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Import Analysis

Analyse des importations

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ANALYSIS OF
IRRIGATION SYSTEM FITTINGS

MARCH TO AUGUST 1981

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Canada

C O N T E N T S

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- REFERENCES:
- (1) Customs Tariff: Item 40924-1
 - (2) Canadian International Trade Classification (Cat. #65-502E, Statistics Canada)
 - (3) Imports by Commodities (Cat. #65-007, Statistics Canada) Commodity Code 546-60

SECTION I

SCOPE OF ANALYSIS

This report is based on a detailed analysis of imports of irrigation system fittings during the period March to August 1981. These products are normally included in Statistics Canada Import Commodity Code 546-60(88) "Parts of agricultural irrigation systems".

SECTION II

CANADIAN PRODUCTION

Statistics Canada does not provide data on production or shipments of irrigation system fittings due to confidentiality restrictions.

SECTION III

ANALYSIS OF IMPORTS

Imports of irrigation system fittings during the period March to August 1981 amounted to \$2,341,491. Couplers accounted for 33 per cent of the total value. United States was the major country of export accounting for 98 per cent of the total value.

Ninety eight per cent of all imports included in this analysis are apparently, in Statistics Canada terminology "arms-length transactions", i.e. shipments between non-affiliated firms.

Full details of the analysis are provided in the following table.

IMPORTS OF IRRIGATION SYSTEM FITTINGS

MARCH TO AUGUST 1981

| Item | MATERIAL | | | | Quantity (No.) | Value (\$) | PROVINCE OF ENTRY | | | | | |
|-------------------------|--------------------------|-------------------------|-------|-----|-------------------|---------------|-------------------|-------------------------|-------|------|------|------|
| | Aluminum (% of Value) | Plastic (% of Value) | Steel | NFI | | | B.C. | Alberta (% of Value) | Sask. | Man. | Ont. | Que. |
| Adaptors: | | | | | | | | | | | | |
| Discharge | 13 | - | 86 | 1 | 295 | 8,553 | 21 | 78 | 1 | - | - | - |
| Flange | - | - | - | 100 | 148 | 2,127 | 58 | 27 | 15 | - | - | - |
| Suction | - | - | 96 | 4 | 311 | 12,613 | 58 | 42 | - | - | - | - |
| Telescoping | 38 | - | - | 62 | 68 | 1,314 | 63 | 22 | 15 | - | - | - |
| N.F.I. | 36 | 3 | 1 | 60 | 81,977 | 37,857 | 64 | 27 | 2 | 6 | 1 | - |
| | | | | | <u>82,799</u> | <u>62,464</u> | | | | | | |
| Bands: | | | | | | | | | | | | |
| Hold | 1 | - | - | 99 | 21,999 | 22,604 | 73 | 24 | 3 | - | - | - |
| Slide | - | - | - | 100 | 238 | 6,357 | 1 | 98 | 1 | - | - | - |
| N.F.I. | 48 | - | - | 52 | 4,662 | 12,855 | 45 | 50 | 2 | - | - | 3 |
| | | | | | <u>26,899</u> | <u>41,816</u> | | | | | | |
| Bands & Latches | 27 | - | - | 73 | 980 | 2,534 | 37 | 62 | 1 | - | - | - |
| Bands, Clamps & Latches | 7 | - | - | 93 | 4,374 | 12,519 | 33 | 7 | - | - | - | 60 |
| Bushings | 12 | 75 | - | 13 | 4,337 | 2,099 | 79 | 20 | 1 | - | - | - |
| Caps | - | - | - | 100 | 150,345 | 12,528 | 98 | 1 | - | - | 1 | - |
| Clamps: | | | | | | | | | | | | |
| Ring Lock | - | - | 93 | 7 | 5,322 | 27,625 | 70 | 28 | 2 | - | - | - |
| Torque | - | - | 99 | 1 | 1,157 | 6,822 | 93 | 3 | 4 | - | - | - |
| N.F.I. | - | - | 1 | 99 | 4,038 | 8,227 | 10 | 85 | 3 | 2 | * | - |
| | | | | | <u>10,517</u> | <u>42,674</u> | | | | | | |
| Cones: | | | | | | | | | | | | |
| Adapter | - | - | - | 100 | 63 | 1,424 | 37 | 63 | - | - | - | - |
| Reducing | 48 | - | - | 52 | 177 | 1,096 | 23 | 38 | - | - | - | 39 |
| Welding | 26 | - | - | 74 | 616 | 4,210 | 61 | 38 | - | 1 | - | - |
| N.F.I. | 2 | - | 35 | 63 | 395 | 2,217 | 3 | 79 | 6 | - | - | 12 |
| | | | | | <u>1,251</u> | <u>8,947</u> | | | | | | |

