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

SHELLFISH

Government of Canada
Gouvernement du Canada

Fisheries and Oceans
Pêches et Océans

Industry, Trade and Commerce
Industrie et Commerce

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

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

D R A F T

Annex to the
Worldwide Fisheries Marketing Study:
Prospects to 1985

SHELLFISH [v.183]

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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:

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To all of the above, we extend our thanks.

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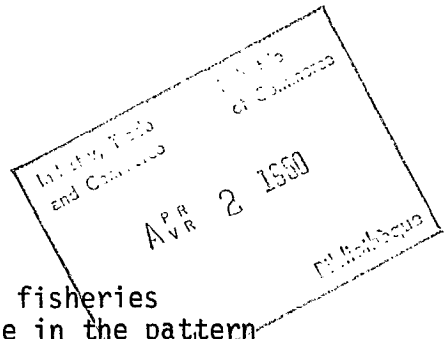
November, 1979



FOREWORD

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

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

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

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

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

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

Ed Wong

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Ottawa

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A. INTRODUCTION

Shellfish products are the luxury-price delicacies of the sea in a world of fast-rising seafood prices. The FAO predicts that world shellfish consumption will grow by 3% annually to 1985 which is a promising trend for Canada. With the phasing out of distant water fleets, production volume is expected to lag behind consumption demand thereby creating opportunities for suppliers such as Canada to gain from the resulting increase in shellfish prices.

Canada's shellfish catch of 171,000 tonnes (1977) round weight is expected to drop to 144,000 tonnes in 1981 but recover by 1985 to about 160,000 tonnes. According to current projections, total exports of Canadian shellfish could increase 14% between 1978 and 1981 to 32,774 tonnes and by 24% to 38,000 tonnes in the 1978-1985 period. The publication Resource Prospects for Canada's Atlantic Fisheries 1979-1985[1], includes the following run-down by species:

Lobster:

Recent catches are below the 1940-1972 average, an indication of increased fishing pressure. A long term improvement of up to 50% in the catch can be expected if size limits are increased and effort reduced substantially.

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[1] Resource Prospects for Canada's Atlantic Fisheries, 1979-1985, Resource Services Directorate, Dept. of Fisheries and Oceans, Ottawa, 1978.

Shrimp:

New areas are being investigated off Cape Breton, Labrador and Baffin Island which could produce expanded opportunities in addition to traditional grounds in the Gulf of St. Lawrence.

Snow Crab:

The Gulf and Newfoundland areas are predicted to remain stable with some potential for expansion in Cape Breton. Other species have commercial potential.

Scallops:

Georges Bank catches are showing signs of a downward trend due to above-average fishing and predictions are for decreased landings.

The most significant export growth potential to 1985 lies in exports of lobster in shell, scallops and crab. Japan and the European Community are expected to increase their imports to compensate for declines in domestic supplies. In fact, after the broad category "fish - fresh, chilled and frozen", shellfish will be the most important internationally traded group in the 1980's. With increases in demand and prices, consumers of crustaceans will be increasingly willing to substitute with cheaper, previously less-acceptable species. For example, Western Europeans are already

showing a new desire for North American varieties of lobster and crab to replace higher priced Norwegian and Russian products.

In the period to 1981, exports of clams and shrimps (fresh, frozen) are likely to remain static while lobster meat exports will probably decline.

Overall, the prospects for Canadian shellfish exports appear bright as Canada can capitalize on both availability of supplies and strong international demand. All major markets are expected to maintain, or expand on, current volumes by 1985.

Canada's ability to exploit these international opportunities depend on two factors:

- recognizing individual market idiosyncracies, and
- improving the appearance and quality of shellfish products.

B. POTENTIAL

The nations of Western Europe offer the greatest potential for Canadian shellfish exporters. On the whole, their economies are expanding as personal incomes continue to rise. In addition, most currencies of Western Europe have been appreciating relative to the Canadian dollar thereby making it more attractive to buy imports from

Canada. Perhaps most important, their shellfish stocks are in decline and, with trans-Atlantic transportation becoming less complicated, it is easier to consider Canada as a source of supply.

However, there are marketing barriers which still must be overcome if Canada is to fulfill its potential in Western Europe. Many Europeans are still not familiar either with Canadian shellfish species or our packaging methods. Further efforts are undoubtedly needed by Canadian exporters to improve promotion and marketing of new products and packaging.

Canadian suppliers will also have to develop new ways to speak the Europeans' language on quality. The whole food industry in Western Europe has quality as a principal concern. When breaking into such a market, it is vital that Canadian quality standards match or surpass those in Europe.

Neither the European unfamiliarity with Canadian products, nor the concern for quality should be lasting impediments for export opportunities. After all, the quantity of shellfish exports is in direct relation to the level of disposable income, which in Europe is on a strong rising trend. As the economies of Western Europe continue to outperform those of North America, Canada is expected to increase gradually her export volume of shellfish. Against such a promising outlook, Canadian exporters will need to

invest more time and money to research individual country preferences for shellfish products.

Finally, a word about competition. Some of the less developed nations have ample quantities of shellfish at prices well below ours. Quite aside from natural competitive forces, the European Community has special trade agreements to open its market to less developed nations with a narrow resource base. As a result, Canada will have to go to extra lengths to either hold or extend its market share in Europe.

The following highlights are opportunities reviewed by the country reports for the Worldwide Fisheries Marketing Study:

I European Economic Community

(a) United Kingdom

Shellfish consumption has gradually increased in the last two decades to 0.7 kg per capita in 1976. However, per capita consumption is expected to drop slightly to 0.6 kg through 1985. At present, with a population of 56 million, the market amounts to 39,200 tonnes.

The key to U.K. shellfish consumption is disposable income. As world shellfish prices rise, U.K. consumption would likely decline since incomes often lag

behind those in other countries in Western Europe. Hence, the U.K. economy, to the extent that it generates high disposable incomes for consumers, will play an important role in future market patterns. At present, U.K. lobster dealers find it more attractive to sell on the Continent than in their own market, and are therefore exporting significant quantities of their domestic catch.

In 1977, Canada supplied the majority of frozen-in-brine lobster and as imports continue to rise, Canada is expected to maintain its position. Live lobster sales are small and concentrated during the winter months, with Canada accounting for one-third of the market. However, the U.K. is concerned about gafkemia in Canadian live lobsters and consumer anxiety could pose a threat to future Canadian sales.

