

## Moderate Growth Continues Amid Variable 3rd Quarter Results

Even though combined year-to-date production is ahead of last year for the three Japanese-affiliated automakers in Canada, in the third quarter of 2000 production at HCM, Toyota (TMMC) and CAMI, fell 3.6% compared to 1999. At the same time, third quarter sales by JAMA Canada members climbed 7.3% over the previous year.

### Output at HCM reaches full capacity

Combined output of light duty vehicles climbed 5.1% to almost 462,000 units at the end of the third quarter. However, the results differed among companies. Only Honda was up over the previous year, due to the hot-selling Odyssey minivan. Moreover, HCM successfully launched two new models at the same time in September – the 2001 Honda Civic and the world debut of the Acura MDX sport utility vehicle. Capacity at HCM will soon reach annual capacity of 340,000 units.

On the other hand, TMMC and CAMI production results declined 12.7% and 2.0% respectively, over 1999. The drop in output can be attributed to softening markets for models that are older in the product cycle.

TMMC will begin building a new version of the Corolla in the fall of 2001, and CAMI has announced that it will stop production of the sub-compact car (Chevrolet Metro and Suzuki Swift) next spring. Although a new model has not yet been designated, CAMI continues to make the popular compact SUV in Ingersoll (Suzuki Vitara and Chevrolet Tracker).

Elsewhere in the Canadian auto industry, both DaimlerChrysler Canada and General Motors have announced short term layoffs at specified Canadian plants due to high inventories. As most production in Canada is exported to the US, the market in the US is showing some signs of cooling, even though current incentive-induced sales levels are up 5.2% over the first nine months of last year.

### Rosy Outlook for Sales in Canada

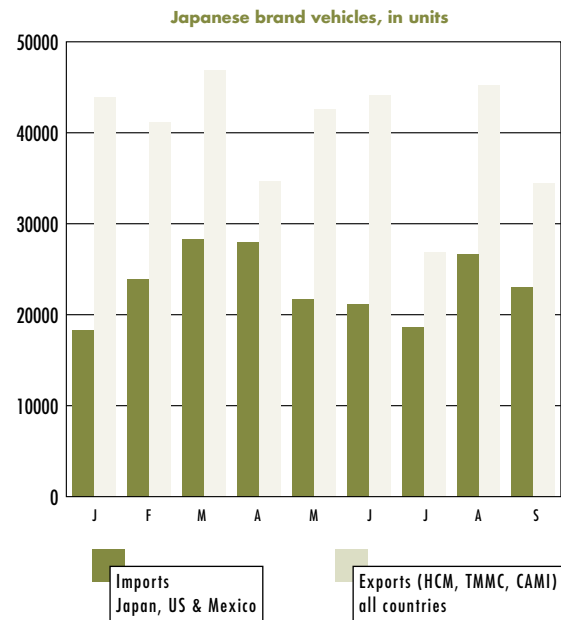
Most analysts are currently bullish on overall auto sales in Canada into 2001 due to strong economic indicators, productivity gains and an aging Canadian vehicle fleet.

For JAMA Canada members as a group, results for the end of the third quarter show light vehicle sales up 8.7% to almost 297,000 units. Car sales rose 10.3%, while light trucks gained 4.1% over the same period in 1999. At this

rate, 2000 year end results will exceed the previous record of 365,000 units set in 1999.

In terms of market share, JAMA Canada members share stands at 24.5%, up half a point from last year. Passenger car share is 33.5%, while light truck share is 13.6% for the first nine months of 2000.

### Monthly 2000 Canada Imports & Exports



See **Rosy Outlook...** continued on page 8

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## Light Vehicle Sales in Canada, by Company

