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Fishery market developments



**FISHERY MARKET
DEVELOPMENTS**

**COMMERCIALISATION DES
PRODUITS DE LA PÊCHE**



FMD No.4

February 1984

PRODUCT DEVELOPMENT
& MARKETING
IN NORWAY
1983
INCLUDING A STOCK FISH MARKET
REVIEW FOR THE PERIOD
JANUARY TO NOVEMBER
1983

Prepared by

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Aussi disponible

en français

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Canada

With the cut-off of stockfish exports to Nigeria in April 1982, Norway was faced with a need for product and market diversification to absorb its catch of cod and particularly pollock. Their success and how it was achieved may be useful to Canadian processors and marketers.

As of the first 9 months of 1983 Norway broke new export records of NKR2 billion (\$331,200,000 Canadian). NKR556 million (\$9,207,360) of the total, was fresh fish; at 36,000,000t, up 55% over the same period in 1982. However 12,400t of that was pollock that went to the Soviet Union "over-the-side". Nevertheless fresh fish exports were up 39% with pollock up 5,400t or 25% over 1982. Total fresh fish, round frozen fish and shellfish reached 63,000t, up 73.5% in tonnage with an FOB value of NKR1.4 billion (\$231 million) most of which came from salmon and shrimp.

Shrimp

Shrimp exports were 18,000t for the 1st three quarters of 1983 of which 80% were peeled. Prime markets were Great Britain and Sweden but the U.S. market was opening fast with some 4,000 tonnes minimum expected to be sold there by year's end.

Salmon

Of the farmed fresh salmon, 11,000t were sold by August and 15,000t expected for the year. Much was shipped by air, and mostly to the USA but also to Japan, Hong Kong, Singapore & Thailand. The goal is 26,000-27,000t/per year plus 15,000t of trout.

Cod & Haddock

Fresh cod and Haddock exports were up 3,300t or 50% over same period 1982.

Ocean Perch

Whole Redfish and Redfish fillet exports increased by 28% to 3,250t with fresh Norwegian redfish now going to 10 countries.

Squid

Squid exports volume is up to 5,000t, and going to 15 countries.

Five people are now employed full time in the Aalesund office of the Export Committee for fresh fish which works with Norwegian Export Council and export representatives abroad; much of the office's work is issuing export licences.

How the above scenario carried through to the market can be seen in the following report based on Frionor's 1982/83 Annual Report.

Frionor Hits Sales Record

For the fiscal year 1982/1983 Frionor Norwegian Frozen Fish (cooperative) showed a profit of NKR18 million (C\$2,980,000); sales of 98,500t of deep frozen products were valued at NKR1.6 billion (C\$264,960,000). Tonnage was up 11.6% over the previous year with value up 22.6%; NKR1.3 billion came from foreign sales.

Products

Cod fillets sales were up 42% over 1981/82 but haddock fillets fell by 47% mainly due to poor catches and new mesh size regulations. Large cold storage inventories were mostly of Pollock due to difficulties with stockfish and saltfish markets. Redfish sales were down 20% and turbot down 30%. Mackerel production, in spite of good markets, declined 48% due to difficulties in obtaining raw material at competitive prices. Production of Capelin roe was up 63%. On the other hand cod roe sales were down 63% due to difficult marketing conditions. Shrimp production tripled thanks to large landings.

Markets & Sales

Marketing adjustments had to be made to cope with the large increase in pollock products. This resulted in falling prices for pollock both in the USA and in Europe. The increase in cod products did not result in expected corresponding price reductions in the market because expected increases in offers from Iceland and Canada did not materialize.

The USA took 30% of Frionor's products. The EFTA trade was up 8%, especially to Austria & Sweden in spite of Swedish currency devaluation.

Sales to the Comecon countries were up 5 times over 1981/82 but mainly of pollock.

Exchange Rates

Inflation & costs are still higher in Norway than in most other industrialized countries.

Several foreign currencies were revalued:

Sweden	devalued	16%	in October 1982
Iceland	"	14.3%	in August 1982
"	"	9%	in January 1983
Norway	"	3%	in August 1982
"	"	3%	in September 1982

Product Development

This received much attention due to in-market competition and changing market requirements. This meant new processing methods and new technology which made it possible to simplify production technology and packaging for some products.

An experimental fishery for American plaice was started (no results mentioned) and processing and marketing of fresh fish in controlled atmosphere consumer packs began as well as development of squid-based products.

New Frionor products to be introduced in late 1983 in Norway is Fish au Gratin with macaroni, a product containing cheese and egg in addition to the traditional ingredients.

Norways Stockfish Exports January - November 1983

While Canadian producers temporarily dropped out of stockfish production following difficulties in Nigeria, Norway continues to market large quantities of stockfish to world-wide markets. Here is the most up-to-date report.

Norway exported a total of 39,883 (45kg) bales (1,795t) of stockfish in November, two thirds of which (24,048 bales) went to Nigeria. Total value was \$12,596,186 of which Nigeria represented C\$7,147,791. Italy, top of the quality market, took C\$3,592,171 worth (8,917 Bales) at prices in the \$6.34 - \$9.21/kg range. The Cameroon, another regular customer took only 378 bales in November but Yugoslavia made a large purchase, its first for 1983, of 778 Bales (35 tonnes) of Finnmark Cod, usually preferred after the Lofoten type, at a medium price of \$6.65/kg.

Norway appears to have solved some of its inventory problems by donating stockfish as food aid to Ghana, Mozambique and Mauritania. While no "sales" went to Mozambique in November, Ghana got 130 Bales worth \$25,798 and Mauritania 88 tonnes (1,962 Bales) worth \$389,358. The price per bale to both Ghana and Mauritania was \$198.45 per bale for all species or (\$4.41 kg or \$1.98/lb), suggesting the food aid approach. It is not certain whether the 220 Bales went to Senegal was also aid but the price per bale was the same.

A number of European countries are steady customers, buying consistently but in smaller quantities, suggesting that Canadian producers who market other fish products could add stockfish to broaden product mix.

Denmark, Sweden, West Germany, Switzerland, Holland, France and Belgium are habitually represented as buyers.

Sweden, the largest European buyer in November turns much of its stockfish imports into expensive dogfood. However the prices paid in November, ranging from \$7.75/kg to \$10.52/kg, suggest human consumption.

