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ANALYSIS OF
SYNTHETIC SAUSAGE CASINGS

OCTOBER 1980 TO SEPTEMBER 1981

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Canada

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- REFERENCES: (1) Customs Tariff: Items 1210-1, 93903-82,
93904-1 & 93907-1
- (2) Canadian International Trade Classification
(Cat. #65-502E, Statistics Canada)
- (3) Imports by Commodities
(Cat. #65-007, Statistics Canada)
Commodity Code 144-50

SECTION I

SCOPE OF ANALYSIS

This report is based on a detailed examination of documents covering imports of synthetic sausage casings during the twelve month period October 1980 to September 1981. These products are included in Statistics Canada Import Commodity Code 144-50 "Sausage casings, not elsewhere specified".

CANADIAN PRODUCTION

According to industry sources, synthetic sausage casings are manufactured in Canada, however, Statistics Canada does not provide separate data on production or shipments by Canadian manufacturers. The data is confidential because there are less than the minimum number of Canadian manufacturers.

SECTION II

RECONCILIATION

There is a difference of \$1,112,000 between the reported (analyzed) value of \$10,582,000 by Import Analysis Directorate (IAD) and Statistics Canada's published value of \$11,694,000. This difference is explained as follows:

	Analyzed by IAD <u>(\$,000)</u>	Published by Statistics Canada <u>(\$,000)</u>
Reported (analyzed) Value	10,582	11,694
Difference between Fair Market Value (usually higher value of the two) used by Statistics Canada and Selling Price to Canada (Value used by IAD)	931	
Documents not available for analysis	181	
	<u>11,694</u>	<u>11,694*</u>

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 synthetic sausage casings during the period October 1980 to September 1981 amounted to 1,634,509 pounds valued at \$10,581,771. Seventy-nine per cent of the total quantity of imports shown is apparently, in Statistics Canada terminology "company transfer transactions", i.e. shipments between affiliated firms. The importing firms are distributors to the food industry and are not the final users of synthetic sausage casings.

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

IMPORTS OF SYNTHETIC SAUSAGE CASINGS

OCTOBER 1980 TO SEPTEMBER 1981

Type of Casing	Calibre		Quantity		Value (\$)	REGION OF ENTRY			COUNTRY OF ORIGIN			Import Market Concentration Market Shares	
	(mm)	(inches)	(kg)	(lb)		West of Ontario	Ontario	East of Ontario	USA	West Germany	Other	Top 3 Importers	Top 5 Importers
							(-	% of	Quantity and	Value	-)	
Collagen(Protein)	13 & 18	0.51 & 0.71	11,519	25,395	381,017								
	19	0.75	14,109	31,105	334,051								
	21	0.83	48,674	107,306	1,224,481								
	22 & 23	0.87 & 0.91	134,906	297,412	3,469,433								
	24 to 29	0.94 to 1.14	2,895	6,383	54,249								
	30	1.18	25,422	56,044	583,258								
	32 & 34	1.26 & 1.34	4,226	9,317	64,489								
	35 & 36	1.38 & 1.42	5,255	11,584	60,688								
	38 to 47	1.5 to 1.85	83,535	184,159	880,832								
	50 to 75	1.97 to 2.95	30,968	68,271	334,189								
	80 to 140	3.15 to 5.51	6,896	15,203	106,017								
	-	-	8,326	18,355	165,533								
TOTAL	Quantity		376,731	830,534		*	68	32	60	38	2	93	99
	Value				7,658,237	*	81	18	77	22	1	95	99
Fibrous	40 to 48	1.57 to 1.89	22,007	48,517	254,763								
	50 to 55	1.97 to 2.17	11,785	25,981	153,272								
	58 & 60	2.28 & 2.36	26,229	57,823	299,996								
	65	2.56	2,908	6,411	28,733								
	70 & 75	2.76 & 2.95	16,276	35,882	133,396								
	80	3.15	7,351	16,206	48,901								
	90	3.54	28,961	63,848	261,287								
	100 to 115	3.94 to 4.53	23,369	51,519	179,132								
	120	4.72	6,592	14,533	51,646								
	128 to 165	5.04 to 6.5	10,571	23,305	81,411								
	-	-	1,309	2,886	13,859								
TOTAL	Quantity		157,358	346,911		-	56	44	44	55	*	99	100
	Value				1,506,396	-	52	48	35	65	*	99	100

