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ANALYSIS OF
FRESH GRAPES

JANUARY TO DECEMBER 1981

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Canada

C O N T E N T S

	<u>Page</u>
<u>SECTION I</u> - Scope of Analysis	3
<u>SECTION II</u> - Reconciliation	4
<u>SECTION III</u> - Analysis of Imports:	5
Summary - Table 1	6
Table 1 - Type and Variety	7
Summary - Table 2	8
Table 2 - Province of Entry	9
Summary - Table 3	12
Table 3 - Exporting State	13
Table 4 - Import Market Concentration	15
<u>SECTION IV</u> - Sampling and Estimates	16
<u>SECTION V</u> - Foreign Exporters to Canada	17
<u>SECTION VI</u> - Import Trends	19
<u>SECTION VII</u> - Canadian and Foreign Tariffs	20

- REFERENCES:
- (1) Customs Tariff: Item 9209-1
 - (2) Canadian International Trade Classification (Cat. #65-502E, Statistics Canada)
 - (3) Imports by Commodities (Cat. #65-007, Statistics Canada) Commodity Code 71-18

SECTION I

SCOPE OF ANALYSIS

This report is based on a detailed examination of documents covering imports of fresh grapes from the United States during the period January to December 1981. This product is included in Statistics Canada Import Code: 71-18 "Grapes, fresh or chilled".

The documents examined were selected by a sampling technique as follows. The shipments were divided into three groups (strata) on the following basis.

Stratum 1 consists of ledger lines meeting all the criteria A to D below:

- (A) the months of September and October only;
- (B) imports entering the Province of Ontario;
- (C) values of 30 ¢ per pound or less;
- (D) ledger values of \$20,000 or more.

Stratum 2 consists of:

- same as A, B, C of Stratum 1, with ledger values of \$19,999 and under.

Stratum 3 consists of:

- any ledger value not related to the criteria of stratum 1 or 2, for all 12 months.

Shipments from Stratum 1 were examined using a ratio of 1 in 3. One in eight of Stratum 2; and one in ninety of Stratum 3 were selected for examination, using systematic sampling from random starts. Results in this report are based on the examined invoices: those of Stratum 1 were multiplied by three while those of Stratum 2 and 3 were multiplied by eight and ninety respectively. In all 395 documents were examined.

SECTION II

RECONCILIATION

The value reported in this analysis does not correspond to official Statistics Canada figures for various reasons.

Reconciliation of the two total figures is explained as follows:

<u>Values accounted for</u>	<u>Value</u> <u>(\$)</u>
Documents not available for analysis	486,288
Values for palletizing and chilling	6,601,168
Total values analyzed in this report	89,743,690
	<hr/>
Total values accounted for as above	96,831,146
Total values published by Statistics Canada for 1981 from United States	95,791,000

Difference of total values = \$1,040,146 (1.07 per cent)

NOTE: Statistics Canada's figures are subject to revision; changes will be reflected in the normal way: i.e., "pink sheets", which are located in the front section of Catalogue #65-007

SECTION III

ANALYSIS OF IMPORTS

Imports of fresh grapes from the United States during the year 1981 amounted to a total quantity of 247,825,616 pounds for a value of \$89,743,690 (see Section IV for accuracy of results due to sampling technique utilized in this report).

The analysis indicates that grapes used for wine making accounted for 149,388,500 pounds, or 60 per cent of the total quantity.

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

This section includes four tables of information. Table 1 shows imports by type and variety. Table 2 by province of entry, Table 3 by exporting state and Table 4 shows import market concentration.

NOTES: Values for all tables of information are rounded.