While Canada supplies about 20% of the U.K. crab market, increasing prices could deter sales. Shrimp enjoys good sales in the U.K., but low quality and high prices from Canada restrict opportunities in future.

(b) France

The French are seafood enthusiasts. About 25% of total fish consumption in France is made up of shellfish, and in 1977 consumers ate about 5.7 kg of shellfish for a market of 307,800 tonnes.

In future, demand for luxury seafood products, notably shellfish, will rise more quickly than for common fish species. Accordingly, France will continue as an import shellfish market, already dependent on imports for one-third of total consumption.

Canada's prospects in the French market look good. Canadian importers are in a position to supply the majority of imports of live lobster for which demand is likely to remain stable, and for frozen-in-brine lobsters for which demand could accelerate. In the shelled and canned crab market, Canada should be able to continue adding to its market share which has been increasing in recent years. French imports of scallops are predicted to rise to 10,000 tonnes in 1985,but because of increasing prices and limited production, Canada is not expected to make significant inroads in the market.

(c) Federal Republic of Germany

The Germans consume proportionately less shellfish than the French. It represents about 7% of total fish consumption. But this in no way diminishes the importance of Germany as a growing market in future. Though shellfish consumption dropped between 1976 and 1977, the decline was caused by a fall-off in domestic catches rather than demand.

In light of domestic supply problems, Germany

expects to increase its shellfish imports by about 10% annually over the next five years, starting from a base of 13,500 tonnes in 1977. The most promising export species for Canada are likely to be lobster, shrimp and mussels. As with all export marketing opportunities, Canadians have to be conscious of consumer preferences. For example, Germans prefer lobsters in the 1½-2 pound range or larger.

(d) Belgium

The Belgians are hearty shellfish consumers. Not only do they eat about 4.3 kg per person,but it accounts for about 28% of all fish consumption.

Moreover, the export outlook for Canada is promising. Overall shellfish imports have grown steadily from 26% of the total in fish to 34% in 1978. Particularly in shellfish, Canada has been increasing its share of total Belgian fish imports which already account for a whopping 80% of consumption. Shellfish imports between 1976 and 1977 grew by 37% to 456 tonnes. Even more encouraging is the outlook for the 1980's: imports from Canada could rise to 875 tonnes in 1981 and 990 tonnes in 1985.

The leading products from Canada are crab (305 tonnes in 1978) and lobster (490 tonnes in 1978) though some gains have been made with shrimps in the

shell (31 tonnes). Canada has benefited from higher prices for Norwegian lobster and Russian crabs which have encouraged consumers to switch to cheaper Canadian varieties instead.

Opportunities exist for continued slow growth in all shellfish products which Canada currently exports to Belgium. However, potential also exists for peeled and deveined shrimp and scallops with roe. As mussels now account for about two-thirds of shellfish imports, and continue to be in strong demand, Canadian exporters should investigate further opportunities for this species.

(e) The Netherlands

The Dutch are eating larger quantities of shellfish. Between 1976 and 1978 per capita consumption increased 40% to 3.4 kg compared with 12 kg for all seafood.

In the same period,Canadian shellfish imports have more than doubled to 501 tonnes though much of the product is re-exported to other EEC countries. Projections through the early 1980's call for imports from Canada to rise solidly to 710 tonnes in 1981, and to 1,120 tonnes in 1985.

Canada's most successful export trade is concentrated in lobster in the shell and fresh, frozen and canned crab meat which in all represent 90% of Dutch imports from Canada. As in Belgium, high prices for Norwegian lobster and Russian crab have been significant factors in luring Dutch consumers and importers to buy competing Canadian products. But if Canada is to exploit fully the potential of the Dutch market, quality questions will have to be addressed. If Canadian producers can eliminate blue or grey spots from canned crab, it is likely that the Canadian product would not only gain in reputation but also in price.

On the whole, exporters can expect continued growth in demand for those products already supplied by Canada. But in addition, there also appears to be potential for peeled and deveined shrimps, crab and lobster meat and scallops with roe.

(f) Italy

Per capita consumption of shellfish in Italy, currently 1.6 kg, falls between the extremes of Britain and France. There are special features in the Italian market which set it apart from others in Europe. On one level, regional differences in income affect consumption patterns,with Italians in the north more likely to buy

higher-value, higher prices fish species. On another level, consumers continue to show a preference for fresh species and are willing to pay a premium for quality. Still, high prices for fish and fish products are expected to restrain Italian demand in the early 1980's. For exporters, the answer seems to lie in being selective about the products marketed in Italy.

At present Canada exports no shellfish products to Italy,and no projections have been made for potential export volumes in the 1980's. However, importers have shown some interest in squid of the 50-300 kg size, blast frozen and in 10 kg boxes. There is apparently some demand among northern Italian importers for live lobster. The institutional trade has registered a limited interest in frozen crab packed for the 8-16 oz size range. Shrimp, either frozen or in the shell, has only a limited potential for Canada as it would compete against cheaper products from South East Asia and Africa.

On a more optimistic note, good possibilities are foreseen for Canadian snow crab if it can be offered at intermediate prices between the high quality Russian and lower-grade Thailand products.

(g) Greece

Considerable uncertainty surrounds the

outlook for consumption in the next decade. However, based on current assumptions, total fish consumption could be 15 kg by 1986, still below the level of 16 kg in 1972.

Officially, Canada appears to export no shellfish products to Greece although Greek data suggests a small volume of 2 tonnes of canned crab, mussels and oysters were imported in 1978.

For the future, there is very limited potential in the Greek market for Canada. Aside from Greek incomes lagging those of Western Europe, thereby curbing the demand for luxury products, other variables conspire to restrict opportunities for Canadian exporters. Greek price ceilings, import quotas, membership in the European Economic Community and future bilateral fishing arranagements all suggest Canada has little scope for exploiting the Greek market. Only in the ship handling trade is there some interest for limited quantities of canned snow crab and canned lobster meat. Even here, though, with such small volumes involved, it is unlikely to be of much attraction for Canada.

II Other European countries

(a) Spain

Spain is the ninth most important per capita fish consumer in the world at about 40 kg live weight. Even

though the level is not expected to increase significantly, the strong domestic market coupled with a healthy tourist industry will continue to keep Spain a major fish consumer.

