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WORLD MARKET OPPORTUNITIES

Canada. Dept. of Industry, Trade and Commerce

FISHERIES

FOREWORD

This publication is one of a series of World Market Opportunities booklets produced by the Department of Industry, Trade and Commerce to assist Canadian companies in determining potential export markets. The information presented has been derived from input provided by the department's various industry sector branches, international bureaus and Canadian Trade Commissioners abroad.

Countries represented have been arranged in special groups that encompass particular market areas of geographical regions. An alphabetical listing of all countries can be found at the back of the publication.

The World Market Opportunities series includes: Agriculture and Food Products, Capital Projects, Chemicals, Defence, Electrical

and Electronic Products, Fisheries, Machinery, Resource Industries and Construction, Textiles and Consumer Products, and Transportation Industries.

Further information on the series or on exporting is available from the department's Business Centre in Ottawa. The centre receives calls 24 hours a day and may be contacted free from anywhere in Canada by dialing "0" and asking the operator for Zenith 03200.

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EASTERN EUROPE

BULGARIA

The Market

The bilateral fisheries agreement between Bulgaria and Canada has resulted in co-operative ventures in the harvesting and processing of fish within the Canadian 200-mile coastal zone. Within the

terms of the bilateral agreements it is anticipated that Bulgaria will become a market for Canadian fishery products such as mackerel, hake, capelin and other lower-priced species.

CZECHOSLOVAKIA

The Market

A landlocked country, Czechoslovakia is dependent on imports to satisfy requirements for fish. In 1976, imports of fish and fish preparations totalled 70,000 tons valued at \$57.9 million. Imports from western countries accounted for \$35.6 million of the total.

all fish and fish preparations are imported exclusively by the Foreign Trade Corporation KOOSPOL.

Export Opportunities

In the recent past, the inadequate supply situation has compromised Canadian export performance in this market. Czechoslovakia's appropriate trading organizations are always interested in receiving quotations on frozen herring and mackerel.

Import Policies

As foreign trade in Czechoslovakia is state-controlled, practically

GERMAN DEMOCRATIC REPUBLIC

The Market

The German Democratic Republic has a large deep sea fishing fleet. However, its fishing efforts have been hampered by the widespread introduction of 200-mile fishing limits in its traditional fishing waters. The GDR fish catch dropped to 266,000 tons in 1976 compared with an average of 311,000 tons in the previous two years. Canada's East Coast waters are an important source of

fish for the GDR fleet and its continuing interest in obtaining fish from Canadian waters led to the recent signing of a GDR/Canada fisheries agreement. Canada exported 5,800 cwt of herring to the GDR in 1977 and herring exports will continue in 1978. The market for other products such as cod blocks, may develop within the context of bilateral co-operation.

HUNGARY

The Market

An entirely landlocked country, Hungary has a population of approximately 10 million. Domestic production of fish is 23,000 metric tons, composed of river fish plus pond-raised carp and trout. Consumption of fish and fish products is similar to elsewhere in Europe, but due to low-cost Eastern European sources, Canadian firms have yet to make inroads.

lobster, salmon, etc., are not imported. Where possible, fish products are bought from Eastern European neighbours for soft currency, although some Scandinavian products appear on the market at very low prices.

Export Opportunities

At present the Hungarian market must be regarded as limited. Tinned fish could be sold if prices were very good.

Import Policies

Due to a chronic shortage of hard currency, luxury products like

POLAND

The Market

Poland is an important consumer and exporter of fish and, although operating one of the world's largest distant water fishing fleets, still requires imports of specific species to meet demands. Polish import statistics show:

	Total imports	Imports from Canada
1975	54,514 m. tons	—
1976	63,107 m. tons	9,971 m. tons

Fishmeal has also been sold in recent years.

	Quantity CWT	\$ Value	Type
1975	7,881	149,612	Herring fillets frozen
	46,603	670,590	Herring, whole, dressed pickled
1976	15,374	213,684	Herring frozen, whole or dressed
	77,832	717,862	Herring, whole, dressed pickled n.e.s.
1977	165,794	1,098,052	Herring, fresh, whole or dressed
	51,745	615,084	Herring whole, dressed pickled n.e.s.
Jan./April 1978	5,744	429,374	Herring whole, dressed pickled

Poland — (cont'd)

Import Policies

The widespread introduction of 200-mile fishing limits has hampered Poland's fishing efforts. The government is also hoping to increase local fish consumption from 6.4 kg per capita to 9.9 kilos in 1980.

Export Opportunities

Herring is one of the most popular fish species in Poland and the Polish fleet has not been able to fulfill demand. Poland has for

several years imported herring from Canada. Poland may increase its herring purchases from Canada and 37,000 to 50,000 tons of herring could be sold provided suitable terms could be negotiated.

There are also prospects for spot sales of fish meal. Prospects for sales of other pelagic and groundfish species may also develop.

ROMANIA

The Market

Co-operation arising from the bilateral fisheries agreement may result in export sales to Romania.

UNION OF SOVIET SOCIALIST REPUBLICS

The Market

The U.S.S.R. is a major fish producer and competes in many markets throughout the world. Despite several efforts over the past couple of years, Canadian firms have had no success in making sales. However, as many nations have adopted the 200-mile restricted fishing limit, Soviet sources of supply are believed to be diminishing and demand for certain species of food fish could increase. The U.S.S.R. imports limited quantities of canned herring and fresh salted fish from Iceland. In July 1978, a Canadian Fisheries Mission was cautioned that hard currency limitations render imports from Canada "complicated". However, a barter offer covering supplies of Canadian herring, cod fillets, hake, capelin, squid, and mackerel could be of interest.

Import Policies

The U.S.S.R. is a state trading country and all purchases are made through a state monopoly foreign trade organization. The U.S.S.R. has traditionally been a net exporter of fishery products. Offshore requirements as needed are normally purchased from regular clients.

Export Opportunities

Canadian suppliers should contact the Commercial Division of the Canadian Embassy in Moscow providing details of offerings. The Embassy will contact the foreign trade organization regarding possible interest. Alternatively, suppliers may contact V/O Prodintorg, 32/34 Smolenskaya-Sennaya Pl, Moscow 121200, direct, but should provide the Embassy with an information copy for follow-up purposes.

YUGOSLAVIA

The Market

Yugoslavia has a long coastline and a substantial fishing fleet. The country is a net exporter of fish products, mainly due to the very low domestic per capita consumption. There are, however, some imports of frozen fish for local processing, and luxury fish products primarily for the tourist trade.

Import Policies

Imports of most fish products are subject to an annual quantitative

quota (the RK regime) which in addition to customs duties of 20 per cent and an import surcharge of approximately 16 per cent, also calls for counter trade on a one-to-one basis.

Export Opportunities

There would not appear to be much in the way of current opportunities for Canadian exporters other than luxury canned goods destined for the tourist trade.

WESTERN EUROPE (EEC)

BELGIUM-LUXEMBOURG

The Market

Belgium has to rely on imports of a wide variety of fish products to meet its requirements. In 1977 total imports of fish were approximately \$200 million. Canada has managed to secure a fair share of the market, particularly for traditional export items such as frozen and canned salmon, frozen herring, live lobster and crabmeat. Canadian exports of these items in 1977 were valued at \$16.5 million.

Import Policies

There are no specific import policies or restrictions which influence imports of fish products. This trade is largely governed by the world supply and demand situation.

Export Opportunities

Fish products which so far have offered the greatest opportunities for Canadian exporters are frozen and canned salmon, frozen herring, live lobster and crabmeat. Major Canadian suppliers have taken advantage of this situation and are well established in the Belgian market. There is also a developing market for other species such as freshwater perch, ocean perch, frozen herring fillets, perch fillets and frozen cod. Canadian exporters should try to take advantage of these export opportunities, depending, of course, on the supply situation.

BRITAIN

The Market

In 1977 Britain imported more than 200,000 metric tons of fresh, frozen and preserved fish products, to a value of nearly \$400 million. Supplies are imported from many areas, in particular Scandinavia, Japan, EEC countries, the Soviet Union and North America, and the Canadian share of the 1977 total amounted to 10,650 tons valued at nearly \$40 million. A high proportion of the imports from Europe consists of fresh fish landed at British ports by the fishing vessels of various nationalities.

The largest single item imported from Canada is canned salmon and in 1977 Canada regained the position of leading supplier, as shown in the following table:

Canned Salmon Sales to Britain		
From	Metric Tons	\$'000
Canada	5,876	27,970
United States	2,971	12,390
Japan	3,014	11,980
U.S.S.R.	2,143	9,688
Other countries	58	197
	<hr/>	<hr/>
	14,062	62,225
	<hr/>	<hr/>

Import Policies

The restrictions on catches of herring in the North Sea and west of Scotland, as well as the limitations on the operations of British vessels in Icelandic and Norwegian waters, should offer opportunities for Canadian exporters of a range of fishery products.

Export Opportunities

Frozen shellfish — the demand, particularly for shrimps, still continues to come from the luxury trade. Frozen herring — the British shortage is likely to last for some years and should offer continuing opportunities for Canadian exporters of both whole fish and fillets.

DENMARK

The Market

Total landings in Danish ports in 1977 were valued at \$416 million. Imports of fish and fish products were \$229 million, and exports reached \$790 million. Per capita fish consumption was estimated at 21.5 kilograms.

Export Opportunities

There continues to be a good market for frozen salmon, with Canadian exports of \$3.9 million in 1977. Market is good for fresh, frozen or canned lobster, canned crabmeat and frozen scallops. There is a good potential market for frozen herring with sales depending naturally on conditions of price and quality.

FRANCE

The Market

France will offer growing potential for fisheries products, particularly Atlantic species and shellfish due to reduced European supplies and the fishing limits imposed on the French fleet following extension of fisheries jurisdiction to 200 miles by coastal states and unilateral action by Britain to restrict fishing in traditionally British waters to its own fleet.

