

HD
9464
.G2A25
Annex
v.14c

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

NIGERIA



Government
of Canada

Gouvernement
du Canada

Fisheries
and Oceans

Pêches
et Océans

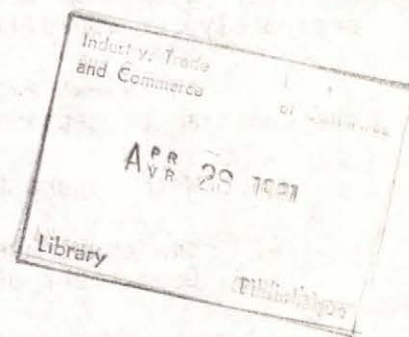
Industry, Trade
and Commerce

Industrie
et Commerce

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

DRAFT

Annex to the
Worldwide Fisheries Marketing Study:
Prospects to 1985



NIGERIA

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

M. Romoff
Canadian High Commission
Lagos

APRIL, 1980

ACKNOWLEDGEMENT

The preparation of the Worldwide Fisheries Marketing Study, of which this Report is a part, embodies many hours of work not only by the authors but also and more importantly by those who generously provided us with market information and advice.

Specifically, this Report would not have been possible without the cooperation and assistance of fishermen, processors, brokers, wholesalers, distributors, retailers, consumers and their organizations as well as government officials with whom we visited and interviewed. Though too numerous to mention separately, we would like to extend our sincere gratitude and appreciation.

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

With regard to the overall Study, we would like to acknowledge:

- the encouragement and guidance of G.C. Vernon and D.S. Puccini, Department of Fisheries and Oceans (DFO);
- the advice of K. Campbell, Fisheries Council of Canada; and J. Spitz, Fisheries Association of B.C.; and R. Bulmer, Canadian Association of Fish Exporters;
- the liaison work of C. Paquette, DFO;
- the cooperation of the Department of Industry, Trade and Commerce (IT&C);
- the dedication of the participants from various parts of the industry and government including officers at our diplomatic posts who formed the study teams;
- the analytical and editorial assistance of K. Hay and his staff at Economix International;
- the general assistance within DFO provided by the graphical services of the Communications Branch and the support services of A. Letellier and G. Routhier of the Marketing Services Branch.

To all of the above, we extend our thanks.

E. Wong
November, 1980

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
Economic Development Directorate
Fisheries Economic Development and Marketing
Department of Fisheries and Oceans
November 1980
Ottawa

NIGERIA

TABLE OF CONTENTS

	Page
A. INTRODUCTION	1
B. DEMAND	4
C. SUPPLY	6
1. Domestic Production.....	6
2. Imports.....	9
D. DEMAND/SUPPLY BALANCE	16
E. POTENTIAL TRADE	17
1. Market Potential for Canadian Exports.....	17
2. Market Entry Requirements and Barriers.....	22
F. CONCLUSIONS	26

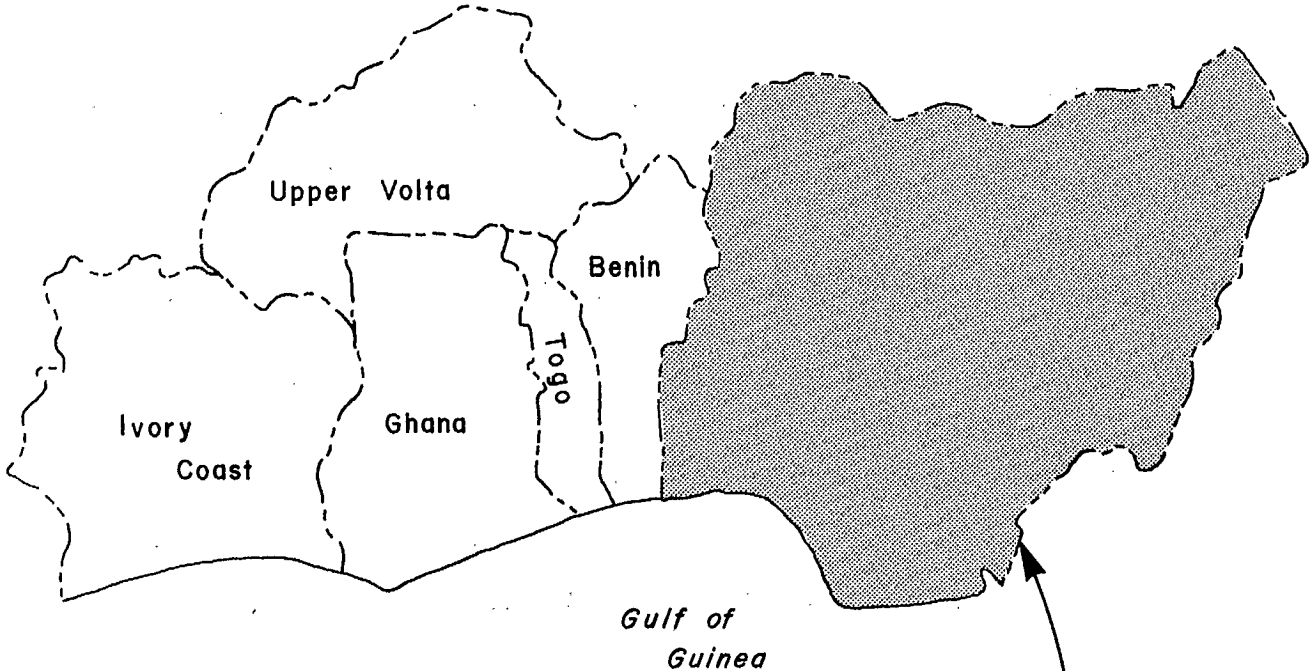
APPENDICES

I. Foreign Investment Policy	A-1
II. Import Control Provisions.....	A-2
III. Major Frozen Fish Importers.....	A-6
IV. Nigerian Exchange Control Act.....	A-9
V. Market Entry Requirements and Barriers.....	A-22
VI. Fish Production by Sectors.....	A-25
VII. Nominal Catches by Species.....	A-26
VIII. Imports by Selected Countries of Origin.....	A-27
IX. Imports by Product Form.....	A-38
X. Imports of Canned/Preserved Fish Products.....	A-43
XI. List of Importers' Names and Addresses.....	A-45
XII. Canadian Shipping Services to Nigeria.....	A-47

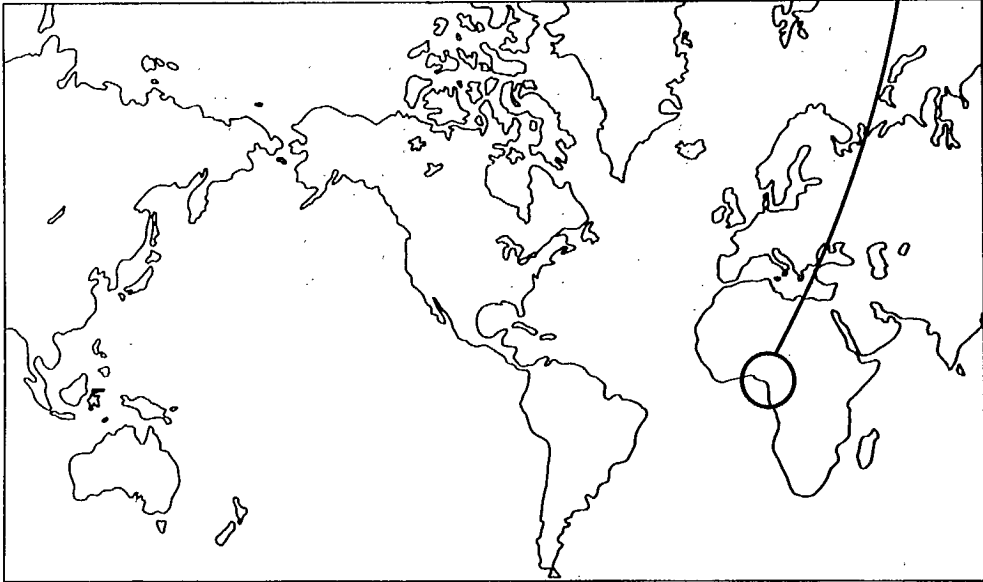
REFERENCES

A. Bibliography.....	A-48
B. Business Contacts.....	A-50

NIGERIA



INDEX MAP



A. INTRODUCTION

Nigeria exists as a huge and challenging market for suppliers of inexpensive frozen fish products, stockfish, canned fish, fishing gear and equipment, fisheries development expertise and cold storage equipment. It is a country that can also be examined seriously for potential investments in joint ventures.

It is the most populous country in Africa, with a population of approximately 80 million and, assuming a continuing growth rate of 2.5%, the prospect of reaching 100 million or more by the year 2000.

Nigeria has recently returned to a civilian government after 13 years of military rule, and thus far the atmosphere has remained relatively calm. Future government policies and the state of the economy will determine to a large extent the degree to which the current state of political stability continues.

The economy is sustained at present by revenues from Nigeria's substantial oil reserves. In fact, Nigeria may be depending too heavily upon its newly-acquired oil wealth. Officials of the World Bank, for example, say the economy must diversify because this dependence on petroleum as the "fuel" for development is precarious. Astute management of the economy over the next 25 years is seen as being essential to ensure stabilization and continued growth.

The new civilian government is continuing a program called "Operation Feed the Nation", started by the former military regime, which emphasizes increased food self-sufficiency. For various economic and social reasons, however, there has been a shift in population away from the country to the cities and industrial employment. As the population's education level rises it may become increasingly difficult to interest people in farming the land and fishing the waters.

Nigeria has been operating under a Third National Development Plan, introduced in April 1975 and extended to the end of December 1980. It had to be scaled down in 1976-77 when it became clear that revenue from petroleum

would not meet expectations. Under that plan, the nation's economy was expected to grow at 9.5% a year, with agricultural production increasing 5% a year and manufacturing at 18% a year. Actual performance was nowhere near these levels. The Nigerian economy in fact grew during this period at an average rate of just 6% a year, with virtually no growth at all in the agricultural sector. At the same time, average growth in manufacturing was 12% a year.

Inflation has been hurting disposable incomes in the past five years, with rates of 23.4% in 1976, 15.9% in 1977 and 16.6% in 1978. Proteins have increased in price by 68.3% overall since 1975, but in urban centres they rose by an even greater 96% between 1975 and 1978.

The government is now preparing Nigeria's Fourth National Development Plan, to come into effect in January, 1981. It is expected to concentrate on consolidating the nation's economic base and laying the foundation for long-term economic development, with emphasis on agriculture and education.

As for existing policies that concern exporters and prospective investors, Nigeria welcomes foreign capital, but there are government restrictions. In the fisheries sector, for example, fish and shrimp trawling and processing, and imported fish distribution firms must be owned at least 60% by Nigerians. And as of December, 1978, most other companies operating in the country must have at least 40% Nigerian participation.

The Nigerian unit of currency is the Naira, made up of 100 kobo. N1 = C\$2.15 (January 31, 1980).

Prospective exporters and investors should be warned that Nigeria can be a difficult place in which to do business. Infrastructure is inadequate in many respects, prices are high, and one can anticipate many frustrations. Overnight the operating environment can change if, for example, a government decision banning a product or placing it under licence drastically affects the sales potential. Decisions concerning tariff and duty schedules can be made without notice. The Central Bank has displayed a tendency to slow down the payment process, which can make it necessary to seek assistance in covering receivables.

Whenever possible, imports are curtailed to conserve foreign exchange. This policy is a significant factor that affects pricing, supply and demand for fish and fish products. At present, salted, dried and smoked fish are under import licence restrictions, and there are some restrictions as well on canned and preserved fish. Among the policies designed to restrain imports, a ceiling price has been imposed on frozen fish from foreign suppliers, which has the effect of limiting the market to lower-priced varieties and virtually prohibiting the entry of most medium and all high-priced species. But the demand is there. With tenacity, thorough research and the right connections, the market rewards can be substantial.

B. DEMAND

The Nigerian government has adopted as one of its goals to sustain and increase the availability of fishery products. Under its Third National Development Plan, it was hoped that fish consumption per capita would increase by 2.3 kilograms per annum and reach 19.4 kilograms by 1980. However, production has not come close to targets and the latest statistics available (1977) indicate per capita consumption of between 10.4 and 11.5 kilograms per annum.

Present demand for fish is estimated at 900 000 tonnes annually, and supplies fall short of meeting it by between 100 000 and 200 000 tonnes. This is due to a mixture of production failures, price controls, and import policies. Projections indicate the demand for fish could increase to 1.1 million or 1.3 million tonnes by 1990. Some exports suggest it could go as high as 1.5 million tonnes, and by the year 2000 could approach 2 million tonnes (see Table 1).

Domestic fish production is expanding, but in the short and medium term will not come close to supplying the country's protein needs. Thus a continuing and expanding market is potentially open to foreign suppliers, and Nigeria's recently-acquired oil wealth, if properly managed, will allow for sustained imports of fish products.

Price, of course, is a critical factor, and in the past high domestic prices have tended to limit both demand and supply. However, there are encouraging signs that the situation is improving, with more of the population able to afford the less expensive varieties of fish and fish products. Chief Michael Ibru of Ibru Seafoods Limited, Nigeria's largest importer of frozen fish, says the product is now within the reach of the daily wage earner. "In

fact, the normal price today of half a kg of frozen fish (average household daily requirement) represents only 10% of the minimum daily wage, as against about 80% when we first started". This reflects the rapid rise in real incomes of many Nigerians in recent years.

TABLE 1
Nigeria Demand for Round Fish

<u>Year</u>	<u>Population</u>	<u>Per capita annual consumption kg</u>	<u>Total fish demand in tonnes</u>
1980	80 million	10.4	806 000
		11.5	891 250
		13.8	1 069 500
1990	95 million	10.4	988 000
		11.5	1 092 500
		13.8	1 311 000
		19.4	1 843 000
2000	110 million	10.4	1 144 000
		11.5	1 265 000
		13.8	1 518 000
		19.4	2 134 000

Assumptions: Population growth rate of 2.5%.

Total demand based on increase in population only.

10.4 kg low estimate 1977 consumption per capita.

11.5 kg high estimate 1977 consumption per capita.

13.8 kg per capita consumption increase of 20% over 1977 high estimate.

19.4 kg consumption goal set in Third National Development Plan.

Calculations for the years 1990 and 2000 would change upwards significantly if one assumes that the annual rate of growth of private consumption expenditures is healthy. This is difficult to include, however, since one must then consider availability and prices of substitute goods. These data are uncertain.

C. SUPPLY

1. Domestic Production

Domestic fisheries production currently accounts for roughly 62% of total fish supplies (see Table 2). The Nigerian fishing industry comprises two main sectors: the artisanal sector and the coastal industrial sector. Table 3 gives statistics on 1979 fleet sizes. The artisanal sector, made up of individual fishermen operating with canoes in coastal waters, brackish water near the coast, interior rivers, and lakes and ponds, has been responsible for over 97% of domestic production since 1974 (see Appendix VI). Of the total annual catch, around 60% is freshwater fish. Catch statistics by species for the years 1973-1978 inclusive are shown in Appendix VII.

Although Nigeria's artisanal sector is attempting to increase its capability mainly through technical improvements to vessels and introduction of better catching methods, it is not expected to contribute significantly more to total supplies, at least in the foreseeable future.