| Item | MATERIAL | | | | Quantity (No.) | Value (\$) | PROVINCE OF ENTRY | | | | | |
|----------------------|----------------------------|---------|-------|-----|-------------------|----------------|-------------------|---------|-------|------|------|------|
| | Aluminum (% of Value) | Plastic | Steel | NFI | | | B.C. | Alberta | Sask. | Man. | Ont. | Que. |
| Couplers: | | | | | | | | | | | | |
| Band & Latch | - | - | 100 | - | 3,081 | 40,432 | 78 | 22 | - | - | - | - |
| Compression | 4 | - | - | 96 | 21 | 1,517 | 8 | 92 | - | - | - | - |
| Dresser | 95 | - | - | 5 | 34 | 957 | 22 | 5 | 73 | - | - | - |
| Drain | 65 | - | - | 35 | 4,137 | 84,470 | 86 | 14 | - | - | - | - |
| Lateral | - | - | 33 | 67 | 775 | 6,694 | 100 | - | - | - | - | - |
| Lug Type | - | - | - | 100 | 697 | 15,684 | 100 | - | - | - | - | - |
| Press-in | 88 | - | - | 12 | 4,037 | 35,490 | 30 | - | - | - | - | 70 |
| Quick Latch | - | - | - | 100 | 3,931 | 36,340 | 74 | 13 | 6 | - | 7 | - |
| Ring Lock (Female) | - | - | 61 | 39 | 366 | 4,251 | 10 | 90 | - | - | - | - |
| Ring Lock (Male) | - | - | 53 | 47 | 417 | 3,037 | 23 | 77 | - | - | - | - |
| Ring Lock Mainline | - | - | 96 | 4 | 4,257 | 83,486 | 72 | 28 | - | - | - | - |
| Starter | - | - | 74 | 26 | 375 | 4,414 | 11 | 74 | 15 | - | - | - |
| Torque | 70 | - | - | 30 | 3,084 | 51,594 | 58 | 29 | 13 | - | - | - |
| Weld On(Quick Latch) | - | - | - | 100 | 975 | 9,201 | 100 | - | - | - | - | - |
| N.F.I. | 28 | 1 | 1 | 70 | 36,628 | 394,857 | 40 | 45 | 4 | 5 | 5 | 1 |
| | | | | | <u>62,815</u> | <u>772,424</u> | | | | | | |
| Ends | - | - | 100 | - | 283 | 4,301 | 73 | 27 | - | - | - | - |
| Elbows: | | | | | | | | | | | | |
| Band & Latch 45° | - | - | 100 | - | 145 | 4,501 | 14 | 86 | - | - | - | - |
| Band & Latch 90° | - | - | 100 | - | 182 | 5,649 | 79 | 21 | - | - | - | - |
| Field | 100 | - | - | - | 61 | 1,165 | 49 | 51 | - | - | - | - |
| Ring Lock 45° | - | - | 100 | - | 88 | 3,417 | 23 | 77 | - | - | - | - |
| Ring Lock 90° | - | - | 100 | - | 536 | 20,604 | 53 | 47 | - | - | - | - |
| Suction | 100 | - | - | - | 30 | 3,611 | 11 | 89 | - | - | - | - |
| Valve | 69 | - | 8 | 23 | 855 | 27,533 | 43 | 55 | - | 2 | - | - |
| Welding 90° | 100 | - | - | - | 251 | 6,030 | 59 | 31 | 10 | - | - | - |
| N.F.I. | 18 | 6 | - | 76 | 8,506 | 45,441 | 31 | 39 | 17 | 3 | 2 | 8 |
| | | | | | <u>10,654</u> | <u>117,951</u> | | | | | | |
| Flanges: | | | | | | | | | | | | |
| Weld On Companion | - | - | 100 | - | 251 | 2,194 | 88 | 12 | - | - | - | - |
| Companion | - | - | 100 | - | 599 | 4,630 | 92 | 8 | - | - | - | - |
| N.F.I. | - | 1 | 11 | 88 | 587 | 12,956 | 36 | 55 | 4 | - | - | 5 |
| | | | | | <u>1,437</u> | <u>19,780</u> | | | | | | |
| Gaskets | - | 2 | - | 98 | 15,809 | 25,738 | 45 | 36 | 12 | 4 | 3 | - |
| Latches | 11 | - | - | 89 | 1,449 | 2,299 | 28 | 5 | 4 | 11 | 52 | - |

