ANNEX TO THE WORLDWIDE FISHERIES MARKETING STUDY: PROSPECTS TO 1985

ITALY

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

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

DRAFT

Annex to the
Worldwide Fisheries Marketing Study:
Prospects to 1985

ITALY

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

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E. Wong
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FOREWORD

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

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

Specifically, the purpose of the Study is to identify the longer term market opportunities for selected traditional and non-traditional species in existing and prospective markets and to identify factors which may hinder or help Canadian fisheries trade in world markets. To date, over 40 country markets and 8 species groups have been analyzed. It should be noted that while the information contained in the Reports was up-to-date when collected, some information may now be dated given the speed with which changes are occurring in the marketplace. In this same vein, the market projections should be viewed with caution given the present and still evolving re-alignment in the pattern of international fisheries trade, keeping in mind the variability of key factors such as foreign exchange rates, energy costs, bilateral fisheries arrangements and GATT agreements which have a direct effect on trade flows.

Notwithstanding, the findings contained in these Reports represent an important consolidation of knowledge regarding market potential and implications for improvements in our existing marketing and production practices. The results of the Study should, therefore, usefully serve as a basis for planning fisheries development and marketing activities by both government and industry in order to capitalize on the identified market opportunities.

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

Ed Wong

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WORLDWIDE FISHERIES MARKETING STUDY

ITALY

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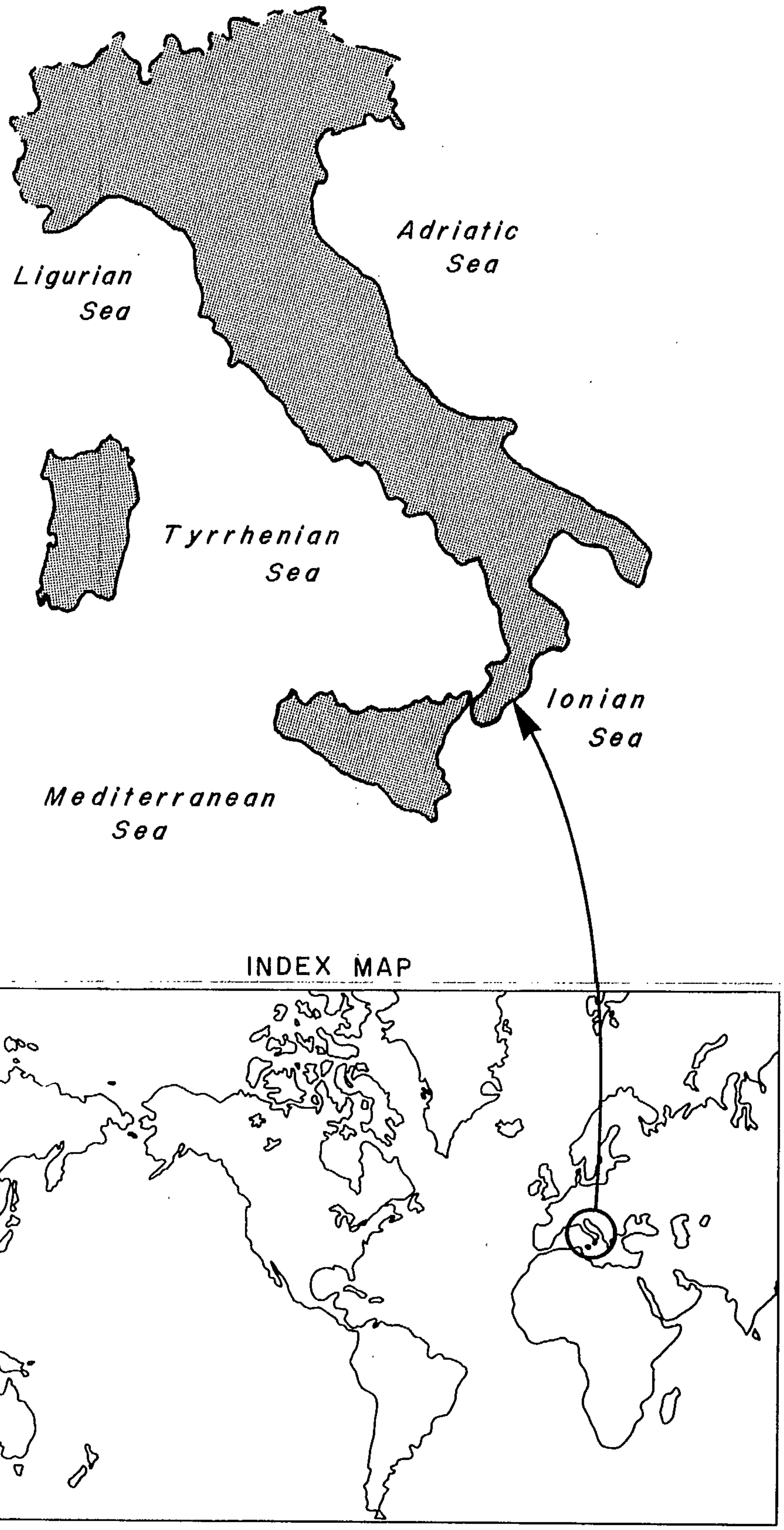
Adriatic Sea
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A. INTRODUCTION

The peninsula of Italy has a long coastline but the potential for fishing is varied. The continental shelf along the west coast is very narrow and most fishing in national waters is concentrated in the shallow Adriatic Sea. Italy also has a distant water fleet operating mainly in the Atlantic.

Production from the domestic fishery has been declining for the past 30 years due to overfishing in national waters and, since 1977, reduced fishing opportunities in foreign waters. Imports have thus been rising steadily.

Italy's population was 57 million in 1980 and is expected to reach 59 million by 1985. Fish consumption (12.5 kilograms per capita in 1978) is moderate compared with other countries in Western Europe. The role of fishery products is mainly to add variety to the diet as they contribute only 8% of total animal protein intake. There is evidence that fish consumption in Italy has actually been underestimated but it is nevertheless expected to increase only moderately to 1985. The main factors leading to an increased consumption are the population growth, a small increase in personal incomes and improvements in the distribution system for fresh fish.

There may be some changes in the species eaten. Italians traditionally have preferred demersal to pelagic species, but the latter forms the bulk of the domestic catch. The government is attmepting to promote pelagic species such as anchovies, sardines and other bluefish in order to maintain the socio-economic role of the inshore and artisanal fishery. They also hope to minimize, or at least slow down, the growing fishery trade imbalance. Inland fisheries and aquaculture developments are also a government priority, especially in the Po region.

Within Italy there are striking regional differences in eating habits and average income. (see Table 1). The Northern Italians are more affluent and consume more high value products such as salmon. The Southern Italians eat more fish, but with lower incomes and fewer refrigeration facilities they tend to favour locally caught fresh fish and imported salt cod.

Italians are low on general frozen food consumption, estimated currently at 2.2 kilograms per capita per year. It represents less than 0.5% of total food production, and of this, only about one-third is fish products. However, in the past years (1969-1977) total frozen food consumption jumped by about 20% annually from 33 000 to 133 000 tonnes, while according to Italy's Frozen Food Institute, the retail frozen fish consumption in Italy grew only 6.9% annually (cumulative) between 1973 and 1978. (see Table 2).

TABLE 1

Italy per-capita expenditure pattern, 1976

		Total Italy	North West	North East	Central	South & Is.
Total monthly expenditure, C$[1/]		157	187	177	167	118
Food, % of total		38	37	36	38	42
As % of food:	fish	3	2	2	4	5
	meat	30	31	30	33	28
	Others	67	67	68	63	67
Indexed: 100 = total Italy						
	Total	100	119	112	106	75
	Food	100	115	105	105	83
	Fish	100	62	64	119	138
	Meat	100	118	101	113	76

1/1C$ = 842 Lira

Source: Italian Yearbook of Statistics.

TABLE 2

Italy retail frozen fish consumption, 1973-1978

(000 tonnes)

	1973	1974	1975	1976	1977	1978	Cumulative annual growth %
(1) Molluscs & crustaceans	3.6	3.9	4.2	5.6	5.3	5.0	6.9
(2) Cruyovac whole fish	5.9	6.5	9.2	7.4	8.5	8.6	7.8
(3) Fish fillets	5.5	5.3	6.7	7.7	8.1	8.1	7.8
(4) Fish fingers	5.3	5.9	6.6	6.6	6.8	7.1	6.1
(5) Other fish products	2.6	2.7	3.2	3.7	3.3	3.2	0.4
Total	22.9	24.3	29.9	31.0	32.0	32.0	6.9

Notes:

(1) One-third is Floriatic sea clams; others are squid, octopus, shrimps, etc.

(2) H & G small hake from S. Africa and Dover Sole account for major share.

(3) Mostly I.Q.F. plaice fillets from Holland.

Source: Italy's Frozen Food Institute.

B. DEMAND

1. Present consumption of fish and trends to 1985

The United Nations Food and Agriculture Organization (FAO) estimates that Italy's per-capita consumption of fish in 1978 was 12.5 kilograms, roughly equivalent to 710 000 tonnes live weight. This is probably an underestimation due to incomplete reporting of coastal fishing. In 1979 Italy's officially reported catch was just under 400 000 tonnes but some authorities would place it at over 700 000 tonnes. This would mean that consumption rates are also higher. Using a conservative adjustment of 200 000 tonnes to the officially reported catch, per capita consumption between 1977 and 1979 actually averaged 16.8 kilograms per annum.

Based on the official estimate of 12.5 kilograms per capita consumption in 1978, the FAO projected an increase of 14.2 kilograms per capita by 1985, resulting in a tonnage increase of 20% during the seven-year period. If the current per capita consumption is actually much higher, then the per capita increase through 1985 would be smaller, resulting in a consumption tonnage increase of around 10%. This could actually be too optimistic, considering that a persistent increase in fish prices relative to meat and other protein is highly probably in the future.

