ANNEX TO THE WORLDWIDE FISHERIES MARKETING STUDY: PROSPECTS TO 1985

IVORY COAST

Government of Canada Gouvernement du Canada
Fisheries and Oceans Pêches et Océans

(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 Marketing Study:
Prospects to 1985

IVORY COAST
CÔTE D'IVOIRE

Study Team

A. Arsenault
Pêcheurs Unis du Québec

J. Arsenault
Department of Industry,
Trade and Commerce

B. Dunbar
Department of Fisheries
and Oceans

R. Horne
Department of Industry
Trade and Commerce

J. Prévost
Canadian Embassy, Abidjan

Author submitted: May, 1980
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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. Wong
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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 a new dynamic 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 global potential on a country and species basis.

Specifically, the purpose of the Study is to identify the longer term market opportunities for selected traditional and non-traditional species in existing and prospective markets and to identify factors which may hinder or help Canadian fisheries trade in world markets. To date, over 40 country markets and 8 species groups have been analyzed. It should be noted that while the information contained in the Reports was up-to-date when collected, some information may now be dated given the speed with which changes are occurring in the marketplace. In this same vein, the market projections 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 GATT 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. The results of the Study should, therefore, 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.

Ed Wong

Marketing Services Branch
Marketing Directorate
Fisheries Economic Development and Marketing
Department of Fisheries and Oceans
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WORLDWIDE FISHERIES MARKETING STUDY
IVORY COAST

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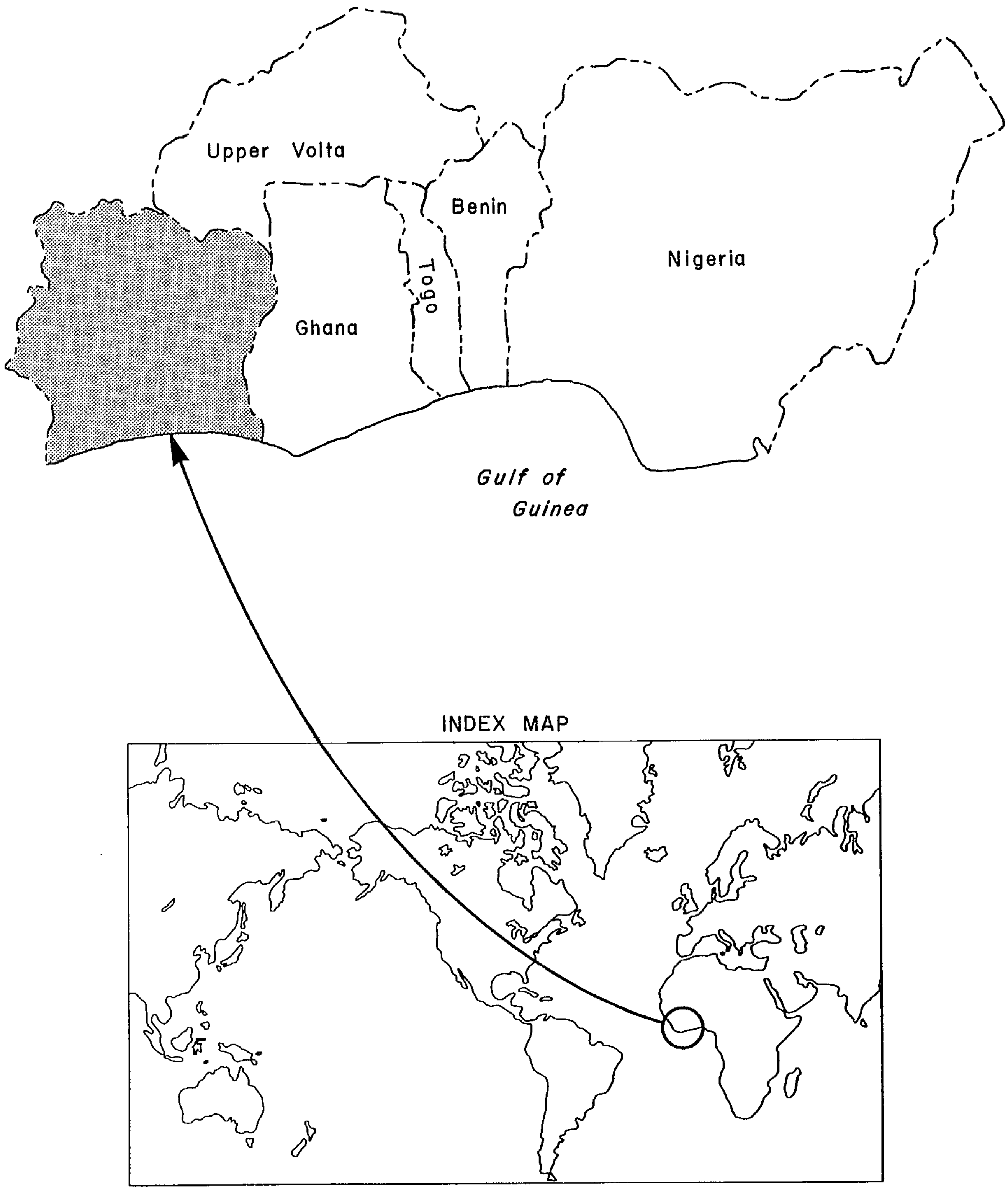
IVORY COAST


Upper Volta
Benin
Togo
Ghana
Nigeria
Gulf of Guinea
INDEX MAP

A. INTRODUCTION

Situated on the west coast of Africa, the Ivory Coast has a population of 8 million, including 2.85 million foreign workers. The average annual growth rate is 4%, including immigrants. French is the official language. (see Appendix XI for general descriptive data.)

In 1980, the Ivory Coast celebrated the 20th anniversary of its independence from France. Since 1960 the republic's economy has performed remarkably well, especially in comparison with the economies of other sub-Saharan African nations.

The Ivorian government has been following a strategy of maximizing growth by exploiting the country's comparative advantages as an agricultural producer, and this has obviously been paying handsome dividends. The average gross domestic product in 1977 was C$817 per capita, one of the highest on the continent. Exports of such products as cocoa and coffee, along with significant revenues from the tourist industry, have produced much of the cash flows needed to upgrade the country's industrial capacity and infrastructure. The government has adopted liberal policies toward foreign private investment, and it welcomes foreign labour and managerial talent.

A climate of political stability has also contributed significantly; enhancing the nation's generally good reputation and opening the way for Ivorians to acquire developments funds, at very favourable interest rates, from international agencies.

Just how long the current degree of political stability will continue is uncertain. Felix Houphouet-Boigny, president of the republic since independence, was 75 years old in 1980. He appears to be in good health, but there is natural concern over who will succeed him, and whether the succession might produce a political upheaval. Most observers believe that, whoever the successor, President Houphouet-Boigny's policies and practices will continue.

It should be noted, however, that the president appears to be a man of complex motivations. He is well known as an opponent of communism, yet he allows the USSR, Poland and other Eastern Bloc countries to trade with his nation and invest in it. Frozen fish is but one of many products supplied by Communist countries.

As noted, the economic performance of the Ivory Coast has been outstanding by comparison with that of other nations in the region, but the country has nonetheless been experiencing some problems. In 1978, senior policy-makers decided the economy was overheating. To stem the high rate of inflation and improve its debt profile, the country drastically reduced its foreign debt, and cut public sector spending. The 1979-1981 Loi Programme (rolling three-year plan) was adjusted downward and the Budget Speciale d'investissement, (Public Capital Investment Budget) was similarly reduced. Import taxes were raised substantially and value-added taxes were also increased.

To date, these measures have had little noticeable effect. Prices for most exported primary goods are depressed or static; production is down for most products and imports are up. Of greater concern is the cost of servicing the country's debt: from 5% of exports in 1969, to 11% in 1975, to 14% in 1978 and to 18% in 1979. At this rate it would be expected to reach 25% by 1982. This is unacceptable to the present government and to many of the international agencies from which the country borrows funds. Some further cuts are thus expected.

Agricultural expansion and diversification will continue as the fulcrum of Ivorian planning, investment and economic growth. Major infrastructure projects, which by African standards are reasonable in scale and in cost, will continue.

The Ivorian government encourages foreign investment and indeed maintains one of the most liberal investment codes in Africa. No legislation exists to limit the degree of foreign participation.

Most of the labour on the cocoa, coffee, banana and pineapple plantations is non-Ivorian, from such neighbouring countries as Mali, Upper Volta and Guinea. These unskilled workers from outside are needed because native Ivorians tend to be reluctant to do menial work at low wages and try to avoid working in certain other industries, including the coastal fishery.

Other economic concerns include a decline in world consumption of cocoa, and a corresponding drop in prices. And many observers, including the World

Bank, have warned the country about the continued depletion of its forest resources. About 80% of forest production is exported, and reforestation efforts are too slow.

Overall, there is some concern about how long the country's relative economic strength can endure. At present, the nation has a healthy balance of trade, continues to be a good investment prospect in many development areas and a good market for consumer and durable goods.

Because of its historical connection as a colony of France, the Ivory Coast receives most of its foreign investment funds from that country. France is also its main supplier and its largest market (see Appendix II). Nearly 50 000 French businessmen and technicians live in the country, running its businesses and advising its government. French cabinet ministers pay frequent visits to Abidjan to consult with Ivorian government officials.

Although the links with France are deep and durable, the Ivory Coast encourages investment and trade with other countries. Indeed, trade with other member nations of the EEC and Japan has expanded greatly in recent years, at the expense of France.

Canadian trade with the Ivory Coast has been, at best, marginal (see Appendix III) accounting for only 4% of total trade with sub-Saharan Africa in 1979. Even so, the volume has doubled in the last two years, due largely to Canada's involvement in major railway construction projects. Railway and street railway rolling stock are the major Canadian export items.

B. DEMAND

1. Present Consumption of Fish

Fish is a major item in the diet of the Ivory Coast people, accounting for about 70% of all animal protein consumed.

There have been fluctuations in both total and per capita consumption over the past decade, caused by changes in supply rather than demand. Domestic production is not sufficient to serve the potential market and the government has placed restrictions on imports.

Total consumption increased from 94 673 tonnes in 1970 to a peak of 189 500 tonnes in 1976, following which it declined to 155 438 tonnes in 1978. Average annual consumption per capita also has varied widely, from 25 kilgorams in 1971 to 27 kilograms in 1976 and down to an estimated 20 kilograms in 1979. Table 1 shows the consumption figures in more detail.

TABLE 1

Fish Consumption in Ivory Coast, 1970, 1971, 1974-1978

Year/Total Consumption	1970	1971	1974	1975	1976	1977	1978
(t)	94 673	100 000	147 008	174 234	189 500	155 643	155 438
Average consumption/person/annum	25kg			27kg	21kg	20.5kg	20kg (est.)

Source: Bilan des Pêches Ivoiriennes, 1977-78, Direction des Pêches Maritimes et Lagunaires, p. 16.

The decline in consumption over recent years is due almost entirely to a reduction in fish imports, and results from a government decision to allow only the publicly-owned company AGRIPAC to import fish in 1977 and 1978. There were problems, particularly with supplies from USSR, and imports dropped dramatically. It can be assumed that consumption would have remained stable had supplies been available.

2. Trends in Consumption of Fish Products to 1985

Indications are that fish will become increasingly available in the future. Since January, 1980, 13 importing and distributing firms have been authorized to bring in fresh, chilled or frozen fish. The names of the companies are listed in Appendix I. This move toward the free market system was put in place on a trial basis in 1980. Each of the firms is allocated a quota, which can be adjusted in consultation with several government ministries.