Canada should continue to supply 35 to 40 per cent of French requirements of frozen salmon, providing catch permits. Require-

ments for freshwater species should continue to grow but at a relatively slower pace. France has traditionally been and will continue to be a strong market for lower priced and luxury white flesh species.

Import Policies

French government policy appears to be directed at facilitating imports of fisheries products through lower tariff rates, particularly for raw unprocessed products. As dependency on foreign supplies

France — Import Policies (cont'd)

increases, it is expected that ease of entry will extend to semi or partly processed items.

Export Opportunities

Considerable opportunities will develop in the long term for increased shipments of frozen cod, herring, salmon and other fish species. Introduction of previously unexploited species will be much more difficult but should not be discounted. Constant demand has developed for skate wings, swordfish and monk fish tails with increasing quantities being shipped from Canada.

Demand for canned salmon is expected to be strong in 1978, however Canada has slipped badly as a supplier to the French market with the U.S.S.R. accounting for over 80 per cent of imports in 1976 due to a reported superior price/quality ratio and stronger brand identification. However, this share slipped to about 60 per cent in 1977, and a definite opportunity appears to exist in this sector.

The canned crab market should favour Canadian production as consumer's preference is moving away from products of Japan and Thailand and Russian crab meat has become more expensive.

GERMANY, FEDERAL REPUBLIC OF

The Market

The estimated total requirement of the domestic market for seafood products is some 600,000 metric tons, of which about half has been accounted for by the catch of the West German fishing fleet.

The extension of economic fishing zones in 1977 and the subsequent reduced quotas will severely curtail activities of the West German fleet and lead to further reliance on imports to meet domestic requirements. This situation is expected to continue for about three years while fish stocks, particularly in EEC waters, are being replenished.

Prices of fish rose substantially in 1977 and the strong pressure on prices, in view of a tight supply position, is expected to persist. Fish prices in the past have been low relative to meat prices so that the market has adjusted to these higher price levels with little consumer reaction. There is concern, however, that increases anticipated in the months ahead may well meet with consumer resistance. In order to maintain a reasonable level of supplies, the West German industry is showing considerable interest in species

new to the market. The West German Government is providing considerable support and encouragement to the industry in developing sources for other than traditional fish items to assist in utilizing the excess capacity of the fleet and the processing industry.

Canadian exports of fisheries products, mainly herring and salmon, have been rising steadily in recent years, totalling \$48 million in 1977. Further gains may be expected in the years ahead, especially for herring products.

The Canadian share of the West German import market is about 8 per cent with further room for expansion. Import demand for saltwater fish such as halibut, sole, and cod as well as for species such as salmon and eels is expected to increase substantially. Lobsters, live and frozen as well as canned are enjoying increased popularity with a strong demand for imports. Canadian exporters can therefore look forward to West Germany as a promising market at favourable prices for most fish species in the years ahead.

IRELAND

The Market

Irish fish imports are slight due to the country's small population (3.1 million), low per capita consumption (approximately 12 lb. per annum) and the availability of many species from domestic sources. The Irish fishing industry landed about 80,000 metric tonnes in 1977, and generated an income of about £50 million, i.e., one per cent of GNP. There has been a modest annual increase in recent years due to increased processing for export.

Ireland is concerned about the serious depletion of fish stocks and the fact that Irish fishermen are not equipped to compete with the large-scale operations of other countries. In terms of long-range planning, the government has concluded that the fishing industry must operate on a larger scale to avoid losing out quickly to foreign competition. The Irish Fisheries Board is now committed to a development plan that will encourage the construction of larger trawlers for deep water fishing. In addition, attempts are being made to develop a fish processing industry and thus augment the value added to the catch.

In 1976 landings of pelagic varieties such as herring and mackerel were down, whereas landings of most demersal varieties had increased slightly. Total landings for the year were approximately 74,000 metric tons.

The industry's contribution to the gross national product was about £35M, i.e., approximately 0.9 per cent. This reflects a modest increase over previous years due to increased processing for export.

Export Opportunities

Consumers generally prefer fresh fish. Growing use is being made of frozen fresh products, a sector which is, in effect, controlled by three Irish processor/distributors. Canned salmon has been growing in popularity due to its relatively stable price in comparison with competing foods.

ITALY

The Market

Italy consumes roughly 450,000 tonnes of fresh and frozen fish and 100,000 tonnes of preserved and canned fish annually. Of these totals, some 190,000 tonnes and 60,000 tonnes, respec-

tively, are imported. Imports consist mostly of Mediterranean-type species prized by the Italian consumer, but there is also a substantial market for groundfish, especially codfish. Canadian exports to Italy in 1977 totalled \$5.4 million, consisting almost

Italy — The Market (cont'd)

exclusively of frozen salmon (\$2.7 million), canned salmon (\$1.0 million) and salt cod (\$1.7 million).

Import Policies

There are no quotas or quantitative restrictions on fish imports, and duty rates range from nil in the case of products such as fresh or frozen tuna, herring and sprat, up to 24 to 25 per cent in the case of canned tuna and sardines. All fish products must be accompanied

by certificates of health and origin, a mercury certificate and a radioactivity certificate (if fished in Pacific waters).

Export Opportunities

Importers are continually on the lookout for new supply sources for tuna, squid, cod, hake and mackerel. The market for Canadian cod and salmon, as well as other species, will continue to grow, especially to the extent that the Canadian product can be geared toward the needs of the Italian market.

THE NETHERLANDS

The Market

The Netherlands is a major salt water fishing nation whose per capita consumption of seafoods is double that of Canada and is the second highest in the European Economic Community. The Netherlands has long been active in both the import and export of fish products. Fresh fish constitutes a major proportion of overall Dutch fish imports but much of this is exported, with or without further processing. Canadian exports of fish products to the Netherlands amounted to \$5 million in 1976 and \$11.5 million in 1977. Prospects are good for a further increase in 1978.

The present ban on herring fishing in the North Sea has greatly increased the demand for herring imports and Dutch processors are

relying on Canadian herring supplies to an ever increasing extent. Quality is a major concern of the Dutch industry. Education and incentive programs sponsored by the government have led to an appreciable increase in Dutch standards over the past ten years. Their own quality improvements make them more conscious of the standards of imported products and less willing to accept lower quality than can be produced at home. Demand also exists for products other than herring especially as fishing quotas have now been rigidly imposed on most species. Traditional Canadian exports of lobster, crab, and salmon, are still finding acceptance in the Dutch market.

WESTERN EUROPE (NON-EEC)

AUSTRIA

The Market

Austria is a landlocked country and fish production is limited to carp and trout. In 1977, imports of fish of all kinds amounted to 52,000 metric tons.

Import Policies

For fish products, stringent food and labelling regulations are

applied. Labels must be in German, use the metric system, and indicate shelf-life.

Export Opportunities

The best chances are for canned fish in oil or special sauces. Price is the major competitive factor. The market for salmon and lobsters is limited.

FINLAND

The Market

Finland imports annually about 20,000 tons of fish for human consumption, out of which 7,000 tons are frozen fillets, 5-6,000 tons are herring, 5,000 tons are canned fish and the rest other fish products and shellfish. In addition Finland imports some 70,000 tons of fish offals and lower-grade fish for fodder.

A major part of the frozen fillets and herring is imported from Norway. Canada is the second largest supplier of frozen fish and herring but far behind in quantity and value. Canned fish is imported from all over the world. The imports of fresh and frozen whole fish are regulated by the Government by import licences which are granted only if domestic catches do not satisfy the demand.

There is a growing demand for Canadian sugar-salt-cured nobbed herring due to EEC restrictions on herring fishing in the North Sea area. The annual consumption of barrelled herring in Finland is 7-8,000 tons. Some 1,500 tons of this is imported from Canada. Total imports of fish from Canada in 1977 were \$1.75 million.

There is constant demand for frozen whitefish from Canada, also salmon fillets and herring. The average consumption of fish in Finland per capita per year is 22 kilograms. The major species consumed are Baltic herring, pike, perch, verdace and whitefish of the domestic variety, and cod and seith of the imported. The Finnish consumer is most conservative in his habits and it will prove difficult to introduce any new species to the Finnish market.

GREECE

The Market

Greece is a traditional maritime nation with a sizable fishing fleet operating in the South Atlantic, the Mediterranean, and the open sea, as well as in coastal/offshore waters.

Although Greek fishermen produce annual catches of between 100,000 and 125,000 metric tons (valued at \$154 million in 1977), Greece still must import considerable quantities of various species of fish products to supplement declining domestic production and cater to traditional as well as new and expanding consumer tastes.

Imports in recent years fluctuated between 21,000 and 27,500 metric tons, with a foreign exchange outlay of \$27 million in 1975.

Main imports in 1976 were wet salted codfish, frozen cuttlefish, canned octopus/cuttlefish, frozen octopus, smoked herring, canned sardines, bonito, mackerel, fish roes, tuna fish, frozen crabs and oysters.

Canada's share of the Greek import market is small. Apart from sales of modest quantities of salted codfish, canned salmon, fresh frozen salmon and salmon roe (total sales \$280,000 in 1977, as

compared with \$62,000 in 1975, and \$135,000 in 1976), higher Canadian prices and long established Greek consumer preferences for traditional species, sizes, cures, and packs not available from Canada, have prevented Canada from obtaining a larger portion of Greece's fish import requirements.

Import Policies

For balance of payments reasons, Greece's import trade is subject to Ministry of Commerce/Chamber of Commerce control for the granting of import permits and allocation of foreign exchange. Despite some administrative delays at times (to control overall levels of imports), permits are usually freely obtained for all fish products outside of certain frozen species. The latter restriction is imposed to protect and assist the domestic fishing fleet. When domestic fishing fleet catches cannot meet market demand, import permits are granted for specific quantities to cover immediate requirements of certain frozen fish species.

Export Opportunities

There is a current and anticipated demand for interesting tonnages of frozen octopus and squid, as well as inexpensive (\$1 per kilo approx.) whitefish and other imported species mentioned above.

