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Industry, Science and  
Technology Canada

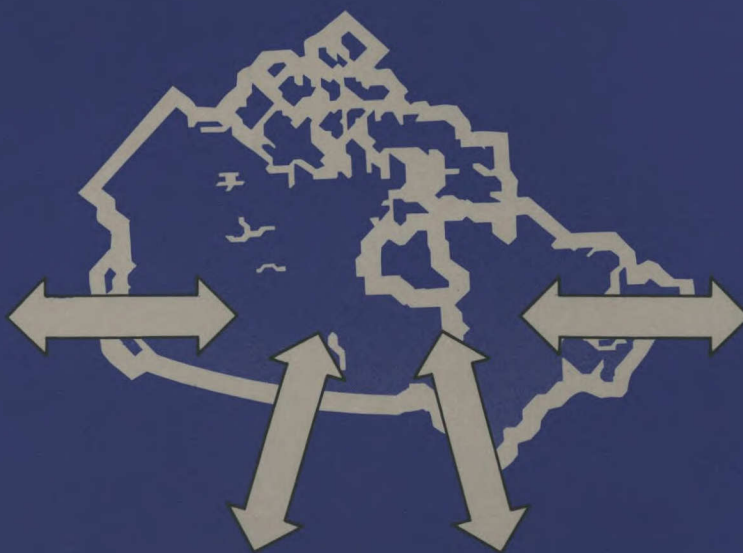
Industrie, Sciences et  
Technologie Canada

# MARKET INTELLIGENCE

## FISH MEAL

Pub. No.: 91069-IP

October 1991



Canada



ID. 91-0466

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## REFERENCE SOURCES

Industry, Science and Technology Canada  
Statistics Canada, Tel.: (613) 951-9647  
Revenue Canada, Tel.: (613) 954-7017  
U.S. Department of Commerce,  
Bureau of the Census,  
Tel.: (301) 763-7754

## TARIFFS

Enquiries concerning **Canadian** tariffs should be directed to the nearest Customs and Excise office or to:

Tariff Programs  
Revenue Canada  
Customs and Excise  
Ottawa, Ontario K1A 0L5  
Tel.: (613) 954-7017  
Fax.: (613) 954-2509

Enquiries concerning tariffs and other government trade regulations in **foreign** countries should be directed to:

Info Export  
External Affairs  
Ottawa, Ontario  
K1A 0G2  
Tel.: (613) 993-6435 OR  
1-800-267-8376  
Fax.: (613) 996-9709

## EXPLANATORY NOTES

### Commodity Classification

Canadian Trade statistics are classified and published according to the International Convention on the Harmonized Commodity and Description Coding System (H.S.), as defined by the Canadian Customs Tariff and Statistical Nomenclature.

### Valuation

Dollar values shown in this report are based on selling price F.O.B. plant, in Canadian dollars. This selling price represents the value paid by the importer, excluding all freight, packing and insurance costs when specified. All trade discounts, when applicable, are also deducted from the selling price.