| Item | MATERIAL | | | | Quantity (No.) | Value (\$) | PROVINCE OF ENTRY | | | | | Que. |
|----------------------|----------------------------|---------|-------|-----|-------------------|----------------|-------------------|---------------------------|-------|------|------|------|
| | Aluminum (% of Value) | Plastic | Steel | NFI | | | B.C. | Alberta (% of Value) | Sask. | Man. | Ont. | |
| Levellers; Sprinkler | - | - | - | 100 | 3,244 | 18,106 | 59 | 31 | 10 | - | - | - |
| Nipples | 8 | 32 | 3 | 57 | 10,074 | 8,283 | 34 | 23 | 2 | 33 | - | 8 |
| Openers; Valve | 77 | - | 23 | - | 411 | 14,616 | 63 | 23 | - | - | 1 | 13 |
| "O" Rings | - | - | - | 100 | 1,402 | 622 | 25 | 62 | 13 | - | - | - |
| Plugs, End: | | | | | | | | | | | | |
| Band & Latch | - | - | 100 | - | 156 | 1,889 | 61 | 39 | - | - | - | - |
| R-Lock | - | - | 100 | - | 241 | 3,507 | 48 | 50 | 2 | - | - | - |
| N.F.I. | 39 | - | - | 71 | 1,308 | 21,152 | 47 | 49 | 2 | 2 | - | - |
| | | | | | <u>1,705</u> | <u>26,548</u> | | | | | | |
| Plugs: | | | | | | | | | | | | |
| Pipe | - | - | - | 100 | 1,872 | 948 | 74 | 24 | 2 | - | - | - |
| Surge | 28 | - | 40 | 32 | 186 | 2,646 | 15 | 4 | 43 | 38 | - | - |
| N.F.I. | 19 | 29 | 2 | 50 | 17,803 | 6,051 | 58 | 13 | 6 | 9 | 1 | 13 |
| | | | | | <u>19,861</u> | <u>9,645</u> | | | | | | |
| Reducers: | | | | | | | | | | | | |
| Band & Latch | - | - | 100 | - | 173 | 4,166 | 71 | 29 | - | - | - | - |
| R-Lock | - | - | 100 | - | 119 | 3,104 | 35 | 52 | 13 | - | - | - |
| N.F.I. | 28 | 19 | 2 | 51 | 312 | 7,682 | 39 | 15 | 20 | 4 | 6 | 16 |
| | | | | | <u>604</u> | <u>14,952</u> | | | | | | |
| Ring Locks: | | | | | | | | | | | | |
| Weld on Highpressure | 98 | - | - | 2 | 693 | 13,329 | 100 | - | - | - | - | - |
| N.F.I. | - | 78 | - | 22 | 4,694 | 89,094 | 75 | 8 | 16 | - | 1 | - |
| | | | | | <u>5,387</u> | <u>102,423</u> | | | | | | |
| Rings; W/Latches | 37 | - | - | 63 | 1,193 | 3,378 | 100 | - | - | - | - | - |
| Rings; N.F.I. | 3 | - | - | 97 | 14,409 | 21,492 | 78 | - | - | 22 | - | - |
| Risers: | | | | | | | | | | | | |
| Pipe | 100 | - | - | - | 5,250 | 10,867 | 100 | - | - | - | - | - |
| Valve | 100 | - | - | - | 1,523 | 11,707 | 15 | 56 | - | - | - | 29 |
| N.F.I. | 34 | 2 | 7 | 57 | 11,245 | 36,752 | 26 | 67 | 2 | 4 | 1 | - |
| | | | | | <u>18,018</u> | <u>59,326</u> | | | | | | |
| Saddles | - | - | 100 | - | 131 | 4,830 | 31 | 19 | 50 | - | - | - |

