ANNEX TO THE WORLDWIDE FISHERIES MARKETING STUDY: PROSPECTS TO 1985

FRANCE

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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

FRANCE [v.4]

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

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E.W.
July, 1979

FOREWORD

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

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

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

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

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

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

Ed Wong

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Fisheries Economic Development & Marketing
Department of Fisheries and Oceans

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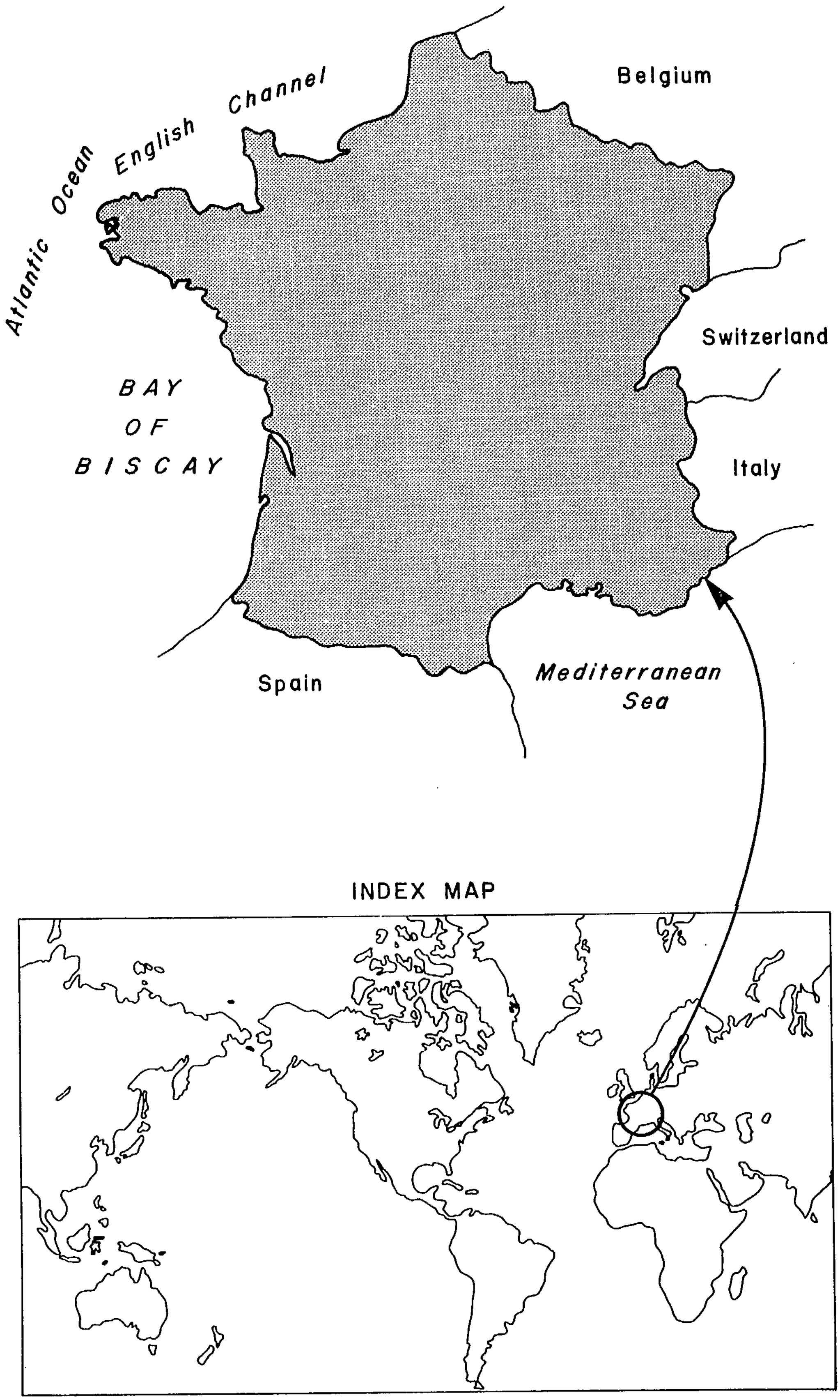
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A. DEMAND FOR FISH

France is a bouyant market for fish and fisheries products based on her population's traditional interest in food and beverages and preoccupation with the preparation and presentation of food products. There is an increasing awareness of fish and seafood as people realize that these items lend themselves to preparations limited only by the cook's imagination and financial means, or those of his customer.

The fish industry actively promotes trade by:

- seeking new sources of known species,
- seeking new species to replace those which have become scarce or prohibitively expensive.

In the sections that follow, we discuss the existing and projected patterns of fish consumption in France. The product mix of finfish and shellfish in fresh, frozen, cured and canned forms is reviewed. The roles of individual and institutional consumers are examined, to give insight into future consumption trends.

(a) Domestic Fish Consumption

According to FAO, per capita consumption of fisheries products in France averaged 21.5 kilograms (product weight) per annum during the 1972-1974 period and is projected

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Table 1 : DOMESTIC FISH CONSUMPTION, 1977, 1981 and 1985

	1977	1981	1985
1. Per capita consumption (edible or product weight in kg.)	22.0	23.0	24.0
2. Population (in millions)	54.0	55.0	57.0
3. Domestic market (line 1 x line 2 in '000 tonnes)	1,188.	1,265.	1,368.

	1977/1981	1977/1985
4. Percentage increase Overall	6.5%	15.2%

to reach 23.5 to 24.1 kg by 1985. Other sources show 22 kg, 23 kg, and 24 kg for 1977, 1981 and 1985 with population projections stated at 54.55 and 57 million for the same years. However, the straight line mathematical operation of landings (682,700 tonnes) plus imports (373,100 tonnes) less exports (97,400 tonnes) using actual product weight rather than that converted to live or landed weight provides a 1977 per capita consumption figure of 17.8 kg (39 lbs) for a 54 million population. These figures exclude fish oils, meal and fats, fit and unfit for human consumption and includes trade in canned products.

More detailed per capita consumption figures are shown in Table 2.

Table 2: Detailed Per Capita Consumption of Fish in Kilograms for 1977

	Fresh and refrigerated		Frozen		Salted, cured or dried		Canned		Total	Proportions %
Finfish	7.8	(44%)	3.1	(17%)	0.3	(2)	0.88	(5%)	12.1	(68)
Shellfish	5.12	(29%)	0.33	(2%)	-		0.25	(1%)	5.7	(32)
Total	12.92	(73%)	3.43	(19%)	0.3	(2%)	1.13	(6%)	17.8	(100)

The consumption of frozen fish in France is relatively low. Frozen shrimps, trout and other products still requiring preparation by the cook are more popular than frozen prepared dinners. The total consumption of frozen prepared dinners is only 3-4,000 tonnes per annum. The main producers are Findus, about 1,500 tonnes and Cofralim (Pimel-Viragel), about 1,000 tonnes. The dinners contain two-thirds fish and one-third other ingredients.

In 1976, seafoods represented 20% of the total frozen foods consumed in France, increasing to 22% in 1977 or a total of 208,747 tonnes. This volume represents a 32.5% increase in domestic consumption since 1975. By category, frozen finfish increased 29%, crustaceans 63% and molluscs 47%, - impressive gains albeit from a relatively small base volume compared to North America. Cod represented 40% of total production but the use of horse mackerel and hake increased to 8% and 3% respectively, with saithe at 13%. Production is mostly concentrated in the fish sticks or breaded-prepared dishes. In the crustaceous sector, crab, shrimp, Norway lobster and crayfish were the leading species. Lack of domestic supplies required imports of 16,935 tonnes in 1977, an increase of 61% over 1975. Molluscs, frozen squid, octopus and squid are increasing in popularity. However, the major item remains scallops with demand up by 50% since 1975.

(b) Patterns of Consumption

Retail sales of fresh fish are an important factor in the marketplace, limited only in the long term by the price difference between fish and meats. The hotel/restaurant sector seems to be thriving despite rising prices of fish and seafoods, as customers appear oblivious to escalating costs of "eating out".

Sales of live products are limited to species such as shellfish, for which sales are largely seasonal. Crustaceans, mainly lobster, are of considerable interest to the Canadian industry. However, sales are equally periodic though demand may rise year-round depending on availability, quality and price.