Although specific data are not available, shellfish play an important role in overall fish consumption. In 1977, the domestic shellfish catch amounted to 245,800 tonnes with another 50,300 tonnes (including squid) imported from abroad.

With the exception of Canadian lobster-in-brine which is a relatively new product whose outlook is still unclear, there is little potential for Canadian shellfish exports. Since the Spanish are either unfamiliar with Canadian species or resistant to high Canadian prices, it is possible that with increased exposure Canadian producers could penetrate the market more successfully than at present.

(b) Portugal

The Portuguese are the third most important per capita consumers of fish though, because of their population of 10 million, the actual volume is small (16,500 tonnes).

Portugal's serious economic and political problems make it almost impossible to consider as a strong market. In addition, all fish imports must be authorized

by the government which imposes duties of up to 200% on shellfish products.

III United States

By far the largest consumer of Canadian shellfish products is the U.S., helped in no small part by its familiarity with our products and proximity to our harvesting area. Though per capita consumption of fish is low, 15.7 kg round weight, interest is growing in seafood, and by 1985 consumers could be eating 17.2 kg round weight per person annually.

Consumption by species from 1972 to 1985 indicates significant increases for shellfish:

	('000 tonnes round)		
	1973	1985	% increase
Scallops	13	19	46%
Shrimp	344	455	32%
Lobster	93	111	20%
Crab	141	146	10%
Oysters	28	37	32%
Clams	50	68	36%
	669	836	

Scallops constitute the largest quantity of shellfish exports which have almost doubled to the U.S. between 1974 and 1978. In recent years, prices have risen to the highest ever and as a result some resistance to these prices is now being encountered. The price trend is likely to continue upward as the Georges Bank harvest is expected to decline, leading to higher vessel operating costs. Higher costs and reduced supplies suggest that Canadian producers will continue to enjoy strong prices in their principal scallop market.

The United States now absorbs the majority of Canadian lobster catches and will continue to be our most important customer, mostly in the fresh or live form. However, as with scallops, U.S. buyers have been resisting higher prices from Canada by buying lobster or crawfish tails from the Caribbean and southern Atlantic waters. The retail canned lobster market is dwindling as the high prices prohibit proper display. However, larger size limits are being discussed for the New England lobster fishery and, if implemented, could have a negative bearing on Canadian lobsters entering the U.S.

While Canadian shrimp has been more popular in Western Europe, there is greater potential in future for more sales to the U.S. especially if the recent oil spill in the Gulf of Mexico adversely affects the Texas fishery, and if Canadian prices remain competitive. Mid-west and Southern U.S. cities, as prosperous and growing cities, are worthy of special note for Canadian shellfish exporters.

A major cloud on the horizon for increased Canadian exports is the extent to which the U.S. becomes self-sufficient in its own fish resources. While this was one of the objectives of their Fishery Conservation and Management Act of 1976, it is too soon to tell how successful they will be in achieving their objective. In this atmosphere of attempts at self-reliance, there have been some unsuccessful efforts by U.S. fishing associations to impose extra custom duties on Canadian imports.

Given these considerations, it appears that although the U.S. will continue as our primary shellfish market, the large increases in exports experienced this decade are not likely to be repeated in the 1980's.

IV Japan

Shrimps and prawns are the largest group of fisheries products imported into Japan, valued in excess of $1 billion, and representing 31% of all fish imports in 1978. Though domestic landings are not expected to expand, total imports could reach 156,000 tonnes in 1981 and 162,000 tonnes in 1985.

There is good potential for other shellfish products such as sea urchins, horseclams, geoducks and lobster, particularly for the live market. In 1978, 2,315 tonnes of sea urchins were imported with 487 tonnes imported from the U.S.

(V) Scandinavia

(a) Sweden

Swedish consumption of seafood products has levelled off and is expected to hover around 16.8 kg for the next few years. Within that trend, however, the Swedes are altering some fish-eating habits. Over the past 10 years, they have been shifting from fish products to frozen fillets and other processed fish, as incomes and demand for convenience foods accelerated. Prepared dishes such as crab puffs and breaded products are becoming more popular. In addition, shellfish consumption has increased from 0.4 kg in 1960 to 1 kg in 1978, which is a measure of demand for luxury seafood products. Government subsidies on meat create a bias against fish, but it also follows that any decrease in the subsidies would narrow the relative price difference with fish. At present imports of Canadian shellfish include:

		1977 (tonnes)	
		Total	Canada
Lobster	- in shell, frozen	126	122
	- canned	49	42
Crab	- meat, frozen	496	147
	- canned	466	147
Shrimp	- in shell, frozen	6,695	0
	- peeled, frozen	3,943	118
	- canned	346	0
Other shellfish - mussels, canned		1,826	0

Canada is the most important supplier of lobster to the Swedish market (97% of whole, cooked, frozen). Whole, cooked, frozen-in-brine lobster, minimum size 350 grams, as well as canned products, have been marketed successfully. Moderate growth in these products exists for the future.

Canada supplied considerable quantities of canned and frozen snow crab during 1977,and importers are looking for additional supplies of quality product. The outlook is good for the near future.

Consumption of cooked and peeled Pandalus Borealis is increasing in Sweden,and imports are increasing to meet demand. However, it is essential that only quality products be shipped to this market. The outlook is good for Canadian exporters.

(b) Finland

Per capita consumption of seafood is expected to remain fairly constant, around 18.5 kg, for an indefinite period. Lobster is currently the key import from Canada which, in 1977, supplied more than half of the frozen import market to Finland. Projections for the 1981-85 period are as follows:

	tonnes	
	1981	1985
Frozen lobster	2.0	5.0
Canned, other than shrimp and crab	2.0	5.0

Finland is a relatively small market with a conservative attitude among consumers towards accepting new products in frozen or "ready prepared" form. As a result, export prospects for Canadian shellfish are not expected to improve significantly. As shown from the forecasts above, only modest increases seem probable for frozen lobster, and canned shellfish other than shrimp, and crab by 1985. Despite the modest tone to export opportunities, some potential does exist for introducing canned or hot-packed snow crab, I.Q.F. or vacuum-pack frozen shrimp and frozen-in-brine, 250 g lobsters.

