# ANNEX TO THE **WORLDWIDE FISHERIES MARKETING STUDY:** PROSPECTS TO 1985

# UNITED KINGDOM

Government of Canada
Fisheries and Oceans
Industry, Trade and Commerce

Gouvernement du Canada
Pêches et Océans
Industrie et Commerce

Canada. Dept. of Fisheries and Oceans. Fisheries Economic Development & Marketing. Marketing Services Branch.

(This Report is one of a series of country and species annexes to the main study - entitled the Overview).


D R A F T

Annex to the
Worldwide Fisheries Market Study:
Prospects to 1985

# UNITED KINGDOM



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The views expressed in this Study, however, are ours alone and reflect the Canadian perception of worldwide markets.

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E.W.
July, 1979

## FOREWORD

As a consequence of global extension of fisheries jurisdictions, a radical shift has taken place in the pattern of worldwide fish supply and demand. This change is still going on and will continue for many years before an equilibrium situation is reached. However, in the midst of this re-adjustment, a new trade pattern is emerging -- some net exporting countries are now importing and vice versa. In the longer term, some countries will experience shortages of supply and others will have a surplus. Fortunately, Canada is amongst the latter group.

The implications for the marketing of Canadian fisheries products arising from the worldwide introduction of the 200-mile limit are extensive. With our vastly improved supply position relative to world demand, government and industry are understandably concerned about ensuring that the bright promise of increased market opportunities are real and can be fulfilled. One of the steps in this process is the publication of the Worldwide Fisheries Marketing Study which assesses the potential on a country and species basis.

Specifically, the purpose of the Study is to identify the short (1981) and longer-term (1985) market opportunities for selected traditional and non-traditional species in existing and prospective markets. In this initial phase, 14 country markets and 8 species groups are analysed. It should be noted that while the information contained in the Reports was up-to-date when collected during March-June 1979, some information may now be dated given the speed with which changes are occurring in the marketplace. In this same vein, the market projections to 1981 and 1985 should be viewed with caution given the present and still evolving re-alignment in the pattern of international fisheries trade, keeping in mind the variability of key factors such as foreign exchange rates, energy costs, bilateral fisheries arrangements and the recently concluded GATT-MTN agreements which have a direct effect on trade flows.

Notwithstanding, the findings contained in these Reports represent an important consolidation of knowledge regarding market potential and implications for improvements in our existing marketing and production practices.

Thus, the results of the Study should usefully serve as a basis for planning fisheries development and marketing activities by both government and industry in order to capitalize on the identified market opportunities.

This draft Report is published for discussion purposes and as such we invite your critical comments.

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July, 1979
Ottawa

# UNITED KINGDOM*

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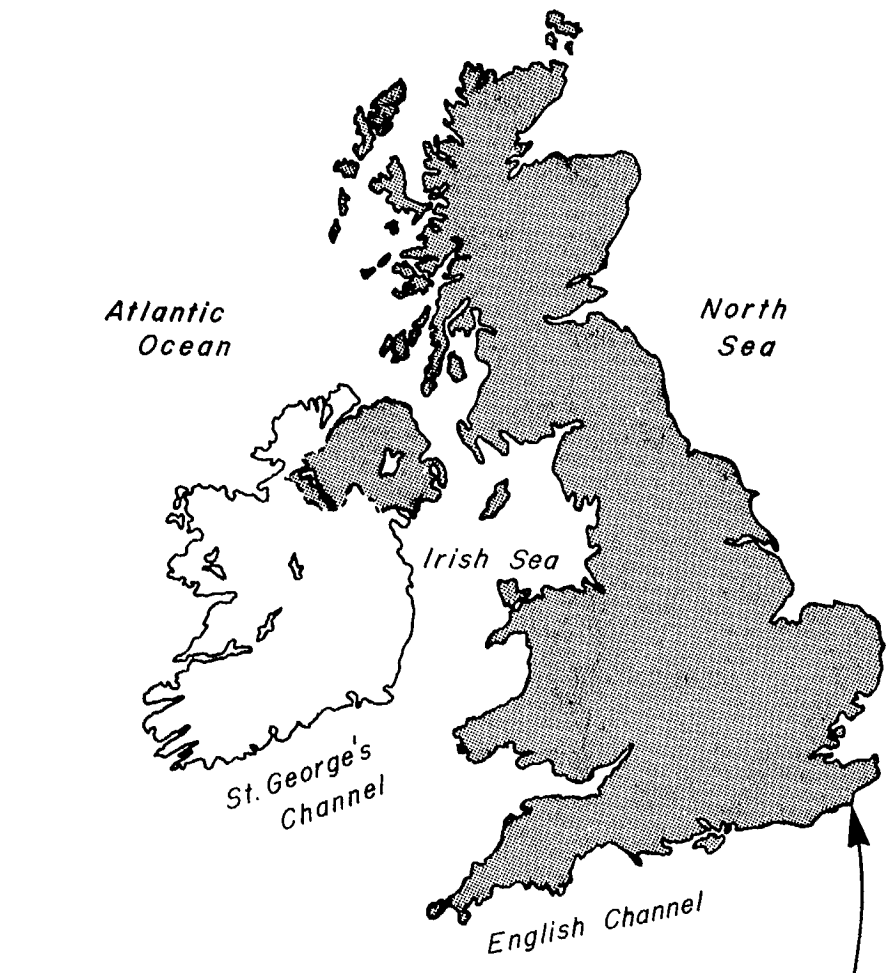
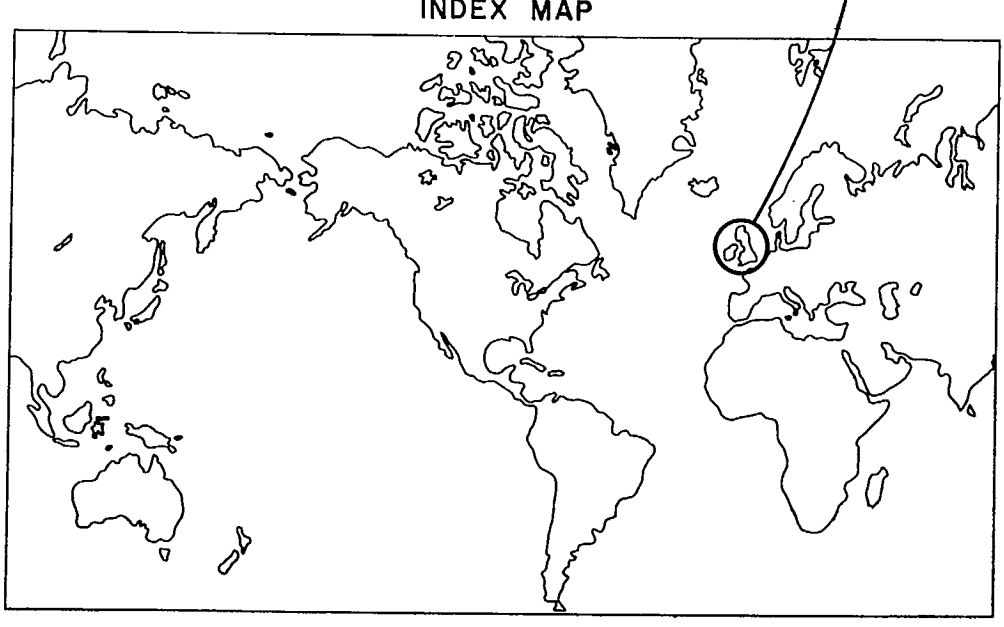
* For the purpose of this report, United Kingdom does not include Northern Ireland. "United Kingdom" and "Britain" are used interchangeably.

# UNITED KINGDOM




INDEX MAP



## A. DEMAND

### a.1 Per Capita Consumption of Fish

Per capita consumption of fish in the United Kingdom was an average 8.1 kg per capita during 1972-76 inclusively, a decline of nearly 8% from the 8.8 kg level during the 1960s. The decline occurred in fresh, frozen and cured products (see Table 1) while shellfish consumption increased and demand for canned products remained relatively constant.

A dramatic decrease in per capita consumption is apparent when household consumption is extracted from the total. There have been continual declines in fresh, processed and canned fish products, (see Table 2) offset somewhat by growing consumption of frozen fish products.

A recent study by the Economist Intelligence Unit identified three major reasons for the decline in consumption of fresh, processed and canned fish: poor image, inadequate distribution and the rapid rise in prices relative to other foods. As well, the decline in use of fresh fish has been attributed to the greater convenience of frozen fish products. The demand for canned products has been declining and has been harmed even more by the botulism scare involving salmon products in 1978.

Britain is a conservative market although changes in consumer tastes have occurred as a result of entry into

Table I: Human Consumption of Fish in United Kingdom (all sources)

(Kg per Capita per Annum)

| | 1960 | 1970 | 1972 | 1973 | 1974 | 1975 | 1976 | 1977* | 1981 | 1985 |
|---|---|---|---|---|---|---|---|---|---|---|
| Fresh, Frozen Cured | 7.3 | 7.3 | 6.4 | 6.2 | 6.4 | 6.1 | 6.5 | 5.7 | 6.3 | 6.3 |
| Canned | 1.2 | 1.0 | 1.4 | 1.3 | 1.0 | 1.2 | 1.2 | 1.2 | 1.0 | 1.1 |
| Shellfish | 0.3 | 0.5 | 0.5 | 0.7 | 0.6 | 0.6 | 0.7 | 0.5 | 0.6 | 0.6 |
| Total (Edible weight) | 8.8 | 8.8 | 8.3 | 8.2 | 8.0 | 7.9 | 8.4 | 7.4 | 7.9 | 8.0 |

* Because of unprecedented disruptions in supplies these figures do not fully reflect demand for fisheries products and were not used in the 1981-85 projections. Projections are based on historical trends and discussions with industry and government representatives.

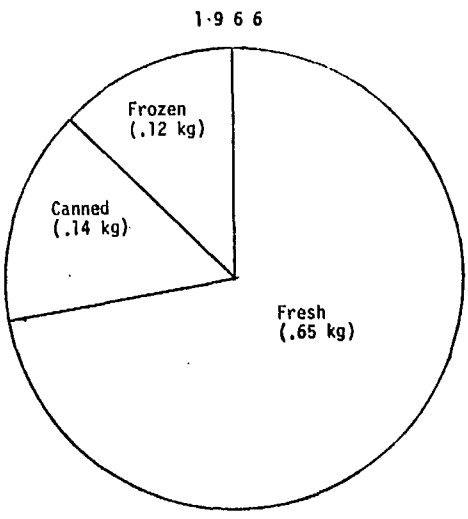
Source: Seafisheries Statistical Tables 1977: Table 12.

Table 2: Estimated Household Fish Consumption

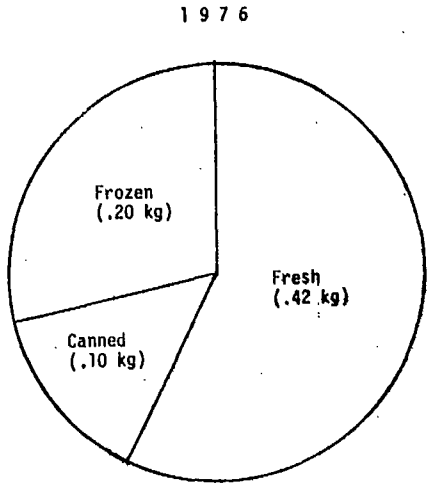
Kg per capita per week

| | 1966 | 1968 | 1970 | 1972 | 1974 | 1976 |
|---|---|---|---|---|---|---|
| Fish, fresh & processed | .65 | .62 | .57 | .52 | .43 | .42 |
| Fish, canned | .14 | .14 | .11 | .11 | .09 | .10 |
| Fish & Products, frozen | .12 | .13 | .15 | .16 | .16 | .20 |
| | .91 | .89 | .83 | .79 | .68 | .72 |

Source: National Food Survey, Ministry of Agriculture Fish and Food.




Total consumption: .91 kg
2.0 lb




.72 kg
1.6 lb

the EC. However, the U.K. fish market continues to be dominated by a few items which make up the bulk of sales. Industry leaders such as Findus, Birds Eye, Ross Group, Associated Fisheries and Marks and Spencer have developed new products including boil in the bag, double decker, fish in sauces and fish fingers produced from species other than cod. As in North America, new products attempt to cater to demands for convenience food brought on by increasing numbers of women entering the labour force.

Accordingly, frozen fish has increased rapidly in popularity in recent years, both for small retail packs and for large home freezer packs. This trend is consistent with the expanding market for all quick-frozen foods, a development encouraged by higher incomes and widespread purchases of refrigerators and home freezers (between 1972 and 1977 household ownership of freezers increased from 8% to 36%). Some predict frozen fish and fish products will be the major form of fish sold in the U.K. by 1985. Household consumption trends substantiate this view.

### a.2 Outlook: Consumption of Fish Products, 1981 and 1985

Total domestic seafood consumption in Britain during the 1981-1985 period depends not only on the per capita consumption of fish as outlined in the previous section but

also on the population size. Between 1971 and 1977, the population grew by 500,000 to 56.0 million. Most of the growth occurred before 1974. The population fell slightly in 1975 and 1976 as a result of falling birth rate and net emigration. Population projections suggest a continuing decline to 55.7 million in 1981 with a modest increase to 56.0 million in 1985, close to 1976-77 levels.

