ANNEX TO THE WORLDWIDE FISHERIES MARKETING STUDY: PROSPECTS TO 1985

GREECE

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(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

GREECE [V.5]

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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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Department of Fisheries and Oceans

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GREECE

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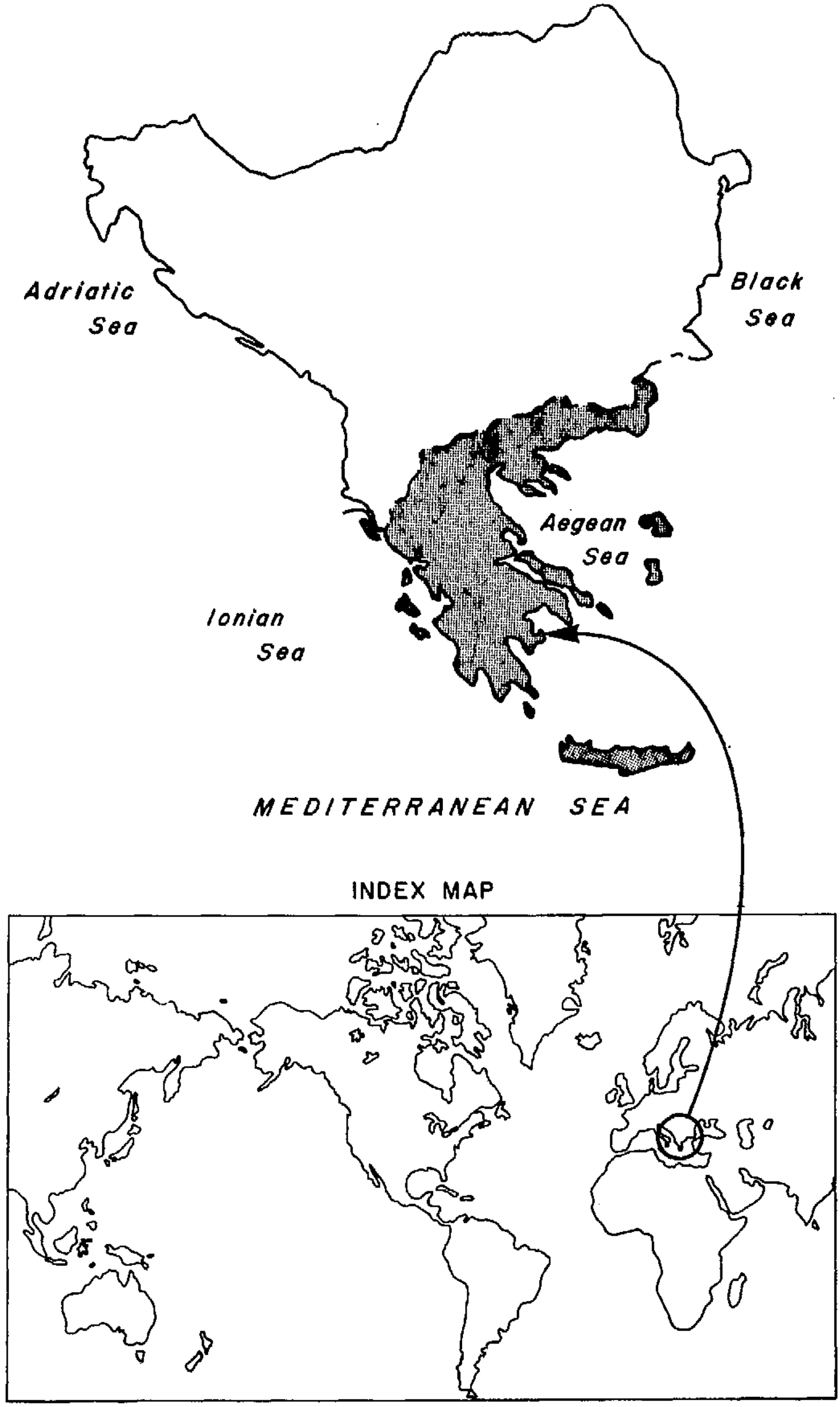
Adriatic Sea
Black Sea
Aegean Sea
Ionian Sea
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A. DEMAND FOR FISH

Greece is a small maritime nation with a sizeable fishing fleet. Catches have fluctuated between 95 and 110 thousand tonnes in recent years (valued at $154 million in 1977). With a population of nine million plus, Greece still needs to import considerable quantities of fish products to supplement declining domestic production and cater to traditional as well as new and expanding consumer tastes. The growing importance of tourism has also added pressure for increased fish supplies.

Per capita fish consumption by Greeks of 10.6 kilos product weight in 1976 approximated the figures for 1975, but was below the 1974 figure of 12.6 kilos. Of the total consumption in 1976, fresh fish constituted 7.87 kilos and frozen 2.8 kilos. For 1975 the breakdown was: fresh 7 kilos and frozen 2.6 kilos. The preference for fresh fish is clearly evident. Despite restrictions, controls, high operating costs and other pressures on the Greek fishing industry and trade, overall fish consumption has not varied dramatically in recent years.

Per capita consumption of fish in this market is, and will continue to be, influenced by many variables including domestic landings, allowable imports, price, quality, substitute protein costs and desirability. Therefore, future consumption is difficult to project with any significant degree of certainty.

Projections for 1981 and 1985 have been based on an increase in per capita consumption of .5 kilos per year as a result of:

- Increased government promotion of fish as a desirable protein food;
- The relative cost of red meat;
- Some increase in domestic landings resulting from successful negotiation of bilateral agreements with other countries;
- Increased access for imported fish due to EC accession

B. <u>SUPPLY OF FISH</u>

(a) <u>Domestic Sources</u>

The Greek fishing industry is facing constraints and consequently fish production has declined in recent years. These difficulties include:

- reduction in the extent of fishing grounds owing to the new regime of the seas;
- jurisdiction disputes with neighbouring countries resulting in Greece retaining its coastal limits at only 6 miles;
- overfishing;
- increasing pollution of the Mediterranean;

GREECE:

Table 1 DOMESTIC FISH CONSUMPTION:
1976, 1977, 1981 and 1985

	1976	1977	1981	1985
1. Per capita consumption (edible or product weight in kg)	10.6	11.5	13.0	15.0
2. Population (in millions)	9.1	9.2	9.6	10.1
3. Domestic market (line 1 x line 2 in thousand tonnes)	96.4	105.8	124.8	151.5
4. Percentage increase (or decrease)		+10	+18	+21

Population projections for 1981 and 1985 are based on the average increase of 1.12% which occurred over the three years 1975, 1976 and 1977.

Major types of seafood consumed in Greece are listed in Appendix A.

- lack of modern production units;
- lack of manpower;
- inadequate utilization of mass production species;
- high labour and production costs;
- government price controls.

