magic tricks, and practical joke articles	20	20
737.70 Confetti, paper spirals or streamers, party favors, noisemakers	20	10
Toys, and parts of toys, not specially provided for:		
737.80 Toys having a spring mechanism	44	22
737.90 Other	35	17.5
<u>DOLLS AND SUPPLIES</u>		
737.20 Dolls, and parts of dolls including doll clothing	35	17.5
732.40 Doll carriages, doll strollers, and parts thereof	35	17.5
<u>CHILDREN'S VEHICLES</u>		
Bicycles: Having both wheels not over 19 inches in diameter		
732.02 Valued not over \$6.25 each	30	15
732.04 Valued over \$6.25 but not over \$8.33-1/3 each	\$1.85 each	93.5¢ each
732.26 Other:	30	15
Parts of bicycles: Frames:		
732.30 Valued not over \$4.16-2/3	30	15
732.32 Valued over \$4.16-2/3 but not over \$8.33-1/3 each	\$1.25 each	62.5¢ each
732.34 Valued over \$8.33-1/3 each	15	7.5
732.36 Other parts of bicycles	30	15
Tricycles, scooters, waggons, pedal cars, and other wheeled goods (except skates), all the foregoing designed to be ridden by children, and parts thereof:		

<u>U.S. Tariff Item</u> <u>Abbreviated description of tariff wording</u>	<u>Most favored Nation</u> <u>Per Cent unless otherwise</u> <u>indicated</u>	
	<u>Old</u>	<u>New</u>
<u>CHILDREN'S VEHICLES</u>		
732.50 Chain-driven wheeled goods	9	4.5
732.50 Other	18	9
Baby carriages, baby strollers, and parts thereof:		
732.60 Of metal	15	7.5
Skis and ski equipment, snowshoes, sleds, toboggans, all the foregoing and parts thereof:		
734.95 Toboggans	10	5

Source: The United States Tariff Commission; T.C. Publication No. 222
"Tariff Schedules of the United States"

TRADE ASSOCIATIONS, PERIODICALS & INTERNATIONAL FAIRS

TRADE ASSOCIATIONS

- Canadian Toy Manufacturers Association, 67 Yonge Street, Toronto 1, Ontario
Mr. Walter Griffith, Secretary-Treasurer.
- Canadian Toy Importers Association, 184 Front Street, Toronto 1, Ontario.
- Canadian Toy Testing Council, Mrs. P.J. Pockock, 460 Crestview Road, Ottawa,
Ontario.
- Chess Federation of Canada, Department of Mathematics, University of
British Columbia, Vancouver 8, British Columbia.
- Canadian Smallwares and Toy Wholesalers Association, Toronto.
- Toy Manufacturers of America Inc., 200-Fifth Avenue, New York City, New York.
- The American Toy Institute, 200-Fifth Avenue, New York City, New York.
- Toy Wholesalers Association of America, 1514 Elmwood Avenue, Evanston, Illinois.
- United Federation of Doll Clubs, 12 Childs Road, Lexington, Massachusetts.
- Doll Supply Manufacturers Association, 313 West Old Country Road,
Hicksville, New York.
- United States Chess Federation, 80 East 11th Street, New York City,
New York.
- Chess League of America, 816 South Cecelia Street, Sioux City, Iowa.
- Hobby Industry Association of America Inc., 200-Fifth Avenue, New York City,
New York.
- Hobby Clubs of America, 410 Cathedral Parkway, New York City, New York.
- National Model Railway Association Inc., P.O. Box 1328, Station C,
Canton, Ohio.
- Train Collectors Association, 251 Dickson Avenue, Ben Avon, Pittsburgh,
Pennsylvania.
- International Association of Automotive Modelers, 8721 Robinhood Lane,
Tinley Park, Illinois.
- National Association of Rocketry, 11 West 42nd Street, New York City,
New York.
- Bicycle Institute of America, Inc., 122 East 42nd Street, New York City,
New York.
- National Bicycle Dealers Association, P.O. Box 228, 29025 Euclid Avenue,
Wickliffe, Ohio.