Ivory Coast consumers prefer a fatty fish with minimum oil content of 18% to 20%, such as horse mackerel, sardinella and mackerel. Since much of the fish is smoked domestically, an oily fish is required to ensure that the product maintains its whole state and retains its flavour. The preferred size of fish is 25 to 35 centimetres in length, with as little size variation in each package as possible, since sellers often charge a fixed price per fish. Another factor to keep in mind is that Ivorians like a salty taste to their fish.

Prices fluctuate considerably, but generally must be kept low because the largest market is among the lower and middle income groups, for which fish is the major source of protein. The pricing situation could be a serious deterrent to some Canadian suppliers wanting to enter the market.

Fish consumption has grown at an annual average rate of 8% even though the available supplies have fallen short of meeting demand, with the result that consumption fell below the level that might have been expected. In the next 20 years, total consumption is expected to increase steadily although at a slightly slower pace. This is due, in part, to competition from meat and poultry products. Table 2 details the projected demand for fish until the year 2000, and indicates demand will nearly double even assuming a slower growth rate.

TABLE 2

Ivory Coast: projected demand for fish 1980-2000

Year	total demand (Tonnes)
1980	207 000
1985	233 675
1990	281 658
2000	407 680

Assumptions:

- Population estimate 1980: 8 066 400
- Population growth/annum 1.7%
- Immigration growth/annum 1.3%
  (less growth anticipated than in past decade)
- Per capita consumption 1980 - 20 kg
  1985 - 25 kg
  1990 - 26 kg
  2000 - 28 kg
- Rate of growth in consumption between 1985-2000 is 0.6% per annum
- Consumption growth between 1980 and 1985 would represent a return to early 1970s levels as the economy and fish import and production systems stabilize and increase respectively.

Source: Study team estimates based on information from various sources.

C. SUPPLY

Current and Expected Supply Picture to 1985

1. Domestic Production

The local industry has a number of built-in disadvantages. Fish are not plentiful in the country's offshore waters, and the fishermen are operating with a fleet of boats that are both small and aged. Furthermore, the Ivory Coast is not traditionally a fishing nation, and that makes it difficult to train and motivate the population. Government officials suggest that neighbouring countries with richer fish stocks are making it increasingly difficult to negotiate bilateral agreements that permit the Ivory Coast fleet to fish in their waters.

The Ivory Coast fishing fleet is described in detail in Appendix IV. The coastal fleet is not large and its catch size, apart from a 10% increase in 1977, has remained at about the same level for several years. Ivorian stocks are diminishing and the catch size has only been maintained by the acquisition of limited fishing rights off the coasts of Guinea, Angola, Senegal and Mauritania.

The value of fish caught by coastal trawlers has increased substantially (in 1976-77, 28%; in 1977-78, 35.2%) due primarily to the drop in imports of frozen fish in 1977, which put demand pressure on prices. In addition, prices have risen to reflect increases in such costs as fuel and wages.

Catch by species for the years 1973-78 appear in Table 3 and in more detail below. Excluding tuna, the main species caught are bottomfish, chiefly grunts and croakers. Sardine and mackerel catches have dwindled recently. Many sources suggest that these stocks have been overexploited by foreign fishing fleets. One importer told the study team's members: "They have scraped the bottom of the sea clean".

Information on lagoon and artisanal fisheries is difficult to collect. It is known that 110 000 hectares of lagoons are exploited. Local fishermen use small canoes (Piroques) and lines or nets. The catch consists primarily of sardinella, lapianotus and machoiron, a local fish. These fish are marketed locally in the fresh or smoked state.

The artisanal fishery's total catch is approximately 25 000 tonnes, (13 000 from the lagoons, 6 000 from the lakes and 6 000 tonnes from the seashore). The artisanal fishery is a developmental priority of the government and they hope to raise domestic production to 50 000 tonnes by 1980. This seems unlikely to be achieved.

The government is also interested in promoting aquaculture. Early attempts to raise carp in floating cages were not successful but the government is optimistic that quantities of fish can be produced to supplement other types of domestic production and significantly reduce imports. The target is also unlikely to be reached.

a) Tuna

The tuna fishery is very successful and has produced significant quantities of product for export. Three companies are authorized to fish for tuna. In 1978, they caught over 15 000 tonnes of tuna. The average age of the fleet is only six years and in 1980 several new transatlantic boats are to be added to fish off Angola and other equatorial countries. These additional vessels are expected to increase the total catch to 25 000 tonnes. The fleet, a joint venture with France, had a compliment of 36 ships in 1978. Three types of tuna are fished: albacore (yellowfin), skipjack and bigeye.

b) Sardines

The catch was down substantially in 1978 due, in part, to the gradual disappearance over the last 10 years of the Ivory Coast sardinella stocks, accompanied by a similar reduction in the mackerel stocks (Scomber japonicus). Mackerel eat sardinella, thus the disappearance of the food source leads to the disappearance of the predator. Also, a major part of the sardinella catch is herring (sardinella eba) and this stock off the West African coast is biologically unpredictable. Many sources suggest that these stocks have been overexploited by foreign fishing fleets.

TABLE 3

Ivory Coast: landings by species, 1973-1978

Country	Species	1973 tonnes	1974 tonnes	1975 tonnes	1976 tonnes	1977 tonnes	1978 tonnes
IVORY COAST							
Freshwater Fish NEI		3 600	3 600	3 600	1 700	1 700	1 703
Tonguefish	CYNOGLOSSIDAE	400	505	580	465	431	534
Sea Catfish	ARIIDAE	600	543	620	1 500	1 424	1 389
Conger Eel NEI	CONGRIDAE	-	-	-	-	-	-
Demersal Percomorphs NEI	PERCIFORMES	100	-	-	-	-	-
Bigeye Grunter	BRACHYDEUTERUS AURITUS	2 600	3 780	2 750	3 590	4 690	6 158
Grunt (Grunter) NEI	POMADASYIDAE	1 100	1 221	920	2 300	2 130	1 582
West African Croaker	PSEUDOTOLITHUS SPP	3 000	3 211	3 700	3 660	3 310	4 006
Porgies, Seabream NEI	SPARIDAE	1 600	1 222	840	1 515	2 140	2 531
Sicklefish	DREPANE AFRICANA	500	388	460	925	650	639
Barracuda	SPHYRAENA SPP	-	-	-	-	-	-
Threadfin	PLYNEMIDAE	1 700	1 840	2 110	2 730	2 390	2 629
Atlantic Moonfish	SELENE (=VOMER) SETAPINNIS	0	0	370	790	982	1 290
Carangids NEI	CARANGIDAE	3 900	4 450	2 110	800	1 359	1 607
Sardinella NEI	SARDINELLA SPP	18 800	22 152	19 460	22 230	19 501	15 555
Bonga	ETHMALOSA FIMBRIATA	14 000	14 000	14 000	14 000	14 000	14 000
Clupeoids NEI	CLUPEOIDEI	100	19	-	-	-	-
Little Tunny	EUTHYNNUS ALLETTERATUS	0	1 583	860	400	431	38
Skipjack Tuna	KATSUWONUS PELAMIS	1 000	2 350	3 500	3 110	6 327	5 602
Yellowfin Tuna	THUNNUS ALBACARES	2 500	3 015	4 830	7 420	10 026	10 138
Largehead Hairtail	TRICHIURUS LEPTURUS	400	767	840	1 530	3 965	1 869
Chub (=Spanish) Mackerel	SCOMBER JAPONICUS	200	84	0	0	0	0
Mackerel-like Fish NEI	SCOMBROIDEI	-	-	0	0	0	0
Sharks, Rays, Skates, etc.		700	646	640	630	767	1 016
Marine Fish NEI		4 900	6 605	2 880	4 200	3 684	3 225
Freshwater Crustaceans NEI	CRUSTACEA	2 400	2 400	2 400	2 400	2 400	2 400
Natantian Decapods NEI	NATANTIA	1 400	870	1 000	1 100	1 100	1 100
Green Turtle	CHELONIA MYDAS	-	-	-	-	-	-
TOTAL		65 500	75 251	68 470	76 995	83 407	79 011

Source: FAO, Yearbook of Fishery Statistics, 1979, Vol. 46, p.270.

The values of these catches in 1977 and 1978 also increased substantially due to the drop in imports which increased the values of all fresh and chilled fish.

The future of this fishery is largely dependent on Ivorians obtaining licences to fish in foreign waters.

c) Shrimp

Shrimp catches are made by both industrial and artisanal fisheries. Industrial catches of shrimp for freezing are small but prices are good, making shrimp fishing highly profitable. It is important to balance the catches of off-shore shrimp with that of lagoon shrimp since these are, in fact, the same stocks in two different stages of development.

d) Fishery Products

(1) Smoked Fish

About two thirds of the domestic catch ends up on the consumer market as smoked fish, as does a large proportion of the imported catch. Smoking is the traditional method of preserving fish. Many villages on the roads leading out of Abidjan have crude smokehouses, which make up a large cottage industry. It is estimated that around 30 000 people are employed directly and indirectly in the smoked fish industry, and most of them are women.

(2) Fish Flour

One company, REAL (Recherche et Expansion de l'Alimentation), manufactures fish flour. The capacity of its new plant is 1 800 tonnes. The company employs 12 people.

(3) Nuoc-Mam

Nuoc-Mam is a type of fermented fish sauce made with equal parts of oil and fermented fish, both herring and sardinella. Production capacity is

400 000 litres per year. Sales in 1979 totalled 80 000 litres, some of which was exported to neighbouring African countries.

2. Imports

The study team was supplied with two sets of import data by two different government departments. These data deviate significantly. The import data supplied by the fisheries people, La Direction des Pêches Maritimes et Lagunaires, showed total imports to be substantially different for each of the years 1976-1978 than totals supplied by the Ministère du Commerce, Direction du Commerce Extérieur (La Direction générale des douanes). Both sets of data can be examined in detail in Table 4. The deviation in total varies by 23% in 1976, with the high side on fisheries; 33% in 1977, with the high quote from commerce; and 17% in 1978, again with the high quote from commerce. These discrepancies are accounted for primarily by two categories of fish imports: fresh fish, chilled and frozen and tuna, fresh and frozen. The accuracy of figures for the former is of the most concern.

It is not known if the estimates on the high side (assuming they are accurate) represent increases in fish available for consumption over the totals shown in Table 1, or if they represent displacement of domestic production, thus maintaining per capita consumption at the quoted levels. If one does choose to believe the Ministère du Commerce Extérieur data it simply means the Ivory Coast is, in the last couple of years, an even better market for frozen fish imports than the calculations made here would indicate.

Fish imports of 75 047 tonnes in 1979 accounted for 43% of total fish consumed. This percentage represents a significant decline from a peak of 55% of total consumption in 1976 but remains a substantial trade flow. Indeed the volume of imports is expected to increase in 1980 and beyond unless the government imposes import restrictions or the country's ability to pay declines.

TABLE 4

IVORY COAST: fish imports
1976-1978, 1979 (partial)

		Supplied by Ministry of Fisheries (1)		Supplied by Ministry of Commerce (2)		
		(tonnes)	(C$)	(tonnes)	(C$)	% difference [(2)-(1)]/(1)
Fresh/frozen	1976	105 607	--	78 961	--	--
	1977	54 589	--	68 172	--	--
	1978	65 144	--	73 345	--	--
Salted/smoked	1976	1 600	--	1 794	--	--
	1977	768	--	831	--	--
	1978	654	--	651	--	--
Crustaceans/ molluscs	1976	6	--	67	--	--
	1977	57	--	84	--	--
	1978	125	--	132	--	--
Tuna, fresh/ frozen	1976	4 012	--	5 233	--	--
	1977	2 934	--	8 400	--	--
	1978	3 506	--	6 952	--	--
Totals	1976	111 225	41 mill	86 045	27 mill	-23 -34
	1977	58 348	28 mill	77 787	30 mill	+33 + 7
	1978	69 429	42 mill	81 080	43 mill	+17 + 2
	1979	75 047	--	--	--	-- --

Sources: *Bilan des Pêches Ivoiriennes*, 1977-1978, *Direction des Pêches Maritimes et lagunaires*, p.22.