The coastal trawling fleet, which in the past has made a minor contribution to supply, is being enlarged and upgraded. Wales Seafoods Limited of Lagos, for example, purchased six freezer stern trawlers in the United Kingdom in the fall of 1979 to enable it to fish horse mackerel off West Africa.

TABLE 2

Nigeria Fish Production 1974-1978
(tonnes)

	<u>1974</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>
Domestic fish production	473 290	478 216	494 769	502 185	516 865
Imports	<u>99 386</u>	<u>292 323</u>	<u>300 039</u>	<u>304 339</u>	<u>N/A</u>
Total supply	572 676	770 939	794 808	806 524	N/A
Domestic production as a % of total supply	83%	62%	62%	62%	
Imports as a % of total supply	17%	38%	38%	38%	

Source: Nigeria, Federal Department of Fisheries.

TABLE 3

Nigeria Domestic Fleet Size 1979

Artisanal Sector

133 000 dug-out canoes - approximately 5% motorized.

Coastal Industrial Sector

71 Trawlers ranging 15 to 25 metres in length.

Source: Nigeria, Federal Department of Fisheries.

The Nigerian National Fishing Company (NNFC) and Norway recently signed a contract to deliver two large fishing vessels in July 1980 and four in November 1980. Nigerian trawlers must fish off the Gulf of Guinea for offshore stocks because the coastal inshore stocks are heavily fished, and what remains is difficult to harvest and less commercially attractive. Purchases of vessels should enable Nigerians to catch larger quantities of the pelagic and small pelagic species, such as mackerel, horse mackerel and sardinellas.

The government's attempt to encourage growth in its coastal trawling fleet through the establishment of NNFC on a 70/30 equity basis with Akers Trading Company Limited of Norway has not been as successful as was hoped. This N23 million venture was expected to land and distribute about 60 000 tonnes of fish annually. As with many business ventures undertaken in Nigeria, much time is needed to achieve meaningful results. For example, the aforementioned six freezer stern trawlers have not yet been productive since their motors cannot operate in the hot Nigerian climate.

Several of the problems in Nigeria's fishing sector, identified in the Third National Development Plan, still exist. These include:

- (i) inadequate supply of inputs;
- (ii) inadequacy of capital for fisheries development;
- (iii) shortage of trained manpower at various levels;
- (iv) poor communications network in the production area; and
- (v) lack of effective organization among fishermen in the artisanal sector.

The Nigerian government is attempting to improve fishing terminals and other infrastructure facilities. Canadian, Norwegian and other foreign firms have made proposals to build processing plants and the government is very interested in these projects.

At present, nine states are beneficiaries under the National Fish Production Project (NAFPP) program for acquiring boats, outboard engines, modern fishing nets and gear, which are made available at subsidized prices. Quantities of fishing implements and accessories distributed up to 1978 under NAFPP are shown in Table 4.

TABLE 4
Quantity of Fishing Implements and Accessories
Distributed Under NAFPP - Nigeria

	<u>Cumulative to 1978</u>	<u>Estimated supplies in 1978</u>
Twine (spools)	36 023	28 273
Nets	2 847	1 763
Hooks	407 900	407 900
Indicator buoys	15 930	5 930
Rope (bundles)	722 958	720 772
Flats	531 140	508 390
Outboard engines	656	165

Source: Nigeria, Federal Department of Fisheries

Despite all attempts to keep capital costs down, Nigeria remains a high-cost domestic producer, due mainly to policies on exchange rates and, to a lesser extent, tariffs. When considering source of supply, it is still cheaper to import in most instances than to build capacity to produce domestically.

In the fish farming sector, the "Operation Feed the Nation" program has made it possible for fishermen and co-operatives to purchase inputs at a 50% subsidy. Nigeria is attempting to build up aquaculture operations, but it has been suggested that conditions in the country are not entirely conducive to fish farming on a large scale.

2. Imports

a) Production from Distant Water Chartered Vessels

This category consists of fish caught and landed by foreign vessels chartered by Nigerian companies.

Although included with imports, only half the duty (not including a 5% port surcharge) that a regular importer would pay, is charged. Only up to 60% of the value of the fish can, however, be released as foreign exchange. The majority of these arrangements are joint ventures between Nigerians and foreigners such as Indians, Bulgarians, Poles, Japanese and Russians. Since 1968, this category has constituted the largest group of imports. It now accounts for over 40% of total fish imports, as shown in Table 5. (Fish imported under this category is usually frozen at sea in blocks).

The Central Bank of Nigeria has imposed a ceiling price of N246 (C\$530) per tonne on frozen fish imports. However, importers are allowed to mix species of varying prices to arrive at an average price per shipment that is not greater than the government ceiling price. It is expected that a ceiling price at this level will be in place for some time. Thus, Nigeria will continue to be a market primarily for the low-value species such as frozen mackerel and horse mackerel.

A major fisheries supplier to Nigeria is the Soviet Union. The USSR and its trading arm, Sovhispan SA of Las Palmas (a joint venture with Spain), are the market's price leaders. But this situation will probably not continue, as each year since the inception of the 200-mile limit, the ability of the Soviet fleet to reach desired catch levels has declined. The coastal countries off which the USSR has enjoyed free access in the past, such as Namibia, are setting catch levels in their 200 mile zones and enforcing them.

Catches of mackerel in the Northwest Atlantic, CECAF (East Central Atlantic) and the North Sea areas were down substantially in 1978. The SEACF (South East Atlantic) catches of horse mackerel helped out in 1978. As of 1980, however, total allowable catches (TAC) have been set for fishing in these areas

TABLE 5

Nigerian Fish Imports
(tonnes)

	<u>1965</u>	<u>1966</u>	<u>1967</u>	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>	<u>1974</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>
Fish (fresh, chilled or frozen)	3 881	5 288	749	351	144	1 110	3 086	11 014	1 728	7 344 7%	7 696 3%	25 426 8%	25 808 8%	n.a.
Fish (salted, dried or smoked)	1 143	1 980	2 074	477	2 687	1 538	2 348	947	1 855	803 1%	491 0%	841 1%	853 1%	n.a.
Canned fish (sardine & others preserved fish)	3 311	15 557	1 998	1 488	1 568	1 264	3 776	7 885	8 984	4 121 1%	77 857 26%	46 934 16%	47 638 16%	n.a.
Stock fish	188 184	181 425	122 599	32 864	4 022	28 589	11 641	13 000	23 861	12 211 13%	92 464 32%	101 956 34%	103 486 34%	n.a.
Distant water vessel landings	-	-	-	14 040	21 614	34 014	54 416	65 074	71 411	74 907 75%	113 814 39%	124 879 42%	126 753 42%	202 208
TOTAL	196 519	190 250	127 420	49 220	30 035	66 515	75 267	97 930	107 839	99 386	292 323	300 039	304 339	n.a.

Source: Nigeria Federal Department of Fisheries.

*Percentage figures are percent of totals for any given year.

and catches for the USSR are again expected to decline.

TABLE 6

Mackerel and Horse Mackerel TACs set by SEAFC for 1980

	<u>Chub Mackerel TAC off Namibia (tonnes)</u>	<u>Horse Mackerel TAC off Namibia (tonnes)</u>
1980	500 000	200 000

Source: Eurofish Report, January 23, 1980, p. BB/3.

These TACs equal the total USSR catch in 1978, which was around 33.3% of the total catch in these areas in that year.

As for the North Sea and western stock supplies, mackerel TACs are again reduced for 1980.

TABLE 7

North Sea and Western Mackerel Catches and TACs 1978-1980
(tonnes)

<u>Area</u>	<u>Catches 1978</u>	<u>TAC 1979</u>	<u>TAC 1980</u>
North Sea	154 000	145 000	55 500
Western Stock	660 000	435 000 (catch of 507 000)	350 000
Total	814 000	580 000	405 500

Sources: European Supplies Bulletin #2, 1979.
J. Beckett, Dept. of Fisheries and Oceans, Ottawa.
Eurofish Report, January 23, 1980.

The USSR is expected to try to maintain its position as prime Nigerian supplier and price setter, but this objective will probably become increasingly difficult to achieve. Much depends on the extent to which new stocks are found, their rates of exploitation, the extent to which present stocks are restricted, and the ability of the Soviets to obtain cheap supplies through direct or over-the-side sales agreements.

For the period January to September 1979, the UK sold over 180 000 tonnes of fresh/chilled mackerel, 54% of it going to the Soviet Union. The average price for these British sales was C\$222 (N 103.25) per tonne. Much of this fish later found its way into Nigeria in a frozen state. During the same period the UK sold close to 50 000 tonnes of frozen mackerel directly to Nigeria at an average price of around C\$440 per tonne (N204.65).

b) Imports from Foreign Sources

Overall Nigerian fisheries imports increased more than three-fold between 1974 and 1977. They now account for nearly 40% of total supply (see Table 2). All categories of fish imports with the exception of salted, dried or smoked fish have grown substantially since 1974, as shown in Table 5. Sales of smoked, salted and dried fish were never large but have declined due to the substitution of frozen and preserved fish and the impact of import licence restrictions.

Imports from Denmark, France, West Germany, Iceland, the Netherlands, Norway, Portugal, Spain, Japan and the USA for 1977 and 1978 are shown in Appendix VIII. Imports by product form for all of the previously listed countries (excluding Portugal and Spain for 1978) are presented in Appendix IX. The imports of fishery products, by category, is described below.

(1) Fishery Products: fresh, chilled or frozen

The latest import figures for this category are for 1977. These show close to 26 000 tonnes were imported (see Table 5). It is believed that most of these fish products come into Nigeria frozen, under import category C, paying the highest level of duty.

Importers who handle a variety of foodstuffs may also be bringing in small quantities from surrounding African countries such as Senegal and Mauritania. Lower transportation costs could allow them to keep prices competitive with charter shippers.

Fresh, chilled or frozen imports include local West African species, such as catfish, sea bream and croaker: and a variety of "foreign" species, such as mackerel (fresh/chilled), salmon, trout, sardines, squid, sprats, plaice, saltfish, halibut, and raw/battered/breaded fillets. Crustaceans and molluscs imported fresh, chilled or frozen enter free of duty if caught and landed by canoes, or by vessels owned or chartered by Nigerians, or vessels owned by or operated for Nigerian registered companies. All other imports of crustaceans and molluscs enter at 15% duty.

Although fresh, frozen or chilled fish account for no more than 8% of total imports in any year since 1970, it is growing, and offers very interesting prospects for the future as cold storage facilities spread within Nigeria.

(2) Fishery Products: salted, dried or smoked

This category is insignificant (see Table 5) and its position is not expected to change as these products are under import licence restriction. Also, although much fish is consumed smoked, it is smoked locally. Salted fish is not popular. The import tariff is 25% of the value of the goods upon point of entry.

(3) Fishery Products: canned or preserved

According to United Nations trade statistics, Nigeria is the world's seventh largest importer of canned and preserved fish, in spite of government restrictions that brought about a decline in sales from 25% in 1975 to just over 15% of total imports in 1976 and 1977. Imports in 1977, as counted by the Nigerian Department of Fisheries, totalled 47 638 tonnes (see Table 5). However, unofficial figures gathered elsewhere show a minimum of nearly 54 000 tonnes, and by 1978 confirmed sales were 63 650 tonnes, excluding imports from Spain and Portugal, which could push the actual figure to nearly 80 000 tonnes. So even though canned and preserved fish appear to some extent to have fallen victim to official restrictions, there is still a substantial market and healthy demand.

Statistics presented in Appendix X indicate that major items sold in Nigeria are canned mackerel and sardines, the cheapest varieties available. The market has also obviously developed a taste for canned fish prepared in tomato sauce. Main suppliers of these lines in the past have been Spain and Japan, which accounted for close to 99% of such mackerel and sardine purchases in both 1977 and 1978. Price, location of the vendor and buying habits are seen as major factors at the consumer level. Nigerians are also described as highly brand loyal. Bright colours such as those seen on the red Geisha label of Japanese products help to establish product and brand name identification.

In the supermarkets, which cater to a very small, elite population, a variety of canned and preserved fish products is available, including canned UK salmon, Danish herring, Danish shrimp and Japanese tuna. These supermarkets undertake their own buying. Prices are roughly two to three times the Canadian price for the equivalent product. A 400 gram can of pink salmon was roughly C\$5.40. In the past, the government importing firm, the Nigerian National Supply Company, has purchased canned sardines in large quantities. Although NNSC has not purchased recently, it may possibly return to purchasing canned sardines and/or mackerel in 1980-1981.

Sardines are treated under a separate tariff classification and all sardine imports are charged a 10% duty, as are other types of prepared and preserved fish.

(4) Fishery Products: Stockfish

Before 1969, stockfish constituted almost all of Nigeria's fish imports, but in recent years this has fallen to just over 33%. Stockfish imported into Nigeria must be of good quality but need not be of the highest quality. The tariff rate applied is 30% of the value of the fish on point of entry.

The latest import figures, for 1977, show more than 100 000 tonnes of stockfish imported (see Table 5). If one calculates that one tonne of stockfish has the same nutritional value as four tonnes of fresh fish, Nigeria purchases the nutritional equivalent of over 400 000 tonnes of fresh fish. Moreover,

these purchases are estimated to be much lower than total potential demand.

Stockfish is usually cod, which is air dried and baled in 45 kilogram weights. This fish is highly suited to the Nigerian climate since in its dehydrated state, it is shelf-stable, easily portable and low in weight. The government has recently removed import restrictions on stockfish since supplies are low. Purchases can be made by any approved importer. Sales prospects for 1980 are excellent.

Traditionally, Nigeria has purchased stockfish from several sources. The main suppliers have usually been Norway (whose sales were handled in 1979 by a Swiss firm) and Iceland. Japan is also said to be interested in this trade. Any interested supplier should provide pertinent data, and provide samples. A promotional package should also be considered by prospective Canadian suppliers.

Nigerian consumers prefer big stockfish. As stockfish is 85% dehydrated, the fresh fish used should be very large. Hake, haddock and pollock have been tried as a substitute for cod, but were not well accepted. A cheaper type of stock fish known as gadidae (mainly smaller cod) is entering from Norway in large quantities. Its average price per tonne in 1978 was C\$1 980 (N921) as compared to just over C\$3 000 (N1 395) for haddock and pollock, and as much as C\$4 250 (N1 976) per tonne average price for cod.

Consumer preferences do, however, vary by region for both type and brand. The current price paid quoted to the study team, was close to C\$6 (N 2.74) per kilogram. This would make the purchase price of stockfish competitive with that of frozen mackerel. As yet, a maximum price mechanism that limits the price an importer can pay has not been instituted.

In the January 23, 1980 issue of Eurofish Report, mention is made of the signing of a joint venture agreement to construct a smoking and drying plant for stockfish in Nigeria. No further details are available at this time.

D. DEMAND/SUPPLY BALANCE

Nigeria's population and standard of living are rising and the government is actively promoting increased consumption of fishery products. Domestic production is not able to keep up with demand. Since 1974, the proportion of the total supply of fishery products supplied by domestic production has fallen from 83% to 62% (see Table 2).

In spite of government efforts to encourage growth in the coastal trawling fleet, this situation will probably continue to at least 1985, providing substantial opportunities for importers, particularly those prepared to participate in joint ventures. In 1977, Nigeria imported over 800 000 tonnes of fishery products. The growth in imports will be limited by application of tariffs, pricing controls, and quota licensing. This framework of regulation is intended to moderate the potential rapid build up of importers for two reasons. First, Nigeria wishes to become more self-reliant in fisheries and other protein production. Second, there is still a foreign exchange constraint even though Nigeria has substantial oil revenues.