2. Demand by Major Products

According to a 1976 retail purchase survey, fish was consumed mostly fresh (74%) with the rest frozen (7%), canned (12%), and salt/dried (7%). The distribution is said to have changed very slightly since then with some increase in the frozen segment, a trend that is expected to continue through 1985.

a) Fresh Fish

The supply/demand situation of fresh fish in Italy is estimated as follows:

TABLE 3

Italy, Imports, exports, catch and consumption 1977-1979

(Round Weight Equivalent in 000 Tonnes)

	1977	1978	1979
IMPORTS			
Fresh/frozen fillets	32	45	74
Fresh/frozen others	166	196	212
Dried/salted/smoked	152	156	176
Prepared/canned	40	38	48
Total	490	435	510
EXPORTS			
Fresh/frozen	56	76	103
Dried/salted	1	1	2
Prepared/canned	4	6	9
Total	61	83	114
DOMESTIC CATCH (Official)	339	358	381
1/ Adjustment	200	200	200
CONSUMPTION	968	910	977
Aver. Year Per Capita		- 16.8 kg. -	

Note: 1/ due to underestimations.

Note: Assume the following roundweight factors,

. fresh/frozen fillets 3.2
. dried/salted products 4.0
. canned/prepared products 1.5

Source: Instituto Centrale di Statistica (ISTAT), Rome, Italy, 1979.

TABLE 4

Italy: supply/demand situation for fresh fish

000 tonnes	1975	1976	1977	1978	1979
Domestic production	367	379	333	351	406
Imports	134	143	135	153	165
Exports	80	70	51	77	103
Adjustments (stock)	-3	0	-13	-17	-18
Consumption	424	452	404	410	450
Kg. per capita	7.6	8.0	7.1	7.2	7.9

Source: Instituto Centrale di Statistica (ISTAT), Rome, Italy, 1979

Once again the data are questionable. Domestic production and consequently domestic consumption is likely to be much higher. The trends, however, are significant, showing that consumption has been stable, and imports have been on the rise.

The preferred fresh fish products are generally quality species from Mediterranean waters, namely sole, plaice, hake, red mullet, sea bass, cuttlefish and squid. Imported close substitutes are acceptable and consumers are gradually turning to frozen-on-board imports, thawed and sold as fresh or frozen-on-shore fish. However, even those transported rapidly on land from the West European seaports and maintained at good quality standards cannot easily command the premium prices of the locally landed products.

As substitutes for the demersal species, the more abundant pelagic species or bluefish are much less acceptable. Despite the current promotion programs, it is not likely that anchovies and sardines, for example, will ever be significant in the fresh fish market.

The traditional fresh fish supply will be tight in the future as the Mediterranean catch of the preferred species is expected to slow down while the distant-water fishing in the Atlantic is expected to decline because of more limited allocations. Prices are expected to soar, particularly as imports grow. Demand can therefore be expected to grow only moderately, perhaps just matching the population growth of 4% from 1978 to 1985.

b) Frozen fish

The consumption of frozen fish, though still quite small, will probably be the biggest growth area. Demand will increase with better marketing (particularly distribution, product development and promotion), increasing incomes, more female participation in the labour force, and a growing demand for convenience foods. A leading processor/retailer noted that in terms of frozen fish product tastes, the Italians are 15 years behind the rest of their European neighbours, but they are now catching up.

The pattern of growth is expected to relate to the striking regional differences in eating habits and average income. (See Table 2). The northern Italians are expected to contribute heavily to the growing QFF fish consumption, although the middle class consumers in central, and more moderately in southern Italy, are expected to follow suit. The southern Italians will continue to favour locally caught fresh fish and imported salted cod.

c) Canned fishery products

Italy's canning industry has grown considerably in the past 20 years. The tuna processing segment in particular is considered one of the most modern in the world, consisting of some 30 plants capable of producing 70 000 tonnes per year at full capacity. Some 10 000 tonnes of tuna are supplied domestically as raw material but imports accounted for over 70 000 tonnes in 1979, up from 56 000 in 1977. Tuna had in fact the biggest dollar value increase in the past three years among import items. The FAO estimated that in 1978 the rest of the canning industry processed some 50 000 tonnes of molluscs, including deep-frozen squid, and 15 000 tonnes of mackerel, anchovies and sardines.

At present, the canning industry is in crisis, mainly because of rising labour costs and of the current customs agreement between the European Economic Community (EC) and third countries. No dramatic improvements are expected in these areas and, as a result, only moderate growth is expected in the industry. Canned imports will probably grow at around 8% annually through 1985, as they have in the past three years.

d) Salted/dried/preserved products

Along with the fresh fish consumption data, Italy's ISTAT estimated that the country's salt/dried/preserved fish consumption was growing moderately until 1977, but has since been stable at 119 000 tonnes per year. Imports have increased their share of supply, from 32% in 1977 to 37% in 1979. Backed mainly by traditional tastes, consumption is now expected to show a very gradual decline through 1985. Domestic production is expected to weaken further and as for imports, either a worsening trade imbalance will dictate controls or continuing price increases will trigger consumer resistance. There seem to be some growth opportunities for the convenience-type of dried/salted products as is being successfully demonstrated, for example, by the "filletonis" which are now imported from Norway and Spain. If pushed further, this type of product could prevent a decline of the total salt/dried/preserved fish demand for awhile.

3. Marketing

The marketing efforts by processors/retailers such as Findus (70% of retail) and Frigodaunia S.P.A. (10%) are expected to trigger higher growth in the frozen fish segment of the market. The key objective of Sages-Findus is to improve consumers' attitudes towards frozen fish. They aim to do this by controlling merchandising and distribution through a well serviced network of retailers and distributors. Sages-Findus are backed by Unilever, which has used this strategy very successfully elsewhere.

Both Sages-Findus and Frigodaunia are weak in the catering/industrial segment of the frozen fish market which is bigger than the retail segment but is controlled traditionally by independents. Findus' strategy is to use Unilever's backing to provide financial support to the independents. Such financial influence is expected to become a control on operations eventually control, particularly on the purchasing side. The aim is not only to increase the share of the market but also to organize the supply country-wide, stabilize raw material inventories, control costs and prices and take advantage of the growth potential of the overall frozen fish market. Sages-Findus will therefore have an influence on Italy's groundfish imports, and Canadian exporters would do well to build good relationship with the corporation. Sages-Findus could also become an influence on quality control.

Frigodaunia, on the other hand, is the government's arm in promoting Italy's pelagic species or bluefish as substitutes for the import-intensive demersal species. Ancoopesca S.P.A., is the producing arm for the pelagic fish products.

Frigodaunia will remain as much an importer as Sages-Findus and perhaps as aggressive in promoting frozen fish in general. In fact, the company is opening 3 new factories, two of which will process pre-cooked fish products and prepared meal packs. The company is also in position to discuss two-way container utilization through exports of frozen agricultural products to Canada.

Recognizing perhaps the growth potentials of the frozen fish business in the country, the Italian government is putting in place very tight health and packaging regulations, particularly on quick-frozen consumer packs. The processors' reaction to these regulations vary, but they agree that the implication will be tight quality and specifications control of their imports, e.g. even beyond the government's licence requirements for producing plants in exporting countries. As far as Canadian exporters are concerned, meeting these requirements will be one of the key success factors.

C. SUPPLY

1. Domestic Catch

As mentioned earlier, statistics in Table 5 are believed to be gross under-estimates of the Italian catch. Some authorities would even double the figures. There is agreement, however, on the fact that the domestic supply has been on a long-term decline in the last 30 years, leading to a marked increase in imports. Some catch improvement occurred in recent years, e.g. an increase of 12% in 1979 over 1977, but only a few species have shown significant increases - anchovies (more than doubled), common dentex, Atlantic mackerel, and squid. The same species are expected to maintain growth in the next few years though at reduced rates.

The catch statistics in Table 6 show that in 1976 around 10% of the total came from the Atlantic, 85% from the Mediterranean/Black Sea and 5% from Inland areas. Estimates are just slightly different for 1979 with some decline for the distant-water Atlantic catch, mainly in the strongly preferred demersal species.

Italian ocean trawlers now number around 45, representing 20 to 25 firms all of which have distribution links within the country and most of which are involved in importing fish products. All are in trouble financially because of reduced fishing allocations in foreign waters and delays in negotiating fisheries agreements. They now fish off the coasts of Senegal, Guinea Bissau, South Africa, Somalia and the US. Negotiations are still in progress with Mauritania, Tunisia, Libya and Yugoslavia. There is increasing difficulty in getting favourable agreements through the EC which tends to occupy itself more with its larger members in the north. In addition, the Italian fleet is having problems maintaining crews and absorbing rising fuel costs.

The trawler owners have government support in pursuing joint ventures and trading purchase committments for fishing allocation. They can become important channels for imports in the canning, quick-frozen and "catering" sectors of the Italian market.

TABLE 5

Italy: Domestic catch by major species, 1977-1979
(000 tonnes landed weight)

(1979 Rank)	1977	1978	1979
Fish			
Anchovies	40.6	51.7	83.3
Sardines	40.8	51.5	50.0
Cod, haddock, hake	14.7	11.5	12.4
Red mullet	9.3	7.3	8.9
Bogues	9.8	9.0	8.3
Horse mackerel	7.9	7.7	7.4
Grey mullet	7.3	6.1	6.2
Gobies	3.8	4.0	4.0
Common dentex	0.6	0.6	3.9
Atlantic mackerel	2.8	3.1	3.4
Swordfish	3.2	3.9	3.4
Sole	2.8	2.6	3.3
Others	108.4	127.6	103.3
Sub-Total	252.0	286.6	297.8
Molluscs			
Cuttlefish	10.0	8.0	9.5
Octopus	8.4	8.6	8.0
Common squid	4.3	3.9	8.0
Flying squid	3.9	2.8	8.0
Mussels	4.3	4.6	5.5
Curled & musky octopus	2.3	3.0	2.3
Others	33.1	21.3	23.0
Sub-Total	66.3	52.2	64.3
Crustaceans			
Shrimp	6.1	5.8	6.9
Mantis squillid	4.7	4.0	4.0
Giant red shrimps	1.9	1.8	2.2
Norway lobsters	3.5	2.8	2.1
Spring/European lobster	0.6	0.8	0.8
Others	3.7	3.8	2.6
Sub-Total	20.5	19.0	18.6
Grand Total	338.8	357.8	380.7

Source: IBID.

TABLE 6

Catches by Italian fishermen by fishing area, 1973-76
(000 tonnes, live weight)

Region	1974	1975	1976
Inland waters	17.8	19.1	21.3
N.W. Atlantic	4.7	4.4	7.7
Mediterranean and Black Sea	364.1	352.0	354.5
E. central Atlantic	37.8	30.2	25.0
S.E. Atlantic	6.9	11.3	11.8
W. central Atlantic	--	--	--
Total	431.3	417.0	420.3

Source: FAO, Yearbook of Fishery Statistics, Rome, Italy, Various volumes.

