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Import Analysis

Analyse des importations

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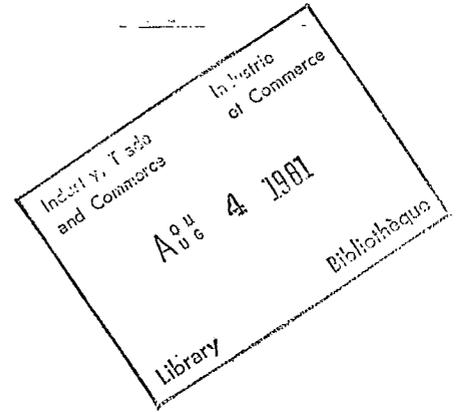
EYEGLOSS FRAMES AND PARTS

JANUARY TO MARCH AND
SEPTEMBER TO NOVEMBER 1979

MATERIAL APPEARING IN SECTION II OF THIS REPORT MUST
NOT BE REPRINTED WITHOUT PRIOR PERMISSION FROM THE
IMPORT ANALYSIS

Further information available from Import
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Pour plus amples renseignements s'adresser à
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systèmes intégrés, Industrie et Commerce,
Ottawa Canada, K1A 0H5



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REFERENCES: (1) Customs Tariff: Item 32800-1

(2) Trade of Canada Imports:
Import Classes 883-12 & 883-19

SECTION I

SCOPE OF ANALYSIS

This report is based on a detailed analysis of imports of eyeglass frames and parts during the period January to March and September to November 1979. These products are included in the following Statistics Canada Import Classes.

- 883-12 Spectacle and eyeglass frames
- 883-19 Parts for spectacle and eyeglass frames

During the years 1974 to 1979 imports of eyeglass frames showed an average annual increase of three percent in real terms and 20 percent in terms of dollar value.(see table in Section IV).

SECTION II

ANALYSIS OF IMPORTS

Imports of eyeglass frames and parts during January to March and September to November 1979 were valued at \$16,453,383. The analysis indicates that eyeglass frames accounted for \$15,622,932 or 95 percent of the total value of imports. Eyeglass frame parts (fronts and temples) accounted for \$830,451 or five percent of the total value of imports.

Full details are provided in the following table.

IMPORTS OF EYEGLOSS FRAMES AND PARTS

JANUARY TO MARCH & SEPTEMBER TO NOVEMBER 1979

<u>Item</u>	<u>Country of Origin</u>	<u>Unit Price</u> (<u>\$</u>)	<u>Material</u>	<u>Quantity</u> (<u>No.</u>)	<u>Value</u> (<u>\$</u>)	<u>Import Market Concentration (Market Shares)</u>		
						<u>Importers</u>		
						<u>Top 3 Firms</u> (<u>% of Value</u>)	<u>Top 5 Firms</u> (<u>% of Value</u>)	
Eyeglass Frames: ⁽¹⁾	France:	Up to 3.00:	Plastic	772	1,920			
			Not Specified	1,812	2,985			
					<u>2,584</u>	<u>4,905</u>		
		3.01 to 5.00:	Plastic	7,897	34,036			
			Metal	1,875	8,182			
			Combination)	5,177*	23,271*			
			Not Specified)					
				<u>14,949</u>	<u>65,489</u>			
		5.01 to 8.00:	Plastic	83,744	574,175			
			Metal	17,495	122,548			
			Combination	811	6,309			
			Not Specified	34,326	219,740			
				<u>136,376</u>	<u>922,772</u>			
8.01 to 12.00:	Plastic	92,860	862,592					
	Metal	27,036	268,424					
	Combination	500	5,311					
	Not Specified	46,263	451,852					
		<u>166,659</u>	<u>1,588,179</u>					
Over 12.00:	Plastic	18,774	281,096					
	Metal	21,980	318,054					
	Combination	9,635	147,785					
	Not Specified	37,350	624,036					
		<u>87,739</u>	<u>1,370,371</u>					
-	-	Plastic	-	153,989				
		Metal	-	5,138				
		Combination	-	292				
		-	-	184,958				
			<u>344,377</u>					
TOTAL - FRANCE					4,296,093	38	57	