Nevertheless, there is bound to be growth in demand arising from a growing population and increasing incomes. A declining share of this domestic demand is expected to be met from local sources, leaving sizeable opportunities for foreign sellers.

E. POTENTIAL TRADE

1. Market Potential for Canadian Exports

a) Mackerel

Canadian catches of mackerel more than doubled in quantity between 1975 and 1979. Last year, East coast catches approached 30 000 tonnes, round weight. Over 7 000 additional tonnes were sold over-the-side to Ribno Stopanstvo of Bulgaria and Joint Trawlers Limited. Canada exported 4 700 tonnes, product weight, of frozen whole mackerel in 1979.

Scientific experts calculate that Canada can take five to six times the present catch rate without harming the stocks. Catches of this size would allow Canadians to talk seriously to the Nigerians about supplying their market with large quantities of mackerel on a regular basis.

Accompanying this prospect, however, are a number of cautions. Atlantic mackerel is a transboundary stock and is not governed by a total allowable catch (TAC). In the absence of a long-term, final agreement with the USA on east coast fishing, the number of mackerel available to Canadian boats may not reach very high levels. This could be particularly the case if the USA becomes interested in mackerel industrially, more than as a recreational fishery. Also the species behaviour can be unpredictable.

Freezing capacities for large quantities of mackerel may not now be available in Canada. Processors, then, would have to balance the necessary increased capital and operating investment in storage capacity for lower-value species, against anticipated revenues from sales of these frozen fish in the Nigerian and other markets.

It would appear worthwhile for any potential supplier of frozen fish to also explore the Las Palmas and UK market connections, since deals are normally concluded in these locations, and sources there can provide expert advice on transport and shipping.

As for canned products, they will probably be available but price will be the critical factor in any sale.

b) Stockfish

Stockfish is not produced at present, but interest is being shown by some Newfoundland processors. Pilot projects could begin in 1980-81. Certainly there will be adequate supplies of cod. But whether the Canadian cod is large enough to suit the tastes of Nigerian consumers is something that will have to be evaluated. On the other hand, the Nigerian market does not demand high quality stockfish, and the investment needed to develop this fishery is relatively small. The critical element is a proper drying climate, and there is reason to believe some areas of Newfoundland are suitable.

c) Joint Venture in the Nigerian Shrimp Industry

Although Nigerian coastal waters are not rich in other stocks, the country is blessed with a healthy supply of shrimp. The government has, therefore, allowed foreigners to invest in the development of a shrimp export industry to earn foreign exchange. At present, the Nigerian National Shrimp Company (NNSC), --established by the government as a joint USA-Nigeria export venture--, is experiencing difficulties. The foreign partner was expected to pull out as of July 1, 1980 and it is in the context of a Canadian investment opportunity (with particular interest in its backhaul capacity) that this discussion is included.

Nigeria's shrimp production for the years 1974-1978 was as follows:

TABLE 8

Nigeria Shrimp Production, 1974-1978
(tonnes)

<u>1974</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>
2 077	2 115	6 953	7 058	9 680

Source: Nigeria, Federal Department of Fisheries.

Approximately 60 trawlers ranging from 15 to 25 metres in length trawl for fish and shrimp on the continental shelf. In addition, around 30 shrimp trawlers of 100 to 180 gross tonnage are licenced for shrimping. These boats are owned by Nigerian companies, some of them with overseas partners.

The species caught in Nigeria is Penaeus duorarum, the same species of pink shrimp found in the Tortugas off south Florida, the Campeche grounds off Mexico, and the area off the Guianas on the northeastern shoulder of South America.

By law, any fish landed by shrimp trawlers must not be less than 75% by weight of the total landings including the head-on weight of the total landings including the head-on weight of the shrimp landed. This is to prevent the dumping of edible and marketable fish at sea by operators licenced to fish in territorial waters off Nigeria (Sea Fisheries Decree, Section 4(1)).

The Nigerian National Shrimp Company was established in 1975 as a joint venture between the Nigerian government and a foreign firm. The initial five-year contract expired in June 1980, and its renewal has not yet been determined. The Nigerian government, Nigeria Federal Development Bank, Nigeria Bank of Commerce and Bendel State government hold 65% equity, and the USA firm holds 35%. Initial investment by the American partner was estimated at N 630 000 (roughly US \$1 million in 1975 dollars). The firm was to be managed by the USA partner, and the latter was to have a monopoly on the company's shrimp exports.

This arrangement has not worked out entirely satisfactorily. First, the company was sold technology perhaps far more sophisticated than was necessary. Differences arose over management. Nigeria also was dissatisfied with the marketing arrangements, since it had little say in the control of costs and product mix. The firm did not begin fishing until 1977, was not in full operation until 1978, and has yet to export shrimp.

The shrimp company owns 16 trawlers, each 75 feet long, supplied by Bender Shipbuilding of Mobile, Alabama. In the opinion of one learned Nigerian these boats were not the most suitable for operation in Nigerian waters. The company is expected to purchase up to 24 additional vessels, and would prefer to buy a fleet of smaller ships, either steel, wood, or fibreglass, that would go to sea for five or six days and be less difficult to operate and maintain. Spare parts are a notorious problem. At present, only eight of the 16 trawlers are operating, while the remaining eight are awaiting parts. Catch rates for the April-September 1980 season are one-half to one tonne per vessel per month, far below the planned three to four tonnes per vessel. The fishing grounds are only 40 kilometres away. Each trip lasts up to 30 days, with a normal trip to the shrimping grounds and back lasting 18-21 days.

Small shrimp make up 80% of the catch, and are frozen on board and packed in two-kilogram cartons (headless, shell-on). Large shrimp are frozen at sea, placed in nylon net sacks, graded on shore and hand peeled to process IQF or IQF fantail. Other species such as grunts, croakers and barracuda are caught, frozen and sold locally at market prices. By-catch is as follows:

off-season (Oct.-Mar.)	10% shrimp
	90% other
in-season (Apr.-Sept.)	25% shrimp
	75% other

In Nigeria, the consumer prefers shell-on shrimp. Retail mark-up averages 100%. The Nigerian consumer is paying over N25 for a two-kilogram carton of 16 to 20 shrimps, or close to C\$12 per pound.

The company has topnotch facilities, including good plate freezing equipment and ample freezer capacity. It might be possible to incorporate facilities to cook the shrimp, which would add to its shelf life and extend processing and marketing possibilities.

Under the Lomé Convention, for example, canned, processed fish products imported from African countries party to the convention are given preferential treatment by countries of the European Economic Community (EEC). Therefore, Nigeria's shrimp industry may offer opportunity for Canadian investment through a possible joint venture in the Nigerian National Shrimp Company. The possibility of Nigerian shrimp as partial backhaul may also be worth exploring for direct shippers of Canadian frozen fish.

d) Other Investment Opportunities

As noted in an earlier section, Nigeria has problems with inadequate fishing terminals and other facilities that make up the industry's infrastructure. The government is entertaining proposals from foreign firms, including Canadian and Norwegian ones, to build processing plants.

Foreign investment is welcome in Nigeria, but conditions are not always optimal. As of December 31, 1978, all companies in the country must have a minimum of 40% Nigerian participation. Fish and shrimp trawling and processing, and imported fish distribution firms, require at least 60% Nigerian ownership.

Nonetheless, if one wishes to invest in a joint venture, it is possible to establish one relatively quickly and to operate it successfully. Entrepreneurs should understand, though, that it is important to have a Nigerian partner who is astute and well connected.

If one wishes to export only, without setting up a business in Nigeria, a personal meeting with fish importers is recommended. And since virtually all frozen fish deals are signed outside Nigeria, it is well to establish a connection in Las Palmas or to work through agents in the UK or elsewhere.

2. Market Entry Requirements and Barriers

a) Distribution

Most of Nigeria's domestic catch is sold fresh or smoked in open air markets where few standards of quality control are possible. Frozen fish enters through Lagos and Port Harcourt and is distributed to smaller interior cold storage depots by truck. Most imported canned fish and stockfish is sold in open air markets. (See Chart I for distribution network and Appendix V for a more complete description of distribution channels).

b) Transportation

Transportation for all fish products from Canada is available from at least seven shipping lines (see Appendix XII).

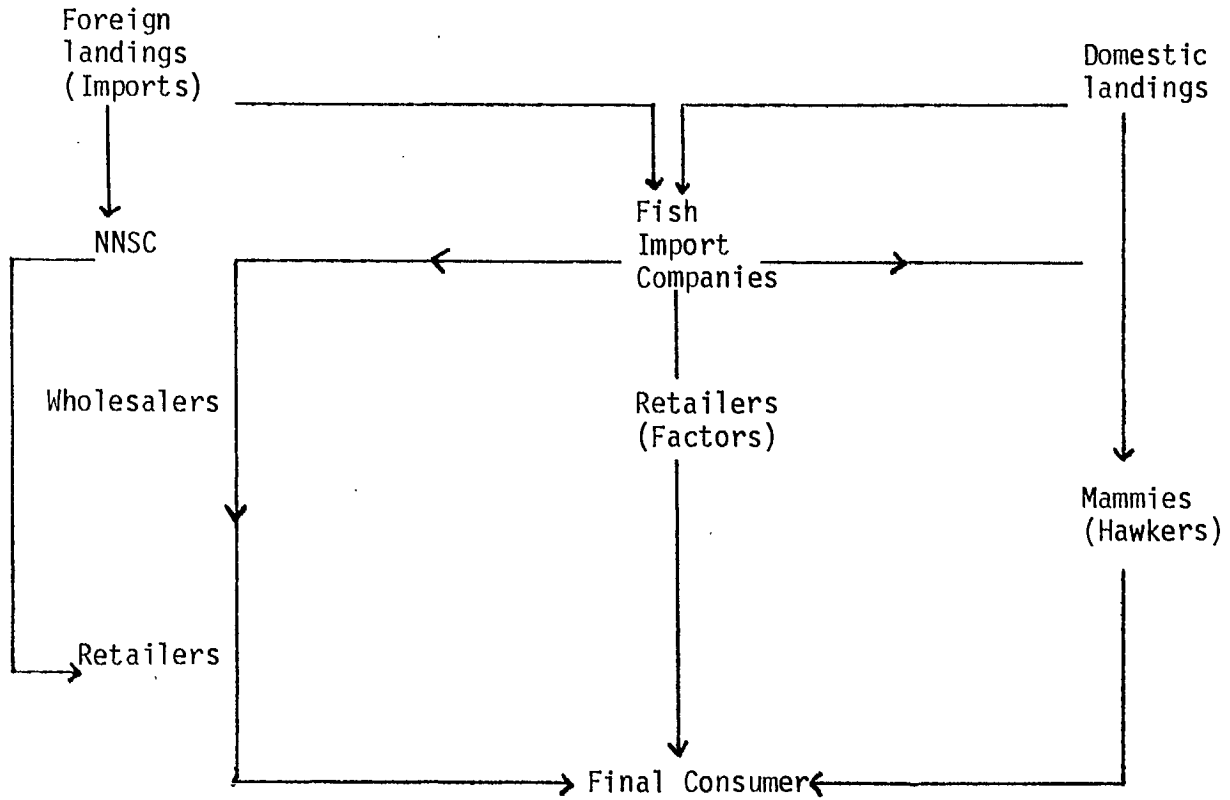
c) Pricing

The cost to an importer, although controlled by the Nigerian government through its maximum price scheme, will likely be affected more by the price set by the USSR and its trading arm, Sovhispan S.A. (see Appendix V). Prices for frozen mackerel are shown in Table 9.

d) Packaging

Packaging appears to be a major problem for all suppliers of frozen fish, regardless of country of origin. Canadian boxes could be improved. They are difficult to stack and closed with strapping tape which quickly loses its adhesive qualities in the tropical heat.

CHART I
Distribution Network for Fish in Nigeria



If one wishes to ship fish direct to Lagos, the crippling port congestion problem of three or four years ago has disappeared, through port facility expansion. The rainy season (April-October) tends to slow down services, but operations are quite sophisticated and efficient. Pilferage remains a problem.

TABLE 9

Prices for Frozen Round Mackerel, as of February 20, 1980 - Nigeria

Distribution Point

Supplier to importer	(Actual price, aver. 1979, C\$400-\$440 /tonne Maximum price set by government US\$610 /tonne)			
	<u>UFC</u>	<u>T-C</u>	<u>IBRU</u>	<u>GLOBEFISH</u>
Importer-Wholesaler (local)	N 8 (20 kg)	N 7.50 (20 kg)	N 10 (30 kg)	N 12 (30 kg)
Wholesaler - Local Distributor	N10	N10	N14-15	N16
Local Distribution - Retail	N11-13	N11-13	N16.50 -18	n/a

Commission on a local sale is approximately 5%.

The Nigerian consumer prefers large, thick fish with a reasonably high fat content (around 20%). Fish 25 to 30 cm in length and up (counting head, but not tail) fetch the best market price. If small in size, price will drop at retail by 20 to 25%.

e) Regulations and Restrictions

The annual Import Prohibition Order has been issued usually on April 1 of each year (although this will be changed to January 1 as of 1981). It is at this time that the government announces what products are to be restricted or banned. As noted previously, though, there can also be decisions made without notice concerning tariffs and duties.

All goods valued at 10 000 Naira (N 10 000 or C\$21 500 as of January 31, 1980) and above must be pre-inspected at the seller's expenses before entering Nigeria. It is important that all the necessary forms be completed in the number of copies required to ensure a product's ease of entry. Sellers are advised to use irrevocable letters of credit and to check the references of parties with whom they are doing business in Nigeria.

The tariff schedule includes charges that are both ad valorem and specific by weight, and it is easier on charter arrangements than on straight imports if one considers only the duty paid. On the other hand, if fish is imported on a charter up to only 60% of the value of the landed fish is released as foreign exchange. The remaining 40% or more must remain in Nigeria for re-investment. On strict imports, 100% of foreign exchange is allowed.

The above is only a brief outline of some of the market entry requirements and barriers. More details can be found in Appendices I, II, IV and V.

F. CONCLUSIONS

1. Nigeria has a population of approximately 80 million, with prospects of reaching 100 million or more by the year 2000 (assuming that the growth rate continues at 2.5%).
2. This most populous of African countries exists as a huge and challenging market for suppliers of inexpensive frozen fish products, stockfish, canned fish, fishing gear and equipment, fisheries development expertise and cold storage equipment.
3. A declared goal of the Nigerian government is to increase the available supply of fish and fish products, but domestic production has fallen well short of targets and, while expanding, is not expected to come even close to supplying the country's protein needs in the short and medium term.
4. Fish consumption per capita is estimated at between 10.4 and 11.5 kilograms per year. Present demand for fish is estimated at 900 000 tonnes annually, and could reach as high as 2 million tonnes by the year 2000. At present, available supplies fall short of meeting demand by 100 000 to 200 000 tonnes per year.
5. Prospects point to a continuing and expanding market potentially open to foreign suppliers and Nigeria's recently-acquired oil wealth, if properly managed, should allow for sustained imports of fish products.
6. Clouds on the country's economic horizon include too much reliance on petroleum revenues, according to the World Bank. It says the oil-based economy is precarious, and astute management is needed over the next 25 years to ensure stabilization and growth.
7. Foreign investment is welcome, but conditions are not always optimal. All companies must have a minimum of 40% Nigerian participation. Fish and shrimp trawling and processing, and imported fish distribution firms require at least 60% Nigerian ownership. Potential investors might seriously consider joint ventures with Nigerian interests. The country's shrimp industry in particular offers immediate possibilities.