NORWAY

The Market

Norway's import requirements for fish and fish products are small because of her own large production. Imports from Canada are restricted to salt herring, frozen salmon, frozen shrimp and canned

crab. At nearly all times the market depends on prices and availability of the items in question domestically. Total Norwegian imports of fish and fish products amounted to \$26 million in 1977. Canadian shipments totalled \$1.3 million.

PORTUGAL

The Market

Fishing is one of Portugal's traditional industries. It provides a fundamental staple of the Portuguese diet and about 60 per cent of animal protein. However, the industry is undergoing one of its most difficult periods. Fish landings have been declining steadily since 1965, when they totalled 429,000 metric tons; the catch for 1977 of 253,000 tons is one of the lowest recorded by Portugal in the past 20 years. Exports have fallen to a low level, with 46,000 metric tons being shipped in 1977 as against 81,000 metric tons for 1968, while imports rose from 60,065 metric tons in 1970 to 86,143 metric tons in 1976 and 108,000 tons in 1977. Canada supplied \$2.1 million of total 1977 imports of fish valued at \$102 million. Fish exports totalled \$67 million in 1977.

Dry salted and wet cod and frozen whiting are the largest imported items accounting for almost 70 per cent of total fish products imported. Norway and Iceland are major suppliers.

Import Policies

With the exception of crustacea which are subject to a 60 per cent

import surcharge, fisheries products are not affected by the austerity measures and import restrictions in force.

The Comissao Reguladora do Comércio do Bacalhau, a government body responsible for the co-ordination of codfish trade and storage, is the sole importer of codfish as well as frozen fish.

Export Opportunities

Salt Codfish — Codfish imports from Canada have been small, however 2,000 tons of cod were ordered from Canada in 1977. There is a shortage of cod in Portugal and Canadian cod is appreciated, especially in the northern part of the country. With the newly declared 200-mile Canadian fishing zone, prospects for increasing imports from Canada seem good.

Other Fish Products — There is a potential market for frozen fish, such as hake, haddock, pollock, redfish and flatfish.

SPAIN

The Market

There is a market for about 1,250 tons of frozen salmon annually in Spain. Canada recently has begun to take a share of this. The best grades are for smoking and the remainder go to make salmon steaks. The market for salt cod, frozen hake and frozen squid is improving. Spain's requirements for other fish varieties are irregular but they do exist. The Spanish domestic catch is about 1.5 million tons per year.

Import Policies

Fish products now come under global quotas and the situation has tightened up considerably. There is usually a month's delay before licence applications are approved but up to now none have actually been refused.

Export Opportunities

Chinook, Cohoe and Silverbright salmon from Canada could represent a regular trade. Opportunities for saltfish, cephalopods and other fish varieties will be on a spot sale basis. Of major interest to Spanish fishing companies is the possibility of joint ventures with Canadian firms, for operations principally within Canada's 200-mile territorial waters and for other fishing areas as well. This may be an important means of penetrating the Spanish market due to regulations recently issued which permit catch originating from joint ventures, involving Spanish firms, to be treated for import and licensing purposes as domestic catch.

The newly declared 200-mile Canadian fishing zone should improve prospects for Canadian fish producers in Spain.

SWEDEN

The Market

Canadian seafood sales to Sweden have increased steadily during recent years. Sweden offers an excellent market for Canadian seafoods, so good that Canada has become Sweden's third largest foreign seafood supplier, preceded only by Denmark and Norway. Canadian seafood exports to Sweden counted at c.i.f. prices totalled \$15.5 million in 1977.

The per capita consumption of fish in Sweden has risen in the last decade to the present stable level of 17.4 kg. The high standard of living in Sweden also makes the market good for more expensive kinds of seafood such as shellfish, salmon, lake trout and eel.

Import Policies

There are no strict government controls on imported seafood. Moreover customs duties are nearly non-existent except for some canned seafood items. There are, however, fish products import levies imposed on some seafood products. These levies, which are flexible, are fixed by the Agricultural Marketing Board. However, these levies are usually not so high that they constitute any marketing problems.

Export Opportunities

There is still room for market expansion of already established items, such as frozen Pacific and Atlantic salmon, frozen and

canned Queen crabmeat, frozen cooked and canned lobster — areas where Canada already is Sweden's number one foreign supplier. In fact the Swedish demand has not been adequately met, mainly due to lack of supplies from Canada.

The short supply situation also hampers increased exports to Sweden of other items such as barrelled herring (salt and spice-cured), frozen cooked shell-off but also shell-on shrimp, frozen Silvereel, frozen Arctic char, frozen and sugar-cured cod roe.

Other products for which a good market potential also exists, are frozen freshwater whitefish and lake trout. The latter was introduced on the Swedish market recently and became a big success. Furthermore, the market would welcome offers for frozen grey sole fillets, halibut, whole or filleted mackerel, frozen scallops, squid and groundfish fillets or blocks.

This market is very attractive and should definitely not be disregarded by Canadian companies looking for new overseas customers or by Canadian producers/exporters already established here. The latter category should, on the contrary, do their utmost to maintain regular contacts with the market and expand sales to Sweden.

SWITZERLAND

The Market

The total demand for fish products has remained virtually constant during the past few years at 26,000 tons or almost 5 kilograms per capita annually. This compares with a total per capita meat consumption of 75 kilograms. The major suppliers of the Swiss market are Denmark (30 per cent) and Norway (13 per cent) while Canada supplies 1 per cent. Of total fish products consumed, almost 90 per cent are imported as the domestic fisheries are small and limited to fresh water products. Imports in 1977 totalled \$60 million, 78 per cent supplied by the eel, 6 per cent by Canada.

Import Policies

Fish products require import permits issued by the Veterinary

Office of the Federal Department of Public Economy, however there is no limitation on quantity.

Export Opportunities

Swiss consumer taste patterns with respect to fish are well established and therefore no change in consumption habits is expected. Traditional Canadian exports of salmon and other salt water fish, as well as certain fresh water species such as lake perch, continue to be in great demand. Canadian shrimp have been expanding their share of the market and possibilities for similar growth exist for other "luxury" items such as crabmeat and lobster.

PACIFIC

AUSTRALIA

The Market

By volume, Australia imports three times more fish and fish products than she exports. By value, total exports slightly exceed imports because the major export item is premium value lobster tails.

Of Australian fish imports, by far the most important single item is frozen hake blocks for use in fish fingers and fish and chips. It is possible that in the future a local species, gemfish, will begin to replace the frozen hake block imports, but extensive Australian exploitation of its own fishery is unlikely to occur soon. The major suppliers of fish to the Australian market are Japan, the United States, South Africa, Britain and New Zealand.

With the implementation of the 200-mile fishing zone, expected within the next few months, Australians should turn their attention more towards their own resources. As consumer awareness increases, along with the availability of fresh fish, consumption levels should arise from the current 10 kg per capita

Import Policies

A tariff reference on fish is currently pending. This inquiry is of considerable interest to us because Canada has margins of

preference on the following canned fish products — salmon; tuna; sardines; cutlets, chunks, flakes or solid pack other than of salmon or tuna; anchovies, mackerel and herring.

Frozen salmon is a prohibited import.

Export Opportunities

Canadian exports of fish to Australia in 1977 reached approximately Cdn. \$15 million, with \$11 million of this being canned salmon. Interesting quantities of frozen fish were sold, most notably scallops. Australia imported significantly more frozen fish in 1976/77 than normal, due to the poor local season. The main beneficiaries of the shortage were exporters of prawns, shrimps and scallops.

Canadians should be able to increase their share of the Australian market, especially for canned products as well as institutional and retail block frozen fish. Canadian suppliers, however, are encouraged to visit Australia more frequently in order to become better acquainted with the institutional and retail packaging needs of this market, and its distribution requirements.

NEW ZEALAND AND THE PACIFIC ISLANDS

The Market

The market for Canadian fish products in New Zealand is restricted to canned fish and amounted to approximately \$2.4 million in 1977. Of this quantity \$1.9 million was canned salmon and \$0.6 million canned sardines. There is also a large demand for canned fish, notably sardines, herring, mackerel and salmon in Pacific Island countries, Tonga, Western Samoa, the New Hebrides and Fiji. Although relatively small, the market offers good continuing sales prospects.

Import Policies

To provide a level of protection for the New Zealand fishing

industry, the import of other than canned salmon and sardines and also caviar and peeled crustaceans is subject to import licensing restrictions. Fishery health regulations prohibit the import of fresh, frozen and smoked fish from North America.

Export Opportunities

Opportunities exist for sales of most Canadian canned fish, especially salmon and sardines, but depend heavily on prices relative to those of other suppliers, Britain, Japan and the U.S.S.R. There is a continuing unfilled market for sardines, herring and mackerel in several of the Pacific Island nations.

ASIA

BURMA

The Market

Burma is a socialist country. Imports are the exclusive domain of the various state enterprises which control all activity in their respective economic sectors. Procurement is effected on the basis of international tendering, and price is the overriding consideration

in determining sources of supply. Burma's ability to import is limited owing to a chronic shortage of foreign exchange.

There are very limited opportunities for commercial sales in the fish product sector.

CHINA, PEOPLE'S REPUBLIC OF

The Market

The Chinese are self-sufficient in the production of fish products and export a small quantity of their production to Japan.

HONG KONG

The Market

Marine fishing forms one of Hong Kong's most important primary industries. In 1976, marine fish landings amounted to nearly 100,000 tons which represented 92 per cent of the local consumer demand. At present, the local fishing fleet consists of 5,500 vessels of which 93 per cent are mechanized.

The Fish Marketing Organization operates seven wholesale fish markets sited at points to provide convenient services to the public. Revenue is obtained from a six per cent commission on the proceeds of sales of fish. Any surplus earnings are reinvested in industry services such as low interest rate loans and marketing improvements.

The consumption of fish in Hong Kong is substantial. Canadian fresh, frozen and smoked salmon enjoy a good market share.