The foregoing projections of population growth and per capita consumption trends in the 1981-85 period can be drawn together to estimate the total market demand for fish and fish products in the U.K. As Table 3 shows the market in 1981 is expected to decline to 439,000 tonnes, down 2% from 1977. By 1985, however total market demand will have returned to the 1977 level.

Fish promotion by industry and government serves to expand consumer interest in,and understanding of, new products and species. The government agency, the White Fish Authority (WFA), promotes fish using media advertising, point of sale displays, educational services, recipes, cookery competitions and seminars with institutional caterers. The fishing industry pays a levy to the WFA for fish promotion. However the real value of the latter's work has been decreasing. Large fish processors promote frozen fish food packs -- not fresh fish -- and their advertising budgets outweigh the efforts of the WFA

Table 3: U.K. Domestic Consumption (Edible Weight)

| | 1977 | 1981 | 1985 |
|---|---|---|---|
| 1. Per Capita Consumption (KG per person per year) | 8.0 | 7.9 | 8.0 |
| 2. Population (Millions) | 56.0 | 55.7 | 56.0 |
| 3. U.K. Domestic Market (Thousand Metric Tons) | 448 | 439 | 447 |
| 4. Percentage Increase | | -2.0 | +1.9 |

to promote fresh fish. Some small companies have found point of sale advertising to be their most effective sales method.

Processors believe that advertising and promotion are essential to an increase in sales. If consumers understand the value of fish, they will pay a premium price. Fish can no longer be regarded as a mere substitute for meat or poultry. As consumers are more value-oriented than before, they are receptive to promotion of fish products on the grounds of value and quality.

## B. SUPPLY

### I. DOMESTIC

#### b.1 Self-sufficiency

The U.K. borders one of the world's richest fishing areas and consequently has been relatively self-sufficient in fisheries products. Historically cod has been the staple species, representing close to 30% of landings in many years (until recently) followed by herring and haddock. The British market still has a strong preference for these species.

The industry provides employment for over 20,000 fishermen and an estimated 100,000 more in processing, distribution, marketing, ship building and repair. Approximately 70% of landings by British vessels had been

traditionally caught in waters around the U.K., mostly by vessels under 80 feet in length. The backbone of the industry has been typically the family business or partnership unit of the fishing communities scattered around the entire coastline.

To complement this firm "home" base, the industry has traditionally fished the waters around Iceland and the Faroe Islands, the Barents and Norwegian Seas, and, to a lesser extent, along the coasts of Newfoundland, Labrador and Greenland. These more distant fishing grounds produced just over 30% of the total U.K. catch (over 60% of the cod) until in recent years coastal states imposed fishing limits.

b.2 Extended Jurisdiction

With the introduction of the 200 mile limit by countries such as Iceland (the Cod War), Norway, USSR, Faroe Islands and Canada, the U.K. fishing fleet has lost access to many of its traditional fishing grounds. The catch by the deep sea fleet, which accounted for 40% of the total U.K. catch in 1975, has fallen off substantially. The most dramatic change was in the reduction of distant water cod landings (due primarily to the closure of the Icelandic grounds) which fell from 197 million tonnes in 1976 to 130 million tonnes in 1977. Haddock landings

dropped from 44 million tonnes to 35 million tonnes over the same period.

The ban on the North Sea herring fishery meant that vessels which formerly caught herring had to find other species. Many switched to mackerel, as implementation of the 200 mile limit by the European Community meant that foreign fleets fishing mackerel were displaced by home fleets.

Britain's mackerel landings increased from 86 million tonnes in 1976 to 188 million tonnes in 1977 (see Table 4). Nevertheless, these catches have not been large enough to offset loss of access to traditional stocks.

### b.3 Present and Projected Domestic Landings

Until the European Community Common Fisheries Policy is settled and agreements on fishing access are made with third countries, the future of the U.K. fishing industry cannot be predicted with accuracy. The projected landings in Table 4 for 1981 and 1985 have been made using assumptions which could change radically as important issues are settled.

Traditionally, the largest landings by weight, have been cod, haddock, pollock and herring. But, with continued or increased pressure on these species, other species such as mackerel will be exploited.

Table 4 LANDINGS BY BRITISH VESSELS

round weight (metric tons)

FRESH AND FROZEN FISH

| | 1975 | 1976 | 1977 | 1981 | 1985 |
|---|---|---|---|---|---|
| Cod | 241,523 | 211,119 | 146,729 | 180,000 | 200,000 |
| Haddock | 112,488 | 127,464 | 123,201 | 130,000 | 150,000 |
| Plaice | 27,844 | 31,747 | 35,555 | 30,000 | 30,000 |
| Herring | 107,172 | 85,282 | 40,064 | 40,000 | 85,000 |
| Whiting | 43,902 | 46,139 | 47,330 | 50,000 | 55,000 |
| Saithe | 34,511 | 40,375 | 35,212 | 35,000 | 35,000 |
| Mackerel | 48,360 | 86,002 | 188,757 | 185,000 | 185,000 |
| Sprats | 58,720 | 89,740 | 97,075 | 90,000 | 90,000 |
| Dogfish | 16,654 | 16,639 | 17,136 | 17,000 | 17,000 |
| Lemon Sole | 4,248 | 4,386 | 4,795 | 4,000 | 4,000 |
| Monks | 4,220 | 4,907 | 4,690 | 5,000 | 5,000 |
| Sole | 1,164 | 1,280 | 1,213 | 1,000 | 1,000 |
| Skates and Rays | 6,699 | 6,764 | 6,851 | 7,000 | 7,000 |
| Redfish | 6,040 | 867 | 7,599 | 6,000 | 6,000 |
| Hake | 2,296 | 1,699 | 1,564 | 2,000 | 2,000 |
| Turbot | 631 | 763 | 809 | 1,000 | 1,000 |
| Ling | 3,093 | 3,417 | 3,892 | 4,000 | 4,000 |
| Norway Pout | 33,207 | 25,390 | 7,435 | 8,000 | 8,000 |
| Catfish | 3,916 | 3,088 | 2,970 | 3,000 | 3,000 |
| Halibut | 806 | 678 | 372 | 1,000 | 1,000 |
| Others | 34,484 | 45,092 | 59,549 | 60,000 | 60,000 |
| SUB-TOTAL | 791,976 | 838,428 | 832,798 | 859,000 | 949,000 |

Table 4 (continued)

round weight (metric tons)

SHELLFISH

| | 1975 | 1976 | 1977 | 1981 | 1985 |
|---|---|---|---|---|---|
| Dublin Bay Prawns | 9,376 | 12,639 | 11,888 | 11,000 | 11,000 |
| Lobster | 847 | 876 | 934 | 1,000 | 1,000 |
| Crab | 6,585 | 7,710 | 8,626 | 8,000 | 8,000 |
| Scallops | 7,564 | 9,986 | 11,801 | 10,000 | 10,000 |
| Cockles | 16,388 | 18,524 | 17,416 | 17,000 | 17,000 |
| Crawfish | 56 | 105 | 43 | - | - |
| Welks | 3,149 | 3,229 | 2,777 | 3,000 | 3,000 |
| Mussels | 6,917 | 7,450 | 11,389 | 8,000 | 8,000 |
| Shrimps | 2,070 | 3,264 | 2,718 | 3,000 | 3,000 |
| Others | 10,446 | 14,014 | 6,592 | 11,000 | 11,000 |
| SUB-TOTAL | 63,398 | 77,797 | 73,924 | 72,000 | 72,000 |
| TOTAL | 855,374 | 916,225 | 906,722 | 921,000 | 956,000 |

NOTE: The 1975,1976 and 1977 figures are recorded landings published by the White Fish Authority. However, the W.F.A., MAFF and the Herring Board have not attempted to forecast future landings in the U:K. Hence, the projections for 1981 and 1985 are based on "educated guesses" from discussions with industry, government and other agencies and groups. In most cases where no radical fluctuations have been apparent in the last few years, the average of recent catch levels was used as the best estimate (rounded to nearest thousand).

TABLE 5

UNITED KINGDOM CATCH OF WHITEFISH

(EXCLUDING SHELLFISH AND LIVERS)

BY REGIONS OF CAPTURE

| Fishing Regions | 1976 Metric Tons | 1976 % of Total | 1977 Metric Tons | 1977 % of Total | Percentage Change in Catch |
|---|---|---|---|---|---|
| Barents Sea | 63,103 | 8.4 | 49,244 | 6.2 | -22.0 |
| Norway Coast | 24,730 | 3.3 | 30,320 | 3.8 | 22.6 |
| Bear Island and Spitzbergen | 16,680 | 2.2 | 23,785 | 3.0 | 42.6 |
| North West Atlantic | 391 | 0.1 | 3,806 | 0.5 | 873.4 |
| Iceland | 59,372 | 7.9 | - | - | |
| Faroe Islands | 29,524 | 3.9 | 19,378 | 2.4 | - 34.4 |
| West Coast of Scotland | 96,913 | 12.8 | 111,506 | 14.1 | 15.1 |
| North Sea | 370,549 | 49.1 | 380,382 | 48.0 | 2.7 |
| Irish Sea | 12,487 | 1.6 | 11,095 | 1.4 | - 11.1 |
| English Channel | 65,333 | 8.6 | 142,371 | 18.0 | 117.9 |
| Bristol Channel | 9,978 | 1.3 | 15,056 | 1.9 | 50.9 |
| Other Grounds | 5,730 | 0.8 | 5,426 | 0.7 | -5.3 |
| TOTAL | 754,790 | 100.0 | 792,369 | 100.0 | 5.0 |

(i) Cod:

There is a cod shortage due to the loss of access to Iceland's fishing grounds (which had accounted for a major share of U.K. landings). Cod stocks within the EC zone have been more productive in recent years and stricter conservation measures have recently been imposed to assure the maintenance of the stocks. Assuming no successful resolution to the Icelandic situation, landings could increase from the 1977 level of 146,000 tonnes to 180,000 and 200,000 tonnes in 1981 and 1985 respectively.

(ii) Haddock:

The U.K. landings of haddock primarily come from the North Sea. Due to industrial fishing by Norwegian and Danish pout fishermen, many immature groundfish such as haddock have been converted into fish meal. To help conserve these young fish, part of the North-Western North Sea has been closed to industrial fishing i.e., the pout box. However, the current shortages of haddock emphasize the need for the further conservation measures which the U.K. has recently announced. With proper management, it is predicted that haddock landings could increase to 150,000 tonnes by 1985,up from the 1977 level of 123,000 tonnes.

(iii) Hake:

Over the past two decades, the North Sea hake stock has fallen drastically. The breeding grounds for this fish are in the Bay of Biscay where conservation measures have to be focused; however, no early initiatives are expected. Projections are for the British landings to be about 2,000 tonnes.

(iv) Herring:

The herring stocks in the North-East Atlantic have been drastically over-exploited because of the catching efficiency of purse seiners. When the government imposed a complete ban on herring fishing in the North Sea, severe restrictions on all herring fisheries were seen as necessary for at least another five years and maybe for a decade. The present by-catch is about 30,000 tonnes and herring landings are predicted to be only slightly higher in 1981. The general feeling is that the current ban should not be lifted until after 1981 and even then moderate quotas should be strictly enforced to avert another stock collapse. Predicted catches in 1985 are for 85,000 tonnes, close to 1976 levels.

(v) Other Finfish:

In the past, large catches of mackerel have been made off South-West England by Soviet Bloc countries.

However, with the EC claim on the 200 mile limit, foreign vessels have been ruled out of the area. Domestic fleets are taking increased catches to make up for the reductions in cod and herring. Most of this catch is exported (Nigeria) rather than used domestically. There is some scientific argument over the size of the TAC recommended for this species. Some maintain that the British catch could be doubled without impairing stocks. Others propose a more conservative TAC around the present levels (185,000 tonnes) which is the predicted catch used in this report.

Pollock (saithe) stocks are being fully exploited because of the shortages of cod but proposed changes in mesh size will help to conserve this stock. Hence, the prediction is that catch levels will remain around 35,000 tonnes in the 1981-85 period.

(vi) Shellfish:

No radical fluctuations are anticipated in shellfish catches over the next half decade.

b.4 Domestic Landings by Region of Catch

The North Sea accounts for nearly 50% of landings (see Table 5).

The overall tonnages taken from the North Sea have remained stable from 1976 to 1977 mainly because the increased mackerel catch has offset the decline in herring landings; nevertheless most mackerel is exported. Icelandic waters which accounted for 8 percent of the U.K. catch in 1976 (and up to 20% in previous years) were completely eliminated in 1977 when Iceland ordered all British vessels out. While total landings showed a healthy increase of 5% from 1976 to 1977, there were significant changes in the species "mix" of the catch,as well as in where it was caught. In response to these changes, a fundamental restructuring of the fishing industry appears necessary.

b.5 Common Fisheries Policy of the European Community

U.K. membership in the EC has resulted in serious disagreements over the Common Fisheries Policy. Three major issues are:

(i) Allowances. Britain feels that its allowances are not large enough within the Community's common fishing area. U.K. demands include an increase to 60% of TAC in the EC common fishery by 1982, and permanent exclusive rights for its fishermen within a 12-mile limit with a minimum 50-miles preference. Britain argues its 31% allotment in 1978 failed to account for loss of third country waters.