To assist the fishing industry, the Greek government is:

- renewing and modernizing the fishing fleet, though no increase in size or number of units is planned;
- studying the serious problem of lack of manpower for crewing;
- reducing the costs of production and fisheries development. Subsidies are granted for fuel, modernization of equipment, sponge production, insurance premiums, production of species used by the processing industry and for exports of trout and sardines;
- regulating maximum selling, producer and wholesaler prices.

It is possible that Greek fish production will increase in coming years from successful negotiation of bilateral agreements with other countries, and through granting of fishing rights in the territorial waters of third countries having fishing quota agreements with the European Economic Community, of which Greece has recently become a member.

However, despite these possible developments, the shortfall between domestic landings and domestic consumption is expected to persist in the future.

Information published in 1977 by ALIELA,a Greek fishing monthly magazine,gives the following indications:

- The Greek Atlantic trawler fleet operates in or outside territorial waters off the Northwest African coast (Mauretania, Conakry-Guinea, Guinea-Bissau, Sierra Leone) and the Southwest Atlantic coast (mainly territorial waters of Argentina).
- These fleets harvest: cuttlefish, red sea bream, red mullets, groupers, soles, gurnets, dogfish, squid, octopus, horse mackerel, hake and shrimp.
- All catches in these regions are deep frozen whole, ungutted, by fishery factory ships operating near the fishing grounds.

The projections in Table 3 assume*:

- Government resource management policy to ensure no further stock depetions within the six mile Greek territorial limit;

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* The statistics in Table 3 do not agree with those supplied to the Canadian Embassy, Athens by ALIELA. Anomalies in Greek statistics are historical and these figures must be approached with caution.

Table 2 VOLUME OF CATCH BY THE GREEK FISHING FLEET

	1974	1975	1976	1977
		(in tonnes)		
Atlantic fishing (frozen)	28,900	23,900	22,690	25,786
Distant water (shrimp fishing)	in above	2,500	2,200	2,000
Mediterranean fishing (trawlers)	6,000	3,600	3,000	1,200
Open or mid-water fishing,	54,000	46,000		
- trawlers			20,000	22,000
- purse seiners			22,000	25,000
Coastal or offshore fishing	16,000	12,000	16,000	17,500
Inland waters (lake and lagoon)	5,000	6,500	9,000	10,000
TOTALS	109,900	94,500	94,890	103,486

Source: ALIEIA

Table 3 Landings By Specie, 1976, 1977, 1981 and 1985
(Quantity in metric tons, round weight)

	1976	1977	1981	1985
1. Hake, couch's whiting	7,523.3	6,876.7 (-646.6)	7,000	7,000
2. Anchovy	9,281.4	7,343.1 (-1938.4)	4,000	2,000
3. Sole	2,531.1	1.999.3 (-531.8)	2,000	2,000
4. Bogue, salemia	6,494.8	6,109.7 (-385.1)	6,100	6,100
5. Common grey mullet	1,527.9	1,879.3 (+351.4)	2,000	2,000
6. Chub mackerel	1,910.6	1,924.6 (+14.0)	2,000	2,000
7. Red bream	3,601.3	4,373.0 (+771.7)	4,500	4,500
8. Pickerel, blotched pickerel	8,619.0	9,427.6 (+808.6)	12,600	15,800
9. Red mullet, striped mullet	3,720.2	3,583.8 (-136.4)	3,600	3,600
10. Bonito	511.7	549.8 (+38.1)	550	550
11. Pilchard	12,674.4	12,161.3 (-513.1)	10,000	8,000
12. Horse mackerel	7,214.2	7,156.4 (-57.8)	7,200	7,200
13. Scorpion fish, tub fish, gurnard, flying fish	1,582.5	1,281.6 (-300.9)	1,300	1,300
14. Black sea bream	299.2	271.6 (-27.6)	300	300
15. Dog's teeth, porgy, common sea bream	3,300.4	3,996.0 (+695.6)	4,000	4,000
16. Dusky sea perch, grouper, stone bass, badeche	1,442.6	1,631.1 (+188.5)	2,000	2,000
17. Other fish	16,055.1	16,929.8 (+874.7)	20,425	23,925
18. Common squid	710.3	519.9 (-190.4)	500	500
19. Flying squid	454.3	215.3 (-239.0)	250	250
20. Cuttle fish	2,851.6	3,053.7 (+202.1)	3,000	3,000
21. Octopus (poulp)	947.0	861.7 (-85.3)	900	900
22. Shrimp	2,203.4	2,665.8 (+462.4)	2,700	2,700
23. Other crustaceans	673.9	834.8 (+160.9)	1,400	2,000
24. Warty venus, noah's ark, mussel, oyster	1,090.2	1,614.1 (+523.9)	3,600	5,600
	97,220.4	97,260.0 (+39.6)	101,925.0 (+4,665.0)	107,225.0 (+5,300.0)

Source: Greek Statistical Service

- The Greek Atlantic trawler fleet retains access to territorial waters off Northwest Africa and the Southwest Atlantic coasts, with annual volumes similar to 1977;
- Continued decreases in catch from the over-fished, polluted Mediterranean;
- Coastal and inland fisheries continue to provide increasing volumes of fish;
- Aquaculture (fish farming) will play an increasing role in providing domestic fish supplies. Increases will be similar to those between 1976 and 1977.

(b) Imports

Imports during 1976 accounted for approximately 15% of Greece's total domestic fish requirements, and in 1977 rose to approximately 17%. Slightly increasing import demand is anticipated in future.

Imports in recent years have fluctuated between 21,000 and 24,000 tonnes. Main imports in 1977 were: wet salted codfish, frozen cuttlefish and squid, canned or processed mackerel and bonito, smoked herring, miscellaneous frozen saltwater fish, prepared molluscs, frozen mackerel, fish roe and processed tuna.

Canada's share of this market has been small.

Total sales in 1977 were valued at $281,234 and consisted of modest quantities of Newfoundland wet salted codfish; canned salmon; fresh frozen salmon; cured salmon roe and smoked salmon. Our 1978 sales dropped to $223,281, comprising small shipments of wet salted codfish; canned salmon and crab and cured salmon roe.

Canada has been relatively unsuccessful in introducing other fish species to the Greek market primarily because of higher Canadian prices, but also due to Greek consumer preference for traditional species, cures, sizes and packs.

Canada's long and medium term prospects for increased trade with Greece will be influenced by Greek membership in the EC. Greece's association status provided for reciprocal preferential tariff treatment in each other's markets. Full membership will give European suppliers an even greater edge in the Greek market. Nevertheless, an anticipated acceleration in the pace of Greek economic development consequent on EC entry should present opportunities for Canadian exporters. These will be best exploited if we are prepared to process fish products according to Greek consumer preference and offer products at competitive prices.

(i) Cod

Wet salted cod is the most important single Greek seafood import. At present, annual consumption is approximately 8,000 tonnes. The market is dominated by Iceland and the Faroe Islands with smaller quantities coming from Norway and the U.S.S.R. Demand for frozen fillets is insignificant.