Company	Jan-Sept 2000			Jan-Sept 1999			% Change		
	CARS	TRUCKS	TOTAL	CARS	TRUCKS	TOTAL	CARS	TRUCKS	TOTAL
<b>HONDA</b>	82,646	20,765	103,411	79,088	19,549	98,637	4.5	6.2	4.8
N.A. Built	75,441	10,328	85,769	69,043	8,855	77,898	9.3	16.6	10.1
Japan Built	7,205	10,437	17,642	10,045	10,694	20,739	-28.3	-2.4	-14.9
<b>TOYOTA</b>	76,466	20,779	97,245	70,647	26,055	96,702	8.2	-20.2	0.6
N.A. Built	35,876	12,296	48,172	34,243	14,351	48,594	4.8	-14.3	-0.9
Japan Built	40,590	8,483	49,073	36,404	11,704	48,108	11.5	-27.5	2.0
<b>MAZDA</b>	29,194	11,736	40,930	25,853	6,240	32,093	12.9	88.1	27.5
N.A. Built	2,436	3,672	6,108	3,713	3,848	7,561	-34.4	-4.6	-19.2
Japan Built	26,758	8,064	34,822	22,140	2,392	24,532	20.9	237.1	41.9
<b>NISSAN</b>	22,957	13,103	36,060	15,914	11,730	27,644	44.3	11.7	30.4
N.A. Built *	14,757	4,631	19,388	9,286	3,044	12,330	58.9	52.1	57.2
Japan Built	8,200	8,472	16,672	6,628	8,686	15,314	23.7	-2.5	8.9
<b>SUZUKI</b>	3,939	4,581	8,520	4,063	4,864	8,927	-3.1	-5.8	-4.6
N.A. Built	1,025	1,654	2,679	1,283	1,651	2,934	-20.1	0.2	-8.7
Japan Built	2,914	2,927	5,841	2,780	3,213	5,993	4.8	-8.9	-2.5
<b>SUBARU</b>	7,322	3,433	10,755	6,147	3,042	9,189	19.1	12.9	17.0
N.A. Built	5,491	0	5,491	4,133	0	4,133	32.9	0.0	32.9
Japan Built	1,831	3,433	5,264	2,014	3,042	5,056	-9.1	12.9	4.1
<b>TOTAL</b>	222,524	74,397	296,921	201,712	71,480	273,192	10.3	4.1	8.7
N.A. Built	135,026	32,581	167,607	121,701	31,749	153,450	10.9	2.6	9.2
Japan Built	87,498	41,816	129,314	80,011	39,731	119,742	9.4	5.2	8.0

\* car sales include Mexican built

Source: AIAMC

### Motor Vehicle Production in Canada

	Jan-Sept 2000	Jan-Sept 1999	% Change
<b>HONDA (HCM)</b>	241,620	197,141	22.6
<b>TOYOTA (TMMC)</b>	139,897	160,172	-12.7
<b>CAMI*</b>	80,097	81,773	-2.0
<b>TOTAL</b>	461,614	439,086	5.1

\* 1999 estimated

Source: JAMA Canada

### Motor Vehicle Exports from Canada

	Jan-Sept 2000	Jan-Sept 1999	% Change
<b>HONDA (HCM)</b>	184,603	146,256	26.2
<b>TOYOTA (TMMC)</b>	105,629	126,544	-16.5
<b>CAMI*</b>	69,651	60,000	16.1
<b>TOTAL</b>	359,883	332,800	8.1

\* 1999 estimated

Source: JAMA Canada

### Vehicle Imports (Shipments) to Canada

	Jan-Sept 2000	Jan-Sept 1999	% Change
<b>JAPAN</b>	132,242	126,790	4.3
<b>U.S./MEXICO</b>	78,834	65,069	21.2
<b>TOTAL</b>	211,076	191,859	10.0

Source: JAMA, JAMA Canada

# Expanding Alliances: General Motors Doubles Equity Stake in Suzuki Motors

In mid-September, GM agreed to pay about C\$980 million (US\$653 million) to double its equity ownership of Suzuki Motor Corporation to 20%, continuing the trend toward expanding equity tie-ups among global automakers. Among other things, this move will help GM and Suzuki in their Asian strategies, particularly as a result of Suzuki's strength in small vehicle design and production.