(ii) Conservation. Both government and fishermen in the U.K. have emphasized the conversation of declining fish stocks for a number of years; however, other EC members have continued to over-fish. Unilateral action by the U.K. has prevented the decimation of some stock such as herring,but stocks in other EC waters are drastically overfished. EC conservation measures are based solely on a quota system which through inadequate policies is subject to "over-runs". Britain fears that Spanish entry into the EC would exacerbate the situation.

In the meantime, new conservation measures under unilateral U.K. action will come into effect this summer. Minimum whitefish mesh sizes and minimum whiting and scampi landing sizes are to be increased (see Appendix I). As Britain already faces action in the European Court for unilateral conservation measures introduced last autumn, the government will only impose the new measures if "it is clear that a satisfactory agreement cannot be reached by the Community".

(iii) Access to third country waters. Failure to reach accord on the Common Fisheries Policy has jeopardized access to third country waters. The U.K.

industry (particularly the fleet owners' associations) are interested in agreements with Canada and other countries for joint ventures; however, Britain's membership in the EC effectively blocks such negotiations. The EC - Canada framework agreement negotiated last year has not been ratified by the Community. Britain will only support the agreement if court action against its unilateral conservation initiatives is dropped.

## II. IMPORTS

### b.1 The Import - Export Balance

In 1977 Britain imported over 200,000 tonnes of fish products while exports were 167,000 tonnes (see Table 6). Thus in volume terms, total exports were 80% of imports, but, in value terms, only 50% of imports. In other words, the U.K. imports higher value species (cod, shellfish, herring) and higher value added products (canned salmon), while exporting lower value species (mackerel).

Imports of fishing products from the European Community amounted to 33% of total U.K. imports in terms of quantity and 25% in terms of value. Of EC suppliers, Denmark ranks first, followed by the Netherlands and Ireland. Outside the EC, Norway, Spain, the U.S.S.R., South Africa, Japan and Malaysia are prominent suppliers. Canada, a

Table 6 United Kingdom Trade in Fishery Products 1977

(Values in ECUA)

| | IMPORTS | | EXPORTS | |
|---|---|---|---|---|
| | Metric Tonnes | Value | Metric Tonnes | Value |
| Fish, fresh, chilled, frozen | 119,765 | 146,553 | 110,963 | 75,646 |
| Fish, salted, dried, smoked | 3,081 | 3,197 | 20,153 | 20,979 |
| Fish, prepared, preserved | 58,997 | 111,042 | 11,265 | 20,072 |
| Shellfish, fresh, salted, dry | 8,722 | 20,509 | 24,271 | 42,810 |
| Shellfish prepared, preserved | 10,993 | 37,936 | 821 | 2,754 |
| TOTAL | 201,558 | 319,237 | 167,473 | 162,261 |
| Canada, from/to | 11,539 | | 554 | |

Source: Fisheries & Oceans Canada, Marketing Services Branch.
Values are in thousands of European Units.

Table 8. IMPORT MARKET PROJECTIONS, 1981, 1985

(metric tons, product weight)

| | 1977 | | 1981 | | 1985 | |
|---|---|---|---|---|---|---|
| A. SALTWATER SPECIES | Total | Canada | Total | Canada | Total | Canada |
| 1. COD | | | | | | |
| 1.1 fresh, round or dressed | 15,972 | - | 10,000 | - | 10,000 | - |
| 1.2 fresh, fillets | 315 | - | nea | - | nea | - |
| 1.3 frozen, round or dressed | 10,217 | - | 10,000 | - | 10,000 | - |
| 1.4 frozen fillets | 21,408 | - | 25,000 | 6,000 | 30,000 | 10,000 |
| 1.5 frozen blocks | 13,562 | 7 | 15,000 | 5,000 | 20,000 | 8,000 |
| 1.6 cured, pickled, etc | 218 | - | nea | - | nea | - |
| 2. HADDOCK | | | | | | |
| 2.1 fresh, round or dressed | 1,060 | - | 1,000 | - | 1,000 | - |
| 2.3 frozen, round or dressed | 735 | - | nea | - | nea | - |
| 2.4 frozen fillets | 2,323 | 21 | 2,000 | nea | 2,000 | nea |
| 3. REDFISH | | | | | | |
| 3.1 fresh, round or dressed | 59 | - | nea | - | nea | - |
| 3.3 frozen, round or dressed | 195 | - | nea | - | nea | - |
| 3.4 frozen, fillets | 15 | - | nea | - | nea | - |
| 3.5 frozen blocks | | | | | | |
| 5. HALIBUT | | | | | | |
| 5.1 fresh, round or dressed | 584 | - | 600 | - | 600 | - |
| 5.3 frozen, round or dressed | 1,068 | 35 | 1,000 | nea | 1,000 | nea |
| 7. HAKE | | | | | | |
| 7.1 fresh, round or dressed | 50 | - | nea | - | nea | - |
| 7.3 frozen, round or dressed | 4,642 | 18 | 5,000 | - | 5,000 | - |
| 7.4 frozen fillets | 4,816 | - | 5,000 | - | 5,000 | - |
| 11. HERRING | | | | | | |
| 11.1 fresh, round or dressed | 963 | - | 1,000 | - | - | - |
| 11.3 frozen, round or dressed | 621 | 604 | 6,500 | 4,000 | - | - |
| 11.4 frozen, fillets | 1,600 | 1,470 | 6,000 | 4,000 | 3,000 | 2,000 |
| 11.6 cured, pickled, etc. | 1,007 | 797 | 1,200 | 1,000 | - | - |
| 11.8 fillet, dried salted or brine | - | 30 | - | - | - | - |
| 12. MACKEREL | | | | | | |
| 12.1 fresh, round or dressed | 621 | - | - | - | - | - |
| 12.3 frozen, round or dressed | 135 | - | nea | - | nea | - |
| 12.4 frozen fillets | 55 | - | nea | - | nea | - |
| 12.7 canned | 2,609 | - | 2,000 | - | 1,000 | - |

Table 8 IMPORT MARKET PROJECTIONS, 1981, 1985

(metric tons, product weight)

| | 1977 | | 1981 | | 1985 | |
|---|---|---|---|---|---|---|
| | Total | Canada | Total | Canada | Total | Canada |
| 13. SALMON | | | | | | |
| 13.3 frozen, round | 3,075 | 594 | 3,000 | 1,000 | 3,000 | 1,000 |
| 13.7 canned | 14,094 | 5,806 | 14,000 | 6,000 | 14,000 | 6,000 |
| 13.8 smoked | 3 | - | - | - | - | - |
| 14. OTHER FINFISH | | | | | | |
| 14.1 fresh, round or dressed | 20,582 | - | 21,000 | - | 21,000 | - |
| 14.2 fresh fillets | 368 | - | nea | - | nea | - |
| 14.3 frozen, round or dressed | 5,280 | | 5,000 | nea | 5,000 | nea |
| 14.4 frozen fillets | 4,507 | - | 5,000 | - | 5,000 | - |
| 14.6 cured, pickled etc. | 1,415 | | 1,500 | nea | 1,500 | nea |
| 14.7 canned | 40,605 | - | 35,000 | nea | 30,000 | nea |
| 14.8 frozen, fillets, bread/batter | 1,398 | - | 2,000 | | 2,000 | - |
| B. FRESHWATER SPECIES | | | | | | |
| 15. WHITEFISH | | | | | | |
| 15.4 frozen fillets | 5 | 5 | nea | nea | nea | nea |
| 20. OTHER FRESHWATER FISH | | | | | | |
| 20.1 fresh, round or dressed | 609 | 13 | 1,000 | nea | 1,000 | nea |
| 20.3 frozen, round | 1,417 | 60 | 1,500 | nea | 1,500 | nea |
| C. SHELLFISH | | | | | | |
| 21. SQUID | | | | | | |
| frozen round | 375 | - | 400 | - | 400 | - |
| dried | 44 | - | nea | - | nea | - |
| 22. LOBSTER (canned included in 26) | | | | | | |
| in shell, live | 85 | 29 | 100 | nea | 100 | nea |
| in shell, not live (frozen) | 119 | 111 | 200 | 200 | 300 | 300 |
| meat | 28 | 3 | nea | nea | nea | nea |
| 23. CRABS AND CRAYFISH | | | | | | |
| meat | 150 | - | 200 | - | 200 | - |
| canned | 522 | 130 | 500 | 100 | 500 | 100 |
| 25. SHRIMPS AND PRAWNS | | | | | | |
| raw, in shell<br>cooked, peeled deveined | 6,072 | 611 | 6,000 | 600 | 6,000 | 600 |
| 26. OTHER SHELLFISH | | | | | | |
| in shell<br>meat | 1,587 | 12 | 2,000 | nea | 2,000 | nea |

Table 8 IMPORT MARKET PROJECTIONS, 1981, 1985

(metric tons, product weight)

| | 1977 | | 1981 | | 1985 | |
|---|---|---|---|---|---|---|
| D. OTHER PRODUCTS | Total | Canada | Total | Canada | Total | Canada |
| 27. LIVER AND ROES | | | | | | |
| fresh and chilled | 118 | 15 | 100 | nea | 100 | nea |
| frozen | 1,005 | 733 | 1,000 | 700 | 1,000 | 700 |
| smoked | 269 | 9 | 300 | nea | 300 | nea |

Note: nea means no estimate attempted due to small supplies.

relatively small supplier, provided only 11,540 tonnes in 1977 -- approximately 6% of U.K. imports by volume.

(i) Cod: The major supplier is Norway, followed by Iceland, Spain, Denmark and the Netherlands. Cod is imported as fillets, skin on and skin off, blocks and laminated blocks.

(ii) Haddock: Small import requirements have been filled by Norway and Iceland primarily as fresh round and frozen fillets. Like cod, haddock is sold through fish friers and fishmongers - if landed fresh at British ports by other countries' vessels - or to processors.

(iii) Hake: Domestic supplies have fallen by almost a third in the last few years and more hake is being imported. Hake, a substitute for cod and haddock, is considered the cheapest whitefish and is used in many products such as fish fingers. The main sources of imports - in the form of frozen fillets,or headless and gutted over a kilo in size - are South Africa and Argentina. Complaints have been made about quality, particularly about the Argentinean product being rancid. Hake, once significantly lower priced compared to other species, is rising in value because of

increased demand in the U.S. Other countries short of cod and haddock, such as Spain and Germany, are also competing for hake as a replacement. According to the Food and Agriculture Organization of the United Nations, the South American hake stock is underutilized and could readily sustain increased catches. Consequently, a shortage of hake is not foreseen.

(iv) Herring: Britain is very short of herring and has been for the past year, owing to the closure of the North Sea herring fishery to all members of the EC. Severe over-fishing, particularly industrial fishing, had resulted in a depletion of the stock. Also, the Manx area on the west coast of Scotland was closed in early 1978 by the unilateral action of the U.K. government to conserve stocks. Canada is the main supplier of imported herring.

(v) Other Finfish:

Mackerel: Small quantities of canned mackerel have been imported but importers are losing ground to British fishermen. The majority of the mackerel is exported to Nigeria.

Salmon: It is Canada's leading fish export to

Britain. In 1977, Britain imported nearly $27 million worth of canned salmon, a significant increase over previous years. Large quantities of frozen salmon were also imported in 1977 (600 tonnes).

Redfish, Halibut: Redfish imports have been extremely small. While there is a specialized market for smoked halibut as a luxury item, Canada is priced out of the market.

(vi) Shellfish:

Lobster: The U.K. appears satisfied with present supplies of North American lobster. The canner size lobster is too small to meet the legal requirements of more than 12 oz. in weight.

Crab: U.K. importers are turning to new sources of supply such as Thailand which sells lower quality canned crabs at almost half the Canadian price.

Shrimp: Shrimp (prawns), the most popular shellfish in Europe, have been in short supply in Britain. Shrimps can be bought more cheaply from Greenland than from North America. Furthermore, the British market appears to be satisfactorily supplied by Malaysia, Thailand and more recently Pakistan.

## C. POTENTIAL

### c.1 Species and Product Prospects

In general, Canadian exports to Britain can be increased, largely because of domestic supply difficulties (see Table 7).

(i) Cod: Cod remains the most popular species for consumers. There is a large demand for imported cod to make up the shortfall, owing to the loss of distant water fishing grounds and uncertain future domestic supply sources.

Processors, accustomed to high quality frozen-at-sea cod, continue to require such supplies.