(i.1) The Greek Army usually calls for tenders on a international basis once or twice a year for 700-1,000 tonnes of frozen cod. Apart from the low prices usually paid for such business, the tender terms have so far stipulated that the cod must be frozen at sea. At present, the Canadian fleet does not freeze cod at sea. When freezer factory ships are added to the Canadian fleet, the potential for sales for this nature to Greece should be investigated.

(i.2) Cured. There is renewed interest in wet salted cod after a lapse of some years by both the CSFC and Greek importers. During 1976, transactions amounted to $63,000, rising to $107,000 in 1977, and $100,054 in 1978. It is unlikely that 1979 sales will exceed those of 1978. Canadian wet salt cod is considered to be poorly graded and undesirable in colour.

(i.3) Roe. There is continuing demand from Greek importers for cod roe, both sugar-salted and salt cured.

(ii) Salmon

The complete lack of trade in Canadian fresh, frozen and smoked salmon during 1975 and 1976 could be attributed to tight supply and high prices. Modest trade resumed during 1977. Though Statistics Canada shows no exports to Greece in 1978, one Greek importer claims to have imported 7 tonnes frozen, 5 tonnes smoked and 400 kilos salmon roe for its ship handling trade.

(ii.1) Canned. Shipments of pink, chum, and other varieties of canned salmon have increased in recent years, rising from $73,000 in 1976 to $131,000 in 1977 but dropping again in 1978 to $79,868. This trade could be regular, but fluctuates in volume/value in response to market demand and prevailing relative price levels.

Canada's competitors for the market in this product are Japan and the U.S. With Japan's supply situation adversely affected by extended fisheries jurisdiction, a potential exists for growth in Canadian canned salmon shipments in this market.

(ii.2) Roe. There is a continued market demand for cured salmon roe.

(iii) Herring

There are interesting prospects if Greek product requirements can be met. Greece is a traditional importer of cured herring known as "Golden" or "Double Golden", imported whole, ungutted, in wooden cases. The price was indicated to be $17 U.S. per 7 kg. case C.I.F., Piraeus in early 1979. Annual import requirements vary between 1,700 and 2,100 tonnes. There is no demand for Canadian bloaters or kippers and only very limited interest in boneless herring fillets, mackerel and groundfish.

(iii.1) Cured. After much effort by all interested parties it now appears possible that at least one Canadian exporter can offer the Dutch smoked cure which is popular in Greece. An initial order was placed by a leading Greek importer, however, consumer reaction has been that the Canadian product is of inferior quality. Further product development can overcome this initial setback.

(iv) Mackerel

There is limited interest in frozen mackerel. Japan exports considerable quantities of canned mackerel to Greece. Price is indicated to be $18 U.S. for 48 x 15 oz. C.I.F. Piraeus, during early 1979.

(v) Squid

According to the trade in Greece, the country annually imports between 4,000 and 5,000 tonnes comprised of the following species:

- Lologo Pealei (Boston)
- Lologo Opalescens (California) - of which approximately 1,000 tonnes is imported annually
- Formosa
- Lologo Vulgaris - none has been imported since 1972 due to high price quoted which exceeded the price control limits set by the Greek authorities.

Efforts to introduce Canadian squid (Illex Illecebrosus) have not yet met with success. Samples distributed to the Greek trade were reported to be less desirable to Greek customers who felt the product was too large and too tough. Desired tube length is 10 cm. Grading in Canada might overcome these objectives.

C. POTENTIAL

In recent years, only a small amount of Canadian fishery products have entered the Greek market. In addition, many species available from Canada are not immediately applicable to the Greek market. The major species of promise continue to be cod and salmon, as suggested in Table 4.

A combination of local taste, legislative and sanitary criteria and a lack of sufficiently high quality Canadian products, has rendered the outlook bleak for all but the two leading species - cod and salmon. The markets for canned lobster and crab are small and confined to the cruise trade, but have some development capability.

The reader should bear in mind when reading Table 4 that the import forecasts assume:

- The Greek economy will improve, allowing the import price ceiling established for frozen and cured fish products to rise appreciably;
- Greek importers will be successful in introducing increased quantities of frozen fish products to the market;
- Canadian fish products will be quality and price competitive with that of EC member countries.

D. PROBLEMS

The inability of Canadian exporters to meet Greek standards of quality on such products as squid and cured herring has slowed the expansion of the market for Canada's fish exports to Greece. But Greek government tariff and

GREECE: FISH

Table 4: IMPORT MARKET PROJECTIONS, 1981 AND 1985

(tonnes, product weight)

	1976		1977		1978 (Jan-Sept)		1981		1985	
	Total	Fm Cda	Total	FM Cda	Total	Fm Cda	Total	Fm Cda	Total	Fm Cda
COD										
1.1 Round-dressed (fresh)	–	–	133	3	2	–	na		na	
1.2 Fillets										
1.3 Blocks										
1.4 Cured (salted)	6181	59	6617	116	6038	16	6500	100	10000	200
1.5 Canned										
1.6 Other (specify)										
1.7 Roe	10	–	9	–	8	–	na		na	
1.8 Frozen	–	–	*	–	273	–	300		500	20
HADDOCK	NOT APPLICABLE									
REDFISH	NOT APPLICABLE									
TURBOT	NOT APPLICABLE									
HALIBUT										
5.1 Round-dressed		–	45	–	78	–	na		na	
POLLOCK	NOT APPLICABLE									
HAKE	NOT APPLICABLE									
FLATFISH	NOT APPLICABLE									
GRENADIER	NOT APPLICABLE									
HERRING										
11.1 Round	3079	–	35	–	–	–	na		na	
11.2 Fillets			2	–	–	–	na		na	
11.21 Butterfly										
11.3 Blocks										
11.4 Cured (smoked & salted)	–	–	1053	–	794	–	na		na	

Note: na - not available

Table 4 (continued)

	1976		1977		1978 (Jan-Sept)		1981		1985	
	Total	Fm Cda	Total	FM Cda	Total	Fm Cda	Total	Fm Cda	Total	Fm Cda
11.5 Canned										
11.6 Other (prepared)	42		27	–	15	–	na		na	
11.7 Roe										
11.8 Sardines (fresh)			50	–	90	–	na		na	
11.9 Sardines (paste)		–	*		–	–	na		na	
11.10 Sardines (prepared)	2500	–	1498	–	1752	–	na		na	
MACKEREL										
12.1 Round (fresh)	60	–	917	–	–	–	na		na	
12.2 Fillets (frozen)		–	35	–	1	–	na		na	
12.4 Cured										
12.5 Canned										
12.6 Other (bonito & mackerel prepared)	2700	–	2928	–	2675	–	na		na	
11.7 Round (frozen)	105	–	335	–	278	–	na		na	
SALMON										
13.1 Round (frozen)							10	5	20	10
13.2 Fillets/ Steaks			**	**(6)	–	–	–	–	–	–
13.4 Cured (Pickled)			*	–	–	–				
13.5 Canned	54		**	**(44)	**	**(18)	50	20	75	35
13.6 Other (smoked)			**	**(2CWT)	**	**	10	5	15	7.5
13.7 Roe	7		7	*	4	–	1	0.5	2	1

* Quantity less than 1 tonne

** Official statistics indicate no imports, however, the Greek trade states small quantities are being imported from British Columbia.

