

## **EXECUTIVE SUMMARY**

This report addresses one of approximately 80 sectors reviewed as part of a broadly-based study commissioned by the U.S. Trade, Tourism and Investment Development Bureau of External Affairs and International Trade Canada. The objective of this study is to provide a preliminary indication of potential opportunities for the expansion of Canadian exports into the United States. The findings in each report are based on an analysis of U.S. trade statistics and a limited survey of U.S. importers and trade associations from a broad cross-section of U.S. industry.

The purpose of each report is to assist Canadian companies in identifying potential export opportunities that may justify further investigation. While the reports do not provide analyses of Canadian export industries or their international competitiveness, they do provide other kinds of information that should be useful. For example, each report provides information on individual companies that have indicated an interest in new sources of supply, some of which is quite specific. Information on U.S. import market size and shares, and on industry publications and trade fairs that the companies surveyed felt were most useful, is also provided. As such, individual reports in the series should be of particular interest to small and medium-sized Canadian companies that either are not yet exporting, or that would like to increase their level of exports to the United States.

Printing is one of the sectors examined during the study. U.S. shipments of printed material, based on information provided by the USDOC, are a composite of U.S. shipments for newspapers, periodicals, book publishing and commercial printing. Total industry shipments in 1988 for these products is estimated at approximately \$ 110 billion (U.S.). It is expected that the U.S. market for printing will experience growth over the longer term. The longer-term development of the printing industry will depend on growth in the demand for advertising and increased levels of library and educational funding.

A survey of U.S. importers of products printed outside of the United States was conducted to determine the effects of the devaluation of the U.S. dollar on these imports from major developed countries and potential opportunities for Canadian companies to replace these imports. The survey revealed that almost 35% of the respondents were facing rising costs for their imports of printed material as a result of the devaluation of the U.S. dollar. A large number of these importers were interested in hearing about Canadian sources of printing services and printed products. Importers