Ministère du Commerce, Direction du Commerce Exterieur, la Direction générale des douanes, import 1976, 1977, 1978.

Interview with Dr. Luc Koffi, Director, *Pêches Maritimes et Lagunaires*, February, 1980.

For the last four years, fresh and frozen fish have accounted for almost 95% of the total volume of imported fish, and between 80% and 90% of the total dollar value of fish imported.

Fish imports by forms are shown in Table 4. The Ivory Coast imports small quantities of smoked, salted, and prepared fish and various crustaceans and molluscs. These products are sold in supermarkets in Abidjan to the expatriate and elite Ivorian populations and made available on the menus of the numerous resort hotels in the country.

The major suppliers of fish according to both sets of data supplied are, in order of importance: the USSR, Senegal and France. Details are given in Table 6.

These three countries accounted for nearly 80% of total fish imports in 1976; 52% in 1977, and nearly 75% in 1979, according to the Department of Commerce figures.

Other suppliers of frozen fish include Poland, Sweden, Spain, East Germany and, more recently, New Zealand.

Approximately C$9 million worth of low-value frozen imports in 1978 was used as bait for the Ivorian tuna fleet.

Importers prefer to deal directly with suppliers. Much of the supply comes through Las Palmas or via agents from France or other countries.

Frozen imports classified by species in order of importance using Department of Fisheries statistics are as follows:

TABLE 5

Ivory Coast: frozen fish imports by species, 1978.

SPECIES	tonnes	percentage of total (%)
Horse mackerel	36 015	55.3
Sardinella	10 227	15.7
Mackerel	4 921	7.6
Other	4 429	6.8
Croaker	2 401	3.7
Machoirons	1 972	3.0
Sea bream, pandora	1 471	2.3
Japons	822	1.3
Carp	799	1.2
Dorade, common sea bream	723	1.1
Hogfish	643	1.0
Ceintures	589	0.9
Bluefish	97	0.1

Source: Bilan des Pêches Ivoiriennes, 1977-1978, Direction des Pêches Maritimes et Lagunaires, Annex IV.

Ministry of Commerce figures are given in Appendix VI.

TABLE 6

Ivory Coast: fish imports by country of origin
major suppliers

	1976 Q tonnes	1976 V (CFA mill)	1977 Q tonnes	1977 V (CFA mill)	1978 Q tonnes	1978 V (CFA mill)
USSR Exports to Ivory Coast						
Sardinella, Fresh/frozen	1 215	81 889	981	70 289	3 824	296 015
Sardines, fresh/frozen	609	41 118	2 883	189 751	-	-
Mackerel, fresh/frozen	3 129	210 631	204	16 281	192	18 184
NES, fresh/frozen	43 161	2 903 520	16 251	1 221 838	23 845	2 162 674
TOTAL	48 114	3 237 158	20 319	1 498 159	27 861	2 476 873
Senegal Exports to Ivory Coast						
Sardinella	5 572	339 310	6 446	423 468	5 251	375 688
NES	9 209	776 654	9 173	910 528	13 589	1 513 509
TOTAL	14 781	1 115 964	15 519	1 333 996	18 840	1 889 197
France Exports to Ivory Coast						
Freshwater (breeding stock)	-	-	-	-	47	15 432
Mackerel, fresh/frozen	-	-	1 203	98 396	5 297	474 403
Tuna, fresh/frozen	4 134	566 607	1 518	1 114 275	5 300	1 149 491
NES, fresh/frozen	1 321	114 775	1 808	152 434	2 738	230 608
Smoked Fish	-	-	6	19 920	12	35 212
Oysters, fresh/chilled	19	17 311	-	-	38	34 032
Molluscs, fresh/chilled	30	27 405	-	-	26	14 260
Other molluscs, NES	-	-	55	55 785	56	58 802
TOTAL	5 504	726 098	4 590	1 440 810	13 514	2 012 240

Source: Computer printouts - La Direction générale des douanes, Ministère du Commerce, Abidjan.

In addition, the republic of Mali supplies nearly all of the freshwater salted and freshwater smoked fish imported.

Products imported from Senegal and Mali enter at a lower rate of duty due to the special preferential system established by the West African Economic Community (CEAO), of which both countries are members.

3. Exports

Tuna is one of the Ivory Coast's most successful processed food export industries. Abidjan is the major tuna port in West Africa and it is a base for the tuna fleets of the Ivory Coast, France, Morocco, Spain and the United States. Asian boats (primarily Japanese), have unloaded in Las Palmas and Tema, Ghana, since 1978 as supplies and bait available at these ports better suit their needs. Abidjan's position is expected to be reinforced due to its location and changes in territorial waters.

Landings of tuna for the year 1978 were as follows:

TABLE 7

Tuna Landings in Abidjan, Ivory Coast, 1978

	tonnes
Ivory Coast, France, Morocco purchased by SOVETCO	56 370
Spain	16 537
Morocco (other)	3 954
Japan	1 000
TOTAL	77 861

Source: Bilan des Pêches Ivoiriennes, 1977-1978, Direction des Pêches Maritimes et Lagunaires, p.7.

The US boats use Abidjan as a port for taking on supplies and bait. Their tuna catches are unloaded in Puerto Rico. SOVETCO (Société de vente du thon congelé) purchases most of the tuna and re-sells it to firms such as SCODI and Pêche et Froid which have canning facilities in Abidjan.

SCODI has been operating in Abidjan for 16 years and is part of the Saupiquet group, with head offices in Paris, France. The firm's fleet, fishing under the French flag, operates off the West African coast with quotas, but also purchases tuna from SOVETCO. Tuna is packed in brine (52% of production), in oil (42% of production) and in tomato sauce (6% of production). Nearly 100% of the production of 13 231 tonnes was exported in 1979, primarily to France, but also to the UK, FRG, Denmark and Italy. Star-Kist of the US is also a customer. Any tuna sold domestically is sold to Europeans living in the country as the price makes it prohibitive to most Africans.

Pêche et Froid has been in business only a short time. Its facilities are extremely modern and employ 600 people - a similar number to SCODI. It is 80% owned by Pêche et Froid of Boulogne-sur-mer in France. Its supplies of tuna come primarily from the French fishing fleet, but it will also buy tuna outright from other foreign fishing fleets. Products are canned under the Poupon Rouge label but the firm will occasionally pack fish under private label for others. Capacity is 8000 tonnes. Exports in 1979 totalled 6000 tonnes.

These two firms when operated at capacity, account for 30% of the French tuna fish market, while about 55% of their parent firms' outputs are now canned in Abidjan. Packing costs are 25% less than at similar plants in France.

D. DEMAND-SUPPLY BALANCE

In 1979, the total landings of the domestic fishery of the Ivory Coast were worth 14 billion CFA, or C$ 76 million.[1] This domestic catch supplied 57% of the country's total consumption needs and provided direct and indirect employment for nearly 60 000 people.

The ability of the domestic fleet to supply even 50% of domestic consumption needs is expected to become increasingly difficult in the years ahead.

Exports of tuna and shrimp help balance the imports of other fish. In 1979, fresh and canned tuna and frozen shrimp exports of 15 000 tonnes generated 6 billion CFA which covered approximately 85% of the value of fish imported.

The fishing sector is included in the Ivorian five-year development plan. A new plan has been prepared for 1981-85. In the 1976-80 plan, investment in the fisheries was expected to reach 17.6 billion CFA, 16.4 billion CFA from public sources and 1.2 billion CFA from private sources. Appendix V outlines this intended investment, although its implementation was affected by an austerity budget in 1978.

[1]The Ivorian unit of currency is the franc. At the March 1980 average rate of exchange, 185 CFA = $1 Canadian.

E. POTENTIAL TRADE

1. Market Potential for Canadian Exports

Although the Ivory Coast is one of the most prosperous countries in sub-Saharan Africa, as a market for fish it consumes primarily low-value, fatty species. With a population of 8 million (approximately one-tenth the size of Nigeria's) it does, however, import substantial quantities of fresh frozen, whole, round fish - - at 65 000 tonnes in 1978, nearly one-third the quantity imported by Nigeria in the same year. In the mid 1970's, the Ivory Coast imported fresh/frozen fish in quantities equal to that of Nigeria. Fresh and frozen fish constitute nearly 95% of total fish imports in recent years. Fish imports are expected to grow at a healthy rate. Domestic production is not likely to cover more than 50% of total demand in future years.

The market is particularly price sensitive. Prices in the last two years probably have been non-competitive for some Canadian producers. Stiff competition comes mainly from the USSR, Bulgaria, and nearby Senegal. Horse mackerel, sardinella and mackerel are the most popular species. Unless prices rise much beyond the 1980 Spring price of C$475 CIF Abidjan per tonne for frozen mackerel, the market might not be viewed by some Canadian suppliers as particularly lucrative. Tariffs for fish products are also substantial. A Canadian processor atempting to sell his product at a typical non-African price, plus tariffs, may find it difficult to compete.

There is, however, some room for optimism. Sales of canned Canadian fish products have been made in the past. Although the market for these is small, competition for the higher-value species such as smoked salmon and smoked herring comes from Europe. Canadians have a good chance of making a sale based on price, because the consuming market is primarily of European descent. This market can afford to pay higher prices for good quality Canadian products.

Ivory Coast importers indicated an intention to diversify supply, if possible, assuming prices are competitive.

Also, Canadian firms might wish to explore investment possibilities in the fishing industry rather than concentrate on the direct import option. One firm maintained its own small fleet under French flag and was interested in talking about possible joint ventures with Canadian firms. It might be worth noting here that the Ivory Coast supports liberal policies towards foreign private investment, including unrestricted repatriation of profits and earnings.

Possibilities may also exist for Canadian suppliers of supplies and equipment for the fisheries and related industries. In the past, most of these needs were satisfied by French firms, but a swing to diversification of trade has made many Ivory Coast businessmen open to any reasonable offer. The study team visited the largest cold storage firm and was told Canadian enquiries on their planned addition of 12 000 tonnes of cold storage in 1981 would be welcome.

A major consideration in doing business in this market is the need to communicate in French. Any Canadian supplier must possess this capability either permanently or through a hire arrangement.

A) Pricing Considerations

Suppliers to the Ivory Coast must be prepared for intermittent strong price competition. The market is interested primarily in low-value species. As long as the USSR continues to fish for large quantities of horse mackerel, chub mackerel and sardinella off the southwest African coast, it will, without major effort, find a ready market for these catches in the Ivory Coast. France can also be a major supplier producing corresponding effects on price.

Prices paid by local fish traders and importers for catches made by the purse seiner and trawler fleets for 1978 and the first nine months of 1979 are shown in Appendix VII. The average price paid per tonne for horse mackerel caught by the purse seiners from January to August 1979 was C$333 CIF Abidjan. The monthly average ranged from C$198 in August 1979 to C$426 in March 1980. Coastal trawler catches of horse mackerel were purchased at an average price per tonne of C$285 over the first nine months of 1979. Again the range was from C$166 in April 1979 to C$426 in March 1980. Prices for scomber mackerel are approximately 12-15% higher at any time than those of horse mackerel. These prices are highly erratic primarily because of the buyer-seller situation.

The Russians occasionally enter Abidjan with large catches to sell (over 10 000 tonnes) because of difficulties associated with unloading elsewhere. Until recently there existed only one authorized buyer and usually these supplies were too much for local storage capacity. The resulting market glut produced a sharp drop in prices. Buying is now authorized for many firms, which should help to increase prices to their levels of pre-1977, but the USSR remains accused of dumping. One importer said he believes the Russians are not concerned with making profits on fish sales since their ships are used primarily for intelligence and reconnaissance purposes. Fish exports might be, he said, largely a "convenience element" of their total operations.