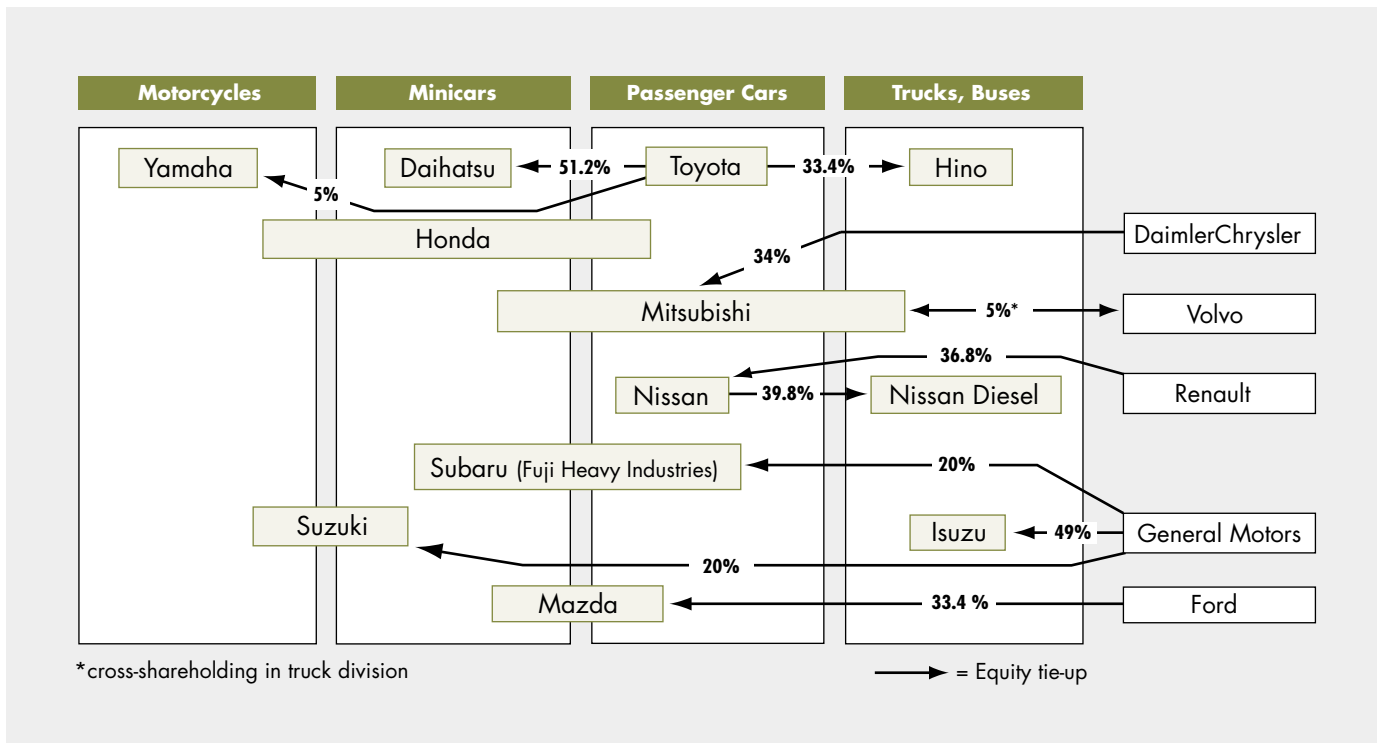
The past two years has been a period of dramatic change for automakers in Japan. In part a reaction to the lingering economic problems in Japan, new or expanded equity relationships with other automakers, both domestic and foreign.

At a time when Japanese industry and government are restructuring to create a sustainable economic recovery,

new business affiliations, including capital tie-ups are important initiatives for long term survival in an increasingly competitive world. These developments are also part and parcel of the continuing internationalization of the auto industry.

Equity alliances are not new to the Japanese auto industry, but the extent of these tie-ups are breaking new ground. Intense global competition in both mature and developing markets, the constant need to reduce cost, as well as the high cost of developing new technologies are compelling factors for vehicle manufacturers to seek ways to rationalize their activities. The chart below summarizes the current status of major equity affiliations among Japanese automakers.

Automakers Equity Affiliations in Japan



## Member Profile

# Honda Canada Inc.

Three quarters of the way through 2000 and it looks like Honda Canada (HCI) will have yet another banner year of production and sales. Last year, production jumped 53% to a new peak of 275,000 units; while sales reached a record 131,000 units. Production capacity at Honda of Canada Manufacturing (HCM) is slated to rise in 2000 to 340,000 units; while year-to-date sales are up almost 6% over 1999.

