

- the effect of the devaluation of the U.S. dollar on trade in the U.S. printing industry;
- major industry trade fairs;
- major industry publications;
- the potential effect of Free Trade on Canada-U.S. trade in printing products;
- their opinion on the strengths and weakness of the Canadian printing industry.

Interview Results

All four associations are projecting increases in sales dollar values through 1990. While the NBFA notes that business forms sales will increase by 6-10% in 1990 as a result of demand from the small computer market, the IBFIA believes that the growth will be only 2-3% over the 1989-90 period because electronic exchange has replaced the business forms medium. The PIA and the NAPL note that real dollar growth will continue in 1990 and, perhaps, into 1993 and should be around 1.5%.

Neither the IBFIA nor the PIA believe that the devaluation of the U.S. dollar should have a significant impact on trade in printed products. The IBFIA noted that business forms are not highly specialized and thus there is not a high demand for exports of business forms to other countries. The PIA indicated that if there were an impact, it would probably be felt in the books and magazines sectors.

With respect to the Free Trade Agreement between Canada and the United States, the perception of the associations are mixed. The IBFIA and the PIA are of the opinion that in the short term, U.S. exports to Canada will increase. The PIA believes that printing industries located near the Canadian border, such as in Buffalo and Detroit, should benefit from the Free Trade Agreement. The IBFIA believes that the phasing out of tariffs will give the advantage to U.S. firms which will have a greater relative reduction in tariffs into Canada. The NBFA believes that there will be more benefits for U.S. firms exporting to Canada because it maintains that there are more manufacturers in the United States and that these manufacturers have more capabilities to produce a wider variety and more complex products. The PIA noted that there is more flexibility in the U.S. print industry