Table 4 (continued)

	1976		1977		1978 (Jan-Sept)		1981		1985	
	Total	Fm Cda	Total	FM Cda	Total	Fm Cda	Total	Fm Cda	Total	Fm Cda
OTHER FINFISH										
14.1 Round-dressed										
14.2 Fillets										
14.3 Blocks										
14.4 Cured										
14.5 Canned										
14.6 Other Seafish			1828		1133	–	na		na	
14.7 Other Fish (Prepared)			1719	–	1380	–	na		na	
FRESHWATER FISH										
WHITEFISH	N/A									
PIKE	N/A									
PICKEREL & SAUGER	N/A									
LAKE PERCH	N/A									
LAKE SMELT	N/A									
OTHER FRESH-WATER FISH										
20.1 Round	99	–	82	–	93	–	na		na	
20.2 Fillets										
20.3 Blocks										
20.6 Other										
20.7 Frozen					10	–	na		na	
SHELLFISH										
1. SQUID, CUTTLEFISH	3694	–	2799	–	–	–	na		na	

Note: na - not available

and non-tariff restrictions have also played a role.

Imports of fresh and frozen fish are subject to Greek government control in order to protect and encourage development of their deep sea fishing industry. Only limited quantities of import licenses are granted for frozen fish (and occasionally fresh fish), or they are available just for limited periods to cover shortfalls in domestic production of traditional species. Licenses sometimes permit small shipments of species not normally caught by the Greek Atlantic fishing fleet. Due to poor catches in the past couple of years, there has been an increase in licensed frozen fish imports.

Market price controls for both fresh and frozen fish have been in force for a number of years as special measures to control the cost of living. Fishermen and merchants have repeatedly complained that profit margins allowed under the controls have not been sufficient. Upward adjustments have been made from time to time following strong protests, pressures and threats of drastic action by the fishing industry and its traders.

However, government controls are expected to remain in effect for the foreseeable future as Greece tries to reduce inflation to 11.5% during 1979, reduce consumer demand for luxury goods, tighten money supply and introduce measures to stimulate investment.

E. TRADE PRACTICES

Channels of Distribution: Fishery products generally enter Greece through importer (or importer/wholesaler), pass to wholesaler, local distributor and then to retailer and/or institutional trade. Retail outlets are normally small fish shops located in local market places. Supermarkets are not common.

Representatives: Foreign exporters normally appoint an agent (exclusive preferably) in Greece who acts on their behalf for a 2-3% commission.

Products should be quoted C.I.F. Piraeus in either U.S. or Canadian funds.

Non-Tariff Barriers:

- Import license required for most fishery products;
- Price controls (ceilings) set and regulated by the Greek Government for all fishery products except canned product and shellfish;
- Labels on canned fish must state contents in Greek;
- Weight is to be quoted in metric;
- Greek Military Tenders specify that fish must be frozen on board;

- Packing of frozen edible fishery products - date of catch, date of freezing, title of company and its location, title and location of company where freezing took place, kind of fish, etc. is required on outside of each individual item packed as well as on the outer surface of the master carton/crate;
- Sanitary Certificate is required for frozen fish/shellfish.

Following is a list of the most significant requirements of the Certificate:

1. Product must be frozen at -35^{o}C then preserved continuously at a core flesh temperature of less than -18^{o}C throughout the trading cycle.
2. Package according to Greek Government requirements.
3. Ensure that no more than 3 months elapse between date of catch and date of entry (Customs clearance) into Greece.
4. Shipment must be accompanied by an origianl Sanitary Certificate completed in either Greek, English or French a maximum of 15 days in advance of shipping (and never after shipment) issued by the competent authority of the country of origin with authenticity of the signature verified by Greek Consular authorities.

APPENDICES

GREEK DOMESTIC SEAFOOD CONSUMPTION

Major types of seafood of interest to the Greek market
(with equivalent names in English, Latin and Greek)

English	Latin	Greek
FRESH FISH		
Codfish	Merlussius Habbsi	Vakalaos
Mullet, gray	Mugil Sp	Kephalos
White (sea) Bass	Labrax Lupus	
Black Spotted Bass	Dioentrarchus	Lavraki
King of Breams (Pandora)	Pagellus Erythrinus L.	Lithrinia
Red (striped) Mullet	Upeneus Sp.	
	Mullus Surmuletus	Barbounia
Gurnard	Trigli Sp.	Kaponia
Striped Bream	Pagellus Mormyrus L.	Mourmoures
Black Seabream	Spondyliosoma Contharus	Skatharia
Stone Bass	Polluprion Ameriacanums	Vlahos
Saddled Bream	Oblata Melanura	Melanouria
Skorpaena	Scorpaena Sp.	Skorpioi
FRESH OR FROZEN FISH		
Sea Perch (Tropical Cods)	Epinephellus Quaza L.	Rofos
"Schnapper"	Lethrinus Atlanticus	
	Dentex Dentex	Synagrida
White Grouper (Pikes)	Epinephelus Aeneus L.	Sfyrides
Golden Bream (Porgy)	Chrysophys Auratus L.	Tsipoures
Common Sea Bream (Couches)	Pagrus Pagrus	Fagri
School Shark	Mustelus Mustelus L.	
(Smooth Hound)	Mustelus Canis M	Galeos
Tunny (or May) Fish	Sepiola Domerilli R	Mayatiko
Mulloway (Croaker)	Umbrina Girrosa Sciaena Sp. Pseudotolithus Sp.	Mylokopia
Medit. Porch	Epinephelus Alexandrianus V.	Steires
FROZEN FISH		
Sole	Solea Sp.	Glosses
King Clip	Genypterus Capensis	"King Clip"
Redbarch	Lutzanus Sp.	Kokinopsaro
CRUSTACEANS		
Lobster (Grayfish)	Astacus Vulgaris	Astakos
Shrimp	Penaeus Spp.	Garides
	Crangon Crangon	"
	Leander Serratus	"
Scallops	Pecten Alba/Amusium/ Balloti	Ktenia
MOLLUSCS		
Squid	Loligo Vulgaris Lamk	Kalamari
Octapus	Octapus Vulgaris Lamk	Oktapodi
Cuttlefish	Sopia Officinalis L.	Soupies

APPENDIX B

INSTRUCTIONS FOR THE APPLICATION OF THE CUSTOMS TARIFF

A. GENERAL REMARKS.

Within the framework of the association agreement between Greece and the E.E.C., Greece — with the aim of implementing a Customs union with the E.E.C. — is proceeding, on the one hand, with the progressive reduction of the customs duties leviable on products imported from the E.E.C. member-countries until the elimination thereof at the end of the transitional periods of 12 or 22 years as from the date of operation of the association agreement (1.11.1962) and accepts, on the other hand, the customs duty rates set out in the Common External Tariff, with the result that, at the end of the above-mentioned transitional periods, imports from third countries will be liable, both in Greece and in the Community countries, to the payment of the customs duties set out in the Common External Tariff.