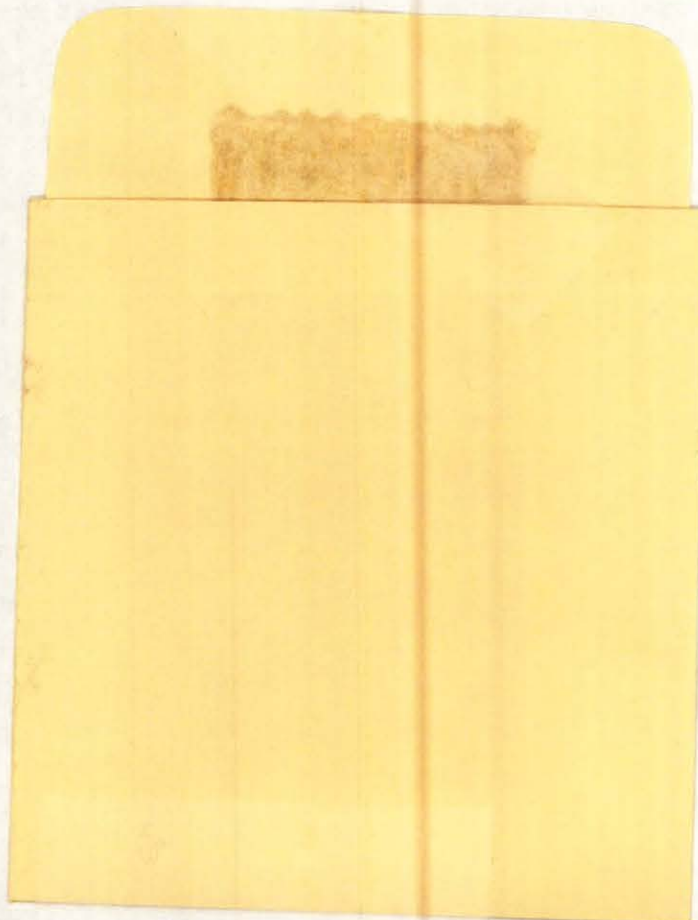
Yugoslavia buys protein (stockfish is 73% protein), and price, and is not a regular customer.

West Germany took quarter of a million dollars worth of stockfish in November (28 tonnes) at prices ranging from \$5.46/kg for Round Saithe to \$8.78/kg for split cod. Canada and the USA are constant customers for Norwegian stockfish, usually Finnmark or Lofoten types, but the USA has bought a range of species, although all at high prices.

In November Canada took a ton of Lofoten Cod at \$472.73 a bale or \$10.40/kg. FOB and suggests possibilities for import replacement by product from Canadian producers.

The USA in November took only split cod, 1.3 tonnes at \$389.70/Bale or \$8.66/kg. However the January to November total was 11 tonnes. In the same period Canadians imported 11.7 tonnes. Both countries pay consistently high prices and, of course must also absorb freight costs from Norway; a factor that should give Canadian products a good price edge.

Norway is continually hunting new markets. For November first-time sales in 1983 included Yugoslavia, Sweden (for split cod), Mauritania (probably aid), Sweden (for Lofoten cod), Belgium (for other round cod), Senegal (probably aid) and Liberia (a market test, half a bale). Other market tests have been to Chile and New Zealand (Australia is a regular if small customer).



Norwegian Stockfish Exports Jan.-Nov., 1983

By Species

Species	Shipped to	Nov.	Price/kg	Jan.-	Value C\$ November
		Qty/kg	C\$@ .1656	Nov. Qty/kg	
CUSK	UK	1,575	5.89	8,010	1,422,304
	Cameroon	16,200	5.74	35,100	
	Nigeria	180,000	7.33	1,742,130	
		<u>197,775</u>	-	<u>1,785,240</u>	
HADDOCK	Ghana	5,850	4.41	37,575	157,413
	Mauritania	4,050	4.41	4,050*	
	Nigeria	20,250	5.61	218,610	
		<u>30,150</u>	-	<u>260,235</u>	
SPLIT COD	Denmark	455	2.15	2,364	747,186
	Finland	7,050	8.61	18,150	
	Sweden	4,200	8.65	4,200*	
	Belgium	400	7.24	500	
	France	1,000	6.61	2,250	
	Netherlands	310	2.31	930	
	W. Germany	2,100	8.78	2,725	
	Cameroon	2,700	5.74	59,445	
	Nigeria	81,000	7.32	83,700	
	USA	1,350	8.66	11,210	
		<u>100,565</u>	-	<u>185,474</u>	
FINNMARK COD	Belgium	500	7.55	1,500	567,576
	France	2,400	6.71	14,400	
	Italy	34,900	6.34	432,600	
	Yugoslavia	35,000	6.65	35,000*	
	Netherlands	6,000	6.52	26,650	
	W. Germany	4,950	7.50	14,730	
	Mauritania	1,800	4.41	1,800*	
	Australia	1,250	7.19	23,900	
		<u>86,800</u>	-	<u>550,580</u>	
LOFOTEN COD	Finland	2,500	8.28	4,500	3,601,183
	Sweden	800	9.47	800*	
	Belgium	4,045	10.30	45,670	
	Italy	362,270	9.21	3,156,522	
	Netherlands	1,500	7.34	13,950	
	Switzerland	1,000	7.84	4,600	
	W. Germany	17,350	8.34	24,372	
	Canada	1,000	10.40	11,750	
	Australia	2,000	9.37	2,000*	
	<u>392,465</u>	-	<u>3,264,164</u>		

* First time sale in 1983

(Cont'd)