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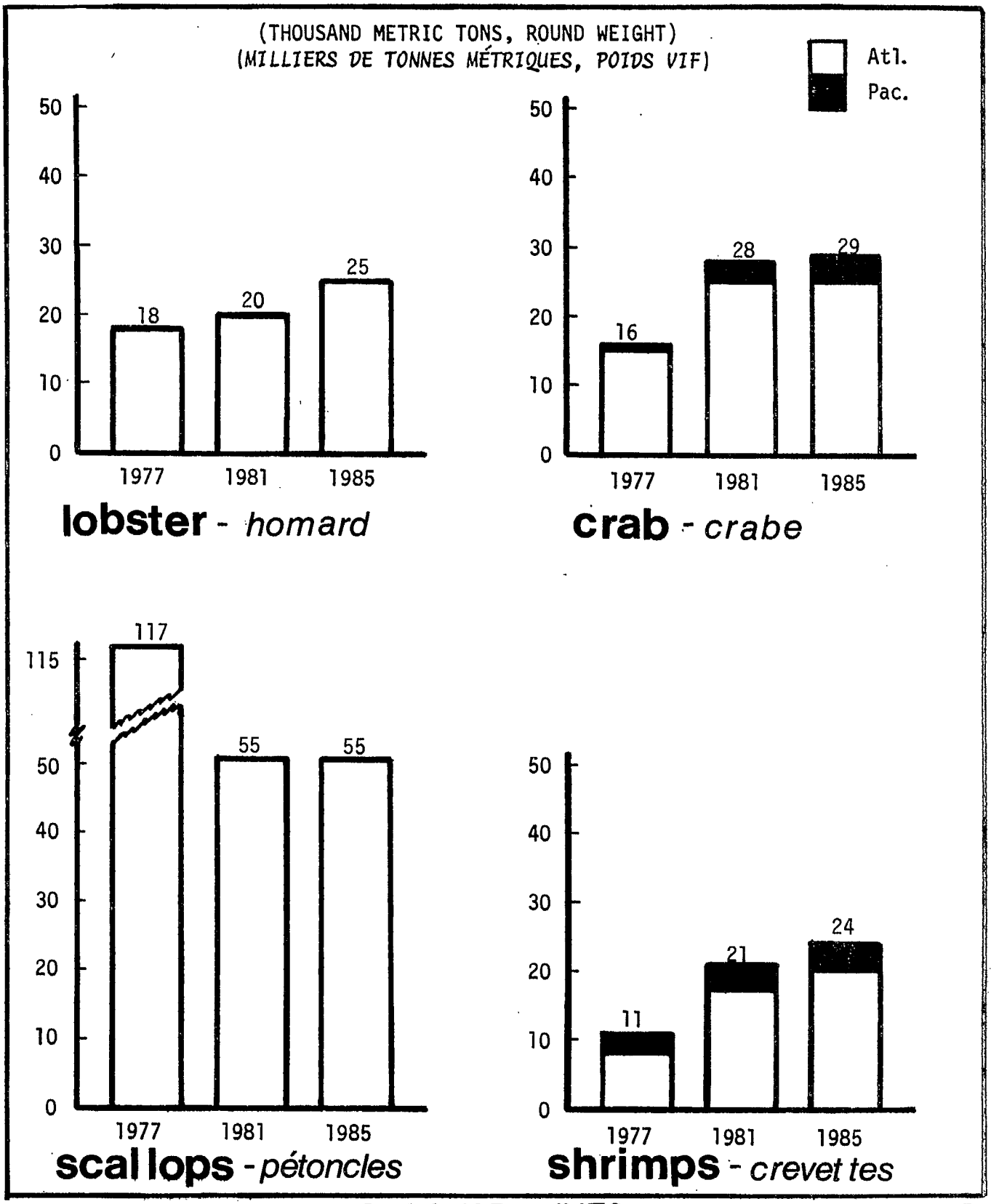
Figure 1

POTENTIAL CANADIAN SHELLFISH LANDINGS, 1981-1985



POTENTIEL DE PRISES CANADIENNES DE FRUITS DE MER

Figure 2

Canadian Shellfish Export Projections - 1985

(THOUSAND METRIC TONS, PRODUCT WEIGHT)