- Bicycle Wholesale Distribution Association Inc., 50-21 69th Street,
Woodside, New York.
- Association of American Playing Card Manufacturers, 420 Lexington Avenue,
New York City, New York.
- Chicago Playing Card Collectors Inc., 9645 South Leavitt Street,
Chicago, Illinois.
- European Toy Institute (Institute Europeene du Jouet), 19 Rue des
Chartreux, Brussels, Belgium
- European Federation of Toy Manufacturers, Retailers and Wholesalers
(Confederation Europeene des Fabricants Grossistes et
Detaillants de Jouets), Deinze, Belgium.
- British Toy Manufacturers Association, Regent House, 6th Floor,
89 Kingsway, London W.C.2 England.
- Toy and Game Manufacturers Association of Australia, c/o Chamber of
Manufacturers, 368 St. Kilda Road, Melbourne, Victoria
Australia.
- Verband Der Deutschland Spielwaren und Christbaumschmuck Industrie,
8500 Nurnberg 1, Koenigstrasse 13, West Germany.
- Verband Schweizrischer Spielwaren Fabrikanten, Meihok Strasse 36,
6000 Lucerne, Switzerland.
- Syndicate National des Jeux, Jouets, Articles de Fetes et Voitures
d'enfants, 93 Rue de Turenne, Paris 3, France.
- Sveriges Leksakshandlares Riksforbund, Post Box 3103, Stockholm, Sweden.
- Japan Internation Toy Fair Association, 14-11, 3-Chrome, Kotobuki, Taito-Ku,
Tokyo, Japan.

PERIODICALS

- "Toys and Playthings" Jonathan Publications Ltd., 146 Bates Road,
Montreal 26, Quebec.
- "Volume Retail Merchandizing" Fullerton-Weston Publications Ltd.,
93 Railside Road, Don Mills, Ontario.
- "Canadian Hobby-Craft Magazine" McLaughlin Publications, 121 Queen
Avenue, London, Ontario.
- "Playthings" Geyer-McAllister Publications Inc., 51 Madison Avenue,
New York City, New York.
- "Toys and Novelties" Haire Publishing Co., 111 Fourth Avenue, New York
City, New York.
- "Toy and Hobbyworld" United Publishing Co., 32-12th Street, N.E.,
Atlanta, Georgia.

PERIODICALS (Cont'd)

- "Toy Reporter" Toy Market Research, 331 Madison Avenue, New York City,
New York.
- "Toy Trader" 2112 Middlefield Street, Middleton, Connecticut.
- "Doll Talk" Kimport Dolls, P.O. Box 495, Independence, Missouri.
- "Hobby Happenings" Hobby Industry Association of America, 200-Fifth
Avenue, New York City, New York.
- "Hobbies" Lightner Publishing Corp., 1006 South Michigan Avenue,
Chicago 5, Illinois.
- "Hobbies to Enjoy" P.O. Box 2242, St. Louis, Missouri.
- "Hobby Prevue" Prevue Publications, 102-20 67th Drive, Forest Hills,
New York.
- "Hobby Times" P.O. Box 70, Parlin, New Jersey.
- "Craft, Model & Hobby Industry" Hobby Publications, 70 Duane Street,
New York City, New York.
- "Flying Models" Rajo Publications Inc., 215 Park Avenue South, New York
City, New York.
- "Model Airplane News" Air Age Inc., 551-Fifth Avenue, New York City,
New York.
- "Model Rocketeer" National Association of Rocketry, 11 West 42nd
Street, New York City, New York.
- "Railroad Magazine" Popular Publications Inc., 205 East 42nd Street,
New York City, New York.
- "Railroad Model Craftsman" Model Craftsman Publishing Corp., Ramsey,
New Jersey.
- "NMRA Bulletin" National Model Railway Association Inc., Post Box 1328,
Station C, Canton, Ohio.
- "Car Model" O.L.R. Publishing Co. Inc., 30 East 20th Street,
New York City, New York.
- "Model Car Science" Delta Magazines Inc., 171 Barrington Place, Los Angeles,
California.
- "Model Car Raceways" United Publishing Company, 32-12th Street, N.E.,
Atlanta, Georgia.
- "Chess Review" 134 West 72nd Street, New York City, New York.
- "Chess Life" United States Chess Federation, 80 East 11th Street, New
York City, New York.

PERIODICALS Cont'd

- "American Chess Bulletin" 150 Nassau Street, New York City, New York.
- "Chess Correspondent" Chess League of America, 816 South Cecelia Street,
Sioux City, Iowa.
- "Card Commentary" Association of American Playing Card Manufacturers,
420 Lexington Avenue, New York City, New York.
- "Toy Trader & Hobby Model" Trade Papers Ltd., Stanford House, 65-66
Turnhill Street, London, England.
- "Toys International" Trade News Ltd., Drummond House, 203 Geomer Street,
London N.W. 1, England.
- "Das Spielzeug" Meisenbach K.G., Druckhaus, Heinstrasse 18, Bamberg, Germany.
- "La Revue du Jouet" Revue Trimestrille, 46 Rue Ampere, Paris 16, France.