The Ivory Coast government has, since March 1977, controlled price margins at all levels of distribution for fresh and frozen fish. The margins are as follows:

TABLE 8

Ivory Coast: authorized distribution mark-ups on fresh/frozen fish

	Mark-up
Fresh/frozen fish importer	3.5% on net purchase price
Wholesaler	12.0% on net purchase price
2nd middleman (wholesaler)	10.0% on net purchase price
Retailer	8.0% on net purchase price

Source: Ivory Coast, Ministère du Commerce, Direction du Commerce Extérieur, Arrêté N° 0012/MC/DPRF - D du 19/3/1977.

Any distributor is also allowed to add on costs associated with holding reasonable inventories when calculating his or her selling price.

The government is planning to establish a ceiling price for all types of fresh fish at the request of La Co-operative des Commercants de poisson. This action will no doubt encounter resistance from the fishing fleet owners. The Syndicat Armateurs d'Abidjan, an organization which represents the interests of shipowners registered under the Ivory Coast flag and landing their catches in Abidjan, says low-priced USSR import of mackerel and horse mackerel are putting pressure on the market for local catches, which are sold fresh. This creates problems for the Ivorian owners whose operating costs are escalating rapidly.

B) Cold Storage and Ice-making Facilities

(1) Abidjan

Two companies own all the general cold storage capacity, construct cold storage capacity for others, and supply ice to all ships entering Abidjan.

SOCEF (Société de Construction d'Exploitation des Installations Frigorifiques du Port d'Abidjan) has 25 000 tonnes of cold storage capacity, the largest facility of its kind in West Africa. It also has brining capacity of 90 tonnes per day, ice-making capacity of 150 tonnes per day, crushed ice capacity of 100 tonnes per day and block-ice making facilities.

SOGIP (Société Générale pour l'Industrialisation de la Pêche) is a smaller organization, having cold storage capacity of 3 500 to 4 000 tonnes and ice-making capacity for 250 to 300 tonnes per day. The company also services foreign ships, over 200 in 1978, for example.

(2) National Cold Storage Chain

A national cold storage system is in place to accommodate the quantities of imported frozen fish that must be distributed throughout the country. The following table outlines the system as of 1978:

TABLE 9

Cold storage units in the Ivory Coast - 1978

Region	Number of Depots Total Units	Capacity (tonnes)
South	93	7381
East	10	291
North	9	355
Central	53	1552
West Central	23	715
West	16	250
TOTAL	204	10544

Source: Bilan des Pêches Ivoiriennes, 1977-1978, Direction des Pêches Maritimes et Lagunaires, p. 18.

Outside of the Abidjan district the tendency is to add cold storage units with a capacity of 100 tonnes or greater.

By 1980 this network has grown to 230 depots, one quarter of which are in Abidjan.

C) Distribution of Fish

The Ministry of Commerce, in addition to its responsibility for establishing the price structure, is charged with organizing an adequate distribution network, primarily for imported products. Some of the distribution activities associated with the industrial sector of the domestic fishery are the responsibility of the Industrial Fisheries Division, Department of Maritimes and Lagoon Fisheries.

As previously noted, the government-owned company, AGRIPAC, lost its exclusive right to import fish in 1980 and currently thirteen (13) firms are licenced to import.

The port of Abidjan is well equipped and operations are efficent. From time to time, inadequate cold storage is a problem. At least one private firm, SOCEF, plans to add 12 000 tonnes of storage capacity in 1981. Imported fish are held in private or public (DISTRIPAC) warehousing. From there they are moved through the channel, priced according to the government system in force.

Catches of the domestic trawler and purse seiner fleets are handled as part of the duties of SECPP (Société d'Exploitation de la Criée du Port de Pêche). Each fleet's catch is handled separately. The trawler catch is sold at auction, which begins around 5 a.m. The purse seiner catch is usually sold by private contract. The local fish traders, who hold extensive economic power, purchase the fish at auction and then sell it in the marketplace or to secondary wholesalers, at which point it is smoked.

The tuna catch is treated separately. Much of the tuna entering the port remains in Abidjan for canning, and then is exported. A small proportion of the catch is exported in a whole, frozen state. Charts 1 and 2 illustrate the distribution system for fisheries products in the Ivory Coast.

2. Market Entry Requirements and Barriers

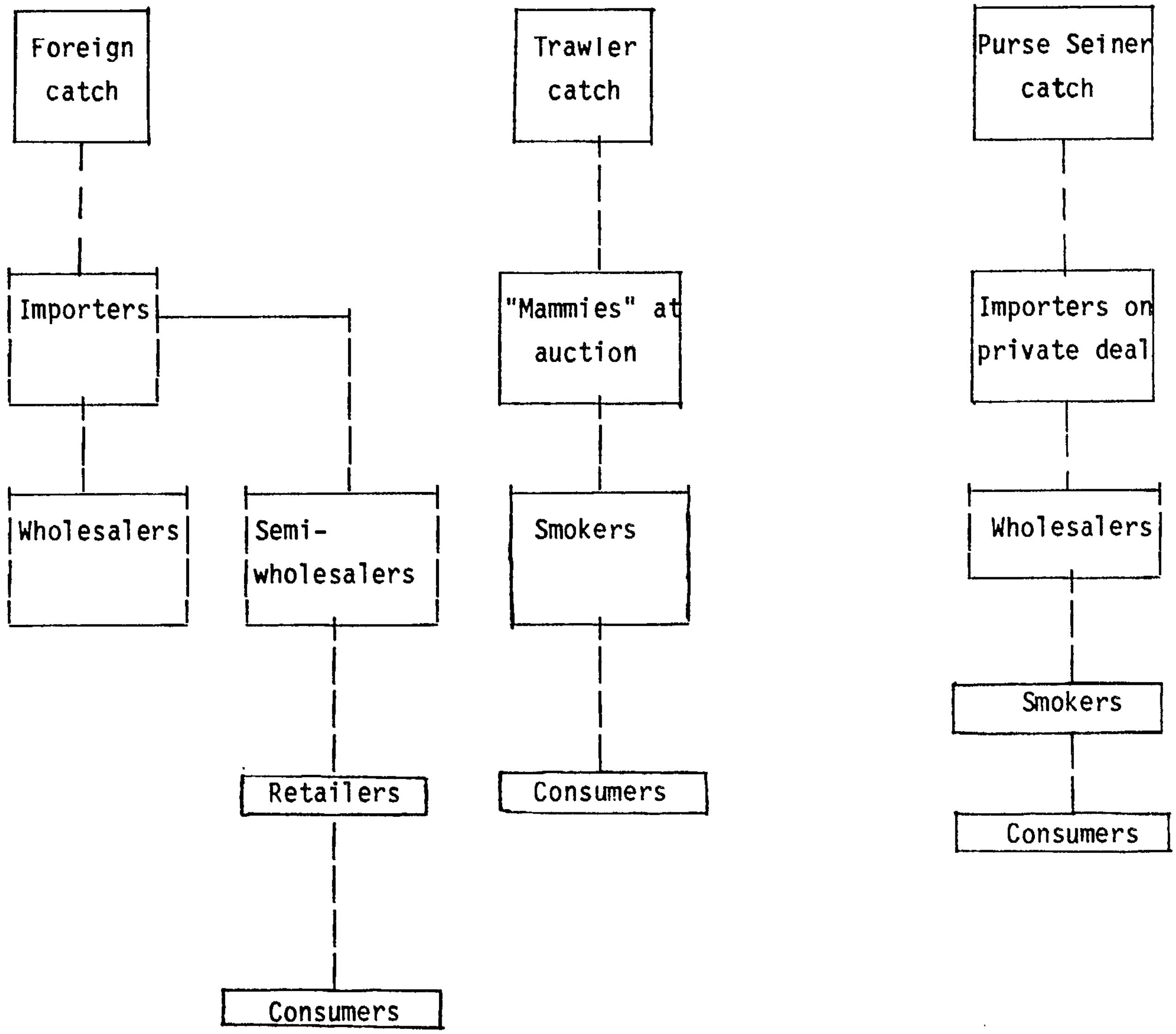
The Direction de Pêche Maritimes et Lagunaires (Department of Marine and Lagoon Fisheries) is the division of the Ministry of Animal Production responsible for policy development for the fisheries. This separate responsibility was created in April 1979 as part of a government program to improve investment and production in the fisheries. This department is also responsible for all aspects of health protection and quality associated with the catching, processing, importation and exportation of all fish products, along with stock assessments, enforcement and pollution control.

The department is made up of four divisions: the industrial sector, the artisanal sector, aquaculture development and laboratory analysis.

The industrial sector division covers warehousing, processing, and canning of fish landed by the Ivorian distant water fleet as well as some inshore facilities.

CHART 1

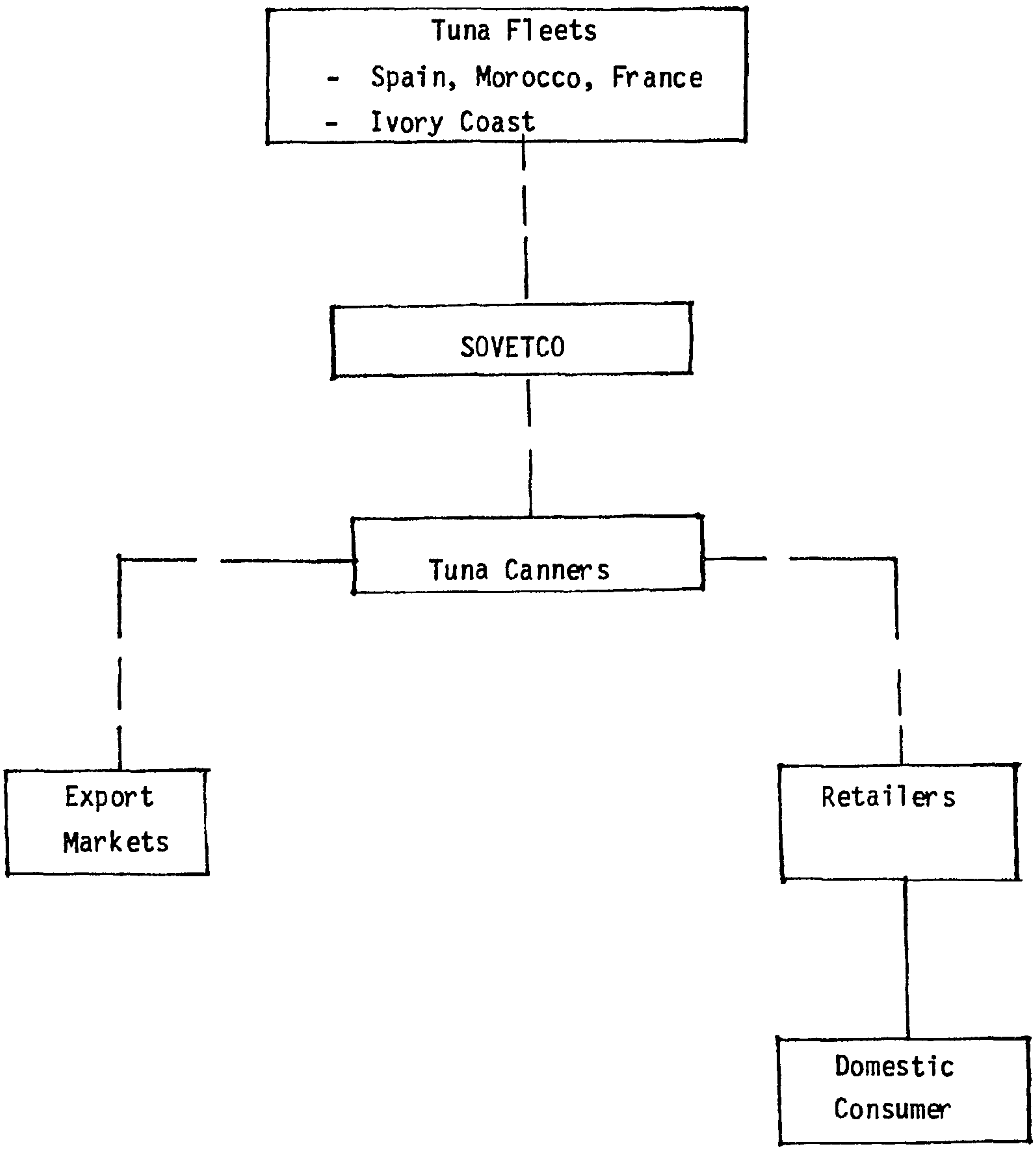
Schematic Diagram of Distribution of Species Other than Tuna



Source: Study team, observation, Abidjan, February 1980.