To date, Canadian companies have not been successful in supplying to the U.K. market (see Table 7). One of the most important deterrents is the quality of Canadian cod (bones, flesh cuts, high plate count). Price is another import barrier. Canadian cod is subject to a 9% tariff (prior to July 1978 this was 15%) and the Canadian price must absorb transportation and duty costs to be competitive. In addition, currency exchange rates play an important role; the fall of the Canadian dollar vis a vis competitor countries in the past two years has been a boon to Canadian exporters.

There is a strong demand for cod roe, apparently in permanent shortage, though the market is small. Cod roe is popular fried in batter in fish and chip shops in the London area. Though their main supplies come from Scandinavia, processors are looking elsewhere for the product; processors also are anxious to obtain fresh roe for canning.

In future, Canada has major growth potential for cod exports mainly in frozen fillets and blocks. Principal competitors - Norway and Iceland - enjoy a 10-20% price premium for quality, an advantage which Canadian exporters must overcome. However, Norwegian and Icelandic cod catches are expected to decline somewhat over the next few years. At a competitive price, Canada could supply the market with 6,000-10,000 tonnes of frozen cod fillets and 5,000-8,000 tonnes of frozen cod blocks during 1981-85. The focus should be on U.K. processors such as Findus, Birds Eye, Ross, Brekkes and MacFisheries who process the primary products (such as fresh and frozen round or fillets and frozen blocks) into more sophisticated products. These processors have large distribution channels and market connections, making Canadian attempts to compete in the U.K. market expensive and

duplicative. The most realistic strategy for Canadian producers is to provide partially processed products to U.K. companies. However, there is some room for contracting with these U.K. firms to provide more sophisticated products under their labels.

(ii) Haddock: Ranked second in popularity to cod, haddock has been in short supply over the past two years. As a result of recently imposed conservation measures domestic stocks are likely to increase through 1985, possibly filling some of the shortfall on cod. Prices could be fairly strong . There could be some small potential for Canadian exporters in frozen round, or frozen fillets, but subject to the price, tariff and quality constraints which hold for cod.

(iii) Hake: No real market opportunities are seen for Canada.

(iv) Herring: U.K. processors require 160-170,000 tonnes to run at capacity for processing kippers and other smoked products. To meet the enormous shortfall, many processors have diversified and are using such fish as mackerel in their plants

whereas others have been importing herring from alternate sources. Herring imports must be semi-processed: whole round, butterfly flaps, single fillets; barrels of salted herring and pickled herring. Frozen herring milt is also an acceptable product among processors. The major potential for Canada lies in these areas.

Processors are not interested in importing any fully processed herring products from Canada such as kippers or marinated herring products. U.K. tariffs protect the domestic industry with duties of 10-12% on processed products but nil on primary herring.

In summary, the demand for Canadian herring particularly in the long-run cannot be predicted with accuracy. Too many variables are involved, such as when the herring stocks will return, the content of the Common Fisheries Policy, future regulations on renewed herring fishery, demand for herring substitutes and herring prices.

Consumption of herring has declined by an estimated 40-50% due to higher prices (now averaging £1/lb). This price trend may move herring into luxury markets away from the middle class, so-called "cheap food"

category. High prices also turn consumers to other products from which they may not be won back. However, in the short term (to 1981) there will be a fairly significant demand for herring. Demand could hold up over the longer term (to 1985) if North Sea stocks are not managed properly when the fishery is re-opened. A contentious issue is the quality of herring from Canada. Importers complain that fillets are damaged and incomplete. Quality must be upgraded to maintain prices and volume sales.

(v) Salmon: Frozen salmon enters duty free but in the future a duty may be imposed. Even free of duty the price of Canadian frozen salmon is considered too high, although Pacific Coast prices are cheaper than those on the East Coast. Canadian frozen salmon is regarded as superior to that from the U.S. Several large smoked salmon producers including S. Paron Ltd., Goodfare and Young Seafoods, show increasing interest in supplies of smoked salmon both now and in the near future. U.K. smoked salmon is sold to caterers and retailers as well as for export. The export trade is growing due to promotional activities;

major re-export markets include the Far East, Middle East, Europe, South Africa, Australia and the U.S. While British markets have not shown price sensitivity to date, further price increases generated by Japanese demand this year could depress import requirements for smoking and canned products.

The major salmon canners in the U.K. are John West (a Unilever subsidiary), Princes and Derisfords. Japan once dominated the market - accounting for 80% of the U.K. demand - but now most supplies come from North America. Japan is expected to become a major importer in future, competing with the U.K. for U.S. and Canadian salmon. The retail price difference between red and pink salmon is significant, red commands a 35% price premium over pink. Red salmon is served straight out of the tin for salads, while pink salmon is often served in sauce or other preparation.

The long-term outlook for Canadian canned salmon is basically unchanged from current levels as the market is still recovering from the botulism scare of August, 1978.

(vi) Other Finfish: Small markets exist for grey sole and lemon sole. Silver eels, canned pilchards and sardines are potential growth markets.

(vii) Shellfish:

Lobster: Sales of Canadian live lobster are good in winter when local supplies are not available but there is a preference for U.K. lobster. As a luxury food lobster will always have a specialized market which is likely to grow slowly unless British disposable incomes rise faster than expected. In fact, the majority of British production is shipped to the Continent, particularly France, where prices are higher than those in Britian. A tiny market exists for canned lobster meat and lobster spread .

Crab: Demand for Canadian Atlantic Queen crab is dampened by high Canadian prices. Some small potential is likely for Canadian snow carb. However, U.S. demand has pushed up prices to a level which U.K. buyers feel is too high and consequently demand has been dampened.

Shrimps: The potential is strictly by quality

and price barriers. In many cases, quality is not up to standard because the shrimps have not been processed quickly enough. In addition basic Canadian prices, together with high import duties and freight rates, make the Canadian shrimp expensive.

c.2 Trade Practices

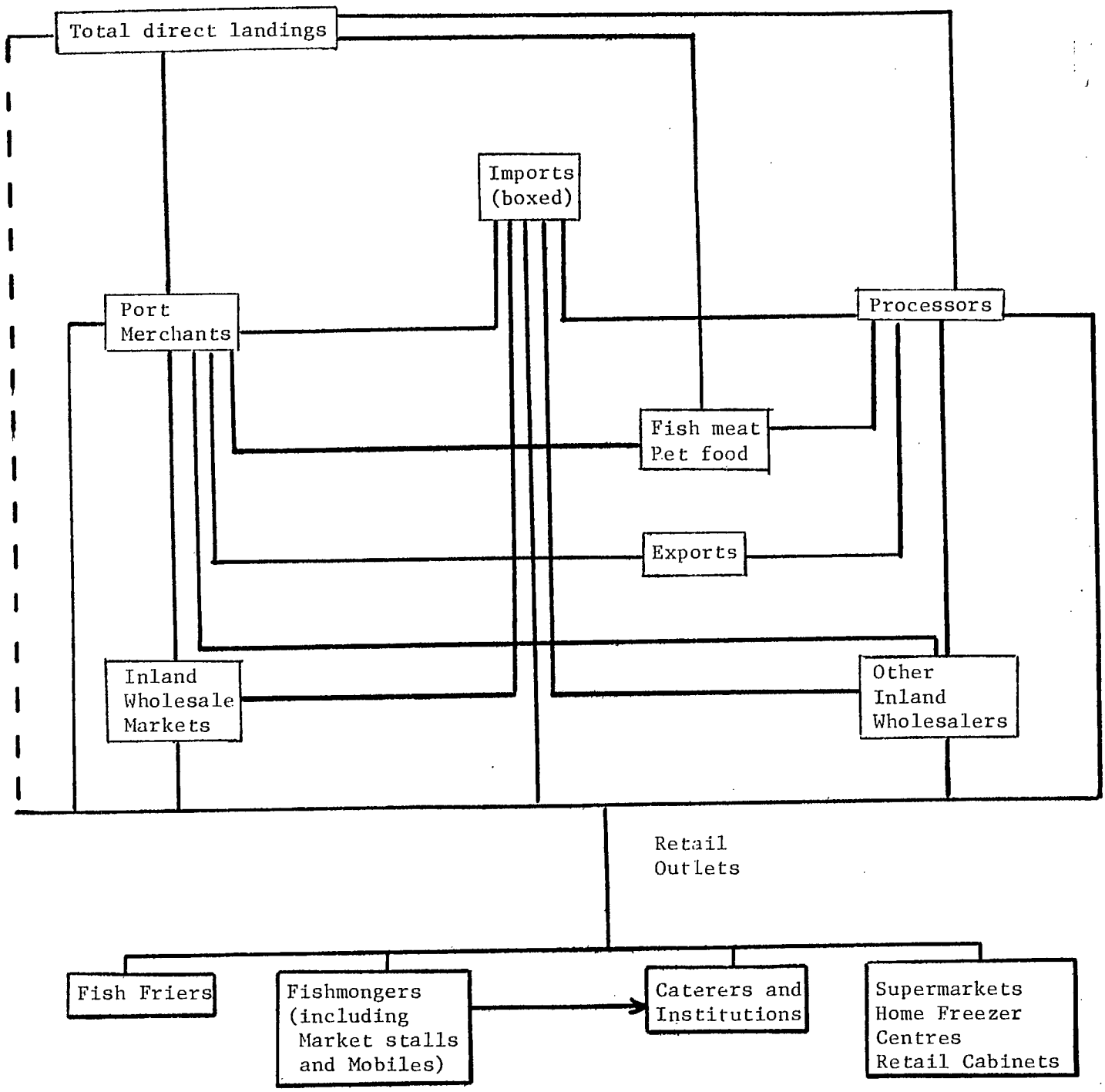
Distribution

The majority of fresh whitefish is landed at the principal ports of Hull, Grimsby, Fleetwood, Aberdeen and more recently, Peterhead. Almost all fresh fish is sold by auction at the ports to a port merchant who then sells to retailers, fishmongers, fish friers and inland merchants or inland wholesalers (Figure 3). The majority of fish is transported by road to the retailers or to large inland wholesale markets such as Billingsgate.

Frozen fish usually is bought on contract by processors for their own use. And it is the processor and frozen food wholesaler who will provide strong future demand for Canadian fish products. Packaged frozen fish products, either branded or unbranded, are distributed directly from processors, or through general frozen food wholesalers, to supermarkets and home freezer centres. Frozen fish, sold in bulk to fish friers, caterers and

FIGURE 2

DISTRIBUTION NETWORK FOR FISH




———Normal supply routes for fresh fish
------Less usual supply route for fresh fish

SOURCE: Price Commission

institutions, is distributed directly either from processors and port merchants or via inland wholesalers. More and more fish friers and fishmongers are buying directly from the inland wholesalers rather than from the port merchant.

Billingsgate, the most important British fresh fish market, sells increasing quantities of frozen fish. Frozen fish can be stored until the price is right; a 20% markup is made on sales to cover costs. Fish is brought to the market by coastal merchants who arrange transportation and quote a delivered price. At the market, wholesalers working on a 15% or less markup and sell to retailers who buy fresh fish at Billingsgate to supplement frozen fish supplies. In future, the fresh market is expected to contract further as rental costs at the relocated Billingsgate market will be more expensive. Though older merchants are adverse to dealing with frozen fish, more importers and distributors are emphasizing frozen products.

Fish friers (privately owned and operated fish and chip shops) represent an old British tradition and, more importantly, a market for Canadian fish. Though total numbers are declining - in the face of competition from fast-food chains - those shops which remain are growing in size. Fish friers in the U.K. use an estimated 1600 tonnes of filleted fish per week -- mainly cod followed by haddock and plaice. Other varieties account for only

6%. In future fish friers are likely to increase their dependence on frozen fish which now accounts for only 25-30% of supplies. Cod is the major frozen product, bought in individual and blocks of fillets. Portions vary from 2½ ozs. for snacks, to 5-6 ozs. for a main meal.

The fishmonger, a specialist shop selling seafood products, is another traditional fish outlet. Numbers have been dropping since World War II, but the decline has levelled out in the last two years to about 4,000 establishments.

Though fishmongers' suppliers are dominated by cod followed by haddock and plaice, a study by the Whitefish Authority shows that lesser known species are also being sold as consumers look to subsitutes for fish in short supply. For instance, herring products are being replaced by other smoked products, such as mackerel. Over 50% of the fish sold to fishmongers is already filleted to minimize high transportation costs, eliminate waste and overcome skilled labour shortages.

Fishmongers are buying increasing quantities of frozen fish to cope with consumer demand and reduced landings of fresh whitefish. However, frozen fish still represents only 9% of total fishmongers' purchases.

## D. PROBLEMS

### d.1 Prices

In general, demand for Canadian fish products depends on one major factor: price. A recent study found that price is "the single most important factor influencing the sales" of fish in the U.K. Many importers feel that Canadian prices of all types of fish and shellfish are too high and that Canadian producers are making excess profits.

The potential for the sale of Canadian fish in the U.K. is good, but Canadian producers have to compete by offering delivered prices -- including transportation and tariffs -- in line with other foreign suppliers of the same species. British demand for fish is affected by prices paid in other markets. For example richer members of the EC can afford to pay more and price some products out of the U.K. market. Thus, criticism of high Canadian prices may simply reflect the ability of consumers outside Britain to spend more on fish. This is especially true of high quality salmon (for smoking); shellfish and, to some extent herring.