Demand for cod, sole, flounder, however, is limited. Declining re-export business has resulted in further decrease in sales of salted herring. At present, many of the species from Canada are still unknown to this market, and if Canada makes these species known to the trade, chances of promoting Canadian fish can be developed.

Import Policies

There are no government restrictions on the import of fish to Hong Kong.

Export Opportunities

Good prospects exist for frozen abalone, shrimp, lobster and dried squid. The main sources of supply are China, Thailand, South Korea, Vietnam, Macao, Australia and South Africa.

INDIA

The Market

The development of India's fishing industry is currently being assigned a high priority. Current production of fish is approximately 2 million tonnes per year, virtually all of which is destined for local consumption with the exception of about 50,000 tonnes of shrimp which are exported.

Resource surveys have identified major supplies of sardine, mackerel and white bait off India's west coast, as well as substantial resources of shallow water fish. In order to develop the

industry, plans have been made for the import or local construction of up to 200 deep-sea fishing vessels and the appropriate shore installations.

There is no potential for sale of Canadian fish to this market.

Import Policies

Foreign exchange is not available for the import of fish, with the exception of Bangladesh where a special trade agreement is in effect. No changes are expected in this policy.

INDONESIA

The Market

Because of the extremely low annual per capita income, the average Indonesian consumer is unable to purchase Canada's relatively high cost fish products. Additionally, Indonesia has introduced high registration fees to discourage the import of food products, except for essential items. Also, the Indonesian Government is making every possible effort to develop its own fishing industry, usually through joint ventures with foreign firms. For example, the Indonesian Government and a Japanese firm have developed a very modern fishing fleet and processing plant in Denpasar, Bali, for the purpose of exporting frozen fish to Japan.

It is most unlikely that Canada will be able to sell fish products in this country in the foreseeable future even if the per capita income

increases. The local fishing industry will inevitably be protected for a long time to come.

Import Policies

In order to limit food importing to essential items only, the Indonesian Government has introduced licensing regulations which virtually preclude imports of Canadian fish products. Importers are now charged a registration fee of U.S. \$250 per label, plus U.S. \$25 for each packaging type.

Export Opportunities

There is virtually no market in Indonesia for Canadian fish products, either now or in the foreseeable future, for two reasons: the low annual per capita income; efforts made by the Indonesian Government to protect its own fishing industry.

JAPAN

The Market

Japan is the world's major fishing nation with a domestic catch exceeding 10.5 million tons annually, of which six million tons are processed for fisheries products for both domestic and foreign markets. Japanese are highly dependent on fish as the number one source of protein, per capita consumption being 33.3 kg bone out per year. Fish species include tuna, skipjack, yellowtail, salmon, flatfish, shrimps, prawns, squid, cuttlefish, octopus, shellfish, pollock, saury, mackerel and sardines. Japan's annual imports of fishery products are approximately 500,000 to 600,000 tons, mostly high grade edible fish and shellfish. In 1977, Canadian fish exports to Japan were valued, f.o.b. basis, at \$142.1 million, of which \$101.4 million was herring roe or other fish roe. Prime products included Pacific salmon and salmon roe, herring roe, bluefin tuna, capelin, squid, abalone, fresh water smelt.

The current fish market in Japan is in a period of transition as Japan adjusts to the effects of 200-mile economic zones which have significantly reduced the Japanese fish catch. One effect of this is to increase the potential market for imported fish. In addition, Japan is expected to actively seek out new sources of

protein. These could be in the form of under-utilized fish species, antarctic krill, or meats such as pork, chicken and beef.

Import levels will tend to fluctuate due to increasing supply pressure resulting from the introduction of economic zones by many countries. This situation is exemplified by a more than 100 per cent increase in the quota for herring, squid and pollock for fiscal year 1977.

In early 1978, Canada and Japan signed a bilateral fisheries agreement that permits Japanese fishing vessels to fish in Canadian waters for a portion of stocks surplus to Canadian requirements. Japan will work with Canada to facilitate the expansion of markets for Canadian fish and seafood products.

Export Opportunities

Due to the pressures on the Japanese to maintain fish supplies for their populace, abundant opportunities exist for almost all fish products. All opportunities continue to be highly dependent on price and quality factors. Though difficult, innovation in meeting the fish specialty item market could be rewarding.

KOREA

The Market

Korea offers only a limited market for fish and fish preparations; total imports in this sector were \$13 million in 1977. Imports of herring and cuttle fish (fresh, chilled or frozen) accounted for the greater part of this total — \$7.3 million. Herring and cuttle fish imports from Canada amounted to \$0.5 million. The roe is extracted from the imported herring and re-exported to Japan. The remaining herring is processed either into meal for local consumption or into fillets for export to Japan. The cuttle fish is also processed locally and re-exported to Japan.

Import Policies

Because of the importance of the domestic fishing industry to the economic wellbeing of a large number of Koreans (some 241,000 Koreans were employed in this sector in 1977, mostly in the coastal and offshore industries), the government does not permit the import of most fish products or preparations for domestic consumption, except frozen cod and herring.

Export Opportunities

With a growing number of countries declaring 200-mile economic zones, thereby closing many fishing grounds to exploitation by the

Korean deepsea fishing industry, the government has been endeavouring to conclude bilateral fisheries agreements with many coastal states to allow Korean boats to operate off their coasts. Korean deep sea fishing firms have also been investigating the possibility of entering into joint ventures with foreign firms to enable them to continue to exploit their traditional fishing grounds. In the longer run, if the Koreans are unsuccessful in these endeavours and if they fail to take measures to conserve their own coastal and offshore fish resources, imports of additional lower priced fish such as mackerel, capelin, hake, saury, and squid may be required to meet domestic demand although such imports would likely be only unfinished or semi-finished products.

At present, because of reduced deep sea and offshore catches, Korea has again become a market for fishmeal for use in the manufacture of feed. In 1978 the Korean Feed Association plans to import up to 15,000 metric tons of fishmeal (imported 6,000 M/T) for this purpose. Although Peru and Chile are in a strong competitive position to fill these requirements, opportunities do exist for Canadian firms which are prepared to aggressively pursue the market.

MALAYSIA

The Market

The Fisheries Development Authority (MAJUJIKAN), in conjunction with the Department of Fisheries, plans to modernize the fishing industry over the next five years. Programs include purchase of 220 fishing boats to be made locally, the establishment of five on-shore processing plants at Genting, Chendering, Kuala Keluang, Kuantan and Kuala Sedili. At all major fishing harbours, shore facilities such as cold rooms, auction halls, and sorting and packing facilities will be provided. Emphasis will also be given to the development of aquaculture to supplement sources of fish production with a view to increasing protein intake and creating employment opportunities. The Malaysian government has obtained a U.S. \$27 million loan from the Asian Development Bank for this project. In 1977 Malaysia imported 62,000 tons of fish to supplement domestic supply.

Import Policies

Importers of refrigeration equipment may require a licence.

Export Opportunities

In general, the opportunities in Malaysia for a great variety of cultured fish, shellfish, and other water creatures are considerable. However, utilization of this potential is still hampered by the lack of technology at the practical production level. A market exists for companies manufacturing industrial refrigeration for ship and shore use, and in the development of aquaculture. There is a good market for frozen fish, canned salmon, sardines, horse mackerel and herring.

PHILIPPINES

The Market

The Philippines is a major producer of fish products for domestic consumption. Because of this there is only a very limited market

for imports, and import restrictions reduce the opportunities for Canadians to only a few products such as limited amounts of canned salmon and breeding stock for fish farming.

SINGAPORE

The Market

Singapore has a very small fishing industry. Domestic production is very limited because the territorial waters limit is only about five miles. Traditionally, Singapore depends on neighbouring ASEAN countries for its fish supply.

Singapore consumed about 60,000 tons of fresh fish in 1977 of which about 25 per cent was caught domestically (by inshore and offshore fishing) and 75 per cent was mainly supplied by its neighbour Malaysia. The number of licensed fishermen has been decreasing over the years (total was about 2,000 in 1977).

Although Singapore will have to rely more heavily on imports, not all types of fish can be accepted here. Accordingly, the size of market is rather limited for imported frozen fish and fish products since volume/demand for frozen quality is imported to cater mainly for the one per cent expatriate population (total population 2.3 million) and the ship chandling and hotel business. In addition, the preference of the majority of the 78 per cent Chinese for fresh products seems to be a significant factor against high imports of frozen fish. Aquaculture is practised to increase domestic

production but with limited land area, there is increasing pressure to find alternative domestic production methods. Canada's share of this market has traditionally been in salmon. Prospects for other Canadian species are very limited since the large Chinese population does not eat these qualities. But Canadian suppliers should contact the Canadian High Commission in Singapore if they have supplies which may prove suitable for consumption here since the Singapore Government is encouraging the people to eat more frozen fish.

Singapore will not have a 200-mile limit because it is considered to be in the category of a 'land-locked and geographically disadvantaged state' due to the proximity of Malaysia and Indonesia.

Import Policies

No import duties or other restrictions.

Export Opportunities

Fresh, frozen and smoked salmon and sole fillets; canned sardines and salmon (preferred in tomato sauce); canned seafood (e.g., abalone); very limited market for other Canadian species.

THAILAND

The Market

Thailand is a major fishing nation producing approximately 1.5 million metric tonnes of marine fish and 185,000 metric tonnes of fresh water fish per year. The annual catch of shrimps and prawns amounts to approximately 81,000 metric tonnes per year. Thailand exported approximately \$83 million worth of various fish types in 1977 a modest portion of this went to Canada.

There is a small demand in Thailand for specialty fish imports, and Canadian suppliers have sold modest amounts of salmon to local smoke houses. The consumption of smoked salmon is restricted to the foreign community, hotels and airlines.

AFRICA AND MIDDLE EAST

ALGERIA

The Market

Fresh or canned fish may not be imported under current Algerian trade policy.

CYPRUS

The Market

Imports in 1977 totalled only \$3.2 million and opportunities are very limited.