Item	Country of Origin	Unit Price (\$)	Material	Quantity (No.)	Value (\$)	Import Market Concentration (Market Shares) Importers	
						Top 3 Firms (% of Value)	Top 5 Firms
Eyeglass Frames ⁽¹⁾ (Cont'd)	Italy:	Up to 3.00:	Plastic	20,238	39,542		
			Metal	16,989	14,383		
			Not Specified	876	1,827		
				<u>38,103</u>	<u>55,752</u>		
		3.01 to 5.00:	Plastic	2,218	9,606		
			Metal	2,173	9,941		
			Not Specified	4,518	20,015		
				<u>8,909</u>	<u>39,562</u>		
		5.01 to 8.00:	Plastic	55,455	376,986		
			Metal	26,686	185,802		
			Combination	352	2,044		
			Not Specified	97,246	687,207		
				<u>179,739</u>	<u>1,252,039</u>		
		8.01 to 12.00:	Plastic	60,238	553,019		
			Metal	74,397	683,177		
Not Specified	64,495		589,922				
		<u>199,130</u>	<u>1,826,118</u>				
Over 12.00:	Plastic	3,562	47,609				
	Metal	4,892	78,961				
	Not Specified	11,579	240,883				
		<u>20,033</u>	<u>367,453</u>				
-	Plastic	-	13,955				
	Metal	-	21,216				
	Not Specified	-	30,667				
			<u>65,838</u>				
TOTAL - ITALY					<u>3,606,762</u>	<u>59</u>	<u>73</u>

Item	Country of Origin	Unit Price (\$)	Material	Quantity (No.)	Value (\$)	Import Market Concentration (Market Shares)	
						Importers	
						Top 3 Firms (% of Value)	Top 5 Firms (% of Value)
Eyeglass Frames ⁽¹⁾ (Cont'd)	West Germany:	3.01 to 5.00:	Plastic	7,515	34,852		
			Combination)	2,352*	11,274*		
			Not Specified)	<u>9,867</u>	<u>46,126</u>		
		5.01 to 8.00:	Plastic	7,136	49,709		
			Metal)	2,034*	13,713*		
			Combination)				
		Not Specified)	<u>9,170</u>	<u>63,422</u>			
		8.01 to 12.00:	Plastic	37,208	376,795		
			Metal	3,257	35,420		
			Not Specified	<u>28,415</u>	<u>302,925</u>		
			<u>68,880</u>	<u>715,140</u>			
Over 12.00:	Plastic	56,498	970,973				
	Metal	17,124	330,906				
	Combination	119	3,112				
	Not Specified	<u>63,748</u>	<u>1,188,281</u>				
			<u>137,489</u>	<u>2,493,272</u>			
-	-	Not Specified	-	43,105			
	TOTAL - WEST GERMANY				<u>3,361,065</u>	<u>56</u>	<u>68</u>
United States:	Up to 3.00:	Plastic	8,503	14,571			
		Not Specified	<u>19,660</u>	<u>36,410</u>			
			<u>28,163</u>	<u>50,981</u>			
3.01 to 5.00:	Plastic	5,373	23,635				
	Not Specified	<u>25,409</u>	<u>105,060</u>				
			<u>30,782</u>	<u>128,695</u>			

Import Market
Concentration
(Market Shares)
Importers
Top 3 Top 5
Firms Firms
(% of Value)

Item	Country of Origin	Unit Price (\$)	Material	Quantity (No.)	Value (\$)	Top 3 Firms (% of Value)	Top 5 Firms (% of Value)
Eyeglass Frames ⁽¹⁾ (Cont'd)	United States(Cont'd)	5.01 to 8.00:	Plastic	7,916	53,193	63	70
			Not Specified	45,261	282,802		
				<u>53,177</u>	<u>335,995</u>		
		8.01 to 12.00:	Plastic	9,478	95,057		
			Not Specified	20,146	191,219		
				<u>29,624</u>	<u>286,276</u>		
		Over 12.00:	Plastic	8,666	123,243		
			Not Specified	13,937	208,272		
				<u>22,603</u>	<u>331,515</u>		
		-	Not Specified	-	2,583		
TOTAL - UNITED STATES					<u>1,136,045</u>		
Austria:		5.01 to 12.00:	Plastic	2,992	31,998	97	99
			Not Specified	975	11,000		
			<u>3,967</u>	<u>42,998</u>			
		Over 12.00:	Plastic)	57,594*	927,423*		
	Combination)						
	Not Specified)						
TOTAL - AUSTRIA					<u>61,561</u>		
Japan:		Up to 3.00:	Plastic)	4,895*	7,708*		
			Metal)				
			Combination)				
		3.01 to 5.00:	Plastic	5,930	23,061		
			Metal	56,051	229,112		
	Combination)	11,474*	48,375*				
	Not Specified)	<u>73,455</u>	<u>300,548</u>				