CHART 2

Schematic Diagram of Tuna Distribution



Source: Study team, observation, Abidjan, February 1980.

The artisanal division's main responsibility is to organize fishermen into groups, help them obtain necessary financing for their boats, and promote and ensure proper quality control.

The department enforces the sanitary protection laws, which cover fresh products sold into or exported out of the Ivory Coast. A copy of these regulations appears as Appendix VIII. A facsimile of the sanitary health certificate forms Appendix IX. Although SGS (Société Génerale de Surveillance, S.A.) has been hired to perform a qualitative, quantitative and price comparison inspection of all imports, food products (including fish) are exempted from inspection prior to shipment.

The government is also directly involved in import licensing regulations as was shown in its decision to open up fish imports to 13 companies. Any import invoice valued at less than 500 000 CFA can be imported free of any licence. Any order valued above this figure must be accompanied by an Intention to Import which is applied for by the importer. In addition, transactions related to an order of this size must be domiciled with an authorized bank. Assuming any necessary paperwork is properly completed, importers can promptly purchase the necessary exchange.

The government imposes a set of tariffs on all fish imports except those from Mauritania, Senegal, Mali, Upper Volta and Niger, which are members of the West African Economic Community (CEAO). Fish imports from these countries are not subjected to any taxes or customs duties. It is possible that up to three separate duties can be charged, depending on the species entering and its physical state. Duties are substantial, as can be seen in an examination of Appendix X. Both the Droit Fiscal d'Entrée and the Droit de Douane are calculated on the value of the merchandise CIF Abidjan.

All import documents must be in French or come with a French translation. Documents required by Ivorian customs officials on any shipment from Canada include the commercial invoice (two copies in French, or with a French translation), a certificate of origin (two copies) and a bill of lading (or air waybill). The exporter must also furnish the importer with a pro forma invoice in French (or with a French translation) which is attached to the importer's application for a licence. Care must be taken to follow all customs regulations to the letter. Heavy fines are imposed for any irregularity.

All packaging (each crate, carton, case, etc.) must bear markings identifying the country of origin. This marking should be placed immediately under the brand name or the product name if no brand name exists. Lettering should be legible and be at least three millimetres high. Labels of products should also be marked with country of origin in either English or French and should indicate the date of production.

If forwarded under a carnet, commercial samples are admitted duty-free.

F. CONCLUSIONS

1. The economic performance of the Ivory Coast over the 20 years of its independence has been outstanding, particularly when compared to the economies of other sub-Saharan African countries. The country, as well, enjoys political stability. Its government has adopted liberal policies towards foreign private investment and welcomes foreign labour and managerial talent. Although the 1980's may not bring with it all the good fortune of the past 20 years, the country's economy is expected to perform well. It may also, however, be the decade in which a leadership change is experienced and the ensuing political, economic, and social consequences could result in a period of uncertainty.

2. Fish is the most important source of protein to the majority of Ivorians, comprising 70% of protein consumed. Consumption per capita averaged 20 kilograms in 1979, down from past years. This decrease was due primarily to the disappointing performance of a publicly managed distribution system during the years 1977 to 1979. This system has been changed on a trial basis which allows 13 firms to import fish. It is expected this will improve the situation this year and in the future if the new system is maintained.

Consumption, under a relatively conservative set of assumptions, is expected to double to over 400 000 tonnes by the year 2000.

3. Total fish imports reached 75 000 tonnes (conservative estimate) in 1979. This represents 43% of total fish consumption. Historically, over 95% of total quantities imported are fesh and frozen, whole, round fish. The market consumes primarily low-value, fatty species such as horse mackerel, sardinella, and mackerel. Major suppliers are USSR, Senegal and France.

4. Prices, both in terms of amount and in terms of fluctuation, could be a serious deterrent to some Canadian suppliers. Mackerel was selling at C$475 per tonne CIF Abidjan/Dakar in March 1980. This price level is one of the highest in the last three years. Prices are, however, expected to improve due to the new purchasing system instituted in 1980. On the other hand, horse mackerel, the most popular imported species, is still expected to be available

in large quantities from the Russians, Poles and Bulgarians. These countries' fleets continue to catch substantial numbers of cape horse and cunene mackerel off the South African, Namibian and Angolan coasts. Much of this product is directed into West African markets, including the Ivory Coast, often at relatively low prices.

Prices at various levels of distribution are regulated by the government through its series of maximum mark-ups at every level in the distribution chain.

5. Fish is consumed mostly fresh or smoked. There is only a limited market for imported smoked fish, since a large cottage industry operates to supply domestic needs.

6. Small quantities (around 7 500 tonnes in 1978) of processed fish and higher-value species in the fresh and frozen state satisfy the tastes of the Lebanese, French and elite Ivorian communities. These products are distributed through North American-type supermarkets and the institutional trade.

7. Although the country's domestic fisheries industry is not expected to account for more than 50% of domestic consumption per annum in future, it is, nonetheless expanding. Thus opportunities for joint ventures and/or supplying fisheries - related equipment and expertise may exist for Canadian suppliers.

8. The country maintains a large, successful tuna canning industry whose export sales covered nearly 85% of the value of fish imports in 1979. Abidjan is the leading tuna port in West Africa.

9. The government's involvement in the fish imports and distribution system includes designing the internal distribution system, authorizing distributors, establishing the pricing mechanisms, setting and enforcing quality and health standards and determining tariffs on fish imports.

10. Tariffs on fish imports are substantial (See Appendix X) for all countries but those which belong to the West African Economic Community (CEAO). Products of these countries enter free of all tariffs.

APPENDICES

APPENDIX I

LIST OF IVORY COAST FIRMS AUTHORIZED TO IMPORT
FRESH/CHILLED/FROZEN FISH AS OF JANUARY 23, 1980

CAPAFROID
COFRAL
CONGEL IMPORT
CODIPROPECHE
CIPA
ETS BANGALV SYLLA
IPC
LA MARÉE DU BINAVA
PROMOFROID
SIPCO
SICOPROMA
SOGIP
AVI-MA-CO

Source: L'Arrêté n° 4/MC/DCE du 23 janvier 1980, ministère du Commerce, Direction du Commerce Extérieur.

Each firm is allocated a quota which can be adjusted after consultations are held with several ministries. This system was put in place on a trial basis starting in 1980. Under this free market system, supplies are expected to increase.

APPENDIX II

IVORY COAST'S MAIN TRADING PARTNERS

Percentage of Total Value of Exports

	1976	1977	1978
France	25.4	25.7	23.4
Netherlands	13.1	15.1	18.7
USA	10.5	11.7	14.6
Italy	9.2	8.5	5.7
FRG	7.3	5.4	4.7
ECOWAS*	7.4	7.4	6.5
Other	27.1	26.2	26.4
TOTAL	100.0	100.0	100.0

Percentage of Total Value of Imports

	1976	1977	1978
France	38.3	39.4	39.3
USA	7.4	7.6	5.2
FRG	7.1	7.4	7.2
Japan	5.0	5.2	7.3
Netherlands	4.0	4.2	3.9
Italy	3.9	3.3	3.9
Nigeria	2.6	3.7	2.7
Others	31.7	29.2	30.5
TOTAL	100.0	100.0	100.0

Sources: Bulletin Mensuel; Chambre de Commerces; Moniteur Africain.

Economist Inteligence Unit, Annual Country Review, 1979, p. 20.

* Economic Organization of West African States

APPENDIX III

CANADIAN EXPORTS TO IVORY COAST
1977, 1978, 1979
(C$000)

IVORY COAST	1977	1978	1979
Other meat and meat preparations			
Fish, canned	51	25	
Other fishery foods and feeds			
Dairy produce, eggs and honey	4	106	
Wheat flour	279	197	168
Cereal preparations		1	
Fruits and fruit preparations		6	
Vegetable and vegetable preparations	6	18	12
Sugar and sugar preparations	1	6	
Other foods and materials for food	2	12	11
Other fodder and feeds		3	5
Whisky			
Other beverages		1	2
Other crude wood products	35	27	86
Textile and related fibres		14	6
Aluminum ores, concentrates and scrap			1
Other metals in ores, concentrates and scrap		2	
Other waste and scrap materials	94		
Lumber, softwood			43
Other wood fabricated materials		1	
Other paper		502	3
Yarn, thread, cordage, twine and rope		15	
Cotton broad woven fabrics	7	5	
Other broad woven fabrics	2	7	8
Other textile fabricated materials		8	
Oils, fats, waxes, extracts and derivatives	204	524	
Chemical elements	1		
Other inorganic chemicals			
Organic chemicals	1	1	
Synthetic rubber and plastic materials		18	11
Plastics, basic shapes and forms		488	163
Other chemical products		20	43
Petroleum and coal products		1	3 308
Bars and rods, steel		3	
Plate, sheet and strip, steel	1	13	10
Railway track material		3 140	
Other iron and steel and alloys	2 069	1 989	702
Aluminum, including alloys	613	193	2
Copper and alloys		1	
Metal fabricated basic products	1 383	1 481	358
Abrasive basic products			1
Other non-metallic mineral basic products	139	339	1
Other fabricated material inedible	19	170	63

APPENDIX III (Cont'd)

	1977	1978	1979
Engines and turbines, general purpose	2	12	25
Electric generators and motors	82	131	82
Other general purpose industrial machinery	115	386	466
Materials handling machinery and equipment	2 464	300	428
Drilling, excavating, mining machinery		67	1 439
Metal working machinery	54	13	18
Woodworking machinery and equipment	7		2
Construction machinery and equipment	323	75	88
Pulp and paper industries machinery			93
Other special industries machinery	1 250	1 067	162
Soil preparation, seeding, fertilizing machinery	7		
Combined reapers, threshers and parts			
Other haying and harvesting machinery		1	
Other agricultural machinery and equipment	217	3	16
Tractors	379	42	148
Railway and street railway stock		6	19 950
Passenger automobiles and chassis	13	149	64
Trucks, truck tractors and chassis	7	517	338
Other motor vehicles		109	603
Motor vehicle engines and parts		5	
Motor vehicle parts, except engines		306	1 361
Ships, boats and parts	31		
Aircraft engines and parts	7	72	
Aircraft parts, except engines	29	118	217
Other transportation equipment	47	17	220
Other telecommunication and related equipment	135	220	154
Heating and refrigeration equipment	21	155	492
Cooking equipment for food			97
Electric lighting and distribution equipment	1 609	833	197
Navigation equipment and parts			
Other measuring cont. lab. med. and opt. eqp.	166	549	168
Hand tools and miscellaneous cutlery		152	31
Office machines and equipment		19	3
Other equipment and tools	227	162	286
Apparel and apparel accessories	39	9	10
Toys, games, sporting, recreation equipment	7		
Other personal and household goods	223	20	87
Medical and pharm. products, in dosage	20	7	52
Medical, ophthalmic and orthopaedic supplies	3	5	
Printed matter	13	69	6
Photographic goods	12	47	17
Containers and closures	9	12	17
Prefabricated buildings and structures	1 362	362	163
Other end products	22	34	42
Special transactions, trade	57	75	9
TOTAL	13 868	15 469	32 557

Source: Statistics Canada, <u>Exports by Country</u> #65-004, pp. 171-173.