EGYPT, LIBYA, SUDAN

The Market

Egypt annually imports about 500 metric tons of horse mackerel, mackerel and sardines. Until 1975 the major suppliers were Bulgaria, Poland, Romania and China. Libya imports small quantities of preserved fish mainly supplied by neighbouring Mediterranean countries. In Sudan, imports are negligible.

Import Policies

Egyptian import rules and regulations require suppliers to be represented by a local agent. In Libya, however, the government

has assumed almost total control over procurement and importation, leaving the local distribution and servicing functions to private business. Agency representation is the best method for ensuring effective marketing in the Sudan.

Export Opportunities

Public tenders issued twice yearly in Egypt should be pursued. Spot sales are possible in the territory provided that Canadian prices are competitive.

IRAN

The Market

With total fish and shrimp production in Iran in the year ending March 20, 1976 of 28,800 tons, and imports in the year ending March 20, 1977 totalling \$1,090,000, the relatively insignificant position of fish in the Iranian diet is evident. Production figures do exclude, however, the private catch of the peoples living along the Caspian in the north and the Persian Gulf in the south, and the small but growing private fish-farming industry. Nevertheless, with nutrition playing an increasingly important role in Iran, and beef quotas not being met, fish production and imports are beginning to increase. A fisheries development program, concentrating initially on improved shore and distribution facilities, has been launched by the government's Southern Fisheries Company.

Import Policies

The import of fresh and dried fish is subject to the prior approval of the Ministry of Commerce after consultation with the Ministry of Agriculture. Purchases are by international tender by the Southern Fisheries Company. The import of prepared or preserved fish is unauthorized.

Export Opportunities

The Government of Iran has created a new fisheries company whose methods of operation have not yet been defined. There may be opportunities for co-operation.

IRAQ

The Market

The 1976-80 five-year development plan has set targets for fish catches totalling 233,000 tons and the breeding of 65,570,000 fish. The five-year plan aims to increase fish consumption at the expense of red meat. Some \$238 million is allocated to the State Fisheries Company during this plan to cover operation of 26 fishing vessels, 16 of which are specially built for shrimp fishing; the joint fishing venture with the Soviet Union; a survey of inland and Gulf waters; and construction of wholesale and retail distribution networks.

Iraq is a socialist country, consequently nearly all imports are made by state organizations and usually through secret tenders. In the case of canned fish products, the sole importer is the Public Company for Trade in Foodstuffs, whose main fish imports are sardines from Spain, Bulgaria and China. In addition to sardines, Iraq also imports frozen fish. A tender call was made public three months ago for 15,000 tons of frozen fish, but the species asked for were not available in Canada. As for smoked, salted and unsalted fish, Iraq is not in the market for such products.

ISRAEL

The Market

Israel imports annually an average of 4,000 tons of fish fillets, 1,000 tons of tuna, 1,500 tons of mackerel and herring, and 6,000 tons of other species of fish. Overall, the country represents an

annual market of approximately \$10 million. Israel primarily imports from The Netherlands, Germany, and the Scandinavian countries.

Israel — (cont'd)

Import Policies

The Ministry of Commerce and Industry issues import permits provided imports and price will not compete with local industry. A kosher certificate is required from the Rabbinical authorities of the country of origin in addition to the normal health certificate. Also

because of kashrut laws, no shellfish or fish without scales can be imported. Whole fish can only be imported for industrial purposes.

Export Opportunities

There is a constant demand for the above-mentioned kinds of fish. Salmon is of particular interest.

IVORY COAST, MAURITANIA, SENEGAL, GUINEA

The Market

Although the Ivory Coast is on the sea, its fishing industry is not sufficiently developed to meet domestic requirements. Senegal, on the other hand, is a net exporter of fish and fish products and is the foremost supplier to the Ivory Coast. In spite of the importance of fish exports in relation to export earnings, Senegal is attempting to upgrade and mechanize its fishing sector. Canadian companies have already met with some success as consultants in this country, largely through CIDA aid programs.

Export Opportunities

In 1977, Canada sold approximately \$100,000 worth of fish to West Africa. The Ivory Coast alone imports some 10,000 tons per month, most of it, however, supplied by the U.S.S.R. and Poland. The shipments are made up of the cheapest fish available and sold at a very low cost. Canada could conceivably sell 2,000 to 3,000 tons of low-grade fish per month if it were competitively priced. Mauritania and Guinea have also taken preliminary steps to improve their fishing industries through the aegis of international and bilateral financing in order to partially meet their domestic protein requirements.

KENYA

The Market

Kenya is largely self-sufficient in fish products, with commercial fishing carried on in the Indian Ocean, Lake Victoria and Lake

Turkana. There is a small market for imported fish products to cater to the tourist trade and expatriate populations.

LEBANON, SYRIA, JORDAN

The Market

Imports are negligible in Syria, Jordan and Lebanon. Agency

representation is the best method for ensuring effective marketing in these countries.

MALAWI

The Market

Malawi is a small, landlocked, Central African country, whose population of 4.8 million relies mainly on subsistence agriculture for its livelihood. Approximately 250,000 people participate in the cash economy and consequently purchasing power per capita is extremely low — \$150 per annum.

Malawi is more than self-sufficient in basic foodstuffs. For Canadian exporters of fish products, the market must be considered closed or very limited.

MOROCCO

The Market

Morocco is a marginal and substantial exporter, so minimal opportunities exist.

MOZAMBIQUE

The Market

The best that can be hoped for in the short-to-medium-term economic situation in Mozambique is for stagnation at the current low level of activity. The country faces severe balance of payments problems. There is almost no commercial or economic

infrastructure. Imports are controlled by a licensing system which is restricted to essential requirements. Under these circumstances, the market for Canadian exports of fish products must be regarded as closed or very limited.

NIGERIA

The Market

With a large population (at least 80 million), Nigeria has not been capable of establishing self sufficiency in basic food products. This, combined with an ever-increasing level of affluence, has resulted in considerable demand for food product imports from overseas. Last year's import bill exceeded \$1 billion for food and beverage sectors alone.

Import Policies

Due to the magnitude of imports of food products and beverages, the Nigerian Government has placed a number of items of food and drink under strict import licensing. In addition, they have centralized the acquisition of certain products in the hands of the Nigerian National Supply Company. The supply company has

been charged with maintaining sufficient stocks of what are considered to be essential commodities in order to act as a buffer against shortages, to which Nigeria is very prone, because of such problems as hoarding, profiteering and shipping problems. The Nigerian Government has launched a major program known as Operation Feed The Nation in order to mobilize resources for food production domestically. Fisheries production will be expanded through major programs of federal and state governments.

Export Opportunities

Opportunities for Canadian exporters include fish and fish products (especially preserved fish either dried or canned), plus technology for large-scale fisheries.

SAUDI ARABIA

The Market

Imports of fresh and frozen fish totalled \$761,000 in 1976 and \$446,000 in 1975; salted, dried and smoked fish \$580,000 in 1976 and \$230,000 in 1975; fresh and frozen crustaceans and molluscs \$916,000 in 1976 and \$232,000 in 1975. The main supplying countries were the United Arab Emirates, Kuwait, Syria, Greece, Denmark, Britain, The Netherlands and the United States.

Import Policies

The market is wide open.

Export Opportunities

Limited. There are supermarkets in the three major cities which cater to the 70,000 European and North American expatriate residents and high income Saudis. Retail-packed North Atlantic fish and shrimps are stocked. There are occasional enquiries about fresh lobsters and smoked salmon. Canned sardines and tuna are the favourite fish products of the local community. Japan dominates the canned tuna market while canned sardines are supplied from Europe, South America and the Far East.

SOUTH AFRICA

The Market

The country's main sources of fish product imports are Japan and Britain. Canadian exports of fish products are composed mainly of canned and frozen salmon.

Export Opportunities

There is a definite demand for Canadian fish products in South

Africa, especially smoked salmon, with increasing enquiries for frozen salmon. With competitive prices and regular supplies, Canadian producers should well be able to capture a larger portion of the market than they now hold.

TANZANIA, UGANDA, ETHIOPIA, SOMALIA, MADAGASCAR, SEYCHELLES

The Market

Despite the extensive sea coasts in most countries in this region, fisheries are under-developed and fish is not widely consumed. Imports of fish products are small.

Import Policies

Import restrictions generally prohibit sale of most Canadian fish products.

Export Opportunities

There may be some market for canned sardines or similar types of canned fish in Ethiopia.

The Seychelles is likely to embark on major fisheries development in the near future and may be looking for sources of fisheries expertise. Contact, S. E. Vidot, Ministry of Agriculture, Fisheries and Food, P.O. Box 54, Victoria, 8, Republic of Seychelles.

TURKEY

The Market

As Turkey is self-sufficient in fish production and in fact is a net exporter of fish products, the government prohibits any importa-

tion in this sector. Consequently no market opportunities exist for Canadian suppliers in this area.

ZAIRE

The Market

One of the products of Canadian origin for which there is some potential on the Central African market is canned and dried fish.

However, it should be pointed out that these products for mass consumption have to be offered at very competitive prices if they are to compete with the traditional European and Asian suppliers.

ZAMBIA

The Market

Economic conditions in Zambia remain depressed. Copper prices, while recovering from their historic lows of 1974, have not rebounded to levels sufficient to provide both the revenue for Zambia's development programs and the foreign exchange to pay for the imports necessary to keep the economy functioning. The outlook for a sustained increase in copper prices in the near-to-medium-term future is not good. Copper sales provide 95 per cent of total national foreign exchange earnings. Consequently, prospects for export sales to Zambia remain limited.

To cope with the shortfall in foreign exchange earnings, the government has instituted a stringent system of import licensing

and control. Licences are issued on a priority basis with emphasis on providing essentials for the populace and a few key industries. Another factor which inhibits access to this already restricted market is the payment situation. At present, the delay between payment for imports in local currency to a commercial bank and remittance of the equivalent foreign exchange by the Bank of Zambia ranges from seven to 10 months, depending on the currency involved and the priority of the imported goods in the pipeline.

Under these circumstances, the market for Canadian fish products must be considered extremely limited.