TRADE DIRECTORIES

- "Canadian Toy, Notion & Stationery Directory", Lloyd Publications of
Canada, 16 Bimrock Road, Scarborough, Ontario.
- "Annual Toy Fair Directory", Canadian Toy Manufacturers Association,
67 Yonge Street, Toronto 1, Ontario.
- "Toy Center Annual Directory", Helmsley-Spear Inc., 200-Fifth Avenue,
New York City, New York.
- "Toys & Novelties Directory", Haire Publishing Co. Inc., 111 Fourth
Avenue, New York City, New York.
- "NMRA Directory", National Model Railway Association Inc., Post Box 1328,
Station C, Canton, Ohio.
- "Model Car Racing Buyers Guide", David Publications Inc., 505 Park Avenue,
New York City, New York.
- "Doll Supply Manufacturers Association Directory", 135-24 Roosevelt Avenue,
Flushing 54, New York.

INTERNATIONAL FAIRS

Canadian Toy Fair: Canadian Toy Manufacturers Association, 67 Yonge Street,
Toronto 1, Ontario

1969 Feb. ²³⁻²⁹ 27 - Mar. ~~6~~ Montreal, Quebec.

Canadian Imported Toy Fair: Canadian Toy Importers Association, 184 Front
Street West, Toronto (Mr. Young: 368-8371)

Held same time and place as the above.

INTERNATIONAL FAIRS Cont'd

Pre Toy Show: Murray Black, Place Bonaventure, Montreal, Quebec.

1969 Jan. 13 - 16 Montreal, Quebec.

American Toy Fair: Toy Manufacturers of America, Inc., 200-Fifth Avenue, New York City, NY 10010.

1969 Mar. 2 - 5 New York City, New York.

Atlanta Toy Show: Southern Exposition Management Co., 6075 Roswell Road, Atlanta, Georgia.

1969 Apr. 11 - 15 & Oct. 24 - 28 Atlanta, Georgia.
1970 Apr. 3 - 6 Atlanta, Georgia.

Dallas Toy Show: South-Western Toy & Hobby Association, 3000 Trade Mart, Dallas, TX 75207.

1969 May 2 - 4 Dallas, Texas.

Hobby Industry Trade Show: Hobby Industry Association of America Inc., 200-Fifth Avenue, New York City, NY 10010.

1969 Feb. 2 - 6 Chicago, Illinois.

Indiana Hobby & Gift Show: P.O. Box 20189, Indianapolis, Indiana.

1968 Nov. 4 - 12 Indianapolis, Indiana.

United Federation of Doll Clubs: 12 Childs Road, Lexington, Massachusetts.

1969 Aug. 6 - 10 New Orleans, Louisiana

National Model Railway Association: P.O. Box 1328, Station C, Canton, OH 44708.

1969 Aug. Minneapolis, Minnesota

National Bicycle Dealers Association: P.O. Box 228, 29025 Euclid Avenue, Wickliffe, OH 44092.

1969 Feb. 2 Miami Beach, Florida.

International Toy & Trade Fair & International Bicycle & Motorcycle Show: G. Neuburger, 545-Fifth Avenue, New York City, NY 10017.

1969 Mar. 10 - 14 New York City, New York.

Philadelphia Toy Fair: Maxwell Associates, Suite 1710, No. 2 Penn Center, Philadelphia, Pennsylvania.

1968 Nov. 27 - Dec. 1 Philadelphia, Pennsylvania.

INTERNATIONAL FAIRS Cont'd

International Toy Fair: Harrogate, England.

British Toy Fair: J.A. Glanfield, Regent House, 89 Kingsway, London
W.C. 2, England,

1969 Jan. 26- 30 Brighton, England.

International Toy Fair: Spielwarenmesse GmbH., Berliner Platz 24,
85 Nurnburg, West Germany.

1969 Feb. 8 - 14 Nurnburg, West Germany.

International Toy Show: Salon International du Jouet, 93 rue de Turenne,
Paris 3e, France.

1969 Feb. 2 - 8 Paris, France.

Toy Fair: Salon International de Giocattolo, Via Morosini N. 20
Milano, Italy.

1969 Jan. 31 - Feb. 6 Milan, Italy.

Toy Exhibition: (Bel-Jodets), J. Isaac, Palais du Centenaire,
Brussels, Belgium.