APPENDIX IV

FISHING FLEET OF THE IVORY COAST, 1977-1979

	1977			
	(1) Size of Fleet	(2) Catch (tonnes)	(3) Total Value (Mill CFA)	(4) Aver. Price at unloading (000 CFA/kg.)
Coastal trawlers	24	16 467	1 658	101
Purse Seiners	20	31 283	1 984	63
Tuna Fleet	6	16 324	3 004	180
Shrimpers - coastal	6	395	468	1 185
- lagoon		326		
Artisanal - inland waters		12 000	2 040	170
	3000-4000			
- lagoons		13 000	2 600	200
Inshore Fleet	12	20 000	3 000	150
A) Total		109 795	15 754	
			(C$64 million)	
B) Less exports (Shrimp & Tuna)		17 045		
C) Total domestic supply (fresh/chilled A-B)		92 750		
D) Plus: frozen fish		8 304		
E) Total domestic supply B+C+D		118 099		

	1978			
	(1) Size of Fleet	(2) Catch (tonnes)	(3) Total Value (Mill CFA)	(4) Aver. Price at unloading (000 CFA/kg.)
Coastal trawlers	25	16 032	2 241	139
Purse Seiners	21	24 642	2 329	94
Tuna Fleet	8	15 839	3 247	205
Shrimpers - coastal	6	380	514	1 352
- lagoon		373		
Artisanal - inland waters		12 000	2 532	211
	3000-4000			
- lagoons		13 000	2 743	211
Inshore Fleet	12	22 500	4 500	200
A) Total		104 766	18 106	
			(C$92 million)	
B) Less exports (Shrimp & Tuna)		16 592		
C) Total domestic supply (fresh/chilled A-B)		88 174		
D) Plus: frozen fish		2 220		
E) Total domestic supply B+C+D		106 986		

	1979			
	(1) Size of Fleet	(2) Catch (tonnes)	(3) Total Value (Mill CFA)	(4) Aver. Price at unloading (000 CFA/kg.)
Coastal trawlers	25	16 032	2 241	140
Purse Seiners	21	N/A	N/A	90
Tuna Fleet	10	N/A	N/A	N/A
Shrimpers - coastal	6	380	514	1 352
- lagoon		N/A	N/A	N/A
Artisanal - inland waters		12 000	N/A	N/A
	3000-4000			
- lagoons		13 000	N/A	N/A
Inshore Fleet	12	N/A	N/A	N/A
A) Total			14 000	
			(C$76 million)	

Source: Bilan des Pêches Ivoiriennes, 1977-1978, Direction des Pêches Maritimes et Lagunaires.

Interview with Dr. Luc Koffi, Director, Department of Marine and Lagoon Fisheries, February 1980.

APPENDIX V

INVESTMENT IN THE FISHING SECTOR - IVORY COAST - 1976-1980

(CFA millions)

	State	State Enterprises	Private	Total
Industrial Fishing:				
- Creations of a modern, deep-water fleet	1 280	6 800	420	8 500
- Tuna fleet expansion	450	2 100	450	3 000
- Coastal fleet expansion	50	350	100	500
- Abidjan fish port development	400			400
- San Pedro fish port development	600			600
- Port refrigeration facilities	220	660	220	1 100
Total	3 000	9 910	1 190	14 100
Coastal village fishing	330	800		1 130
Lagoon village fishing	225			225
Coastal and lagoon fishing research & development	125			125
River and lake fishing	1 050			1 050
Fish breeding	1 000			1 000
TOTAL	5 730	10 710	1 190	17 630

Actual Total Investment in Ivory Coast Fleet as of January 1 1980	19.08 CFA (C$34.5 million)
In port refrigeration facilities	1.28 CFA (C$2.5 million)

Source: Marketing in the Ivory Coast, Overseas Business Reports, U.S. Department of Commerce, May, 1979, p. 7.

APPENDIX VI

IVORY COAST: FISH IMPORTS BY TYPE - 1976-1978

	1978				1977				1976			
	Q	V	tonnes		Q	V	tonnes		Q	V	tonnes	
	tonnes	(000 CFA)	(000 CFA)	C$	tonnes	(000 CFA)	(000 CFA)	C$	tonnes	(000 CFA)	(000 CFA)	C$
Freshwater, fresh/frozen	50	19 606	392	1 990	6	6 177	1 030	4 460	3	4 791	1 697	6 600
Sardine, pilchard, f/f	29	2 321	80	410	3 180	209 221	66	290	1 130	68 382	61	250
Sardinella, f/f	9 249	683 169	74	380	9 076	600 198	66	290	7 630	470 717	62	260
Mackerel, f/f	5 531	497 190	93	470	1 979	162 674	82	360	4 435	319 192	72	300
Others, f/f (mostly horse mackerel)	58 486	5 424 661	93	470	53 931	4 514 822	84	360	65 763	4 623 598	70	290
Salted - freshwater	219	24 469	112	570	280	37 283	133	580	508	74 129	146	600
- marine	15	9 775	652	3 310	10	9 309	931	4 030	13	9 595	738	
Smoked - freshwater	384	40 723	106	540	509	74 241	146	630	1 247	164 160	132	3 050
- marine	33	74 973	2 272	11 520	32	49 458	1 546	6 690	26	25 700	988	4 080
Shark fins, tails	4	3 138	784	3 970	*	90	-		*	22	-	-
Shrimps, fresh/frozen	1	2 040	2 040	10 340	1	1 226	1 226	5 310	1	719	719	2 970
Rock lobsters, f/f	1	1 110	1 110	5 630	1	2 462	2 462	10 660	*	63	-	-
Crustaceans, NES												
- freshwater	1	1 256	1 256	6 370	*	108	-	-	*	72	-	-
- marine	1	1 621	1 621	8 220	1	1 659	1 659	7 180	1	904	904	3 740
Oysters, fresh/chilled	38	34 047	896	4 540	14	11 536	824	3 670	19	17 311	911	3 770
Mussels, fresh/chilled	26	14 260	548	2 780	9	4 770	530	2 290	15	6 423	428	1 770
Molluscs, NES	59	62 488	1 059	5 370	57	57 213	1 004	4 350	30	27 563	919	3 800
Snails	1	957	957	4 850	1	586	586	2 540	1	782	782	3 230
Tuna, fresh/frozen	6 952	1 510 330	217	1 100	8 400	1 252 080	149	650	5 223	675 286	129	530
TOTAL	81 080	8 408 134 (C$43 million)			77 487	6 995 113 (C$30 million)			86 045	648 409 (C$27 million)		
Fresh/frozen	73 345				68 172				78 961			
Salted/smoked	651				831				1 794			
Crustaceans & molluscs	132				84				67			
Tuna, fresh/frozen	6 952				8 400				5 223			

Source: Data supplied by Ministry of Commerce, February 1980.

APPENDIX VII

FISHING CATCH (SEINERS) - COMPARATIVE PRICE ANALYSIS
(C$/lb.)

	Period Jan. 1978	Average price in 1978	% difference	Average price in 1979 (9 months)	% difference	Cumulative difference	
						Aver. Price (C$/t)	
Aoube	.046	.044	(7.7)	.075	47	20	112
Bobo	-	-	-	-	-	-	-
Bonite/Bonito	.049	.081	60	.096	76	68	167
Brochet/Pike	.095	.180	89	.222	115	102	379
Capitaine/Hogfish	.099	.121	23	.148	39	31	254
Carpe/Carp	.110	.133	21	.128	8	14	246
Ceinture	.060	.066	11	.062	(5)	3	121
Chinchard/Horse Mackerel	.100	.090	(11)	.101	(7)	(9)	179
Friture	.045	.048	7	.054	11	9	97
Guinee	.100	.106	6	.117	8	7	211
Hareng/Herring	.047	.051	10	.053	5	7	98
Japon	.102	.102	-	.117	6	6	213
Liche	.102	.107	5	.118	7	6	212
Maque Bonne	.134	.113	(18)	.143	(1)	(9)	239
Ombrine/Croaker	.074	.072	(2)	.104	30	14	165
Plat Plat	.060	.054	(12)	.049	(30)	22	143
Rasoir	.041	.043	5	.052	19	12	89
Requin/Shark	.076	.070	(10)	.090	9	-	150
Sardine/Sardinella	.057	.053	(8)	.055	(11)	(9)	102
Divers/Others	.041	.083	103	.106	140	121	178
Machoiron	-	-	-	.114	-	-	208

** Conversion ratios: 1978 197 CFA = C$1.
1979 182 CFA = C$1.

APPENDIX VII

FISHING CATCH (TRAWLERS) - COMPARATIVE PRICE ANALYSIS
(C$/lb.)

	Period Jan. 1978	Average price in 1978	% difference	Average price in 1979	% difference	% Average difference
Bobo	.044	.066	48	.059	22	35.0
Brochet	.167	.177	6	.204	13	9.5
Capitaine	.052	.064	21	.074	30	25.5
Carpe	.093	.086	(8)	.094	(6)	(7.0)
Ceinture	.032	.049	52	.055	59	55.5
Chinchard	.065	.089	37	.086	23	30.0
Conore	.060	.088	46	.101	55	50.5
Dorade, Common Seabream	.104	.099	(5)	.099	(13)	(9.0)
Friture	.052	.053	2	.054	(3)	(5.0)
Guinee	.103	.087	(18)	.097	(15)	(16.5)
Japon	.107	.093	(15)	.122	5	5.0
Liche	.064	.081	27	-	-	27.0
Loche	-	-	-	.089	-	-
Machoiron	.044	.044	1	.047	(1)	-
Maque Bonne	.083	.086	2	.108	19	10.5
Perch	.114	.132	15	.178	44	29.5
Ombriche	.065	.085	31	.102	45	38.0
Bream	.056	.073	30	.087	43	36.5
Plat	.049	.058	20	.054	3	11.5
Skate	.044	.056	27	.071	49	38.0
Shark	.052	.062	19	.085	51	35.0
Mullet	.061	.072	19	.082	26	22.5
Dory	.051	.064	27	.066	19	23.0
Sole	.091	.099	8	.117	19	13.5
Other	.063	.074	18	.080	17	17.5
Crab	.127	.267	110	.275	100	105.0
Shrimp	.504	.644	28	.534	(2)	13.0
Langouste/Crayfish/ Rock Lobster	.1001	.891	(12)	.1027	(5)	(85.0)
Turtle	.055	.071	28	.064	7	17.5
Croaker	-	-	-	.214	-	-

APPENDIX VII (Cont'd)

	Period Jan. 1978	Average price in 1978	% difference	Average price in 1979	% difference	% Average difference
Flying Gurnards	-	-	-	.085	-	-
Rasoir	-	-	-	.035	-	-
Chatchat	-	-	-	.042	-	-
Ladyfish	-	-	-	.185	-	-
Gurnard	-	-	-	.037	-	-
Bigeye redfish	-	-	-	.047	-	-
Turbot	-	-	-	.081	-	-
Zebre	-	-	-	.021	-	-

Source: La direction générale des douanes, Ministère du Commerce, Abidjan.