Species	Shipped to	Nov. Qty/kg	Price/kg C\$@ .1656	Jan.- Nov. Qty/kg	Value C\$ November
OTHER ROUND COD	Sweden	50	10.92	275	
	Belgium	200	7.45	200*	
	Italy	4,100	8.39	59,800	
	Netherlands	500	6.47	1,700	
	UK	900	5.83	10,215	
	W. Germany	3,000	5.64	14,620	
	Austria	50	6.21	200	
	Cameroon	8,100	5.74	239,850	
	Mauritania	5,400	4.41	5,400*	
	Nigeria	535,500	6.89	2,773,935	
			<u>557,800</u>	-	<u>3,106,195</u>
SPLIT SAI THE	Finland	250	8.28	3,250	
	Sweden	47,275	6.71	67,776	
	Mauritania	9,000	4.41	9,000*	
			<u>56,525</u>	-	<u>80,026</u>
ROUND SAI THE	Switzerland	4,000	5.67	24,000	
	W. Germany	550	5.46	1,100	
	Mauritania	68,040	4.41	115,785	
	Nigeria	259,470	5.52	2,646,855	
	Senegal	9,990	4.41	9,990*	
			<u>342,050</u>	-	<u>2,797,730</u>
OTHER	Finland	1,900	11.61	18,500	
	Sweden	11,100	7.75	49,306	
	W. Germany	500	8.64	815	
	Liberia	20	3.15	20*	
			<u>13,520</u>	-	<u>68,641</u>
					<u><u>12,596,186</u></u>

* First time sale in 1983

Norwegian Stockfish Exports, November 1983

By Country

Country	Species	Nov. Qty/kg	Bales	Price/ Bale C\$ FOB	Value C\$
Nigeria	Cusk	180,000	4,000	329.85	1,319,400
	Haddock	26,250	583	194.86	113,602
	Split Cod	81,000	1,800	329.40	592,920
	Other Round Cod	535,500	11,900	310.05	3,689,595
	Round Saithe	259,470	5,766	248.40	1,432,274
		<u>1,082,170</u>	<u>24,048</u>	-	<u>7,147,791</u>
Italy	Finmark Cod	34,900	775	285.50	221,266
	Lofoten Cod	362,270	8,050	414.47	3,336,506
	Other Round Cod	4,100	91	378.01	34,399
		<u>401,270</u>	<u>8,917</u>	-	<u>3,592,171</u>
Cameroon	Cusk	16,200	360	258.30	92,988
	Split Cod	2,700	60	258.30	15,498
	Other Round Cod	8,100	180	258.30	46,494
		<u>17,000</u>	<u>378</u>	-	<u>154,980</u>
Mauritania	Haddock	4,050	90	198.45	17,860
	Finmark Cod	1,800	40	198.45	7,938
	Other Round Cod	5,400	120	198.45	23,814
	Split Saithe	9,000	200	198.45	39,690
	Round Saithe	68,040	1,512	198.45	300,056
		<u>88,290</u>	<u>1,962</u>	-	<u>389,358</u>
Ghana	Haddock	<u>5,850</u>	<u>130</u>	<u>198.45</u>	<u>25,798</u>
Denmark	Split Cod	<u>455</u>	<u>10</u>	<u>97.83</u>	<u>978</u>
Sweden	Split Cod	4,200	93	390.65	36,330
	Lofoten Cod	800	18	420.89	7,576
	Other Round Cod	50	1	546.00	546
	Split Saithe	9,000	200	198.45	39,690
	Other	11,100	247	348.28	86,025
		<u>25,150</u>	<u>559</u>	-	<u>170,167</u>
W. Germany	Split Cod	2,100	47	392.30	18,438
	Finmark Cod	4,950	110	337.50	37,125
	Lofoten Cod	17,350	385	375.84	144,699
	Other Round Cod	3,000	67	262.54	16,920
	Round Saithe	550	12	250.25	3,003
	Other	500	11	392.73	4,320
		<u>28,350</u>	<u>630</u>	-	<u>224,505</u>

(Cont'd)

Country	Species	Nov. Qty/kg	Bales	Price/ Bale C\$ FOB	Value C\$
Finland	Split Cod	7,050	156	389.11	60,700
	Lofoten Cod	2,500	55	376.36	20,700
	Split Saithe	250	5	414.00	2,070
	Other	1,900	42	525.21	22,059
		<u>12,150</u>	<u>270</u>	-	<u>105,529</u>
Belgium	Split Cod	400	9	321.78	2,896
	Finnmark Cod	500	11	343.18	3,775
	Lofoten Cod	4,045	89	468.13	41,663
	Other Round Cod	200	4	372.50	1,490
		<u>5,145</u>	<u>114</u>	-	<u>49,824</u>
Netherlands	Split Cod	310	7	102.30	716
	Finnmark Cod	6,000	133	294.14	39,120
	Lofoten Cod	1,500	33	333.64	11,010
	Other Round Cod	500	11	294.09	3,235
		<u>8,310</u>	<u>184</u>	-	<u>54,081</u>
France	Split Cod	1,000	22	300.45	6,610
	Finnmark Cod	2,400	53	303.85	16,104
		<u>3,400</u>	<u>275</u>	-	<u>22,714</u>
Switzerland	Lofoten Cod	1,000	22	356.36	7,840
	Round Saithe	4,000	89	254.83	22,680
		<u>5,000</u>	<u>111</u>	-	<u>30,520</u>
Yugoslavia	Finnmark Cod	<u>35,000</u>	<u>778</u>	<u>299.16</u>	<u>232,750</u>
Australia	Finnmark Cod	1,250	28	320.98	8,987
		2,000	44	425.91	18,740
		<u>3,250</u>	<u>72</u>	-	<u>27,727</u>
Canada	Lofoten Cod	<u>1,000</u>	<u>22</u>	<u>472.73</u>	<u>10,400</u>
USA	Split Cod	<u>1,350</u>	<u>30</u>	<u>389.70</u>	<u>11,691</u>
Austria	Other Round Cod	<u>50</u>	<u>1</u>	<u>310.50</u>	<u>310</u>
Senegal	Round Saithe	<u>9,990</u>	<u>222</u>	<u>198.45</u>	<u>44,055</u>
Liberia	Other	<u>20</u>	<u>0.5</u>	<u>126.00</u>	<u>63</u>

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FISHERY MARKET DEVELOPMENTS

COMMERCIALISATION DES PRODUITS DE LA PÊCHE



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NEW PRODUCT DEVELOPMENT
CANADIAN SALTED MINCED FISH

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Canada

INTRODUCTION

A lot of attention has been directed at minced fish recently, partly in view of the marketing of such new products as artificial crab in North America. The technology for the production of artificial crab and other such products originated in Japan where hundreds of thousands of tonnes of seafood is sold in a compounded form as Kamaboko and other products. Some small success has been achieved in the U.S.A using very low cost fish to prepare the surimi. While costs in Canada may preclude production of a Kamaboko-type product, the salting of minced fish, particularly cod, is feasible for Canadian cost structures and should be worthy of consideration as a modern alternate to the traditional salted form.