As for the Mediterranean and Black Sea fishing grounds, there is little hope for further exploitation through 1985, particularly of demersal species. There is strong evidence that most of these, including some crustaceans, are already overfished. Most pelagic stocks appear to offer better prospects, but the lack of consumer acceptance will limit production.

The inland freshwater fishery (trout and eel) and aquaculture (oysters and mussels) activities are heavily supported not only by the Italian government through the National Council For Research but also by EC development grants. However, these will have only a very gradual long-term impact on total supply.

2. Imports

As can be seen in Table 8, in live-weight equivalent, roughly half of the officially estimated consumption comes from imports which were worth over C$ 800 million in 1979. The tonnage increased by 24%, but average value rose 87% during the two-year period. Exports have not quite caught up with imports, and as a result, the worsening trade deficit has become a major concern to the government:

TABLE 7

Italy: Fisheries import/export balance

	000 tonnes			Million C $		
	1977	1978	1979	1977	1978	1979
Imports	251	275	310	428	585	804
Exports	61	84	114	58	81	137
Deficit	189	190	196	370	504	667

Source: ISTAT

Imports are expected to grow and the gap will almost certainly continue to widen, although the rate of growth may be limited by various government controls, particularly through the EC. There is a tendency for the large fishing companies that own the large distant-water boats to exercise a strong influence in tying imports of fresh/frozen fish to the fishing allocation. Their main objective being to keep their boats busy. Through their association, the Federazione Nazionale delle Imprese di Pesca, whose members are importers and producers at the same time, they are willing in return to act as guaranteed importers. They appear to lead the government authorities in this area. For example, they claimed to have made direct representations to the US government which resulted in "good" 1980 catch allocations of 2 000 tonnes each for Illex and Loligo squid. Negotiations for 1981 began with the Italians requesting allocations for up to 19 vessels, as follows:

Long-fin squid	10 000 Tonnes
Short-fin squid	10 000 Tonnes
Mackerel	2 000 Tonnes
Butterfish	1 000 Tonnes
Silver hake	2 000 Tonnes
Total	25 000 Tonnes

Over-the-side sales will also be involved; and in general, the fleet owners are optimistic. They point out the fact that the US controls allocations of fish to individual EC countries rather than relying on the Brussels bureaucracy. The

TABLE 8
Italy: Imports of fishery products by major species
(For human consumption only)

	000 tonnes			Millions C$		
	1977	1978	1979	1977	1978	1979
Fresh, frozen						
Salmon	0.7	0.6	1.4	4.7	4.3	11.8
Eel	2.4	2.8	3.3	6.7	9.8	15.1
Tuna for canning	55.9	61.1	72.3	76.0	90.7	132.0
Tuna, others	6.8	5.2	2.8	10.0	8.4	5.9
Mackerel	*	6.8	9.1	*	5.1	8.1
Saithe fillets	*	1.2	2.1	*	1.4	3.1
Saithe, others	5.2	7.3	5.7	2.7	5.3	4.3
Hake, Atlantic cod, fillets	2.9	1.1	2.0	3.5	2.6	4.4
Hake, Atlantic cod, others	12.5	7.6	3.4	7.1	5.8	2.9
Sole	*	3.0	2.6	*	13.4	16.0
Shark	6.2	7.4	8.1	9.4	14.5	18.4
Others, fillets	*	12.2	19.0	*	38.8	72.7
Others, non-fillets	*	32.8	37.0	*	74.5	100.1
Sub-total, finfish	*	149.1	168.8	*	274.6	394.8
Squid	15.6	23.0	30.2	17.9	47.3	52.9
Cuttlefish	8.3	9.5	7.5	9.6	13.0	14.6
Octopus	4.8	8.5	7.6	4.2	10.2	13.9
Shrimps	*	5.0	4.4	*	18.5	22.7
Mussels	*	7.7	7.0	*	3.6	5.8
Oysters	*	0.8	1.4	*	0.6	1.4
Others	*	6.5	7.7	*	20.6	31.6
Sub-total, shellfish	*	61.0	65.8	*	113.8	142.9
Total fresh, frozen	186.3	210.1	234.6	270.6	388.4	537.7
Dried, Salted, Smoked						
Cod, dried, non-salted	4.6	6.1	5.3	26.6	40.8	43.8
Cod, dried salted	28.7	12.2	15.6	62.3	31.1	45.4
Cod, wet salted	--	12.5	11.7	--	30.9	34.9
Cod, salted fillets	0.3	3.9	5.6	0.6	11.1	19.6
Anchovies	2.8	2.8	3.6	6.5	6.8	10.5
Herring, smoked	0.1	0.1	0.2	1.7	2.9	4.4
Herring, dried, salted	--	0.1	0.1	0.1	0.4	0.2
Others	1.3	1.5	1.5	3.1	4.4	5.3
Sub-Total	37.8	39.2	43.6	100.9	128.4	164.1
Prepared, Canned						
Salmon	0.3	0.3	0.8	1.2	1.4	3.5
Sardines	1.9	1.1	1.4	3.1	2.3	3.7
Tuna	1.0	1.7	2.5	2.8	6.7	10.8
Mackerel	5.9	6.6	6.9	10.7	14.1	17.3
Anchovies	0.3	0.2	0.2	1.1	1.0	1.1
Others (e.g. fillets)	11.7	10.3	13.9	26.8	31.4	48.6
Sub-Total	21.1	20.2	25.7	45.7	56.9	85.0
Others	5.4	5.0	6.3	10.6	11.5	16.9
Grand Total	250.6	274.5	310.2	427.8	585.2	803.7

* = not available in detail
Source: ISTAT
Note: 1C$ = Liras: 826 (1977), 743 (1978), 709 (1979).

TABLE 9

Italy: Exports of fishery products by major species
(For human consumption only)

	000 tonnes			Million C$		
	1977	1978	1979	1977	1978	1979
Fresh, Frozen						
Sardines	27.9	32.0	37.9	6.8	17.1	21.1
Trout	3.3	2.7	4.6	7.4	7.1	14.4
Eels	0.3	0.4	0.7	1.7	2.8	6.3
Tuna	0.9	0.7	1.4	2.3	2.0	4.9
Anchovies	3.4	5.3	9.5	1.1	1.9	4.2
Cod, Atlantic	0.4	0.6	0.5	0.5	0.5	0.5
Others	*	8.6	14.1	*	15.6	28.1
Sub-total, finfish	*	50.3	68.7	*	47.0	79.5
Squid	*	0.6	1.4	*	1.3	3.7
Oysters	*	0.8	2.1	*	0.7	2.6
Mussels	*	0.8	0.7	*	0.5	0.9
Cuttlefish	*	0.9	0.5	*	2.3	1.6
Others	*	22.9	30.0	*	8.7	17.0
Sub-total	*	26.0	34.7	*	13.5	25.8
Total, fresh, frozen	55.7	76.3	103.4	44.8	60.5	105.3
Dried, Salted, Smoked						
Anchovies	0.9	0.8	1.2	1.1	1.3	2.2
Others	0.3	0.4	0.7	0.9	1.7	2.8
Sub-total	1.2	1.2	1.9	2.0	3.0	5.0
Canned, Prepared						
Tuna, canned	2.2	2.9	3.2	5.7	11.0	13.7
Anchovy, canned	0.4	0.4	0.6	1.4	1.9	3.0
Sardines	1.3	0.5	1.4	3.1	1.4	3.9
Others	--	1.0	1.4	--	3.0	4.6
Sub-total	3.9	4.8	6.6	10.2	17.3	25.2
OTHERS	0.4	1.3	2.5	0.7	1.0	1.1
Grand Total	61.2	83.6	114.4	57.7	80.9	136.6

* Not available in detail

Note: 1C$ = Liras: 826 (1977), 743 (1978), 709 (1979)

Source: ISTAT

fleet owners suggest the Canadian government should deal directly with EC member countries and even non-government groups such as their own association for similar allocations. They also talk of joint ventures, preferably with developed countries such as the US and Canada.

Frozen fish imports rose by 37% from 1977 to 1979, much more than did fresh fish:

TABLE 10

Italy: Fresh and frozen fish imports

(000 tonnes)

	1977	1978	1979
Fresh	135	153	165
Frozen	51	57	70
Total	186	210	235

Source: ISTAT

As already noted, this growth pattern is expected to continue in favour of frozen fish. Of the total fresh/frozen imports in the last 2 years, some 28% were shellfish. Of this, squid accounted for half and was the only significantly growing shellfish item in 1979.

3. Supply situation by species

a) Hake

A major Italian source of supply of hake is Argentina through imports and joint-venture catches by the Italian distant-water fleet. Catch allocations also come from African Atlantic coastal waters, while other imports come from South Africa, the USSR, Bulgaria and Spain. Pacific hake, caught in Chilean waters is considered to be of good quality.

Also imported in quantities from Argentina are fresh and frozen skinless fillets (pin bone and black spots removed) and blocks mostly in 15-lb. (6.8 kilogram) cartons. These products are also frozen on board Italian boats.

Some fresh/frozen fillets are imported from Holland and the FRG, although the volumes decreased considerably last year.

b) Cod

Often confused with hake, in the Italian market as both are known as "merluzzi" frozen cod imports recently have come mostly from the FRG, Norway, Denmark and Japan. In 1979, these countries supplied some 1 500 tonnes of frozen whole/dressed and over 2 500 tonnes of frozen/whole cod products, compared to virtually nil previously. Italy's own cod catch is lumped together with hake, haddock and other demersal species, but the total of 12 300 tonnes in 1979 shows a slight increase from 1978 and a decline from 1976-77.

Cod products are processed into retail packs of 200, 300 and 400 gram fillets. They compete mostly with plaice, saithe, "small cod" from the West African waters, and hake or whiting from Argentina. It is worth noting that supplies from Denmark have recently increased. Preference for frozen-at-sea products has not been stressed recently. A Findus production manager noted that "expert and conscientious handling by fishermen" in Denmark has been a favorable factor. However, fish fingers and portions are still imported mainly from the FRG.

c) Pollock/saithe

The limited supply of Pacific pollock comes mostly from the cold waters off Chile. Those caught off Japan are avoided because of parasites.