Item	Country of Origin	Unit Price (\$)	Material	Quantity (No.)	Value (\$)	Import Market Concentration (Market Shares) Importers	
						Top 3 Firms (% of Value)	Top 5 Firms (% of Value)
Eyeglass Frames ⁽¹⁾ (Cont'd)	Japan (Cont'd)	5.01 to 8.00:	Plastic	1,770	10,777	—	—
			Metal	15,947	89,565		
			Combination	20,600	124,462		
			Not Specified	6,840	40,876		
				<u>45,157</u>	<u>265,680</u>		
	8.01 to 12.00:	Plastic	399	3,701			
		Metal	650*	5,990*			
		Combination					
		Not Specified	2,985	29,126			
			<u>4,034</u>	<u>38,817</u>			
	Over 12.00:	Plastic	157*	2,038*			
		Not Specified					
			<u>127,698</u>	<u>614,791</u>	46	63	
TOTAL - JAPAN							
Malta:	Up to 12.00:	Plastic	137	1,242			
		Metal	1,617	14,171			
			<u>1,754</u>	<u>15,413</u>			
	Over 12.00:	Plastic	31,248*	505,470*			
Metal							
			<u>33,002</u>	<u>520,883</u>	100	-	
TOTAL - MALTA							
Switzerland:	5.01 to 12.00:	Plastic	3,750	35,577			
		Not Specified	5,544	51,036			
			<u>9,294</u>	<u>86,613</u>			
	Over 12.00	Plastic	13,248	232,731			
			<u>22,542</u>	<u>319,344</u>	92	100	
TOTAL - SWITZERLAND							

Import Market
Concentration
(Market Shares)
Importers

Item	Country of Origin	Unit Price (\$)	Material	Quantity (No.)	Value (\$)	Importers					
						Top 3 Firms (% of Value)	Top 5 Firms				
Eyeglass Frames ⁽¹⁾ (Cont'd)	Hong Kong:	Up to 3.00:	Plastic	21,776	49,767						
			Metal	4,900*	12,649*						
			Not Specified)					26,676	62,416		
		3.01 to 5.00:	Plastic	34,717	127,933						
			Combination) Not Specified)	11,157*	39,455*						
								45,874	167,388		
		5.01 to 8.00:	Plastic	1,497*	8,931*						
			Not Specified)								
		8.01 to 12.00	Not Specified	87	938						
		Over 12.00	Not Specified	120	2,720						
		TOTAL - HONG KONG						74,254	242,393	47	64
		Australia:	3.01 to over 12.00:	Plastic	15,729*			157,012*			
	Metal										
	Not Specified)										
TOTAL - AUSTRALIA				15,729	157,012	-	100 ^(a)				
Other Countries: ⁽²⁾	Up to 3.00:	Plastic	5,700	14,022							
		Not Specified	343	703							
					6,043	14,725					
	3.01 to 5.00:	Plastic	8,885	35,531							
Metal		2,005	8,625								
Not Specified		6,116	27,236								
				17,006	71,392						

Import Market
Concentration
(Market Shares)
Importers
Top 3 Top 5
Firms Firms

<u>Item</u>	<u>Country of Origin</u>	<u>Unit Price</u> (\$)	<u>Material</u>	<u>Quantity</u> (No.)	<u>Value</u> (\$)		
Eyeglass Frames ⁽¹⁾ (Cont'd)	Other Countries ⁽²⁾ (Cont'd)	5.01 to 8.00:	Plastic	14,688	99,782		
			Metal	386	2,350		
			Not Specified	14,533	95,719		
						<u>29,607</u>	<u>197,851</u>
		8.01 to 12.00:	Plastic	5,539	48,627		
			Not Specified	5,418	50,660		
					<u>10,957</u>	<u>99,287</u>	
		Over 12.00:	Plastic	317	4,862		
			Not Specified	601	8,008		
					<u>918</u>	<u>12,870</u>	
-	-	-	Not Specified	-	1,998		
TOTAL - OTHER COUNTRIES					<u>398,123</u>		
TOTAL - EYEGLOSS FRAMES					<u>15,622,932</u>		
Eyeglass Frame Parts	Fronts:	<u>Country of Origin</u>					
		U.S.A.	87,190	395,572			
		Other Countries ⁽³⁾	<u>14,036</u>	<u>47,185</u>			
TOTAL - FRONTS					<u>101,226</u> <u>442,757</u>		
Eyeglass Frame Parts	Temples:	U.S.A.	193,810	263,246			
		France	21,751	39,221			
		West Germany	31,490	30,804			
		Italy:	8,050	11,511			
			-	6,157			
		Japan	17,526	13,703			
		Other Countries ⁽⁴⁾	<u>18,478</u>	<u>23,052</u>			
TOTAL - TEMPLES					<u>387,694</u>		
TOTAL - PARTS					<u>830,451</u>		
TOTAL - EYEGLOSS FRAMES AND PARTS					<u>16,453,383</u>		

60 79

67 75

NOTES: (a) - Four Importers

(1) - Includes a minimal amount of eyeglass frames indicated as sunglass type (less than 0.25% of the total value of \$15,517,462)

(2) - In descending order of value - Puerto Rico, United Kingdom, Israel, Spain, Netherlands, South Korea, Sweden, India, New Zealand, Singapore, Ireland and Hungary.