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

SUMMARY TABLE 1

IMPORTS OF FRESH GRAPES - BY TYPE AND VARIETY

JANUARY TO DECEMBER 1981

<u>TYPE</u>	<u>QUANTITY</u> (000 lb.)	<u>VALUE</u> (\$,000)
Table	94,874	51,303
Wine	149,389	37,041
Not Known	<u>3,563</u>	<u>1,399</u>
TOTAL	247,826	89,743

TABLE 1
IMPORTS OF FRESH GRAPES - BY TYPE AND VARIETY
JANUARY TO DECEMBER 1981

<u>Type</u>	<u>Variety</u>	<u>Lug Size</u> (lb.)	<u>Quantity</u> (lb.)	<u>Value</u> (\$)
Table	Almeria	15 to 31	2,864,160	1,856,363
	Cardinal	22 to 31	2,608,650	2,205,575
	Emperor	15 to 30	28,650,240	12,768,632
	Exotic	22, 23, & 30	501,300	439,529
	Flame	23 & 25	1,501,470	910,680
	Italia Muscat	23	2,719,800	1,634,577
	Perlette	22, 23 & 31	2,435,040	2,161,838
	Queen	23	8,101,980	3,422,388
	Ribier	23	3,369,960	2,151,866
	Superior	22	594,000	585,629
	Thompson	22 to 36	17,953,128	9,321,104
	Tokay	23 & 25	6,106,536	2,553,949
	Not Known	14 to 31	17,467,560	11,291,118
TOTAL - TABLE			94,873,824	51,303,248
Wine	Alicante	36	37,189,560	8,409,095
	Barbera	36	624,996	144,843
	Cabernet	36	5,268,240	1,182,847
	Carignane	36	9,621,900	2,164,975
	Cub Souvigion	36	84,240	22,810
	Grenache	36	9,565,200	2,136,413
	Malaga	36	97,200	26,244
	Malvasia	36	77,760	18,693
	Merlot	36	25,272	5,829
	Mission	36	1,465,632	342,904
	Muscat	36	38,600,892	9,933,309
	Palomino	36	357,696	96,265
	Petit Sirah	36	600,624	135,414
	Rubi Red	36	20,520	4,908
	Zinfandel	36	27,936,240	7,901,303
	Mixed Black	36	4,793,904	1,117,693
Not Known	36, 40 & 50	13,058,624	3,397,550	
TOTAL - WINE			149,388,500	37,041,095
Not Known	Not Known	25 to 50	3,563,292	1,399,345
GRAND TOTAL			247,825,616	89,743,688

SUMMARY TABLE 2

IMPORTS OF FRESH GRAPES - BY PROVINCE OF ENTRY

JANUARY TO DECEMBER 1981

<u>PROVINCE OF ENTRY</u>	<u>QUANTITY</u> (1b.)	<u>VALUE</u> (\$)
British Columbia	38,105,370	15,109,787
Alberta	13,253,220	6,131,409
Saskatchewan	2,355,300	1,163,614
Manitoba	6,648,840	2,315,163
Ontario	139,365,806	48,505,200
Quebec	41,549,310	13,163,623
New Brunswick	5,474,970	2,639,362
Nova Scotia	331,200	198,719
Newfoundland	<u>741,600</u>	<u>516,811</u>
TOTAL	247,825,616	89,743,688