8. Domestic production accounts for more than 60% of current fish supplies, and 97% of this comes from the artisanal fishery. Efforts are being made to upgrade the industry, but it is plagued with problems that are not expected to be resolved in the short or medium term. Even if the country could derive maximum value from its fish resources, it would still not have sufficient protein to feed the population at current consumption rates.

9. Among imports, canned and preserved fish have been placed under restriction in the past and may be in the future. Nonetheless, United Nations trade figures show Nigeria as the seventh largest importer (by value) of canned/preserved fish in the world. Spain and Japan are major suppliers. Mackerel and sardines/pilchards, boiled in water and canned in tomato sauce, are the big sellers (and the most reasonably priced). More expensive items such as British canned salmon are available in supermarkets, but are within reach only of the elite. Price, then, is a critical factor in supplying this market. So is labelling, which should be colourful and attractive. All packages must be marked in metric sizes.

10. Stockfish, in its dryweight state, accounted for nearly 100% of Nigeria's imports prior to 1969, but since 1975 it has held at around one-third. As of April, 1980, stockfish is purchased under licence by any authorized importer. A sales approach to any Nigerian importer should include samples and promotional material. Supplies at present come primarily from Norway through an agent in Switzerland, and from Iceland.

11. Frozen fish is the fastest growing import, now estimated at 300 000 tonnes annually. The government has imposed a ceiling price on frozen fish of US\$610 per tonne, which must include all costs. However, the Soviet Union is in fact the price leader. Through its joint venture with Spain in Sovhispan SA of Las Palmas, the USSR sells much of the frozen fish moving into West Africa. The lower-value species, such as mackerel and horse mackerel, make up the bulk of frozen fish imports.

12. Nigerian consumers prefer large, thick, whole fish (25 cm and up) with a reasonably high fat content. Climate conditions and excessive handling call for sturdy packaging in boxes that hold 20 or 30 kilograms, of a size and shape suitable for hand stacking, and well sealed. Fish should be placed in plastic bags or netting before being boxed, and a label on the box should indicate the size of the fish.

13. As for Canada's supply capability, east coast catches of mackerel have more than doubled since 1975, totalling nearly 30 000 tonnes, round weight, in 1979. Scientific experts say Canada could take five to six times that quantity without harming the stocks, and supplies of that size would allow Canadian exporters to talk seriously to the Nigerians. There are, however, some uncertainties. As a transboundary stock, mackerel is not covered by a total allowable catch (TAC). In the absence of a long-term agreement with the US on east coast fishing, the mackerel available to Canadian boats may not reach these levels, especially if the Americans become more interested in mackerel for its industrial potential than as a recreational fishery.

14. Freezing capacity for such large quantities of fish may not now be available in Canada. Processors would have to balance the capital and operating investment necessary against projected revenues from selling quantities of frozen fish to the Nigerian market and others.

15. Concerning canned products, canned mackerel and sardines are the big sellers and competition from Japan and Spain makes pricing the critical marketing variable.

16. Canada does not produce stockfish at present, but interest is being shown by some processors in Newfoundland. Supplies of Canadian cod will be adequate, but whether the Canadian fish is large enough to suit Nigerian tastes will have to be determined. The quality need not be superior, and the investment required for processing is relatively small. A proper drying climate is the critical element, and some areas of Newfoundland are thought to be suitable.

17. Nigeria's shrimp industry may offer immediate opportunity for investment through a joint venture in the Nigerian National Shrimp Company. Direct shippers of Canadian frozen fish might also want to explore the possibility of Nigerian export shrimp as a backhaul.

18. Nigeria can be a difficult place in which to do business. Infrastructure is inadequate, prices are high, and life can be frustrating. An overnight government decision banning a product or placing it under licence can have drastic effects on sales. Decisions on tariff and duty schedules can be made without notice. Central Bank procedure makes for slow payment of a supplier's receivables. But with tenacity, thorough research, and the right connections, the market rewards can be substantial.

19. Any potential supplier of frozen fish might be well advised to explore the Las Palmas and UK market connections, since deals are normally concluded in these locations, and sources there can provide expert advice on transport and shipping.

20. If one wishes to invest in a joint venture, it is important to have a Nigerian partner who is astute and well connected.

21. Among several problems in the fisheries sector, Nigeria has inadequate fishing terminals and other facilities that make up the infrastructure. The government is entertaining proposals from foreign firms, including Canadian and Norwegian, to build processing plants.

APPENDIX I

FOREIGN INVESTMENT POLICY

Within the constraints of the Companies Decree of 1968 and the Nigerian Enterprises Promotion Decree of 1972 (amended 1976, 1977), foreign investment is welcome. Limitation on repatriations of earnings, expatriate quotas, conflicting priorities among ministries, constant issuance of decrees changing investment terms, and federal government proliferation of red tape and slowness of paper processing can, however, make investing in Nigeria a frustrating process. A review of past investment successes shows them to be tailored to meet special circumstances in the Nigerian market.

Since December 31, 1978, all companies operating in Nigeria must have a minimum of 40% Nigerian participation. In 1977, three investment schedules were set up designating concerns reserved exclusively for Nigerians, entities requiring 60% and 40% Nigerian participation. Fish and shrimp trawling and processing, and distribution of imported fish require at least 60% Nigerian ownership. In addition, the decree requires that 10% of the shares affected must be reserved for employees of the company concerned.

The industries in which the government is keen to encourage growth are known as "pioneer industries" and these include foodstuffs, processing industries and import substitution industries.

As of December 31, 1978, a foreign company must incorporate (the Nigerian part of the company's operations) in Nigeria in order to continue in business or open a new business. There are only a few exceptions to this requirement and a Canadian firm should expect to conform to this law.

APPENDIX IIIMPORT CONTROL PROVISIONS (FOR COMPLETE EXCHANGE CONTROL ACT,
NOTICE TO IMPORTERS, SEE APPENDIX IV)

Nigerian trade policy has lately tightened up as the country attempts to reduce its spiralling imports bill. Fish and fish products may be increasingly scrutinized and bear market restrictions. The Import Prohibition Order has, in the past, been issued on April 1 of each year, but this will be changed to January 1. The 1980 import prohibition list has not further restricted fish imports.

At present, the Central Bank has imposed a ceiling price on the value of frozen fish imports into Nigeria. Until recently, this price was C\$540 (N 251) tonne but this was dropped to C\$530 (N 246) in February, 1980. Importers are allowed to mix species of variable values to arrive at an average price per shipment not greater than the ceiling price. According to importers, however, this price is so low when calculating all costs associated with importing frozen fish as to prohibit nearly all medium and high-priced species. This ceiling price is reviewed, normally, one per year. Since the recent evaluation led to a shift downward, it is unlikely that Nigeria will be more than a mass market for mackerel, horse mackerel and similar low-priced frozen species in the short to medium term.

Nigeria has recently installed an inspection system, hiring Société Générale de Surveillance SA (SGS) of Geneva, Switzerland, to inspect goods entering Nigeria valued at N 10 000 plus. On instruction from Central Bank SGS must inspect before shipment with all associated inspection costs being assumed by the seller. A "green light" from SGS is necessary before an import may be accepted and foreign exchange is released.

Normally, the Central Bank demands 20% advance deposit at point of order for fish imports, but may require as much as 50% of total invoice value. This is viewed by the Central Bank as an incentive to import necessary goods since all other imported goods, with the exception of capital goods, raw

materials and medical supplies, require advance import deposits of 100%. Importers must produce tax clearance certificates covering the preceding three years as a prerequisite for granting a CB exchange approval for all private sector transactions. Canadian exporters are advised to use irrevocable letters of credit and instructed that terms of credit can be negotiated with the importer. Canadians are also warned to carefully check the references of any firm with which they do business in Nigeria.

Importation of frozen fish is handled under three separate categories as shown in Table A-1.

TABLE A-1

Importation Duties for Frozen Fish as of February, 1980

	<u>Fiscal Entry</u>
A. Fish caught and landed by Nigerian-owned vessels registered in Nigeria and flying the Nigerian flag.	Free
<p>These are no longer treated as imports. Foreign exchange disbursements may be required, however, for purchase of the vessel or ship servicing.</p>	
B. Fish and shrimps caught and landed by foreign vessels chartered by Nigerian companies.	2 kobo/kilogram + 5% surcharge for port facilities
<p>Under this arrangement not more than 60% of the value of the landed fish will be allowed as charter fees, that is, available as foreign exchange. The remaining 40% or more must remain in Nigeria for re-investment. The number of charter arrangements has declined since this regulation's inception according to CB officials. (This is not, however, what imports data suggest).</p>	
C. Regular import using a foreign ship.	4 kobo/kilogram + 5% surcharge for port facilities
<p>This arrangement is subject to heavier tariffs, but does allow for 100% remittance of foreign exchange.</p>	

Source: Central Bank of Nigeria.

In all cases of importation of fish, the specifications of the carrying vessel should receive prior approval from the government inspector of shipping in respect of capacity, performance, etc. and be registered with the Nigerian Port Authority/Federal Department of Fisheries at least two months before arrival, indicating the name of the vessel, the origin, the length of the vessel, as well as the type of radio employed.

An importer must take care to fill out all the forms required in the specified numbers of copies, particularly Form "M", which serves as authority for opening a Letter of Credit (L/C). It is only after the relevant Form "M" has been processed that an importer can confirm an order to the seller.

As an exporter one should then ensure that a fish importer completes Form "M" in sextuplicate, accompanied by four copies of a proforma invoice showing the price split into f.o.b. and freight with all ancillary charges shown separately. Finally, a "Clean Report of Findings" from SGS may also be required.

Thus the minimum documents required on shipments to Nigeria are the commercial invoice, bill of lading, packing list and, in the case of fish, sanitary and health certificates issued by DFO/SGS. The required Nigerian entry form and "certificate of value" must be filled out. Nigeria also has specific regulations regarding the size and format of the invoice to be used and the required contents thereof. If a licence is required, a Canadian fish exporter should ensure that all steps are completed before the goods are dispatched. Fish and stockfish are exempted from any provisions requiring port cargo clearance certificates.

Entry of goods must be accomplished within three days after landing, if storage is to be provided. Pre-entry is recommended.

All goods imported into Nigeria must be insured with a registered Nigerian insurance company. If a firm submits a tender bid for construction consultancy or professional services to be executed partly or wholly in Nigeria, prices should not be quoted in a foreign currency. Contracts with a foreign exchange element should not include a fixed rate of exchange or remittance.

The 1979 budget has placed greater pressure on imports through tightening of bank credit guidelines. Merchant banks can now lend only 8% of total loan money for imports (down from 11%), while for commercial banks the corresponding figure is 5% (down from 8%).

In addition, the proportion of loans to indigenous enterprises has been increased from 60 to 70%, and 10% must go exclusively to small-scale enterprises that are wholly Nigerian-owned. The Central Bank of Nigeria provides the commercial banks with cover for foreign payments only in sterling or US dollars. Conversion to Canadian dollars might thus be required before effecting any remittance.

Nigeria is a member of GATT, the Economic Community of West African States (ECOWAS), and the Lome Convention. ECOWAS encourages intra-African bilateral trade agreements and the Lome Convention is a five-year trade and aid treaty between the European Economic Community and 54 African, Caribbean and Pacific nations (ACP) which was signed in 1975. The latter agreement abandoned reciprocity in trade concessions enshrined in the Treaty of Rome, included an export stabilization scheme (STABEX), contained a scheme for industrial co-operation, relaxed the conditions governing rights of establishment and services and payments and capital, obtained agreement on free access of tropical agricultural products and minerals to EEC markets of African, Caribbean and Pacific manufactures and semi-manufactures with some limits on fair competition, of access to EEC markets or other ACP agricultural products which are produced in Europe.

To some extent, ECOWAS may negatively affect the relative demand for imports since Nigeria is trying to sign bilateral agreements which allows its fleets to fish off the richer coasts of some ECOWAS-member countries such as Senegal, Mauritania and Guinea-Bissau.

The Lome Convention has not thus far been favourably regarded by most third-world countries that participate. This may change due to the renegotiation of some of the terms in the summer of 1979. It is not, however, expected to be a major impediment to Nigerian export opportunities for Canadian fisheries sector suppliers.

APPENDIX IIIMAJOR FROZEN FISH IMPORTERS

Frozen fish importing, as an industry, is approximately 10 years old, and its growth has been outstanding, especially in the periods 1968-71 and 1974-79, when imports increased more than fourfold in each period.

All of the companies covered in this survey are joint ventures and/or associated with agents outside the country. They all have cold storage areas in Lagos and one other major coastal city, usually Port Harcourt. Each also has established its own network of cold storage depots in the interior operated by factors who invest substantial sums (N10 000 to N11 000) for the exclusive rights to sell, on commission, fish supplied by the company.

Any cold storage equipment (which must be licensed for operation), including storage rooms and refrigerated trucks, is purchased through ALUMACO of Nigeria from Brazil, the USA and Spain. This equipment is operated at -18°C to -20°C, which gives a product storage life of around six months. On average, each company carries 10 to 12 days' inventory.

All firms use irrevocable letters of credit, and they emphasized it takes at least three months for the Central Bank to approve the release of foreign exchange.

There is some seasonality in the market, which is said generally to be slower, accompanied by lower prices, in the period before and during Christmas, during Muslim festivals when no fish is eaten and during January and February (harmattan or dry season).

All firms purchase at least 3 000 to 3 500 tonnes per month, and in 1979 their buying volume was as high as 10 000 tonnes per month. Importers are interested in placing large orders on a regular basis.

Names and addresses of companies appear in Appendix XI.

Ibru Seafoods Limited

This company is the number one importer of frozen fish in Nigeria, part of a conglomerate started by Chief Michael Ibru in 1956. It has 7 000 tonnes of cold storage capacity in Lagos, 7 000 tonnes in Sapele (south of Benin City), and 3 000 tonnes in Port Harcourt. Ibru is now the exclusive importer in Nigeria for Sovhispan SA in Las Palmas. The firm also uses its own agent in London (see Appendix XI).

Ibru's import quantities are estimated at around 33% to 35% of the total frozen fish imports (for 1978, around 70 000 tonnes). It is importing 30 to 40% horse mackerel, 20% mackerel, 10% hake and, in the remaining 30%, species such as barracuda, burro (grunt), mero (sea perch, grouper), dorade and perch.

Trans-Continental Fisheries (Nigeria) Limited

This company was established in 1976 by Indians and Nigerians and is the second most important fish importer. T-C offers modern facilities comparable to those of a typical North American frozen food distributor. It employs over 200 people and has over 150 factors in its distribution network. Cold storage capacity in Lagos is 5 500 tonnes, and in Port Harcourt 4 000 tonnes. It owns refrigerated trucks for transporting fish to cold storage, and uses a fleet of trucks (some insulated) to move its products from cold storage to the interior. It also owns light barges used to unload fish outside the harbour.

In 1979, T-C imported 8 000 tonnes per month (30% of total imports). The company purchases all of its fish on charter out of Las Palmas and the UK. Its agent in Las Palmas is M/S Campex Corporation SA (see Appendix XI).