(3) - In descending order of value - West Germany, Austria, France, Italy, Hong Kong, Puerto Rico and Japan.

(4) - In descending order of value - Austria, Hong Kong, Spain, Puerto Rico, Switzerland, Australia, Israel, South Korea and Malta.

* - Aggregated in order to preserve confidentiality.

- Material description of Combination is Metal and Plastic.

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

SECTION III

FOREIGN EXPORTERS TO CANADA

Major exporters of products shown in Section II are listed below; they accounted for 68 percent of the total value shown in Section II. The remaining 32 percent consists of companies each representing less than 0.75 percent of the total value of imports shown in Section II.

Austria

Optyl Brillen	Linz
A. Schmied K.G.	Linz

Australia

Martin Wells	St. Marys, N.S.W.
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France

Ets. L'Amy	Morez
Artisanal Design	Bellignat
Ets. Bourgeois & Fils	Morez
Buffard - La Doye	Morez
Lunettes Calamand	Oyonnaz
Esselon Interational	Essel
Essor	Asniere
Lunettes Grasset	Oyonnaz
Lux de Morez	Morez
Marga S.A.	Oyonnaz
M. Morel	Morez

West Germany

Ferdinand Menrad	Schwabisch Gemund
Marwitz & Hauser	Stuttgart
Metzler International	Muehlacker
Rodenstock Corp.	Ebersbert

Italy

Fedon Occiali SPA	Cadore
F.I.L.O.S.	Segusino
Lewis Luxotta (Occhialeria)	Cadore
Marcolin SPA	Cadore
Luxottica SPA	Milan
Luxottica - Agordo	Belluno
Safilo Inc.	Milan

Japan

Murai Optical Co. Ltd.
Nakaniski Optical Prod. Corp.

Fukiou City
Osaka

U.S.A.

American Optical Corp.
Art Craft Optical
Fairfield Optical Export Co. Inc.
Liberty Optical Mfg. Co. Inc.
Martin Copeland Co.
Shuron Textron
Style-Rite International Ltd.
Univis Frame Co.

Southbridge, MA
Rochester, NY
Mansfield, MA
Newark, NY
East Providence, RI
Rochester, NY
Flushing, NY
N. Attleboro, MA

SECTION IV

IMPORT TRENDS

Imports of spectacle and eyeglass frames, Import Class 883-12, by major country of export.

Calendar Years 1974-1979

Country of Export	1974		1975		1976		1977		1978		1979		% GROWTH P.A. 1974-1979	
	000's	\$,000	Qty.	Value										
France	1,211	4,685	1,063	5,352	943	4,413	849	4,465	972	6,761	779	6,795	- 8	+ 8
W. Germany	484	2,862	487	3,683	556	4,293	576	5,198	438	4,944	481	6,909	..	+ 19
Italy	337	1,236	1,819	2,182	520	2,067	674	3,332	892	5,580	996	7,750	+ 24	+ 45
U.S.A.	830	2,188	1,003	2,833	786	2,383	651	3,057	869	4,552	958	5,693	+ 3	+ 21
Other	654	2,230	613	2,548	764	3,350	733	4,003	808	5,534	793	5,343	+ 4	+ 19
TOTAL	3,516	13,200	4,985	16,597	3,569	16,508	3,483	20,056	3,979	27,371	4,007	32,490	+ 3	+ 20

NOTE: .. Less than one percent

SOURCE: Statistics Canada

SECTION V

CANADIAN AND FOREIGN TARIFFS

CANADA

During the period analyzed, eyeglass frames and parts 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>
32800-1	Spectacle and eyeglass frames and parts thereof, n.o.p.	15%	17-1/2%	20%	10%
	GATT		15%		
	From November 19,1974 to June 30,1979.	12-1/2%	12-1/2%	20%	-

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 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 K1A 0H5

Import Analysis
Corporate Systems Branch
Department of Industry, Trade and Commerce
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