Trade in frozen products continues to increase with the main items being frozen fish, fillets and portions for the hotel, restaurant and institutional (HR & I) trade. Second are frozen fish, whole or in portions (fillets/slices/chunks) for retail sale and lastly, prepared dishes ("plats cuisinés") also for the retail market. Sales of frozen crustaceans are expected to increase providing that prices do not surpass levels of attractive substitutes.

Retail sales of frozen foods should increase still further as refrigeration facilities improve in France. The only possible factor that could reduce demand is consumer resistance to marked price increases. Continued increase in consumption also depends on trends in HR & I market, which is thought to account for up to 40% of prepared foods use and perhaps as much as 80% of the frozen foods volume.

Demand for fish and seafood in France will continue to grow, though at a slower pace for the entire market and product range. However, as the base volume is large, the potential is worth tapping. It is also felt that the higher priced luxury species will be in increasing demand, almost assuredly surpassing the rate of increase for more common species, particularly in the HR & I and fresh retail trade. Frozen boneless portions and fillets will continue to increase in popularity with the institutional market, depending on their price differential with meats such as beef, pork and poultry.

With demand for fish rising in France at a time when the French fishing fleet's ability to maintain traditional levels of landings is uncertain, there seems to be a good possibility for increased import sales. In 1977, for instance, overall imports rose in value to FF 3.1 billion, an increase of 29% over the previous year. The French market for imported frozen fish improved even more that year, increasing by 46% in volume and 82% in value.

B. SUPPLY OF FISH

(a) Fish Stocks

While demand remains strong, the ability of the French fishing fleet to achieve larger landings has been called into question. The main reasons for this are restrictions placed in recent years on the French fleet's activities in European Economic Community (EC) and other waters, coupled with low levels of stocks in popular species in France's traditional fishing grounds.

It is felt in private industry and government circles that, because of France's compliance with EC quotas in Community waters, TAC's will inevitably be lower than actual past landings. Also, it is believed that such factors as traditional presence and proportionality may be retained at least for continental Europe. France's allocations are therefore expected to be definitely lower than landings in the recent past. As well, activity by the French fleet in the Baltic and North Seas is expected to decrease. However, in the absence of a "Common European Fisheries Policy", these views are hypothetical at best.

Stocks of groundfish and pelagic species highly utilized by West Europeans, and caught in traditional grounds are said to be at an all-time low level. These species, with which Canadian products could compete successfully, are expected to recover extremely slowly as all countries press for maximum utilization of their fishing units to prevent run down of their respective fleets through selling off, scrapping, or deterioration due to non-use.

Consequently, France and other EC countries are expected to insist on the highest possible TAC's, thus extending the fishery recovery period, but concurrently maintaining the fishing capacity and efficiency of their fleets in anticipation of eventual recovery of stocks. The harvesting capability of the French fleet is expected to remain constant despite a reduction in a number of mostly older, smaller, inefficient boats, as new larger, greater-capacity and higher-speed trawlers designed particularly for tuna and sardine fishing begin operation.

Other fishing restrictions have added to the uncertainties. The French fleet has been severely restricted if not blocked altogether in areas off India, Thailand, Singapore, Malaysia and the People's Republic of China, whose respective fleets are expected to operate with increased intensity.

The French fleet has also suffered curtailed activity off the Canadian Atlantic coast, according to a reciprocal schedule between both countries. Activity will continue in the Gulf of St. Lawrence for the term of the present agreement.

Despite these constraints, French fishing companies have performed reasonably well. French authorities confirmed the satisfactory operation of the French fleet for 1977 and the gradual recovery of the industry as reported to the OECD.

Landings surpassed 700,000 tonnes (including fish by-products), a 2.4% increase over 1976, for a value of FF 3.3 billion, up 15% over 1976. These results are especially encouraging since 1977 was the first year in which severe quotas were imposed on all Community fleets in third country and EC waters.

A decrease in production of herring and bluefin tuna caused a global reduction in the fresh fish sector. Conversely, industrial trawlers were particularly successful with redfish, at the expense of saithe and haddock. Notwithstanding lower fresh fish landings, their landed value rose 14%. An interesting rise occurred in the crustacean sector, up 8% in tonnage and 6% in value. Mussel production increased considerably by 14% in tonnage and 19% in value.

Increasingly restrictive fishing conditions imposed on distant water trawlers were reflected in reduced landings of frozen fish by 10% even though the value increased 34%. In view of poor results obtained by distant water trawlers operating for Cape hake in 1977, interest was diverted to tropical Atlantic coastal sectors for sardinellas and Senegalese hake.

Activity in the 5 main ports decreased 4% whereas value of landings increased 17%. Overall exports increased 22% in value but declined 5% in volume. All of which indicates rising costs and product prices.

As with other consumables, the overriding element of the French fisheries policy consists of seeking self-sufficiency by product or a favourable trade balance within general commodity groupings. The French Government is therefore encouraging its fishing industry to enter into cooperative arrangements to achieve those objectives and maintain highest possible employment levels and fleet utilization. Government assistance, however, is seen in the short-to-medium term until a Common European Fisheries Policy is developed.

According to French Government officials, the French fishing industry was slower in studying possibilities abroad, and entering into joint ventures and other cooperative arrangements with foreign industries, than were other European countries. It was apparently felt that limited scope existed for joint ventures except in the area of luxury species, or species not preferred by North Europeans.

Medium-and-lower value species were left to fleets of other European fishing states. As well as being more aggressive in sourcing stocks and maximizing fleet utilization, marketing efforts by other European nations also surpassed those of the French in both Europe in general, and France.

Consequently, initial French efforts were directed towards the African coast, which yields considerable volumes of shrimp, crawfish, langoustine, tuna, sole, monkfish, cuttlefish and other species. The emphasis is not expected to change and may even increase as this activity occurs off the coast of present or previous French colonies. At worst, France will need to pay a higher price for its negotiated fishing rights. It is anticipated that assistance will be offered in the development of local fishing fleets, on-shore production facilities and training of local fishermen. French importers have been associating with French fleet operators, who will train local crews in exchange for access to fishing zones. The importer will market the catch in France.

Additionally, a study by the FIOM (Fond d'intervention et d'organisation des marchés) is underway which will lead to the conversion of some elements of France's distant waters fleet to tuna fishing, primarily for operation more than 200 miles off the coast of Peru as well as within and beyond the 200 mile zone off the African coast.

Government assistance amounted to FF 99.6 million in 1977 including a FF 53.8 million cost related to maintaining a research vessel during the albacore season, and over FF 25.5 million used for market stabilization and assistance at the production level. Total support was equivalent to 3% of the overall value of production at the landing stage (FF 3.365 billion).

The species landing projections in Table 3 are subject to a number of variables including:

- effects of a "Common European Fisheries Policy",
- TAC's established in EC zones,
- quotas by country based on TAC's in EC zones,
- EC or individual country stock management policies and effectiveness of controls,
- competition in stock sourcing among European nations,
- stock recovery rate by fishing zones as it affects density of fish stocks and medium-to-long term resource management policies,
- degree of government assistance and subsidies,
- volume of over-the-side sales,
- modification of the French fishing fleet in types of units rather than total capacity,
- relative market price levels by species within the finfish and shellfish product sectors,
- world fisheries price levels and trends,
- consumption patterns,
- availability of imports at prices acceptable for the French market,
- access to export markets,
- cooperative agreements including joint ventures with foreign fishing industries,
- level of access to foreign fishing zones within 200 mile zones and quotas allocated,

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TABLE 3 LANDINGS BY SPECIES, 1976, 1977, 1981 and 1985

(thousand tonnes round weight)

		1976	1977	1981	1985
1.	Cod (cabillaud)	28.1	26.8	21.0	15.0
2.	Haddock (aiglefin)	13.8	12.0	9.0	4.0
3.	Redfish (sébaste)	1.5	5.9	1.5	1.0
4.	Turbot (turbot)	0.632	0.670	0.60	0.60
5.	Halibut (flétan)	0.253	0.306	0.25	0.25
6.	Pollock (lieu jaune)	5.7	5.3	5.0	4.0
7.	Hake (merlu)	17.2	17.5	15.0	12.0
8.	Flatfish - other (p. plats)	42.1	42.7	35.0	30.0
9.	Grenadier (grenadier)	-	-	-	-
10.	Capelin (capelan)	0.009	0.028	0.03	0.03
11.	Herring (hareng)	20.4	3.7	5.0	8.0
12.	Mackerel (maquereau)	34.7	36.6	38.0	40.0
13.	Salmon (saumon)	0.002	-	0.001	0.001
14.	Other finfish (autres p.)	273.7	283.2	290.0	300.0
15.	Squid (calmar)	4.8	5.7	6.0	7.0
16.	Lobster (homard)	0.340	0.374	4.0	4.3
17.	Crab (crabe)	16.5	19.2	17.0	17.0
18.	Scallops (pétoncles)	22.0	18.8	17.0	15.0
19.	Shrimps (crevettes)	2.0	1.8	1.7	1.6
20.	Other shellfish (autre crustacés)	153.3	161.1	180.0	190.0
	TOTAL	637.037	641.678	646.081	649.781

- effectiveness of fishing effort and number of fishing units beyond 200 mile zones,
- undetermined and innumerable political and social considerations.