The firm's main imports are mackerel and horse mackerel, but it also purchases sole, plaice, flounder, barracuda, red snapper, pagro (sea bream) and burro (grunt), the latter two species from Japanese and Korean vessels in Las Palmas.

Trans-Continental purchased some Russian fish, head-off, for sale in 1979 and it was not well accepted. Consequently, the firm has decided to establish a small smoked fish plant about 150 miles from Lagos and intends to begin processing in the near future, and to introduce this product slowly; and, to try to build market acceptance.

Globefish Industry Limited

Jointly owned by interests in the UK (20%), Bulgaria (20%) and Nigeria (60%) this venture is 10 years old and handles around 15% of Nigeria's frozen fish imports, of which 85% is mackerel and horse mackerel. The company also supplies hake and big-eye redfish (karas or carp). Major suppliers, besides Bulgaria, are Holland, the UK and Norway. Some "emergency" Canadian supplies have been purchased through a British agent.

The company lands fish in Lagos and Port Harcourt, where it has 5 000 tonnes and 3 000 tonnes cold storage capacity, respectively. About 20% of its fish is sold in Lagos and 80% in the interior.

Globefish owns three reefer boats, which travel to the Bulgarian fishing ships. These carrier boats are authorized to enter Lagos harbour to deliver fish or can also travel to Las Palmas to deliver higher-value species, which are marketed in Europe.

Universal Fishing Company Limited

In business since 1972, this Indian-Nigerian joint venture is estimated to have 10% of the total frozen fish market. Purchases are all made through a UK agent, and are received mainly from the UK, Holland and Romania. Present capital investment is N 900 000, which will be increased to N 1.35 million upon the expansion of cold storage facilities in Port Harcourt from 1 000 to 3 000 tonnes. Storage capacity in Lagos is around 2 200 tonnes.

Universal operates a retail market from the front of its cold storage area in Lagos from 6 a.m. to 10 a.m., and many of the local fish mummies come here to make their purchases.

APPENDIX IV

FEDERAL REPUBLIC OF NIGERIA
EXCHANGE CONTROL ACT, 1962

NOTICE TO IMPORTERS

1. INTRODUCTION

- a. This leaflet is issued to draw attention to the formalities to be observed by importers and other parties in Nigeria wishing to pay for goods imported or to be imported into Nigeria. It supersedes, from the date of issue, all previous exchange control notices in respect of payments for imports.
- b. All persons intending to effect transactions with respect to payment for imports are required, in the first instance to pass through the Authorised Dealers. Form "M" must be completed in respect of payment for imports irrespective of value.

2. COMPREHENSIVE IMPORT SUPERVISION

In order to ensure that imports into Nigeria are of the correct quality and quantity according to contracts and that only the normal price of that commodity in the country of supply is paid, the Société Générale de Surveillance S.A., (SGS) Geneva, Switzerland, or its affiliates and agents, on the instruction of the Central Bank of Nigeria (where necessary) will carry out pre-shipment inspection of goods being consigned to Nigeria and issue a "Clean Report of Findings" before payment for imports is effected.

- (a) Imports into Nigeria to be shipped, air-freighted, etc. on the basis of orders placed or contract concluded on or after the 1st of January, 1979 shall be subject to compulsory quality and quantity inspection and price comparison by the Société Générale de Surveillance S.A. (SGS) BEFORE SHIPMENT IS EFFECTED. Accordingly, all contracts for imports must stipulate this pre-shipment inspection.

- (b) Notwithstanding that some importers may have placed firm orders for importation of goods into Nigeria, whether such goods are imported under Letters of Credit or Bills for Collection or any other form, the pre-shipment inspection and price comparison will have to be made, unless shipment can be and is completed before the 1st of January, 1979.
- (c) Société Générale de Surveillance S.A. who are acting for and on behalf of the Federal Military Government commenced inspection operations on 1st January, 1979.

3. NOTICE FOR INSPECTION

- (a) Before shipment of goods, sellers are required to give at least 14 days notice to SGS indicating the place where the goods may be inspected, and the expected time of despatch. When requesting pre-shipment inspection the seller is required to provide SGS with a copy each of the proforma invoice, letter of credit, contract price list and any other document relevant to the order, which SGS may deem necessary for the execution of its inspection.
- (b) The seller shall also provide all necessary facilities so that SGS can carry out the quality and quantity in inspection and price comparison and conduct all such tests, analysis, etc., as may be required. The cost of presentation of the goods to SGS, unpacking, repacking, handling, etc., shall be borne by the seller.

4. ISSUE OF REPORT OF FINDINGS

Upon completion of inspection SGS shall issue a Report of Findings, which shall be either:

- (a) A Clear Report of Findings, if the inspection yields a satisfactory result. A Clean Report of Findings shall not be issued until the Inspection Order copy of Form "M" has been received, and the seller provides SGS with a copy of the final invoice covering the goods.

- OR (b) A non-Negotiable Report of Findings if the inspection reveals discrepancies.

No payment shall be effected against a Letter of Credit. Bills for Collection or any other form of claim unless the documents presented for payment include a Clean Report of Findings. Correspondent banks abroad should be notified accordingly of these requirements.

5. PRE-IMPORT PROCESSING BY CBN

- (a) All importation of goods into Nigeria shipped from any port of origin on or after 1st January, 1979 whether under Letters of Credit or Bills for Collection or any other form shall be subject to Pre-import Processing by the Exchange Control Department of the Central Bank of Nigeria, Lagos.
- (b) Applications must be made on Form "M" which must be completed in sextuplicate (six copies) and submitted through an Authorized Dealer to the Exchange Control Department of the Central Bank of Nigeria, Lagos for processing. The application must be accompanied by four copies (photocopies acceptable) of the seller's Proforma invoice clearly showing the price split into F.O.B. and Freight with all ancilliary charges such as commissions and interest charges shown separately.
- (c) All the copies of Form "M" must be legible otherwise the application may not be processed. Applications found during the subsequent checking to be irregular or illegible will be rejected.
- (d) The Central Bank of Nigeria will number and endorse all copies of Form "M" for pre-shipment inspection where applicable, and affix thereon, full details of the SGS contact office in the country of the seller. Copies 1 and 2 of the Form will be returned to the Authorised Dealer for purpose of processing the application for approval on presentation of the shipping documents.

6. DOCUMENTATION OF PAYMENT APPLICATIONS

- (a) Settlement invoices must henceforth be all-inclusive of any additional charges including price variations and applicable contractual escalation clause. The total value of the final settlement invoice must be supported in all respects by a Clean Report of Findings, where pre-shipment inspection has been prescribed. Importers are warned that separate applications to remit funds in respect of ancillary charges relating to an importation will no longer be entertained unless such charges are supported by a "Clean Report of Findings" issued by the Société Générale de Surveillance S.A. Geneva, its affiliates or agents.

- (b) A processed Form "M" will be valid for importation within 12 calendar months of date of processing, and importers are advised that charges in specification, seller, country of supply, quantity within normal trade tolerances, will not require amendment to the form, provided that these details are supported by a "Clean Report of Findings". With regard to price, the final invoice does not have to agree with the details declared on the Form "M" provided:
 - (i) The price is supported in every respect with a Clean Report of Findings issued by SGS in cases where pre-shipment inspection have been prescribed, and

 - (ii) Any increase over the declared Form "M" prices does not exceed 10% of the declared total amount C and F.

Up-lifts in price in excess of 10% require a new Form "M". However, for goods exempted from pre-shipment inspection because of their value, approval will not be granted for more than the value of the original application.

7. USE OF FORM "M"

- (a) A processed Form "M" will serve as authority for opening a Letter of Credit, and completion of Forms "D" and "B" will no longer be necessary for this purpose. Authorised Dealers are under obligation NOT to open any Letters of Credit or allow any form of payment without a processed Form "M". Where pre-shipment Inspection has been prescribed, all Letters of Credit or any other form of payment should provide that no payment will be made without submission of a "Clean Report of Findings" issued by the SAGS, or its affiliates or Agent.
- (b) It is only after the relevant Form "M" has been processed that an Importer can confirm his order to the seller. All parties to the importation of goods into Nigeria must make allowance for the pre-shipment inspection and any contract for the importation of goods shall be null and void unless it makes provision for the pre-shipment inspection except where exemption has been granted by the Central Bank of Nigeria.

8. EXEMPTIONS

The Central Bank of Nigeria will determine which goods (either by value or by type) are to be exempted from pre-shipment inspection and will endorse such applications accordingly as being exempted from inspection after which a firm order can be given to the seller in respect of the goods. However, Authorised Dealers have been empowered to grant exemption to all goods of the value below N 10,000 (C & F) from the pre-shipment inspection.

9. ADVANCE DEPOSITS ON IMPORTS

Compulsory advance deposit shall be required for all import items other than Capital goods, Raw Materials, Medicaments and Essential Food imports. The advance deposit requirement for Cement is 50% while it is 100% for other import items.

10. ADVANCE REGISTRATION FOR IMPORTS NOT COVERED BY LETTERS OF CREDIT

With effect from 1st October, 1978, all contracts for the importation of goods worth N 100,000.00 and above, by importers who do not need to open Letters of Credit, shall be registered in advance with the Federal Ministry of Trade. A copy of such registration certificate which must furnish the following information should be forwarded to the Exchange Control Department, Central Bank of Nigeria, Lagos:

1. Name and address of the Importer.
2. Name and address of the Exporter.
3. Value of Imports.
4. Commodity.
5. Country of origin.
6. Date of Order.
7. Time of First shipment, if part shipments are involved.
8. Expected Time of final shipment.
9. Expected Time of arrival.
10. Description of Goods.
11. Value of C & F.
 - (i) In Naira.
 - (ii) In currency of exporting country of contract.
12. Term and Mode of Payment.
13. Estimated Time of Delivery of Goods.

11. PROCEDURE FOR PAYMENT FOR IMPORTS

Foreign exchange will be released to Authorized Dealers on application in line with the following procedure:

(a) PAYMENTS AGAINST LETTERS OF CREDIT

Authorized Dealers are required, when submitting applications for payments in respect of imports under Letters of Credit, to attach the original copy of processed Form "M" as approved by Central Bank of

Nigeria, attested cable as confirmation of the receipt of the shipping documents by their overseas correspondents, proforma invoice, a copy of the relevant letter of credit opened by them and a certified copy of import licence (where applicable). The relevant shipping documents i.e. attested invoice, a copy of the non-negotiable bill of lading, a copy of the Certificate of Insurance and a "Clean Report of Findings" issued by an Affiliate or Agent of Soci t  G n rale de Surveillance S.A. Geneva, Switzerland (where applicable) should be forwarded to the Central Bank of Nigeria within 21 days of receipt of the cable.

(b) PAYMENTS AGAINST BILLS FOR COLLECTION

In seeking approval for the payment against Bills for Collection, Authorised Dealers are required to support the applications with the original copy of processed Form "M" as approved by Central Bank of Nigeria, Bill History, Attested Invoice, a certified copy of import licence (where applicable). Certificate of insurance, a copy of the relevant Non-Negotiable Bill of Lading, Customs Bill of Entry evidencing receipt of goods (where applicable) and a "Clean Report of Findings" issued by an Affiliate or Agent of Soci t  G n rale de Surveillance S.A. Geneva, Switzerland (where applicable).

Where the goods have not been entered into Customs when foreign exchange is sought, the exchange control copy of the Customs Bill of Entry in support of import applications is required to be submitted to the Central Bank within 90 days (3 months) of release of foreign exchange for the relevant import. Where the Exchange Control copy of the customs Bill of Entry is not in agreement with the Clean Report of Findings issued by SGS in respect of quality and quantity and value of goods, importers shall be required to furnish an explanation for the discrepancy to the satisfaction of the Central Bank.

Where imports are insured under an open cover, individual insurance certificates may not be required on each occasion application is made for foreign exchange. Nonetheless, the importer shall be required to produce an insurance cover for specific goods imported on each occasion foreign exchange cover is being sought.

12. DEFERRED PAYMENT

All applications occasioning deferred payments over extended period, instalmental payments and pre-payments should be referred to the Import Office of the Exchange Control Department of the Central Bank (supported with relevant document) for determination. Applications in respect of purchase of ships and aircraft should be forwarded to the Federal Ministry of Finance for determination.

13. DOWN PAYMENTS

In cases of deferred payments in respect of imports of capital goods and machinery, where an agreed percentage not exceeding 15% of the contract price between the exporter and the importer is to be paid in advance at the time the contract is confirmed, and the balance made under letter of credit or other mode of payment, such down payment can be released in foreign exchange to the exporter after the relative Form "M" has been processed and passed as satisfactory. Subsequent instalmental payments under the Letter of Credit will only be released in foreign exchange on the presentation of shipping documents including a Clean Report of Findings issued by SGS.

14. PAYMENT FOR PLANTS AND MACHINERY

All applications for imports involving foreign exchange payment for plant, machinery and/or equipment of the value of N 50 000 (per complete unit) and above should in addition to the usual documents be supported with the following documents:

- (i) Certified proforma invoice or purchase order or certified agreement between importer and exporter.
- (ii) Either a Guarantee by a recognised Bank in the exporter's country that in the event of non-performance by the exporter, any foreign exchange already transferred in respect of the plant, machinery or equipment will be refunded to the Central Bank or Performance Bond issued by a recognized Bank or other reputable institution acceptable to the Central Bank guaranteeing performance by the exporter.

(iii) For public sector projects, a certificate from the Federal Ministry of Industries or the responsible Ministry that the project has been approved for execution. For non-public sector projects, two copies of a summary of the final project documents or any other satisfactory document showing that the project is viable and that the sponsors are willing and ready to execute it.

(iv) In the case of a new project, satisfactory evidence of the source of funds to cover the cost of the project including the cost of the plant, machinery or equipment to be imported.

15. INTEREST PAYMENT

Interest will only be paid in respect of imports on which a bill of exchange is drawn payable at some days after sight or acceptance, i.e., term bill or usance bills. Remittance of interest will be permitted to the extent of the term of the bills. Interest claimed on invoices but not shown on the bill of exchange will not be allowed. Goods sent under sight payment will not normally rank for remittance of interest. Central Bank of Nigeria will however consider payment of interest for a reasonable transit period from the date of the authenticated cable advice of payment from the correspondent bank to the date of foreign exchange allocation. The rate of interest to be allowed will be commensurate with the interest ruling at the exporting country.

16. MIXED TRANSACTIONS

Where an application involves items of visible and invisible imports irrespective of value, Form "M" will be completed and supported with the appropriate documents relevant to the various transactions involved.

17. IMPORT THROUGH THE POST

In the case of importations through the post for which the Customs do not require entry, the following documents must be attached to Form "M":

- (i) Relevant Attested Invoice.
- (ii) The portion of the wrapper of the parcel bearing the sender's and the importer's addresses' and the Post Office Stamp. Post Office receipt and photocopy of the Post Office Delivery Notice would only be demanded if the importation of goods is by registered post.
- (iii) Clean Report of Findings issued by an affiliate or Agent of SGS where applicable.

All other applications that do not fall within the above category should be referred to the Central Bank of Nigeria for determination.