According to recent statistics, saithe imports have increased substantially from 5 000 tonnes in 1977 to 8 000 tonnes in 1979. The growth has been mostly in fresh/frozen fillets.

d) Plaice/sole

Fresh and I.Q.F. plaice fillets are imported mainly from the Netherlands and Denmark. The same countries also supply fresh/frozen whole plaice, although small fish are also caught by Italian fishermen in the Mediterranean.

The Netherlands supplied some 3 000 tonnes of sole, mostly fresh/chilled/ frozen and whole/dressed, during the last two years.

e) Mackerel

The Italian catch of Atlantic mackerel has been stable at around 3 000 to 3 500 tonnes during the last four years. Imports, on the other hand, have been increasing both in terms of fresh/frozen (9 100 tonnes in 1979) and canned (6 900 tonnes) products. The USSR, Poland and Bulgaria, whose fleets catch mackerel in the Atlantic and also buy over-the-side from Canadian and British ships, are major sources of supply, mostly at very low prices. In recent years, they have been joined by the UK, Denmark, France and The Netherlands, which together accounted for about 50% of the fresh/frozen imports.

Canned mackerel is imported from Japan, and large volumes of preserved or prepared mackerel are supplied by Portugal (2 700 tonnes in 1978).

f) Herring

Dried/salted and smoked herring are specialty imports from The Netherlands, France and West Germany. Their combined sales to Italy increased steadily to more than 300 tonnes in 1979. The UK also supplied 1 400 tonnes and 950 tonnes of herring in 1978, and 1979, respectively. Imports of Canadian bloaters jumped to 74 tonnes in 1979 from almost nothing previously. Most of this fish is served to Northern European tourists.

g) Salmon

Smoked and canned salmon are luxury products in Italy, and in spite of fast-rising prices, the demand has increased and so have imports in recent years. Some 1 400 tonnes of frozen salmon came into the country in 1979 mostly from Canada and the US, and that was about twice the volume for 1977. As well, some fresh/chilled salmon came from Denmark. Most of the imported salmon is smoked locally to specifications dictated by the Italian market preference. Italians prefer large (3-5 kg.), heavy-smoked sides, dark red and only lightly salted. Flesh should be firm to allow for heavy handling in the restaurants and catering trade. These markets are strong throughout the year. A seasonal market for smaller family-size gift packs (2-3 kg.) occurs at Christmas.

Imports of smoked salmon amounted to some 200 tonnes in 1979, mostly from France, The Netherlands and Denmark, although some came from the UK. European smoking and packaging methods are preferred, which accounts for Canada's failure to so far penetrate this market.

Canned salmon consumption has grown significantly in recent years as shown by growing imports, mainly from Canada, the USSR, and last year at least, also from the US as shown in Table 11.

TABLE 11

Italy: Salmon imports

	000 Tonnes			Million C$		
	1977	1978	1979	1977	1978	1979
Fresh/chilled/frozen - Total	695	620	1 416	6.08	6.95	8.21
Canada	392	351	881	6.90	6.89	7.72
US	245	207	497	3.39	8.39	9.30
Japan/Norway/others	58	62	38	--	--	--
Smoked - Total	97	135	192	17.24	21.15	23.09
France	22	24	48	13.63	18.83	19.89
Netherlands	39	53	58	20.05	24.13	26.94
Denmark	24	36	59	16.33	20.00	21.35
Canada	--	11	11	--	15.81	20.27
Others	12	11	16	16.58	21.00	27.06
Canned - Total	310	350	768	4.02	4.11	4.50
Canada	254	203	522	3.74	3.87	4.43
USSR	11	120	155	3.09	3.37	3.61
US	8	13	67	3.37	4.07	4.34
Others	37	14	24	--	--	--
Grand Total	1 102	1 105	2 376	6.48	7.78	8.21

Source: ISTAT

Note: 1C$ = Liras: 826 (1977), 743 (1978), 709 (1979).

h) Other Finfish

Dogfish headed and gutted is imported from South America. I.Q.F. fillets of Greenland halibut and turbot were also imported from Japan on a trial basis. However, the introduction of these new species did not succeed perhaps because the Italians are suspicious of unfamiliar products.

i) Squid

Italians consume 30 000 to 35 000 tonnes of squid annually, mostly in mixed seafood dishes or as hors d'oeuvres. Processors prefer the Loligo species because they tend to remain firmer.

The domestic fishery in the Mediterranean supplied about 4 000 tonnes of loligo squid. Italian catches in the Atlantic appear to be on the increase and can be expected to grow even more if the country's hopes for allocations in US waters materialize.

Nonetheless, Italian imports of loligo squid have increased substantially in recent years mostly from South Africa, Panama, Thailand and Japan.

Catches of illex and other squid species have averaged just over 8 000 tonnes in the last 5 years, mostly from the northwest Atlantic. This catch level can be expected to remain stable through 1985, especially if the Italians can get their allocations for US waters.

TABLE 12
Italian squid supply, 1977-1979

		000 tonnes		
		1977	1978	1979
Loligo	Catch	10.7	5.7	8.0
	Imports	9.3	17.1	19.1
	Exports	0.5	0.4	0.8
	Supply	19.5	22.4	26.3
Illex	Catch	9.2	7.9	8.0
	Imports	6.2	5.9	11.2
	Exports	1.4	0.2	0.6
	Supply	14.0	13.6	18.6
Total supply		33.5	36.0	44.9

Source: ISTAT

TABLE 13

Squid Imports

	000 tonnes		
	1977	1978	1979
Loligo and ommastrephes sagittatus			
Japan	1.8	2.7	2.9
Thailand	2.2	6.3	7.3
S. Africa	--	0.8	1.3
Panama	--	1.0	1.4
Malaysia	--	0.5	0.7
Others	5.3	5.8	5.5
Total	9.3	17.1	19.1
Illex and others			
Bulgaria	2.5	2.1	4.5
Poland	2.4	--	2.5
Russia	--	0.4	1.7
France	0.8	0.9	0.4
Canada 1/	--	--	0.3
Others	0.5	2.5	1.8
Total	6.2	5.9	11.2

1/ According to Statistics Canada, Canadian exports to Italy were 850 tonnes of frozen whole and 472 tonnes of tubes in 1979. Most of these sales were in the final weeks of the year.

Source: ISTAT

In late 1979, there was a flood of low-priced illex imports from the USSR, Bulgaria and Poland. This continued through the first half of 1980, creating a serious market disruption so far as the Italian industry was concerned. The reference price mechanism that is supposed to reduce imports did not come into effect quickly enough, and in September, 1980 the industry was still complaining about the low prices of imported squid.

It should be noted that Canada played a part in this shift in the Italian market for squid, because much of it came from Canadian waters and into the hands of Eastern Bloc countries through catch allocations and, possibly, over-the-side sales to Fishing vessels from the USSR, Bulgaria and Poland.

What happens in the future will depend on whether Canada maintains the policy of encouraging over-the-side sales, and whether the ban on Italian fishing vessels will continue. Italian consumers are extremely particular about such things as the sauce in which it is prepared. However, semi-processed products seem to find a market. For example, a US west coast producer succeeded in exporting to Italy small-size loligo 5 to 10 pounds, canned whole in water, broth and salt mixture, and the future seems promising.

j) Crab meat

This is a small import item coming mostly from the USSR (top quality canned crab) and from Thailand (lower quality). There may be some further potential in the catering sector, but this is still to be tried and developed.

k) Shrimp

Current consumption of shrimp at around 10 000 tonnes is mainly from Italy's own catch from the Mediterranean and African coasts, which improved slightly in recent years to 7 900 tonnes in 1979. Most of these shrimp are small Pandalus borealis. Imports of fresh/frozen shrimp come from the UK, Denmark, France and Norway. According to Sages-Findus an increasing volume of pre-packed (unpeeled, cooked) products is coming from Norway and Denmark.

l) Salted/dried cod

Since 1977 the growth of imports of dried/salted cod has been more or less steady at 8.5% (cumulative).

In recent years imports have probably accounted for 40 to 45% of total salt/dried cod consumption. This ratio can be expected to increase as domestic production continues to diminish. Thus, although total consumption is expected to remain stable, or decline slightly, imports are expected to grow to some 45 000 tonnes by 1985, from 38 200 tonnes in 1979. (see Table 14).

TABLE 14

Italy: Salted/Dried Codfish Imports

	000 Tonnes			C$ per kilogram		
	1977	1978	1979	1977	1978	1979
Dried/Non-Salted - total	4.6	6.1	5.3	5.74	6.66	8.24
Iceland	0.5	0.6	0.8	4.94	5.09	6.51
Norway	4.1	5.5	4.5	5.84	6.84	8.56
Dried/Salted - total 1/	--	12.2	15.6	--	2.55	2.90
Iceland	--	3.8	7.3	--	2.29	2.64
Faroe Islands	--	0.7	0.2	--	2.23	2.70
Norway	--	4.2	3.2	--	2.76	3.21
Spain	--	1.6	1.5	--	2.50	2.58
Canada	--	1.0	2.0	--	3.06	3.41
Wet Salted - total 1/	28.7	12.5	11.7	--	2.47	2.97
Norway	9.8	5.8	5.6	--	2.68	3.17
Faroe Islands	8.2	4.4	3.3	--	2.24	2.72
Iceland	3.6	1.2	1.0	--	2.21	2.81
Denmark	1.7	0.6	1.4	--	2.42	2.90
W. Germany	--	0.1	0.1	--	2.88	3.22
Canada	0.9	0.11	0.04	--	2.72	2.40
Salted Fillets - total	0.3	3.9	5.6	2.30	2.82	3.48
Norway	0.1	2.9	3.9	2.30	2.92	3.62
Faroe Islands	0.1	0.8	1.0	1.98	2.31	2.65
Denmark/Others	0.1	0.2	0.7	--	--	--
Grand Total	33.6	34.7	38.2	2.66	3.28	3.76

Source: ISTAT

Note: 1C$ = liras: 826 (1977), 743 (1978), 709 (1979).

1/ Wet and dry were combined in 1977.

The product mix of imports is definitely changing: salted fillets are rapidly taking a larger share of the market surpassing the tonnage of non-salted stockfish in 1979. Both products, however, come mostly (77%) from Norway. The shift in the salted cod segment is definitely toward the dry salted cod. The potential for Canadian sales are discussed in Section E.