### Rounding

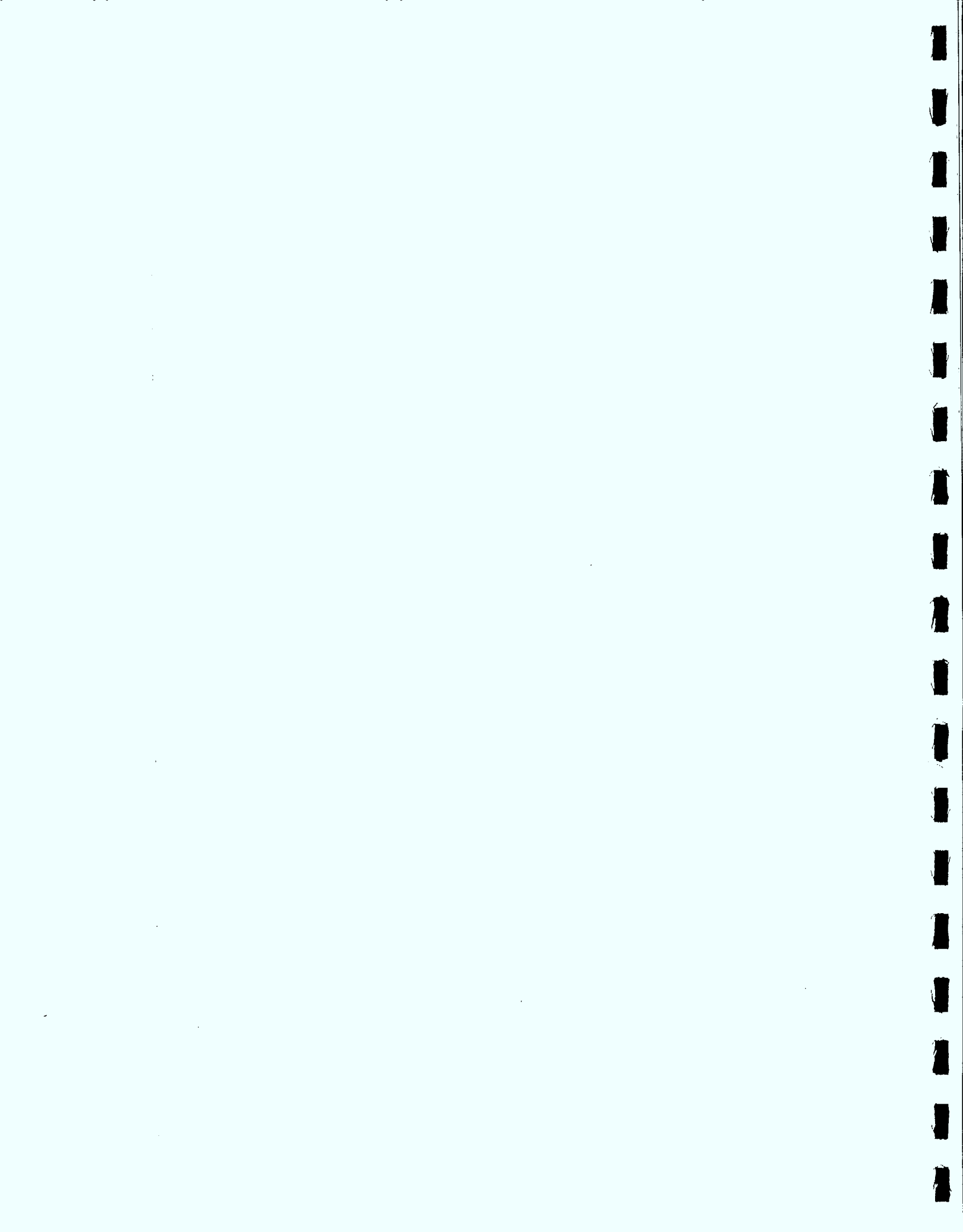
Figures may not add due to rounding.

### Canada - U.S. Exchange Rate

The Bank of Canada exchange rates were used to convert U.S. imports reported in \$US to \$Cdn.

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## FISH MEAL

### I. INTRODUCTION AND SCOPE

This is one of a continuing series of market intelligence reports designed to increase business awareness of the potential existing for production in Canada and to assist businesses and other organizations in their market research of specific products. The detailed information provided in these reports supports studies by organizations seeking to expand existing production lines, change individual product characteristics or engage in new manufacturing investment in Canada. The coverage of a market intelligence report is developed in close consultation with the client, and is tailored to meet their specific requirements. It is important to emphasize that this report does not attempt any assessment as to the feasibility of competing in a particular market.

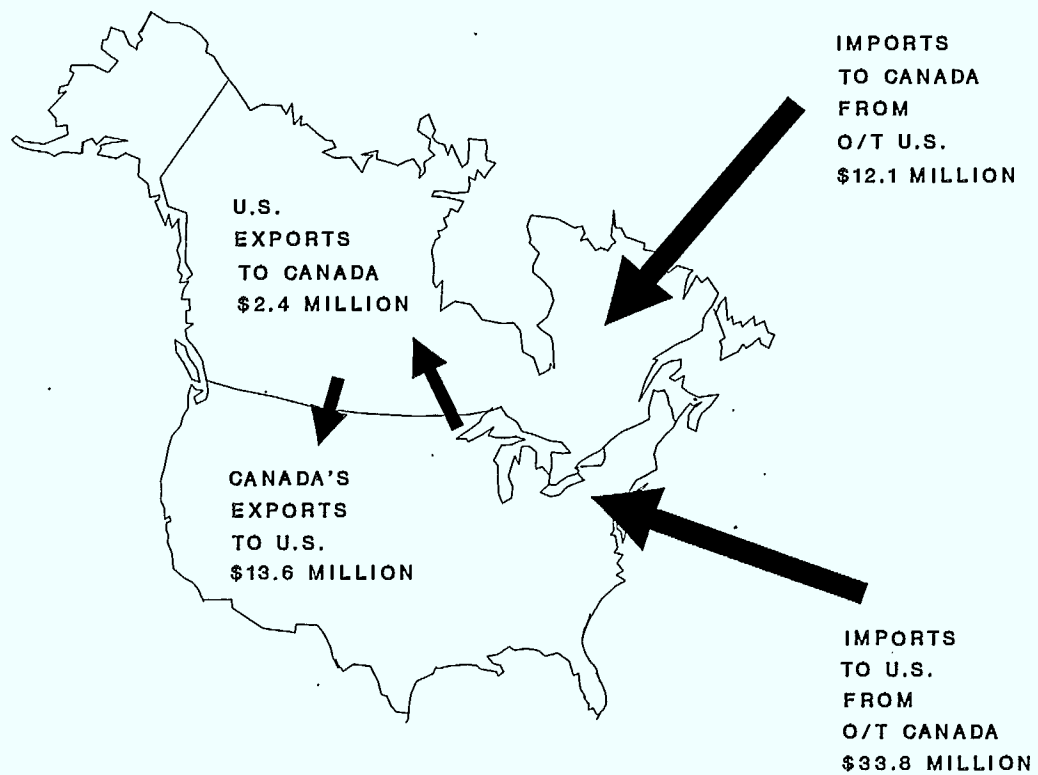
This report is based on data from several sources for the following Harmonized System (H.S.) commodity codes:

<u>Description</u>	<u>H.S. Commodity Codes Analyzed</u>
-Flours, meals and pellets, of fish or of crustaceans, molluscs or other aquatic invertebrates (2301.20)	
---Fish meal	
-----Herring or pilchard	2301.20.10.10
-----Other	2301.20.10.90

## FISH MEAL

(H.S. 2301.20)

### II. NORTH AMERICAN IMPORTS - 1990



North American Imports - \$45.9 Million\*

\* Excludes Canada - U.S. bilateral trade; Mexico.

## FISH MEAL

### III. SUMMARY OF CANADIAN IMPORTS

<u>Description and Commodity Code</u>	<u>1989</u>		<u>Total Imports 1990</u>		<u>Major Country of Export to Canada % of Total Value</u>	
	<u>Quantity</u> (000 kg)	<u>Value</u> (\$000)	<u>Quantity</u> (000 kg)	<u>Value</u> (\$000)	<u>1989</u>	<u>1990</u>
Fish meal:						
Herring or pilchard					USA	USA
H.S. 2301.20.10.10	1 205	978	391	197	37	100
Other					Chile	Chile
H.S. 2301.20.10.90	16 111	12 045	26 635	14 314	81	84

### IMPORTS BY PROVINCE OF CUSTOMS CLEARANCE

#### HERRING OR PILCHARD FISH MEAL (H.S. 2301.20.10.10)

<u>Province of Clearance</u>	<u>1989</u>	<u>1990</u>	<u>Average Annual Growth Rate 1989-90 (%)</u>
British Columbia			
Quantity (000 KGM)	842	275	-67.4
Value (\$)	760 300	134 567	-82.3
New Brunswick			
Quantity (000 KGM)	363	116	-68.0
Value (\$)	<u>218 089</u>	<u>62 665</u>	<u>-71.3</u>
Total <sup>(1)</sup>			
Quantity (000 KGM)	1 205	391	-67.6
Value (\$)	978 389	197 232	-79.8

Ranked in descending order by 1990 value.

<sup>(1)</sup> Includes Yukon and Northwest Territories.



## FISH MEAL

### III. SUMMARY OF CANADIAN IMPORTS (Cont'd)

#### IMPORTS BY PROVINCE OF CUSTOMS CLEARANCE

#### OTHER FISH MEAL (H.S. 2301.20.10.90)

<u>Province of Clearance</u>	<u>1989</u>	<u>1990</u>	<u>Average Annual Growth Rate 1989-90 (%)</u>
British Columbia			
Quantity (000 KGM)	13 676	22 890	67.4
Value (\$000)	10 510	12 480	18.7
Québec			
Quantity (000 KGM)	1 27	1 398	9.3
Value (\$000)	862	616	-28.5
New Brunswick			
Quantity (000 KGM)	-	1 204	0.0
Value (\$000)	-	578	0.0
Manitoba			
Quantity (000 KGM)	723	556	-23.2
Value (\$000)	424	326	-23.0
Ontario			
Quantity (000 KGM)	3	337	13 096.6
Value (\$000)	2	176	7 153.9
Alberta			
Quantity (000 KGM)	431	250	-41.9
Value (\$000)	<u>247</u>	<u>137</u>	<u>-44.4</u>
Total <sup>(1)</sup>			
Quantity (000 KGM)	16 111	26 635	65.3
Value (\$000)	12 045	14 314	18.8

Ranked in descending order by 1990 value.