In fact, markets in Canada and the US have been so strong over the past year or so that associates in Alliston, Ontario have been running hard just to keep up with



*Shigeru Takagi  
President Honda Canada Inc.*

local demand, particularly for the hot-selling Odyssey minivan, according to the current President of HCI, Shigeru Takagi.

Honda's production to sales ratio is typical of the overall auto industry in Canada where over two vehicles were built for every one sold in Canada last year. Currently, Honda exports about 80% of total production in Canada to ten different countries, although the majority are sent to the US. Exports of finished vehicles from HCM surpassed all previous years at over 211,000 units in 1999.

What's more, about 6,280 Odyssey minivans have been exported to markets back in Japan over the past twelve months. This is the first Canadian built vehicle to be sold to Japanese consumers in significant numbers, and is a testament to the high quality of both the Canadian associates who build these vehicles, as well as the 50 or so Canadian auto parts suppliers.

Not only is HCI a net exporter of finished vehicles, currently about 83% of all vehicle sales in Canada are models built in North America.

Honda Canada was established in 1969, and over the past three decades has grown to become the leader in unit vehicle sales in 1999 among JAMA Canada member companies. Total sales exceeded \$9 billion last year. Of that, \$3.5 billion represented domestic sales in Canada, and about 95% comes from the automotive division.

Honda's Canadian operations include the Head Office in Scarborough, HCM in Alliston, Honda Canada Finance,

Honda Trading Canada and four zone offices in British Columbia, Ontario, Quebec and Nova Scotia. Altogether, Honda employs about 4,600 associates across Canada, including 4,000 at the manufacturing plants in Alliston. HCI also maintains a small cold weather test facility based in Halifax.

Honda currently builds four different vehicles on two lines at the manufacturing plant in Alliston - Civic (4 door sedan), Acura 1.7EL, Odyssey minivan and the new sport utility vehicle, Acura MDX.

Like the Civic and 1.7EL, the Odyssey and MDX are built on the same platform and are assembled on the same line. Total output in Plant 1 (Civic & 1.7EL) is set at 170,000 units annually, while Plant 2 (Odyssey & MDX) will reach annual capacity of 170,000 units this year.

## New Manufacturing System

With the launch of the new MDX, HCM is the first plant in North America to build a minivan and an SUV on the same line. And with the recent launch of the new model of the Civic at plants around the world simultaneously, HCM is also the first plant to successfully launch two new vehicles (the 2001 Civic sedan and Acura MDX) at the same time.



*Acura MDX production started in September 2000  
at Honda's plant in Alliston, Ontario*

At the heart of this 'new manufacturing system' is the 'General Welder' (GW) developed by Honda Engineering which enables the line to change from one vehicle type to another as required, by simply reprogramming the robots. In addition, fewer jigs are needed which reduces production costs.

## Honda's Strategic Vision

For the 21st century, Honda has established three directions for meeting customers needs: 'value creation, globalization and eco-solution'.

In essence, Honda aims to remain an independent company with both global scope and local focus, contributing to the well-being of customers and their local communities, with environmentally friendly products designed for safety, high performance and low emissions.

Globally, Honda has established five geographical operations. Each region has the autonomy and decision making responsibility for sales, manufacturing and R&D to develop products for the needs of local customers.

Today, Honda sells more than 10 million products annually in operations around the world including over 4 million power products like all terrain vehicles (ATV), outboard engines, generators, lawn & gardening equipment and snowblowers. Honda is also well known among racing enthusiasts. The year 2000 marks the beginning of Honda's third era of Formula One Grand Prix Racing.

## Environmental Commitment

Honda has always been known for its engines. It was the introduction of the revolutionary CVCC (compound vortex-controlled combustion) engine in the 1973 Civic in North America during the first oil-crisis, that Honda became a force to be reckoned with in the automobile industry.

More recently, Honda has developed several generations of light, fuel-efficient, low emission VTEC (variable valve timing and lift electronic control) engines. Honda continues to demonstrate its commitment to eco-friendly products and practices in a variety of ways:

- Every major manufacturing plant, including HCM, has met ISO 14001 environmental standards for waste disposal, water treatment and energy use.
- HCM recycles 98% of its waste, and in recognition received the 'Outstanding Business of 1998' award from the Recycling Council of Ontario for its comprehensive waste reduction and recycling programs.
- Honda Canada introduced the Insight earlier this year, a two-seat car with a 1 litre gas-electric hybrid engine. The Insight is an urban commuter vehicle that demonstrates both high fuel efficiency (up to 3.2 litres/100 km) and low exhaust emissions (ULEV rating in the US).