Iceland increased its supply of dry salted fish substantially in 1979, while Norway's sales although still ranked second, declined. Norway and the Faroe Islands remain the major suppliers of the declining imports of wet salted cod. As Table 14 shows, Canada has a small but growing Italian trade in these products.

D. POTENTIAL TRADE

With the expectation that domestic catch and production, particularly of the preferred species, will decline and that consumption will grow marginally there is no doubt that Italian fish imports will increase through 1985. The average annual increase in the past 4 years was over 10%, but even at 7-8% growth the total could reach well over 460 000 tonnes by 1985, worth C$1 200 millions at the 1979 average value. In fact the average value has increased by over 30% per year in the past 4 years, indicating that even at half that rate of increase Italy's fish imports will be worth over C$ 3 billion by 1985.

Canada could sell much more fish to Italy. In 1980, Italy's total imports of fisheries products amounted to 340 000 tonnes valued at over C$1 Billion. Canada's share was small, only about 3 700 tonnes valued at C$13 million.

A conservative projection of Italy's fish imports through 1985 is as follows:

TABLE 15

Italy: Fish import projections to 1985

	000 Tonnes				
	1977	1978	1979	1980	1985
Fresh/frozen	*	149	169	185	260
Shellfish	*	61	66	75	100
Dried/salted/smoked	38	39	44	48	55
Prepared/canned/others	26	26	31	32	45
Totals	251	275	310	340	460

Source: ISTAT

Canada's opportunities to expand fish exports to Italy will vary according to species and product forms and the key factors will include the Canadian processors' ability to meet quality requirements, guarantee supply, develop new products, and meet product specifications. Other factors include Canada's policy on direct sales and allocations particularly to the Eastern Bloc countries, and on possible allocation/purchase arrangements or even joint-venture agreements with Italy.

TABLE 16

Canadian fish exports to Italy

	tonnes			% change '80	
	1978	1979	1980(E)	Vol.	A. Val.
Salted Cod - total	919	1 600	1 785	12	--
Boneless	4	--	--	--	--
Light, over 43%	87	90	70	-22	34
Light, 43% or less	--	543	550	1	3
Heavy, 46-50%	82	17	25	47	8
Heavy, 44-45%	700	73	650	790	43
Heavy, 43% or less	56	877	490	-44	14
Salmon-frozen, wh.dr. - total	398	1 036	565	-45	--
Chum	41	209	10	-96	12
Coho	101	218	35	-84	-5
Sockeye	N/A	N/A	60	--	--
Spring	227	401	360	-10	0
NES	29	208	100	-52	29
-Canned - total	285	494	408	-17	--
Chum	2	65	0	--	--
Pink	267	364	390	7	15
Sockeye	9	15	18	20	4
NES	7	50	0	--	--
Others - Total	998	1 703	900	-47	--
Squid tubes	*	480	480	0	-54
Squid round	*	800	220	-75	--
Shrimps	*	16	110	587	17
Herring bloaters	14	74	20	-73	-12
Clams, fresh fry	18	37	0	--	--
Mackerel, frozen whole	*	74	0	--	--
Other frozen whole	18	131	20	-85	--
Frozen fillets	18	14	20	43	19
Smoked	25	74	20	-73	-15
Other salted/dried	539	1	5	--	--
Other shellfish	366*	2	5	--	--
Grand Total	2 600	4 833	3 658	-25	-12

(E) Estimates based on Jan-Nov. data.
* Not specified.

Source: STATISTICS CANADA, Exports by Commodity, Ottawa, 1979.

The analysis of Canada's potential is summarized below by major species or product type. The actual export statistics are detailed in Table 16 but following is a summary of past data and what would be our best estimates for 1985:

TABLE 17

Italy: Potential fisheries imports from Canada

	Tonnes			
	1978	1979	1980	1985
Salted Cod	919	1 600	1 785	4 000
Salmon, frozen	398	1 036	565	1 200
Salmon, canned	285	494	408	500
Squid tubes	*	480	480	1 500
Squid round	*	800	220	1 000
Shrimps	*	16	110	200
Others	*	407	90	500
Total	1 602	4 833	3 658	8 900

Source: Tables 11, 13, 14, 15 and 16.

E. EXPORT POTENTIAL BY SPECIES

1. Demersal Species

Canada's exports of frozen groundfish to Italy for the "fresh fish" market do not appear to have any large potential. Major imports by the Italians will likely be tied to the fishing allocations given to the country's distant-water fleet. The fleet owners wish to exercise more control over imports as in other EC nations, but perhaps even more so in Italy because they have an interest in the traditional distribution network, including the institutional market.

Canadian prospects in the quick-frozen food market are more promising particularly in terms of consumer products packed for retail sales. This is a growing segment of the market some 80% of which is controlled by Sages-Findus and the government-controlled Frigodaunia. Both market efficiently with good distribution networks and both are geared for big expectations in the near future. The strategy seems to be to concentrate efforts on marketing and distribution and to leave much of production to their co-packers and finished product suppliers both in Italy and abroad. Currently, Sages-Findus handles 6 000 tonnes of cod blocks for fish fingers, 5 000 tonnes of fish fillets and some 2 000 tonnes of squid per year. The key to this market for Canada is in meeting these companies strict product specifications and the Italian Government's new health regulations.

Both companies view Canada as an important future supplier and are quite open to establishing direct contact with Canadian producers. As transport costs play a significant role, Frigodaunia is also in a position to discuss two-way container traffic, with Canadian fish going to Italy and frozen agricultural products coming into Canada.

a) Salted cod

Imports could increase to 45 000 tonnes through 1985 and this offers excellent opportunities for the Canadian industry, given the expectation that Italy's traditional suppliers (Norway, Iceland, the Faroe Islands and Spain) will be taking smaller catches.

However, prospective Canadian suppliers will have to meet the same quality specifications as are met by the traditional exporters to Italy. The market prefers large, white-wing cod up to 2.5 kilograms, with smoothness of cut, low moisture content, absence of parasites and blood spots. Machine split fish and machine-cut salted fillets are doing well in the Italian market.

Canada thus far has shown an inability to meet preferred specifications, and suffers from a quality image that is not the best. Nonetheless, sales of Canadian heavy salted products have been increasing and there is an especially important market for "Gaspe-cured" cod, which appeals to a select clientele and draws good prices. It was expected that 1980 could see a doubling of Canadian salt cod exports were it not for Canada's other key problem -- the absence of guaranteed supply.

Like the quality issue, the supply problem needs long-term planning and a more serious commitment to long-term marketing. The guaranteed supply factor is extremely important as import restrictions to Italy have been relaxed, which means more smaller importers and distributers could import directly if their inflexibility in building inventory can be met. The more fragmented import structure also implies that establishing close ties with individual importers, however small, could be a good strategy for Canadian exporters.

If Canada can overcome the quality and guarantee of supply problems, there is a potential market for close to 10 000 tonnes of Canadian saltfish in Italy by 1985. But under the circumstances a projection of 4 000 tonnes might be realistic.

b) <u>Fresh and frozen cod</u>

The demand is for small round, headed and gutted, and straight-cut cod. Opportunities are limited for Canada due to the Italian preference for frozen-at-sea products. Cod has to compete in price with hake.

c) <u>Pollock</u>

There is some limited interest for blocks and fillets. Chilean pollock has been preferred because it is free of parasites. For the same reason Canadian Pacific coast pollock may be preferred to the Atlantic pollock.

d) Plaice/sole

There may be a small potential market for Canadian products but there is a problem of giving them a name which will precisely identify them for Italian consumers.

e) Greenland turbot and halibut

The Japanese tried but failed to penetrate the market with IQF fillets, but consumers may eventually overcome their traditional suspicions of new products. In time these species could make inroads. Opportunities may exist for a similar Canadian product, but promotion will be needed.

f) Hake

There is much confusion between cod and hake as both are called "merluzzi" in Italy. Traditionally, Italians prefer hake as it is caught in the Mediterranean and is therefore better known than cod. Frozen hake has a high-volume potential. It is hard-packed, headed and gutted with "straight" cut, in small sizes up to two kilograms, frozon-on-board within four hours, and packed in 20 kilogram cartons. Unknown species usually have limited acceptance but Canadian Pacific hake and the frozen-at-sea North Atlantic silver hake should be tried.

2. Pelagic Species

a) Mackerel

There is a market in Italy for frozen whole mackerel, hand-laid in 10 kilogram cartons (3 x 10 to a master, 4 to 6 pieces per kilogram). Importers have expressed interest in obtaining mackerel from Canada but they require it to be frozen-on-board within four hours of being caught. In 1979 Canada's exports totalled 74 tonnes, but an increased domestic catch and low-priced imports from the East Bloc countries virtually wiped out Canadian sales in 1980.

b) Herring

Canadian exports of 74 tonnes of herring bloaters in 1979 were a big increase from 1978, but consumer acceptance may not have been as great as that afforded to the traditional specialty imports from The Netherlands, France and West Germany. Demand for butterfly fillets and round frozen herring is very limited.

3. Other Fish

a) Salmon

Smoked and canned salmon are high-priced luxury products purchased for special occasions and as such the market potential had been expected to be limited. Yet the total salmon import increased by about 100% monthly in 1979 in the fresh/frozen category. Canada had a major share of the increase, but since then much of it would appear to have been lost to the US.

The potential remains good for Canada through 1985, perhaps well over the record high of more than 1 500 tonnes of frozen and canned products combined in 1979. Frozen salmon remains a major component of Canadian sales to Italy, and it is mainly for smoking. However, consumption of canned salmon has also been increasing in recent years and the Canadian product is well received.

Imports of smoked salmon are also increasing, particularly from The Netherlands, France and Denmark. There has been little interest in Canadian smoked salmon, mainly because the European smoking method is preferred and the packaging has generally been superior. The prospects for marketing smoked salmon from Canada appears limited.

The import duties for salmon products are: 3.8% for fresh/frozen, 13% for smoked and 6.8% for canned.

b) Dogfish

There is a strong demand for this product but the opportunities disappeared because of a recent mercury problem and government regulations that resulted. An analysis of 20 pieces from a shipment of 30 to 50 tonnes must be taken and the results for each piece recorded. A certificate of analysis of mercury content and radio activity must be provided by an approved laboratory.

