



## US&FCS Market Research Reports

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### PET FOOD

Industry Sector Analysis [ISA]

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Regions: **WH;Western Hemisphere;North America**

Country: **Canada**

Industry: **Consumer Goods & Home Furnishings**

Sector: **Pet Foods/Supplies**

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### SUMMARY

The world pet food market was valued at approximately US\$ 25 billion in 1997. North America and Western Europe accounted for almost 80 percent of volume sales. All aspects of the North American pet food market are very closely related, including raw materials, manufacturing, consumer demographics, products and import and export markets. U.S. regulations, for both ingredients and nutritional claims, are more specific and extensive than those in Canada and usually take precedence.

The severely competitive Canadian pet food sector has experienced considerable

consolidation. Currently, it is largely controlled by a few large U.S. owned multinationals that manufacture their own brands and private label products, mostly through facilities in the United States.

## CANADIAN MARKET OVERVIEW

The pet industry is booming in Canada, with total sales estimated at US\$ 1.2 billion for 1999, including food, accessories and veterinary costs. The Canadian pet food sector has consolidated and is largely controlled by U.S. based multinationals. The Canadian pet food market is an estimated US\$ 505 million annually. Between 85 percent and 90 percent of the pet food sold in Canada is manufactured by the large U.S.-owned multinationals, often in the U.S. The major player in this industry controls over 25 percent of the total dog food market. The multinational producers have strong brands, while the Canadian owned companies combine brand and private label production.

Nationally Canada has approximately 17 pet food manufacturers, of which only four are canning operations. With many diverse processes required to make different pet foods, manufacturers generally specialize in this industry. Dried, canned, semi-moist and specialty treat product manufacturers are rarely located in one location. Pet food production capacity is concentrated in Ontario; however, there are a number of small to medium sized firms spread across the country.

Canadians currently own a total of eight million dogs and cats. According to Statistics Canada, there are approximately 3.5 million dogs and 4.5 million cats in the country. In fact, about half of all households have at least one pet, and pet owners are spending an average of US\$ 296 per year on their pets. The Prairie Provinces of Alberta, Manitoba and Saskatchewan lead the way in pet ownership, followed by the Maritime provinces, British Columbia, Ontario and Quebec in descending order.

In comparison, surveys suggest that 36 million U.S. homes have at least one dog and another 31 million U.S. homes have at least one cat.

## MARKET TRENDS

As with many market changes, demographics, specifically the baby boomers, are driving the changes in the pet food industry. Empty-nesters are replacing their kids with pets. Baby boomers, increasingly childless and living in much smaller households than previous generations, are purchasing pets as companions.

The new generation of pet owners are very discriminating and both willing and able to pay top dollar for premium products. They are concerned about their pets' health and welfare. However, trends in pet foods lag behind human food trends by approximately two years. This explains the recent movement towards light diets and a greater interest in nutrition, as well as "health" and "specialty" foods using terms such as "low-cal" or "light". Keeping that in mind, emerging trends in the pet food market include:

- Focus on nutrition - not just ingredients;
- Interest in low calorie or light products;
- Increased availability of nutraceutical products, with supported health claims;
- and,
- Gourmet and specialty pet foods

Over the last decade, sales in the pet food industry have been relatively flat across North America with a trend moving from regular to premium and super premium foods. This preference for upscale food is expected to remain and may be further refined with diet specific premium and nutraceutical product entries. Products are specialized according to the stages in an animal's life. Many companies consult with nutritionists or veterinarians when formulating a product. Some foods are being produced to the specifications of veterinarians for sale through veterinary clinics. Typical brands sold by veterinarians include Hill's Science Diet, Iams/Eukanuba, Waltham, Purina (veterinary line), and MediCal.

Premium pet food is also sold by specialty pet retail outlets in Canada. Key brands include: Hill's Science Diet; Iams/Eukanuba; Techni-Cal (Martin Pet Foods/H.J. Heinz of Canada); Nutro Max (Nutro Products); Pro-Plan

(Ralston-Purina); Opti-Plus (Shur-Gain/Division of Maple Leaf Foods); Nutram (Maple Lodge Farms); Alpo and Friskies (Nestles); Vital (Derby/Division of Sunpac Foods); Pedigree (Effem/Mars), and Nutrience (Rolf C. Hagen).

Categories that have shown major recent gains include sales of dry pet foods with particular interest in chicken, rice, vegetable based products and in larger sizes. Dog snacks also appear to be a major gain area, with Canadian dog snacks showing a reported increase of 10 percent to approximately US\$ 24 million in recent years.