(b) Processing Activities

The French canning industry employed 7,379 persons in 1977, down 9.5% from 1975. During the same period, labour costs increased 20.3%. In 1977, four of fifty-two firms engaged in canning controlled 53% of the market. The major species - sardines, tuna, mackerel and herring - accounted for over 90% of production. The bulk of the sardine pack (54%) is in oils other than olive or peanut and an increasing amount (16% at present) is in tomato sauce. About half the total pack of tropical and white tuna is "au naturel", without oil or other ingredients. The remainder is canned in olive or other oils and in tomato suace. Marinated mackerel represented 77% of the production with 15% in tomato sauce. The bulk of canned herring consumed in France (80%) is imported as French processing of this species is directed towards smoking followed by marinating. The French canning industry is hopeful that the 1980's will bring added activity with the identification of a 10 million tonne stock of "poutassou" - blue whiting off the Faroe Islands and the possibility of developing a market for horse mackerel. A degree of pessimism however hangs over the

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Table 4 - LE MARCHE DE PRODUITS SURGELES ET CONGELES

CONSUMPTION OF FROZEN AND DEEP FROZEN FOOD

1977

		PRODUTION PRODUCTION	IMPORTATION PORTS	EXPORTATION EXPORTS	MARCHE INTERIEUR DOMESTIC CONSUMPTION
POISSON - FISH	S DF	39,702	26,325	5,458	60,569
	C F	5,713	9,281	1,912	13,082
	T T	72,596	49,097	18,279	113,414
	TOTAL	118,011	84,703	25,649	177,065
CRUSTACES - CRUSTACEOUS	S DF	1,262	1,602	194	2,670
	C F	753	13,592	1,277	13,068
	T T	221	1,381	---	1,602
	TOTAL	2,236	16,935	1,471	17,340
MOLLUSQUES - MOLLUSC	S DF	1,042	1,669	531	2,180
	C F	4,638	9,572	7,731	6,479
	F T	5,007	1,458	782	5,683
	TOTAL	10,687	12,699	9,044	14,342
GRAND TOTAL		130,934	113,977	36,164	208,747

S = SURGELE PREPARE　　DF = DEEP FROZEN PREPARED
C = CONGELE PREPARE　　F = FROZEN PREPARED
T = TRANSFORMATION　　T = TRANSFORMATION

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TABLE 5 CANNED FISH MARKET

1977

Fish Species Catégories de Poissons T	Inventory Rapport des Stocks 31-12-76 T	Net Weight Production Poids Net Production 1977 T	Imports Importations 1977 T	Available for Sale Disponible à la Vente T	Local Sales Ventes Marché Intérieur T	Export Sales Vente l'Exportation T	Total Sales Ventes Totales T	Inventory Stocks 31-12-77 T
Sardines Sardines	7,433	31,900	11,042	50,375	42,133	396	42,529	7,846
Tuna Tropical Thon Tropical	7,349	24,500	19,973	51,822	39,693	439	4,052	11,670
Tuna White Thon Blanc	1,576	8,200	---	9,776	6,233	343	6,576	3,200
Mackerel Maquereaux	3,526	28,400	1,019	32,945	27,311	919	28,230	4,715
Herring Harengs	300	700	2,529	3,529	3,173	26	3,119	330
Other Autres	900	5,000	24,934	30,834	29,118	1,006	30,124	710
TOTAL	21,084	98,700	59,497	179,281	147,661	3,149	150,810	28,471

tuna canning sector. Although demand has fully recovered from the 1975 crisis, fishing restrictions and pressures emanating from African coastal states tend to favour the development of their local canning industries.

(c) Distribution

Over the years, the French distribution chain grew with the addition of numerous middlemen until prices rose inordinately to the end user. The extreme links in the chain (i.e., the fish buyer or importer and the retailer or HR & I trade) expanded in terms of product range and services offered in an effort to contract the network.

Fresh domestic fish benefits from the shortest distribution route. The wholesale fishmonger or "mareyeur" buys from the fishermen or at auction, and the product is either delivered to regional wholesale markets such as Min Rungis in Paris or picked up by distributors and wholesalers for delivery to the retail restaurant trade. Normally, wholesalers at regional markets will obtain the product from the mareyeur and sell directly to fish retailers and restauranteurs from their stall at the wholesale market.

The "mareyeur" normally uses a 7-8.5% to a 10-15% margin and the operators of stalls at wholesale markets such as Rungis are permitted a government dictated 5-7% mark-up plus costs, although sometimes sales have been made at or below costs or as high as the market will bear (i.e. 15-20%). Transportation from port to Paris normally costs about 10¢ per kilogram.

Imported products, particularly frozen ones may be channelled via an agent, broker, importer, wholesaler refrigerated centre, secondary wholesaler and retailer. Conversely, with the trend towards fewer middlemen, products can be imported by a supermarket chain or on the latter's behalf by a central buying unit for direct sale to consumers. Mark-ups depend on market price and services rendered by the various levels. An agent's mark-up can range from 2% to 4%, an importer's from 5-7% to 15-20%, wholesalers 10-20% and retailers 15-35% depending on species, product form, product movement and product availability. All levels of distribution are obviously not used for all species. It is left to the exporter and initial contact in France to identify the necessary links required to minimize end prices.

In view of the importance of the Rungis market in Paris in the distribution of fisheries products, it deserves special mention. In 1978, 130 wholesalers operated in this market which catered to between 400 to 1,000 buyers per day. Rungis handled 114,683 tonnes of fish and fisheries products of which 30% was imported. During 1977, the same tonnage handled was valued at FF 860 million*.

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* Prices of selected items obtained on March 13, 1979 were as follows - live Canadian lobster FF 70-72/kg, French lobster FF 110/kg, pink and royal laugouste from Africa FF 90 and 120 kg. New England chum and coho FF 25 and 37/kg, greenland turbot FF 14.50-16.00/kg.

C. POTENTIAL

Among Canadian fisheries exports to France, cod is likely to be the leader in demand for the foreseeable future as French landings continue to decrease. Flat fish are also expected to retain their dominant position in the luxury bracket in France and imports are expected to increase as domestic landings are slowly reduced.

Herring imports will increase until the early 1980's providing prices are reasonable and consumption recovers. However, in the mid-1980's as stocks become accessible in appreciable quantities from the North Sea, imports are likely to be cutback, particularly in marinated products rather than smoked. The market for herring is thought to have fallen 25-40% due to high prices and there is uncertainty as to its recovery. A unanimous view was obtained, however, that prices above $0.60 per lb CIF would be detrimental to the market and would continue to spur sales of alternate products, i.e. other fish species and meat and vegetable preparations. Herring breeding stocks are thought to be recovering better than expected and producers are waiting until the North Sea gradually returns to meaningful production.

Canada is not likely to become a big mackerel supplier to France due to FIOM assistance to that industry, since it affects domestic as well as export markets. France will remain a consistent market for Canadian frozen salmon as hopefully the global market will expand to include the increasing production of farmed Baltic salmon. Pike shipments are not expected to rise much due to production limitations in Canada and spiralling prices.

The French market can absorb increased quantities of live refrigerated lobsters. Frozen lobsters in brine may increase dramatically in the short term but then level off reasonably rapidly. Several species are expected to be increasingly in demand in France and many of these should become obtainable in Canada: monkfish, skate wings, hake fillets, scallops, cod, flatfish, salt cod, dog fish, canned and frozen crab, and to a limited degree, sea urchins, and lumpfish roe.