4. Crustaceans and Molluscs

a) Squid

As shown in Table 13 imports of squid have increased considerably in recent years both for the loligo and illex types. The increase in 1980 seems to have been over 10%. Consumption would appear to be increasing, while the Italian catch appears to be declining.

Canada's entry into the squid market in Italy is fairly recent. In 1979 nearly 8 000 tonnes of Canadian illex were placed on the Italian market by East Bloc countries (USSR, Bulgaria, Poland and Romania). Their "political prices" were low and that created havoc among Italian suppliers. At the same time, however, Canadian exports of nearly 1 300 tonnes also showed that the Canadian illex is an accepted product. The preference has traditionally been given to loligo species and the Italians are not totally aware of the quality products that can come from Canada's inshore fishery, presuming that only on-board frozen products are acceptable.

Canada's potential will depend upon the Canadian fisheries policy concerning squid-fishing quotas for the East Bloc countries. This factor, if resolved, could result in a market of over 5 000 tonnes per year. The market potential could be reduced if Italy's bilateral agreements with the US materialize as expected.

A projection of 4 000 tonnes of round-weight equivalent as Canada's export to Italy by 1985 is not unrealistic. The existing reference price (797 ECU/tonne) on frozen illex and the EC customs duty of 8% (loligo and ommastrephes have 6%) should not be a major problem.

b) Shrimp and prawns

Canadian exports of shrimp and prawns increased from 16 tonnes in 1979 to over 110 tonnes in 1980. They seem to be making an impact in the catering trade. Opportunities also exist in the quick-frozen retail trade, where, according to Sages-Findus, there will be a growing market for pre-packed, cooked and unpeeled products, which now come mostly from Norway and Denmark. Sages-Findus has expressed strong interest in Canadian products.

c) Crab

There exists a limited demand for canned crab in Italy. Canadian canned snow crab occupies a position somewhere between the high-quality and high-priced Russian products and the low-quality products from Thailand, Taiwan and Japan. Frozen crab is virtually unused, but some possibilities exist for the catering trade.

F. CONCLUSIONS

1. Like many European fishing nations, Italy is faced with a declining domestic catch and an inreasing reliance on imports to meet market demands.

2. According to the UN Food and Agriculture Organization (FAO) per capita consumption in 1978 was 12.5 kilograms, or roughly equivalent to 710 000 tonnes live weight. By Western European standards, consumption is considered moderate. Fish accounts for about 8% of the total "animal" protein in the Italian diet, and its role is mainly to add variety.

3. A word of warning: official statistics on both consumption and domestic catch may well be inaccurate or misleading. In 1979, for example, the Italian catch was estimated at just under 400 000 tonnes. But some authorities say a more realistic figure would be more than 700 000 tonnes. They believe the official figures seriously underestimate the catch of coastal pelagic species and molluscs, which often go through markets that are not officially sanctioned. If this is the case, then consumption figures as well would be under-estimated.

4. Projections of consumption growth through 1985 are moderate, assuming a population increase to 59 million (up 4% from 1978). Increased consumption could be generated by higher personal incomes, improvements in the distribution system for fresh fish, and product development and promotion. FAO predits per capita consumption of 14.2 kilograms by 1985, but persistent increases in fish prices, among other factors, may make this overly optimistic.

5. Italian consumers are reticent about trying unfamiliar products. Their preference runs to fresh products caught from the Mediterranean. Nonetheless, it is anticipated that consumption of frozen fish, though still quite small, will show the greatest growth.

6. Italian fish imports for 1979 are estimated at 310 000 tonnes, valued at C$804 million. It is expected that by 1985 imports could reach 460 000 tonnes, and the value could be as high as C$3 billion.

7. The Italian situation offers enormous potential for Canadian suppliers, but the fact is that Canada has been less than successful in exploiting those opportunities that already exist. For example, it is estimated that Canadian exports to Italy amounted to no more than 3 700 tonnes worth around C$13 million in 1980, whereas Italy's total imports were probably in the order of 340 000 tonnes worth more than $1 billion.

8. Canadian opportunities to expand sales to Italy will vary according to species and product forms and the key factors will include the ability of processors to meet quality standards and product specifications, guarantee supply and develop new product forms. Other factors include Canadian policy on direct sales and allocations, particularly to Eastern Bloc countries, and on possible allocation/purchase arrangements or joint-venture agreements with Italy.

9. Italian imports of salted cod could reach 45 000 tonnes by 1985, and herein lie excellent opportunities for Canadian processors, since the traditional suppliers -- Norway, Iceland, Faroe Islands and Spain -- are encountering supply problems. Once again, however, prospective Canadian suppliers will have to meet the quality standards to which the Italian market has become accustomed. Quality standards and the inability to guarantee supply continue to frustrate Canadian efforts to penetrate the market. Long-term planning and a serious commitment to long-term marketing would appear to be in order. If Canada can overcome the quality and supply problems, there is a potential market for nearly 10 000 tonnes of saltfish by 1985.

10. There is good potential for continuing sales of Canadian salmon to Italy. Frozen salmon is an important item, especially for smoking to local specifications. At the same time, consumption of canned salmon is increasing and the Canadian product is well received.

11. Italy's imports of squid have increased significantly, and Canadian sales could reach 4 000 tonnes round-weight equivalent by 1985. Much will depend on Canadian fisheries policy as it applies to squid-fishing quotas for East Bloc countries. There was considerable disruption of the market in 1979 when 8 000 tonnes of Canadian squid (illex) were sold in Italy at

artificially low prices by Communist countries. The Italian preference is for the loligo species, but sales of nearly 1 300 tonnes of illex by Canadian suppliers indicate it is an acceptable product that shows promise.

12. Canadian exports of frozen groundfish appear to have little potential. Any major imports will probably be tied to fishing allocations given to the country's distant-water fleet. The fleet owners want more control over imports to go along with their interest in distribution networks.

13. There are more promising prospects for Canada in the quick-frozen food market, particularly in consumer products packed for retail sales. This is a growing segment of the market, some 80% of it controlled by two companies -- Sages-Findus and the government-controlled Frigodaunia. The key to this market for Canada is in meeting the strict product specifications of these companies and the Italian government's new health regulations.

14. Both of the companies named above consider Canada an important future supplier and are open to establishing direct contact. Since transportation costs are a major factor, Frigodaunia is interested in discussing two-way container traffic, with Canadian fish going to Italy and frozen agricultural products coming back to Canada.

APPENDICES

APPENDIX I

NOTES ON FISH EXPORTS TO ITALY[1]

The following information is provided to assist firms interested in exporting fish and fish products to Italy. The various requirements indicated below are subject to revision, however, and the exporter is urged to check and clarify all items carefully with his prospective Italian buyer. The following also apply to shipment of small samples:

Certification

All fish and fish products must be accompanied by a Mercury Certificate attesting that the mercury content does not exceed 0.7 ppm.

Although seldom strictly enforced, it is still required that certain fish and fish products originating from Pacific waters be accompanied by a Radioactivity Certificate.

With the exception of live fish (e.g. eels, lobster) and certain fresh/frozen whole or sectioned large species (e.g. tuna, shark), all fish and fish products must be accompanied by a Health Certificate, specifically defining the nature of the product and attesting that it was produced in an establishment in compliance with Fish Inspection Regulations. Processed frozen fish products in consumer packs and those destined for simple re-packing by Italian quick-frozen food manufacturers (and including those possibly destined for other purposes but which because of their manner of presentation, may easily be mistaken for the latter) must be accompanied by a special Quick-Frozen Produce Health Certificate[2]. Health certificates for edible molluscs must state that they have been raised in suitably controlled nurseries or from natural banks located in waters deemed suitable from a hygienic-health standpoint.

With the exception of the ordinary Certificate of Origin, which is normally issued by the exporter's local Board of Trade or Chamber of Commerce, all the above certificates must be issued by the Federal Fisheries Inspection Service.

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1) Prepared by M. McDermott, Commercial Officer, Rome, May, 1980.

2) At present Canadian firms are not yet permitted to export "quick-frozen" products to Italy.

Additives

Italian legislation permits only very limited use of chemical preservatives or colourings. Any additives utilized should be checked ahead of time with the importer to determine whether they are permitted by Italian law, and must be indicated on the label.

Labels

All products must be properly labelled, preferably but not necessarily in Italian, with clear indication of the following information:

a) denomination of product;
b) name, title or trademark of producer firm;
c) address (city) of firm's head office;
d) address (city) of production plant;
e) net weight at origin (in grams or kilograms);
f) date of packing (if in code, key must be communicated to Ministry of Health).

In the case of prepared products the label must also indicate all ingredients in descending order of quantities present.

In the case of "quick-frozen" products the denomination of the product must be preceded or followed by the term "quick-frozen" (English), "surgelé" (French) or "surgelato" (Italian), and, if these be packaged for direct sale to consumers, the label should also indicate instructions for conservation and use of the product.

Customs Duties and Surtaxes

Customs duties vary considerably depending upon the species, the degree of processing, the specific country of origin and in some cases the season of the year. In the case of certain species the EC has fixed reference prices, and products presented at the border at prices below these levels will be charged a surtax equivalent to the difference between the CIF value and the community reference price.

APPENDIX II

QUICK FROZEN PRODUCE HEALTH CERTIFICATE

Series........ No.......

Country of origin...

Ministry..

Service...

I - Identification of Merchandise

Type: (Vegetable products, meat products, fish products, bakery or pasta products, dairy products, pastry products, dietetic products, prepared and/or pre-cooked foods of animal or vegetable origin).........

....

Type of packaging: (cartons, sacks, etc.)...........................

Number of parcels:..

Net weight:...

II - Origin of Merchandise

Name and address of producing firm:.................................

Address of producing plant:...

Date of shipment:...

III - Destination of Merchandise

Consignee firm:...

Place of destination:...

Means of transport:...

IV - Health Information

It is certified that the food products here indicated..................

....

correspond completely to the regulations in force in Italy.

Specifically it is certified that the food products:

1) Have been obtained using wholesome raw materials, in good sanitary conditions, in a state of natural freshness;

2) Have been submitted, in establishments considered and declared to be suitable, under functional and sanitary-health aspects, for rapid deep-freezing processing in such fashion that at every point within them a temperature of at least -18°C below zero has been reached within a time period of no more than four hours;
3) Do not contain any additional products (additives, colourings, etc.) except those indicated in the note below;(x)
4) Have been prepared, handled, packed and conserved in conformity with the dispositions in force in Italy;
5) Have been submitted to the necessary chemical, microbiological, bio-toxological controls to ascertain their sanitary-health suitability;
6) Will be shipped by authorized refrigerated vehicles and capable of maintaining them at a temperature of at least -18°C below zero.