*Honda Insight – gas/electric hybrid vehicle*

- Honda is expected to include a gas-electric hybrid engine in a Civic model as early as next year.
- Honda has also announced plans to introduce a fuel cell vehicle by 2003.

## In Support of Family Literacy in Canada

Honda Canada, like other Honda companies around the world, have always maintained a core philosophy based on the principle 'respect for the individual'. This has been the focus of its corporate activities, ever since Soichiro Honda established his motorcycle manufacturing company in 1948.

Two years ago, HCI decided to support family literacy in Canada through a partnership with ABC Canada, whose activities in local communities across the country are consistent with Honda's 'respect for the individual' philosophy.

With the support of Honda and its Canadian dealer network, January 27 of each year is now designated 'Family Literacy Day', which includes hundreds of activities in all provinces with the help of grassroots volunteers.

Since 1998, every Odyssey sold in Canada included a Space Odyssey Travel Kit designed to promote reading and literacy for children, and Honda dealers donated \$20 to ABC for each sale.

In recognition of this effort, Maureen Cavan, Chair of ABC Canada said, "ABC is thrilled that Honda continues to champion family literacy in Canada. This kind of commitment from the private sector is essential to improving economic opportunities and the intellectual lives of Canadian families."

## Highlights of the Harbour Report 2000

The 2000 Harbour Report, an annual plant-by-plant comparative and competitive analysis of automotive manufacturing in North America, was released in June. While the analysis covers many areas of auto manufacturing, one of the key findings is labour productivity within each participating plant. The primary measure of labour productivity is 'hours per vehicle' (HPV). There are numerous factors that affect HPV; for example, product design, capacity utilization, automation, the number of welds, modularization, option variations, and model mix to name a few.

Results showed that Japanese-affiliated vehicle makers in Canada and the US continue to lead in terms of productivity and operating efficiency. Among the highlights:

- Nissan Smyrna (Tennessee) rebounded from low volume in 1998 with new products that contributed to a 2.6% labour productivity gain. Nissan remains the No.1 manufacturer in overall labour productivity at 18.70 HPV.
- Honda (US) recorded a 5.4% labour productivity improvement coming off the launch of the Acura TL.

- CAMI, in Ingersoll Ontario, increased volume 107% over 1998 and improved labour productivity by 33% in 1999 – the most improved of any manufacturer.
- Toyota Cambridge North, which makes the 4 door Corolla, leads in the subcompact segment with 17.56 HPV.
- Toyota Cambridge South (Solara) had a 62.5% improvement coming out of launch.
- NUMMI (Toyota-GM plant in Fremont, California) passenger car gained 4.9% in labour productivity.
- Mitsubishi's manufacturing plant (Normal, Illinois) registered a 17.6% gain in productivity due to a major restructuring in 1999.

*(Note: Not all plants participated in the survey. Honda Canada Manufacturing in Alliston was not included.)*

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## Canada Accepts WTO Deadline for Ending the Auto Pact

After the WTO released the Arbitrator's Report on October 4, the Canadian government indicated that it would accept the timetable set by the WTO to bring the existing Auto Pact, contained in the Motor Vehicles Tariff Order (MVTO 1998) and various Special Remission Orders (SRO), into line with international trade rules by February 19, 2001.

Although Canada complied with the 90 day ruling of the WTO panel report regarding the 'export subsidy' by removing the production-to-sales ratio on September 17, this change did not eliminate the key matter of discriminatory treatment, nor did it end the duty-free subsidy.

As a result, further discussions led the WTO to appoint an Arbitrator to rule on a timetable for Canada's full compliance with the findings and recommendations of the Final Report that was adopted by the Dispute Settlement Body of the WTO on June 19th.

While Canada requested a period of almost 11 months for full compliance, the 8 months granted by the Arbitrator's

report is considerably more than the 90 day period sought by the EU and Japan.