D. IMPORT MARKET PROJECTIONS

In preparing the import market projections that follow below, numerous factors were considered:

- French share of EC quotas in Community waters and in foreign zones,
- changes within the price structure for fisheries products and in relation to potential alternative products,
- aggressiveness and numerical increase of third country suppliers,
- trends in consumption of the frozen foods sector and expansion of the cold chain,
- variations in the capacity of the French fleet to land species in demand,

- internal French Government policy in the area of fisheries,
- the renewal or removal of non-tariff barriers,
- promotional activity by the French trade,
- possible terms of the as yet undefined Common Fisheries Policy.

(i) Cod

With reduced landings from a 60,400 tonnes average for 1968-74, 20,000, 28,000 and 26,800 tonnes for 1975, 1976 and 1977 respectively, the trend towards increased imports will continue. Trade in all forms of cod remained relatively flat between 1976 and 1977 except for a rise in imports of frozen fillets by about 2,000 tonnes.

Net imports of dry salt cod increased 20% to 4,000 tonnes and wet salt cod rose 40% to 4,800 tonnes while domestic production has been gradually decreasing to under 2,000 tonnes in 1977. Potential exists in France for both products because of an influx of immigrants whose traditional eating habits include dry salt cod and also because of a diminishing domestic production, which is expected to cease entirely in the foreseeable future.

(ii) Haddock

Between 1976 and 1977, reduced landings of 1,800 tonnes were compensated for by increased imports of round and gutted fresh and frozen haddock. Also, there were reduced exports, mainly of round & gutted fresh and frozen, and frozen fillets. Gutted frozen haddock imports should continue to rise as landings decrease.

(iii) Redfish

Consumption will likely remain in the area of 3-4,000 tonnes annually and import requirements will depend on erratic domestic landings.

(iv) Turbot

Landings are not expected to vary considerably from the 600-700 tonnes level. However, with high prices for other prized flat fish (i.e., sole), turbot may benefit from stronger demand.

(v) Halibut

A marginal market exists for halibut in France, which has increased its net exports from 1976 to 1977.

(vi) Hake

Limited statistics only are available on hake, but the French trade is confident that quantities of frozen fillets in interleaf packs can find a receptive institutional market.

(vii) Flatfish

Most species are in demand, mainly on the fresh market. Prices are firm.

(viii) Herring

Statistics confirm the trade's comments that the market dropped about one-third between 1976 and 1977 despite increased imports of fresh and frozen herring of an estimated 8,000 tonnes. There will be a market for frozen flaps as well as round until the mid-1980's, providing prices return to an attractive level for consumers.

(ix) Mackerel

Domestic consumption rose by about 5,500 tonnes on the basis of increased landings of 2,000 tonnes and increased imports 5,000 tonnes with simultaneously larger exports over 1,000 tonnes. Landings, however, are expected to continue rising. Should herring and other species become affordable for the consumer, Canada should not expect to compete with the UK, Ireland, Spain and the Netherlands, now the major suppliers.

(x) Salmon

With no indigeneous production, France relies exclusively on equal imports from the USA and Canada for its smoking and fresh trade and on the UK, Ireland and Norway for its fresh trade. Increasing volumes of Norwegian salmon are being smoked and Norway with its aquaculture is seen as a major supplier to the smoking trade in the medium-to-long term.

The canned salmon market increased 33% in volume between 1976 and 1977, with the USSR dropping from its dominant position as supplier from 82% to 68% and Japan from 12% to 6%. Canada increased its share from 5% to 18%, but preliminary 1978 figures show a decrease in shipments of Canadian products.

(xi) Squid

Despite slightly increasing landings between 1976 and 1977, domestic consumption dropped due to lower imports and increased exports. The market appears stable, and with landings expected to increase, import market potential appears negative.

(xii) Lobsters

The live lobster market seems to be stable at slightly over 700 tonnes. The frozen lobster market began to expand in 1977 with a marked progression in 1978. Latest information indicates that lobster frozen in brine could benefit from lower sales of frozen langouste. The latter appears to have fallen into disfavour with consumers, although live langouste is maintaining sales levels. But the French market for frozen lobster is limited. Frozen lobster sales gains will probably be concentrated at the retail level. The HR & I trade still prefers to offer its lobster either "grillé" or "à l'américaine", and neither preparations can apparently be accomplished well with pre-cooked lobster, whether frozen or not.

(xiii) Crab

The canned crab market was fairly stable between

FRANCE

Table 6 IMPORT MARKET PROJECTIONS, 1981 AND 1985

(tonnes product weight)

	1977 Total	1977 from Canada	1981 Total	1981 from Canada	1985 Total	1985 from Canada
1. COD 1.0 Fresh	20380		22000		25000	
1.0 Frozen	1500		5000		7000	
1.1 Round-dressed	21880	326	27000		32000	
1.2 Fillets	10424	0	12000		15000	
1.3 Blocks						
1.4 Cured (Wet)	5005		6000		5005	
1.5 Canned						
1.6 Other (Dried	4500	0	5500		4500	
(Specify)DR-SLT-W.G.	146	0				
1.7 Roe						
1.8 Smoked	13	0	15		17	
2. HADDOCK						
2.1 Round-dressed	673	0	850		1000	
2.2 Fillets	991	0	850		700	
2.3 Blocks						
2.4 Cured						
2.6 Other						
3. REDFISH						
3.1 Round	29	0	-		-	
3.2 Fillets	249	0	-		-	
3.3 Blocks						
3.6 Other						
4. TURBOT						
4.1 Round-dressed						
4.2 Fillets						
4.3 Blocks						
4.6 Other						
5. HALIBUT						
5.1 Round-dressed	16	0	-		-	
5.2 Fillets			-		-	
5.3 Blocks						
5.6 Other	3	0	-		-	

	1977 Total	1977 from Canada	1981 Total	1981 from Canada	1985 Total	1985 from Canada
6. POLLOCK						
6.1 Round-dressed						
6.2 Fillets						
6.3 Blocks						
6.4 Cured						
6.6 Other						
6.7 Roe						
7. HAKE						
7.1 Round-dressed						
7.2 Fillets						
7.3 Blocks						
7.4 Cured						
7.6 Other						
8. FLATFISH						
8.1 Round-dressed	7270	0	7000		8000	
8.2 Fillets						
8.3 Blocks						
8.6 Other						
9. GRENADIER						
9.1 Round-dressed						
9.2 Fillets						
9.3 Blocks						
9.4 Cured						
9.5 Canned						
9.6 Other						
10. CAPELIN						
10.1 Round						
10.4 Cured						
10.5 Canned						
10.6 Other						
10.7 Roe						

	1977 Total	1977 from Canada	1981 Total	1981 from Canada	1985 Total	1985 from Canada
11. HERRING						
11.1 Round	13981	7331	14000		10000	–
11.2 Fillets						
11.21 Butterfly fillets						
11.3 Blocks						
11.4 Cured SALT-DR-	2570	116	2300		1500	
11.5 Canned W.C.						
11.6 Other Smoked	80	0	–		–	
11.7 Roe						
12. MACKEREL						
12.1 Round	21123	0	23000		17000	
12.2 Fillets	26	0	–		–	
12.4 Cured						
12.5 Canned						
12.6 Other						
13. SALMON						
13.1 Round	12065	4679	15000		18000	
13.2 Fillets/Steaks						
13.4 Cured						
13.5 Canned	3584		3800		4000	
13.6 Other Smoked	186	0				
13.7 Roe						
14. OTHER FINFISH						
14.0 Misc. Prods.	305	0	–		–	
14.1 Round-dressed	85857	251	110000		100000	
14.2 Fillets						
14.3 Blocks						
14.4 Cured						
14.5 Canned	51600					
14.6 Other DR-SLT-W.D.	4633	0	5000		4000	
Smoked	552	0				
Meal	8	0				
Misc. Prod.	83	0				
FRESHWATER FISH						
15. WHITEFISH						
15.1 Round	86					
15.2 Fillets						
15.3 Blocks						
15.6 Other						

	1977		1981		1985	
	Total	from Canada	Total	from Canada	Total	from Canada
16. PIKE						
16.1 Round	1485	920	1500		1500	
16.2 Fillets						
16.3 Blocks						
16.6 Other						
17. PICKEREL AND SAUGER						
17.1 Round						
17.2 Fillets						
17.3 Blocks						
17.6 Other						
18. LAKE PERCH						
18.1 Round						
18.2 Fillets						
18.3 Blocks						
18.6 Other						
19. LAKE SMELT						
19.1 Round						
19.2 Fillets						
19.3 Blocks						
19.6 Other						
20. OTHER FRESHWATER FISH						
20.1 Round	3623	30	3600		3600	
20.2 Fillets						
20.3 Blocks						
20.6 Other						
Smoked	38	0				
Total finfish (All forms) Fresh, refrig. frozen...	203216	13667				
Total finfish (All forms) Salted, wet cured dried, smoked	17817	116				
TOTAL	221033	13783				