(x) Note: the presence of additives and/or colouring agents in quick-frozen prepared and/or pre-cooked foods is referred to the raw materials used, in which the use of these is permitted under Italian law.

Done at.................................... Date.....................

Official Stamp

Official Service Inspector

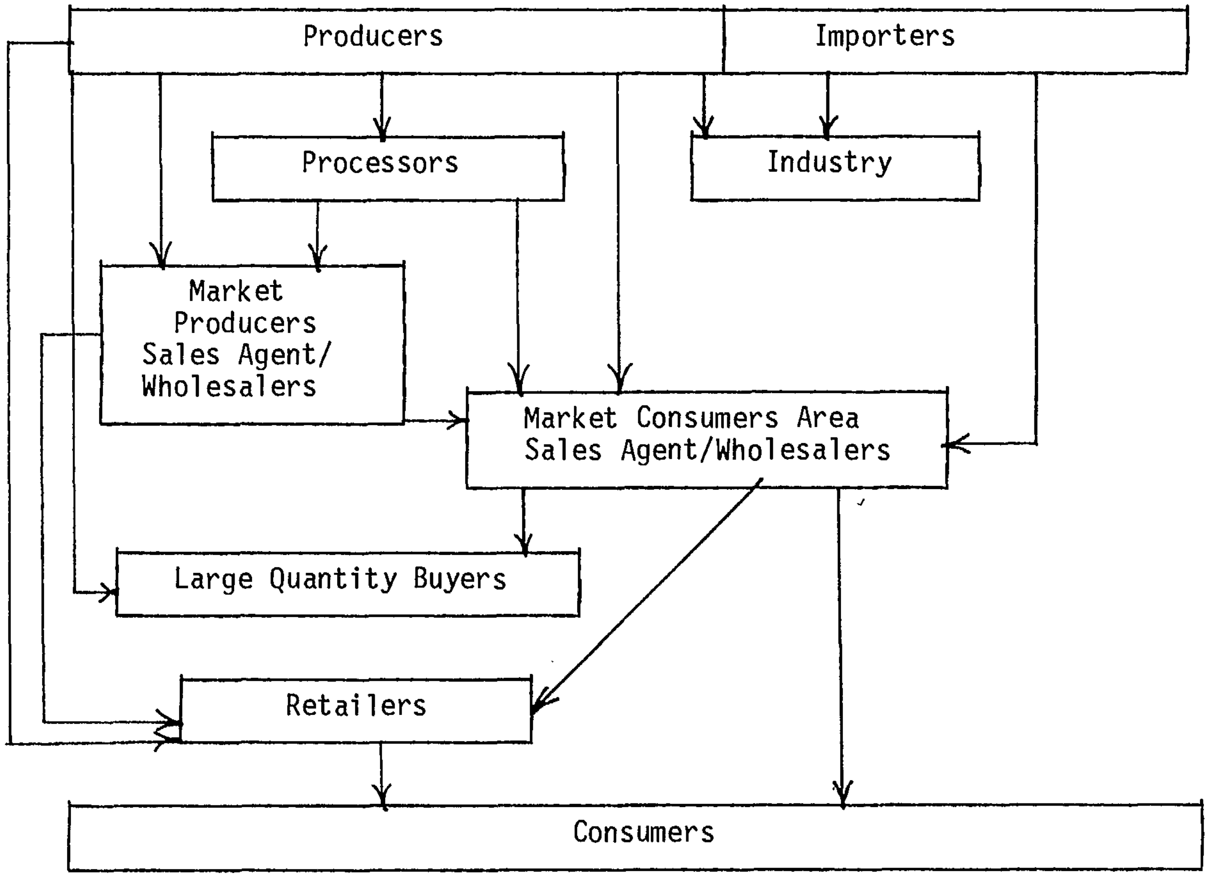
....

Signature

....

APPENDIX III

MARKETING CHANNELS FOR FRESH FISH IN ITALY



Source: Worldwide Fisheries Marketing Study: Italy, Phase I, 1979. Page 33.

APPENDIX IV

SAGES-FINDUS PRODUCT SPECS - 23 OCTOBER 1980

1) QUICK-FROZEN WHOLE SQUID - TODARODES SAGITTATUS
ILLEX ILLECEBROSUS

PACKING: 20 KG CARTONS (APPROX.), WITH PRODUCT QUICK-FROZEN IN ONE OR MORE LAYERS.

SIZES: TUBE LENGTH FROM 110 MM MINIMUM TO 220 MM MAXIMUM, TENTACLE DIAMETER AT POINT OF ATTACHMENT TO HEAD SHOULD NOT EXCEED 10 MM.

COLOUR, ODOUR, TASTE: WHITE FLESH, SKIN SPECKLED BRICK RED. TYPICAL SQUID ODOUR WITHOUT STRANGE AMMONIA-TYPE SMELL. AFTER COOKING PRODUCT SHOULD HAVE FIRM AND ELASTIC TEXTURE WITHOUT BITTER OR ACID AFTERTASTE.

NO CHEMICAL ADDITIVES.

2) QUICK-FROZEN WHOLE RAW SHRIMP - PANDALUS BOREALIS

PACKING: IN 5 KG CARTONS, WITH PRODUCT EASILY SEPARABLE IN SINGLE UNITS.

SIZES: 90/120 PIECES PER KG. (WITHOUT EGGS).

COLOUR: REDDISH-PINK SHELL TYPICAL OF PRODUCT, WITHOUT DARKISH, OXIDATED DEHYDRATED SPOTS OR ZONES OR ALTERED IN ANY WAY.

ODOUR: CHARACTERISTIC OF SPECIES, WITHOUT ABNORMAL ODOURS.

TASTE AND TEXTURE: TYPICAL OF SPECIES WITHOUT BITTER ACID OR AMMONIA-LIKE AFTERTASTE, FLESH FIRM AND ELASTIC. NET TOUGH.

NO CHEMICAL ADDITIVES.

3) QUICK-FROZEN COD BLOCKS

BLOCK SIZE: BLOCK DIMENSIONS 479 x 252 x 63½ MM. WEIGHING 7½ KG (16½ LBS).

FILLET SIZE: WHOLE FILLETS OF COD WITHOUT SKIN AND WITHOUT BONES. MINIMUM FILLET WEIGHT OF 80 GR FOR AT LEAST 95 PERCENT OF BLOCK. ABSENCE OF SMALL FILLET PIECES OF BELOW 30 GR. ABSENCE OF AIR BUBBLES, FOREIGN BODIES OR CHEMICAL ADDITIVES.

BONES: MAXIMUM TOLERANCE OF 4 BONES OR PIECES OF BONE IN 4 KG OF PRODUCT.

SKIN: MAXIMUM TOLERANCE OF 1 CM^2 OF SKIN IN 4 KG OF PRODUCT.

COLOUR: NATURAL WHITE COLOUR OF SPECIES.

ODOUR AND TASTE: FRAGRENT, CHARACTERISTIC OF PRODUCT, SUCCULENT, NOT TOUGH.

APPENDIX V

LIST OF ITALIAN FISH IMPORTERS
(OCT. 1980)

FROZEN SALMON IMPORTERS

VISMARA di A. BIFFI E.C. S.A.S.
Via Carlo Pisacane, 22
20129 - MILANO
Telex: 320277 BIALVI I

WAX & VITALE S.P.A.
Via Brigata Bisagno, 10
16129 - GENOVA
Telex: 270459 WAXVIT I

INTERNATIONAL SALMON CO. S.P.A.
Via per Cassano
21052 - BUSTO ARSIZIO
Telex: 330574 PELLIN I

LA PIEMONTESE S.N.C.
Via Levis, 40
10050 - CHIOMONTE
Telex: 210322 SCOTIA I

SCANDINAVIAN SALMON SMOKEHOUSE S.N.C.
Via della Forestale, 48
23017 - MORBEGNO

LA CORTE DI JOHN RAE S.N.C.
Vigna La Corte
00026 - LICENZA

ITTIMPORT S.P.A.
Via Sammartini, 12
20100 - MILANO
Telex: 380010 ITTIMP I

NORDIMPORT S.P.A.
Via San Marco, 44
20099 - SESTO SAN GIOVANNI (Milano)

ETRURIA S.P.A.
Piazza Bertarelli, 2
20122 - MILANO
Telex: 334057 FIBEN I

IMPORTSALMON S.P.A.
Via Marostica, 40
20146 - MILANO
Telex: 331094 SORBAG I

F.A.R.O. PESCA S.A.S.
Via Aldobrandini, 3/r
00056 - LIDO DI OSTIA
Telex: 611194 FAROFI I

Ditta DOMENICO ALOIA
Via Antonio Mancini, 42
80127 - NAPOLI
Telex: 710537 ALOIA I

FORMIA FREEZING FISH S.P.A.
Piazzale Vespucci
04023 - FORMIA
Telex: 680028 FORMIA I

SI. PRO. MAR S.P.A.
Viale G. Mazzini, 146
00195 - ROMA
Telex: 614571 SIRPOM I

ITTIRUSSO S.R.L.
Via Melitiello
80025 - CASANDRINO (Napoli)
Telex: 710383 ITR O

I.L.I.O. S.P.A.
Strada Mediana Km. 7,700
04100 - BORGO GRAPPA
Telex: 680062 ILIO I

FIROM S.R.L.
Mercato Ittico
Tronchetto
30123 - VENEZIA
Telex: 410187 FIROM I

(*) Smoker

APPENDIX V (Cont'd)