18. IMPORTATION OF FISH

Application for the charter of fishing vessel shall require prior clearance with the Central Bank of Nigeria. All applications for the payment for the hire of fishing vessels (Charter Fees) shall be submitted to the Exchange Control Department of the Central Bank of Nigeria supported with the following documents:

- (i) Charter Party Agreement
 - (ii) Completed Form "M" in sextuplicate
 - (iii) Customs Bill of Entry
 - (iv) Customs Certificate of Clearance issued by the Department of Customs
 - (v) Tally Sheets and
 - (vi) Cargo Manifest
-
- (a) Fish caught and landed in Nigeria by Nigerian-owned vessels registered in Nigeria and flying the Nigerian Flag shall no longer be treated as imports. Consequently, there will be no foreign exchange disbursement except remittance for the purchase of the vessel.
 - (b) Where the fish and shrimps are caught and landed by foreign vessels chartered by Nigerian companies, not more than 60% of the value of the landed fish shall be allowed as charter fees.

In all cases of importation of fish, the specification of the carrying vessel should have received the prior approval of the Government Inspector of Shipping in respect of her capacity, performance, etc.

19. ON - SALES

The following procedure should be followed in the case of imports, irrespective of the value:

- (a) If the applicant is not the importer in whose name the goods have been entered to Customs the certified exchange control copy of the Customs Bill of Entry must be obtained by him from the importer in whose name the goods have been entered. If, however, such a copy is not available e.g. because the entry covers goods for more than one applicant, particulars of the relative Customs Entry must be marked in the invoice, viz: number and date of Entry, name and address of the importer in whose name the entry is made together with full particulars of ownership of the transfer of the goods.
- (b) If the applicant sells the goods before they are entered to Customs and entry is made by a third party, the duplicate Form "M" must be lodged with the Central Bank, together with full particulars of the disposal of the goods.

20. RE-EXPORTATION

Where goods intended for importation into Nigeria are re-exported to a third country, application to remit invoice amount or part thereof should be made on Form NCD3(A). The application should be submitted to the Central Bank through an Authorised Dealer supported with the relevant invoices, documentary evidence of diversion and receipt of the proceeds in Nigeria from the country to which the goods were sent.

21. PRE-PAYMENT FOR IMPORTS

Pre-payments could be approved by the Central Bank for the following list of items:

- (a) Sample goods.
- (b) Ceremonial and Professional dresses.
- (c) Religious and Ceremonial goods.
- (d) Scientific equipment.
- (e) Medical and other professional equipment for recognized public and private professions.
- (f) Drugs and Medicaments not available locally against doctor's prescriptions.
- (g) Limb fitting on doctor's prescription.
- (h) Articles to aid the deaf and dumb, and other certified handicapped persons (e.g. blind patients).
- (i) Spare parts of machinery on production of satisfactory evidence.

The maximum amount that can be approved for any of the items listed above except ceremonial dresses, is limited to N 250.00 (Two hundred and fifty naira) in foreign currency.

Applications for such pre-payments should be made on Form "M" and forwarded to the Central Bank through an Authorised Dealer with relevant supporting documents for determination.

22. IMPORT LICENCE

It should be clearly understood that nothing in the current Exchange Control regulations relieves an importer from any obligation to obtain an import licence where such is necessary before goods can be imported.

23. TAX CLEARANCE CERTIFICATE

It is also pertinent to state that the presentation of Tax Clearance Certificate covering the preceeding three years is a prerequisite for any transaction coming within the scope of exchange control and therefore, attachments to any completed Form "M" must include evidence of tax payment of clearance.

EXCHANGE CONTROL DEPARTMENT
CENTRAL BANK OF NIGERIA,
L A G O S.

30TH JUNE, 1979

APPENDIX VNIGERIA: MARKET ENTRY REQUIREMENTS AND BARRIERS

1. Distribution of fish

Fish products are marketed fresh, frozen, dried, canned and smoked.

Most of Nigeria's domestic catch is sold fresh or smoked in small, local, open air markets. Consumers prefer fish to be fresh; but if left unsold, it is smoked and distributed when fresh fish is not available. Women known locally as "fish mummies" are the primary retail marketing force. They are also semi-wholesalers in the interior distribution system, and are among the most influential of all economic groups. They are superb traders and often act as financiers for fishermen, owning the boats and gear used. Thus the "mummies" exercise strong control over catches, fish prices and profit margins.

Frozen fish and fish imports enter through, and are distributed out of, Lagos and Port Harcourt, where the major importers have their offices and largest cold storage facilities. Road transport is used to take fish into the interior. Smaller cold storage depots run by "factors" (who are in some cases "mummies") store and distribute fish in the interior.

Retail markets regardless of location, suffer from poor hygienic conditions and no standards system exists for consumers to determine weight and quality. It is truly a case of "let the buyer beware".

Canned fish is purchased by food importers, department stores and supermarkets, and the government purchasing arm, the Nigerian National Supply Company (NNSC), which has its own chain of retail outlets. The majority of canned fish sales are also made on the streets from open-air food stalls or from loaded trays carried on the heads of women who operate as mobile traders.

Stockfish is sold in the open markets by the mummies, at the NNSC retail stores, or through other distributors.

2. Transportation of Fish

Transportation for all fish products from Canada is available from at least seven shipping lines (see Appendix XII). Shipping times from Canadian ports (Montreal, Halifax or Saint John) to Lagos range from 17 to 39 days. Frequency of sailings varies from every three weeks to two months, with the most common sailing being monthly.

Chartering of vessels may be more economical, especially if a contract could be signed which guarantees supplying minimum quantities on a regular basis.

3. Pricing of Frozen Fish

The cost to an importer, although controlled by the Nigerian government through its maximum price scheme, will likely be affected more by the price set by the USSR and its trading arm, Sovhispan SA.

The Russians, through their Sovhispan affiliation with Ibru Seafoods, control the bulk of supplies entering this market (and, in fact, in West Africa). Prices are set in Moscow for one year's operations in late February or early March. In the past, the USSR has been accused of dumping products in these markets, i.e. selling horse mackerel for \$200 to \$250 (N 90-115) per tonne in late 1978. But this situation may change, as the Soviets recognize that Nigeria can afford to pay more and as their fishing efforts become increasingly restricted, they will have to charge more to earn foreign exchange.

Most importers surveyed had limited knowledge of the details of prices and shipping costs and arrangements, since the buying was done outside Nigeria, usually in Las Palmas or the UK. All they could say was that they obtained the fish at a price that allowed for some profit and the fish arrived on charters arranged elsewhere. As long as they had obtained proper clearance to unload in Lagos or Port Harcourt, could pay by irrevocable letter of credit, and guaranteed distribution of the fish into the interior, they were performing their part of the deal.

4. Packaging

Packaging appears to be a major problem for all suppliers of frozen fish, regardless of country of origin.

Boxes are normally unloaded by hand. The product may be transported in non-refrigerated trucks, often in 38°C temperatures. In some cases, the fish is transferred to barges before being loaded into the trucks. This makes for excessive handling and long delays in high temperatures.

A package is needed that can better withstand these conditions. The study team saw Canadian, British, Bulgarian and Soviet packaging and none performed satisfactorily. At present, losses due to deterioration and poor packaging are estimated to be at least 10%.

The Canadian boxes could stand the most improvement. They are too difficult to stack, and are closed with strapping tape that quickly loses its adhesive qualities in the tropical heat. Because the Canadian fish is frozen IQF, packaging is all the more critical. Importers prefer the fish to be frozen at sea in blocks, since this form holds up better in the heat, especially when packaging is inadequate. They also prefer fish to be packed in plastic bags before being placed in the carton. Fish exporters might also test netting or other types of material to reduce losses by providing better protection.

Suppliers are advised to pack in uniform sizes and state the size of the product on the exterior of the package, a procedure that was followed only on the Russian and Bulgarian packages.

APPENDIX VI

NIGERIAN FISH PRODUCTION BY SECTORS 1974-1978
(tonnes)

	<u>1974</u>	<u>1975</u>	<u>1976</u>	<u>1977</u>	<u>1978</u>
TOTAL	548 197	592 030	619 648	628 938	719 073
<u>A. Artisanal</u>					
i. Coastal and brackish-water	277 196	278 846	289 608	293 952	299 782
ii. <u>Inland</u>					
Lakes	67 275	67 975	67 578	68 589	71 123
Rivers	119 975	121 223	125 497	127 376	128 216
<u>B. Industrial</u>					
i. Coastal fish	6 767	8 057	5 133	5 210	8 064
ii. Coastal (shrimp)	2 077	2 115	6 853	7 058	9 680
iii. Distant water (imports)*	74 907	113 814	124 879	126 753	202 208

* Distant water landings are regarded as imports because the vessels are chartered.

Source: Nigeria, Federal Department of Fisheries.

APPENDIX VII

NIGERIA NOMINAL CATCHES BY SPECIES, 1973-1978

		1973	1974	1975	1976	1977	1978
Cyprinids NEI	Cyprinidae Seabream	100	5 233	83	5 522	5 634	5 716
Tilapias NEI	Tilapia SPP, Sarotherodon SPP	33 500	34 546	34 909	38 099	38 661	39 656
Longfishes	Protopterus SPP	4 200	4 422	4 413	3 058	3 132	3 181
Characins	Characidae	4 800	4 575	5 011	9 009	9 303	9 457
Naked Catfishes	Bagrus SPP	17 700	18 275	18 466	6 827	6 919	7 034
Torpedo-Shaped Catfishes	Clarias SPP	36 100	37 169	37 555	37 832	37 827	38 622
Synodontis Catfishes	Synodontis SPP(Lizardfish)	12 900	13 501	13 531	10 544	10 633	10 724
Freshwater Fishes NEI		68 300	66 435	70 242	81 690	80 923	83 044
Nile Perch	Lates Niloticus	53 600	55 196	55 851	48 237	47 132	48 552
Tonguefishes (-Tongue Soles)	Cynoglossidae	9 800	10 106	10 212	12 753	11 862	12 274
Sea Catfishes	Arilidae Catfish	14 300	14 535	14 686	20 461	20 853	21 440
Conger Eels NEI	Congridae	600	606	529	370	395	402
Snappers	Lutjanus SPP	16 700	17 242	17 422	18 940	19 434	19 815
Grunt (Grunters) NEI	Pomadasyidae	17 100	11 432	11 552	10 946	10 947	11 154
West African Croakers	Pseudotolithus SPP	27 400	28 191	28 484	32 298	35 292	36 158
Barracudas	Sphyraena SPP	15 200	15 590	15 752	14 360	14 722	15 088
Mulletts NEI	Mugilidae	12 200	13 634	13 776	12 732	13 077	13 335
Threadfin	Polynemidae	35 400	36 496	36 946	40 488	41 673	42 472
Carangids NEI	Carangidae	25 600	26 387	26 661	23 490	24 098	24 573
Butterfishes, Pomfrets NEI	Stromateidae	1 100	15 783	1 141	861	879	893
Clupeoids NEI	Clupeoidei Sardinops	8 200	8 416	8 531	6 477	6 645	6 773
Largehead Hairtail	Trichiurus Lepturus	-	-	-	3 005	3 087	3 148
Skates and Rays NEI	Rajiformes	5 100	5 635	6 778	3 652	3 755	3 908
Sharks, Rays, Skates, etc.		5 300	5 584	5 642	15 739	16 160	16 404
Marine Fishes NEI		37 700	21 962	25 728	37 789	38 864	42 828
Northern Pink Shrimp	Penaeus Duorarum	2 200	2 244	2 268	1 763	2 117	1 916
Value of landings in US\$		\$465 100	\$473 193	\$466 169	\$496 942	\$504 024	\$518 567

Source: 1978 FAO Yearbook of Fishery Statistics Vol. 46, p. 273.

FAO figures for total catch deviate slightly, but not significantly ($\frac{1}{2}$ %-1%) with the exception of shrimp, from those calculated by the Nigeria Federal Department of Fisheries.

APPENDIX VIIIIMPORTS BY SELECTED COUNTRIES OF ORIGIN 1977, 1978UNITED KINGDOM EXPORTS TO NIGERIA, 1977

	<u>Quantity (tonnes)</u>	<u>Value (C\$'000)</u>
TOTAL, all fish and seafood	60 210	22 128

All exports of 0.5 tonnes and over are shown

	<u>Quantity (tonnes) rounded</u>	<u>Value (C\$'000) rounded</u>	<u>Price (average) per tonne</u>
<u>SEAFISH/FRESH WATER FISH</u>			
<u>Fresh/chilled</u>			
Mackerel, whole	9 222	1 766	190
Sardines/pilchards	18	6	350
Fish fillets	12	37	3 130
	<u>9 252</u>	<u>2 809</u>	
<u>Frozen</u>			
<u>Whole</u>			
Cod	3	4.5	1 580
Mackerel	50 083	19 109	380
Haddock	3	4.5	1 580
	<u>50 089</u>	<u>19 118.0</u>	
<u>Fillets</u>			
Cod, non-retail pack	12	42	3 530
Cod, retail pack	2.5	10	3 890
Haddock, non-retail pack	1.5	4	2 890
Haddock, retail pack	8	29	3 530
Herring	1	1	1 760
Plaice	2	9	4 350
N.E.S. - general	4	14	3 840
- raw, breaded, battered	21	85	4 000
	<u>52</u>	<u>194</u>	

CONT'D UNITED KINGDOM, 1977

	<u>Quantity (tonnes) rounded</u>	<u>Value (C\$'000) rounded</u>	<u>Price (average) per tonne</u>
<u>Whole/headless/pieces/fillets</u>			
Cod	10	35	3 340
Haddock	.7	1	2 780
Halibut	2.5	7	3 020
Herring	1	2	2 170
Plaice	4	6	1 930
Salmon	5	63	13 730
Squid (cuttlefish)	6	10	1 980
Trout	2	9	5 190
Sprats	7	10	2 260
N.E.S.	22	32	1 420
<u>Prepared/preserved</u>			
Herring	10	29	2 970
Mackerel	28	45	1 660
Salmonidae (arctic char, trout), not in cans	37	38	1 040
Tuna	17	71	4 270
N.E.S.	46	110	2 360
<u>Smoked/cooked/kippered</u>			
Herring, smoked, kippered	8.5	23	2 750
Herring, smoked, cooked	4.0	7	1 740
Kippers	13	36	2 720
Salmon	5	94	17 270
N.E.S.	7	27	4 100
<u>Canned</u>			
Salmon	9	688	6 520
<u>Dried</u>			
Cod	3	15	4 940
<u>Shellfish</u>			
Crab, prepared	0.5	6	11 690
Crustaceans, prepared/preserved	2.0	13	7 720

DENMARK EXPORTS TO NIGERIA 1977

	<u>Quantity (tonnes) rounded</u>	<u>Value (C\$'000) rounded</u>	<u>Price (average) per tonne</u>
Total, all fish and seafood	68	277	
<u>Frozen</u>			
<u>Whole</u>			
Plaice	1	3	3 530
<u>Fillets</u>			
Cod	3	7	2 410
Haddock	2	2	1 410
Flatfish	5	11	2 220
<u>Whole/headless/pieces</u>			
Flounder	1	3	3 350
Haddock	1	3	2 820
Salmon	4	23	5 820
Trout	3	9	3 000
<u>Preserved/prepared</u>			
Herring, whole, in a.c.*	1	3	3 880
Mackerel, whole in a.c.	2	3	1 500
Mussels, in a.c.	9	18	2 050
Tuna, in a.c.	3	9	3 290
Sprats, in a.c.	2	3	1 940
NES, in a.c.	3	11	3 880
NES, not in a.c.	2	5	2 910
<u>Smoked</u>			
Salmon, whole/pieces	8	93	11 650
Trout, whole/pieces	1	4	4 410
<u>Fish roe</u>			
Caviar (substitutes)	7	33	4 810
<u>Fish roe/liver/milt, in a.c.</u>	5	12	2 430
<u>Shellfish</u>			
Shrimp, whole/pieces, prepared			
preserved, in a.c. (not)	1	3	3 700
in a.c.	4	19	4 890