Overall, pet food industry volume in Canada is expected to grow between 1 percent and 2 percent a year over the next few years.

Shopping trends have changed markedly. Until the early 1980's supermarkets held a 95 percent market share for pet food sales, but over the last 10 to 15 years that share has fallen sharply to approximately 51 percent. Sales through veterinarians offices and pet stores selling the super premium products have made the largest gains. Then non-grocery outlets including mass marketers gained market entry by offering discounts and volume buying and within the last few years. Pet superstores entered the arena and have attracted a following of childless and affluent pet owners.

Pet superstores are becoming more popular and are likely to become more so in the future. There are about 40 "large space" pet stores, which are a minimum of 5,000 square feet, in Canada. In order to compete with grocery stores, pet superstores are trying to be all things to all pets in order to win business. Petcetera, which is part owned by PETCO Animal Supplies Inc., the second largest pet supplies company in the U.S., made its Canadian debut in 1998, opening a 26,000 square-foot superstore in Vancouver. Another pet superstore that has found success in Canada is Arizona-based PETsMART, the largest pet store chain in North America, with operations in the U.K. as well. Many Canadians who vacation in the United States recognize the PETsMART name, and the company plans to build more customers on that familiarity.

Although superstores have a size advantage, smaller operations have greater

choice and flexibility when looking for locations. Ontario-based Pet Valu Canada Inc. strategically places its outlets near grocery and convenience stores in local plazas. As Canada's largest pet specialty chain, with 230 small corporate and franchise locations, and its own line of budget-priced pet food and supplies, Pet Valu reports competing superstores have had a limited impact on their sales.

When discussing pet supply stores, both big and small, industry experts have mixed opinions on potential growth in the market. Some view the industry in Canada as mature, while others feel it will be a vibrant industry for years to come. Some experts feel the province of Ontario, in particular, is saturated with pet food and supply stores, but see potential for growth in both British Columbia and Alberta.

#### IMPORT MARKET

Canadian pet food imports substantially exceed exports and supply roughly one-half of the total Canadian pet food market. Total Canadian imports of dog and cat food (HS230910) in 1999 amounted to US\$206 million. Imports from the U.S. alone totaled US\$199 million, which accounted for 97 percent of the import market in this category during 1999. Canadian imports of US\$79 million during January through April, 2000 were running 24 percent ahead of levels during the same time frame a year earlier, with the United States supplying 98 percent of these imports.

Canada's largest export market for dog and cat food (HS230910) is also the United States. During 1999, Canada exported a total of US\$135 million, of which US\$106 million was exported to the U.S., or 79 percent of the export market. The next closest country for exports in this category was Japan, at US\$6.5 million, followed by Czech Republic at US\$3.2 million. Canadian exports of dog and cat food (HS230910) for the first three months of 2000 were US\$34 million, of which 78 percent went to the U.S. The next largest export market for Canada was Japan, accounting for US\$3 million during that same time period.

It is predicted that the U.S. will continue to be the major export market for

pet food for Canada, but the greatest long-term opportunities for export growth are expected to be in Japan, other Pacific Rim countries, and the European Union. Asian markets are underdeveloped in terms of pet populations, and the diffusion of prepared pet food. Pacific Rim countries also lack the raw materials for pet food production, so the increasing market demand is being satisfied by imports. Canada has the raw materials from the grain and meat processing industries to produce pet food and could prove to be a formidable competitor to U.S. firms in this sector.

These figures suggest that United States pet food manufacturers are well positioned to continue to dominate the Canadian market both through exports and through sales by their Canadian manufacturing affiliates.

## COMPETITION

The market for mainstream, utilitarian dog and cat foods is saturated and consequently, intensely competitive. In this industry, quality and innovation are important distinguishing characteristics and producing niche products could be a successful strategy. Manufacturers can enhance the appeal of their products by emphasizing ties with veterinarians and nutritionists. In addition to unique product characteristics, distributors and retailers are looking for:

healthy margins;  
strong product support including adequate stocks;  
aggressive advertising, marketing and sampling programs; and,  
exclusive distributorships.

Price is a secondary consideration, but cannot be underestimated. With the persistent weakness in the Canadian dollar over the past several years, goods imported from the United States have suffered a significant cost disadvantage and are more expensive for the Canadian consumer.