UNITED STATES AND BERMUDA

ATLANTA

The Market

The seven Southeastern states are an excellent market for seafood. Canadian products are well accepted and enjoy a reputation of consistently high quality, and correct weights and measures. Groundfish are in constant demand in all areas and Florida provides an excellent market for shell fish, which are imported in considerable quantities from as far away as India.

Import Policies

There are no import restrictions on seafood.

Export Opportunities

Groundfish demand continues to increase with calls for flounder in six, seven and eight ounce portions. Many buyers prefer to work through brokerage companies rather than directly with producers. Seafood shipments are not governed by ICC regulations.

BOSTON

The Market

Blocks — of the 385,140,000 lb. of blocks imported by the United States, Canada supplied 80,284,000 lb. or 21 per cent. Growth in consumption of sticks and portions in the fast food market continues but not at as great a rate as in 1977. The rapid increase in the price of meat has resulted in somewhat higher sales of fish at the retail level. However, if fish prices rise too high there will be consumer resistance. Prices for blocks have remained steady.

As indicated above Canada will supply an increasing percentage of blocks to the U.S. as European catches decline. Pollock block imports may be further restricted because Japan and Korea are facing further restrictions in Soviet waters.

Frozen cod fillets — Canada provided about 20 per cent (26,174,000 lb.) of U.S. market. Fresh haddock and pollock — Canada provided 90 per cent (2,452,000 lb.) of U.S. market. Frozen haddock and pollock — Canada provided 21 per cent (9,864,000 lb.) of U.S. market.

Consumption of frozen groundfish fillets is expected to increase slightly in 1977/78. Supplies of cod, turbot, and ocean perch are ample, however flounder is continuing to be in short supply.

Exports of frozen fillets by the Scandinavian countries are being increasingly diverted to other European countries. This may

contribute to higher prices in the U.S. Fresh groundfish fillets are being more widely distributed at the institutional and retail level during 1978. Flatfish fillets, especially, and boneless packs are becoming more popular.

Import Policies

Quotas instituted by the National Marine Fisheries Service have resulted in lower fish landings in New England so far this year with little recovery expected for the rest of the year. This may force fresh prices up, thus possibly creating a better market for Canadian fresh fillets. However, with present atmosphere vis-a-vis counter-vail complaints and lower quotas for U.S. fishermen an increase in imports from Canada could create further animosity.

At present Canada's export of blocks to the U.S. is not threatened. However, should domestic landings improve, the U.S. may be expected to increase its block and fillet processing capacity either through more on-shore processing capacity or co-operative arrangement with foreign freezer trawlers.

Export Opportunities

Interest in all fish and seafood products remains high in this area (Maine, Massachusetts, New Hampshire, Rhode Island, Vermont).

BUFFALO

The Market

While one may hear and read about the economic problems of the Upper New York area, due to various off-set programs such as high unemployment benefits, generous welfare payments and the federally funded food stamps program, this sector of the economy has remained relatively unaffected. As a result, this traditionally good market for Canadian producers has not only remained stable but in most cases has actually grown, especially for such products as canned and frozen fish. At present it appears this sector will continue to grow, both in dollar and future potential.

Import Policies

Before attempting to market their products in Upper New York, Canadian firms must ensure that the product and its label conform to U.S. standards. Companies must never assume that because the product and/or label are acceptable to Canadian authorities, they will be acceptable to U.S. officials.

Export Opportunities

This sector does not lend itself to specific opportunities, although brokers are constantly in touch with the Buffalo Consulate seeking new lines.

CHICAGO

The Market

Chicago is a regional centre for the wholesale distribution of all varieties of seafood to both the retail and institutional markets. A large number of distributor firms and brokers specialize in this category of food product. Both fresh and frozen products are involved. No local production to compete against. Canadian fish and related products, both fresh and saltwater, move into this area (Illinois, Iowa, Missouri, Nebraska, Southern Wisconsin) in

substantial quantities and are both well recognized and received, so new offerings are reasonably easy to promote to the trade.

Import Policies

No policies in effect that tend to restrict a free flow of products.

Export Opportunities

Specific opportunities exist for IQF fillets and batter-dipped and/or breaded fillets for retail and institutional use.

CLEVELAND

The Market

There is an exceptionally good market for a wide variety of fresh, frozen and canned fish products. Demand consistently exceeds supply for competitively priced products. Import distributors account for most sales through local brokers, and two major Canadian firms have their U.S. sales office headquarters in Cleveland. In addition to retail markets, a growing volume of business is developing with the institutional sector as well as with local fish processors. An in-depth fish market survey has just been completed for the Trade Post territory (Ohio, Kentucky, West Virginia, Western Pennsylvania).

Import Policies

There are no major legislative controls, other than labelling requirements for canned and frozen products being sold at the retail level. Local and state game preservation legislation may prohibit importation of certain fish species or sizes.

Export Opportunities

Fresh and salt water fish, shellfish, but must be competitively priced with other foreign imports.

A food sales meeting and an in-store promotion is scheduled for this territory before the end of the fiscal year.

DALLAS

The Market

The businessman in this area (Texas, Arkansas, Oklahoma, Kansas, Louisiana) who traditionally sells U.S. food products to other countries often needs additional sources to fill his customer's needs. This is especially true for such items as fish. Fish are currently being sold into the Dallas/Houston area.

Export Opportunities

Major quantities of fish are needed to fill requirements in third countries through local businessmen who export food products from here. Canadian producers prepared to work through and with this type of organization probably could uncover excellent opportunities and sell if price and quantities can be met.

DETROIT

The Market

Trade Post territory, which includes Michigan, Indiana and Toledo, Ohio, has a total population in excess of 15,300,000 and annual food sales in excess of \$11 billion. Supermarket food chain stores account for practically 100 per cent of total food sales and major chains including Krogers, Farmer Jacks, Chatham Supermarkets and Allied Supermarkets handle over 55 per cent of total food sales in post territory. Food sales in the Metropolitan Detroit market, which includes Wayne, Oakland, Macomb, Lapeer, Livingston and St. Clair Counties, total more than \$2.8 billion. Farmer Jack Supermarkets, which operate 75 stores in this market, account for more than \$547.5 million and hold a 19.51 per cent share of the market. Chatham Supermarkets Incorporated, with sales of \$475 million and 16.54 per cent of the market come in second.

Traditionally, Detroit has been one of the best markets for Canadian freshwater fish in the United States and the market for these products continues to be strong despite increased competition from saltwater fishery products. Most of the freshwater fish

entering the Detroit market come directly from Canada; shipments of pickerel fillets from Europe, particularly Poland, have been noted and are becoming popular especially with seafood restaurant chains. Eastern Canadian fishery products sold in post territory reach this market via the traditional distribution network out of Massachusetts.

The retail food industry accounts for over 85 per cent of fish product sales in Detroit post territory. Major Canadian fish processors and exporters contact fishery products buyers in supermarkets direct, medium size and small Canadian fishery products packers and exporters frequently use the services of a broker to call on the supermarket buyers and fish wholesalers serving the trade. Frozen ocean perch, cod and haddock are extremely popular; fresh lake perch and white bass fillets are in strong demand and Canadian producers may be assured of a ready market. Breaded fish products including perch, cod, haddock, scallops, scrod, etc., are quite popular and sales are increasing yearly.

LOS ANGELES

The Market

Canadian fish products are widely and favourably accepted in this market (Arizona, ten southern counties of California, Clark County in Nevada, New Mexico). Consumer demand for both shellfish and fish are excellent.

Import Policies

All canned fish products must meet U.S. labelling requirements as stated by the Federal Food, Drug and Cosmetic Act and the Fair Packaging Act. It is important that Canadian exporters study these regulations in detail, as goods not meeting them could be

forbidden entry into the country. A copy of the regulations may be obtained by writing to the Superintendent of Documents, U.S. Government Printing Office, Washington, DC20402.

Export Opportunities

In the 10 southern counties of California, there are approximately 146 million pounds of fish consumed annually, offering the Canadian suppliers an excellent market for their product. There are some 80 fish importers/brokers in the Southern California region. For a list of names and addresses, contact the Los Angeles Consulate.

MINNEAPOLIS

The Market

Having one of the highest U.S. rates per capita fish and seafood consumption among inland areas, the Minneapolis Trade Post territory (Minnesota, North and South Dakota, Montana east of Divide, Northern Wisconsin) remains a strong market for both ocean and freshwater products. Several major Canadian packers are well established and importers express continuous interest in new sources.

Import Policies

No specific problems other than USDA regulations where applicable.

Export Opportunities

The Minneapolis Food Products Show, which takes place during the winter months, provides an excellent opportunity for product exposure to the retail and institutional trade.

NEW YORK

The Market

The New York marketing area (Connecticut, 12 northern counties of New Jersey, southern New York) has had a long historical supplier/customer relationship with Canadian sources. More products in this sector could be sold if the supply were available. Demand in many species continues to be strong especially in lobster and scallops. The import of Canadian scallops to this country will likely surpass last year's figure. The U.S. Department

of Commerce reports that almost all the scallops imported here during the first four months of 1978 were from Canada — 83 per cent of total imports. Imports of scallops from Canada for this period were 5.3 million pounds, 17 per cent above the 1977 level and more than twice the 1972-76 average. There is more interest in dry salted fish primarily for the Hispanic/Caribbean trade here.

PHILADELPHIA

The Market

Wholesale seafood merchants in the Philadelphia Trade Post territory (Delaware, Maryland, nine southern counties, New Jersey, eastern Pennsylvania, Virginia, District of Columbia) market \$50-\$70 million annually to institutional, restaurant, and retail markets. There is a growing demand for seafood as well as fresh water fish with local fast-food chains, food processors, and institutional distributors. Excellent opportunities exist in the mid-Atlantic for the sale of individually quick frozen cod, haddock, yellowtail, flounder, and sole. Under quotas imposed on U.S. fishermen by the Fishery, Conservation and Management Act of 1976, domestic suppliers are restricted. The market continues to be strong for lobsters and scallops.