<sup>(1)</sup> Includes Yukon and Northwest Territories.

## FISH MEAL

### IV. CANADIAN IMPORTS BY MAJOR COUNTRIES OF ORIGIN

#### HERRING OR PILCHARD (H.S. 2301.20.10.10)

<u>Country of Origin</u>	<u>1989</u>	<u>1990</u>	<u>Average Annual Growth Rate 1989-90 (%)</u>
United States			
Quantity (000 KGM)	538	391	-27.3
Value (\$)	357 882	197 232	-44.9
Other			
Quantity (000 KGM)	667	-	0.0
Value (\$)	<u>620 507</u>	<u>-</u>	<u>0.0</u>
Total			
Quantity (000 KGM)	1 205	391	-67.6
Value (\$)	978 389	97 232	-79.8

#### OTHER FISH MEAL (H.S. 2301.20.10.90)

<u>Country of Origin</u>	<u>1989</u>	<u>1990</u>	<u>Average Annual Growth Rate 1989-90 (%)</u>
Chile			
Quantity (000 KGM)	12 558	22 285	77.5
Value (\$000)	9 697	12 073	24.5
United States			
Quantity (000 KGM)	2 810	4 350	54.8
Value (\$000)	1 732	2 241	29.4
Other			
Quantity (000 KGM)	743	-	0.0
Value (\$000)	<u>616</u>	<u>-</u>	<u>0.0</u>
Total			
Quantity (000 KGM)	16 111	26 635	65.3
Value (\$000)	12 045	14 314	18.8

Ranked in descending order by 1990 value.

## **FISH MEAL**

### **V. CANADIAN PRODUCTION**

Statistics Canada does not provide data on production of fish meal.

Any enquiries and/or comments regarding Canadian production/shipments should be directed to:

Statistics Canada  
Industry Division  
Survey of Manufactures Section  
Ottawa, Ontario  
K1A 0T6  
Tel.: (613) 951-3523

### **VI. CANADIAN EXPORTS**

There are no separate Canadian export data for fish meal.

## FISH MEAL

(H.S. 2301.20)

### VII. CANADIAN IMPORTERS - 1990

There were 17 known importers of fish meal in 1990. The principal five importers accounted for 96 per cent of the total import value.

<u>Principal Importers</u> (No.)	<u>Cumulative Value</u> (\$000)	<u>Cumulative % of Total Value</u>
5	13 996	96
10	14 431	99
All Importers (17)	14 511	100

Importers of fish meal during 1990 are listed below in alphabetical order. Where the importer is not the same as the consignee (i.e. the recipient of the goods shipped), the name of the consignee rather than that of the importer is listed. The importer or consignee is not necessarily the end-user of the product.

NOTE: This list includes all importers except individuals.

<u>Name</u>	<u>Address</u>	<u>Name</u>	<u>Address</u>
C B Constantini Ltd.	Vancouver, B.C.	P H Friesen Ltd.	Winnipeg, Man.
Canada Packers Inc.	Toronto, Ont.	Parkland Feeds Inc.	Winnipeg, Man.
Connors Brothers Ltd.	Blacks Harbour, N.B.	Ritchie Smith Feeds Inc.	Abbotsford, B.C.
Corey Feed Mill Ltd.	Fredericton, N.B.	Shafer Haggart Ltd.	Vancouver, B.C.
Intertrade Inc.	Hurlock, MD, USA*	Tropic Aquaria Services Inc.	Brampton, Ont.
IPC Trading Co. Inc	Fairfield, NJ, USA*	Wilbur-Ellis Company	
J&R Tropicals Co. Inc.	Brampton, Ont.	of Canada Ltd.	Vancouver, B.C
Manitoba Ltd.	Winnipeg, Man.	Wilbur-Ellis Company	
Moore-Clark Co. (Canada) Inc.	Vancouver, B.C.	of Canada Ltd.	San Francisco, CA,
North Central Trading Company	Eden Prairie, MN, USA*		USA*

\* Non resident importer.

**FISH MEAL**  
**(H.S. 2301.20)**

**VIII. FOREIGN EXPORTERS TO CANADA - 1990**

Major exporters to Canada of fish meal are listed by major country of origin in descending order of dollar value. These exporters accounted for 99 per cent of the total value of Canadian imports during 1990.