	1977 Total	1977 from Canada	1981 Total	1981 from Canada	1985 Total	1985 from Canada
SHELLFISH						
21. SQUID						
Round	3249	0	3000		3000	
Tube						
Dried						
Other						
22. LOBSTER						
Live	689	162	700		700	
In shell	109	98	150		180	
Meat	15	0	-		-	
Canned						
23. CRABS						
In shell	1330	32	1500		1700	
Meat						
Canned	4053		4500		5000	
24. SCALLOPS						
Meats						
Meats with roe	7991	142	9000		10000	
25. SHRIMPS						
Raw - in shell	17336	0	20000		23000	
Cooked, peeled & deveined						
Canned	3312		5000		6000	
26. OTHER SHELLFISH						
In shell	52946	0	65000		75000	
Meat	1246					
Canned						
TOTAL SHELLFISH	84911	434				
TOTAL FINFISH	221033	13783				
27. TOTAL IMPORTS	305944	14217				

1976 and 1977 at about 4,000 tonnes. But, with the high canned lobster and king crab prices, Canadian crab has been reported increasing its market share. Frozen crabmeat is also experiencing increases. France is a net exporter of live/fresh crab or "tourteau".

(xiv) Scallops

The total market dropped slightly because of decreased landings and because rising imports, mainly of frozen scallops, did not compensate for the shortfall. There has been an increase in sales of frozen scallops, limited stocks without roe, for use in the catering and processing trade. Increasing prices at producer level and limited production do not appear to favour a big increase in Canadian exports of this product to France.

E. TRADE PRACTICES

Product Requirements

Product texture, colour and flavour should be consistent with each species being properly handled through the distribution chain (i.e., not bruised, well iced and not a source of offensive odour). The product is expected to be as close to "natural" as possible in terms of freshness, appearance and presentation.

The final form of the fish depends on whether it is being sold at the retail level or to institutions or restaurants. Canned fish are accepted in barrels,and frozen in strong cardboard master cartons. Retail packs vary in weight from 200 to 500 grams and occasionally, for less expensive items, 1000 grams. The most popular size packages are in the 200 to 400 gram range.

For the HR & I trade, frozen portions are widely used, however product requirements vary according to the type of establishment and the age and sex of customers. Hotel dining rooms and upper-category restaurants use a limited amount of frozen meats, fish and fowl. These outlets have qualified kitchen staff to prepare finished meals from fresh raw unprocessed products and to provide distinctive, higher-priced meals. Hotel coffee shops and medium-level restaurants require fresh portions (if available at reasonable prices) and greater quantities of frozen main course products. Public cafeterias and company restaurants - "restaurants d'enterprises" - which cater to company personnel and are subsidized by the firm - are geared exclusively to portions and operate on a cost-plus factor per portion. Even so, kitchen staff in these outlets still prefer to develop the "trimmings" such as sauces and gravies and therefore are not yet potential customers for fully-prepared meals. Depending on the mix of the firm's personnel, meals tend to range from pork, beef and lamb dishes for men to poultry, salads and fish for women. A male dominated firm will require larger portions of less-expensive species, whereas for women, smaller portions of finer species are preferred. Institutions such as boarding schools, children's homes, old people's homes and hospitals require easily-carved meats and easily-handled fish, i.e. deboned and without head or skin.

F. PROBLEMS

The major challenge for Canadian exporters interested in improving sales to France would appear to be the matching of their promotion efforts to the shifting forces of supply and demand in France. Doing so would appear to require a careful analysis of trends for specific fish and fish products, with particular attention to the preferences of the various segments of the market and to the appropriate pricing, packaging and handling.

In addition, the exporter will have to adjust to government currency and other regulations, unfamiliar trade practices and a complex system of distribution.

Though the French Government is striving towards the difficult goal of a balanced fisheries trade, transactions are relatively free of government-imposed restrictions such as quotas and licenses. However, it should be noted that in the past the French Government has used internal regulations which have indirectly dampened imports. An example has been retroactive price freezes at wholesale and retail levels. A regulation still in effect in the fisheries sector requires retail shops to offer consumers a fish fillet, a whole fish and a fish portion at government-set prices each week. These are identified with a (G) for "guaranteed price" on the attachment showing prices in the column entitled "fish shop" (see Appendix A).

Currency restrictions are most complex and the best sources of information for exporters are the six Canadian banks established in Paris, the Canadian Imperial Bank of Commerce, the Royal Bank of Canada, the Banque Canadienne Nationale, the Bank of Montreal, the Bank of Nova Scotia and the Banque Provinciale. The last three operate representation offices rather than full banking services.

Unless a history of satisfactory dealings has occurred between an exporter and buyer, it is recommended that an irrevocable letter of credit be requested, with sight or term drafts being less satisfactory arrangements. French firms often operate on tight cash positions and payment in 30, 60 and even 90 days will often be requested.

Bankers in France will normally assume that all operations not specified in regulations as permissible are not permitted, and most dealings are handled on the basis of exceptions for which derogations can or cannot be obtained. In some cases, a French importer cannot issue payment without proof that the product is en route to him. A French exporter cannot usually bill a customer abroad for future sales or cannot ship goods abroad unless proof of payment can be shown. The recommendation is, therefore, for exporters to avail themselves of bank advice prior to engaging in trading with new customers or in a new French market.

Health regulations as well as document requirements are numerous and often necessitate interpretation. Increasing use is being made in France of ABVT tests to measure the level of toxicity in certain products which may appear suspect. Exporters should consult French regulations addressing "Hygienic Conditions - Transportation of Perishables", "Hygienic Conditions pertaining to the Production, Conservation, Distribution and Sales of Prepared Dinners" and "Sanitary Regulations concerning Fisheries Products".

A new French tariff schedule effective January 1, 1979, has been introduced. It should be noted that the importer is responsible for all dealings and payments related to customs tariffs. The rates shown in customs schedules are for guidance only as levels can be suspended, increased or decreased without notice and at any time. Confirmation of tariff rates should always be obtained prior to computing prices with the foreign buyer relative to a specific sale.

APPENDICES

APPENDIX A

Appendix A contains representative prices for various fish species at the auction, wholesale and retail levels. They were collected in March 1979 from an auction at Boulogne-sur-mer, from the wholesale market at Min Rungis and from retail outlets (an open air market and a supermarket) in Paris.

FRESH-FROZEN-SMOKED/SALT/DRIED FISH PRICES PER KG - FRANCE MARCH 1979

PRICES IN FRENCH FRANCS

SPECIES FRENCH - ENGLISH	PRODUCT FORM	BOULOGNE S/M AUCTION 3/21/79	MIN. RUNGIS (LOW-HIGH-AV) 3/14/79	RETAIL PRICES SUPERMKT 3/24/79	RETAIL PRICES FISH SHOP 3/19/79	RETAIL PRICES MARKET 3/11/79
POISSONS-FINFISH						
Bars - Sea Bass	G		30.-50.-40.		69.80	
Barbues - Brill	R		20.-28.-24.			21.00
Import	R		18.-24.-22.			
Brome		3.90				
Cabillaud - Cod	G	8.30	9.-12.-10.			
Import	G		10.-14.-12.5			
Small	G	4.40				14.80
Piece/Slice	G			18.00	29.90	17.80
Filet-Fillet	F		12.-16.-15.		34.90	24.80-27.95
Import	F		12.-13.5-12.5			
Cardines - Megrim	R	4.99	10.-14.-12.5			
Chinchards - Horse Mackerel	R		2.5-3.5-3.0	7.80		
Chiens de mer - Dogfish	SK-G	7.85	15.-20.-17.			
Import	SK-G		15.-17.-16.			
Congres - Conger	G		6.-11.-9.	25.80	15.80(G)	
Dorades (Grises) -	R	3.30	6.-9.-7.		19.90-29.80	17.80
(de ligne) - (hook/Line)	R		10.-12.-11.			
Eglefin - Haddock	R	4.90				
Fletan - Halibut	R	0.50				
Grondins - Gurnard	R	7.50			11.80(G)	
(gris) - (grey)		2.80				
Hareng - Herring (spent)	R	4.30				
(female)	R	3.25				
Import	R		8.-9.-8.5			14.80
Lieus Jaunes - Pollak	R	7.20	7.-11.-10			
(Piece/Slice)	G			19.80	33.80	20.00
Lieus Noirs - Saithe	R	4.30	5.-6.-5.5			
Head-off/Etêtés	G			8.90		
(Piece/Slice)	G			12.80	19.80	11.00
Filet-Fillet	F				17.50(G)	
Limandes - Dab	R	6.00	4.-5.-4.5	8.25	11.80(G)	
Import	R		5.-7.-6.0	11.20		
Limandes Sole - Lemon Sole	R		12.-17.-15.		29.80	19.80-21.80
Import	R		12.-14.-13.			
Lingue - Ling	R	5.80				
(Julienne - Ling)	F		11.-14.-12.5	18.00		27.80

