

Respondents interested in Canadian suppliers most frequently identified brochures (95.7%), industry publications (67.4%), personal contact by the company (63%) and contact by a manufacturer's representative (50%) as the preferred means of obtaining preliminary product information. Key factors in the purchasing decision are recommendations from personal contacts, distributors, and manufacturers.

On average, almost 63% of the importers surveyed reported that the imports were for use in the industrial market sector, almost 18% in the household/retail sector and almost 17% in the janitorial and institutional sectors. A small remainder is used in the wholesale and agricultural sectors. The average dollar volume of imports for survey respondents of chemical specialties in 1988 was \$4.9 million (U.S.). One of the respondents who did not import in 1988 but imported previously noted that its most recent dollar volume of imports relating to chemical specialties was \$240 million (U.S.).

The respondents appear to import only a small percentage of their sales volume. The average annual sales dollar volume of chemical specialties products in 1988 was approximately \$305.6 million (U.S.). The majority (62.1%) of respondents had annual sales of \$10 million (U.S.) or less. The respondents noted that almost 42% of sales, on average, of their chemical specialties products are destined for use in the industrial market sector. Another 20% of sales on average are in the household/retail sector and 17% and 11% of sales on average are in the institutional and janitorial sectors, respectively. Other reported market sectors were wholesale, agricultural, and pharmaceutical.

Trade fairs serving the chemical specialty sector as identified by the respondents are the "International Sanitary Supply Association", and "Chem-Mart". Industry publications most frequently read by respondents include *Chemical Week*, *Chemical Marketing Reporter*, *CPI Purchasing* and *Purchasing World*.

Most of the respondents (82.6%) interested in Canadian suppliers reported that they faced no barriers to sourcing products from Canadian manufacturers of chemical specialty products. The respondents that did cite barriers referred to tariffs, delivery time (customs clearance) and distance. The Canada-U.S. Free Trade Agreement will remove tariffs on imports from Canada over a ten-year period commencing January 1, 1989.