TABLE 2
IMPORTS OF FRESH GRAPES - BY PROVINCE OF ENTRY
JANUARY TO DECEMBER 1981

<u>Province of Entry</u>	<u>Type</u>	<u>Variety</u>	<u>Quantity</u> (lb.)	<u>Value</u> (\$)	
British Columbia	Table	Almeria	679,410	391,508	
		Cardinal	139,950	84,281	
		Emperor	2,256,390	928,992	
		Exotic	101,700	72,250	
		Flame	95,850	57,041	
		Italia Muscat	124,200	62,855	
		Perlette	55,800	37,957	
		Ribier	455,400	252,965	
		Superior	594,000	585,629	
		Thompson	1,841,400	1,024,916	
		Tokay	496,800	208,223	
	Not Known	<u>7,679,880</u>	<u>4,771,557</u>		
			14,520,780	8,478,174	
		Wine	Alicante	479,520	147,528
			Grenache	174,960	40,451
	Muscat		7,270,560	2,008,571	
	Palomino		155,520	43,124	
	Zinfandel		11,566,800	3,453,288	
	Mixed Black		3,499,200	804,814	
	Not Known		<u>324,000</u>	<u>84,590</u>	
		23,470,560	6,582,366		
	Not Known	Not Known	114,030	49,247	
TOTAL - BRITISH COLUMBIA			<u>38,105,370</u>	<u>15,109,787</u>	
Alberta	Table	Almeria	1,076,400	735,987	
		Cardinal	475,200	486,723	
		Emperor	1,179,900	577,275	
		Flame	186,300	175,688	
		Perlette	745,200	585,629	
		Ribier	517,500	317,460	
		Thompson	1,278,900	601,545	
		Tokay	3,229,200	1,347,839	
		Not Known	<u>832,140</u>	<u>276,832</u>	
			9,520,740	5,104,978	
	Wine	Not Known	3,732,480	1,026,431	
TOTAL - ALBERTA			<u>13,253,220</u>	<u>6,131,409</u>	

<u>Province of Entry</u>	<u>Type</u>	<u>Variety</u>	<u>Quantity</u> (lb.)	<u>Value</u> (\$)
Saskatchewan	Table	Cardinal	22,500	14,332
		Emperor	334,800	147,672
		Tokay	1,490,400	627,263
		Not Known	507,600	374,347
		TOTAL - SASKATCHEWAN		2,355,300
Manitoba	Table	Emperor	1,575,000	514,286
		Exotic	89,100	87,479
		Flame	648,000	294,065
		Thompson	623,700	476,279
			2,935,800	1,372,109
	Wine	Alicante	2,099,520	507,383
		Muscat	1,613,520	435,671
			3,713,040	943,053
	TOTAL - MANITOBA		6,648,840	2,315,163
	Ontario	Table	Almeria	353,700
Cardinal			1,792,800	1,444,552
Emperor			15,931,980	7,002,791
Exotic			124,200	104,111
Flame			571,320	383,886
Italia Muscat			2,223,000	1,374,893
Perlette			1,242,000	1,171,259
Queen			8,101,980	3,422,388
Ribier			1,838,160	1,260,682
Thompson			9,737,928	5,083,127
Tokay			890,136	370,624
Not Known			6,455,970	4,570,912
			49,263,174	26,430,063
Wine		Alicante	21,391,320	4,686,029
		Barbera	624,996	144,843
		Cabernet	5,268,240	1,182,847
		Carignane	7,289,100	1,631,953
		Cub Souvigion	84,240	22,810
		Grenache	5,502,240	1,214,395
		Malaga	97,200	26,244
	Malvasia	77,760	18,693	
Merlot	25,272	5,829		
Mission	1,465,632	342,904		
Muscat	21,566,412	5,402,434		
Palomino	202,176	53,142		