1969 Mar. 23 - 30 Brussels, Belgium.

Hobby Show: A/S Herning-Itallen, Herning, Denmark.

1969 - Apr. 2 - 7 Herning, Denmark.

Feria Del Juguette: Valencia, Spain.

1969 Feb. 17 - 25 Valencia, Spain

Japan International Toy Fair: 3 - 14 Kotobuki-cho Daito-ku, Tokyo, Japan.

1968 Oct. 15 - 18 Tokyo, Japan.

REFERENCES

1. PRINCIPAL STATISTICS ON THE TOY AND GAME INDUSTRY - D.B.S. catalogues No. 47-205 "Miscellaneous Industries" (1938 - 1959) and No. 47-204 "Sporting Goods and Toy Industry" (1960-1965)
2. MANUFACTURING INDUSTRIES CHANNELS OF DISTRIBUTION - D.B.S. catalogue No. 95-544 "Manufacturing Industries, Channels of Distribution" (1961)
3. RESIDENT AND NON-RESIDENT OWNERSHIP OF CANADIAN INDUSTRIES - D.B.S. publication "Corporations and the Labor Unions Returns Act" (1963)
4. PRIVATE AND PUBLIC INVESTMENT IN CANADA - D.B.S. catalogues Nos. 61-504 "Private and Public Investment in Canada" and 13-201 "National Accounts"
5. WAGE RATES, SALARIES, HOURS OF LABOR AND EMPLOYMENT - D.B.S. catalogue 72-001 to 72-007 "Employment and Earnings"
6. IMPORTS - D.B.S. annual catalogue on imports No. 65-007 "Trade of Canada, Imports by Commodities", also No. 47-205 "Miscellaneous Industries"
7. EXPORTS - D.B.S. annual catalogue on imports 65-004 "Trade of Canada, Exports by Commodities", also No. 47-205 "Miscellaneous Industries"
8. TARIFFS - Department of National Revenue publication "The Customs Tariffs and Amendments" and Department of Finance publication "Canada Tariff Concessions Agreed in the Kennedy Round Negotiations under the General Agreement on Tariffs and Trade" June 1967.
9. ALL MANUFACTURING INDUSTRIES STATISTICS - D.B.S. catalogue Nos. 31-201 "General Review of the Manufacturing Industries of Canada" and 31-203 "Manufacturing Industries of Canada: Summary for Canada".
10. PERSONAL DISPOSABLE INCOME BY REGIONS - D.B.S. catalogue No. 13-201 "National Accounts"
11. POPULATION - 1965 - BY REGIONS - D.B.S. catalogue No. 13-201 "National Accounts"
12. COMPANIES MANUFACTURING PRODUCTS CLASSIFIED TO THIS INDUSTRY -
 - "Canadian Trade Index" -- The Canadian Manufacturers Association Publication
 - "Annual Toy Fair - Official Directory" -- The Canadian Toy Manufacturers Association
 - D.B.S. catalogue No. 47-204 "Sporting Goods and Toy Industry"

REFERENCES Cont'd

13. LIST OF TOY IMPORTERS - Canadian Toy Importers Association
14. LLOYD'S CANADIAN DIRECTORY: Toy, Notion and Stationery - Lloyd Publications of Canada, 16 Bimrook Road, Scarborough, Ontario.
15. PRINCIPAL STATISTICS ON THE TOY AND GAME INDUSTRY IN THE UNITED STATES - publications of the Bureau of Census, United States Department of Commerce:
 - A. Annual Survey of Manufacturers (1950-1965)
 - B. Industry Statistics:
 - Musical Instruments and Parts; Toys and Sporting and Athletic Goods MC63(2) - 39B.
 - Selected Materials Consumed MC63(1)-8
 - Expenditures for Plant and Equipment MC63(1)-5
 - General Summary: Manufacturing Industries MC63(1)-1
 - C. Imports: "U.S. Imports of Merchandise for Consumption" No. FT 125
 - D. Exports: "U.S. Exports of Domestic Merchandise" No. FT 410
16. FINANCIAL ANALYSIS OF THE TOY INDUSTRY IN THE UNITED STATES: CHARACTERISTICS OF THE TOY MARKET IN THE UNITED STATES -- Toy Manufacturers of America Inc., New York City, N.Y.
17. "TOYS AND GAMES" - A long-range planning service report by the Stanford Research Institute, Menlo Park, California.