When Canada has fully complied with the WTO ruling on the Auto Pact early in 2001, the regulatory and policy changes will establish equal treatment and open competition for all automakers in Canada.

At the same time, JAMA Canada would urge the Canadian Government to not just end the discriminatory treatment in the Auto Pact, but to make a commitment to remove the current 6.1% Most Favoured Nation (MFN) tariff on all imported finished vehicles as soon as possible.

As it stands, Canada's 6.1% MFN tariff is higher than either Japan at 0% or the US at 2.5%. While the vast majority of vehicles sold in Canada are already duty free under NAFTA, and recognizing that over 80% of all Canadian production is exported, the remaining MFN tariff is an unnecessary tax burden on both automakers and consumers in Canada.

## Supplier Snapshot

### KTH Shelburne Mfg. Inc.

As a major supplier of automotive frame components, KTH Shelburne Manufacturing (KSM) has recently expanded their operations to meet the rapid growth of their main customer, Honda of Canada Manufacturing (HCM) in Alliston, Ontario. Frame components, when assembled by the automaker, form the chassis, and as such serve critical safety and driving stability functions on a vehicle.



*KTH Shelburne Manufacturing plant supplies steel frame components for the Honda Odyssey and Acura MDX*

When KSM began mass production in July 1998, with 80 associates making frame components for the new Honda Odyssey minivan, output was 300 units per day. After expanding both the welding and stamping departments, output is now at 650 units per day, as KSM is now supplying frame components for the Odyssey and the new Acura MDX, both of which are made on the same line at HCM.

In 1999, KSM acquired a new 2500 tonne transfer press for the stamping operation, and has among its equipment 99 robots, 7 MiG welders and 33 stationary welders. Since start-up, the plant has grown to 1.6 times its original size. What's more, KSM attributes its continuous improvement, growth and success to its current 240 full-time associates.

The third company of the KTH Group in North America, KSM was established in 1996 with an initial capitalization of \$27 million. KSM is jointly owned by KTH Parts Industries Inc., Ohio (75%); Hirata Technical Co. Ltd. and Hongo Co. Ltd., Japan (12.5% each).

## Ube Automotive Breaks Ground in Sarnia

In a groundbreaking ceremony on August 22, Ube Industries, Inc. of Yamaguchi Prefecture, Japan kicked off construction of a new aluminum wheel plant in Sarnia Ontario.

With the Mayor of Sarnia, Mike Bradley, Ontario Minister of Economic Development & Trade Al Palladini and Federal M.P. Roger Galloway, the Senior Managing Director of Ube Industries, Inc., Toshiro Kawaguchi announced that the plant is expected to start wheel production in mid-2002, with an annual capacity of 6 million pieces. There will be 250 employees to start, rising to 450 when fully operational. Ube's Sarnia plant will initially be making wheels for GM and DaimlerChrysler.

While this is their first plant in Canada, in 1989, Ube opened an aluminum wheel plant in Mason, Ohio, called A-Mold Corporation, Ube Automotive will be bringing their unique aluminum wheel production technology to the Sarnia operation.

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## Toyoda Gosei Plans Plastic Parts Plant in Ontario

TG Minto Corporation, a wholly owned subsidiary of TG Holdings Inc., has recently broken ground on their new plant in Minto, Ontario.

When it starts production at the end of 2001, TG Minto will be making plastic interior and exterior parts, including instrument panels and console boxes, primarily for the new Toyota Corolla which will be launched next year for the 2002 model year.

The new 150,000 square foot plant, now under construction, will be set on 29 acres in the former town of Palmerston, recently amalgamated and renamed Minto. With a capital investment of \$20 million (Cdn), TG Minto will have 40 employees at start-up, rising to about 70 team members when fully operational in 2003.

This is Toyoda Gosei's fourth plant in Canada, and the first one making plastic auto parts. The other three plants are part of Waterville TG Ltd., two of which are in Quebec, and all of which make weatherstripping for the automotive industry in North America.

## Commentary

# How Foreign Car Sales Regain Their Luster in Japan's Auto Market Recovery



By William C. Duncan, Ph.D. General Director, JAMA U.S.A.