Salted Minced Fish

Salted minced fish is a new product capable of utilizing mechanically deboned fish flesh for high yield and low waste while taking advantage of the salting method of preservation.

It can be made available in granular form, for use in soups or chowders, or for cooking with rice after a quick-rinse desalting.

It can be made available in a pressed-cake, portion-size form sealed in plastic pouch, or other similar packing method.

Developed since 1975 as part of a program to increase utilization of previously wasted fish flesh, the process takes advantage of deboning machines which can get yields as high as 75% from whole, headless dressed cod in comparison to fillets which yield only 46%. Yield from frames may be as high as 66%.

With care, that fish are properly bled and cleaned, the mince is close to fillet in color, it has attractive features as a fish product whose time has come.

It can:

- use a wide variety of raw materials
- lend itself to continuous mechanical processing
- be readily used in formulated products
- species can be blended for desirable advantages
- preservatives and other ingredients can be incorporated directly into the product

Its product requires low capital investment in an inexpensive deboning machine.

The Process

1. Cleaning fish, removing heads, viscera and the bone as normal for salt fish.

2. Separate the flesh from skin and bone mechanically.
3. Mix with fine salt.
4. Hold for a time at slightly elevated temperature.
5. Separate the free brine which is formed.
6. Shape (if desired).
7. Dry.
8. Package.

Time required: one day.

The product is stable after Step 7.

There are disadvantages:

- distinctive products and product forms have yet to be developed for the potential quantities available;
- breaking up the tissue increases surface area allowing accelerated bacteriological and oxidative changes;
- without salt, frozen storage life is generally shorter than for fillets and some biochemical reactions seem to be speeded up.

Salted minced fish has potential as a substitute for some traditional preparations. The mince can be readily saturated with salt with the entire process being completed in an hour or two rather than the days or weeks required in the normal saltfish process.

Its potential will only be realized through the development of quality products with consumer appeal. The Technical University of Nova Scotia has developed salted fish products; but their commercialization remains to be exploited.

Recipes for using $\frac{1}{2}$ kg. bags of dried salted Atlantic Cod are available. The product is 20% water; 20% salt and 40% fish solids (mainly protein).

Parasites

These must be removed because it was found that 85-90% remain in the minced flesh with 50% remaining intact.

Deterioration

Minced fish flesh is a problem unless salted since otherwise, fresh material is prone to bacterial spoilage and rapid texture deterioration which occurs at twice the rate of a similar process in fillets. Kidney tissue and dark laterline muscle in cod lie next to the backbone and is the source of an enzyme system. (This system is particularly active in Hake.) The removal of the front half of the backbone, as is done for regular dried salt cod, removes the source of this enzyme system and indeed may originally have been the reason for so doing.

Preservation and Storage

Minced cod, salted and dried, stores well. Drying to 20-25% moisture prevents growth of halophilic moisture even during extended storage at 35°C.

Desalting, in comparison with regular salted cod is simple.

Soak in 2L of cold water for 30 minutes, drain through a fine seive. Repeat if necessary to taste. Use immediately.

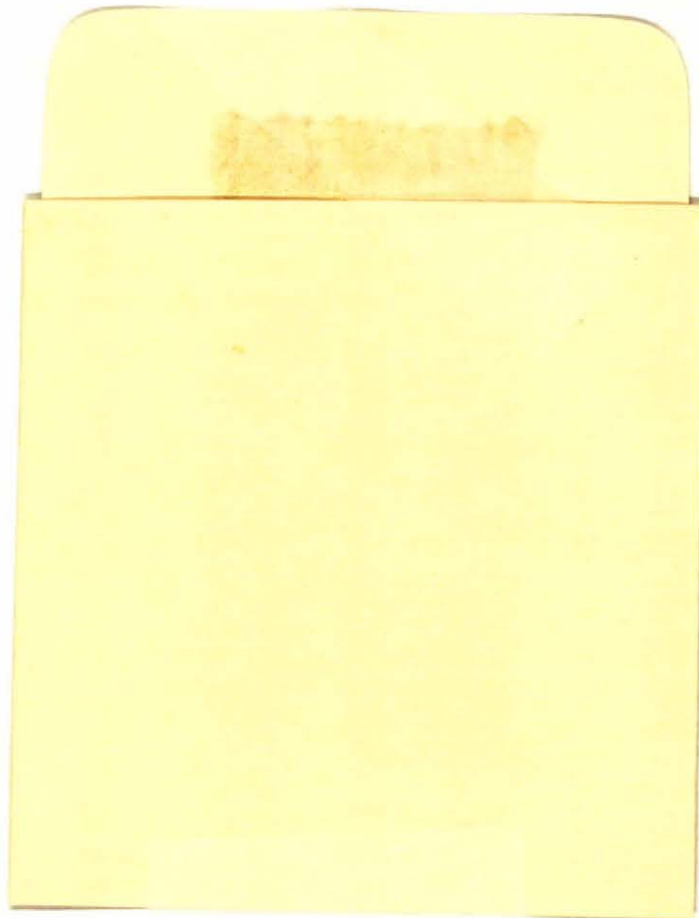
Marketing

The salted minced fish portions should be acceptable wherever dry salted fish are sold but where the extra work and time involved in the desalting, etc. is becoming a burden as more women go to work.

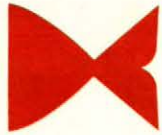
Salt fish producers wishing to test market this product could apply for assistance under various federal programs.

Production

The overall concept is the rapid production of an acceptable, shelf-stable product from underutilized fish mince which would compare favourably with traditional salt cod but at a lower cost of production.



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FISHERY MARKET DEVELOPMENTS COMMERCIALISATION DES PRODUITS DE LA PÊCHE



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FISH QUALITY DEVELOPMENT RELATED TO MARKETS

A look at the operation of Icelandic Freezing Plants and their attitude towards fish quality, productivity and markets.