In particular, the present tariff, which came into force on 1st November 1974, that is to say at the end of the 12-year transitional period, provides for the following:

1. Products covered by the 12-year customs demobilisation schedule (I):

The customs duties on this category of products shall be totally abolished if the products concerned are imported from the six original members of the E.E.C.; in other cases, the customs duty rates of the Greek Customs Tariff shall be completely aligned on those of the Common Customs Tariff and integrally applied (Articles 14 and 20, Paragraph 1d of the Association Agreement).

2. Products covered by the 22-year customs demobilisation schedule (II):

Users of this tariff are reminded that the first alignment of the Greek Customs Tariff on the E.E.C. Common External Tariff took place on 1st May 1970, that is to say seven and a half years after the entry into operation of the Athens Agreement, with the reduction by 20 % of the difference between the basic duty rates (as on 1st November 1962) of the Greek Customs Tariff and the Customs duty rates as given by the Common Customs Tariff (Article 20, Paragraph 2a).

As from 1st November 1975 (that is to say at the beginning of the 14th year of the operation of the Agreement), the customs duties applicable to products falling within this category shall be aligned (in a second phase) to the extent of 30 % of the difference between the duty resulting from the first reduction of 20 % referred to above and the duty rates of the Common Customs Tariff effectively levied. In the event that the amount of such difference be not more than 15 % above or under the duty rate as given in the Common Customs Tariff, these last shall be applied as from the above-mentioned date (that is to say as from 1st November 1975) (Article 20, Paragraph 2b of the Agreement).

It should be noted that the seventh successive reduction of the duty rates of the Greek Customs Tariff [a total reduction of 44 % of the basic duty rates of the Greek Customs Tariff (1.11.1962)] took place on 1st November 1975 in respect of products falling within this category and imported from the E.E.C. member-countries (Article 15, Paragraph 1. of the Agreement).

3. Products covered by Protocol No. 13 to the Association Agreement (Pr. 13):

The reduction of 20 % (operative as from 31.10.1972) of the basic duty rates of the Greek Customs Tariff in respect of products set out in the List annexed to this Protocol and imported from the E.E.C. countries shall continue to be applied except in the case of articles listed in the following table, for which, in pursuance of the terms of Paragraph 2 of the aforesaid Protocol, different reduction rates are provided:

02.06 A 16.02 B	Ham	40 %
04.03	Butter	30 %
04.04 B5-B9	Cheeses of the European types . . .	35 %

Note should be taken of the fact that when the products listed in this Protocol are imported from third countries, they are not covered by the alignment schedule, but are liable to the payment of the duty rates set out in Columns 6 and 7.

B CONTENTS OF THE NEW CUSTOMS TARIFF:

This Tariff comprises nine columns, each of which gives the following data:

— The first column (1) gives the tariff headings, the numbering of which is identical to that of the Nomenclature of the Customs Co-operation Council (the « CCCN »);

— The second column (2) gives the texts of the headings corresponding to the numbers appearing in the first column, which are identical to the CCCN, as well as the subheadings and other subdivisions.

In order to distinguish the subdivisions, use has been made, in the first place, of capital letters (A, B, etc.), which are further subdivided into Arab numerals (1, 2, etc.), subdivided in turn into small letters (a, b, etc.), and then into Roman numerals (I, II, III, etc.), which are again subdivided into double or multiple small letters (aa, bb, aaa, etc.).

In the case of products covered by the 12-year customs demobilisation schedule, the texts of the corresponding subheadings and other subdivisions are identical to those of the Common External Tariff.

In the case of products covered by the 22-year customs demobilisation schedule, an effort has been made to align the texts corresponding thereto as far as possible on those of the Common External Tariff.

Finally, the presentation of Protocol 13, ECSC and Standstill products in this tariff remains the same as in the 1960 Greek Customs Tariff in view of the fact that the great majority of the customs duty rates applicable to these products has remained unchanged, and it has therefore been deemed preferable to maintain the text of the 1960 Tariff.

— The third column (3) shows the treatment to be accorded to E.E.C. products.

The means used to denote such treatment are the following:

— Roman numerals I and II, which identify those products falling within the scope of the 12-year and 22-year customs demobilisation schedules, respectively;

— The letters and figures « Pr.13 », which identify those products appearing in the List annexed to Protocol No. 13 to the Association Agreement;

— The letters « ECSC », which identify those products falling within the scope of the European Coal and Steel Community;

— The letter « S », which identifies agricultural (Standstill) products specified in Paragraph 2 of Article 37 of the Association Agreement.

— The fourth and fifth columns (4 and 5) give, respectively, the autonomous and conventional duty rates of the E.E.C. Common External Tariff in operation as from 1st November 1974. These duty rates, which with very few exceptions are *ad valorem* rates, are not given in the case of « Pr.13 », « ECSC » and « S » products in view of the fact that the basic duty rates of the Greek Customs Tariff applicable to these products are not aligned on the duty rates of the Common Customs Tariff.

Likewise, these columns do not give the duty rates applicable to products which have not been aligned or of which the alignment has been deferred, after 1st November 1965, under the terms of Paragraph 3 of Article 20 of the Association Agreement.

— The sixth and seventh columns (6 and 7) give the autonomous and conventional duty rates of the Greek Customs Tariff applicable to products not covered by the 12-year customs demobilisation schedule.

These are basic duty rates, that is to say the duty rates effectively applied by Greece at the time the Association Agreement came into force (1st November, 1962).

In so far as products covered by the 12-year customs demobilisation schedule are concerned, it has not appeared necessary to give the basic duty rates of the Greek Customs Tariff by reason of the fact that the customs demobilisation in respect of products imported from the E.E.C. has been completed.

— The eighth column (8) gives the duty assessment bases (*ad valorem* or specific).

— The ninth column (9) sets out the conventional duties applicable as from 1st November 1975 with regard to non-E.E.C. countries.

C. APPLICATION OF THE DUTY RATES SET OUT IN THE NEW CUSTOMS TARIFF.

1. Articles imported from the E.E.C.

(a) *Products covered by the 12-year customs demobilisation schedule (1)*

No duty shall be levied on the above products when imported from E.E.C. countries by reason of the complete customs demobilisation implemented in respect thereof (Article 14 of the Association Agreement). Exceptions to this rule are shown by a special indication and the duty rate applicable in respect of products imported from the European Community is indicated.

Greece. — No. 20 (9th edit.)

General Rules

Interpretation of the nomenclature of the Customs Tariff shall be governed by the following principles:

1. The titles of Sections, Chapters and sub-Chapters are provided for ease of reference only; for legal purposes, classification shall be determined according to the terms of the headings and any relative Section or Chapter Notes and, provided such headings or Notes do not otherwise require, according to the following provisions.