DRIED, SALTED, SMOKED FISH IMPORTERS AND DEALERS

	TELEX
GADUS S.R.L., Via Flaminia 441, 00196 ROMA	
C.P.L. Imperial S.P.A., Via Tiburtina 465,65100 PESCARA	600021
ROMEXPORT S.N.C., Via G. Caselli 34, 00149 ROMA	610436
DE NICOLO' & C. S.N.C., Via Yser 8, 00198 ROMA	
ALCO S.P.A., Via Mazzarino 6, 00153 ROMA	
D & C Bologna, S.P.A., Via Parigi 13,40121 BOLOGNA	510534
DE LANGLADE e GRANCELLI S.P.A.' Via Cairoli 6, 16124 GENOVA	
DIANA S.P.A., Via Buranello 85r, 16149 S. PIER D'ARENA (GE)	
GAROSCI VEGE' S.P.A., Via Cacciatori 111, 10042 NICHELINO	
ICAT IMPORT COMM. ALIM. TEGLIO, Via Cairoli 11, 16124 GENOVA	
IGINO MAZZOLA S.P.A., Piazza Nunziata 5,16124 GENOVA	
NOVAFISH S.P.A., Via Gramsci 29/5,16126 GENOVA	
MARIO PONTECORBOLI, Via Gramsci 3/7,16126 GENOVA	
HERRING IMPORTS S.P.A., Piazza Nunziata 5,16124 GENOVA	
I.L.I.O. S.P.A., Strada Mediana km 7,700,04010 BORGO GRAPPA (Lt)	
IMPORTSALMON S.D.F., Via Marostica 40,20146 MILANO	
INTERNATIONAL SALMON COMPANY S.P.A., Via Novara 48,21052 BUSTO ARSIZIO(Va)	
WAX & VITALE, Via Brigata Bisagno 10, 16129 GENOVA	
ITTIRUSSO S.R.L., Via Traccia a Poggioreale, 80100 NAPOLI	
NUOVA PANAPESCA S.R.L., Via Mazzini(Traversagna) 51010 MASS COZZILLE (Pt)	
DITTA CRESCENZIO VENTO, Via Labicana 75,00187 ROMA	680207
DITTA GIOVANNI SPAZIANI & FIGLI, Via Casilina Nord 209,03100 FROSINONE	
PIETRO SIGNORELLI, Piazzale Clodio 8,00195 ROMA	
Figli RAVIGNANT fu MENOTTI, Via Sergio I,32,00165 ROMA	
ANTONIO LISTA, Via Torri La Felce 12,04100 LATINA	
MASSIMO IZZI, Via Damiano Chiesa, 04022 FONDI (Lt)	
FRANCESCO CIPRIANI, Via Tiburtina Valeria km 35, 00019 TIVOLI (Roma)	

APPENDIX V (Cont'd)

SALTED CODFISH IMPORTERS AND AGENTS

Members of ANIPESCA (National Preserved Fish Importers Association)

Albacora
Via Brignole de Ferrari 11/8
16125 GENOVA

Ditta Aloia Pasquale
89013 GIOIA TAURO (Reggio Calabria)

Ditta Giovanni Battaglia
Via Venezia 5
80124 NAPOLI

Ditta Burgassi S.P.A.
Pizza Peruzzi 2
50122 FIRENZE

Canada's Pesca S.P.A.
Vile Tunisia 38
20124 MILANO

CO.BA.SA. Snc
Via Duca Ferrante della Marra 14
80136 NAPOLI

Codimport S.N.C.
Casella Postale 3004
16100 GENOVA

Fish Import S.P.A.
Calata Villa del Popolo
Palazzina Pontecorboli
80133 NAPOLI
Telex: 710445

De Benedetti & Co.
16126 GENOVA

Ditta Esposito Francesco
Via Caraviglios 33
80125 NAPOLI

Ditta G. Tommasso Fabbrini & C
Via Fium 30
57100 LIVORNO

Ditta Foods Import
F.Illi Monti
64010 VILLA ROSA (TE)

Ditta Gadus S.R.L.
Via Flaminia 441
00196 ROMA

Ditta Enrico Gismondi & C.
Via Gramsci 7/3
16126 GENOVA

Ditta ICAT
Import.Commercio Aliment.Teglio S.P.A.
Via Cairoli 11
16124 GENOVA

*Ditta. C.P.L. Imperial S.P.A.
Via Tiburtina Valeria
65100 PESCARA
Telex: 600021

*Mazzola Igino
Piazza Nunziata 5/12-Palazzo Lauro
16124 GENOVA

Novafish S.P.A.
Via A. Gramsci 29/5
16126 GENOVA

*A. Pontecorboli-Eminente
Arenili del Porto
Ex Villa del Popolo
80133 NAPOLI
Telex: 710445

Vincenzo Sannino fu G. & Figli S.N.C.
Casella Postale 92
80100 NAPOLI

S.A.R.C.E.N.
Via G. Cesare Capaccio 2/12 C
80142 NAPOLI

Scambi Internazionali Gianelli
Via A. Doria 15
10123 TORINO

(*Larger firms)

APPENDIX V (Cont'd)

Ditta Stella Nicola
Via Pietrasanta 12
20141 MILANO

Sud Fish S.P.A.
D.C.V. Paonessa & C.
Via Mario Greco 174
88100 CATANZARO

Ditta Raimondo Torre
Via Leonardo da Vinci 69
80055 PORTICI (NA)

Pesca Import S.R.L.
F.illi Imparato
Via Brecce a S. Erasmo 73
80146 NAPOLI

Independent firms in Rome and Southern Italy

Ditta Crescenzio Vento
Via Labicana 75
00187 ROMA
Telex: 680207

Romexport S.N.C.
Via G. Caselli 34
00149 ROMA
Telex: 610436

Alco S.P.A.
Via Mazzarino 6
00153 ROMA

Ditta Ruffo Import
Via Barberini 86/12
00100 ROMA

Ditta Domenico Aloia
Via Antonio Mancini 42
80127 NAPOLI
Telex: 710537 ALOIA

APPENDIX V (Cont'd)

FROZEN FISH

FIROM S.r.l.
Mercato Ittico
30100 VENEZIA
Tel. (041) 27265
Telex: 410187 FIROM
(all types)

ANGELO FROLLANO
Piazza Stefano Jacini 14/15
00191 ROMA
Tel. (06) 34270936
(lobster, salmon)

GRIFOGEL di GRIFONI Giuseppe e C.
S.a.s.
Via del Maggiolino 61
00155 ROMA
Tel. (06) 220507
(cod, sole, squid)

F.A.R.O. Pesca di Bazzali Renzo e C
Via degli Aldobrandini 3/R
00056 LIDO DI OSTIA (Roma)
Tel. (06) 6695895
Telex: 620194 FAROFI
(eels)

DI RUSSO ANGELO CUSTODE
Large Paone 10
04023 FORMIA (Latina)
Tel. (0771) 21622
(lobster, shrimp)

SAGITTARIO S.p.A.
Via della Magliana 724
00148 ROMA
Tel. (06) 5221761
Telex: 613012 BKAROM
(all types)

ROMEXPORT S.n.c. di Giuseppe Landi
& C.
Via Giovanni Caselli 34
00149 ROMA
Te. (06) 5578244
Telex: 610436 ROMEX
(all, esp. squid, cod, hake)

NUOVA PANAPESCA S.r.l.
Via Mazzini (Traversagna)
51010 MASSA COZZILE (Pistoia)

Ditta DOMENICO ALOIA
Via Antonio Mancini 42
80127 NAPOLI
Tel. (081) 361521
Telex: 710537 ALOIA
(all types)

TONTINI PESCA S.r.l.
Via della Cannuccia
00042 ANZIO (Roma)
Tel. (06) 985267-9830901
Telex: TONTINI 611442
Att. Sig. Renato Tontini
(all types)

FRIGODAUNIA S.p.A.
Via Leopoldo Serra 32
00153 ROMA
Tel. (06) 585122
Telex: 630579 CIDAC
(fillets of cod and hake)

I.L.I.O.S.p.A.
Via Medina km 7,700
04100 BORGO GRAPPA (Latina)
Tel. (0773) 250008
Telx: 680062 ILIO
(eels, mackerel)

SAGES S.p.A.
Via G. Casalinuovo 8
00142 ROMA
Tel. (06) 54491
Telex: 610260 SAGES
(all types)

FORMIA FREEZING FISH S.p.A.
Piazzale Vespucci
04023 FORMIA (Latina)
Tel. (0771) 22035
Telex: 680028 FORMIA
(all, esp. salmon, squid, hake)

APPENDIX V (Cont'd)

ITTIRUSSO S.r.l.
Via Melitiello
80025 CASANDRINO (Napoli)
Tel. (081) 8311344
Telex: 710383 ITR

ITALGEL S.p.A.
P.O. Box 55
91026 MAZARA DEL VALLO
Tel. (0923) 942256
Telex: 720576 ITAGEL

DI.A.S. S.r.l.
Via Adua 36
04100 LATINA
Tel. (0773) 489851
Telex: 680091 DIAS LT

Matteo GIACALONE & C.
Via S. Botticelli 25
91026 MAZARA DEL VALLO
Tel. (0923) 945603
Telex: 720613 SURGIT

CIPIM S.r.l.
Via Lungomazaro 18
91026 MAZARA DEL VALLO
Tel. (0923) 941657

Stella d'Oriente S.p.A.
Km. 46, S.S. 113
91026 MAZARA DEL VALLO
Tel. (0923) 947006

MERIPESCA S.r.l.
Via Napoli 200
80018 MUGNANO DI NAPOLI
Tel. (081) 7451113

AMO PESCA S.r.l.
Via S. d'Aquisto 28
80018 MUGNANO DI NAPOLI
Tel. (081) 7453338

Atlantide S.r.l.
Contrada S. Vincenzo
63039 S. BENEDETTO DEL TRONTO
Tel. (0735) 60315

TONTINI FRIGO SUD S.p.A.
Strada delle 5 Miglia 84-86
00042 ANZIO

De Filippi Giancarlo
Via A. Cruto 22-24
00146 ROMA

Ialongo Fernando
Via A. Mancini 37
00149 ROMA
Tel. (06) 5272724

ILCAS S.r.l.
S.S. Nettunense km 7,347
00040 CECCHINA (Roma)
Tel. (06) 9340295

Industria Surgelati Ittici S.r.l.
Via Pompeo Magno 1
00192 ROMA
Tel. (06) 353311

ITALGELA S.r.l.
Via Tagliamento 23
63039 S. BENEDETTO DEL TRONTO
Tel. (0735) 5809518

Nizzi Romualdo S.p.A.
06081 CAPODACQUA D'ASSISI (PG)
Tel. (075) 814129
Telex: 660093

Ditta Serrati Giacomo
Via E. Fermi 132
00146 ROMA

Sikelia S.p.a.
III Strada, Ang. XI
Zona Industriale
95121 CATANIA
Tel. (095) 591334