Fish prices in the U.K. are becoming less dependent on U.S. prices, and are being linked instead to prices at EC ports. For example, the price of cod at Humberside is more likely to be influenced by the prices at Bremerhaven and

Boulogne than Boston. Among species, cod is the price-setter. When there is a shortage of cod, its price rises, substitutions are made and the cod shortfall is partly filled by cod imports. As a result a new equilibrium occurs between reduced consumption of cod and higher prices for cod and substituting species.

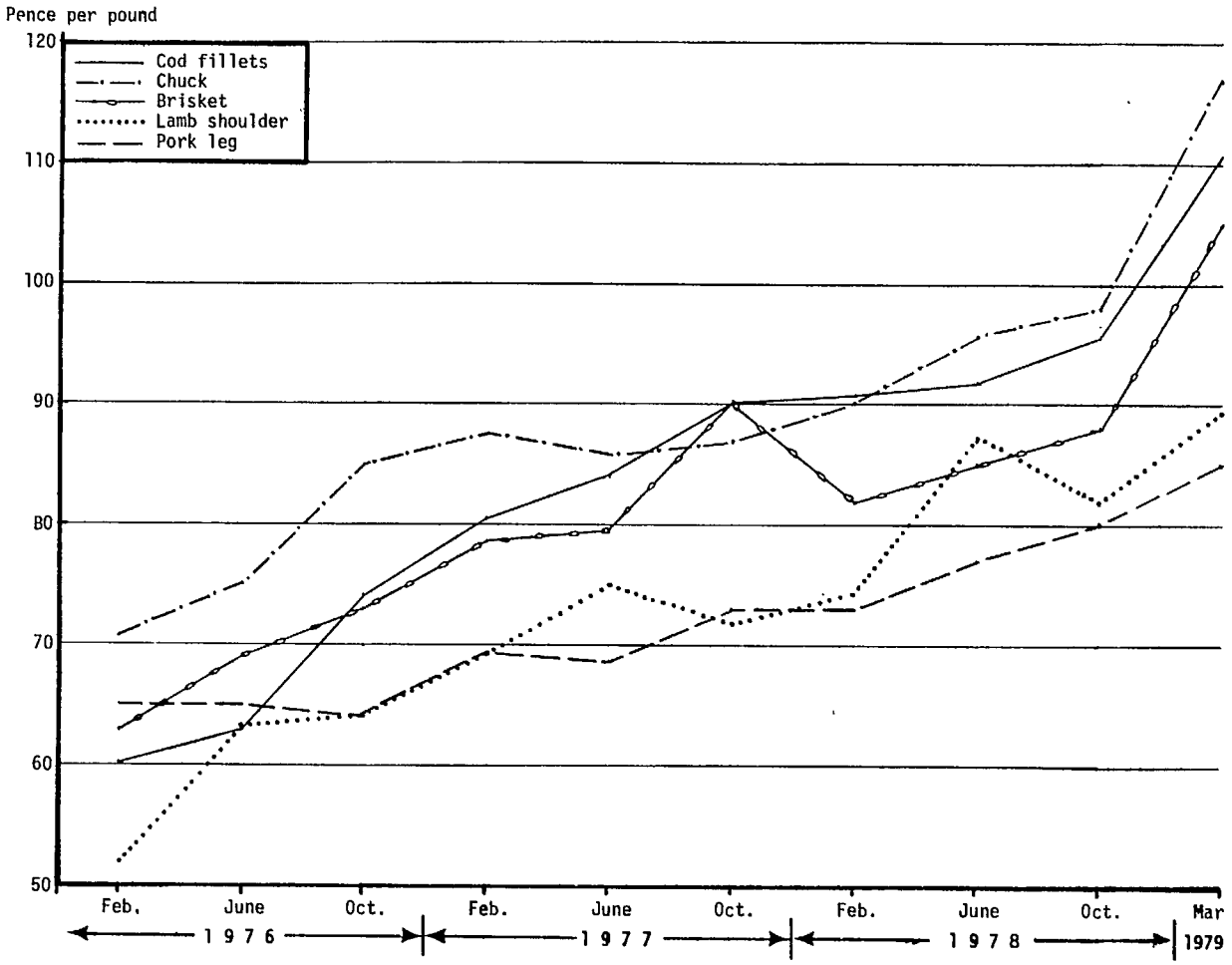
Recently, fish has begun to outpace increases in food prices generally (see Figure 3). Cod fillets are competing in the same price range as chuck steak. All fisheries product prices have increased faster than pork and broiler prices. As prices for fish rise, consumers turn to lower priced substitutes.

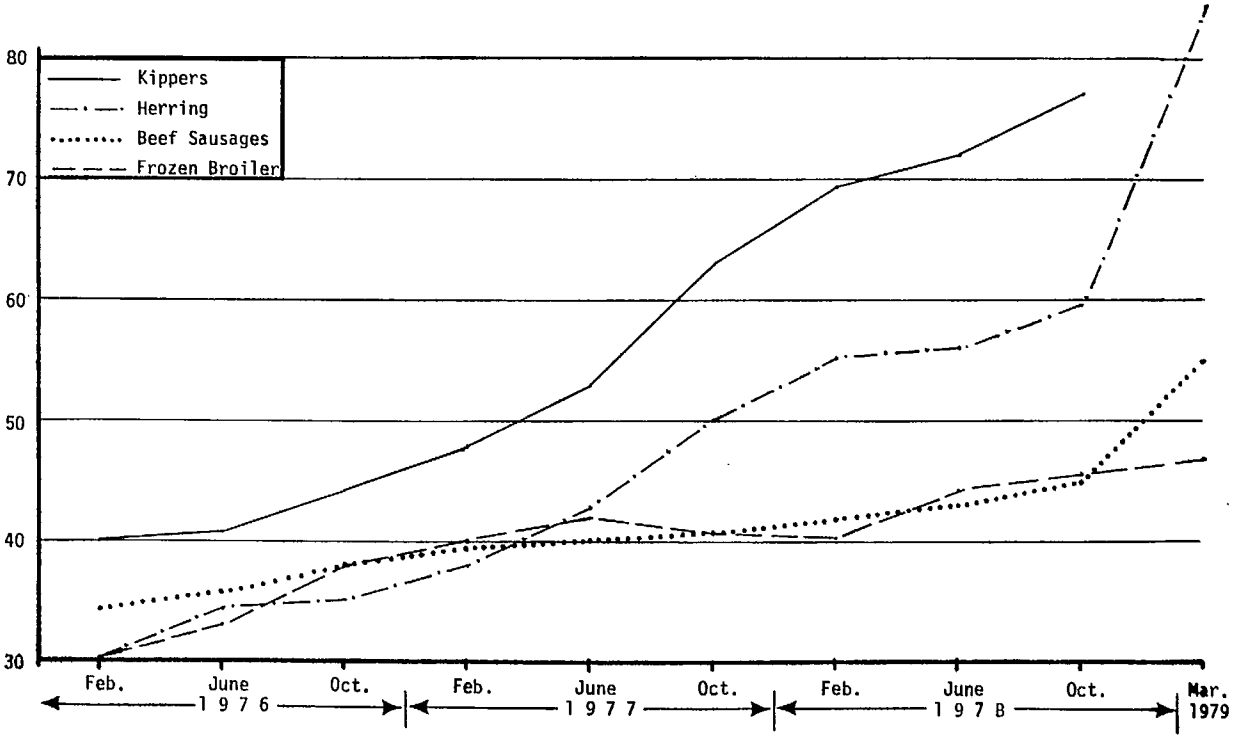
Consumer fish prices are about four times the price paid to the fishermen; the price which about doubles because of filleting, doubles again after distribution costs are taken into account.

d.2 Tariffs

High tariffs on Canadian fish are detrimental to demand, particularly as products from major competitors such as Iceland and Norway enter at lower rates (see Table 8). Under a temporary suspension due to expire in July, 1979, some duties have been reduced or eliminated. The temporary cuts have made Canadian fish more competitive; even so, the 9% rate on groundfish is still considered too high

AVERAGE RETAIL MEAT AND FISH PRICES IN THE UNITED KINGDOM*




Source: Whitefish Authority, Fish Retailer Purchase Study, October 1978.
1979 figures based on price checks in London.

Table 8 U.K. Tariffs Faced by Canada, Iceland, Norway on Cod and Herring

| | CANADA | | EFTA COUNTRIES | |
|---|---|---|---|---|
| | Full Tariff | Temporary Suspension | Iceland | Norway |
| Cod, frozen fillets | 15% | 9% | free | 3% |
| Cod, frozen blocks | 15% | 9% | free | 3% |
| Herring, frozen round | free | free | free | free |
| Herring, frozen fillets | free | free | free | free |
| Kippers | 10% | 10% | 10% | 10% |
| Herring, cured, pickled | 12% | 12% | 12% | 12% |

Note: European Free Trade Association countries operate in a free trade area with EC members. Each group allows the other preferential tariffs on certain commodities.

by importers.

Canada faces a significant competitive barrier in competing with EFTA countries, especially when full rates are reimposed. U.K. tariffs also protect processors against foreign value-added fish products. Canadian herring in the frozen round or filleted form enters the market free, but, further processed herring faces tariffs of 10% or more.

Changes in the relative values of the British Pound as the result of currency fluctuations has also been a factor in determining the market share of imports (see Table 9).

d.3 Quality

The U.K. fresh fish and processing industry demands products of consistent high quality. Consumers are accustomed to good quality when they purchase fresh or further processed fish products. Canada's chief competitors, Norway and Iceland, have recognized the quality required for the market and traditionally have produced fish products up to this standard. However, industry members have been critical of Canadian quality. The handling of herring, salmon, whitefish (mainly cod) and lobsters has attracted

Table 9 Relative Value of the United Kingdom Pound in January of 1976 through 1979

| Year | Norwegian Krone | Icelandic Krone | Canadian $ |
|---|---|---|---|
| 1976 | 11.1 | 302.63 | 2.0579 |
| 1977 | 8.80 | 256.32 | 1.7174 |
| 1978 | 9.96 | 382.61 | 2.1426 |
| 1979 | 10.10 | 619.12 | 2.4146 |

criticism. According to British processors, Canadian exporters do not know how to handle herring for human consumption, perhaps because herring has not been a major fish food for Canadians. As a result, damage and spoilage occur with broken and bruised fillets as a major problem. Canadian exporters will have to respond to these criticisms in any attempt to expand sales of herring in the U.K.

Salmon, a high priced item, is handled accordingly by British processors. However, they complain that Canadian frozen salmon, which of necessity must be of high quality for the smoking process, has bruises and broken flesh.

Complaints have also been made about cod being poorly filleted (bone in, flesh cuts, high plate count). A Torry reading - an industry measurement of quality - often ranks Norwegian fish 7-8 out of 10 while Canadian fish rates only 5-6. Live lobsters are damaged by the use of wood pegs in the claws; since prices are high, rubber bands are preferred to avoid damaging the claws. Recent U.K. concern about gafkemia in live lobster imported from Canada could lead to import restrictions if more thorough monitoring is not adopted. To alleviate quality complaints, exporters will have to produce fish

that is properly handled, processed and stored from harvest to market.

## E. CONCLUSION

Fish consumption has been decreasing over the long-run but has levelled off in recent years. Declining sales of fresh fish have been offset by an increase in demand for frozen fish products. Domestic supplies of cod and herring are expected to be in limited supply. Future supplies from traditional domestic sources will depend on the outcome of the Common Fisheries Policy of the EC. Regardless of the agreement, however, imports will take a larger share of the fish market.

Imports will be primarily of semi-processed fish such as frozen fillets and frozen blocks. The market control of large fish processors, industry over-capacity, and value-added tariff protection suggest that Canada will find it difficult to compete in the supply of more sophisticated products unless exporters make a packing arrangement with processors.

Even in supplying semi-processed fish, Canada has to overcome lower tariffs on cod from Norway and Iceland - Britain's major suppliers. Still Canada could be a significant, third-place supplier of cod. Demand will fluctuate

in response to available shipments from Norway and Iceland as well as in response to changing consumer preferences. Canada's ability to meet quality standards and buyer specifications will have to be upgraded.

The export outlook for herring is strong in the immediate future until the North Sea fishery is reopened in the early 1980's. After that, if domestic stocks are well managed and Britain wins a favourable settlement of the EC fisheries policy, Canada could face stiffer competition. Thus, in the longer run, the volume and price of imports from Canada are likely to decline.

Salmon, both canned and frozen, will continue to be in demand. Generally, the market for shellfish will be limited by higher prices paid by French consumers.

U.K. importers, wholesalers, processors and retailers - recognizing their supply problems - are receptive to increased participation in the market by Canada. The challenge is to ensure that Canada is able to reap the rewards of increased market share in Britain.