## Distribution

Major producers of pet food use various distribution channels. Some have their

own private distributors for the Canadian market, some sell directly to retail chains, outlets and veterinarians, and others sell directly to the consumer via mail order. For the most part, however, they use a full-line of distributors to cover the geographic and regional distances of the Canadian market. Although there are a few country-wide distributors of pet food, most distributors are regionally based. A new-to-market U.S. manufacturer should develop relationships with several full-line distributors selected on the basis of geographic coverage.

Retail competition in the market is very stiff. Most pet stores feel their major competition is with the grocery stores, rather than with other pet food and supply stores, either big or small. Several years ago, grocery stores were responsible for 85 percent of retail sales of dog and cat food. According to surveys conducted, grocery stores now have approximately 51 percent of the pet food sales market, while pet stores sell about 32 percent of all pet food. Although 51 percent is a large percentage, the grocery stores are losing ground in the market to specialty pet stores. The availability of a variety of pet products and higher-end foods has attributed to this drop in percentage for the grocery stores. Manufacturers tend to avoid marketing their high-end products through grocery stores.

When super premium brands came onto the market, big high-end names stopped selling their products in grocery stores and started marketing through veterinarians. When specialty pet stores came on board, the manufacture of private label foods began, and now we are seeing the pet superstore chains as a popular spot for consumers to shop for their cherished pets.

Grocery stores are continually under pressure to retain market share, while the specialty pet food stores are seeing the biggest gain in market penetration. Hence, grocery stores are now promoting their one-stop shopping advantage to consumers, as well as trying to increase the variety and quality of product offered in their stores.

Pricing

Retail prices for pet foods have been essentially flat over the past decade. Cheaper brand foods and private label foods are available through grocery stores, membership clubs, mass merchandisers, feed stores and other retail outlets across Canada. The specialty pet food retail outlets carry some less expensive brands and private label foods, but focus their inventory on the more expensive super premium and special diet brands such as Iams/Eukanuba. Veterinarians carry the highest end specialty foods at their practices throughout the country.

According to an informal price survey done in the late 1990s by a maker of direct mail order super premium line of dog and cat food revealed that the cost per month (in Canadian dollars) of dog food could range from CDN\$ 33.94 for a brand that is home delivered to CDN\$ 55.44 for Ken-L Ration/Kibbles 'n Bits. Among other brands included in the survey were Pedigree/Mealtime with Lamb & rice (CDN\$ 34.15), Eukanuba/Original Premium (CDN\$ 34.55), Science Diet/Lamb Meal & Rice (CDN\$ 35.43), Purina Pro-Plan/Adult (CDN\$ 38.62), and Eukanuba/natural (CDN\$ 51.20). The costs per month of the different brands were derived from comparing the relative package sizes, cost per package and the suggested feeding per day (cups per day). Note: the exchange rate at the time of this study was approximately CDN\$1 = US\$0.6743.

## BEST SALES PROSPECTS

Major opportunities to capitalize on new market segments include both niche and mainstream products. Potential buyers include existing local and international processors as well as new entrepreneurs.

### Pet Treats or Snacks

Pets are increasingly considered a member of the family, and 73 percent of dog owners and 35 percent of cat owners in Canada regularly purchase treats for their furry friends. Purchased on impulse for birthdays, holidays and everyday snacking, the treats come in a variety of shapes, sizes and flavors - bone biscuits, jerky treats, strips, sausages. Pet snacks or pet treats present opportunities for smaller companies to capture the discretionary dollars that



pet owners are willing to spend on their pets. Treats that can be shared with humans may also provide processing and marketing opportunities.

### Niche Markets

Gourmet Foods: Opportunities exist to market premium or gourmet lines through specialty stores.

Transferred Human Food Trends: Pet owners frequently feed pets food scraps from their own table, meat, cereals, etc. This represents an opportunity to transfer, or capitalize on human food trends and niche market variations on the standard pet food offerings - moist pasta pellets mixed with standard nuggets. At least one company is already producing a pasta and nugget pet food product in the United States.

Healthy "Good for You": Pet owners are increasingly concerned with their pets health and nutrition. A pet food manufacturer concentrating on white and the alternative "red" meat, pork, could market lower fat, higher protein pet foods to concerned pet owners. Chicken is already proving popular in the dry dog food category. Similarly products utilizing healthy ingredients, eggs, milk, flour, possibly even organic products, should prove popular with pet owners. Diet specific and nutraceutical products should also provide opportunities for U.S. manufacturers wanting to access the Canadian import market.