APPENDIX VIII

AN ORDER TO ESTABLISH HEALTH INSPECTION REGULATIONS FOR FISHING PRODUCTS IN THE IVORY COAST*

THE MINISTER OF ANIMAL FOOD PRODUCTION,

IN CONSIDERATION OF Order No. 76-163 of March 4, 1976, appointing the members of the government;

IN CONSIDERATION OF Order No. 70-331 of May 25, 1970, determining the responsibilities of the Ministry of Animal Food Production;

IN CONSIDERATION OF Order No. 63-328 of July 29, 1963, to establish health inspection regulations for animals in the Ivory Coast; and

IN CONSIDERATION OF Order No. 63-323 of July 25, 1963, relative to the health inspection of animals in the Republic of Ivory Coast.

HEREBY ORDERS AND DECREES AS FOLLOWS:

TITLE ONE:

SECTION 1: The term marine animals refers to all echinoderms, crustaceans, mollusks, cephalopods, reptiles, fish and other mammals living exclusively or seasonally in a marine environment.

TITLE TWO: QUALITY STANDARDS

A) For fresh landed fishing products

SECTION 2: The fishing products defined in Section 2, landed in the Ivory Coast or transshipped in the territorial waters of the Ivory Coast and destined

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* ORDER No. 0031/Ministry of Animal Food Production

for local consumption or for export in fresh, frozen or canned form must be recognized wholesome, i.e. present the following characteristics:

a) <u>For fresh fish</u>

-- fresh fish odour;
-- uncrushed rigid body, firm and elastic flesh resisting to pressure from fingers without retaining prints;
-- bright coloured skin and scales;
-- abdominal wall relatively firm, closed anus;
-- moist, shining, pink or blood-red gills;
-- clear eyes, sparkling, bright, shining, convex, transparent, occupying the entire eye cavity.

The following ratings are assigned based on the degree of freshness:

-- Extra quality	1
-- Excellent quality	2+
-- Good quality	2
-- Average quality	2-
-- Poor quality	3
-- Bad quality	4

b) <u>For crustaceans</u>

-- Appearance:
  - moist and shiny shell;
  - appendages solidly attached to the body;
  - abdomen slightly taut, firm, moist;
  - shiny and black eyeball;
  - white or yellowish-white and firm flesh;
  - light and pleasant sui generis odour.

Whole rock lobsters, lobsters and crabs must be still alive.

-- Commercial standards

- Raw or cooked shrimp processed in the Ivory Coast for export or local sale are subject to the following standards and quality designations:

Quality A or 1: up to 110 individuals per kg.

Quality B or 2: from 115 to 140 individuals per kg.

Quality C or 3: from 145 to 170 individuals per kg.

Quality D or 4: from 175 to 200 individuals per kg.

- Shrimps for export are packaged in cartons of 6 kg (maximum net weight) which must bear the quality designation and the letter identifying processing plant on one of its sides.
- Shrimps for the local market are packaged in cartons or displayed in bulk.

c) For molluscs

-- Hermetically sealed shell, difficult to open in the case of bivalves;

-- Presence upon opening of a limpid and colourless liquid in the cavity;

-- Live animal, adhering solidly to the shell;

-- Typical sea odour.

B) For Frozen or fast-frozen products

SECTION 3: Only fish and other edible marine animals of commercial size, presenting all of the characteristics of perfect freshness and good quality, and known to be suitable for preservation through freezing and for cold storage can be subjected to a freezing proces either on board ship or on land.

The degree of freshness of fish and other marine animals for freezing must be consistent with the provisions of Section 2.

Fish and other marine animals which have been prepared or processed prior to freezing (filleted, trimmed, skinned or cooked) must be well preserved and of good wholesome quality when the freezing process is applied. They must also be capable of yielding frozen products of good quality.

SECTION 4: Fish and other marine animals may only be frozen through a quick-freezing process.

The rate of lowering the temperature of fish and other marine animals when they are placed in a freezing device must be sufficient to minimize any change in texture and tissue make-up. The central temperature of fish must be lowered from 0° to -5° in no more than two hours.

These products must be kept in the freezing area until they are completely frozen; the core temperature upon exit must not exceed -18°C.

Products may be admitted for freezing or storage in cold storage establishments open to the public only upon presentation of a certificate of origin and health inspection issued by a qualified officer of the Lagoon and Maritime Fisheries Branch.

SECTION 5: Immediately upon leaving the freezer, fish and other marine animals must be placed in cold storage rooms kept at a temperature below -18°C. These cold storage rooms must be equipped with suitable facilities for optimum storage; they must always be properly maintained and kept clean; and they must never contain any substance that is maladorous or otherwise capable of harming fish quality.

The mercury container of the thermometer must be situated as far as possible from the source of cold and the temperature gauge must be at the entrance to the cold storage room.

SECTION 6: Exported or imported frozen fishing products must be placed in packages or frames suitable for cold storage and stored in the cold storage rooms described in Section 5.

SECTION 7: The use of colouring agents, antiseptics and other additives is prohibited. Special derogations may be allowed for products which have been subject to analysis by order of the Maritime Fisheries Service per the advice of the Food Product Inspection Commission and at the request of the user.

SECTION 8: Frozen or fast-frozen fish and other marine animals may be presented round, eviscerated, with or without the head, cut into sections, slices or fillets.

They must be protected from contact with air (pollution and oxidation);

- either by icing after freezing;
- or by sufficient protection to prevent the dessication and oxidation of the product before it is consumed; this latter provision is compulsory for fish fillets and slices.

SECTION 9: Use of the term fast-frozen or of any other name composed or derived from this term and evoking the idea of ultra-rapid freezing is reserved for fish and marine animals which:

- were in a perfect state of freshness at the time of freezing;
- met with the characteristics stipulated in Section 2 of this order at the time of freezing;
- have undergone the necessary sorting and trimming operations;
- have been subjected, for stabilization purposes, to a sufficient lowering of temperature to attain a core temperature of -18°C or less as soon as possible after capture or processing. The fast-freezing operation must be conducted in such a way as to cross very rapidly the maximum crystallization temperature zone;
- have been maintained, from the time of fast-freezing to the moment of sale to the consumer, at a temperature of -18°C or less.

SECTION 10: Packages containing frozen fish or other marine animals for export or import must bear prominently the following information:

- the name, trade name or trade mark of the freezing company or distributor;
- the name of the species, the name of the country of origin;
- the means of presentation;
- the net packing weight in grams;
- the date of freezing.

APPENDIX VIII (Cont'd)

SECTION 11: No fish or other marine animal not previously frozen may be introduced into a cold storage facility.

SECTION 12: Upon leaving cold storage, the frozen products cannot be shipped to consumption or processing sites unless they are perfectly wholesome and of a quality equivalent to unfrozen fish in a proper state of freshness.

SECTION 13: a) The freeze-processing on board of fish and other marine animals not previously refrigerated must begin no later than four hours after their catch.

b) The freeze-processing of fish or other marine animals which have been permanently refrigerated immediately upon catching must be carried out within a period of ten days, provided that the maximum temperature of the hold is +5°C and that a good covering of ice keeps the said catch at a constant temperature of no more than +1°C.

Fish destined for freezing must be washed very carefully before being placed in the freezer in order to completely eliminate any exterior blood, dirt and superficial fouling.

C) For semi-preserves

SECTION 14: All unsterilized fishing products made up of fish and other marine animals subjected to a preserving process and prepared in a consumable form are considered semi-preserves.

SECTION 15: Fish destined for the preparation of semi-preserves and particularly of dried products must be fresh.

SECTION 16: The characteristics of dried salt fish are as follows:

a) Appearance
- -- free of exuded salt and sand;
- -- uniformly dry and crunchy when bent;
- -- uniformly clear colour;

-- nearly odourless;
-- normally compact and non-friable flesh texture;
-- surface free of mould, viscous coating or mildew.

b) Chemical composition
-- maximum allowable moisture content: 35% of raw product;
-- salt content can vary between 10 and 20% of the product; taking into account the fact that this percentage must be approximately equal to half the moisture content of dried fish;
-- volatile basic nitrogen: for all fish except sharks and rays, the maximum content is set at 2% and must be expressed in relation to the total nitrogenized matter.

SECTION 17: The characteristics of smoked fish are as follows:

a) Appearance
-- free of sand or vegetable debris;
-- uniformly dry and emitting a clear sound when struck;
-- uniformly clear-brown colour;
-- smoked fish odour free of nauseating stale smells;
-- flesh texture normally compact, light, free of pits caused by parasites or parasite larvae, and free of mould, viscous coating and parasites.

b) Chemical composition:
Moisture: maximum allowable moisture content: 30% of raw product.
Volatile basic nitrogen: maximum content set at 2% of the total nitrogenized matter.

SECTION 18: The characteristics of dried pickled fish are as follows:

a) Appearance:
-- free of sand and debris;
-- characteristic pickled fish odour;
-- uniform yellow or brown colour;

-- free of mould and parasite larvae.

b) Chemical composition:
-- moisture: 30 to 40%
-- volatile basic nitrogen: 4 to 8% of the total nitrogenized matter.

D) For Preserves

SECTION 19: Perishable fishing products made up of fish and other marine animals placed in containers which are impervious to liquids, gases and microorganisms at a temperature of 55°C or less and subjected to heat treatment or another authorized process of destroying microorganisms, toxins and enzymes are considered as preserves.

SECTION 20: Fish and other marine animals destined for processing into preserves must meet with the provisions of Section 2 of this Order.

SECTION 21: The characteristics of preserves are as follows:

-- cans must be uniformly filled;
-- they must be free of identation, bulging, leakage and puckering;
-- the pH must be maitained to within 0.5;
-- absence of microbial flora for preserves marked sterile;
-- fixed microbial count in the other preserves;
-- maintenance of normal organoleptic characteristics.

SECTION 22: All species of bony and cartilaginous fish, with the exception of those designated as poisonous fish under Order No. 67-16 of January 11, 1967, may be used as raw materials for human consumption.

TITLE III: PRODUCT INSPECTION

SECTION 23: The products referred to in this Order are monitored with respect to the following points:

-- nature and freshness of products;
-- healthfulness of processing operations;
-- product packaging and transport conditions;
-- wholesomeness of ingredients used, particularly salt, colouring agents and condiments;
-- finished product standards.

SECTION 24: Processors or operators must allow Inspection Service officers to enter the parts of their establishments where products are processed, packaged or stored, as well as all sanitary facilities.

SECTION 25: Inspection is carried out by means of product sampling at any stage of processing. All sampling is carried out by inspection officers.

The minimum quantities which must be collected for satisfactory laboratory results, by type of product, are as follows:

Fresh or frozen fish: 2 kg per 10 product tons
Shrimp: 500 g per product ton
Molluscs: 100 g per 10 product kg
All dried fish: 2 kg per 10 product tons
Sterile preserves: A minimum of four cans per size daily. Five percent of the cans in lots under suspicion will be collected, with a minimum of 7 cans per lot.

Such sampling is performed free of charge and no payment is required. Sampling operations are conducted systematically for monitoring and inspection purposes.

The inspection officer is not required to reveal the results of analyses or observations made of samplings by the government inspection services.

All laboratory analyses ordered on samplings by the inspection officer are charged to the producers. In such an event, the products may not be marketed until the analysis results are known.

SECTION 26: The health inspection of the products referred to in this Order is conducted by the sworn officers of the Maritime and Lagoon Fisheries Branch.

Quality control at the marketing level remains subject to common law.

TITLE IV: INSPECTION CERTIFICATE

SECTION 27: Only those products referred to in this Order which have been subjected to a health inspection by the competent legal authorities may be imported, transported, offered for sale or sold.

SECTION 28: A certificate of health inspection and origin is issued to any product which is found to meet the health inspection requirements provided in this Order; this certificate constitutes the sole guarantee of government inspection.

This document is required for all fishing products imported to, exported from or circulating within the Ivory Coast.