* a.c. - airtight containers

DENMARK EXPORTS TO NIGERIA 1978

	<u>Quantity (tonnes) rounded</u>	<u>Value (C\$'000) rounded</u>	<u>Price (average) per tonne</u>
Total, all fish and seafood	586	1 900	
<u>Fresh/chilled</u>			
Salmon, whole/headless/pieces	1	3	3 320
<u>Frozen</u>			
Whole Plaice	1	4	4 990
<u>Fillets</u>			
Cod	9	29	3 250
Haddock	3	9	3 250
Flatfish	7	27	3 920
NES	1	2	2 490
NES, raw/breaded/battered	1	2	2 490
<u>Whole/headless/pieces</u>			
Haddock	1	3	2 700
Salmon	2	17	8 630
Trout	6	24	4 050
Flatfish	1	3	3 950
<u>Preserved/prepared</u>			
Herring, whole, in a.c.*	4	11	2 850
Mackerel, whole, in a.c.	20	49	2 450
Mussels, in a.c.	13	30	2 330
Tuna, in a.c.	1	2	2 700
Salmonidae, in a.c.	2	12	6 030
NES, in a.c.	1	6	6 230
Misc. fish products, not in a.c.	16	36	2 260
<u>Smoked</u>			
Salmon, whole/pieces	4	51	12 790
Trout, whole/pieces	1	7	7 900
<u>Dried</u>			
Cod, n.e.s.	481	1 499	3 110

CONT'D DENMARK, 1978

	<u>Quantity</u> (tonnes) <u>rounded</u>	<u>Value</u> (C\$'000) <u>rounded</u>	<u>Price</u> (average) <u>per tonne</u>
<u>Fish roe</u>			
Caviar (substitutes)	3	31	10 390
Fish roe/liver/milt	4	18	4 670
<u>Shellfish</u>			
Shrimp, whole/pieces, prepared preserved, in a.c.	3	25	8 520

* a.c. - airtight containers

FRANCE EXPORTS TO NIGERIA, 1977

	Quantity (tonnes) rounded	Value (C\$'000) rounded	Price (average) per tonne
Total, all fish and seafood	365	161	
<u>Frozen</u>			
Whole/headless/pieces Mackerel	365	161	440

FRANCE EXPORTS TO NIGERIA, 1978

Total, all fish and seafood	19	191	
<u>Prepared/preserved</u>			
Sardines, whole/pieces	19	191	10 060

WEST GERMANY EXPORTS TO NIGERIA, 1977

Total, all fish and seafood	33	60	
<u>Stockfish</u>			
Cod	33	60	1 820

WEST GERMANY EXPORTS TO NIGERIA, 1978

Total, all fish and seafood	1 672	673	
<u>Frozen</u>			
Mackerel, whole/headless/pieces	993	354	350
NES, whole/pieces, not in a.c.	659	244	370
<u>Prepared/preserved</u>			
Herring, whole/pieces, not in a.c.	20	75	3 720

ICELAND EXPORTS TO NIGERIA, 1977

	<u>Quantity (tonnes) rounded</u>	<u>Value (C\$'000) rounded</u>	<u>Price (average) per tonne</u>
Total, all fish and seafood	3 206	11 032	
<u>Stockfish</u>	2 754	10 565	4 100
<u>Dried</u>			
Fish heads	427	456	1 060
<u>Fishmeal</u>	25	11	470

ICELAND EXPORTS TO NIGERIA, 1978

Total, all fish and seafood	6 197	25 425	
<u>Stockfish</u>	5 373	24 298	4 520
<u>Salt/dried/brine</u>			
NES, whole/headless/pieces	29	70	2 420
<u>Dried</u>			
Fish heads	778	1 027	1 320
<u>Prepared/preserved</u>			
Capelin, in a.c.	17	30	1 770

NETHERLAND EXPORTS TO NIGERIA, 1977

Total, all fish and seafood	12 513	3 350	
<u>Frozen</u>			
<u>Whole/headless/pieces</u>			
Mackerel	12 379	3 315	260
NES	134	35	260

NETHERLANDS EXPORTS TO NIGERIA, 1978

	<u>Quantity (tonnes) rounded</u>	<u>Value (C\$'000) rounded</u>	<u>Price (average) per tonne</u>
Total, all fish and seafood	40 010	13 922	
<u>Frozen</u>			
<u>Whole/headless/pieces</u>			
Mackerel	36 681	12 692	340
NES	3 329	1 230	360

NORWAY EXPORTS TO NIGERIA, 1977

Total, all fish and seafood	12 700	20 185	
<u>Frozen</u>			
<u>Whole/headless/pieces</u>			
Mackerel	6 778	2 440	360
<u>Stockfish</u>			
Cod (split)	182	915	5 020
Cod (round)	1 955	9 805	5 010
Pollock (split)	21	73	3 560
Pollock (round)	332	1 417	3 570
Gadidae (mainly cod)	2 737	4 070	1 480
<u>Dry/salted/split</u>			
Pollock	567	1 273	2 240
Gadidae	63	84	1 350
<u>Smoked/cooked</u>			
<u>Whole/dressed/headless/fillets</u>			
Herring	14	26	1 850
<u>Liver/roe/milt</u>	51	82	1 620

NORWAY EXPORTS TO NIGERIA, 1978

	<u>Quantity (tonnes) rounded</u>	<u>Value (C\$'000) rounded</u>	<u>Price (average) per tonne</u>
Total, all fish and seafood	16 236	22 319	
<u>Frozen</u>			
<u>Whole/headless/pieces</u>			
Mackerel	9 688	3 658	370
<u>Stockfish</u>			
Cod (split)	340	1 383	4 068
Cod (round)	2 544	10 825	4 250
Haddock	51	154	3 020
Pollock (split)	27	81	3 010
Pollock (round)	351	1 116	3 180
Gadidae (mainly cod)	2 844	5 402	1 890
<u>Dry/salted/split</u>			
Gadidae (mainly cod)	20	80	4 020
<u>Smoked/cooked</u>			
<u>Whole/dressed/headless/fillets</u>			
NES	8	22	2 790
<u>Liver/roe/milt</u>	363	598	1 640

PORTUGAL EXPORTS TO NIGERIA, 1977

Total, all fish and seafood	309	123	
<u>Frozen</u>			
<u>Whole/headless/pieces</u>			
NES	250	64	250
<u>Prepared/preserved</u>			
Sardines/Pilchards, whole/ pieces, in oil	59	59	1 000

SPAIN EXPORTS TO NIGERIA, 1977

	Quantity (tonnes) rounded	Value (C\$'000) rounded	Price (average) per tonne
Total, all fish and seafood	15 660	15 610	
<u>Frozen</u>			
<u>Whole/headless/pieces</u>			
Clupidae	150	37	240
Salmonidae	66	24	360
NES	1 595	396	240
<u>Fillets</u>			
NES	32	10	330
<u>Dry/salted/split</u>			
Cod	1	1	1 570
Fillets, NES	13	44	3 410
<u>Prepared/preserved</u>			
Anchovies, fillets	956	3	
Mussels, chilled in a.c.*	1	2	1 950
Sardines/Pilchards, whole/ pieces	12 793	14 986	1 170
Tuna, whole/pieces	2	7	3 660
NES, whole/pieces	51	102	2 000

JAPAN EXPORTS TO NIGERIA, 1977

Total, all fish and seafood	39 630	43 959	
<u>Frozen</u>			
<u>Whole/headless/pieces</u>			
Mackerel	124	53	430
<u>Prepared/preserved</u>			
Crab, in a.c.	1	12	11 540
Mackerel, whole/pieces, in oil, in a.c.	58	62	1 080
Mackerel, whole/pieces, in tomato sauce, in a.c.*	27 607	31 056	1 120
Mackerel, whole/pieces, boiled in water, in a.c.	8 010	8 561	1 060
Salmon, whole/pieces, in a.c.	19	70	3 800
Sardines/Pilchards, whole/ pieces, in a.c.	1 478	1 649	1 110
Sardines/Pilchards, whole/ pieces, in tomato sauce, in a.c.	2 328	2 533	1 080

CONT'D NIGERIA, 1977

	<u>Quantity (tonnes) rounded</u>	<u>Value (C\$'000) rounded</u>	<u>Price (average) per tonne</u>
Tuna, whole/pieces, in oil, in a.c.	5	16	3 370

JAPAN EXPORTS TO NIGERIA, 1978

Total, all fish and seafood	63 414	80 994	
<u>Prepared/preserved</u>			
Mackerel, whole/pieces, in oil, in a.c.	12	15	1 280
Mackerel, whole/pieces, in tomato sauce, in a.c.	56 114	72 876	1 290
Mackerel, whole/pieces, boiled in water, in a.c.	2 959	3 609	1 220
Salmon, whole/pieces, in a.c.	11	53	4 780
Sardines/Pilchards, whole/pieces, in a.c.	447	488	1 090
Sardines/Pilchards, whole/pieces, in tomato sauce, in a.c.	3 858	3 908	1 010
Tuna, whole/pieces, in oil, in a.c.	13	45	3 670

UNITED STATES EXPORTS TO NIGERIA, 1977

Total, all fish and seafood	155	102	
<u>Fresh/chilled/frozen</u>			
NES, whole/eviscerated	155	102	660

* a.c. - airtight containers

Source: Fisheries Systems Report, Department of Industry, Trade and Commerce,
Corporate Analysis Branch, Ottawa.

APPENDIX IXNIGERIAN FISH IMPORTS BY PRODUCT FORM, 1978

(Listed Alphabetically)	<u>Country of origin</u>	<u>Quantity tonnes (rounded)</u>	<u>Value (C\$'000) (rounded)</u>	<u>Averg. price C\$ per tonne</u>
Capelin, whole/pieces, preserved cans	Iceland	17	30	1 770
Cod, whole, frozen	UK	3	4	1 580
fillets, frozen	Denmark	9	29	3 250
packaged in other containers	UK	12	42	3 530
packaged for retail sale	UK	3	9	3 890
Cod, stockfish, split	Norway	340	1 383	4 067
excl. fillets	UK	3	15	4 940
	Iceland	5 373	24 298	4 520
	Denmark	481	1 499	3 110
Cod, stockfish, round	Norway	2 544	10 824	4 287
excl. fillets				
Cod, NES, frozen	UK	11	35	3 340
		<u>8 779</u>	<u>38 138</u>	
Haddock, whole, frozen	UK	3	4	1 500
fillets, frozen	Denmark	3	9	3 250
packaged in other containers	UK	1.5	4	2 890
packaged for retail sale	UK	8	29	3 530
Haddock, stockfish	Norway	51	154	3 020
whole/headless				
pieces, frozen	Denmark	1	2	2 700
		<u>67.5</u>	<u>202</u>	
Halibut, whole/headless/				
pieces				
fillets, frozen	UK	2.5	7	3 020
		<u>2.5</u>	<u>7</u>	
Herring, fillets, frozen	UK	1	2	1 760
Herring, whole/pieces, prepared/preserved	UK	10	29	2 970
Herring, whole/pieces, prepared/preserved, in a.c.	Denmark	4	11	2 850
Herring, smoked/kippered	UK	13	36	2 720
Herring, smoked/cooked	UK	4	7	1 740
Herring, all forms, frozen	UK	1	2	2 170
Herring, whole/pieces, preserved, packaged in other containers	W. Germany	20	75	3 720
		<u>53</u>	<u>162</u>	

	Country of origin	Quantity tonnes (rounded)	Value C\$'000 (rounded)	Averg. price C\$ per tonne
Mackerel, excl. fillets, frozen	UK	50 083	19 109	380
	Norway	9 688	3 658	370
	W. Germany	993	354	350
	Netherlands	36 681	24 042	340
Mackerel, fillets, frozen prepared for retail sale	UK	1	1	1 270
Mackerel, whole/pieces, in totato sauce, in a.c.	Japan	56 114	72 876	1 290
Mackerel, whole/pieces, preserved, in a.c.	Denmark	20	49	2 450
	UK	28	45	1 660
Mackerel, whole/pieces, boiled in water, in a.c.	Japan	2 959	3 609	1 220
Mackerel, all types fresh/chilled	UK	9 222	1 766	190
Mackerel, jack, prepared/ preserved, in a.c.	Japan	12	15	1 280
		<u>165 801</u>	<u>125 524</u>	
Mussels, preserved, in a.c.	Denmark	13	30	2 330
		<u>13</u>	<u>30</u>	
Plaice, fillets, frozen	UK	2	9	4 350
Plaice, NES, frozen	UK	4	6	1 930
Plaice, european, NES, frozen	Denmark	1	4	4 990
		<u>7</u>	<u>19</u>	
Pollock, (split), Stockfish	Norway	27	81	3 010
Pollock, (round), Stockfish	Norway	351	1 116	3 180
		<u>378</u>	<u>1 197</u>	
Shrimp, preserved, in a.c.	Denmark	3	25	8 520
		<u>3</u>	<u>25</u>	
Salmon, whole/pieces, smoked	Denmark	4	51	12 790
Salmon, whole/pieces, prepared/preserved in a.c.	Japan	11	53	4 780
	UK	9	61	6 520
Salmon, whole/headless pieces/fillets frozen	Denmark	2	17	8 630
	UK	5	63	13 730
Salmon, whole/headless/ pieces/fillets, fresh/ chilled	Denmark	1	3	3 320
	UK	.5	7	13 750
Salmon, all forms, smoked/cooked	UK	6	94	17 270
		<u>38.5</u>	<u>349</u>	

A-40

	<u>Country of origin</u>	<u>Quantity tonnes (rounded)</u>	<u>Value C\$'000 (rounded)</u>	<u>Averg. price C\$ per tonne</u>
Sardine/pilchard, whole/ pieces, prepared/preserved	UK	1	3	3 240
	France	19	191	10 060
Sardine/pilchard, whole/ pieces, in tomato sauce, in a.c.	Japan	3 858	3 908	1 010
Sardine/pilchard, whole/ pieces, fresh/chilled	UK	18	6	350
Sardine/pilchard, NES, prepared/preserved, in a.c.	Japan	447	488	1 090
		<u>4 343</u>	<u>4 596</u>	
Tuna, whole/pieces, preserved, in a.c.	Denmark	1	2	2 700
Tuna, all forms, prepared/preserved	UK	17	71	4 270
Tuna, albacore, whole/ pieces, in oil, in a.c.	Japan	1	6	5 800
Tuna, skipjack, whole/ pieces, in oil, in a.c.	Japan	10	35	3 410
		<u>29</u>	<u>114</u>	
Squid, loligo, whole/ pieces, frozen	UK	3	6	2 030
Squid, NES, whole/ pieces, frozen	UK	3	4	1 940
		<u>6</u>	<u>10</u>	
Trout, whole/pieces, smoked	Denmark	1	7	7 900
Trout, all forms, frozen	UK	2	9	5 190
	Denmark	1	3	3 320
Trout, pond, excl. fillets, frozen	Denmark	5	21	4 200
		<u>9</u>	<u>40</u>	
Salmonidae, whole/pieces, preserved, in a.c.	Denmark	2	12	6 030
Salmonidae, except salmon, whole/pieces, prepared/ preserved, not in a.c.	UK	37	38	1 040
		<u>39</u>	<u>50</u>	
Sprats, all forms, frozen	UK	5	10	2 260
		<u>5</u>	<u>10</u>	
Flatfish, fillets, frozen	Denmark	7	27	3 920
Flatfish, NES, all forms excl. fillets, frozen	Denmark	1	3	3 950
		<u>8</u>	<u>30</u>	