Type of Casing	Calibre		Quantity		Value (\$)	REGION OF ENTRY			COUNTRY OF ORIGIN			Import Market Concentration Market Shares	
	(mm)	(inches)	(kg)	(lb)		West of Ontario	Ontario (-)	East of Ontario % of	USA	Germany and	Other Value	Top 3 Importers (-)	Top 5 Importers
Plastics ⁽¹⁾	Quantity	-	-	12,994	28,646	1	89	10	82	17	1	99	100 ⁽²⁾
	Value					115,207	1	88	11	75	24	1	99
Regenerated Cellulose	Quantity	-	-	192,628	424,664	-	(3)	(3)	64	14	21	100	-
	Value					1,233,032	-	(3)	(3)	59	17	24	100
Textile		43 & 60	1.69 & 2.36	479	1,057								
		65 to 80	2.56 to 3.15	415	916								
		90 to 110	3.54 to 4.33	799	1,761								
		-	-	9	20								
TOTAL	Quantity			1,702	3,754	60	40	-	-	100	-	86	100 ⁽²⁾
	Value					68,899	58	42	-	100	-	83	100 ⁽²⁾
GRAND TOTAL	Quantity			741,413	1,634,509	*	(3)	(3)	58	35	6	78	95
	Value					10,581,771	*	(3)	(3)	68	28	4	81

NOTES: Other Countries of Origin: Austria, Belgium, Italy, People's Republic of China, Spain and Switzerland.

* Less than one per cent. All figures are rounded

(1) Plastic casings: Polyamide, Polyester, Polypropylene and others not further identified.

(2) Four Importers

(3) Confidential

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

SECTION IV

FOREIGN EXPORTERS TO CANADA

Exporters to Canada of products shown in Section III are listed below in descending order of quantity by country or by group of countries. The exporters listed accounted for 98.6 per cent of the total quantity of imports during the period analyzed.

		<u>Quantity</u> (000 lb)
<u>UNITED STATES</u>		
Teepak Inc.	Danville, IL	946
Devro Inc	Lubbock, TX	
The Brechteen Co.	Mt. Clemens, MI	
<u>WEST GERMANY</u>		
Kalle Actiengesellschaft (Subsidiary of Hoechst A.G.)	Wiesbaden-Biebrich	490
Naturin-Werk Becker & Co.	Weinheim	
H. Knittel K.G.	Ludwigshafen	
<u>BELGIUM</u>		
Teepak Produktie N.V.	Lommel	
<u>SWITZERLAND</u>		
Elastin-Werk Aktiengesellschaft	Triesen	176
<u>PEOPLE'S REPUBLIC OF CHINA</u>		
China National Native Product	Shanghai	

SECTION V

CANADIAN AND FOREIGN TARIFFS

CANADA

During the period analyzed, synthetic sausage casings included in this analysis were dutiable under the following most commonly applied tariff items.

<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>
1210-1	Sausage casings, synthetic, of paper					
	1980	10%	15%	35%	10%	13%
	1981	10%	15%	35%	10%	13.2%
	93903 - Regenerated cellulose; cellulose nitrate, cellulose acetate and other cellulose esters, cellulose ethers or other chemical derivatives of cellulose, plasticised or not (for example, collodions, celluloid); not including vulcanised fibre:					
93903-82	Regenerated cellulose ...					
	1980	10%	14.7%	25%	9.5%	12.5%
	1981	10%	14.4%	25%	9.5%	12.5%
93904-1	Hardened proteins (for example, hardened caseins and hardened gelatin)					
	1980	9.8%	9.8%	20%	6.5%	9.8%
	1981	9.6%	9.6%	20%	6.5%	9.6%
93907-1	Articles of materials of the kinds described in headings 93901 to 93906 inclusive, n.o.p.....					
	1980	15%	17%	30%	11%	15%
	1981	15%	16.5%	30%	11%	15%

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 concering 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