<u>Province of Entry</u>	<u>Type</u>	<u>Variety</u>	<u>Quantity</u> (lb.)	<u>Value</u> (\$)
Ontario	Wine	Petit Sirah	600,624	135,414
		Rubi Red	20,520	4,908
		Zinfandel	12,870,240	3,503,232
		Mixed Black	1,294,704	312,879
		Not Known	8,418,944	2,131,880
			86,799,620	20,820,436
	Not Known	Not Known	3,303,012	1,254,701
TOTAL - ONTARIO			139,365,806	48,505,200
Quebec	Table	Almeria	558,900	320,759
		Cardinal	178,200	175,688
		Emperor	3,096,720	1,755,031
		Exotic	186,300	175,688
		Italia Muscat	372,600	196,829
		Perlette	392,040	366,993
		Ribier	558,900	320,759
		Thompson	4,471,200	2,135,237
	Not Known	61,650	47,831	
			9,876,510	5,494,815
	Wine	Alicante	13,219,200	3,068,156
		Carignane	2,332,800	533,021
		Grenache	3,888,000	881,566
Muscat		8,150,400	2,086,633	
Zinfandel		3,499,200	944,783	
Not Known		583,200	154,649	
		31,672,800	7,668,808	
TOTAL - QUEBEC			41,549,310	13,163,623
New Brunswick	Table	Almeria	195,750	167,272
		Emperor	4,275,450	1,842,585
		Not Known	1,003,770	629,505
TOTAL - NEW BRUNSWICK			5,474,970	2,639,362
NOVA SCOTIA	Table	Not Known	331,200	198,719
New Foundland	Table	Not Known	595,350	421,415
	Not Known	Not Known	146,250	95,396
TOTAL - NEW FOUNDLAND			741,600	516,811
GRAND TOTAL - ALL PROVINCES			247,825,616	89,743,688

SUMMARY TABLE 3

IMPORTS OF FRESH GRAPES - BY EXPORTING STATE

JANUARY TO DECEMBER 1981

<u>EXPORTING STATE</u>	<u>QUANTITY</u> <u>(000 LB)</u>	<u>VALUE</u> <u>(\$,000)</u>
California	242,232	86,907
Illinois	272	61
Massachusetts	2,597	1,510
Michigan	1,702	682
Minnesota	121	79
New York	894	498
Washington	8	6
TOTAL	<u>247,826</u>	<u>89,743</u>

TABLE 3
IMPORTS OF FRESH GRAPES - BY EXPORTING STATE
JANUARY TO DECEMBER 1981

<u>Exporting State</u>	<u>Type</u>	<u>Variety</u>	<u>Quantity</u> (Tb.)	<u>Value</u> (\$)	
California	Table	Almeria	2,814,840	1,799,979	
		Cardinal	2,586,150	2,191,244	
		Emperor	27,513,180	12,199,317	
		Exotic	501,300	439,529	
		Flame	1,501,470	910,680	
		Italia Muscat	2,719,800	1,634,577	
		Perlette	2,435,040	2,161,838	
		Queen	8,101,980	3,422,388	
		Ribier	3,369,960	2,151,866	
		Superior	594,000	585,629	
		Thompson	17,953,128	9,321,104	
		Tokay	6,106,536	2,553,949	
		Not Known	14,846,940	9,639,894	
				91,044,324	49,011,994
		Wine	Alicante	36,807,456	8,326,492
			Barbera	624,996	144,843
			Cabernet	5,268,240	1,182,847
			Carignane	9,621,900	2,164,975
			Cub Sauvignon	84,240	22,810
			Grenache	9,565,200	2,136,413
			Malaga	97,200	26,244
			Malvasia	77,760	18,693
			Merlot	25,272	5,829
			Mission	1,465,632	342,904
			Muscat	38,438,676	9,894,035
			Palomino	357,696	96,265
			Petit Sirah	600,624	135,414
	Rubi Red	20,520	4,908		
	Zinfandel	27,936,240	7,901,303		
	Mixed Black	4,793,904	1,117,693		
	Not Known	12,497,024	3,263,890		
		148,282,580	36,785,558		
	Not Known	Not Known	2,905,182	1,109,015	
TOTAL - CALIFORNIA			242,232,086	86,906,567	