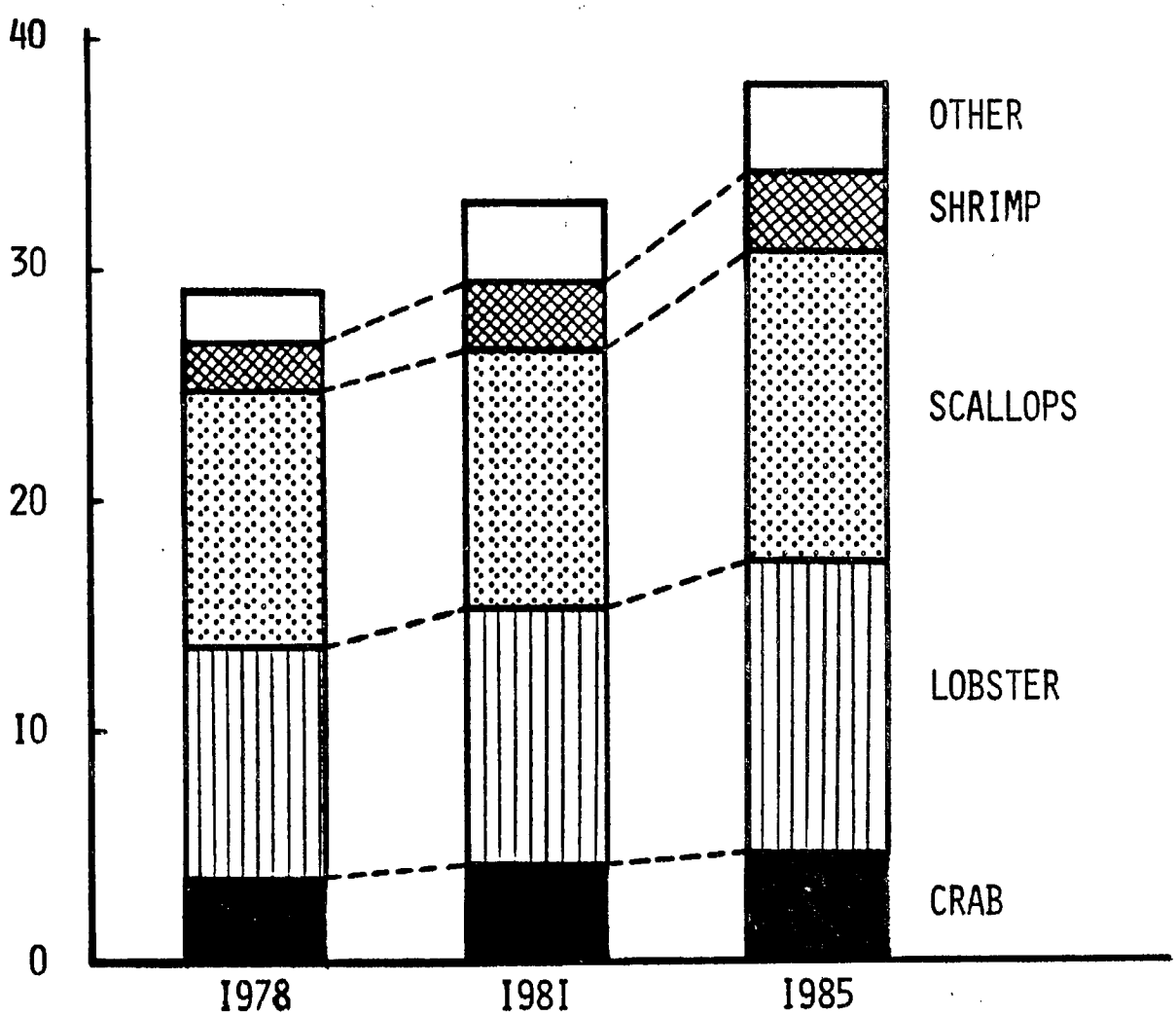


Figure 3

1985

Canadian Export Projections of lobster (in shell fresh or frozen)

(METRIC TONS, PRODUCT WEIGHT)

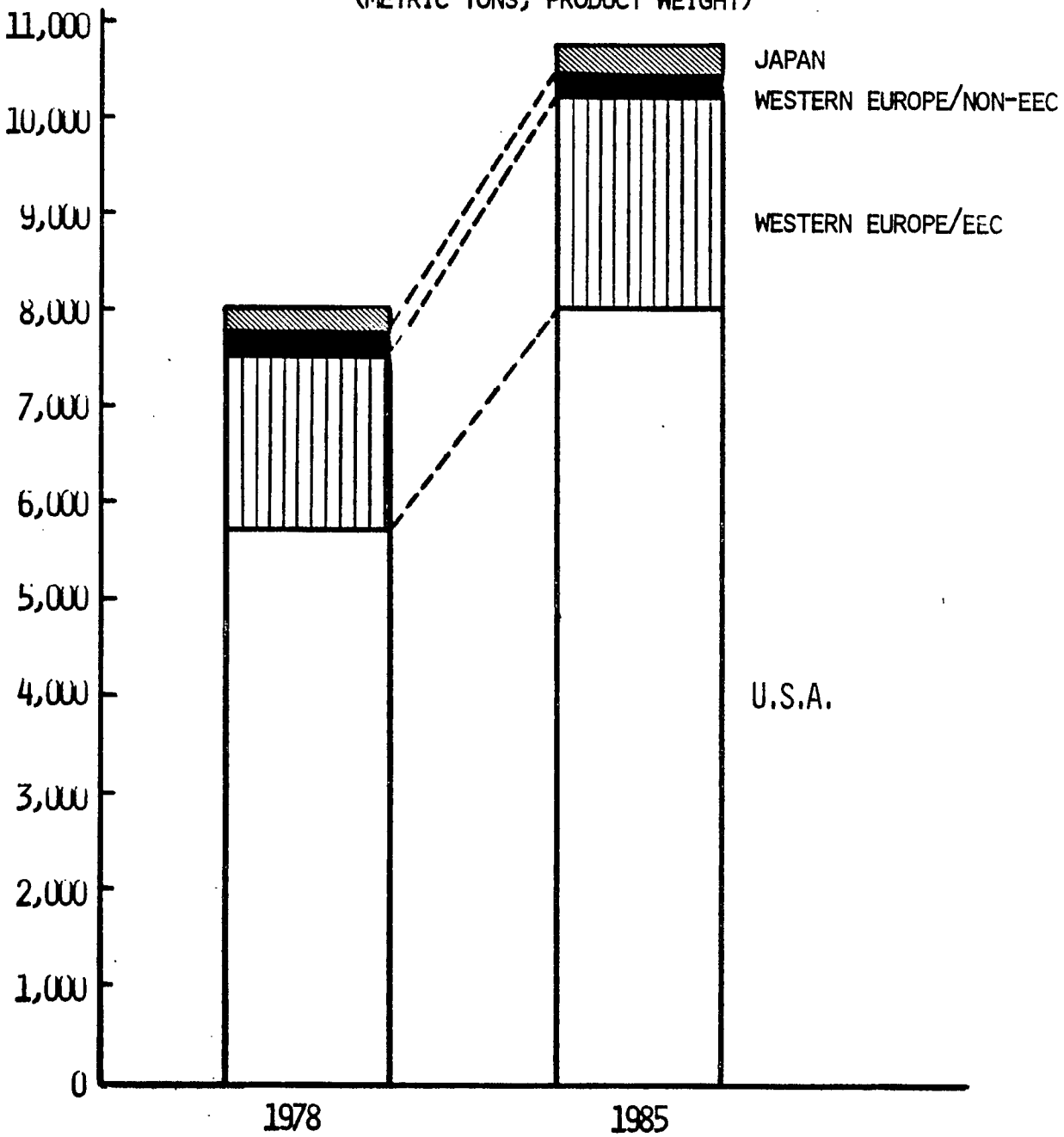


Figure 4

1985

Canadian Export Projections of frozen Scallops

(METRIC TONS, PRODUCT WEIGHT)