2. (a) Any reference in a heading to an article shall be taken to include a reference to that article incomplete or unfinished, provided that, as imported, the incomplete or unfinished article has the essential character of the complete or finished article. It shall also be taken to include a reference to that article complete or finished (or falling to be classified as complete or finished by virtue of this Rule), imported unassembled or disassembled.

   (b) Any reference in a heading to a material or substance shall be taken to include a reference to mixtures or combinations of that material or substance with other materials or substances. Any reference to goods of a given material or substance shall be taken to include a reference to goods consisting wholly or partly of such material or substance. The classification of goods consisting of more than one material or substance shall be according to the principles of Rule 3.

3. When for any reason, goods are, *prima facie*, classifiable under two or more headings, classification shall be effected as follows:

   (a) The heading which provides the most specific description shall be preferred to headings providing a more general description.

   (b) Mixtures and composite goods which consist of different materials or are made up of different components and which cannot be classified by reference to 3 (a) shall be classified as if they consisted of the material or component which gives the goods their essential character, in so far as this criterion is applicable.

   (c) When goods cannot be classified by reference to 3 (a) or 3 (b), they shall be classified under the heading which involves the highest rate of duty.

4. Goods not falling within any heading of the Tariff shall be classified under the heading appropriate to the goods to which they are most akin.

*5. *The above Rules shall also apply* mutatis mutandis *when determining the appropriate subheading within a heading.*

List of Abbreviations and Symbols

ECSC = European Coal and Steel Community;
Monop. = Monopoly;
pd = paper drachmai;
proh. = prohibited;
Pr.13 = Protocol No. 13 to the Association Agreement;
S = Standstill (products specified in § 2 of Art. 37 of the Association Agreement);
I = 12-year Customs Demobilisation Schedule;
II = 22-year Customs Demobilisation Schedule;
UA = Unit of Account;
CCCN = Nomenclature of the Customs Co-operation Council;
val. = Value.
(a) = Not subject to alignment: duty rates as per Col. 6 and 7.
(b) = Alignment complete: duty rates as per Col. 4 and 5.
(c) = Alignment deferred: duty rates as per Col. 6 and 7.
(d) = Under Art. 20, para. 3, of the Association Agreement, the last alignment of this duty did not take place.

* This note is taken from the E.E.C. Common Customs Tariff.

CHAPTER 3. — *Fish, crustaceans and molluscs.*

Note. — (See CCCN).

1	2	3	4	5	6	7	8	9
03.01	Fish, fresh (live or dead), chilled or frozen :							
	A. Freshwater fish :							
	1. Frozen	S	—	—	20 %	20 %	val.	(a)†
	2. Fresh or chilled :							
	(a) From December 1 to March 31	S	—	—	Free	Free	—	(a)‡
	(b) From April 1 to May 31	S	—	—	15 %	15 %	val.	(a)†
	(c) From June 1 to September 30	S	—	—	30 %	30 %	val.	(b)†
	(d) From October 1 to November 30	S	—	—	15 %	15 %	val.	(a)†
	B. Saltwater fish :							
	1. Frozen :							
	(a) Whole, headless or in pieces :							
	I. Herring, sprats and mackerel :							
	(aa) From February 15 to June 15	I	—	—	20 %	20 %	val.	(c)†
	(bb) From June 16 to February 14 :							
	(aaa) Herring	I	20 %	15 %	—	—	val.	(b)†
	(bbb) Sprats	I	20 %	13 %	—	—	val.	(b)†
	(ccc) Mackerel	I	20 %	20 %	—	—	val.	(b)†
	II. Tunny :							
	(aa) For industries for the manufacture of the preserves of heading No. 16.04	I	25 %	22 %	—	—	val.	(b)†
	(bb) Other	I	25 %	22 %	—	—	val.	(b)†
	III. Sardines	I	25 %	23 %	—	—	val.	(b)†
	IV. Dog-fish	I	15 %	8 %	—	—	val.	(b)†
	V. Rosefish (*Sebastes marinus*) and halibut (*Hippoglossus hippoglossus, Hippoglossus reinhardtius*)	I	15 %	8 %	—	—	val.	(b)†
	VI. Other	I	15 %	15 %	—	—	val.	(b)†
	(b) Fillets :							
	I. Tunny	I	18 %	18 %	—	—	val.	(b)†
	II. Other	I	18 %	15 %	—	—	val.	(b)†
	2. Fresh or chilled :							
	(a) Whole, headless or in pieces :							
	I. Herring, sprats and mackerel :							
	(aa) From February 15 to March 31	I	Free	Free	—	—	—	(b)†

(bb) From April 1 to May 31	I	—	—	15 %	15 %	val.	(c)†
(cc) From June 1 to June 15	I	—	—	30 %	30 %	val.	(c)†
(dd) From June 16 to February 14 :							
(aaa) Herring	I	20 %	15 %	—	—	val.	(b)†
(bbb) Sprats	I	20 %	13 %	—	—	val.	(b)†
(ccc) Mackerel	I	20 %	20 %	—	—	val.	(b)†

Note. — Frozen, fresh or chilled herring of subheadings 03.01 B 1 (a) 1 (aa), 03.01 B 1 (a) 1 (bb)(aaa), 03.01 B 2 (a) 1 (aa)(cc) and 03.01 B 2 (a) 1 (dd)(aaa), imported directly by Greek industries or Greek industrial concerns for the processing of smoked herring and intended for use by such industries and concerns as raw material for such processing, shall be subject to conditions and formalities stipulated by decision of the Minister of Finance and shall be liable to the following duties when imported from non-EEC countries :.

(a) From February 15 to June 15	I	Free	Free	—	—	—	(1)
(b) From June 16 to February 14	I	20 %	15 %	—	—	val.	(1)
II. Tunny :							
(aa) For industries for the manufacture of the preserves of heading No. 16.04	I	25 %	22 %	—	—	val.	(b)†
(bb) Other	I	25 %	22 %	—	—	val.	(b)†
III. Sardines	I	25 %	23 %	—	—	val.	(b)†
IV. Dog-fish	I	15 %	8 %	—	—	val.	(b)†
V. Rosefish (*Sebastes marinus*) and halibut (*Hippoglossus hippoglossus, Hippoglossus reinhardtius*)	I	15 %	8 %	—	—	val.	(b)†
VI. Other	I	15 %	15 %	—	—	val.	(b)†
(b) Fillets	I	18 %	18 %	—	—	val.	(b)†
C. Livers and roes :							
1. Of freshwater fish :							
(a) Frozen	S	—	—	20 %	20 %	val.	(a)†
(b) Fresh or chilled :							
I. From December 1 to March 31	S	—	—	Free	Free	—	(a)†
II. From April 1 to May 31	S	—	—	15 %	15 %	val.	(a)†
III. From June 1 to September 30	S	—	—	30 %	30 %	val.	(a)†
IV. From October 1 to November 30	S	—	—	15 %	15 %	val.	(a)†
2. Of saltwater fish	I	14 %	10 %	—	—	val.	(b)†
03.02 Fish, dried, salted or in brine; smoked fish, whether or not cooked before or during the smoking process :							
A. Herring	Pr.13.	—	—	0.3 pd	0.15 pd	kg.	(a)†

† See List of Abbreviations on Page 1.