A-41

	<u>Country of origin</u>	<u>Quantity tonnes (rounded)</u>	<u>Value C\$'000 (rounded)</u>	<u>Averg. price C\$ per tonne</u>
Gadidae, (klipfish), excl. fillets (dry/salted/split)	Norway	20	80	4 020
Gadidae, (stockfish), excl. fillets (dry/split)	Norway	2 844	5 402	1 890
		<u>2 864</u>	<u>5 482</u>	
Fish roe caviar (substitutes)	Denmark	3	31	10 390
		<u>3</u>	<u>31</u>	
Fish roe/liver/milt	Norway	363	598	1 640
	Denmark	4	18	4 670
		<u>367</u>	<u>616</u>	
Fish, NES, all forms, salt/dried/brine	Iceland	29	70	2 420
Fish, NES, saltwater, all forms, frozen	W. Germany	659	244	370
	Denmark	1	2	2 490
	Netherlands	3 329	1 230	360
	UK	23	32	1 420
	UK (fillets)	4	14	3 840
	UK fillets - raw, battered, breaded	21	85	4 000
	Denmark fillets - raw, battered, breaded	1	2	2 490
Fish, NES, whole/pieces, prepared/preserved	Denmark	1	6	6 230
Fish, NES, all forms, prepared/preserved	UK	47	110	2 360
Fish, NES, all forms, smoked/cooked	UK	7	27	4 100
	Norway	8	22	2 790
Fish, NES, prepared/ preserved, in a.c.	Denmark	16	36	2 260
Fish, NES, fillets fresh/chilled	UK	12	37	3 130
Fish heads, dried	Iceland	778	1 027	1 320
Fishmeal	UK	576	297	510
		<u>5 512</u>	<u>3 241</u>	
Crustaceans, excl. crab prepared/preserved	UK	2	13	7 720
		<u>2</u>	<u>13</u>	
		<u>188 346.5</u>	<u>179 916</u>	

<u>Totals</u>	<u>Q tonnes</u>	<u>V C\$'000</u>
Fresh, chilled, frozen	110 837.5	50 959
Stockfish	12 034	44 852
Preserved/prepared in a.c.	63 658	81 856
Salted, dried, smoked	874	1 336
Fishmeal	576	297
Fish roe/liver/milt	367	616
	<u>188 346.5</u>	<u>179 916</u>

Source: Fisheries Systems Report, Department of Industry, Trade and Commerce,
Corporate Analysis Branch, Ottawa.

APPENDIX X

NIGERIAN IMPORTS OF CANNED/PRESERVED FISH PRODUCTS
FROM MAJOR SUPPLIERS 1977, 1978

Species	1977	1977	Average Weighted Price/t C\$	1978	1978	Average Weighted Price/t C\$
	Quantity tonnes (rounded)	Value (C\$'000) (rounded)		Quantity tonnes (rounded)	Value (C\$'000) (rounded)	
Anchovies	956	3	-	*	*	*
Capelin, in a.c.**	-	-	-	17	30	1 770
Crab, in a.c.	1.5	18	11 600	4	11	2 450
Crustaceans	-	-	-	2	13	7 220
Fish roe	-	-	-	3	31	10 390
Herring, whole/ pieces, in a.c.	19.5	68	2 890	-	-	-
not in a.c.	-	-	-	47	151	3 210
Mackerel, whole, in a.c.	30	48	1 653	20	49	2 450
Mackerel, whole/ pieces, in tomato sauce, in a.c.	27 607	31 056	1 120	56 114	72 876	1 290
Mackerel, whole/ pieces, boiled in water, in a.c.	8 010	8 561	1 060	2 959	3 609	1 220
Mackerel, whole/ pieces, in oil, in a.c.	58	62	1 080	*	*	*
Mackerel, jack, in a.c.	-	-	-	12	15	1 280
Mussels, whole, in a.c.	3	5	1 650	*13	*30	*2 330
Salmon, whole/pieces, in a.c.	28	758	4 720	20	114	5 563
Salmonidae, (arctic char, etc.)	37	38	1 040	39	50	1 530
Sardines/pilchards, whole/pieces, in a.c.	1 427	16 635	1 166	*467	*679	*1 456
Sardines, /pilchards, whole, pieces in oil	59	59	1 000	*	*	*

APPENDIX X (cont'd)

Species	1977	1977	Average Weighted Price/t C\$	1978	1978	Average Weighted Price/t C\$
	Quantity tonnes (rounded)	Value (C\$'000) (rounded)		Quantity tonnes (rounded)	Value (C\$'000) (rounded)	
Sardines/pilchards, whole/pieces, in tomato sauce, in a.c.	2 328	2 533	1 080	3 853	3 908	1 010
Shrimps, whole/pieces, in a.c.	1	3	3 700	3	25	8 520
not in a.c.	4	19	4 890	-	-	-
Sprats, in a.c.	2	3	1 940	-	-	-
Tuna, whole/pieces, in a.c.	22	87	4 080	*18	*73	*4 180
Tuna, whole/pieces, in oil, in a.c.	5	16	3 370	13	45	3 670
Tuna, skipjack, whole/pieces, in oil, in a.c.	-	-	-	10	35	3 410
NES, whole/pieces, in a.c.	100	223	2 225	*48	*116	2 416
NES, not in a.c.	2	5	2 910	16	36	2 260
TOTAL	53 388	59 177		63 530		

* Figures for Spain and Portugal not included in total

** a.c. - airtight containers

Source: Fisheries Systems Report, Department of Industry, Trade and Commerce,
Corporate Analysis Branch, Ottawa.

APPENDIX XILIST OF IMPORTERS' NAMES AND ADDRESSES

1. Ibru Seafoods Ltd.,
35 Creek Road,
PMB 1155 Apapa,
(Lagos) Nigeria.
Attn: Mr. Croyington Ajantis,
Marketing Manager
- IBRU Canarias,
Avda. de Escaleritas, 41-1°,
Las Palmas de G.C.,
Canary Islands.
Phone: 25 77 00
Attn: Mr. Courtney Packer
- JAYMIKE (London) Ltd.,
P.O. Box 29,
367-371 Horne Lane,
Western Avenue, London W3 ODH
Phone: 01-992-5353
Telex: 8814468, 8813735
2. Trans-Continental
Fisheries (Nigeria) Ltd.,
Apapa/Ikeja Expressway,
Ijeshatedo, Lagos,
P.O. Box 3304, Lagos.
Cable: "Contifish"
Telex: 21159 NG
Attn: Mr. Gobind Samtani
Managing Director
- M/S Campex Corporation S.A.,
Calle Luis Norte, 6-5°,
Las Palmas de G.C.,
Canary Islands.
Attn: Mr. Parso Mahtani
Mr. Tikam Mahtani
Phone: 28-275220, 275216
Telex: 96031 CNPX, 96109 PTJM
- Wales Seafoods,
77 Kenters Ave.,
Sunbury-the-Thames,
Middlesex, England.
Telex: 39773
Attn: Mr. Curtis Mehda
3. Globefish Ind. Ltd.,
13A, Ijora Causeway,
P.O. Box 1707,
Lagos, Nigeria.
Phone: 844199
846707
846708
Cable: Globefish
Attn: Mr. P. Roussinov, Managing Director
4. Universal Fishing Company Ltd.,
13, Ijora Causeway,
P.O. Box 1383,
Lagos, Nigeria.
Cable: Mackerels, Lagos
Phone: 848731, 845743
Attn: Mr. Manu Mansukhani, Managing Director

APPENDIX XI (cont'd)

5. Nigeria National Supply Co. Ltd.,
Nasco House (5th Floor),
29, Burma Road, Apapa,
(Lagos) Nigeria.
Phone: 26738, 24778
Cable: Procurers
Telex: 21560
Attn: Mr. Alhajo Dabo Mohammed

6. Sovhispan S.A.,
Tinglado Muelle Ribera,
Las Palmas de G.C.,
Canary Islands.
Phone: 27 43 58 (7 lines)
Telex: 95306 SOVP E
Attn: Mr. Manuel Navarro, Director Delegacion

APPENDIX XIICANADIAN SHIPPING SERVICES TO NIGERIA

<u>LINE</u>	<u>AGENTS</u>
Armada Lines	Protos Shipping Ltd., 407 McGill St., Suite 1004, MONTREAL, H2Y 2G3 (also offices in Toronto)
Black Star Line	March Shipping Ltd., 400 St. Antoine St. W., MONTREAL, H2Y 1K1 (also offices in Toronto, Saint John)
CNN/Navang US Africa Line	Kerr Steamships (Canada) Ltd., 360 St. James St. W., Suite 800 MONTREAL (also offices in Toronto, Saint John, Halifax)
Farrell Lines West Africa Service	Seabridge International Shipping Ltd., 620 St. James St. W., MONTREAL, H3C 1E4 (574/281-1797) (also offices in Toronto)
MedAfrica Line	S/S Steamship Co. Ltd., P.O. Box 983, Place Bonaventure, MONTREAL, H5A 1E9
NEWAL (Conventional) & RO/RO Services)	Montreal Shipping Co. Ltd., 360 St. James St., MONTREAL, H2Y 1R2 (also offices in Toronto)
Nigerian Star Line	ZIM Canada 1010 Sherbrooke Street West MONTREAL, Quebec (also offices in Toronto, Halifax)

Source: Directory of Shipping Services, IT&C,
Transportation Services Branch.

REFERENCES/BIBLIOGRAPHY

A. BIBLIOGRAPHY

Books

- Chase World Information Corporation. Chase World Guide for Exporters Bulletin, Vol. 12 No. 1, January 5, 1979. New York: Chase World Information Corporation, 1979.
- Dun & Bradstreet. World Market Guide, 1979 Exporters' Encyclopedia. New York: Dun & Bradstreet, 1979.
- FAO. 1978 Yearbook of Fishery Statistics, Vol. 46. Rome, Italy: FAO Printing Office, 1979.
- Keyser, Ethel de, ed. Trade Contacts in West Africa. London: Kogan Page in association with Export Times, 1977.
- United Nations, 1978 Yearbook of International Trade Statistics, Volume 1. Trade by Country. New York: United Nations Printing Office, 1979.

Reports

- Armitage, R.O., and Dickie, J.E. The West African Market for Fisheries Products. New Zealand Fishing Industry Board, (1979).
- DPA Consulting Ltd. Nigeria Coastal Fisheries Development Vol. 1 Feasibility Analysis. Halifax: DPA Consulting Ltd., (1979).
- Economist Intelligence Unit. Quarterly Reports and Annual on Nigeria. London: Economist Intelligence Unit, (1979).
- Agra Europe. Eurofish Report. No. 70. Kent: Agra Europe, (1980).
- White Fish Authority. European Supplies Bulletin #2, Sept. 1979. Edinburgh: White Fish Authority, (1979).
- FAO. Fishery Country Profile - Nigeria. Rome: FAO, (1978).
- World Bank. Country Economic Memorandum - Nigeria. Geneva: World Bank, (1979).

Government Documents

- Canada. Department of Fisheries and Oceans. Canadian Exports of Fishery Products, January-December, 1979. Ottawa: Economic Policy Branch, 1980.
- Canada. Department of Fisheries and Oceans. Canadian Fisheries - Primary Sector Activities January-December, 1979. Ottawa: Economic Policy Branch, 1980.

- Canada. Department of Industry, Trade and Commerce. Directory of Shipping Services. Ottawa: no date.
- Canada. Department of Industry, Trade and Commerce. Nigeria Annual Fisheries Review 1977. Ottawa: Agriculture, Fisheries, and Food Products Branch, 1977.
- Canada. Department of Industry, Trade and Commerce. Nigeria - Market for Canadian Exports. Ottawa: 1978.
- Nigeria. Central Bank of Nigeria Annual Report and Statement of Accounts, 1978. Lagos: 1979.
- Nigeria. Federal Republic of Nigeria Exchange Control Act, 1962 Notice to Importers. Lagos: 1979.
- Nigeria. Fishery Survey of Nigeria, 1975. Lagos: 1976.
- Nigeria. Third National Development Plan, revised. Lagos: 1975, 1977.
- Nigeria. Sea Fisheries Decree 1971. Lagos: Official Gazette No. 60, Vol. 58, 1971.
- U.S. Department of Commerce. Fishery Market News Report (0-29). Washington, D.C.: Government Printing Office, 1979.
- U.S. Department of Commerce. Foreign Economic Trends & their Implications for the United States - Nigeria, 79-105. Washington, D.C.: Government Printing Office, 1979.
- U.S. Department of Commerce. Overseas Business Reports, Marketing in Nigeria, OBR79-11. Washington, D.C.: Government Printing Office, 1979.

Articles

- "Nigeria: Agreements with Mauritania". World Fishing, June 1977, p. 16.
- "Nigeria Buys British Freezers". Fishing News International, November, 1979, p. 17.
- "Nigeria's NNFC Places Six Vessel Order". Fishing News International, November, 1979, p. 4.
- "Norway Exports Earn More". Fishing News International, March, 1980, p. 3.
- "Enter the Second Republic". Africa, November, 1979, p. 28.
- "Return to Square One". Africascope, July, 1979, p. 6.
- "Nigeria Raises its Oil Price to \$34.48 U.S. a Barrel". Globe and Mail, 1 March, 1980, p. B12.
- "The Federal Ministry of Agriculture and Rural Development Visits Ibru Fishing Operations". The Mermaid, Fifth Issue, 1977, p. 15.
- Idyll, C.P. "Food from The Sea of Nigeria". (no source).

B. BUSINESS CONTACTS

All importers are listed in Appendix XII

STAFF, Canadian High Commission,
New Niger House,
P.O. Box 851,
Lagos.

Osadjere Fishing Company Ltd.,
P.M.B. 1155,
33 Creek Road,
Apapa.
Capt. S. Miyata, General Manager.

Universal Trades & Exports Corp.
Banuso House,
88/92, Broad Street
P.O. Box 4825,
Lagos.
Mr. Ralph Ajoboye, Director.

Spero Commercial Enterprises,
Development House,
21 Wharf Road - 5th fl.,
Box 691,
Apapa (Lagos)

Nigerian National Shrimp Company,
Ogharefe,
P.M.B. 4070,
Sapele.
Mr. B.V.M. Uboma, Ag. General Manager.

Central Bank of Nigeria,
Tinubu Square,
P.M.B. 12194,
Lagos.
Mr. Alhaji Elias, Principal Manager,
Exchange Control Dept.

Federal Ministry of Trade,
Deputy Secretary,
Internal Trade Division,
New Secretariat,
Ikoyi (Lagos).

Federal Department of Fisheries,
Victoria Island, Lagos.
Dr. B.F. Dada, Director.
Mrs. M. Onabanjo, Senior Economist