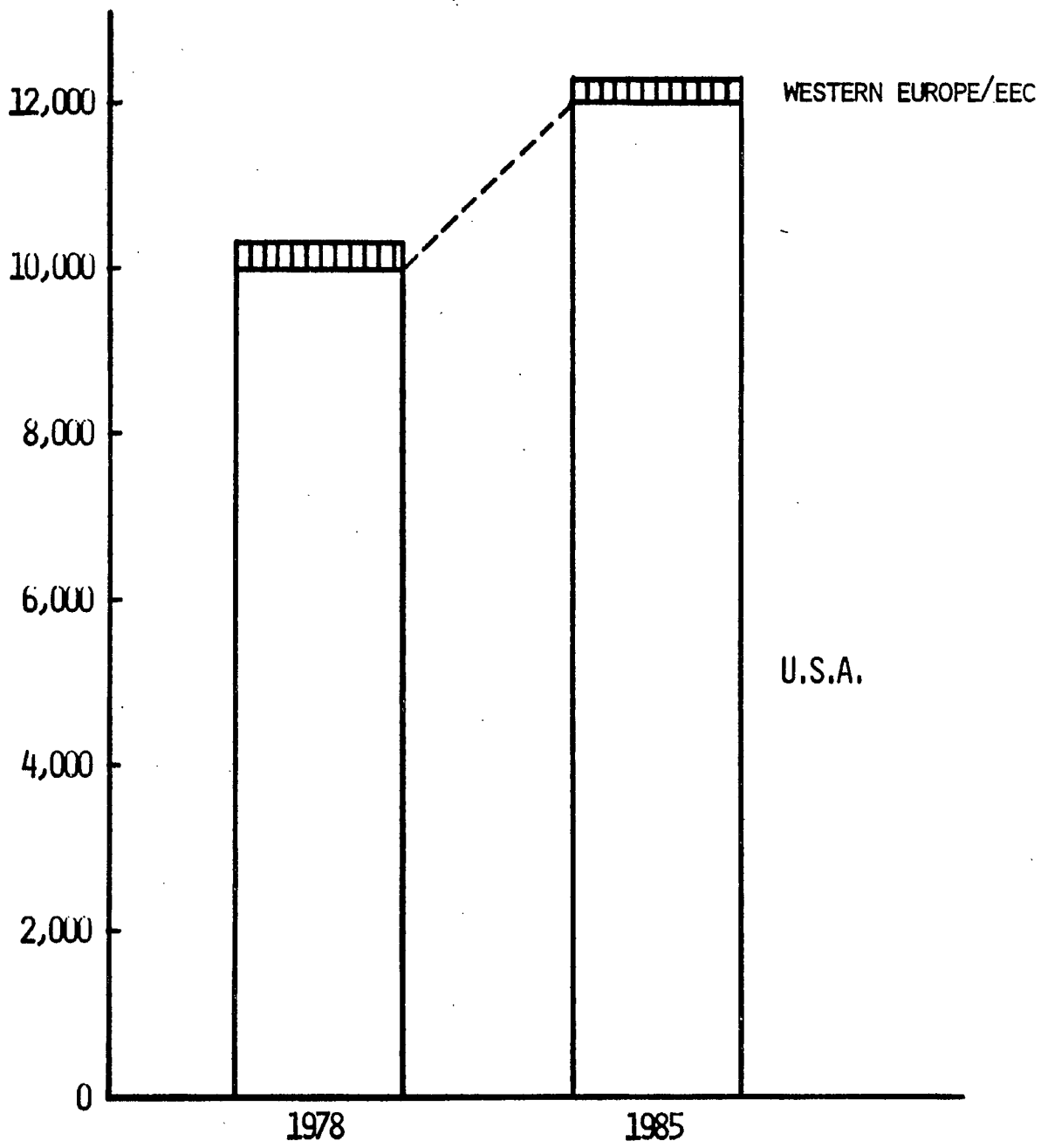


Figure 5

1985

Canadian Export Projections of Canned Crab

(METRIC TONS, PRODUCT WEIGHT)