FRESH-FROZEN-SMOKED/SALT/DRIED FISH PRICES PER KG - FRANCE

PRICES IN FRENCH FRANCS

SPECIES FRENCH - ENGLISH	PRODUCT FORM	BOULOGNE S/M AUCTION 3/21/79	MIN. RUNGIS (LOW-HIGH-AV) 3/14/79	RETAIL PRICES SUPERMKT 3/24/79	RETAIL PRICES FISH SHOP 3/19/79	RETAIL PRICES MARKET 3/11/79
Lottes - Monk Fish (Tails)	SK		20.-26.-23.		39.80	39.80
Lottes - Monk Fish (Small)	R			29.90		
Import (Tails)	SK		20.-21.-20.5			
Maquereaux - Mackerel	R	2.15	1.5-3.5-3.	8.60	7.90(G)	8.80
Lisette - Mackerel (Small)	R			13.00		
Merlan - Whiting	R	2.00	4.5-6.5-5.5		(G)9.80-14.00	11.80
Merlan - Whiting	G	4.30	7.-9.-8.			
Merlan - Whiting	F				43.90	29.80
Merlus - Hake (Large)	G	16.50	20.-25.-23.	39.80		42.00
Merlus - Hake (Small)	R		16.-22.-20.	28.00		
Merlus - Hake (Very Small)	R		22.-25.-24.		39.90	
Merou - Grouper/Sea Perch	R					38.00
	pce/slice					
Mulet (blanc)-Mullet (white)	R		5.-7.-6.			9.80
	pce/slice					
Mulet (noir)-Mullet (black)	R		10.-12.-11.	16.50	27.80	
	pce/slice					
Plies (Carrelet) - Plaice	R	3.60	3.-4.-3.5	9.90	12.80	
Rouget Barbel - Striped mullet	R		18.-45.-23.	39.00		38.80
Rouget Gronoin-Red Gurnard	R		4.-8.-5.	9.90	11.80	
St. Pierre - John Dory	R		20.-35.-30.			
Sardines - Sardines (Import)	R		1.-3.-2.	9.50	9.80	8.80
Soles - Soles	R	28.00	23.-28.-25.	39.00-42.00		38.80
Filet-Fillets	F				59.90	
Import	R		24.-28.-26.			
Turbot (Large)	R		38.-40.-39		48.90	
Import (Large)	R		40.-46.-45.			
Import (Small)	R		22.-25.-24.			36.00
Tacauds - Pout	R	1.60				
Vive - Weever	R			13.20		

EAU DOUCE - FRESH WATER

SPECIES FRENCH - ENGLISH	PRODUCT FORM	BOULOGNE S/M AUCTION 3/21/79	MIN. RUNGIS (LOW-HIGH-AV) 3/14/79	RETAIL PRICES SUPERMKT 3/24/79	RETAIL PRICES FISH SHOP 3/19/79	RETAIL PRICES MARKET 3/11/79
Brochets - Pike (Import)	G		20.-25.-22.	35.00		
Carpes - Carp	R		10.-12.-11.			
Eperlans - Smelts (Import)	R		- 7.			
Sandres - Walleye/Sauger(Imp)	G		20.-49.048.			

FRESH-FROZEN-SMOKED/SALT/DRIED FISH PRICES PER KG - FRANCE

PRICES IN FRENCH FRANCS

SPECIES FRENCH - ENGLISH	PRODUCT FORM	BOULOGNE S/M AUCTION 3/21/79	MIN. RUNGIS (LOW-HIGH-AV) 3/14/79	RETAIL PRICES SUPERMKT 3/24/79	FISH SHOP 3/19/79	MARKET 3/11/79
Saumons-Salmon (Scotch farm)	R		47.-49.-48.			
Saumons-Salmon (Scotch wild)	R		60.-75.-68			
Saumons-Salmon (Norwegian)	R		30.-38.-25.			78.80(G)
Traites - Trout (Farm)	R		12.5-14.5-14.	18.50		22.00
Traites - Trout (pink flesh)	R		14.5-16.5-15.		39.90	
Traites - Trout (line)	L		14.5-15.0-14.8			
Traites - Trout (ocean)	R		20.-24.-22.		49.90	
AUTRES - OTHERS						
Amandes			2.5-3.5-3.			
Araignée-Spinous Spioek Crab	Live		12.-13.-12.5			
Bernicles-Barnacles			2.-2.5-2.2			
Bouquets	Cooked		30.-150.-100			
Clams - Clams			5.-7.-5.8			
Import			5.-7.-5.8			
Coques - Cockles			2.6-3.-2.7			
Crevettes - Shrimp (Grey)			-50.			
Import (Grey)			29.-32.-30.			25.00
Import (grated)			-40.			
Import (grey)	Shelled		55.-65.-60.			
Encornets/Calmar-Squid(small)	Wh		20.-24.-22.	15.00		
C.St. Jacques-Scollops	In		11.-14.-12.	13.00	29.80	11.80
(W/rol)	Shell					
	Shucked		45.-55.-52.			
Import			45.-55.-52			
Ecrevisses-Crayfish-Import	Live		19.-22.-21.	36.00		
Escargots - Snails	Live		-18.	13.20-11:00	per doz	to small
				7:50	large	
Escargots(Mer) - Sea Snails			3.5-4.5-4.			
Grenouilles - Frogs	Live		15.-25.-20.			
Homards - Lobster	Live		110.-140.-130.	205.00		
Import	Live		80.-120.-110.			
Import	Dead		35.-40.-38.			
Langoustes - Crawfish(Red)	Live		90.-130.-110.	230.00		
Langoustes - Crawfish(Pink)	Live		100.-120.-110.			
Langoustines-Norway Lobster						
(Med)			32.-25.-34.	53.00		48.80
(Lge)			39.-43.-40.			

FRESH-FROZEN-SMOKED/SALT/DRIED FISH PRICES PER KG - FRANCE

PRICES IN FRENCH FRANCS

SPECIES FRENCH - ENGLISH	PRODUCT FORM	BOULOGNE S/M AUCTION 3/21/79	MIN. RUNGIS (LOW-HIGH-AV) 3/14/79	RETAIL PRICES SUPERMKT 3/24/79	FISH SHOP 3/19/79	MARKET 3/11/79
Moules - Mussels			4.-45.-4.3			
Import (Spain)			5.2-5.5-5.4			
Import (Holland)			1.8-2.2-2.			
Palourde - Carpet Shell			32.-38.-36.			
Praires - Hard/Round Clam			5.-8.-7.			
Rails (ailes)-Skate (Wings)	SK	12.30	10.-18.-15.	28.00		28.00
Seiches/Poulpes-Cuttlefish/ Octopus	Pce		6.-9.-7.	18.40		17.00
Blancs de Seiches			26.-27.-26.5	38.00		
Tourteaux - Crab	Live		16.-19.-18.			
Tourteaux - Crab (Small)			-15.			
Vigneaux			7.5-8.5-8.			
Import			7.5-8.-7.7			
Vernis			4.-4.5-4.3			
FROZEN						
Baudroies - Angler/Monkfish	F		14.-18.-16.			
Chien - Dogfish (Import)			8.-9.5-8.5			
Crevettes (Roses) Shrimps (Pink)	Shelled		22.-30.-28.	34.00		
Crevettes (Roses) Shrimps (Pink)	With Shell			54.00	30.90-40.00	40.00
C.St. Jacques - Scallops	Shucked		42.-44.-43.			
Import	Shucked		40.-44.-43.			
Langoustes-Crawfish (Green tail)	Raw		80.-85.-82.			
Langoustes-Crawfish "	Cooked		50.-55.-52.			
Sardines - Sardines			3.8-4.5-4.			
Saumon - Salmon			25.-35.-29.			
SMOKED - SALT - DRIED						
Anguilles - Eels	R		33.-37.-35.			
Buckling - Buckling (Hareng/ Herring)	R		11.5-13.5-12.5			
Filets Salés-Salt Fillets	F		10.-11.5-10.5			
Filets Div. Fumes-Butterfly Smoked	F		16.-22.-18.5			