# APPENDICES

## APPENDIX 1

## BIRDSEYE PRICE LIST RETAIL

Effective January 8, 1979

| | lb/oz | Packs per case | Price per case £ |
|---|---|---|---|
| FISH ECONOMY PACK | | | |
| FISH | | | |
| *60 COD FISH FINGERS | | 6 | 18.42 |
| *36 COD FISH FINGERS | | 6 | 11.16 |
| 48 ECONOMY FISH FINGERS | | 6 | 13.08 |
| 24 FISH CAKES | | 6 | 8.22 |
| 16 Salmon Fish Cakes | | 6 | 8.40 |
| 16 Savory Fish Cakes | | 6 | 6.00 |
| *12 CRISPY COD STEAKS | | 6 | 15.78 |
| *16 Crispy Cod Portions | | 6 | 10.08 |
| *36 Crispy Cod Fingers | | 6 | 13.44 |
| *Crispy Cod Fries | 2 lb | 12 | 21.84 |
| *Crispy Plaice Bites | 1 lb 5 oz | 12 | 14.88 |
| *16 Cod Portions in Breadcrumbs | | 6 | 10.14 |
| *12 Hake Steaks in Breadcrumbs | | 6 | 10.20 |
| *COD IN SUACE (Butter, Parsley, Mushroom, Shrimp Flavour & Cheese ) | | 4 x 6 | 8.52 |
| | | 6 x 6 | 12.78 |
| *Cod Fillets | 1 3/4 lb | 6 | 10.56 |
| *Haddock Fillets | 1 3/4 lb | 6 | 11.34 |
| *Plaice Fillets | 1 3/4 lb | 6 | 10.38 |
| Breaded Plaice Fillets | 2 lb | 6 | 9.78 |
| *Battered Cod Fillets | 2 lb | 6 | 11.16 |
| *8 Cod Steaks | 1 3/4 lb | 6 | 11.34 |
| *Peeled Prawns | 1 lb | 6 | 16.44 |
| *Breaded Scampi | 1 lb | 6 | 14.22 |

BIRDSEYE PRICE LIST RETAIL

Effective January 8, 1979

| | lb/oz | Packs per unit | Price per unit | Suggested selling price per pack |
|---|---|---|---|---|
| | | | | p |
| FISH | | | | |
| * COD FISH FINGERS | 16 | 6 | 4.95 | 99 |
| * | 10 | 12 | 6.49 | 65 |
| * | 6 | 12 | 3.99 | 40 |
| * Economy Fish Fingers | 9 | 12 | 5.69 | 57 |
| | 5.4 | 12 | 3.49 | 35 |
| FISH CAKES | 10½ | 6 | 2.24 | 45 |
| | 7 | 6 | 1.59 | 32 |
| | 3½ | 12 | 1.78 | 18 |
| Salmon Fish Cakes | 3½ | 12 | 2.38 | 24 |
| Savoury Fish Cakes | 3½ | 12 | 1.78 | 18 |
| COD STEAKS IN BREADCRUMBS | 7 | 6 | 2.74 | 55 |
| * Haddock steaks in breadcrumbs | 7 | 6 | 2.84 | 57 |
| * Plaice Fillets in breadcrumbs | 7 | 6 | 2.59 | 52 |
| * COD IN BUTTER SAUCE | 6 | 12 | 4.46 | 45 |
| * Cod in Parsley Suace | 6 | 12 | 4.46 | 45 |
| * Cod in Mushroom Suace | 6 | 6 | 2.23 | 45 |
| * Cod in Shrimp Flavour Sauce | 6 | 6 | 2.23 | 45 |
| * Cod in Cheese Sauce | 6 | 6 | 2.23 | 45 |
| * CRISPY COD STEAKS | 7 | 6 | 2.73 | 55 |
| * Crispy Haddock Steaks | 7 | 6 | 2.83 | 55 |
| * 4 Crispy Cod Portions | 7 | 6 | 2.73 | 55 |
| * Crispy Cod Fingers | 9 | 6 | 3.09 | 62 |
| * | 4½ | 6 | 1.74 | 35 |
| * Crispy Cod Fries | 7 | 12 | 5.08 | 51 |
| Crispy Cod & Chips | 9 | 12 | 5.17 | 52 |
| * COD STEAKS | 14 | 6 | 5.65 | 1.13 |
| | 7 | 6 | 3.00 | 60 |

BIRDSEYE PRICE LIST RETAIL (continued)

Effective January 8, 1979

| | lb/oz | Packs per unit | Price per unit | Selected selling price per pack |
|---|---|---|---|---|
| | | | | p |
| * Haddock Steaks | 7 | 6 | 3.20 | 64 |
| * Hake Steaks | 7 | 6 | 2.40 | 48 |
| * Coley Steaks | 7 | 6 | 2.40 | 48 |
| * Cod Fillets | 10 | 6 | 4.15 | 83 |
| * Haddock Fillets | 10 | 6 | 4.40 | 88 |
| * Plaice Fillets | 10 | 6 | 4.00 | 80 |
| * Buttered Kipper Fillets | 10 | 12 | 8.43 | 85 |
| * | 6 | 12 | 5.35 | 54 |
| * Buttered Kippered Mackerel | 6 | 12 | 4.00 | 40 |
| * Buttered Smoked Haddock | 7 | 12 | 7.20 | 72 |
| * Peeled Prawns | 4 | 6 | 4.48 | |
| * Breaded Scampi | 7 | 6 | 6.82 | |
| * Prawn Cocktail | 4 | 6 | 3.39 | |

Note

This Chapter does not cover:

(a) Marine mammals (heading No. 01.06) or meat thereof (heading No. 02.04 or 02.06);

(b) Fish (including livers and roes thereof), crustaceans and molluscs, dead, unfit or unsuitable for human consumption by reason of either their species or their condition (Chapter 5); or

(c) Caviar or caviar substitutes (heading No. 16.04).

| *Tariff heading and Trade description* | *Special Provisions* | *Tariff Trade Code Number* | *Unit(s) of Quantity* | *Full Rate of Duty* | *CAP/ Addl. charge* |
|---|---|---|---|---|---|
| 03.01 FISH, FRESH (LIVE OR DEAD), CHILLED OR FROZEN: | | | | | |
| A. Freshwater fish: | | | | | |
| I. Trout and other salmonidae: | | | | | |
| a) Trout: | | | | 12% | — |
| Fresh or chilled | | 0301 0100 | kg | | |
| Frozen | | 0301 0200 | kg | | |
| b) Salmon: | S | | | 4% | — |
| Fresh or chilled | | 0301 0300 | kg | | |
| Frozen | | 0301 0400 | kg | | |
| c) Lake white fish | | 0301 0500 | kg | Free | — |
| d) Other | | 0301 0600 | kg | Free | — |
| II. Eels: | TQ | | | 5% | — |
| Fresh or chilled | | 0301 0700 | kg | | |
| Frozen | | 0301 0800 | kg | | |
| III. Carp: | | | | 8% | † |
| Fresh or chilled | | 0301 0900 | kg | | |
| Frozen | | 0301 1300 | kg | | |
| IV. Other: | | | | Free | — |
| Fresh or chilled— | | | | | |
| Live fish of a kind not normally used for human food | | 0301 1510 | kg | | |
| Other | | 0301 1590 | kg | | |
| Frozen | | 0301 1600 | kg | | |
| B. Saltwater fish: | | | | | |
| I. Whole, headless or in pieces: | | | | | |
| a) Herring: | | | | | |
| 1. From 15 February to 15 June: | | | | | |
| aa) Fresh or chilled | | 0301 2100 | kg | Free | — |
| bb) Frozen | | 0301 2300 | kg | Free | — |
| 2. From 16 June to 14 February: | | | | | |
| aa) Fresh or chilled | | 0301 2400 | kg | Free | † |
| bb) Frozen | | 0301 2500 | kg | Free | † |
| b) Sprats: | | | | | |
| 1. From 15 February to 15 June: | | | | Free | — |
| Fresh or chilled | | 0301 2600 | kg | | |
| Frozen | | 0301 2700 | kg | | |
| 2. From 16 June to 14 February: | | | | Free | — |
| Fresh or chilled | | 0301 2800 | kg | | |
| Frozen | | 0301 2900 | kg | | |

† Subject to compliance with the reference price. A countervailing duty is provided for in the case of non-compliance with the reference price.

S: See also Part 12C (Suspensions).

TQ See also Part 11.

| Tariff heading and Trade description | Special Provisions | Taric/Trade Code Number | Unit(s) of Quantity | Full Rate of Duty | CAP/ Additional charge |
|---|---|---|---|---|---|
| 03.01 B. I.—*continued* | | | | | |
| c) Tunny: | | | | | |
| 1. For the industrial manufacture of products falling within heading No. 16.04: | | | | | |
| aa) Whole: | | | | | |
| 11. Yellow-finned tunny: | | | | | |
| aaa) Weighing not more than 10 kg each | ¶¶ | 0301 3111 | kg | Free | † |
| bbb) Other | ¶¶ | 0301 3119 | kg | Free | † |
| 22. Long-finned tunny | ¶¶ | 0301 3130 | kg | Free | † |
| 33. Other | ¶¶ | 0301 3199 | kg | Free | † |
| bb) Gilled and gutted: | | | | | |
| 11. Yellow-finned tunny: | | | | | |
| aaa) Weighing not more than 10 kg each | ¶¶ | 0301 3311 | kg | Free | † |
| bbb) Other | ¶¶ | 0301 3319 | kg | Free | † |
| 22. Long-finned tunny | ¶¶ | 0301 3330 | kg | Free | † |
| 33. Other | ¶¶ | 0301 3339 | kg | Free | † |
| cc) Other (for example, "heads off"): | | | | | |
| 11. Yellow-finned tunny: | | | | | |
| aaa) Weighing not more than 10 kg each | ¶¶ | 0301 3351 | kg | Free | † |
| bbb) Other | ¶¶ | 0301 3359 | kg | Free | † |
| 22. Long-finned tunny | ¶¶ | 0301 3370 | kg | Free | † |
| 33. Other | ¶¶ | 0301 3390 | kg | Free | † |
| 2. Other: | | | | 22% | † |
| Fresh or chilled ... ... ... ... ... ... ... ... | | 0301 3400 | kg | | |
| Frozen ... ... ... ... ... ... ... ... ... ... | | 0301 3600 | kg | | |
| d) Sardines (Clupea pilchardus Walbaum): | | | | | |
| 1. Fresh or chilled | | 0301 3700 | kg | 23% | — |
| 2. Frozen | | 0301 3800 | kg | 23% | — |
| e) Sharks: | S | | | 8% | — |
| Fresh or chilled ... ... ... ... ... ... ... ... ... | | 0301 4100 | kg | | |
| Frozen ... ... ... ... ... ... ... ... ... ... ... | | 0301 4200 | kg | | |
| f) Redfish (Sebastes marinus): | | | | | |
| 1. Fresh or chilled | | 0301 4300 | kg | 8% | — |
| 2. Frozen: | | | | 8% | — |
| Whole ... ... ... ... ... ... ... ... ... ... ... | | 0301 4410 | kg | | — |
| Other ... ... ... ... ... ... ... ... ... ... ... | | 0301 4490 | kg | | |
| g) Halibut (Hippoglossus vulgaris, Hippoglossus reinhardtius): | S | | | 8% | — |
| Fresh or chilled ... ... ... ... ... ... ... ... ... | | 0301 4500 | kg | | |
| Frozen ... ... ... ... ... ... ... ... ... ... ... | | 0301 4700 | kg | | |
| h) Cod (Gadus morrhua or Gadus callarias): | | | | | |
| 1. Fresh or chilled | | 0301 4800 | kg | 15% | — |
| 2. Frozen: | | | | 15% | — |
| Whole ... ... ... ... ... ... ... ... ... ... ... | | 0301 4910 | kg | | |
| Other ... ... ... ... ... ... ... ... ... ... ... | | 0301 4990 | kg | | |

S: See also Part 12C (Suspensions).

¶¶ Goods entered under this subheading are subject to Customs end-use control—see Part 3A, paragraph 7 and Notice No. 770.