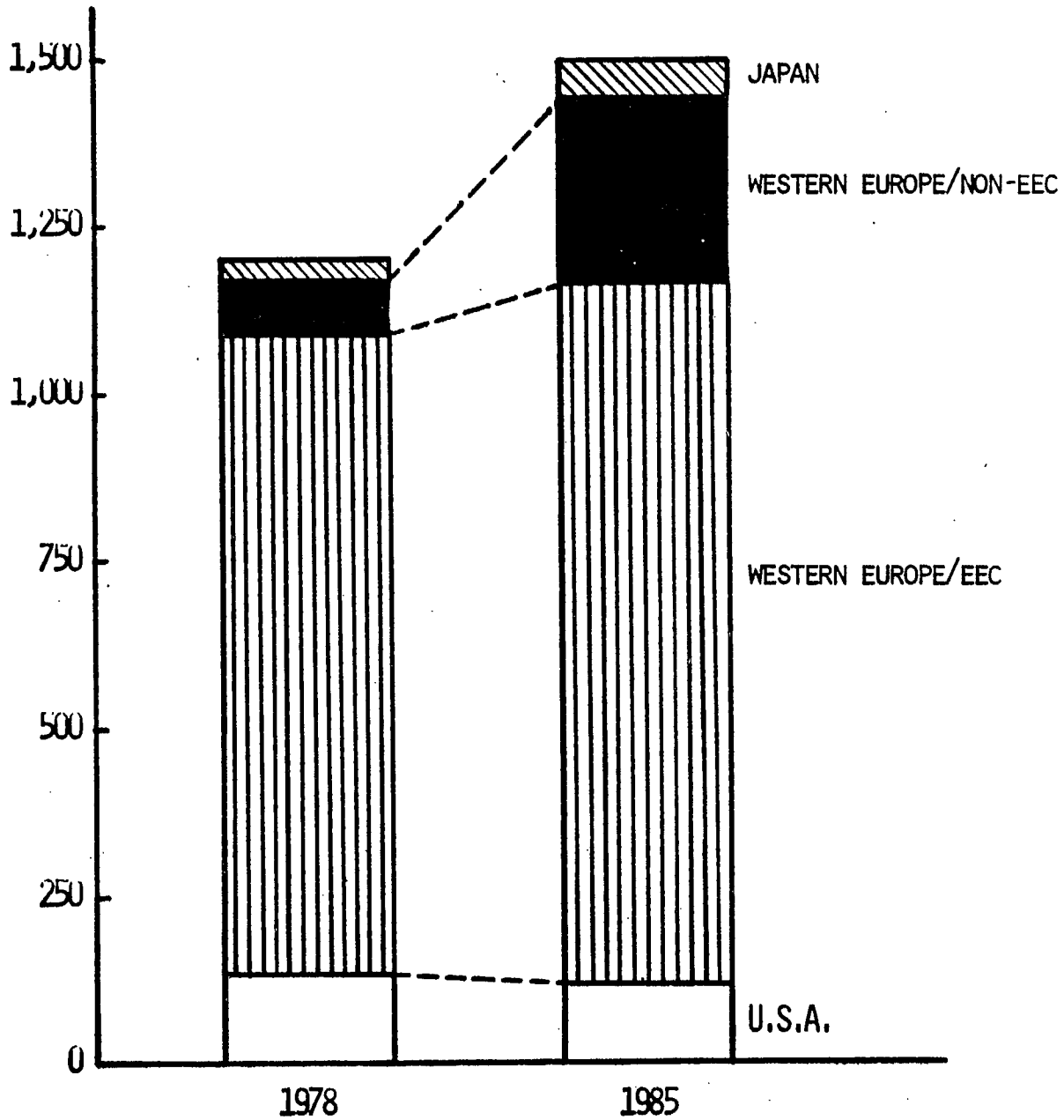


Figure 6

1985

Canadian Export Projections of fresh or frozen Crab

(METRIC TONS, PRODUCT WEIGHT)

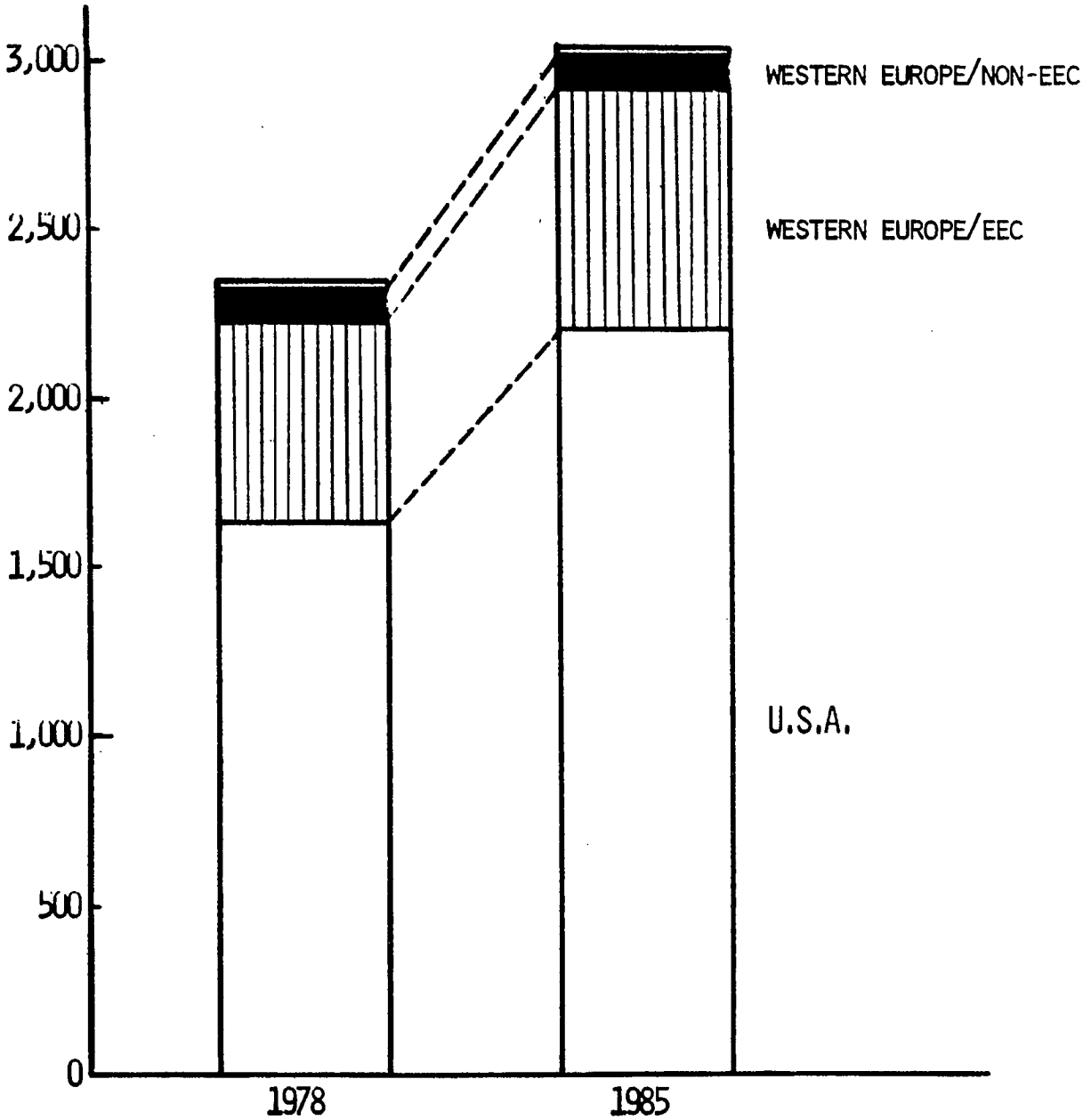
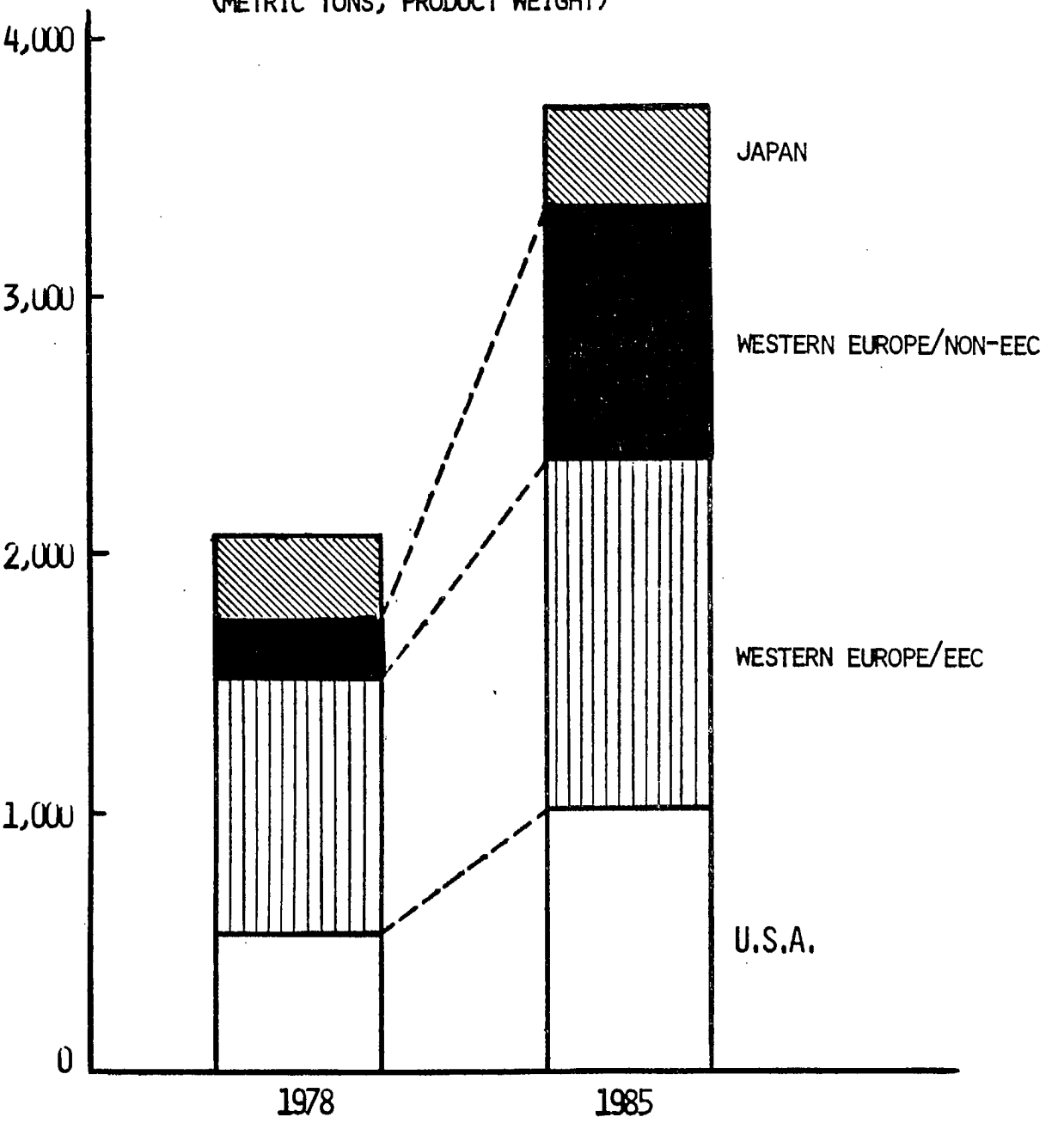