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Aussi disponible en français

December 1983

FISH QUALITY DEVELOPMENT

A look at the operation of Icelandic Freezing Plants, their attitude towards fish quality, productivity, and markets.

(Condensed from an address by Hjalti Einarsson, Vice President, The Icelandic Freezing Plants Corp.)

Icelandic fish producers were among the first to utilize the plate freezers developed by American Birdseye in 1929, and the Icelandic Freezing Plants Corporation (S.H.) was established in February 1942 to sell in foreign markets products from its members' plants.

The Corporation:

- sells in foreign markets products produced in members' plants;
- only those who operate freezing plants qualify for membership;
- the Corporation monitors production to ensure and promote improvements in product quality;
- every member is responsible for his own production and is liable for compensation payments to the purchaser on account of deficits;
- operates a technical instruction service for the freezing plants and an inspection service of 20 persons of whom 14 carry out daily inspection in the plants, the others engage in research and development and new developments.

The Corporation is authorized to control frozen production to ensure the highest quality and its members are obliged to follow the Board's instructions.

A system of cross liability is employed in which a producer of poor product must pay compensation to the Corporation for product defects, delivery delays, or wrong or misleading information.

Each member plant has its own on-time quality control system which sets out that in a processing hall where trimming and packing is performed there is one quality controller for each 15 persons trimming and packing. Plus, there is one appraiser per plant who examines products for export; a foreman. There may be 6 to 10 appraisers in a large plant -- an expensive operation.

Penalty Payments System for Poor Quality

Samples examined by the Corporation's inspectors are classified 'A' to 'H' according to the number of defects found.

Currently, prices are reduced for worms and bones; each species of fish being calculated differently, but fillet packs of the same species assessed jointly; block packs jointly; etc.

The price reduction is proportional, so that if a percentage of the samples falls into class 'C' the same percentage of the production of that species/pack will be subject to the price reduction that class 'C' entails for a period of two weeks.

The total price reduction is reimbursed to plants in accordance with rules established in 1975 as follows:

- The money from the price reduction system is kept in a separate account and a settlement made at the end of each production period or fishing season (winter; summer; fall fishing seasons).
- The whole amount is disbursed with payments going only to those who produced class 'A' products.

This means that those who produce the best quality are rewarded and those who produce poor quality are penalized. The total payments to each plant will depend on the plant's quality output vis-à-vis the other member plants.

The system uses the Corporation's computer to calculate and monitor the price reductions but members can also monitor their own.

Quick freezing is a unique process and fish preserved in this way is in reality sold as 'fresh fish'. Once thawed it should be as fresh as it was when frozen - and oftener fresher than so-called 'fresh' fish, so raw material at time of freezing must be good and taste good.

The Corporation's grading scale for raw material and freshness:

- Grade 5: Fine
- Grade 4: Good
- Grade 3: Acceptable
- Grade 2: Dubious
- Grade 1: Not Usable

Raw material falling into grades 5 and 4 qualifies for all packs; grade 3 for some packs; but that in grade 1 or 2 must not be frozen. This, however, does not mean that it is unfit for human consumption.

The Corporation emphasizes that in reference to good raw material, other factors count besides freshness. The texture frequently governs the tastiness. Fat content in herring, Greenland halibut and catfish varies, and so does the taste. Young fish taste different from old fish; small halibut differ from large; etc. Spawning alters the texture in all species. In some species only spawning fish are desired as in herring and capelin where the appraisal is based on roe content.

Freshness by Freezing at Sea

Fish on ice keeps only for a few days. This is why vessels fishing on distant banks have opted for freezing at sea. Indications are that this will be the development in Iceland too, precisely for ensuring freshness without regard for time at sea.

Range and Diversity in Freezing

In 1982 the Corporation's plants processed 91,000 tonnes of frozen products, plus 1,700 tonnes of fresh fish -- primarily redfish fillets that went by air to the United States. The value was 2,000 million Kronur.

About 30 species were frozen in 340 different pack codes, with 25 more pack codes of fish exported by air.

Quantity by Species for 1982

	<u>'000 tonnes</u>
Cod	26.8
Redfish	21.8
Haddock	10.7
Greenland Halibut	8.6
Saithe	8.3
Herring	6.8

Other (21) species fell below 5,000 tonnes each. The number of freezing plants producing for the Corporation:

Southern Region	7
Reykjanes Peninsula	24
Western Region and Fjords	20
Northern Region	10
Eastern Fjords	5
	<u>66</u>

Frozen Products by Species of Fish

<u>Year</u>	<u>Cod</u>	<u>Haddock</u>	<u>Redfish</u>	<u>Saithe</u>	<u>Catfish and Spotted Sea Cat</u>	<u>Herring</u>	<u>S.H. Total</u>
----- TONNES -----							
1970	31.664	4.018	4.712	19.966	1.213	5	75.000
1971	28.762	4.828	7.167	11.855	1.096	1	73.000
1972	23.196	4.664	6.933	10.942	1.734	86	65.000
1973	25.241	5.915	5.401	10.094	2.306	0	67.000
1974	24.900	5.900	7.730	11.610	2.400	0	73.000
1975	30.150	6.500	7.420	11.990	2.380	79	65.000
1976	33.250	6.290	7.740	9.361	2.540	71	71.000
1977	41.390	6.740	5.920	7.730	2.150	1.889	79.000
1978	45.550	7.450	6.470	8.310	2.010	1.669	85.000
1979	46.393	9.248	11.693	10.908	1.746	6.289	108.000
1980	46.760	7.252	12.538	7.338	1.547	4.634	97.000
1981	36.373	9.341	6.517	6.517	1.500	4.609	88.000
1982	26.781	10.654	8.215	8.215	1.189	6.851	90.000

The table shows freezing by main species from 1970 to 1982. Cod peaked in 1980; haddock has climbed from 4,018t to 10,654t; Redfish has jumped to second position after cod -- 4,712t up to 21,818t; freezing of Greenland halibut has increased four times: 1,713t to 8,600t, a high in 1982. Herring freezing increases have been caused by more sales of fillets and frozen whole fish for export.

Main Markets/Demands

The 1982 sales of the Corporation went to 17 countries, either through the subsidiaries or directly from the Corporation's office in Reykjavik.