FRESH-FROZEN-SMOKED/SALT/DRIED FISH PRICES PER KG - FRANCE

PRICES IN FRENCH FRANCS

SPECIES FRENCH - ENGLISH	PRODUCT FORM	BOULOGNE S/M AUCTION 3/21/79	MIN. RUNGIS (LOW-HIGH-AV) 3/14/79	RETAIL PRICES SUPERMKT 3/24/79	FISH SHOP 3/19/79	MARKET 3/11/79
Haddock - Haddock	R-Sm		19.-24.-22.			40.00
Import	G		19.-24.-22.	36.00		
Filets-Fillets	F		19.-24.-22.			
Harengs Salés-Salt Herring	R		8.5-11.-9.5			
Harengs Saur -	R		14.-15.-14.5			
Filets-Fillets	S		19.-24.-22.			
Kippers - Kippers	F		18.-20.-19.			
Oeufs de Poissons-Fish Eggs (Import)	Sm		38.-43.-40.			
Morue Salée - Salt Cod	G		13.5-15.-14.5	20.90 (strips)		
Filets-Fillets(Complete)	F		19.5-22.0-21.0	23.00		
Filets-Fillets-400 gr box	F		8.5-9.5-8.8			
Séchée-Dried	F		11.5-19.-16.5			18.00-21.00
Sardines - Sardines (Import)	Salt		7.5-9.5-8.	18.00		
Saumon - Salmon (Norway)	R-Salt-Sm		120.-133.-131.			
Saumon - Salmon (Canada)	G-Salt-Sm		80.-88.-84.			
Saumon - Salmon (Denmark)	R-Salt-Sm		120.-125.-124.			
Bandes-Sides (Norway)	Sl-Recons		110.-130.-120.			
(Canada)	Sl-Recons		70.-90.-80.			
(Denmark)	Sl-Recons		110.-130.-120.			
Sprats - Sprats	Sm		9.-10.-9.5			
Import	Sm		9.-10.-9.5			
Truites - Trout	G-Sm		30.-33.-31.			

APPENDIX B

Appendix B contains retail prices for processed fish and fish products. They were collected from a suburban SUMA supermarket in Paris on March 24, 1979.

CANNED FISH AND FISH PRODUCTS SOLD IN SUPERMARKETS-FRANCE

General Foodstuff 10 feet x 5 shelves

PRODUCT	BRAND	PRODUCER	IMPORTER/ DISTRIBUTOR/ (Origin)	STYLE/ INGREDIENTS	WEIGHT VOLUME GR	PRICES FF
Moules - Mussels	Kilda	Marina-Denmark	I-Snair/Socemas	"Au naturel"	415/250	4.90
Saumon - Salmon (Fancy)	Socra	Prodintorg - USSR	Petrossian	Pink	185	6.20
Crabe N. Alaska - Crab	Pacific Pearl	Pacific Pearl	(Kodiak Alaska)	Fancy Queen -leg 25-35%	184	20.90
Crabe - Crab	Kilda	Panasia Food Co. Bangkok	I. Snair-Socemas	Leg 25%-Body 75%	170/142	6.95
Crevettes - Shrimp	Sea Echo	Esin Canning Industry	(Malaysia)		198/127	6.95
Homard - Lobster	Beaver	J.W. Windsor	Canada		170/142	27.90
Crevettes - Shrimp	New Orleans	Deep South Packing Co.	USA		-/120	6.95
Thon Blanc - Tuna (White)	Saupiquet	Saupiquet (France)	(Senegal)	"Au naturel"	154	8.50
Thon Blanc - Tuna (White)	Saupiquet	Saupiquet (France)	(Senegal)	"Au naturel"	310	10.60
Thon - Tuna	La Doelanaise				154	5.45
Thon - Tuna	" "				310	10.30
Filet de Colin - Saithe	Captain	Pecherie de la Morinie	B/S/M France		187	4.20
" " "	"	"	"		140	3.55
Thon Tomate - Tuna	Squpiquet	Saupiquet	(Senegal)	Tomato Sauce	212CM3	6.05
Thon Blanc - Tuna (White)	Captain Cook	La Doelanaise (Fr)	(")		83	4.35
Saury (Balgou)	Socra	Prodintorg (USSR)	I. Petrossian		250	3.45
Sardines - Sardines	Chancerelle	Soluco (Fr)		in oil & elmon	115	2.77
Sardines - Sardines	Saupiquet				60	2.80
C. St. Jacques - Scallops	Arok	F. Goularouen	(Douarnenez Fr)	with shells(Meat)	78	10.55
Sardines A L'Huile	Cercle Rouge	Imperconseries	(Portugal)		95	1.70
Foie de Morue Fumés	Captain Cook	La Doelanaise (Fr)	(France)		121	3.55

+35 other types of sardines of 115-350 gr priced at FF 1.50 to 6.0
+12 other types of tuna priced at FF 2.0 to 9.0
+18 types of mackerel fillets of 85-315 gr priced at FF 2.0 to 7.0

FROZEN FISH AND FISH PRODUCTS SOLD IN SUPERMARKETS-FRANCE

FROZEN FOOD COUNTERS - 20 feet x 4 shelves

PRODUITS	PRODUCT	MARQUE/ BRAND	SPECIFICATIONS - INGREDIENTS PRODUCT SPECS - INGREDIENTS	WEIGHT VOLUME	PRICES/PRIX FF	Cdn$
				Grams		
Filets de Merlan	Whiting Fillets	Vivagel	1QF 6 to 8 fillets	1000	23.80	
Filets de Marlan	Whiting Fillets	Vivagel	1QF 2 to 3 fillets	400	10.30	
Fillets de Limande	DAB Fillets	"		300	12.50	
Filets de Sole	Sole Fillets	"		300	17.50	
Filets de Cabillaud	Cod Fillets	Findus		400	14.25	
Filets de Colin	Saithe Fillets	"	(lieu noir)	400	10.50	
Cabillaud	Cod Fillets	"	4 tranches/slices	400	14.25	
"	Cod Fillets	"	2 tranches/slices	200	7.10	
Crêpes-F. de mer & Poisson	Seafood & Fish crepes	Vivagel		200	5.10	
Crêpes-Poisson & Crevettes	Fish & Shrimp	Findus	4 Crepes	200	5.50	
Marlans Vidés-étêtés	Whiting-gutted head-off	Vivagel		400	6.50	
Crevettes Roses	Pink Shrimps	Findus	Crites/cooked	250	10.80	
Moules Décoquilliées	Mussels Shacked	Vivagel		200	5.80	
Chair de crabe	Crab meat	"		200	25.50	
C. St. Jacques	Scallops	Findus		225	20.90	
2 coquilles	2 shells	"	Poisson-Crevettes/fish-shrimps	200	10.40	
C. St. Jacques-Coquilles	Scallops in shell	Scandus	Avec corail/with Rof.(Scotland)	500	31.50	
Gratin De Poisson	Gratin of fish	Findus	60% Poisson/Fish	450	10.35	
Brandade Parmentier	Prepared Dinner	Vivagel	Cabillaud - Cod	500	11.90	
Croquettes de Poisson (20)	Fish Croquettes (20)	"	62% Poisson/Fish, Farine Deble/Wheat Flour, pommes de terre/potato granules, huile d'olive/olive oil, lait eu poudre/ milk powder, sel/salt, epices/spices, ail/garlic, persil/parsley.	1000	15.00	
Croques Poisson (14)	Fish croquettes (14)	Iglo	Chapelure/Breaded (W. Germany)	460	11.90	
Croques Poisson (8)	Fish Croquettes (8)	Iglo	Chapelure/breaded (W. Germany)	255	9.40	
Croquettes-Cabillaud (6)	Cod Croquettes (6)	Vivagel	62% Cabillaud/Cod, farine/flour, riz/rice.	300	6.65	
Truite Saumonée	Trout (Pink Fresh)	Scandus	500-600 gr packages/empaquetages	1000	39.00	
Colin (lieu noir)	Saithe	Findus	Trances Panees/breaded sticks, 72% lieu noir/saithe fillets, chapelurel/b. crumbs, farine/flour, sel/salt, lait/milk.	200	5.55	
Cabillaud	Cod	Findus	Same as above	200	6.95	
Eglefin	Haddock	"	Same as above	200	6.95	
Merlu (Colin blanc)	Hake	Vivagel	Same as above	200	8.60	

