

Approximately 77% of the respondents categorized their business as industrial sector, e.g., motor vehicle finish manufacturing or industrial paints. Just under 16% classified their business as retailing/trade (e.g., decorators or painting contractors), while the remainder comprised customs brokers, forwarders, distributors and wholesalers. For these respondents, the average annual sales dollar volume of their products and services which are or relate to colours, dyes, paints and varnishes was approximately \$17.3 million (U.S.). The majority (55.6%) had annual sales exceeding \$10 million (U.S.). While the annual sales dollar volume is substantial, the dollar volume of imports relating to colours, dyes, paints and varnishes is much less. The average dollar volume of imports relating to colours, dyes, paints and varnishes in 1988 was \$2.46 million (U.S.). For those respondents who did not import in 1988 but imported previously, the average most recent dollar volume of imports relating to colours, dyes, paints and varnishes was \$1.75 million (U.S.).

Only a minority of the respondents (21.1%) reported that their business or organization was the end user of the colour, dye, paint and varnish products. In regard to the end uses of the colours, dyes, paints and varnishes products, respondents most frequently identified motor vehicles and furniture (39.7% each), appliances and machinery (29.3% each) and packaging (22.4%) as end use applications. Other reported end uses were home paint, printing, textiles, cosmetics and ceramics.

The results of the survey showed that the majority of the respondents were satisfied with their suppliers while some expressed dissatisfaction with delivery delays and the variability of the products' quality. The reasons given for purchasing from current suppliers included:

- not available in the United States (51.3% of respondents);
- superior quality (15.4% of respondents);
- supplementary to domestic sources (10.3% of respondents);
- lower prices (7.7% of respondents).

The majority of the respondents interviewed (54.7%) reported that the devaluation of the U.S. dollar against many currencies had increased the cost of their imports. However, 11.9% of respondents did not know the effects of the devaluation of the dollar on the cost of their imports. While half of the importers had not used Canadian sources of supply, almost all who had tried