(1) Duty rates as per Col. 4 and 5.

1	2	3	4	5	6	7	8	9
	B. Cod, wet-salted or dried	Pr.13	—	—	0.36 pd	0.24 pd	kg.	(a)†
	C. Other fish :							
	1. In brine :							
	(a) Lakerda, Atlantic bonito (pelamid) and mackerel	S	—	—	4.2 pd	2 pd	kg.	(a)†
	(b) Other (salmon, etc.)	S	—	—	20 %	—	val.	(a)†
	2. Salted	S	—	—	2 pd	—	kg.	(a)†
	3. Dried or smoked	S	—	—	20 %	20 %(c)	val.	(a)†
	D. Livers and roes :							
	1. Hard roes	S	—	—	5.9 %	—	val.	(a)†
	2. Other	S	—	—	10 %	—	val.	(a)†
	E. Fish meal (fit for human consumption)	S	—	—	15 %	—	val.	(a)†
03.03	Crustaceans and molluscs, whether in shell or not, fresh (live or dead), chilled, frozen, salted, in brine or dried; crustaceans, in shell, simply boiled in water :							
	A. Crustaceans (e.g. : lobsters, shrimps, prawns and crabs) and molluscs (e.g. : mussels, oysters, and snails)	S	—	—	30 %	—	val.	(a)†
	B. Other molluscs than in A above (e.g. : octopus, cuttle-fish and squid)	S	—	—	25 %	—	val.	(a)†
	C. Meal of products of this heading, fit for human consumption	S	—	—	15 %	—	val.	(a)†

CHAPTER 4. — *Dairy produce; birds' eggs; natural honey; edible products of animal origin, not elsewhere specified or included.*

Notes. — 1 and 2. (See CCCN).

• *Additional Note.* — The term « cans », as used in Note 2 to this Chapter, shall be taken to apply only to containers of the kind referred to when of a net capacity of 5 kg. or less.

04.01	Milk and cream, fresh, not concentrated or sweetened :							
	A. Full cream milk, skimmed milk and buttermilk; whey	S	—	—	10 %	—	val.	(a)†
	B. Fermented milk	S	—	—	25 %	—	val.	(a)†
	C. Cream	S	—	—	50 %	—	val.	(a)†
04.02	Milk and cream, preserved, concentrated or sweetened :							
	A. Whether or not containing added sugar :							
	1. In liquid or paste form	Pr.13	—	—	10.5 %	10.5 %	val.	(a)†
	2. In solid form (block milk or milk powder), (no tare shall be allowed for the immediate containers)	Pr.13	—	—	3.6 pd	2.4 pd	kg.	(a)†
	B. Cream	S	—	—	50 %	—	val.	(a)†
04.03	Butter :							
	A. Melted cooking butter, and sheep's and goat's butter for melting, whether or not salted	Pr.13	—	—	15.6 pd	—	kg.	(a)†

reductions provided for by the above-mentioned Article of the said Agreement shall become operative.

LIST OF GOODS

Headings	Description of goods	Rates applicable
1. 15.07 D	Coconut and palm oils	5 %
2. 15.07 E	Linseed oil	5 %
3. 15.10 A	Stearic acid	5 %
4. 15.10 C 1 (a)	Fatty acids and acid oils from refining containing up to 50 % of oleic acid	5 %

II. In pursuance of Article 18 of Law No. 1805/51, as amended by Article 20 of Decree-Law No. 3394/55, the maximum quota for the animal fats referred to above and intended for industries engaged in the manufacture of glycerol, and qualifying for the reduced rate of duty, was increased to 3,500 tonnes as from 1969 (Par. 1 of Article 3 of Decree-Law No. 837/71).

III. In so far as the EEC countries are concerned, the duty rate provided for under Article 18 of Law No. 1805/51 in respect of the animal fats mentioned above and imported from such countries, shall be suspended up to the extinction of the quotas provided for under Article 20 of Decree-Law No. 3394/55 and Paragraph 1 of Article 3 of Decree-Law No. 837/71, that is to say 2,000 tonnes, increased to 3,500 tonnes, annually (Par. 2 of Article 3 of Decree-Law No. 837/71).

SECTION IV. — Prepared foodstuffs; beverages, spirits and vinegar; tobacco.

CHAPTER 16. — *Preparations of meat, of fish, of crustaceans or molluscs.*

Note. — (See CCCN).

16.01	Sausages and the like, of meat, meat offal or animal blood :							
	A. Dry sausages	Pr.13	—	—	24 pd	12.6 pd	kg.	(a)†
	B. Salamis	Pr.13	—	—	62.2 %	—	val.	(a)†
	C. Hams and other pork, in bladders or guts	Pr.13	—	—	60 %	60 %	val.	(a)†
	D. Other pork-butchers' wares (mortadellas, etc.)	Pr.13	—	—	56.7 %	56.7 %	val.	(a)†
16.02	Other prepared or preserved meat or meat offal :							
	A. Goose liver (whether or not stuffed)	Pr.13	—	—	60 pd	46.8 pd	kg.	(a)†
	B. Ham in airtight containers	Pr.13	—	—	60 %	60 %	val.	(a)†
	C. Other	Pr.13	—	—	60 %	45 %	val.	(a)†
16.03	Meat extracts, meat juices and fish extracts	Pr.13	—	—	40 %	—	val.	(a)†
16.04	Prepared or preserved fish, including caviar and caviar substitutes :							
	A. Caviar and caviar substitutes	I	30 %	30 %	—	—	val.	(b)†
	B. Salmonidae	I	20 %	13 %	—	—	val.	(b)†
	C. Herring :							
	1. Fillets, raw, not further prepared than coated with batter or breadcrumbs, deep-frozen	I	18 %	15 %	—	—	val.	(b)†

† See List of Abbreviations on page 1.

1	2	3	4	5	6	7	8	9
	2. Other	I	23 %	20 %	—	—	val.	(b)†
	D. Sardines :							
	1. Whole, in slices or in fillets	I	—	—	—	—	kg.	4.1 pd (d)†
	2. In paste form	I	25 %	25 %	—	—	val.	(b)†
	Note. — Fish known as « brisling » (*clupea sprattus*) and « sild » (*clupea harengus*), in oil or tomato sauce, headless, in airtight containers, are assimilated to sardines (GATT).							
	E. Tunny	I	25 %	24 %	—	—	val.	(b)†
	F. Bonito, mackerel (including fish known as pilchards) and anchovies :							
	1. Bonito and mackerel	I	25 %	25 %	—	—	val.	(b)†
	2. Anchovies	I	25 %	—	—	—	val.	(b)†
	G. Other :							
	1. Fillets, raw, not further prepared than coated with batter or breadcrumbs, deep-frozen	I	18 %	15 %	—	—	val.	(b)†
	2. Not specified	I	25 %	20 %	—	—	val.	(b)†
16.05	Crustaceans and molluscs, prepared or preserved :							
	A. Shellfish (oysters, mussels and the like)	S	—	—	40 %	22 %	val.	(a)†
	B. Crustaceans :							
	1. Lobsters and freshwater crayfish	S	—	—	50 %	25 %	val.	(a)†
	2. Shrimps	S	—	—	50 %	22 %	val.	(a)†
	3. Crabs	S	—	—	18 %	25 %	val.	(a)†
	C. Molluscs (cuttlefish, octopus, squid, etc.)	S	—	—	40 %	20 %	val.	(a)†

Note to Chapter 16.