Ever since Model T trucks rumbled into Japan following the devastating 1923 Tokyo earthquake, imports have had a role in Japan's auto culture. Although not significant in numbers until the 1990s, imported cars, particularly Mercedes, BMWs, Volvos and other sporty European cars, have set a bright tone in design and performance.

As the large car market grew in the 1990s, so too did imports. Import sales of only 50,000 units in 1985 reached about 400,000 by 1996. Import market share reached nearly 9 percent of the overall car market and more than 30 percent of the large car market.

All this began to tarnish as the severest recession in post-war history began taking its toll. Imports fell 32 percent following a record 1996 year and have yet to recover in what is at best a slow-growth vehicle market. Overall imports are down 2 percent in the first half of this year.

Although not evident in the numbers, the outlook for foreign sales in Japan's market is bright. Here is how the luster returns:

Imports still hold about 30 percent of Japan's large car market. In the first half of this year, the large car market grew at 15 percent. Although large car imports reported modest growth so far this year, they bounced back last year at a sharp 19 percent rate in a declining market. What pulled overall imports into negative territory this year was not large car performance but poor performance in a weakening small car sector.

The recent globalization within Japan's auto industry creates new opportunities for imports as overseas auto companies develop sales networks through their new Japanese alliances. Examples are Renault's alliance with Nissan, DaimlerChrysler's alliance with Mitsubishi and Fuji's alliance with GM.

Overseas auto companies, for example Ford, now see Japan as a base for developing business throughout the Asian region. These decisions are leading to further development of their Japanese market position including building and selling foreign brand cars in Japan.

Conversely, these alliances are resulting in joint projects outside Japan designed to reduce costs through economies of scale. These ventures will facilitate reverse imports particularly in specialty markets. All this will improve positioning in the small car market as well.

## Motor Vehicle Industry in Japan

Passenger Cars, Trucks, Buses		TOTAL
PRODUCTION <sup>1</sup>	Jan-Sept '00	7,607,283
	Jan-Sept '99	7,404,043
	% change	2.7
EXPORTS <sup>2</sup>	Jan-Sept '00	3,357,578
	Jan-Sept '99	3,278,229
	% change	2.4
SALES/ REGISTRATIONS <sup>3</sup>	Jan-Sept '00	4,550,275
	Jan-Sept '99	4,491,113
	% change	1.3
IMPORT VEHICLE SALES <sup>*4</sup>	Jan-Sept '00	207,357
	Jan-Sept '99	210,457
	% change	-1.5

\* (including models built by Japanese automakers overseas) source: 1,2-JAMA; 3-JADA, JMVA; 4-JAIA

For further information and updated monthly statistics, visit JAMA's website at [www.jama.or.jp/e\\_press/index.html](http://www.jama.or.jp/e_press/index.html).

## The Future

Foreign brands will recover in Japan's auto market due to forces from both the old economy and the new. As the luxury car market recovers so too will imports. As foreign companies establish their investment base in Japan, foreign brands, both imports and domestically built, will enter and compete effectively in the small car market. Globalization and the competition it has sparked are changing Japan in dramatically new ways. Herein lies the excitement of Japan's auto market as it emerges from recession.

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## Rosy Outlook...continued from page 1

Among individual member companies, for the first three quarters of 2000, Honda Canada has the highest sales at 103,000 units, while Nissan Canada leads in terms of year over year growth, up 30.4% to 36,000 units.

## Vehicle Shipments: Exports & Imports

Exports from Canadian plants (HCM, TMMC and CAMI) increased by 8.1% through the end of September to just under 360,000 units combined.

Most exports are sent to the US, although about 2,600 Odyssey minivans have been shipped to Japan for the year to date.

As a result of strong domestic demand, there have been more finished vehicles shipped in 2000 from Japan, the US and Mexico for consumers in Canada. Vehicle shipments from Japan were up 4.3% to 132,000 units, while imports from the US and Mexico rose 21.2% to 78,800 units during the same period. Exports continue to exceed imports by a wide margin.

For further information, questions or comments contact:

JAMA Canada, Suite 460, 151 Bloor Street West, Toronto, Ontario M5S 1S4

Tel: (416) 968-0150

Fax: (416) 968-7095

E mail: [jama@jama.ca](mailto:jama@jama.ca)

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