### MARKET ACCESS

#### Standards/Certification

The following federal government departments are involved with the regulation of pet food:

The Canadian Food Inspection Agency regulates the movement of inedible meat products and administers legislation requiring the certification of certain imported pet foods containing animal products.

Health Canada administers legislation prohibiting unsubstantiated health claims in the advertising and labeling of pet food.

The Competition Bureau of Industry Canada administers legislation requiring that prepackaged pet food destined for retail consumption be labeled with a bilingual common name, metric net quantity declaration and dealer name and address. The legislation also prohibits false and misleading representations and deceptive marketing practices.

U.S. pet food exporters should note new information due to a past controversy in Canada over false or misleading advertising and labeling of pet food. On May 10, 2000, The Competition Bureau issued a revised Consumer Packaging and Labelling Act and Competition Act with regards to pet food labeling and advertising. The document is available on <http://strategis.ic.gc.ca/SSG/cp01141e.html>, which contains the draft "Guide for the Labelling and Advertising of Pet Foods". The guide includes a set of general principles for pet food labeling, guidance on using specific nutritional claims, and examples of acceptable claims. The examples illustrate the type of claims U.S. manufacturers may wish to use to conform to Canadian guidelines. Adherence to the guide will also help ensure that consumers are provided with enough clear and pertinent information to allow them to make informed purchasing decisions. It also provides useful information for the consumer on how to understand the references to various ingredients and descriptors used in the common name of the pet food product.

The Bureau prepared the guide in collaboration with several governmental and non-governmental organizations including: Health Canada; Agriculture and Agri-Food Canada; Pet Food Association of Canada; Canadian Veterinary Medical Association; Canadian Kennel Club; Canadian Animal Health Institute, and the Pet Industry Joint Advisory Council. The guidance provided in the document is consistent with existing Canadian and U.S. voluntary standards administered by the Pet Food Association of Canada, the Canadian Veterinary Medical Association, and the Association of American Feed Control Officials Inc.

## NAFTA

With the advent of the North American Free Trade Agreement (NAFTA), dog and cat

food may enter Canada free of duties as of January 1998. Since the implementation of the United States-Canada Free Trade Agreement in 1989, trade in pet food has grown substantially and the pet food industry in Canada has increasingly operated in a North American and global environment. Multinational manufacturers production in Canada has decreased, and direct shipments from the United States to Canada have increased. Traditionally, Canada has been a net importer of dog and cat foods. As a result of agreement, the border between the United States and Canada provides little obstacle to U.S. exporters of dog and cat food.

The Canadian Veterinary Medical Association (CVMA) operates a voluntary pet food certification program for pet food manufacturers that sets basic quality standards. Manufacturers voluntarily submit their pet foods for testing based on the CVMA nutritional and digestibility standards. Once the food achieves certification, it is repeatedly tested to ensure it consistently meets CVMA nutritional standards and maintains its level of quality. The CVMA seal of certification can then be displayed on the packaging. Participating manufacturers must pay the cost of testing their foods. They also contribute voluntarily to a public education budget which provides funding for nutritional seminars and educational literature for veterinarians, breeders and pet owners. All money received from the manufacturers is forwarded to independent testing laboratories or used for administration purposes.

The program exists to improve the health and well-being of pets by:

- providing a nutritional standard for pet foods in order to satisfy the nutritional requirements of a normal pet;
- certifying pet foods that satisfy the CVMA nutritional standards and monitoring those foods to ensure that they continue to meet the standards for composition, digestibility and palatability;
- providing the consumer with an independent quality assurance program and a means of identifying a nutritionally-sound pet food in the marketplace;
- having the CVMA seal of certification become synonymous in the public's mind with quality and integrity, by ensuring that all advertising statements are fairly presented and can be supported by the advertiser; and

helping pet owners understand the importance of proper nutrition in preventative pet health care.