No tare shall be allowed for the immediate packings of products falling within this Chapter when liable to specific rates of duty.

CHAPTER 17. — *Sugars and sugar confectionery.*

Notes. — 1 and 2. (See CCCN).

1	2	3	4	5	6	7	8	9
17.01	Beet sugar and cane sugar, solid	Pr.13	—	—	0.3 pd	—	kg.	(a)†
	Note. — The current consumption tax is to be levied, over and above customs duty, on all imports of sugar and of products of all kinds containing sugar.							
17.02	Other sugars; sugar syrups; artificial honey (whether or not mixed with natural honey); caramel :							
	A. Maltose	S	—	—	80 %	—	val.	(a)†

APPENDIX C

LEADING GREEK IMPORTERS OF SEAFOOD

FROZEN

1. Oceanis Commercial Enterprises,
   5 Kifissias Ave., Athens
   Tel: 6427-132 Telex 21-4191 DAHA GR

   Mr. Papastavropoulos

2. C. H. Gofas & Co.,
   2 Kambouroglou St.,
   St. John Kalamarias, Salonica
   Tel: 031-411337

   Mr. C. Gofas

3. G. Tzevelekakis Co.,
   8 Petrou Ralli, Rouf, Athens
   Tel: 347-4034 Telex 21-8345 CMH GR

   Mr. G. Tzevelekakis

4. Mr. V. Papanicolaou,
   6 Lycourgou St., Piraeus
   Tel: 417-6336 Telex 21-2443 ZOYO

5. ACTA Foodstuff Trading Co. Ltd.,
   2 Iakovou Dragatsi St., Piraeus
   Tel: 417-2654 Telex 21-1139

6. ELAMER Ltd.,
   14 Xenofontos St., Athens
   Tel: 3232-920 Telex 21-4233 ELAM GR

   Mr. S. Georgoglou

7. OSTREA O.E.,
   7 Aghiou Mina St., Salonica
   Tel: 031/515-478 Telex 41-8192 ISAG GR

   Mr. C. Dimou

8. "DEMIS" Hadjiantoniou & Co.,
   11 Athinon St., Glyfada, Athens

9. Helleniki Atlantiki Aleiia,
   39 Akti Possidonos, Piraeus
   Tel:

CANNED

1. Ch. Vlachoutsicos Enterprises Inc.,
   1 Illioupoleos St., Hymettus, Athens 455
   Tel: 9750-713 Telex 21-2894

   Mr. D. Mitatsis

2. John Pavlidis,
   15-17 Hadjikyriakou St., Piraeus
   Tel: 4519-990 Telex 21-2894

3. H. S. Fishing Co. Ltd. (Mrs. V. Papanicolau),
   6 Lycourgou St., Piraeus
   Tel: 417-6336 Telex 21-2443 ZOYO

4. ACTA Foodstuff Trading Co. Ltd.,
   2 Iakovou Dragatsis St., Piraeus
   Tel: 417-2654 Telex 21-1139

   Mr. J. Daskalakis

5. GENKA S.A.,
   9 Klisthenous St., Athens
   Tel: 5248-512 Telex 216715

   Mr. A. Karydias

6. Ajamian Bros.,
   3 Mitropoleos St., Athens
   Tel: 324-7075 Telex 21-5185 IPR GR

   Mr. McKennon-Andrew

7. Mavrikos Imports S.A.,
   Marina Zeas A4A, Piraeus
   Tel: 452-7947

   Mr. J. Mavrikos

8. G. J. Nicdakopoulos,
   53 Sofocleous St., Athens
   Tel: 321-9077

SALTED

1. Ch. Vlachoutsicos Enterprises Inc.,
   1 Illioupoleos St., Hymettus, Athens 455
   Tel: 9750-713 Telex 21-2894

   Mr. D. Mitatsis

2. S. C. Lymberopoulos Bros.,
   1 Nikita St., Piraeus
   Tel: 4175-688 Telex 21-2101 LYBER GR

   Mr. C. Lyberopoulos

3. ISSAGOGIKI Vakalaou Epe,
   21 Gounari St., Piraeus
   Tel: 4178-252

   Mr. Kazakos

4. D. Mamais,
   21 Gounari St., Athens
   Tel: 417-5341

5. ELAMER Co.,
   14 Xenofontos St., Athens
   Tel: 3232-920 Telex 21-4233 ELAM GR

6. Mrs. V. Papanicolaou,
   6 Lycourgou St., Piraeus
   Tel: 417-6336 Telex 21-2443 ZOYO

IMPORTERS/AGENTS OF SMOKED HERRING

1. J. Lymberopoulos Sons,
   1 Nikita St., Piraeus
   (Mr. C. Lymberopoulos, Director) Telex: 21-2101 LYB GR

2. D. Mamais,
   21 Gounari St., Piraeus

3. ELAMER Co.,
   14 Xenofontos St., Athens
   (Mr. Sp. Georgoglou) Telex: 21-4233 ELAM GR

4. Ch. Vlachoutsicos Enterprises, Inc.,
   1 Illioupoleos Ave., Hymettus, Athens 455
   (Mr. D. Georgoulias, Import Manager) Telex: 21-5398

5. H. S. Fishing Co. Ltd.,
   6 Lycourgou St., Piraeus
   (Mrs. V. Papanicolaou) Telex: 21-2443- ZOYO

6. Thomas Papadopoulos,
   60 Agissilaou St., Athens

7. INTERCO Commercial Ltd.,
   19 Victoros Hugo St., Athens

8. General Trading Co. Ltd.,
   54 Eschylou St., Athens
   (Mr. Miltiadis Papageorgopoulos)

9. Hanibal Zafiriadis,
   12 Sapfous St., Athens

10. ETANEX S.A.,
    38 Kapodistriou St., Athens
    (Mr. B. Mavrikidis, President)

11. GROSSHEL MARKET,
    Merchants' Organization of Greece,
    76 Pireos St., Moschaton, Piraeus
    (Mr. T. Christoforou)

12. INTERCO Commercial Ltd.,
    19 Victor Hugo St., Karaiskaki Squ., Athens
    (Mr. J. Mavricos)

13. Ajamian Bros.,
    3 Mitropoleos St., Athens
    Tel: 324-7075 Telex 21-5185 IPR GR

    Mr. McKennon-Andrew

APPENDIX D

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Imperial Salmon House,
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