Import Policies

Imports of fresh or frozen fish must conform to FDA regulations. Sodium nitrate in seafood is illegal in the U.S. as it is considered a carcinogen.

Export Opportunities

The annual Canadian food products promotion held in Philadelphia each fall provides an excellent opportunity for Canadian suppliers to obtain product exposure to brokers, distributors, retail buyers and the institutional trade.

SAN FRANCISCO

The Market

Seafood products, in general, are in great demand in Northern California — both for local consumption and to satisfy the increased activity of Japanese, Korean, and Taiwanese buyers, who are buying for re-export to the Pacific Rim. In recent years Canadian, and particularly western Canadian, products have been consistently offered at prices higher than western U.S. products, but this situation is quickly changing. Bilateral fisheries management agreements, lower catches, and ever-increasing demand has narrowed — if not yet completely eliminated — the competitive gap and local resistance to Canadian prices. Canadian west coast products have benefited most since the freight costs associated with moving seafood from the Maritimes continues to make it less attractive.

Because of the range of clients — and tastes they represent — brokers and distributors not only are searching for any fish variety but also for almost any type of pack, from blocks for reprocessing to frozen retail packages, smoked sides and portioned servings for the institutional trade. Sales of Canadian seafood have been quite strong throughout the territory, being limited primarily by the availability of sufficient product. One exception, however, is freshwater fish and mackerel which, despite growing demand, have not been well promoted in Northern California or the Rocky Mountain States.

Import Policies

Tariff and import regulations are the same as those which apply elsewhere in the United States.

There are no regional restrictions, but federal health, sanitary, packing and labelling regulations applicable to seafoods are rigidly enforced.

Export Opportunities

Opportunities are not unlimited, but a strong export market does exist for most Canadian seafood products, notably:

- Fresh, frozen, canned and smoked salmon (price competition from the U.S. Pacific Northwest is strong)
- Shellfish of all types
- Groundfish
- Retail packs and pre-packaged, portion-controlled servings for institutions.

Experience has shown that the best way for Canadian suppliers to capitalize on the ongoing opportunities is to work closely with seafood brokers, agents or distributors — most of whom have their headquarters in the San Francisco Bay Area and are well known to the San Francisco trade officers.

SEATTLE

The Market

The Pacific Northwest consumption of edible fish products is above the U.S. national average of 12.9 pounds per capita. It is estimated to be 15-20 pounds per capita, giving a regional market size of between 105-140 million pounds. In dollar terms, the apparent Northwest market is \$90-\$100 million at the processor level. Canada in 1977 shipped some \$11 million worth of fisheries products, including shellfish, into the Northwest. Some of this product is either further processed here or consolidated and shipped to other U.S. markets.

Primarily, the Northwest consumes the less expensive species, such as whitefish fillets, fish portions, and sticks, sole, snapper and rock fish. The more expensive salmon, halibut, and shellfish are not regularly consumed because of relatively high prices. Little freshwater fish and east coast species, other than in processed form through the nationally distributed brands, are consumed because of price. Both of these types are expensive to transport and enjoy little of the market in the Northwest. The exceptions are small quantities of shellfish and other items best categorized as gourmet specialties.

The industry distribution patterns are extremely mixed. There are some six large processors and many smaller ones. These are supplemented by brokers and distributors selling to the major retail chains. In certain cases, Canadian suppliers sell direct to the chains.

Import Policies

The fishing industry in the Northwest has been significantly

shaken by a number of events in the recent past. First, in the salmon industry the "Boldt" decision expanded the native peoples' fishing rights at the expense of existing fishermen and has led to bitter confrontations.

Of equally far-reaching impact has been the Law of the Sea negotiations, and particularly the 200-mile fishing zone declarations by the U.S. and Canada. With proper management, this is likely to lead to a new expansion of the local fishing industry in the long term.

Finally, there is an immediate continuing impact of FDA regulations on Canada's exports, particularly with respect to contaminants. However, these regulations are well known, and no substantial changes are foreseen.

Export Opportunities

In the short term, the nature of the market should remain substantially the same. That is, it is largely oriented to the west coast supplies because of costs. There are opportunities for reliable supplies and much flexibility with respect to distribution patterns. At the same time, there is also some opportunity for specialty items.

In the long term, the nature of the Northwest industry could change with the new fishing zone. This could mean expansion of the existing processing plants and new opportunities. The attitude of the U.S. government toward joint ventures with non-U.S. companies in the fishing industry is now being formulated and will likely specify ground rules.

BERMUDA

The Market

Bermuda depends totally on imports for the basic needs of its 55,000 inhabitants and the 500,000 tourists who visit the island each year.

In 1976, Bermuda's imports from all countries totalled \$165 million. In 1977 imports from Canada (the third largest supplier) totalled \$11 million. Canadian exports to Bermuda include food (40 per cent of our exports), apparel, textiles and footwear, electrical goods, machinery, paper products, furniture, etc. .

Although Bermuda is a small market, it is perfectly tailored for the many small and medium size Canadian manufacturers. The Canadian Consulate General, New York City, has established and maintains close contacts with Bermudian importers.

The lower priced Canadian dollar and the slowdown in the rate of inflation in Canada should contribute to increased competitiveness of Canadian products in Bermuda.

CENTRAL AMERICA AND CARIBBEAN

COSTA RICA

The Market

No market. Costa Rica is exporting fish products and is in the process of upgrading the fishing industry.

CUBA

The Market

Cuba imports relatively few fisheries products. Most of the requirements for fish and sea products are obtained from local production, which is one of the industries that has achieved considerable growth during the past decade. Prospects for sales of

Canadian fisheries products may develop as a result of the bilateral fisheries agreement.

Import Policies

Alimport is the Cuban state trading agency responsible for importing all fisheries products. Offers can be sent via the Commercial Division, Canadian Embassy in Havana.

EL SALVADOR

The Market

El Salvador exports fish products, mainly shrimp and lobster tails, and supplies most of its own internal consumption needs.

the country's fishing industry. Several studies are currently in progress and major development projects are expected to be implemented in the future.

There is potential for limited spot sales of canned fish specialties, but Canada has not made any significant sales in recent years.

Export Opportunities

There are no significant opportunities for Canadian sales to El Salvador.

Import Policies

The Government of El Salvador is actively attempting to develop

GUATEMALA

The Market

Guatemala does not import significant quantities of fish and fish products with the exception of a small market for canned specialties.

the local fishing industry (and engaging foreign expertise and technology), mainly geared to exports.

Generally, per capita fish consumption is relatively low in Guatemala, and only a very small proportion of the people can afford processed imports which retail at high prices.

Canned fish products are currently not produced within the country and import tariffs are low.

Export Opportunities

There are no significant opportunities available with the exception of the present limited canned specialty market.

Import Policies

The Government is promoting the expansion and development of

HONDURAS

The Market

A small market exists for imported canned fish specialties such as herring and salmon which recorded \$150,000 of sales in 1977.

fishing industry in an attempt to increase production and improve internal and export marketing capabilities.

Honduras is basically self-sufficient in fresh and frozen fish and is an exporter of shrimp and lobster.

Export Opportunities

The expansion of local production plus the small import market offers little opportunity to expand Canadian exports significantly outside of the limited high-end canned specialty market.

Import Policies

The government carries out programs to support the domestic

JAMAICA

The Market

Fish imports are composed primarily of bulk frozen fish for local salting and drying purposes and prepared and preserved fish for direct retailing.

Imports of codfish totalled 1.8 million kilos of which 1.3 million kilos were from Canada. Of the 80,000 kilos of herrings imported, 40,000 kilos were supplied by Canada.

Jamaica — The Market (cont'd)

Competition was keen for the supply of sardines with Canada and Norway supplying equal amounts to the market in 1977. Alewives and mackerel, however, continued to be imported mainly from Canada. Other principal suppliers of fish products for the period were Japan, Poland and Norway.

Import Policies

Jamaica Nutrition Holdings Limited, a government statutory body took over all the importation of basic foods in November 1977.

This agency is now the sole importer of the following products: salt cod, mackerel, herring, sardines, pickled beef, chicken necks

and backs, skimmed milk, wheat and corn. The distribution of these imports will remain the responsibility of the trade.

Export Opportunities

Pickled and preserved fish continue to be one of the most important sources of low-cost protein in the Jamaican diet and due to this have been less affected than less essential items as far as import cutbacks are concerned.

The market, therefore, remains open to Canada with lowest prices being the over-riding criteria in the decision of where to place orders.

NICARAGUA

The Market

No market. Nicaragua is exporting fish products and is in the process of upgrading the fishing industry.

PANAMA

The Market

Canadian exporters shipped only small amounts of canned fish to Panama, totalling \$52,000 in 1977. Panamanian exports of shrimp earned \$33 million in 1976, making shrimp the country's third most important export product. By 1979, the enlarged fishing port

is expected to be completed, and this will generate an additional \$25 million per year from shrimp exports and \$20 million per year from packaged and refrigerated tuna and other marine products. Commercial opportunities for Canadian fish exports are not widespread.

PUERTO RICO

The Market

Total Canadian exports to the territory (includes Puerto Rico, Dominican Republic, Haiti, British and U.S. Virgin Islands)

reached \$19 million in 1977 and were \$9 million for the first four months of 1978. Salted fish accounts for more than 90 per cent of Canadian sales.

TRINIDAD AND TOBAGO

The Market

Canada continues to be the major supplier of fish and fish products to the Eastern Caribbean. Although there is competition from other countries, once supplies are available from Canada the territories within this Trade Post area will purchase considerable quantities of salted fish, smoked fish and canned sardines, as these products make up a large percentage of the staple diet of the population. In addition, there is a seasonal market at Lenten time for salt salmon and pickled mackerel among the large Catholic population in the area. In Barbados, Guyana, Surinam and Trinidad and Tobago, fishing plants have been set up mainly for processing shrimps. Plans in Guyana and in Trinidad and Tobago to process other fish are moving ahead. This is being done on a small scale. In Guyana, fish is being salted but with limited success. In the Leeward and Windward Islands, the governments are considering establishing cold storage facilities and fishing plants. In some cases, CIDA is providing assistance. The Caribbean Development Bank has undertaken some studies on fishing prospects.

