

imports growing at an average annual rate of 20.7% during the same period, to reach \$76.1 million (U.S.) in 1987. The major competitors are the United Kingdom and West Germany.

The largest U.S. market for chemicals and chemical products is "Cyclic organic products, nspf" (Schedule A 5172015), with total imports at \$974.8 million (U.S.) in 1987. This is a residual category which includes items such as cyclohexane,\* refined naphthalene, alpha-methyl styrene and pyrogallol. Products specifically excluded are all organic products derived from coal tar, styrene, phthalic anhydride, phenol or carbolic acid and benzenoid compounds. The value of U.S. imports of this product group increased at an average annual rate of 16.7% between 1982 and 1987, with import volumes growing at a greater rate. The largest single increase in imports of cyclic organic compounds occurred in 1983 when it rose by 75%. However, this was not complemented with a similar rise in the value of imports, which grew at a more moderate 27%. The major competing exporters are Japan and West Germany.

U.S. imports of chemical products and preparations covered under Schedule A 5985020 were roughly \$471 million (U.S.) in 1987, down 30% from its high in 1985. While Japan, Canada and European countries all increased their value of exports to the U.S. market in 1986 and 1987, U.S. imports from other countries dropped 87%, resulting in the decline in total U.S. imports. The major competitor is Japan.

Total imports of aromatic, odoriferous and flavouring compounds (Schedule A 5173400) exceeded \$99 million (U.S.) in 1987, a decline of 38% from roughly \$161 million (U.S.) in 1985. Europe and Japan have maintained a dominant market position by supplying nearly 89% of U.S. imports in 1986. Japan led all suppliers with a 65.7% share, while the United Kingdom, Italy, Switzerland, Germany and the Netherlands are among the larger European suppliers. In general, the average price per pound for imports of aromatic, odoriferous and flavouring compounds from Japan has been four to five times higher than for imports from Europe, suggesting a large difference in the type and/or mix of products U.S. importers are receiving from each of these two

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\* This product group includes both specialty chemicals and commodity chemicals such as cyclohexane. For some of these commodity chemicals, there are limited export opportunities due to limited sources of supply. Readers of this report who produce the specialty chemicals classified in this product group should be aware that commodity chemicals and other specialty chemicals belonging to this product group may account for a large proportion of the U.S. imports reported.