The Corporation has used subsidiary companies as the best means of entering and supplying foreign markets:

- U.S.A. - Coldwater Seafood Corporation
 - Head Office: Rowayton CT
 - Plants: Cambridge MD
 - Everett (Boston) MA
- Products Products processed from blocks
- Fillet packs (without further processing)

Sales: 38,000t in 1982 of which
17,000t frozen cod product
7,600t Haddock
6,600t Redfish
3,300t Saithe
1,700t Greenland halibut
800t Catfish

- Quality demands are high, particularly for colour, smell and taste in fillets and in blocks.
- Official U.S. inspectors (as well as Coldwater's inspectors) take samples daily for
 - (a) inspection, raw
 - (b) boiled and appraised for colour, smell, taste and texture.
- They report that official inspectors search for the poorest fillet and grade the whole pack by that standard.

W. Germany

- Werkaufzentrale Islandisher
Kuhlhauser
Hamburg

Sales: 3,000t of 45 pack codes in 1982 of which:
turbot fillets, 800t;
Cod fillets and blocks 600t;
Redfish 1,400t.

- Smoked Greenland Halibut (Turbot) is popular in Germany but it must be fresh and fat - watery halibut must not be frozen for this market.

The Corporation had to negotiate price reductions because of this quality fault in May 1982.

- West German authorities demand that frozen fish be fresh and use chemical analysis of volatile nitrogen compounds to determine freshness.
- The Corporation is not satisfied with its penetration of the German market for Redfish - ungutted - which must be absolutely fresh when frozen.

U.K.

- Icelandic Freezing Plants Ltd.
Plant: Grimsby
Coldstore

Sales: - 15,000t in 1982, of which
8,400t Cod (fillets and blocks)
2,200t Haddock
2,500t Herring (fillets and frozen whole)

Main market for roe and flatfish.
Freshness is main quality criterion.

Japan

- Sales in 1982 were 3,000t -- an unusually small quantity because of limitations on Capelin fishing.

i.e. in 1973, 12,600t
1974, 13,700t

Iceland's only market for frozen capelin and capelin roe. The capelin must be full of roe, with the roe at the right stage of development.

The corporation is now looking at Redfish markets in Japan for frozen whole, fresh and red, scales on. Also large deep-sea shrimp, in shell, frozen fresh, and classified by size.

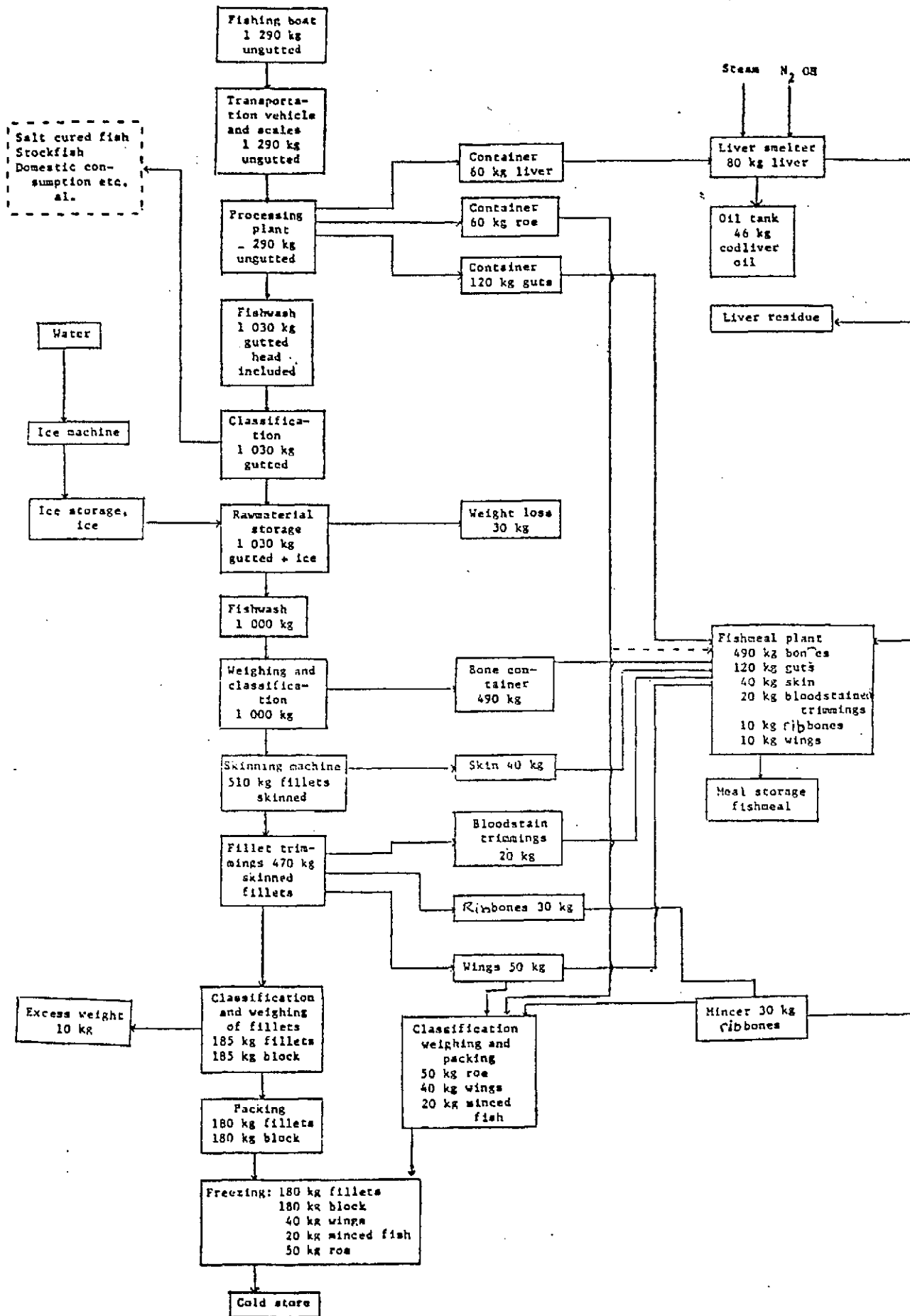
U.S.S.R.:

Joint sales by the Corporation and the Fish Products Division of the Federation of Icelandic Cooperative Society.