#### KEY CONTACTS

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Healthy Choice Pet Treats  
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Hill's Pet Nutrition Canada Inc.  
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Can-Pet Distributors Inc.  
84 Doney Cres.  
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Tel: (905) 738-3663  
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Conrad Wholesale Inc.  
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Pan Pacific Pet Ltd.  
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#### PUBLICATIONS/MAGAZINES

Canine Health Naturally  
P.O. Box 69, Dept. CP  
Lions Bay, British Columbia V0N 2E0  
Tel: (604) 921-7784  
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Canine Review  
S.S. 2, Site 4, Comp. 22  
Beaton Road  
Kamloops, British Columbia V2C 6C3  
Tel: (250) 828-1978  
Fax: (250) 828-0052  
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## UPCOMING SHOWS

All About Pets  
March, 2001  
International Center, Mississauga, Ontario  
Type of Show: Consumer  
Products Displayed: Products and services for pets, pet owners and potential pet owners.  
Attendance: 40,000  
Exhibitors: 200  
Show Manager: Claudio Demarchi  
Show Organizer: Showtrends  
1096 Montgomery Dr.  
Oakville, Ontario L6M 1G1  
Phone: (905) 827-0012  
Fax: (905) 827-1935  
Toll Free: 1-800-250-3080  
Website: [www.showtrends.com](http://www.showtrends.com)

Canadian Pet Expo  
October, 2000  
Queen Elizabeth Building, Exhibition Place, Toronto, Ontario  
Type of Show: Consumer  
Products Displayed: Pets, pet products, services, health care, training and education on responsible pet ownership.  
Attendance: 30,000  
Exhibitors: 150  
Show Manager: C. J. Cowan  
Show Organizer: Regional Shows Inc.  
100 Sandiford Dr., Unit 41

Stouffville, Ontario L4A 7X5

Phone: (905) 642-2422

Fax: (905) 642-2660

PIJAC Canada National Pet Industry Trade Show

September, 2001

Toronto Congress Center, Toronto, Ontario

Type of Show: Trade

Products Displayed: Products and services relating to the pet industry, both dry goods and livestock.

Attendance: 2,500

Exhibitors: 200

Show Manager: Bob Stevens

Show Organizer: PIJAC (Pet Industry Joint Advisory Council) Canada

2442 St. Joseph Blvd., Ste 102

Orleans, Ontario K1C 1G1

Phone: (613) 834-2111

Fax: (613) 834-4854

Email: [pijac@odyssee.net](mailto:pijac@odyssee.net)

Website: [www.pijaccanada.com](http://www.pijaccanada.com)

#### CONTACT US!

U.S. firms wishing to make contacts in the Canadian marketplace can do so via the United States Commercial Service. One ideal service suitable for many U.S. exporters is USCS's Gold Key service.

CS's unique Gold Key service enables U.S. firms to travel to major Canadian cities and meet one-on-one with prospective agents, distributors, and buyers. CS trade specialists arrange pre-screened appointments for each Gold Key client's representative to develop an understanding of the market and to establish potentially beneficial business contacts. The Gold Key service program is available at the convenience of the U.S. firm, or may be timed to coincide with the company's participation in a local trade event. The Gold Key service is available at all Commercial Service offices across Canada.

The U.S. Commercial Service also offers a variety of resources and services (including market research, agent/distributor searches, corporate matchmaking etc.) to assist U.S. companies entering new markets.

#### U.S. COMMERCIAL SERVICE (CANADA) OFFICE LOCATIONS

For further information or assistance, please contact the appropriate regional office listed below, or visit the U.S. Commercial Service in Canada on the world wide web at <http://www.usatrade.gov/canada>. Our Canada events and related on-line information in Canada can be found at <http://www.missionminder.com/>

##### Region I - The Atlantic Provinces:

U.S. Commercial Service

Halifax, Nova Scotia

Tel: 902-429-2482

Fax: 902-429-7690

E-mail: [halifax.office.box@mail.doc.gov](mailto:halifax.office.box@mail.doc.gov)

##### Region II - The Province of Quebec

U.S. Commercial Service

Montreal, Quebec

Tel: 514-398-0673

Fax: 514-398-0711

E-mail: [montreal.office.box@mail.doc.gov](mailto:montreal.office.box@mail.doc.gov)

U.S. Commercial Service

Quebec City, Quebec

Tel: 418-692-2087

Fax: 418-692-4640

E-mail: [quebec.office.box@mail.doc.gov](mailto:quebec.office.box@mail.doc.gov)

##### Region III - The Province of Ontario



U.S. Commercial Service  
Ottawa, Ontario  
Tel: 613-688-5217  
Fax: 613-238-5999  
E-mail: ottawa.office.box@mail.doc.gov

U.S. Commercial Service  
Toronto, Ontario  
Tel: 416-595-5412  
Fax: 416-595-5419  
E-mail: toronto.office.box@mail.doc.gov

#### Region IV - The Prairie Provinces and the Northwest Territories

U.S. Commercial Service  
Calgary, Alberta  
Tel: 403-265-2116  
Fax: 403-266-4743  
E-mail: calgary.office.box@mail.doc.gov

#### Region V - The Province of British Columbia and the Yukon Territory

U.S. Commercial Service  
Vancouver, British Columbia  
Tel: 604-685-3382  
Fax: 604-687-6095  
E-mail: vancouver.office.box@mail.doc.gov

#### CANADA FIRST MESSAGE FROM THE U.S. COMMERCIAL SERVICE

The Canadian market, in particular, represents a good "first step" for new-to-export companies seeking a new and exciting opportunity, and we welcome the chance to assist you. Think "Canada First!"