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FROZEN FISH AND FISH PRODUCTS SOLD IN SUPERMARKETS-FRANCE

FROZEN FOOD COUNTERS - 20 x 4 shelves

PRODUITS	PRODUCTS	MARQUE/ BRAND	SPECIFICATION - INGREDIENTS PRODUCT SPECS. - INGREDIENTS	WEIGHT POIDS	PRICES/PRIX FF	CDN$
Cabillaud - Pane (20)	Cod - Breaded (2)	Vivagel	20 tranches/slices, frozen ATSGA, frine/flour, Amidon/starch, sel/salt, epices/spices	1000	24.50	
Poisson Sauce Mornay	Fish Dinner "Sauce Mornay"	Iglo	68% merlu/hake, fromage emmental/ cheese, champignon/mushrooms, lait/ milk, huile vegetale/veg. oil, epices/ spices	400	12.40	
Paella	Paella	Findus	Veg/Veg., poivrons/peppers, tomates/ tomatoes, oignons/onions, ail/garlic riz/rice, poulet/chicken/seiche/ cuttle fish, cabillaud/cod, crevettes/ shrimps, huile/oil, sel/salt, epices/ spices	650	18.80	
Poisson À La Livornaise	Fish dinner "A La Livornaise	Vivagel	55% lieu noir/saithe, tomates/tomatoes, oignons/onions, huile/oil, concer-tre de tomate/tomato paste, celeri/ celery, farine/flour, sel/salt, sucre/ sugar, persil/parsley, basil.	450	12.30	
Poisson À La Parisienne	Fish Dinner "A La Parisienne	Fundus	66% cabillaud/cod, champignons/ mushrooms, tomates/tomatoes, lugumes/ vegetables, vin/wine, lemon juice/ jus de citron, epices/spices.	450	14.30	
Poisson À La Bordelaise	Fish Dinner "A La Bordelaise	Findus	75% cabillaud/cod plus sauce	400	14.60	
Bâtonnets De Cabillaud	Fish sticks - Cod	Findus		300	9.30	
Colin (Lieu noir)	Saithe	Findus	8 tranches/slices	400	10.65	
Eglefin	Haddock	"	" "	400	13.95	
Cabillaud	Cod	"	" "	400	12.20	

Vivagel: Compagnie du froid alimentaire
Paris 9. France

Fundus: Glaces Findus S.A.
19 Cite Voltaire
Paris 11. France

Scandus: Scandiport, France

Iglo:

PROCESSED FISH AND FISH PRODUCTS SOLD IN SUPERMARKETS-FRANCE

LUXURY PRODUCTS COUNTER (10 feet x 4 shelves)

PRODUCT	BRAND	PRODUCER	IMPORTER/ DISTRIBUTOR (Origin)	INGREDIENTS	WEIGHT VOLUME	PRICES/Kg FF	CDN $
Smoked Salmon	Arête D'argent	Saumon Pierre	(Norway)	Pre sliced-Recons	400-500 gr	118.00	
		Chevance	(Cdn-Troll Silver)	Tituted-Vac Pack	1100 gr	110.00	
		Poullaouen, France	"		700 gr	112.00	
Smoked Salmon	" "	" "	(Canadian)	2-10 slice packages	80 gr	215.00	
" "	" "	" "		"	250 gr	135.00	
Smoked Trout	Chevance	" "	(Smoker's Own)	1 trout-vac pack	110-150 gr	46.70	
Smoked Cod Roe	"	" "	(Iceland)	Pieces-vac pack	100-200 gr	70.00	
Smoked Eel	"	" "	(Australia)	" " "	100-175 gr	80.00	
Salt Cod Fillet	Nord Fillet	Nord Morue-France	(France)	Fillet-vac pack	400 gr	11.20	
Herring Fillet	-	Pecherie Marenne & Seve	(B/S/M-France)	"Au Naturel"-vac pack	200 gr	6.65	
Herring Fillet	-	" " "	" "	"Dried-Smoked" V.P.	200 gr	6.65	
" "	J.P. Delpierre	J.P.D. Delpierre	(B/S/M France)	Smoked-V.P.	500 gr	17.00	
" "	"	"	"	A L'Huile Aro matisee	200 gr	8.10	
" "	-	Pecherie Maronne	(B/S/M France)	" "	125 gr	4.45	
Kippers	King Kippers	" "	" "		200 gr	6.55	
Herring Fillets	Marina	Marina Danish Seafoods	(Denmark)	Tomato Sauce-Jar	200 gr	6.40	
Pink Shrimp (Small)	Sunnan	-	(Denmark)	Shelled-Plastic Tub	250/150 gr	18.90	
Herring Fillets	J.P. Delpierre	J.P. Delpierre	(B/S/M -France)	In oil-smoked-Jar	140 gr	7.25	
" "	"	"	" "	" " "	340 gr	13.90	
Marinated Herring	J.P. Delpierre	"	" "	Vin.salt sugar-Jar	250 gr	10.60	
Rollmops	"	"	" "	"A la remoulade"	250 gr	11.70	
"	"	"	" "	"	400 gr	16.80	
Lumpfish Eggs	Royal	Limfjordsosters	(Denmark)	"	50 gr	4.50	
" "	"	"	"	"	100 gr	7.75	
" "	"	"	"	"	250 gr	17.50	
Mussels	Marina	Danish Seafoods	(Denmark)	"Au Naturel" - Jar	340/200 gr	7.00	
"	"	"	"	"A la Catalane"	340/200 gr	7.25	
Marinated Mussels	Royal	Limfjordsosters	(Denmark)	Vinegar-Bay-Peppers	100 gr	4.85	
" "	"	"	"	Vinegar - Jar	200 gr	6.85	
Kronsilo (Small herring)	Marina	Danish Seafoods	"	Vinegar,Dextrose-Onion	200 gr	7.00	
Crayfish Paste (Butter)	Neptuna	-	-	Approx 25% of product	90 gr	4.25	
Shrimp " "	"	-	-	named as raw material	90 gr	to	
Lobster " "				with filler incl.	90 gr	4.75	
Norway Lobster Paste (B)	"			Saithe, butter,milk	90 gr		
Smoked Salmon Paste (B)	"			potatoe granules,	90 gr		
Anchovy Paste (Butter)	"			spices	90 gr		
Crab Paste (Butter)	"				90 gr		

PROCESSED FISH AND FISH PRODUCTS SOLD IN SUPERMARKETS-FRANCE

LUXURY PRODUCTS COUNTER (10 feet x 4 shelves)

PRODUCT	BRAND	PRODUCER	IMPORTER/ DISTRIBUTOR	INGREDIENTS	WEIGHT VOLUME	PRICES/Kg FF	CDN $
Anchovy Fillets	Andre Falcone	Conserve Et Saldison	(France)	"Sauce Piquante" - Can	47 gr	3.45	
" "	" "	De Sare Sarl - Ascain	"	"Allonges A L'Huile	47 gr	2.90	
Anchovy Fillets	" "	"	"	"A L'Huile D'olive	47 gr	3.30	
+ 3 other types	Confizionato	La Monegasque	Monaco	-	-	-	
Anchovies	Andre Falcone	13700 Meriguane	France	"Vinaigre Moyen" - Jar	13 cl	3.40	
"	"	"	"	"Ser Moyen"	13 cl	3.10	
"	"	Conserve de Sare Sarl	Ascain-France	"A L'Huile"	140/105 gr	3.10	
Anchovy Fillets	"	" "	" "	"Roulés au Capres"	180/150 gr	11.00	
" "	"	La Monegasque	Monaco	"A L'Huile" Sealed Jar	450 gr	29.30	
" "	"	"	"	" "	235 gr	14.75	
Anchovy Paste (Creme)	La Monegrasque	"	"	Tube in box	100 gr	2.95	