<u>Exporting State</u>	<u>Type</u>	<u>Variety</u>	<u>Quantity</u> (Tb.)	<u>Value</u> (\$)
Illinois	Wine	Alicante	246,024	54,843
		Muscat	<u>26,136</u>	<u>6,615</u>
TOTAL - ILLINOIS			272,160	61,458
Massachusetts	Table	Almeria	33,750	43,019
		Emperor	1,046,250	511,700
		Not Known	<u>1,370,250</u>	<u>860,271</u>
			2,450,250	1,414,990
	Not Known	Not Known	146,250	95,396
TOTAL - MASSACHUSETTS			2,596,500	1,510,386
Michigan	Table	Not Known	628,650	353,754
	Wine	Not Known	561,600	133,660
	Not Known	Not Known	511,860	194,934
TOTAL - MICHIGAN			1,702,110	682,348
Minnesota	Table	Almeria	13,500	11,447
		Cardinal	22,500	14,332
		Emperor	<u>84,600</u>	<u>53,349</u>
TOTAL - MINNESOTA			120,600	79,128
New York	Table	Not Known	621,720	437,199
	Wine	Alicante	136,080	27,760
		Muscat	<u>136,080</u>	<u>32,659</u>
		272,160	60,419	
TOTAL - NEW YORK			893,880	497,618
Washington	Table	Almeria	2,070	1,919
		Emperor	<u>6,210</u>	<u>4,265</u>
TOTAL - WASHINGTON			8,280	6,184
GRAND TOTAL			<u>247,825,616</u>	<u>89,743,689</u>

TABLE 4

IMPORT MARKET CONCENTRATION

FRESH GRAPES

JANUARY TO DECEMBER 1981

<u>Type</u>	<u>Value</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> (-)
Table	51,303,250	23	33	53
Wine	37,041,095	36	46	63
Not Known	<u>1,399,354</u>	81	94	100*
TOTAL	89,743,690			

NOTES: *Less than 10 importers.
All percentage figures are rounded.

SECTION IV

SAMPLING AND ESTIMATES

Accuracy of Results

Since shipments were selected using random sampling, figures in the tables do not correspond exactly to the results which would have been obtained if all shipments had been examined. The probable range of error depends on such factors as the number of shipments examined, their similarity or otherwise, etc.

The following summary shows the probable range of error for various values shown in the Tables in Section III.

<u>Value in Table</u>	<u>Typical Relative Standard Deviation (%)</u>
\$89.7 million	7.1%
\$48.5 million	11.5%
\$15 million to 26 million	20%
\$ 6 million to 13 million	25% to 35%
\$ 1 million to 5 million	40% to 60%
Under \$1 million	Over 70%

In most cases (approximately two thirds or more), the true result will be within plus or minus one relative standard deviation of the values shown in the tables. In rare cases (less than one in twenty) will the true value be more than two relative standard deviations from the table value.

For example, in Table 1 imports of Thompson grapes are shown as having a value of \$9,321,104. From the above summary, the relative standard deviation is probably around 30% or about \$2,800,000. So it is probable (two chances out of three) that the actual imports were in the range of \$6,500,000 to \$12,100,000 and very likely (95% sure) that they were within two standard deviations - that is, between \$3,700,000 and \$14,900,000.

SECTION V

FOREIGN EXPORTERS TO CANADA

Major exporters of fresh grapes to Canada from U.S.A. are listed below in descending order of value. These firms accounted for 93 per cent of the total value analyzed during the period January to December 1981.