† Subject to compliance with the reference price. A countervailing duty is provided for in the case of non-compliance with the reference price.

| Tariff heading and Trade description | Special Provisions | Tariff Trade Code Number | Unit(s) of Quantity | Full Rate of Duty | CAP Addi chan |
|---|---|---|---|---|---|
| 03.01 B. I.—*continued* | | | | | |
| ij) Coalfish (Pollachius virens or Gadus virens): | | | | | |
| 1. Fresh or chilled | | 0301 5100 | kg | 15% | — |
| 2. Frozen: | | | | 15% | — |
| Whole | | 0301 5210 | kg | | |
| Other | | 0301 5290 | kg | | |
| k) Haddock: | | | | | |
| 1. Fresh or chilled | | 0301 5300 | kg | 15% | — |
| 2. Frozen: | | | | 15% | — |
| Whole | | 0301 5510 | kg | | |
| Other | | 0301 5590 | kg | | |
| l). Whiting (Merlangus merlangus): | | | | | |
| 1. Fresh or chilled | | 0301 5600 | kg | 15% | — |
| 2. Frozen | | 0301 5700 | kg | 15% | — |
| m) Mackerel: | | | | | |
| 1. From 15 February to 15 June: | | | | | |
| aa) Fresh or chilled | | 0301 5800 | kg | Free | — |
| bb) Frozen: | | | | Free | — |
| Whole | | 0301 5910 | kg | | |
| Other | | 0301 5990 | kg | | |
| 2. From 16 June to 14 February: | | | | | |
| aa) Fresh or chilled | | 0301 6100 | kg | 20% | — |
| bb) Frozen: | | | | 20% | — |
| Whole | | 0301 6310 | kg | | |
| Other | | 0301 6390 | kg | | |
| n) Anchovies (Engraulis spp): | | | | | |
| 1. Fresh or chilled | | 0301 6400 | kg | 15% | — |
| 2. Frozen | | 0301 6500 | kg | 15% | — |
| o) Plaice: | | | | | |
| 1. Fresh or chilled | | 0301 6600 | kg | 15% | — |
| 2. Frozen | | 0301 6700 | kg | 15% | — |
| p) Sea-bream of the species Dentex dentex and Pagellus: | | | | | |
| 1. Fresh or chilled | | 0301 6800 | kg | 15% | — |
| 2. Frozen | | 0301 6900 | kg | 15% | — |
| q) Other: | S | | | 15% | — |
| Sole— | | | | | |
| Fresh or chilled | | 0301 7100 | kg | | |
| Frozen | | 0301 7300 | kg | | |
| Other— | | | | | |
| Fresh or chilled— | | | | | |
| Live fish of a kind not normally used for human food | | 0301 7510 | kg | | |
| Hake | | 0301 7530 | kg | | |
| Other | | 0301 7599 | kg | | |
| Frozen— | | | | | |
| Hake— | | | | | |
| Whole | | 0301 7611 | kg | | |
| Other | | 0301 7619 | kg | | |
| Other | | 0301 7699 | kg | | |

S: See also Part 12C (Suspensions)

| Tariff heading and Trade description | Special Provisions | Tariff Item Code Number | Unit(s) of Quantity | Full Rate of Duty | CAP Additional charge |
|---|---|---|---|---|---|
| 03.01 B.—*continued* | | | | | |
| II. Fillets: | S | | | | |
| a) Fresh or chilled | | | | 18% | — |
| Of cod (Gadus morrhua or Gadus callarias) ... ... | | 0301 8100 | kg | | |
| Other ... ... ... ... ... ... ... ... ... ... ... ... | | 0301 8500 | kg | | |
| b) Frozen: | | | | | |
| 1. Of cod (Gadus morrhua or Gadus callarias): | | | | 15% | — |
| In packs put up for retail sale ... ... ... ... ... | | 0301 9110 | kg | | |
| In catering packs— | | | | | |
| Skin-on ... ..... ... ... ... ... ... ... | | 0301 9121 | kg | | |
| Skinless ... ... ... ... ... ... ... ... ... | | 0301 9123 | kg | | |
| In industrial blocks (without skin or bones) ... ... | | 0301 9130 | kg | | |
| 2. Of coalfish (Pollachius virens or Gadus virens): | | | | 15% | — |
| In packs put up for retail sale ... ... ... ... ... | | 0301 9210 | kg | | |
| Fillets not packed for retail sale ... ... ... ... | | 0301 9290 | kg | | |
| 3. Of haddock: | | | | 15% | — |
| In packs put up for retail sale ... ... ... ... ... | | 0301 9310 | kg | | |
| In catering packs— | | | | | |
| Skin-on ... ... ... ... ... ... ... | | 0301 9321 | kg | | |
| Skinless ... ... ... ... ... ... ... ... ... ... | | 0301 9323 | kg | | |
| In industrial blocks (without skin or bones) ... ... | | 0301 9330 | kg | | |
| 4. Of redfish (Sebastes marinus): | | | | 15% | — |
| In packs put up for retail sale ... ..... ... ... | | 0301 9410 | kg | | |
| Fillets not packed for retail sale ... ... ... ... | | 0301 9490 | kg | | |
| 5. Of tunny: | | | | 18% | — |
| In packs put up for retail sale ... ... ... ... ... | | 0301 9510 | kg | | |
| Fillets not packed for retail sale ... ... ... ... | | 0301 9590 | kg | | |
| 6. Of mackerel: | | | | 15% | — |
| In packs put up for retail sale— | | | | | |
| Sides ... ... ... ... ... ... ... ... ... ... | | 0301 9611 | kg | | |
| Other... ... ... ... ... ... ... ... ... ... | | 0301 9619 | kg | | |
| Not packed for retail sale— | | | | | |
| Sides ... ... ... ... ... ... ... ... ... ... | | 0301 9691 | kg | | |
| Other... ... ... ... ... ... ... ... ... ... | | 0301 9699 | kg | | |
| 7. Other: | S | | | 15% | — |
| Plaice ... ... ... ... ... ... ... ... ... ... | | 0301 9710 | kg | | |
| Hake ... ... ... ... ... ... ... ... ... ... | | 0301 9720 | kg | | |
| Other ... ... ... ... ... ... ... ... ... ... | | 0301 9799 | kg | | |
| C. Livers and roes: | S | | | 10% | — |
| Fresh or chilled ... ... ... ... ... ... ... ... ... ... | | 0301 9900 | kg | | |
| Frozen ... ... ... ... ... ... ... ... ... ... | | 0301 9950 | kg | | |
| 03.02 FISH, DRIED, SALTED OR IN BRINE; SMOKED FISH, WHETHER OR NOT COOKED BEFORE OR DURING THE SMOKING PROCESS: | | | | | |
| A. Dried, salted or in brine: | | | | | |
| I. Whole, headless or in pieces: | | | | | |
| a) Herring: | S | | | 12% | — |
| Salt (pickle) cured ... ... ... ... ... ... ... ... | | 0302 0110 | kg | | |
| Other ... ... ... ... ... ... ... ... ... ... ... | | 0302 0190 | kg | | |

S: See also Part 12C (Suspensions).

| Tariff heading and Trade description | Special Provisions | Tariff Trade Code Number | Unit(s) of Quantity | Full Rate of Duty | CAP Addl. charge |
|---|---|---|---|---|---|
| 03.02 A. I.—*continued* | | | | | |
| b) Cod: | | | | Free | — |
| Dried, unsalted | | 0302 0300 | kg | | |
| Dried, salted | | 0302 0500 | kg | | |
| Wet salted, or in brine | | 0302 0700 | kg | | |
| c) Anchovies (Engraulis spp) | S | 0302 1500 | kg | 10% | — |
| d) Common halibut (Hippoglossus vulgaris) | | 0302 1700 | kg | 15% | — |
| e) Salmon, salted or in brine | S | 0302 1800 | kg | 11% | — |
| f) Other | S | 0302 1900 | kg | 12% | — |
| II. Fillets: | | | | | |
| a) Of cod | | 0302 2100 | kg | Free | — |
| b) Of salmon, salted or in brine | | 0302 2500 | kg | 15% | — |
| c) Of lesser or Greenland halibut (Hippoglossus reinhardtius), salted or in brine | | 0302 2810 | kg | 15% | — |
| d) Other: | S | | | 16% | — |
| Herring— | | | | | |
| Salt (pickle) cured | | 0302 2820 | kg | | |
| Other | | 0302 2829 | kg | | |
| Other | | 0302 2899 | kg | | |
| B. Smoked, whether or not cooked before or during the smoking process: | | | | | |
| I. Herring: | | | | 10% | — |
| Kipper | | 0302 3110 | kg | | |
| Other | | 0302 3199 | kg | | |
| II. Salmon | | 0302 3300 | kg | 13% | — |
| III. Lesser or Greenland halibut (Hippoglossus reinhardtius) | | 0302 3910 | kg | 15% | — |
| IV. Common halibut (Hippoglossus vulgaris) | | 0302 3920 | kg | 16% | — |
| V. Other: | | | | 14% | — |
| Cod | | 0302 3991 | kg | | |
| Other | | 0302 3999 | kg | | |
| C. Livers and roes | S | 0302 6000 | kg | 11% | — |
| D. Fish meal | | 0302 7000 | kg | 13% | — |
| 03.03 CRUSTACEANS AND MOLLUSCS, WHETHER IN SHELL OR NOT, FRESH (LIVE OR DEAD), CHILLED, FROZEN, SALTED, IN BRINE OR DRIED; CRUSTACEANS, IN SHELL, SIMPLY BOILED IN WATER: | | | | | |
| A. Crustaceans: | | | | | |
| I. Crawfish of the genera "Palinurus", "Panulirus" and "Jasus" | S | 0303 1200 | kg | 25% | — |
| II. Lobsters (Homarus spp): | | | | | |
| a) Live | | 0303 2100 | kg | 10% | — |

S: See Part 12C (Suspensions).

| Tariff heading and Trade description | Special Provisions | Statistical Code Number | Unit of Quantity | Full Rate of Duty | CAP Additional charge |
|---|---|---|---|---|---|
| 03.03 A. II.—*continued* | | | | | |
| b) Other: | | | | | |
| 1. Whole | | 0303 2300 | kg | 13% | — |
| 2. Other | | 0303 2900 | kg | 20% | — |
| III. Crabs and freshwater crayfish | | 0303 4100 | kg | 15% | — |
| IV. Shrimps and prawns: | | | | | |
| a) Prawns (Pandalidae spp) | | 0303 4310 | kg | 12% | — |
| b) Shrimps of the genus "Crangon" spp: | | | | | |
| 1. Fresh, chilled or simply boiled in water | | 0303 4321 | kg | 18% | — |
| 2. Other | | 0303 4329 | kg | 18% | — |
| c) Other | | 0303 4390 | kg | 18% | — |
| V. Other (for example, Norway lobsters) | | 0303 5000 | kg | 12% | — |
| B. Molluscs: | | | | | |
| I. Oysters: | | | | | |
| a) European flat oysters weighing not more than 40 g each | | 0303 6100 | kg | Free | — |
| b) Other | S | 0303 6300 | kg | 18% | — |
| II. Mussels | | 0303 6500 | kg | 10% | — |
| III. Snails, other than sea snails | | 0303 6600 | kg | Free | — |
| IV. Other: | | | | | |
| a) Frozen: | | | | | |
| 1. Squid: | | | | | |
| aa) Ommastrephes sagittatus and Loligo spp | | 0303 6811 | kg | 6% | — |
| bb) Other | | 0303 6819 | kg | 8% | — |
| 2. Cuttle-fish of the species Sepia officinalis, Rossia macrosoma and Sepiola roodeleti | | 0303 6820 | kg | 8% | — |
| 3. Octopus | | 0303 6830 | kg | 8% | — |
| 4. Other: | | | | 8% | — |
| Cockles | | 0303 6841 | kg | | |
| Other | | 0303 6849 | kg | | |
| b) Other: | | | | | |
| 1. Squid (Ommastrephes sagittatus and Loligo spp) | | 0303 6860 | kg | 6% | — |
| 2. Other: | | | | 8% | — |
| Cockles | | 0303 6891 | kg | | |
| Other | | 0303 6899 | kg | | |

S: See also Part 12C (Suspensions).

| Tariff heading and Trade description | Special Provisions | Tariff/Trade Code Number | Unit(s) of Quantity | Full Rate of Duty | CAP/ Addtl. charge |
|---|---|---|---|---|---|
| 16.04 PREPARED OR PRESERVED FISH, INCLUDING CAVIAR AND CAVIAR SUBSTITUTES: | | | | | |
| A. Caviar and caviar substitutes: | | | | | |
| I. Caviar (sturgeon roe) | | 1604 1100 | kg | 30% | — |
| II. Other | S | 1604 1900 | kg | 30% | — |
| B. Salmonidae: | S | | | 7% | — |
| Salmon, canned | | 1604 3010 | kg | | |
| Other | | 1604 3099 | kg | | |
| C. Herring: | | | | | |
| I. Fillets, raw, coated with batter or breadcrumbs, deep frozen | | 1604 5100 | kg | 15% | — |
| II. Other | S | 1604 5900 | kg | 20% | — |
| D. Sardines | TQ | 1604 7100 | kg | 25% | — |
| E. Tunny | | 1604 7500 | kg | 24% | — |
| F. Bonito (*Sarda* spp), mackerel and anchovies: | | | | 25% | — |
| Bonito (Sarda spp) | | 1604 8200 | kg | | |
| Mackerel | | 1604 8300 | kg | | |
| Anchovies | | 1604 8500 | kg | | |
| G. Other: | | | | | |
| I. Fillets, raw, coated with batter or breadcrumbs, deep frozen | | 1604 9200 | kg | 15% | — |
| II. Other: | | | | 20% | — |
| Coalfish (Pollachius virens or Gadus virens) | | 1604 9400 | kg | | |
| Other— | | | | | |
| Pilchards | | 1604 9810 | kg | | |
| Brisling | | 1604 9820 | kg | | |
| Other | | 1604 9899 | kg | | |
| 16.05 CRUSTACEANS AND MOLLUSCS, PREPARED OR PRESERVED: | | | | | |
| A. Crabs | S | 1605 2000 | kg | 16% | — |
| B. Other: | S | | | 20% | — |
| Other crustaceans | | 1605 3000 | kg | | |
| Molluscs | | 1605 5000 | kg | | |