It lists the origin and nature of a product, the French or scientific name of the fish, the net weight of the product, the number of packages, the date of health inspection, the shipping date and the destination.

Imported fish and other marine animals cannot be offered for consumption without this certificate of health or a valid equivalent issued by authorities recognized by the Ivory Coast.

This certificate is drawn in duplicate in accordance with the attached model. The original accompanies the product. For exported or imported products, it is the only legal document which may be used by the Customs Service to establish bill of lading documents. The copy remains in the files of the Fisheries Branch.

SECTION 29: The fixed tariff transit charges for imported and exported fish and other marine animals are as follows:

-- Certificate fee for entire lot of fish and marine animals submitted by a single importer or exporter: 500 Francs.

-- Fresh or refrigerated fish and other marine animals: 5 Francs per 100 kg or fraction thereof.

These charges are collected in accordance with the provisions of Section 109 of Implementation Order No. 63-328 of July 29, 1963, under Act No. 63-323 of July 25, 1963, relative to the health inspection of animals in the Republic of Ivory Coast.

<u>SECTION 30</u>: In the case of oysters, the health inspection certificate shall be valid for a period of 72 hours. Wholesomeness ceases to be guaranteed beyond this limit.

Live molluscs imported into the Ivory Coast and bearing a health inspection certificate issued more than 72 hours previously may be marketed only after spending a period of 8 days in uncontaminated ponds designated for this purpose.

TITLE V: PENALTIES - SANCTIONS

<u>SECTION 31</u>: Fishing products which are transported or displayed for sale without the health inspection certificates provided under Section 28 of this Order shall be seized.

<u>SECTION 32</u>: The officers of the Fisheries Branch and of the Veterinary Service are empowered to seize any fishing products which do not have a health inspection certificate.

<u>SECTION 33</u>: A certificate of seizure shall be issued to the owners of the confiscated lots.

<u>SECTION 34</u>: The seized products referred to in Section 27 shall be subject to examination by a qualified officer of the Fisheries Branch or the Veterinary Service.

Should such an examination prove the wholesomeness of these products, they shall be graciously turned over to a charitable organization and a receipt shall be issued to the seizing agency by that organization.

SECTION 35: Fishing products declared unfit for human consumption shall be treated as follows:

Fish declared slightly adulterated by the inspection officer shall be sold by the owner to fish processing plants or to a fish meal plant.

Fish and other marine animals declared highly tainted or toxic shall be destroyed by the inspection officer at the cost of the owner.

Only the officers empowered under Section 32 of this Order have the authority to decide on the destination of seized products.

The government shall be exempt from all claims and shall provide no compensation for such seizures, denaturation or destruction of fishing products.

SECTION 36: Persons offering for sale or selling fishing products not previously inspected and subsequently found unfit for human consumption shall be liable to the penalties provided under the Fraud Repression Act for persons displaying, offering for sale or selling fishing products for human consumption with the knowledge that such products are falsely represented, tainted or toxic.

SECTION 37: Infractions of this Order shall be punishable by the penalties provided under Section 22 of the Act No. 63-323 of July 25, 1963.

Persons in any way refusing or opposing the implementation of the health inspection measures provided under this Order or similarly hampering qualified officers in the exercise of their duties, acting under the provisions of these acts and regulations, shall be liable to the same penalties.

SECTION 38: In the case of a repeated offense or an infraction judged to be quite serious, a decision may be made to temporarily or permanently suspend the issue of health inspection certificates to the offender.

APPENDIX VIII (Cont'd)

SECTION 39: The Director of Fisheries and the Director of Veterinary Services are responsible, within their respective jurisdictions, for implementing this Order which shall be published in the Official Journal of the Republic.

Signed, sealed and delivered at Abidjan on June 17, 1976.

Dr. G. DICOH
Minister of Animal Food Production

APPENDIX IX

REPUBLIC OF IVORY COAST
MINISTRY OF ANIMAL FOOD PRODUCTION
MARITIME AND LAGOON FISHERIES BRANCH
LABORATORY

No: SAMPLE

HEALTH INSPECTION CERTIFICATE
Order No. 0031/Ministry of Animal Food Production
of June 17, 1976

Product origin:
Nature of product:
Name and address of exporter:

PRODUCT NAMES	NUMBER OF PACKAGES	NET WEIGHT

Name and address of importer:

Date of inspection:
Means of transportation;

It is hereby certified that the above-designated products have been found fit for human consumption in accordance with the conditions stipulated in the Order.

ABIDJAN, date:
LABORATORY CHIEF:

APPENDIX X

TARIFFS ON FISH AND FISH PRODUCTS IMPORTED INTO THE IVORY COAST AS OF FEBRUARY, 1980.

Tariff#	Product	Droit fiscal d'Entrée (%) (DFE)	Droit de douane (%) (DD)	Taxe à la Valeur Ajoutée (T.V.A.)*
16.04	Prepared/preserved incl. Caviar and its substitutes			
16.04.01	Caviar	35	10	T.V.O.**
16.04.02	"Poutargue" (mullet, "courbines, tuna eggs)	35	10	T.V.O.
16.04.09	Other prepared/preserved	35	10	T.V.O.
16.04.10	Freshwater	25	7	T.V.O.
16.04.21	Sardines - in boxes of "¼ CLUB", 30 mm in height & less	25	7	T.V.O.
	- other			
16.04.31	Sardinellas	25	7	T.V.O.
16.04.32	Mackerel	25	7	T.V.O.
16.04.33	Tuna	25	7	T.V.O.
16.04.39	Other	25	7	T.V.O.
16.05	Crustaceans and molluscs (incl. in the shell) prepared/preserved			
16.05.01	Lobsters	30	5	T.V.O.
16.05.02	Shrimp	30	5	T.V.O.
16.05.09	Other	30	5	T.V.O.
16.05.90	Molluscs, other	30	5	T.V.O.

APPENDIX X (Cont'd)

Tariff#	Product	Droit fiscal d'Entrée (%) (DFE)	Droit de douane (%) (DD)	Taxe à la Valeur Ajoutée (T.V.A.)*
03.01	Fresh (live or dead), frozen, chilled			
	Freshwater:			
03.01.01	Breeding Fish	0	0	0
03.01.09	Others	20	10	0
03.01.10	Tuna	5	10	0
03.01.20	Sardine	20	10	0
03.01.30	Sardinella	20	10	0
03.01.40	Mackerel	20	10	0
03.01.50	Sole	20	10	0
03.01.70	Others	20	10	0
03.02	Salted/Dried/Pickled in Brine/Smoked			
	Salted/Dried/Pickled:			
03.02.01	Freshwater	25	0	T.V.O.
03.02.02	Saltwater except 03.02.03	25	12	T.V.O.
03.02.03	Sharks fins, tails	10	0	T.V.O.
	Smoked:			
03.02.11	Freshwater	25	0	T.V.O.
03.02.12	Saltwater	25	12	T.V.O.
03.03	Crustaceans, molluscs in the shell (incl. separated from their carapace or shell) fresh/live or dead/chilled/frozen/dried/salted/pickled/boiled			

APPENDIX X (Cont'd)

Tariff#	Product	Droit fiscal d'Entrée (%) (DFE)	Droit de douane (%) (DD)	Taxe à la Valeur Ajoutée (T.V.A.)*
	Crustaceans:			
03.03.01	Shrimps	25	10	T.V.O.
03.03.02	Lobsters	25	10	T.V.O
03.03.09	Others	25	10	T.V.O.
03.03.19	Others (crayfish)	30	5	T.V.O.
	Molluscs & Shellfish:			
03.03.21	Oysters	30	5	T.V.O.
03.03.22	Mussels	30	5	T.V.O.
03.03.29	Others	30	5	T.V.O.
03.03.90	Others (snails)	30	5	T.V.O.

* T.V.A. is calculated on the value CIF Abidjan + DFE + DD

** T.V.O. taxe à la valeur ajoutée originelle, i.e. 23.4%

Source: Ministère du Commerce, Direction Générale des Douanes, February 1980.

APPENDIX XI

GENERAL DESCRIPTIVE DATA

Geographic Area: 324 000 km; 40% forest and woodland, 8% cultivated; 52% grazing, fallow and non-productive; 200 miles of lagoons and connecting canals along south coast.

Climate: Rainy Season - May to October - (tropical) cloudy, hot, humid, frequent showers.

Dry Season- November to April - sunny, warmer, less humid, breezy.

Population: 8 million, consisting of 5 million native, 2.85 million foreign (from Upper Volta, Mali, Guinea, Ghana), 100 000 Lebanese, 47 000 French.

Average annual population growth: 1.8% excluding immigrants
4% including immigrants

Language: French is official; over 60 native dialects.

Religion: 66% Animist, 22% Muslim, 12% Christian.

Literacy: About 65% at primary school level.

Labour force: Approximately 15% of labour force are wage earners, employed in agriculture, government, industry, professionals.

Organized labour: 23% of wage labour force.

Major cities:	Capital - Abidjan	1 200 000
	Yamoussoukro (central)	50 000
	Korlogo (north Central)	- --

APPENDIX XI (Cont'd)

Main exports: Coffee, cocoa, tropical wood.

Main imports: Capital equipment, semi-processed metals, transportation and construction equipment, paper products, textiles, chemicals.

Holidays: Traditional Western holidays and variable Christian or Muslim holidays and May 1, August 15, November 1, December 7.

Currency: CFA franc, common currency with Benin, Niger, Senegal, Togo and Upper Volta. Exchange rate officially guaranteed with France at 50 CFA franc = 1 French franc. Current rate of exchange with the Canadian dollar is 185 CFA franc = $1 Canadian (March 1980 average).

APPENDIX XII

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APPENDIX XII (Cont'd)

B. Business Contacts

M. Kouyate Madogne
Directeur du Commerce Extérieur
01 - BPV 143 Abidjan Tel: 32-58-76

M. Akabla Denis, Sous-Directeur
Ministère du Commerce, Direction du Commerce
Intérieur et de la Distribution B.V.P 142
Abidjan Tel: 32-76-34

M. Attoly Ebrie, Chef des Pêches Industrielles
M. Kamara Ladu, Chef des Pêches Artisanales
Direction des Pêches Maritimes et Lagunaires
B.P. no. U.19 Abidjan

M. Pierre Amida
Administrateur Délégué
S.O.C.E.F.
B.P. 4154 Abidjan
Tel: 35-54-42

M. Pierre Amida
Administrateur délégué
COFRAL (Compagnie du Froid Alimentaire)
08 P.B. 844 Abidjan 05
Telex 2415 Abj.

M. Daniel Carracosa
Directeur Général, P.E.C.I. (Pêche et Froid Côte d'Ivoire)
Siège Social, 01 B.P. 1518
Port de Pêche, Abidjan 01 Tel: 35-75-54 Telex: PECFROI ABIDJAN
35-60-75 2229

M. Michel Castanet
Vice Président
Syndicat Armateurs d'Abidjan
01 B.P. 14
Abidjan 01

M. Gra
SCODI (Société des Conserveries de Côte d'Ivoire)
Abidjan

M. Gaoussou D. Ouattara, Président
CAPA (Compagnie Africaine de Pêche Atlantique) et
SAPP (Société Anonyme des Pêcheries Pleven)
33,35 rue Pierre et Marie Curie, Zone 4
05 B.P 1474
Abidjan 05 Tel: 35-75-18 Telex: 2251-3486
35-22-43

Also reached in St. Malo, France
6 BD DE LA REPUBLIQUE
Tel: (99) 56-08-09 Telex 950303

Staff, Canadian Embassy
P.O. Box 4104
La Général Building
Cor. Avenue du Commerce et Bottreau - Roussel Plateau
Abidjan 01, Ivory Coast