<u>UNITED STATES</u>	Value (\$,000)
Safeway Stores Inc.	Oakland, CA 7,010
Lamanuzzi & Pantaleo	Clovis, CA 5,151
Sunniland Fruit Inc.	Stockton, CA 5,049
Tenneco West Inc.	Bakersfield, CA 4,634
M & R Co.	Lodi, CA 4,115
Ballantine Produce Co.	Sanger, CA 3,388
Blue Anchor Inc.	Sacramento, CA 3,243
Joe Phillips Inc.	Fresno, CA 2,748
M. Caratan Inc.	Delano, CA 2,709
T. Apkarian & Sons	Reedley, CA 2,672
El Rancho Farms	Arvin, CA 2,577
David Freedman & Co. Inc.	Delano, CA 2,549
Dan Tudor & Son	Delano, CA 2,422
V.B.Z. Inc.	Delano, CA 2,419
Delta Packing Co. of Lodi (Inc.)	Lodi, CA 2,046
Royal Madera Vineyards	Madera, CA 2,003
Stevco Inc.	Beverly Hills, CA 1,750
Calif. Prod. Dist. Inc.	Los Angeles, CA 1,608
D'Arrigo Brothers Co.	Reedley, CA 1,450
Giumarra Int. Sales	Salinas, CA) Bakersfield, CA) 1,433
J.B. Distributing Co.	Los Angeles, CA 1,375
George Bros. Inc.	Sultana, CA 1,296
Florance Distributing Co. Inc.	Los Angeles, CA 1,232
S.L. Douglas	Exeter, CA 1,149
Barr Packing Co.	Sanger, CA 1,131
Simonian Fruit Co.	Fowler, CA 1,122
Elkhorn Fruit Co.	Lodi, CA 1,100
Chinchiolo & Co.	Stockton, CA 990
R & J Packing & Sales Co.	Lodi, CA 965
Nash De Camp Co.	Visalia, CA 948
Casoli Bkrg. Co. Inc.	Chelsea, MA 947
Sun World Inc.	Bakersfield, CA 902
Elmco Vineyard Inc.	Porterville, CA 853
Harding & Leggit	CA 778
Anthony Abbatte	Fresno, CA 761

<u>UNITED STATES</u>		<u>Value</u> <u>(\$,000)</u>
Pacific Fruit & Produce Co.	Stockton, CA	675
Root Pkg. & Dist. Co.	Los Angeles, CA	652
Louis Caric & Sons	Delano, CA	615
Youngstown Grape Dist.	Reedley, CA	548
Richard A. Glass Co.	Indio, CA	533
Watson Distributors	Fresno, CA	449
Jack G. Zaninovich Farms	Porterville, CA	412
Frank A. Lucich Co. Inc.	Delano, CA	394
Mendelson-Zeller Co. Inc.	San Francisco, CA	393
Chris Sorenson Packing Co.	Parlier, CA	369
Anton Caratan & Son	Delano, CA	347
Sunview Inc. International	Delano, CA	341
J B J Distributing Inc.	La Habra, CA	328
Borton & Maul Inc.	Bakersfield, CA	321
Louie Elias	Detroit, MI	318
		<hr/>
		83,220

SECTION VI

IMPORT TRENDS

Import Commodity Code 71-18 "Grapes, fresh"

Calendar Years 1976-1981

<u>Country of Export</u>	<u>1976</u>		<u>1977</u>		<u>1978</u>		<u>1979</u>		<u>1980</u>		<u>1981</u>		<u>% GROWTH P.A. 1976-1981</u>	
	<u>0001b.</u>	<u>\$,000</u>	<u>0001b.</u>	<u>\$,000</u>	<u>0001b.</u>	<u>\$,000</u>	<u>0001b.</u>	<u>\$,000</u>	<u>0001b.</u>	<u>\$,000</u>	<u>0001b.</u>	<u>\$,000</u>	<u>Qty.</u>	<u>Value</u>
U.S.A.	277,341	53,096	260,880	62,248	232,653	68,043	292,382	86,425	274,902	89,679	245,892	95,791	- 2	+ 13
Other	21,534	7,845	20,489	10,440	29,993	13,353	26,218	16,112	25,380	18,516	29,493	23,426	+ 6	+ 24
TOTAL	298,876	60,941	281,369	72,688	262,646	81,396	318,601	102,537	300,282	108,195	275,385	119,217	- 2	+ 14

NOTE: Figures may not add due to rounding.

SOURCE: Statistics Canada

SECTION VII

CANADIAN AND FOREIGN TARIFFS

CANADA

Fresh grapes 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>
9209-1	Grapes, Vitis Vinifera Species. Per Pound.....	Free	Free	2 ¢	-	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 Bureau
Department of Industry, Trade and Commerce
Ottawa, Ontario
K1A 0H5