Import Policies

The government of all the territories, having agreed to the setting up of the Caribbean Food Corporation, have indicated a determination to establish a viable fishing industry in the area. Several studies have been done over the years with assistance from FAO, CIDA and British aid. Guyana has banned imports of most fish and fish products and has announced the extension of the fishing zone to 200 miles.

Export Opportunities

The market for fish and fish products should continue to expand and Canadian companies can expect to obtain a good share of it, providing supplies are available and prices competitive. In Surinam, opportunities for the supply of alewives and bloaters through the government-controlled Central Import Services exist for Canadian producers of these products.

LATIN AMERICA

ARGENTINA

The Market

Argentina's fishing industry is rapidly becoming an important factor in the earning of foreign currency. In recent years, local catch has increased quickly and during 1977 reached a total close to 380,000 tonnes. Local per capita consumption is extremely low and the bulk of the catch is processed for export. The United States, Spain and Japan are the principal export markets. New facilities for the freezing of fish are being installed in various

ports. The principal specie caught is hake, which is mainly exported.

Import Policies

Duties on imports of fish and seafood which were 50 per cent have now been reduced to 15 per cent.

Export Opportunities

There is a small market for imported luxury fish and seafood products, such as salmon, lobster, shrimp and oysters.

CHILE

The Market

With its long coastline, Chile is an exporter of fish products, in spite of inefficient utilization of raw material and generally outdated technology and equipment.

The most important of the Chilean fish processing industries is fish reduction. Seventy per cent of the production of this industry is exported. The number of plants and installed capacity is greatly in excess of present and planned requirements. The least efficient industry is that of canning. In addition to being subject to an irregular supply and operating with obsolete equipment, only one-third of the installed capacity of this industry is now being used. Interest in market research, completely lacking in the past, is now becoming recognized as a necessity for the survival of the industry. It is also recognized that some of the quality raw material which at present is directed into fish reduction plants should be diverted toward a higher value product. The dry salt-smoked industry is the smallest of the sectors operating irregularly.

Import Policies

Historically, development of Chilean fisheries has had secondary priority in the Ministry of Agriculture. Recently, however, an

Under-Secretariat of Fisheries was created within the Ministry of Economy, giving a higher priority to this sector. While specific details have not yet been formulated, Chilean government policy is directed toward the development of port infrastructure; providing incentives to the private sector to develop the fisheries industry; encouragement of research; and assistance to the small independent fishermen in improving operations through the organization of co-operatives.

Import duties for fish products have been reduced which places increased pressure on government and private industry to improve productivity and marketing methods.

Export Opportunities

Because of the new accent put on its modernization, there will be some possibilities for selling processing equipment from refrigeration to canning. The approach most likely to succeed is the offer of consulting services that will include plant designing or rehabilitation, construction supervision, equipment procurement and personnel training. There is also a limited market with the carriage trade for Canadian Pacific salmon. Several brokers have already established buying connections.

COLOMBIA

The Market

Colombia is a major exporter of frozen shrimp (more than \$15 million in 1976) but imports canned fish, tuna, salmon, sardines, anchovies and caviar, primarily from Ecuador, Spain, Chile, Denmark, Argentina, South Africa and some from Canada and the United States.

Colombia is also a major importer of fish oils (\$8.7 million last year) from Iceland, United States, Norway and Peru. Dried or smoked fish is imported in limited quantities from Ecuador, and Colombia exports small quantities.

Import Policies

The fish products mentioned are all licence-free for importation. However, canned products require a health certificate from the Ministry of Public Health and the dried or smoked products require documents from the Ministry of Agriculture.

Duties on smoked or dried fish are 25 per cent; on canned fish (depending on species) between 45 per cent and 55 per cent.

While the canned goods are licence-free, imports must be registered and because such goods as canned salmon are considered luxuries, automatic registration is not guaranteed. Also the information requirements on foods concerning content, processing procedures, and company information have tended to function as strong non-tariff barriers, particularly on shipments following the initial importation.

Export Opportunities

Opportunities exist for canned salmon although the market is small. For other canned fish, producers should bear in mind that local preference is for highly spiced items and fish in bland oils is not in large demand.

ECUADOR

The Market

All fish products, fresh, frozen, dried, salted and canned are forbidden import into Ecuador. Ecuador will produce about 216,000 tonnes of fish this year. In terms of commercial value,

tuna, sardines, white fish, shrimp, and langostinos are the major products. Ecuador exports frozen fish to the United States, Japan, West Germany and Canada, and canned fish to several Latin American countries, including substantial amounts to Colombia.

MEXICO

The Market

To date the Mexican fisheries industry has made a limited contribution to the economic expansion of the country. Shrimp still constitutes Mexico's major income earner, representing 85 per cent of total exports followed by abalone, lobster and fish fillets. On the other hand, Mexican imports of fish products have remained at the level of \$20 million a year for the last five years. Of the imports, 80 per cent are fishmeal; 11 per cent fish, shellfish and cured fish; 5 per cent oils from marine animals; and 3 per cent different cured species. Other imports include pearls, whale-oil and sperm. With a population of 63 million and a coastline of 10,000 miles, expansion of the fisheries sector is receiving a new emphasis in Mexican Government development priorities.

Import Policies

In 1977 Mexico introduced its new fisheries program which has the goal of increasing production from 562,000 metric tons in 1977 to 2.4 million tons in 1982; thus placing the industry among the main sources of income, jobs and economic activity by 1982.

In conjunction with the national fisheries program, the Mexican Government announced its national program for ship construction. Under this program, Mexico expects to acquire sufficient vessels to attain its production goal of 2.4 million metric tons by 1982.

Mexico currently has four fleets: shrimpers, tuna clippers, sardine-anchovy vessels and trawlers. In general terms, however, the existing national fishing fleet can be classified as antiquated. One of the incentives offered to reach the above targets includes incentives for imports of equipment and machinery under the present tariff structure.

Export Opportunities

Canadian exports to Mexico currently include smoked salmon, canned sardines with some possibilities for dry salt cod, and these opportunities are expected to continue.

The Mexican fisheries program should generate a great demand for all types of equipment including ships, processing plants, marine hardware, steering systems, refrigeration equipment, fishmeal plants, on board equipment and above all technology and consulting services. The overall program anticipates a minimum investment of \$1.4 billion. There is great interest in Canadian participation in joint ventures in fishing and processing operations, and in the manufacture of equipment under licence or through joint ventures. Several Canadian companies are actively pursuing such opportunities. A market booklet, "Mexico's Fisheries Industry Development Program 1977-1982", is available from the Commercial Division, Canadian Embassy, Mexico City.

PARAGUAY

The Market

The market for a population of 2.5 million is small. Main imports are canned fish from Argentina and Spain.

Import Policies

Imports are free. A local agent is necessary for sales.

Export Opportunities

There is a marginal market for canned Canadian salmon.

PERU

The Market

Peru is a major producer and important exporter of fresh, frozen and canned fish.

Import Policies

The importation of fish products is prohibited.

Export Opportunities

Nil.

URUGUAY

The Market

Uruguay's rapidly expanding fishing industry supplies practically all domestic requirements.

Import Policies

Nil.

Export Opportunities

Nil.

VENEZUELA

The Market

Fresh or frozen cod or salmon, smoke-cured salmon and canned salmon (40 per cent ad valorem) are the fish imported from Canada.

Most fresh fish imports are reserved to the Venezuelan Government. Canned fish are protected by very high duty rates

(300 per cent ad valorem). These duties can be waived to allow imports during short periods of scarcity.

There are indications that Venezuelan waters are depleted by overfishing. Should this cause more than a temporary shortage of catches the market would have to be opened eventually to fish imports.

REGIONAL OFFICES

IF YOU HAVE NOT PREVIOUSLY MARKETED ABROAD, CONTACT THE NEAREST REGIONAL OFFICE OF THE DEPARTMENT OF INDUSTRY, TRADE AND COMMERCE IN YOUR AREA.

NEWFOUNDLAND LABRADOR	Director P.O. Box 6148 127 Water Street (2nd floor) St. John's, Newfoundland A1C 5X8	Tel: (709) 737-5511 Telex: 016-4749
NOVA SCOTIA	Director Suite 1124, Duke Tower 5251 Duke Street, Scotia Square Halifax, Nova Scotia B3J 1N9	Tel: (902) 426-7540 Telex: 019-21829
NEW BRUNSWICK	Director Suite 642, 440 King Street Fredericton, New Brunswick E3B 5H8	Tel: (506) 452-3190 Telex: 014-46140
PRINCE EDWARD ISLAND	Director P.O. Box 2289 Dominion Building 97 Queen Street Charlottetown Prince Edward Island C1A 8C1	Tel: (902) 892-1211 Telex: 014-44129
QUEBEC	Le directeur C.P. 1270, Station B Suite 600 685, rue Cathcart Montréal (Québec) H3B 3K9	Tél: (514) 283-6254 Télex: 012-0280
ONTARIO	Le directeur Suite 620, 2, Place Québec Québec (Québec) G1R 2B5	Tél: (418) 694-4726 Télex: 051-3312
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SASKATCHEWAN	Director Room 980 2002 Victoria Avenue Regina, Saskatchewan S4P 0R7	Tel: (306) 569-5020 Telex: 071-2745
ALBERTA NORTHWEST TERRITORIES	Director 500 Macdonald Place 9939 Jasper Avenue Edmonton, Alberta T5J 2W8	Tel: (403) 425-6330 Telex: 037-2762
BRITISH COLUMBIA YUKON	Director P.O. Box 49178, Suite 2743 Bentall Centre, Tower III 595 Burrard Street Vancouver, British Columbia V7X 1K8	Tel: (604) 666-1434 Telex: 04-51191

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