S: See also Part 12C (Suspensions).
TQ: See also Part 11.

| Tariff heading and Trade description | Special Provisions | Tariff/Trade Code Number | Unit(s) of Quantity | Full Rate of Duty | CAP/ Addtl. charge |
|---|---|---|---|---|---|
| 03.02 A. I.—*continued* | | | | | |
| b) Cod: | | | | Free | — |
| Dried, unsalted | | 0302 0300 | kg | | |
| Dried, salted | | 0302 0500 | kg | | |
| Wet salted, or in brine | | 0302 0700 | kg | | |
| c) Anchovies (*Engraulis* spp) | S | 0302 1500 | kg | 10% | — |
| d) Common halibut (*Hippoglossus vulgaris*) | | 0302 1700 | kg | 15% | — |
| e) Salmon, salted or in brine | S | 0302 1800 | kg | 11% | — |
| f) Other | S | 0302 1900 | kg | 12% | — |
| II. Fillets: | | | | | |
| a) Of cod | | 0302 2100 | kg | Free | — |
| b) Of salmon, salted or in brine | | 0302 2500 | kg | 15% | — |
| c) Of lesser or Greenland halibut (*Hippoglossus reinhardtius*), salted or in brine | | 0302 2810 | kg | 15% | — |
| d) Other: | S | | | 16% | — |
| Herring— | | | | | |
| Salt (pickle) cured | | 0302 2820 | kg | | |
| Other | | 0302 2829 | kg | | |
| Other | | 0302 2899 | kg | | |
| B. Smoked, whether or not cooked before or during the smoking process: | | | | | |
| I. Herring: | | | | 10% | — |
| Kipper | | 0302 3110 | kg | | |
| Other | | 0302 3199 | kg | | |
| II. Salmon | | 0302 3300 | kg | 13% | — |
| III. Lesser or Greenland halibut (*Hippoglossus reinhardtius*) | | 0302 3910 | kg | 15% | — |
| IV. Common halibut (*Hippoglossus vulgaris*) | | 0302 3920 | kg | 16% | — |
| V. Other: | | | | 14% | — |
| Cod | | 0302 3991 | kg | | |
| Other | | 0302 3999 | kg | | |
| C. Livers and roes | S | 0302 6000 | kg | 11% | — |
| D. Fish meal | | 0302 7000 | kg | 13% | — |
| 03.03 CRUSTACEANS AND MOLLUSCS, WHETHER IN SHELL OR NOT, FRESH (LIVE OR DEAD), CHILLED, FROZEN, SALTED, IN BRINE OR DRIED; CRUSTACEANS, IN SHELL, SIMPLY BOILED IN WATER: | | | | | |
| A. Crustaceans: | | | | | |
| I. Crayfish of the genera "Palinurus", "Panulirus" and "Jasus" | S | 0303 1200 | kg | 25% | — |
| II. Lobsters (*Homarus* spp): | | | | | |
| a) Live | | 0303 2100 | kg | 10% | — |

S: See Part 12C (Suspensions).

| Tariff heading and Trade description | Special Provisions | Tariff Trade Code Number | Unit(s) of Quantity | Full Rate of Duty | CAP Additional charge |
|---|---|---|---|---|---|
| 03.01 B.—*continued* | | | | | |
| II. Fillets: | S | | | | |
| a) Fresh or chilled | | | | 18% | — |
| Of cod (Gadus morrhua or Gadus callarias) ... ... | | 0301 8100 | kg | | |
| Other ... ... ... ... ... ... ... ... ... ... ... | | 0301 8500 | kg | | |
| b) Frozen: | | | | | |
| 1. Of cod (Gadus morrhua or Gadus callarias): | | | | 15% | — |
| In packs put up for retail sale ... ... ... ... ... | | 0301 9110 | kg | | |
| In catering packs— | | | | | |
| Skin-on ... ... ... ... ... ... ... ... | | 0301 9121 | kg | | |
| Skinless ... ... ... ... ... ... ... ... ... | | 0301 9123 | kg | | |
| In industrial blocks (without skin or bones) ... ... | | 0301 9130 | kg | | |
| 2. Of coalfish (Pollachius virens or Gadus virens): | | | | 15% | — |
| In packs put up for retail sale ... ... ... ... ... | | 0301 9210 | kg | | |
| Fillets not packed for retail sale ... ... ... ... | | 0301 9290 | kg | | |
| 3. Of haddock: | | | | 15% | — |
| In packs put up for retail sale ... ... ... ... ... | | 0301 9310 | kg | | |
| In catering packs— | | | | | |
| Skin-on ... ... ... ... ... ... ... | | 0301 9321 | kg | | |
| Skinless ... ... ... ... ... ... ... ... ... | | 0301 9323 | kg | | |
| In industrial blocks (without skin or bones) ... ... | | 0301 9330 | kg | | |
| 4. Of redfish (Sebastes marinus): | | | | 15% | — |
| In packs put up for retail sale ... ... ... ... | | 0301 9410 | kg | | |
| Fillets not packed for retail sale ... ... ... ... | | 0301 9490 | kg | | |
| 5. Of tunny: | | | | 18% | — |
| In packs put up for retail sale ... ... ... ... ... | | 0301 9510 | kg | | |
| Fillets not packed for retail sale ... ... ... ... | | 0301 9590 | kg | | |
| 6. Of mackerel: | | | | 15% | — |
| In packs put up for retail sale— | | | | | |
| Sides ... ... ... ... ... ... ... ... ... ... | | 0301 9611 | kg | | |
| Other... ... ... ... ... ... ... ... ... ... | | 0301 9619 | kg | | |
| Not packed for retail sale— | | | | | |
| Sides ... ... ... ... ... ... ... ... ... ... | | 0301 9691 | kg | | |
| Other... ... ... ... ... ... ... ... ... ... | | 0301 9699 | kg | | |
| 7. Other: | S | | | 15% | — |
| Plaice ... ... ... ... ... ... ... ... ... ... | | 0301 9710 | kg | | |
| Hake ... ... ... ... ... ... ... ... ... ... | | 0301 9720 | kg | | |
| Other ... ... ... ... ... ... ... ... ... ... | | 0301 9799 | kg | | |
| C. Livers and roes: | S | | | 10% | — |
| Fresh or chilled ... ... ... ... ... ... ... ... ... ... | | 0301 9800 | kg | | |
| Frozen ... ... ... ... ... ... ... ... ... ... ... | | 0301 9900 | kg | | |
| 03.02 FISH, DRIED, SALTED OR IN BRINE; SMOKED FISH, WHETHER OR NOT COOKED BEFORE OR DURING THE SMOKING PROCESS: | | | | | |
| A. Dried, salted or in brine: | | | | | |
| I. Whole, headless or in pieces: | | | | | |
| a) Herring: | S | | | 12% | — |
| Salt (pickle) cured ... ... ... ... ... ... ... ... | | 0302 0110 | kg | | |
| Other ... ... ... ... ... ... ... ... ... ... ... | | 0302 0190 | kg | | |

S: See also Part 12C (Suspensions).

This Part contains a list of goods subject to reductions and exemptions from import duty for a period up to and including 30 June 1979, or such other dates as are indicated in brackets against any item. These goods are subject to suspensions of the CCT.
Where no rates of duty are shown in the "Preferential" column, the rates shown in the "Full" column apply as appropriate. However, apart from these arrangements, reduced or nil rates of duty may also be claimed for certain goods under the Preferential rates shown in Part 10 or a Tariff Quota (Part 11).

To qualify for the Preferential Suspended Rates, goods must fulfil the requirements on origin and consignment set out in the appropriate Notice referred to in Part 10.
Abbreviations used in certain descriptions:—

"INN" denotes an international non-proprietary name approved by the World Health Organisation.

"ISO" denotes a name approved by the International Standards Organisation.

| *Tariff Heading/ Subheading* | *Description of goods* | *Rates of Duty* | |
|---|---|---|---|
| | | *Full Suspended Rate* | *Preferential Suspended Rates* |
| ex 03.01 A. I. b) | Salmon, fresh (live or dead), chilled or frozen (31.12.78) | Free | |
| ex 03.01 B. I. e) | Piked dogfish (Squalus acanthias), fresh, chilled or frozen, whole, headless or in pieces | Free | |
| ex 03.01 B. I. g) | Lesser or Greenland halibut (Hippoglossus reinhardtius), fresh, chilled or frozen, whole, headless or in pieces | Free | |
| ex 03.01 B. I. h) | ¶¶Cod (Gadus morrhua or Gadus callarias), fresh, chilled or frozen, whole, headless or in pieces, intended for the processing industry (31.12.78) | 10% | Turkey= 2% |
| ex 03.01 B. I. k) | ¶¶Haddock, fresh, chilled or frozen, whole, headless or in pieces, intended for the processing industry (31.12.78) | 10% | Turkey = 2% |
| ex 03.01 B. I. q) | ¶¶Hake, fresh, chilled or frozen, whole, headless or in pieces, intended for the processing industry (31.12.78) | 10% | Turkey = 2% |
| | ¶¶Flaps of sardinops sagax or ocellata (pilchards) fresh, chilled or frozen, of a length of 12 cm or more, intended for the processing industry | Free | |
| | ¶¶Sardinops sagax or ocellata ("pilchards"), fresh, chilled or frozen, whole, of a length of 20 cm or more, intended for the processing industry | 4% | Turkey = 0·8% |
| | ¶¶Sturgeons, fresh, chilled or frozen, whole, headless or in pieces, intended for the processing industry | Free | |
| ex 03.01 B. II. a) and B. II b) 7. | ¶¶Fillets of hake, fresh, chilled or frozen intended for the processing industry (31.12.78) | 10% | |
| | ¶¶Fillets of herring, fresh, chilled or frozen, intended for the processing industry (31.12.78) | Free | |
| ex 03.01 C. | Hard fish roes, fresh, chilled or frozen | Free | |
| ex 03.02 A. I. a) | ¶¶Herring, dried, salted or in brine, whole, headless or in pieces, intended for the processing industry (31.12.78) | Free | |
| ex 03.02 A. I. c) | Anchovies (Engraulis sp.p.), salted or in brine, whole, headless or in pieces, in packings of a net capacity of 8 kg or more | Free | |
| ex 03.02 A. I. c) | Salmon, salted or in brine, whole, headless or in pieces | 4% | Turkey = 1·6% |
| ex 03.02 A. I. f) | Sprats, salted or in brine, whole, headless or in pieces (31.12.78) | Free | |
| | ¶¶Coalfish (Pollachius virens or Gadus virens), salted or in brine, whole, headless or in pieces, intended for the processing industry | 7% | Turkey = 2·8% |

¶¶Goods entered under this subheading are subject to Customs end-use control—see Part 3A, paragraph 7 and Notice No. 770.

Import Duty Suspensions (Exemptions and Reductions) —*continued*

Other Temporary Suspensions—*continued*

| *Tariff Heading/ Subheading* | *Description of goods* | *Rates of Duty* | |
|---|---|---|---|
| | | *Full Suspended Rate* | *Preferential Suspended Rates* |
| ex 03.02 A. II: d) | Fillets of coalfish (Pollachius virens or Gadus virens), salted or in brine | 7% | Turkey = 2.8% |
| | ¶¶Fillets of herring, dried, salted or in brine, intended for the processing industry (31.12.78) | Free | |
| ex 03.02 C. | Hard fish roes, salted or in brine | Free | |
| ex 03.03 A. I. | Tails of crawfish, chilled or frozen, shelled or not | 10% | Spain = 5%. |
| ex 03.03 B. I. b) | Oysters, fresh (live), weighing not more than 12 g each | Free | |
| | Oysters, fresh (live) of the "Crassostrea gigas" variety weighing more than 100 g each | Free | |
| ex 16.04 A. II. | Hard fish roes, washed, cleaned of adherent organs and simply salted or in brine | Free | |
| ex 16.04 B. | ¶¶Salmon, intended for the processing industry for further manufacture into pastes or spreads (31.12.78) | Free | |
| ex 16.04 C. II. | ¶¶Herring flaps, prepared or preserved in vinegar, in packings of net capacity of 10 kg or more, intended for the processing industry (31.12.78) | Free | |
| | ¶¶Spiced and salted herrings, in packing of a net capacity of 10 kg or more, intended for the processing industry (31.12.78) | Free | |
| ex 16.05 A. | ¶¶Crabs of the "King", "Hanasaki", "Kegani" and "Queen" varieties, simply boiled in water and shelled, whether or not frozen, in packings of a net capacity of 2 kg or more, intended for the processing industry | Free | |
| | ¶¶Crabs, excluding the species "Cancer pegarus", simply boiled in water and shelled, whether or not frozen, in packings of a net capacity of 2 kg or more, for repacking for retail sale | 5% | Turkey = 2% |
| ex 16.05 B. | ¶¶Shrimps, and prawns other than those of the Crangon variety, boiled in water and shelled, whether or not frozen, or dried, intended for the industrial manufacture of products falling within heading No. 16.05 (31.12.78) | 10% | Turkey = 4%; Spain, Egypt = 5% |