Figure 7

1985

Canadian Export Projections of Shrimp & Prawns

(METRIC TONS, PRODUCT WEIGHT)



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CANADIAN EXPORTS

Metric Tons

SHELLFISH	Actual			Potential	
	1974	1976	1978	1981	1985
	Q	Q	Q	Q	Q
Clams, Fresh or Froz.	703	744	1,699	1,730	1,835
Crab, Fresh or Froz.	984	1,240	2,366	2,755	3,035
Crab, Canned	342	687	1,204	1,355	1,500
Lobster, In Shell Fresh or Froz.	7,251	7,340	7,933	9,277	10,757
Lobster Meat, Fresh Chilled Boiled	47	84	29	100	120
Lobster Meat, Froz. incl. Boiled	850	1,258	1,496	1,365	1,510
Lobster & Pdts. Canned	205	182	358	130	150
Scallops, Fresh or Chilled	895	1,110	940	1,000	1,200
Scallops, Frozen	4,599	8,149	10,297	10,205	12,285
Shrimps & Prawns Fresh or Froz.	576	1,771	2,068	2,720	3,720
Shellfish & Products N.E.S.	68	44	482	2,137	2,240
TOTAL	16,520	22,609	28,872	32,774	38,352

CANADIAN EXPORTS

Metric Tons

LOBSTER, in shell fresh or frozen	Actual			Potential	
	1974	1976	1978	1981	1985
U. S. A.	6,604	6,648	5,742	7,000	8,000
Western Europe/EEC	593	609	1,765	1,895	2,290
Western Europe/Non-EEC	28	58	216	182	217
Japan	19	18	194	200	250
Far East	1	-	3	+	+
Caribbean	-	-	-	+	+
Other	6	8	11	+	+
TOTAL	7,251	7,340	7,931	9,277	10,757

CANADIAN EXPORTS

Metric Tons

SCALLOPS, Frozen	Actual			Potential	
	1974	1976	1978	1981	1985
U. S. A.	4,555	8,093	9,932	10,000	12,000
Western Europe/EEC	36	24	340	180	250
Western Europe/Non-EEC	-	-	7	10	15
Japan	-	-	-	-	-
Far East	-	17	1		
Caribbean	6	15	16	15	20
Other			2		
TOTAL	4,597	8,149	10,298	10,205	12,285

CANADIAN EXPORTS

Metric Tons

CRAB, Canned	Actual			Potential	
	1974	1976	1978	1981	1985
U. S. A.	104	66	135	120	120
Western Europe/EEC	175	506	959	975	1,045
Western Europe/Non-EEC	53	115	79	230	295
Japan	-	-	25	30	40
Far East	10	-	5	+	+
Caribbean	-	-	1	+	+
TOTAL	342	687	1,204	1,355	1,500

CANADIAN EXPORTS

Metric Tons

CRAB, Fresh or Frozen	Actual			Potential	
	1974	1976	1978	1981	1985
U. S. A.	693	652	1,635	2,000	2,200
Western Europe/EEC	109	417	609	650	720
Western Europe/Non-EEC	110	150	101	90	100
Japan	64	5	2	+	+
Far East	-	8	15	15	15
Caribbean	9	8	4	+	+
TOTAL	985	1,240	2,366	2,755	3,035

CANADIAN EXPORTS

Metric Tons

SHRIMP & PRAWNS	Actual			Potential	
	1974	1976	1978	1981	1985
U. S. A.	153	782	530	800	1,000
Western Europe/EEC	383	669	978	1,200	1,340
Western Europe/Non-EEC	39	290	210	600	960
Japan	-	13	326	100	400
Far East	1	14	19	20	20
Caribbean	-	3	-	-	-
TOTAL	576	1,771	2,063	2,720	3,720