- 1982 Sales 12,200 t of fillets of which 9,800 t Redfish; 1,200 Turbot 3,700 t of frozen whole fish of which 3,000 t turbot; 500 t Plaice.
- Fillets are pin bones in, flaps on.
- Markings Russian and English.
- Packaging: strong and multiple banded to withstand rough handling.

APPENDIX A

Production - and material process



APPENDIX B

<u>CLASS</u>	<u>MAIN MARKET</u>
1. <u>Fish frozen whole</u>	
Head included	
Various species of plaice	Britain, U.S.S.R.
Small halibut	Western Europe
Small Greenland halibut	U.S.S.R.
Herring	Western and Eastern Europe
Capelin	Japan
Beheaded:	
All major flatfish species, gutted ..	U.S.S.R.
Cod and haddock	Eastern and Southern Europe
Greenland halibut	Western Europe
Large halibut	Western Europe
Small halibut	United States
2. <u>Fillet and fillet parts:</u>	
with skin, pin bones and flaps	
Cod and haddock	Britain
Various species of plaice	Britain
Redfish	U.S.S.R. (United States)
with skin, boneless, without wings	
Redfish	United States
Skinless with pin bones and wings	
Saithe, ling, tusk and catfish	Eastern Europe
Greenland halibut	U.S.S.R.
Cod, haddock and redfish	Western Europe
Skinless, boneless, without flaps	
Cod, haddock, catfish, redfish, saithe, halibut, Greenland halibut, plaice	United States

Formed fish blocks:

Fillets of cod, haddock, saithe,
redfish, ling, tusk, Greenland
halibut, halibut, various species
of plaice, etc., skinless and
boneless U.S. and Western Europe
Minced and ground fish from cod,
haddock, catfish, saithe, redfish,
ling and more U.S. and Western Europe
Fillets of cod, haddock, saithe,
redfish and more, pin bones in Western Europe

3. Crustaceans

Lobster

Whole lobster Southern Europe
Lobster tails in the shell U.S. and Western Europe
Shelled lobster tail U.S. and Western Europe

Shrimp

Shallow water shrimp,
machine-peeled, small, boiled Western Europe and
Scandinavian countries
Deep-sea shrimp, machine peeled,
medium size Western Europe and
Scandinavian countries
Deep-sea shrimp, large, in the
shell, boiled Scandinavian countries and
Western Europe
Deep-sea shrimp, large, in the
shell, raw Japan and Western Europe

Shellfish

Scallops United States

Roe

Cod, haddock, saithe, ling and other Western Europe and
Scandinavian countries
Capelin Japan

LOSS OF QUALITY IN FROZEN FISH

1. Damage to Raw Material

1. Damage caused by fishing gear.
2. Damage caused by incorrect processing or delays in processing.
3. Damage caused by bilgewater.
4. Storage damage caused by long storage and/or insufficient icing.
5. Storage damage caused by weight pressures or rough treatment.
6. Bacterial damage caused by lack of hygiene and insufficient washing of the fish.
7. Chemical reactions in raw material, decay, rot, rancidity, etc.
8. Chemical pollution.

2. Processing Damage

1. Damage from rough treatment, carelessness, and ignorance during the handling of fish and fillets.
2. Damage caused by poor condition of processing machinery.
3. Bacterial damage caused by lack of hygiene and insufficient washing of the fish.
4. Processing defects, worms, bones, blood, skin, membranes, loose texture.
5. Foreign objects such as flies, hair, wood splinters, metal splinters, plastic splinters or tags, cardboard, etc.
6. Chemical pollution.
7. Loss of quality owing to incorrect classification, cutting of fillets, etc.
8. Packing and weighing. Lack of neatness in finalizing product appearance and incorrect weight.
9. Incorrect use of packing material and incorrect markings.

3. Damage at Time of Freezing

1. Imperfect freezing, insufficient freezing.
2. Deformed packs due to wrong forms being used.
3. Imperfect pressure.
4. Poorly formed blocks for various reasons:

Imperfect packing material, imperfect block forms, insufficient freezing, imperfect pressure, quantity shortfall in packs, poor placement, ice on freezing pans (causes streaks or dents), misshaping, ice formations in packs owing to excessive wetness of fish when packed, frost on pack formed during handling in and out of cold store, slow freezing of blocks, broken or cracked blocks, dried-up blocks, etc.

4. Storage Damage During Freezing

1. Rancidity - chemical processes in fat.
2. Denaturalization - chemical processes in protein.
3. Dehydration - evaporation of water.

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  **FISHERY MARKET
DEVELOPMENTS**

**COMMERCIALISATION DES
PRODUITS DE LA PÊCHE**

FMD NO. 14

October 1983

Attached is a copy of the report on the Japanese Fish Product Market as prepared by the staff of the Canadian Embassy in Tokyo.

For further information
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Aussi disponible en français

FISHERIES SITUATION REPORT - JAPAN

Summary:

Landings continued year-to-year gains with increases of 3-7 per cent over corresponding period 1982. Prices remained firm for first half/83, but decreased since June due to bumper catch of low priced species and increased availability of imports. Imports for first eight months increased by 16 per cent in volume and 5 per cent in value compared to same period 1982 and prospects are favourable for good Cdn sales of various species and products. Following sections provide details of general industry performance and review situation for selected species/products of particular interest to Canada.