<u>Country of Origin</u>	<u>Name of Foreign Exporter</u>	<u>Value of Exports</u> <u>to Canada</u>
		<u>1990</u> (\$000)
Chile	I.P.C Trading Co. Inc.	12 074*
	Wilbur Ellis Co.	
	Pesquero Quintero	
	Intertrade Inc.	
	E. River Farm	
United States	I.P.C Trading Co. Inc.	1 860*
	Wilbur Ellis Co.	
	Intertrade Inc.	
	Zapata Hayne Corp.	275*
	Meedernick Molasses	
	Moore Clark Co.	
	H.J. Baker and Bothers	148*
	Elizabeth River Farm	
	Paul Basil	
	North Central Trading	91*
	Gossett Nutrition	
	Shafer and Haggart	
	International Protein Corp.	
	Holly Farms	
TOTAL		14 448

\* Aggregated to preserve confidentiality of Canadian importers.

## FISH MEAL

### IX. CANADIAN SUPPLIERS

The following list is taken from the Business Opportunities Sourcing System (BOSS), a computerized data bank established by the Federal Department of Industry, Science and Technology Canada. This list may not include all suppliers of the products in question, as companies must themselves register in BOSS. Information on Canadian products supplied is as given by the companies.

#### BOSS

Companies are arranged in alphabetical order.

#### Fish Meal

<u>Name</u>	<u>Address</u>
*Beothic Fish Processors Limited	Badgers Quay, Nfld.
*British Columbia Packers Ltd.	Vancouver, B.C.
Canada Packers Inc. Int'l Trade Div.	Toronto, Ont.
*Earle Proteins Limited	Carbonear, Nfld.
Fish Reduction Limited	Woods Harbour, N.S.
*Fishery Products International Limited	St. John's, Nfld.
*Harbour Grace Fishing Company Limited	Harbour Grace, Nfld.
*Karlsen Shipping Company Limited	Halifax, N.S.
*Kenney & Ross Ltd.	Port Saxon, N.S.
Madelipêche Inc.	Iles-de-la-Madeleine, Qué.
*Murex Aqua Foods Inc.	Langley, B.C.
Pecheries F.N. Fisheries Ltd	Shippagan, N.B.
Prince Rupert Fisherman's Co-op Assoc.	Vancouver, B.C.
Rothsay Div. of Maple Leaf Mills Ltd.	Winnipeg, Man.
*Swimco Canada Inc.	Georgetown, Ont.
W.E. Acres Crabmeal Ltd.	Cap Pele, N.B.
*West Coast Reduction Ltd.	Vancouver, B.C.

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\* Company engaged in export trade.

Any enquiries and/or comments regarding the BOSS list should be directed to:

Business Opportunities Sourcing System  
Industry, Science and Technology Canada  
235 Queen Street  
Ottawa, Ontario K1A 0H5  
Tel.: (613) 954-5031  
Telex: 053-4123  
Fax.: (613) 954-1894

## FISH MEAL

### X. CANADIAN AND FOREIGN TARIFFS

Fish meal included in this report are dutiable under the following Canadian tariff item.

<u>Tariff Item</u>	<u>Description of Goods</u>	<u>Tariff Treatment - 1991</u>		
		<u>Most Favoured Nation Tariff</u>	<u>General Preferential Tariff</u>	<u>United States Tariff</u>
2301.20.10	Fish meal	5%	Free	Free

Fish meal included in this report are dutiable under the following U.S. tariff item:

<u>Tariff Item</u>	<u>Description of Goods</u>	<u>Rates of Duty</u>		
		<u>General</u>	<u>Special</u>	<u>2</u>
2301.20.00	Flours, meals and pellets, of fish or of crustaceans, molluscs or other aquatic invertebrates	Free		Free
	Herring meal; pilchard meal			
	Other			

### TARIFF ARRANGEMENTS AND FOREIGN COUNTRIES OF EXPORT

All exporting countries shown in Section IV qualify for the Most Favoured Nation tariff treatment.

Enquiries concerning tariffs should be directed to the nearest Revenue Canada Customs and Excise office as listed on page two of this report.

### FOREIGN COUNTRIES

Enquiries concerning tariffs and other government trade regulations in foreign countries should be directed to External Affairs as listed on page two of this report.