| Item | MATERIAL | | | | Quantity (No.) | Value (\$) | PROVINCE OF ENTRY | | | | | Que. |
|---------------------------------------|----------------------------|---------------------------|-------------------------|-----|-------------------|------------------|-------------------|---------------------------|-------|------|------|------|
| | Aluminum (% of Value) | Plastic (% of Value) | Steel (% of Value) | NFI | | | B.C. | Alberta (% of Value) | Sask. | Man. | Ont. | |
| Sleeves: | | | | | | | | | | | | |
| Repair | - | - | 100 | - | 252 | 1,603 | 15 | 85 | - | - | - | - |
| N.F.I. | - | - | - | 100 | 119 | 1,061 | 79 | 21 | - | - | - | - |
| | | | | | <u>371</u> | <u>2,664</u> | | | | | | |
| Strainers | 36 | - | 8 | 56 | 30 | 1,375 | 45 | - | 8 | 37 | 10 | - |
| Stubs; Valve | 57 | - | 1 | 42 | 3,408 | 46,706 | 74 | 14 | 12 | - | - | - |
| Tees: | | | | | | | | | | | | |
| Center Inlet | - | - | - | 100 | 12 | 756 | 29 | 71 | - | - | - | - |
| Band & Latch End Tee | - | - | 100 | - | 49 | 2,070 | 28 | 72 | - | - | - | - |
| Band & Latch Field Tee (Line Tee) | - | - | 100 | - | 51 | 2,269 | 36 | 64 | - | - | - | - |
| Band & Latch Universal Valve Tee Set | - | - | 100 | - | 1,822 | 67,372 | 46 | 54 | - | - | - | - |
| Ring Lock End Tee | - | - | 100 | - | 29 | 1,365 | 38 | 62 | - | - | - | - |
| Ring Lock Field Tee | - | - | 100 | - | 37 | 1,762 | 40 | 60 | - | - | - | - |
| Valve | - | - | - | 100 | 170 | 6,531 | 15 | 85 | - | - | - | - |
| Universal Valve Tee W/Stabilizer Foot | - | - | 100 | - | 2,521 | 105,485 | 55 | 45 | - | - | - | - |
| N.F.I. | 10 | - | 10 | 80 | 8,364 | 55,363 | 14 | 43 | 35 | 2 | 3 | 3 |
| | | | | | <u>13,055</u> | <u>242,973</u> | | | | | | |
| Valves: | | | | | | | | | | | | |
| Butterfly | - | - | - | 100 | 34 | 8,172 | 10 | 20 | - | 70 | - | - |
| Check | - | - | - | 100 | 155 | 12,319 | 6 | 86 | 5 | 3 | - | - |
| Drain | 3 | - | - | 97 | 4,263 | 15,226 | 100 | - | - | - | - | - |
| Foot | 12 | - | - | 88 | 57 | 5,139 | 90 | - | - | 10 | - | - |
| Tee | 28 | - | - | 72 | 840 | 40,309 | 14 | 63 | - | 9 | 3 | 11 |
| N.F.I. | 8 | 20 | 2 | 70 | 11,014 | 152,935 | 57 | 21 | 7 | 9 | 1 | 5 |
| | | | | | <u>16,363</u> | <u>234,100</u> | | | | | | |
| Irrigation System Fittings, N.F.I. | - | - | - | - | - | 401,314 | | | | | | |
| TOTAL | | | | | | <u>2,341,441</u> | | | | | | |

NOTES: N.F.I. - Not further identified.

Dollar values shown are based on selling price F.O.B. plant, in Canadian dollars.

IMPORT MARKET CONCENTRATION

IRRIGATION SYSTEM FITTINGS

MARCH TO AUGUST 1981

| <u>Value</u> <u>(\$)</u> | <u>MARKET SHARES</u> | | |
|-----------------------------|---|--|--|
| | <u>Top 3</u> <u>Importers</u> (-) | <u>Top 5</u> <u>Importers</u> % of Value | <u>Top 10</u> <u>Importers</u> (-) |
| 2,341,441 | 29 | 41 | 62 |

SECTION IV

MAJOR EXPORTERS TO CANADA OF IRRIGATION SYSTEM FITTINGS

(In descending order of dollar values)

MARCH TO AUGUST 1981

| <u>UNITED STATES</u> | | <u>Value</u> <u>(\$)</u> |
|---------------------------------|--------------|-----------------------------|
| Travis Pattern and Foundry Inc. | Spokane, WA | 1,135,400 |
| Alumax Irrigation Products | Spokane, WA | 246,876 |
| Wade Manufacturing Co. | Tualatin, OR | 231,003 |
| Bush Hog Irrigation | Chino, CA | 111,266 |

The above four exporters of irrigation system fittings for the period March to August 1981 accounted for 74 per cent of the value analyzed in Section III. The remaining 80 exporters accounted for 26 per cent of the value analyzed.

SECTION V

CANADIAN AND FOREIGN TARIFFS

CANADA

Irrigation system fittings included in this analysis were dutiable under the following most commonly applied tariff item.

| <u>Tariff Item</u> | <u>Description</u> | <u>British Preferential Tariff</u> | <u>Most Favoured Nation Tariff</u> | <u>General Tariff</u> | <u>General Preferential Tariff</u> | <u>U.K. & Ireland</u> |
|--------------------|----------------------------------|------------------------------------|------------------------------------|-----------------------|------------------------------------|---------------------------|
| 40924-1 | Sprinkler irrigation systems.... | Free | Free | Free | Free | Free |
| | Parts of all the foregoing..... | Free | Free | Free | Free | Free |

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

Customs Programs Branch, Secretariat
Department of National Revenue
Customs and Excise
Ottawa, Ontario
K1A 0L5

FOREIGN COUNTRIES

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

International Bureaux
Department of Industry, Trade and Commerce
Ottawa, Ontario
K1A 0H5