If this report has alerted you to a commercial opportunity in Canada, and you

subsequently pursue it with successful results, please let us know. We track U.S. successes in Canada and want to know how our market reports and services are being used.

### ISA Customer Satisfaction Survey

U.S. Department of Commerce  
\* International Trade Administration\*  
The Commercial Service

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The U.S. Department of Commerce would appreciate input from U.S. businesses that have used this ISA report in conducting export market research. Please take a few moments to complete the attached survey and fax it to 202/482-0973, mail it to QAS, Rm. 2002, U.S. Department of Commerce, Washington, D.C. 20230, or Email: Internet[Opfer@doc.gov].

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\* \* \* About Our Service \* \* \*

1. Country covered by report: \_\_\_\_\_

Commerce domestic office that assisted you (if applicable):  
\_\_\_\_\_

2. How did you find out about the ISA service?

Direct mail

Recommended by another firm

Recommended by Commerce staff

Trade press

State/private newsletter

Department of Commerce newsletter

Other (specify): \_\_\_\_\_

3. Please indicate the extent to which your objectives were satisfied:

1-Very satisfied

2-Satisfied

3-Neither satisfied nor dissatisfied

4-Dissatisfied

5-Very dissatisfied

6-Not applicable

Overall objectives

Accuracy of information

Completeness of information

Clarity of information

Relevance of information

Delivery when promised

Follow-up by Commerce representative

4. In your opinion, did using the ISA service facilitate any of the following?

Decided to enter or increase presence in market

Developed an export marketing plan

Added to knowledge of country/industry

Corroborated market data from other sources

Decided to bypass or reduce presence in market

Other (specify): \_\_\_\_\_

5. How likely would you be to use the ISA service again?

Definitely would

Probably would

Unsure

Probably would not

Definitely would not

6. Comments:

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\* \* \* About Your Firm \* \* \*

1. Number of employees:  1-99  100-249  250-499  
 500-999  1,000+

2. Location (abbreviation of your state only): \_\_\_\_\_

3. Business activity (check one):

Manufacturing

Service

Agent, broker, manufacturer's representative

Export management or trading company

Other (specify): \_\_\_\_\_

4. Export shipments over the past 12 months:

0-1  2-12  13-50  51-99  100+

May we call you about your experience with the ISA service?

Company name: \_\_\_\_\_

Contact name: \_\_\_\_\_

Phone: \_\_\_\_\_

Thank you--we value your input!

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This report is authorized by law (15 U.S.C. 1512 et seq., 15 U.S.C. 171 et seq.). While you are not required to respond, your cooperation is needed to make the results of this evaluation comprehensive, accurate, and timely. Public reporting burden for this collection of information is estimated to average ten minutes per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the

data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing the burden, to Reports Clearance Officer, International Trade Administration, Rm. 4001, U.S. Dept. of Commerce, Washington, D.C. 20230, and to the Office of Information and Regulatory Affairs, Office of Management and Budget, Paperwork Reduction Project (0625-0217), Washington, D.C. 20503.

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-----FORM ITA 4130P-I (rev. 5/95)  
OMB. No. 0625-0217; Expires 05/31/2002

For additional information regarding market research specific to your products and services, ask about our **Flexible Market Research** and **Customized Market Analysis** programs by contacting us at **1-800-USA-TRAD(E)** or [www.export.gov](http://www.export.gov) or [www.buyusa.com](http://www.buyusa.com). Both reports provide timely, customized, reliable answers to your inquiries about a market and its receptivity to your products and services.

To the best of our knowledge, the information contained in this report is accurate as of the date published. However, **The Department of Commerce** does not take responsibility for actions readers may take based on the information contained herein. Readers should always conduct their own due diligence before entering into business ventures or other commercial arrangements. **The Department of Commerce** can assist companies in these endeavors.

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