## FISH MEAL

### XI. UNITED STATES' IMPORTS - 1990

The United States Department of Commerce reports U.S. imports as follows:

#### U.S. IMPORTS BY MAJOR COUNTRY OF ORIGIN

Herring Meal; Pilchard Meal  
(H.S. 2301.20.00.10)

Other Flours; Meal & Pellet, Fish  
(H.S. 2301.20.00.90)

<u>Country of Origin</u>	<u>1990</u>
Chile	
Quantity (KGM)	12 272
Value (\$000)	4 968
Canada	
Quantity (KGM)	5 732
Value (\$000)	4 138
Peru	
Quantity (KGM)	5 500
Value (\$000)	1 840
Mexico	
Quantity (KGM)	425
Value (\$000)	229
Norway	
Quantity (KGM)	45
Value (\$000)	64
Other	
Quantity (KGM)	-
Value (\$000)	-
<b>Total</b>	
Quantity (KGM)	<b>23 974</b>
Value (\$000)	<b>11 239</b>

<u>Country of Origin</u>	<u>1990</u>
Peru	
Quantity (KGM)	58 777
Value (\$000)	20 429
Canada	
Quantity (KGM)	13 320
Value (\$000)	9 506
Chile	
Quantity (KGM)	6 169
Value (\$000)	2 823
Panama	
Quantity (KGM)	9 798
Value (\$000)	2 517
Norway	
Quantity (KGM)	473
Value (\$000)	739
Argentina	
Quantity (KGM)	110
Value (\$000)	77
Netherlands	
Quantity (KGM)	19
Value (\$000)	48
France	
Quantity (KGM)	19
Value (\$000)	48
Taiwan	
Quantity (KGM)	5
Value (\$000)	15
United Kingdom	
Quantity (KGM)	1
Value (\$000)	4
Other	
Quantity (KGM)	-
Value (\$000)	-
<b>Total</b>	
Quantity (KGM)	<b>88 611</b>
Value (\$000)	<b>36 206</b>

Ranked in descending order by 1990 value.  
Canada ranked 2 overall.



## DID YOU KNOW?

Effective May 1, 1991, the Market Intelligence Division of the Services to Business Branch of Industry, Science and Technology Canada became the Office of Primary Interest (OPI) for **dISTCcovery**. This service, developed by the New Brunswick Regional Office, is being implemented on a national basis and is available in most regional offices.

**WHAT IS dISTCcovery?** **dISTCcovery** is a tool for discovering and acquiring new manufacturing opportunities emerging from a worldwide explosion in technological developments, new products and new processes:

**dISTCcovery** introduces you to companies and organizations from around the world who are willing to licence the right to manufacture and sell their product in an agreed market area. The reverse is also possible. A Canadian company can also use **dISTCcovery** to promote their unique product or process for licensing internationally.

**dISTCcovery** provides access to international data bases containing thousands of licensing offers for new products, processes and technology originating from around the world.

For more information on this service, contact the Market Intelligence Division at (613) 954-4970 or the nearest ISTC Regional Office listed at the end of this publication.



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Services to Business Branch  
Industry, Science and Technology Canada  
235 Queen Street  
Ottawa, Ontario  
K1A 0H5  
Tel.: (613) 954-4970  
Fax.: (613) 954-5463

OR Seafood and Marine Products Directorate  
Food Products Branch  
Industry, Science and Technology Canada  
235 Queen Street  
Ottawa, Ontario  
K1A 0H5  
Tel.: (613) 954-2931  
Fax.: (613) 954-1894

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Atlantic Place  
215 Water Street, 5th Floor  
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134 Kent Street, Suite 400  
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Toronto, Ont. M5J 1A4  
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Fax.: (416) 973-8714

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1801 Hollis Street, 5th Floor  
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Fax.: (902) 426-2624

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Assumption Place, 12th Floor  
770 Main Street  
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Moncton, N.-B. E1C 8P9  
Tel.: (506) 857-ISTC  
Fax.: (506) 851-6429

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ISTC  
8th Floor  
330 Portage Avenue  
P.O. Box 981  
Winnipeg, Man.  
R3C 2V2  
Tel.: (204) 983-ISTC  
Fax.: (204) 983-2187

#### SASKATCHEWAN

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401-119 4th Avenue South  
Saskatoon, Sask.  
S7K 5X2  
Tel.: (306) 975-4386  
Fax.: (306) 975-5334

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Scotia Tower  
650 West Georgia St.  
P.O. Box 11610  
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Tel.: (604) 666-0266  
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Fax.: (403) 292-4578

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108 Lambert Street  
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Fax.: (403) 873-6228

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235 Queen Street  
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Fax.: (613) 957-7942