Overview:

For first eight months/83 landings at 51 major fishing ports increased 7 per cent over same period 1982, but average landing prices decreased substantially to yen 144/kg from yen 165/kg due to abundant catch of low priced species i.e. sardine, saury, mackerel etc. Imports for Jan-Aug/83 increased 16 per cent to 922.4 thousand MT from 797.5 thousand MT same period a year earlier. Value of imports (CIF price basis) rose 5 per cent from yen 667,476 million (Cdn dollar 3,423 million) Jan-Aug/82 to yen 701,061 million (Cdn dollar 3,690 million), and consequently average CIF price/kg of yen 760 in 83 was down 10 per cent from yen 836 in 82. Comparative import results by major categories as follows: (Units - Volume: Thousand MT, Value: yen 1,000 million):

	<u>Jan-Aug/83</u>		<u>Jan-Aug/82</u>	
	<u>Volume</u>	<u>Value</u>	<u>Volume</u>	<u>Value</u>
Live	16.0	30.9	10.5	21.0
Fresh/Frozen	707.0	541.2	642.7	528.3
Salted/Dried/Smoked	28.5	57.2	26.5	54.7
Prepared/Preserved	32.8	37.0	29.0	35.1
Others (Incl Meals)	138.1	34.9	88.8	28.3
Total	922.4	701.1	797.5	667.5

Salmon:

As previously reported, excessive inventories and bumper catch in Alaska resulted in further price decrease. Wholesale price of frozen salmon decreased 20-25 per cent compared to same period 82. Domestic autumn salmon (roe salmon) catch also reported very good. By late Sep/83, landings at major fishing ports (30 ports) in Hokkaido were in excess 20,000 MT, approx 6,000 MT over same period 82. Although bumper catch of sockeye in Bristol Bay, all other catches are reported to be much smaller than last year, especially coho catch which is less than 50 per cent of that of last year. With strong demand in U.S. for sockeye and pink for canning this year, trade forecasts that total 1983 imports of frozen salmon mostly from Alaska and Canada may not reach 90,000 MT, a 10 per cent drop from 107.7 thousand MT in 1982. Bumper catch of sockeye in Bristol Bay in short period coupled with limited freezing capacity, resulted in quality deterioration. As a result demand for high quality trolled Canadian sockeye is very strong with premium prices. Current price at Tokyo wholesale market for Alaska or Canadian frozen sockeye yen 1,150-1,250/kg for semi-dressed size 4-6: yen 1,200-1,300/kg for full-dressed: Coho yen 1,000-1,050; Chum yen 700-850; and Pink yen 700/kg.

Salmon Roe:

Hokkaido autumn salmon (roe salmon) fishery, which commenced early September is reported very good, but since salmon roe price has been very low, all domestic roe concentrated on Ikura production (approx 5,000 MT). Wholesale price of salmon roe (Sujiko), almost all imported from Alaska and Canada, dropped more than 20 per cent (yen 1,000/kg) from same period 1982. However, Japanese trade estimates that total imports of salmon roe may not reach 8,200 MT in 1983. Poor catch of sockeye in Canada reported, estimated tonnage of salmon roe imports in 1983 by species as follows (with 1982 actual imports in brackets): Chum roe 1,450 MT (2,200); Pink roe 3,100 (3,100); Sockeye roe 3,050 (2,440); Coho roe 300 (1,190); and King roe 230 (330); total: 8,130 MT (9,360); much lower than earlier anticipated. It is anticipated that continuation of recent brisk sales will result in stronger market toward year-end. Current price at Tokyo wholesale market (late Sep/83); grade one chum roe - yen 2,700-3,000/kg; grade one sockeye roe - 2,600-2900; grade one pink roe 2,200-2,500.

Herring Roe:

Jan-Aug/83 imports of salted herring roe reached 7,141 MT (Canada 5,092; USA 1,128) vs 6,157 MT for Jan-Aug/82 (Canada 4,112; USA 1,418). Total supplies of herring roe in 1983 expected to exceed 10,000 MT, approx 1,000 MT lower than earlier anticipated. Imports of roe herring from Alaska expected to exceed 30,00 MT (3,000 MT of herring roe), but about half volume of round herring will be shucked within 1983. The rest to be carried over 1984 season due to unfavourable market condition this season. Long price negotiations between importers and processors for Alaska roe herring just recently concluded - yen 4,500/kg for grade one roe means losses for importers with high contracted prices. This price reflected on Canadian salted herring roe quoted yen 4,800-5,000/kg for grade one roe: also reflected on import price of roe via S/Korea and PR China. Current (late Sept) price of Canadian herring roe at Tokyo wholesale market is yen 6,100-6300/kg for large size, but sales are very slow as still preseason.

Herring Roe on Kelp:

Jan-Aug/83 imports reached 504 MT (Canada 212 MT: USA 292 MT) up from 446 MT (Canada 165; USA 281) for corresponding period last year. Sales in restaurant trade are steady with price yen 7,000-7,500/kg. Canadian grade one product used extensively as regular menu item in high class restaurants.

Food Herring:

Spring herring catch off Hokkaido was very poor in 1983. Jan-Aug/83 landings at 51 major fishing ports dropped 67 per cent from same period 82 to 4,390 MT. Price of fresh (defrosted Canadian Atlantic herring, and repacked) herring on Tokyo market often reaches as high as yen 1,000/kg. Demand for good imported food herring has been strong, especially from Canadian Atlantic coast, but trade disappointed to learn of poor catch in Maritimes for 1983. It is forecast that total imports from Canadian east coast may not/not reach 8,000 MT (15,000 MT in 1982).

Squid:

Domestic landings for Jan-Aug/83 of common squid at 51 major fishing ports were 21,797 MT of fresh (95 per cent of Jan-Aug/82) and 52,937 MT of frozen (113 per cent of Jan-Aug/83). However, price of common squid, which had been higher than previous year for first-half/83 declined 7-8 per cent from same period of 1982, due to abundant supply of lower price species i.e. sardine, saury and mackerel. Price decrease particularly strong for red squid for processing. Imports for Jan-Aug/83 of squid/cuttlefish reached 77,099 MT (61,078 MT in Jan-Aug/82). Imports of Argentina Illex from Poland reached 22,353 MT (4,056 MT same period 82); 7,498 MT from Argentina (5,015 MT/82); and 2,013 MT from New Zealand (2,470 MT/82). Argentina Illex has completely taken over shortage of CDN Illex. Current prices of frozen common squid at Tokyo market are yen 4,000/case of 7.5 kg containing 16-20 squid: yen 3,500/case for 21-25 size: and yen 3,800 for 25-30 size. Fresh squid from northern Japan sold at yen 350-700/kg.

Black Cod:

As previously reported, price and sales of black cod weakened in 1983 due to abundant supply of other cheaper competitive species. Inventories of small size black cod have not been eliminated, and demand for B.C. black cod has not recovered yet. Of 3,500 S/T of black cod caught in B.C., approx 500 S/T still unsold. Current prices at Tokyo market yen 880-900/kg size 4-6 fish/case of 12 kgs: yen 750 size 7-8; and no sales quotations for smaller size.

Capelin:

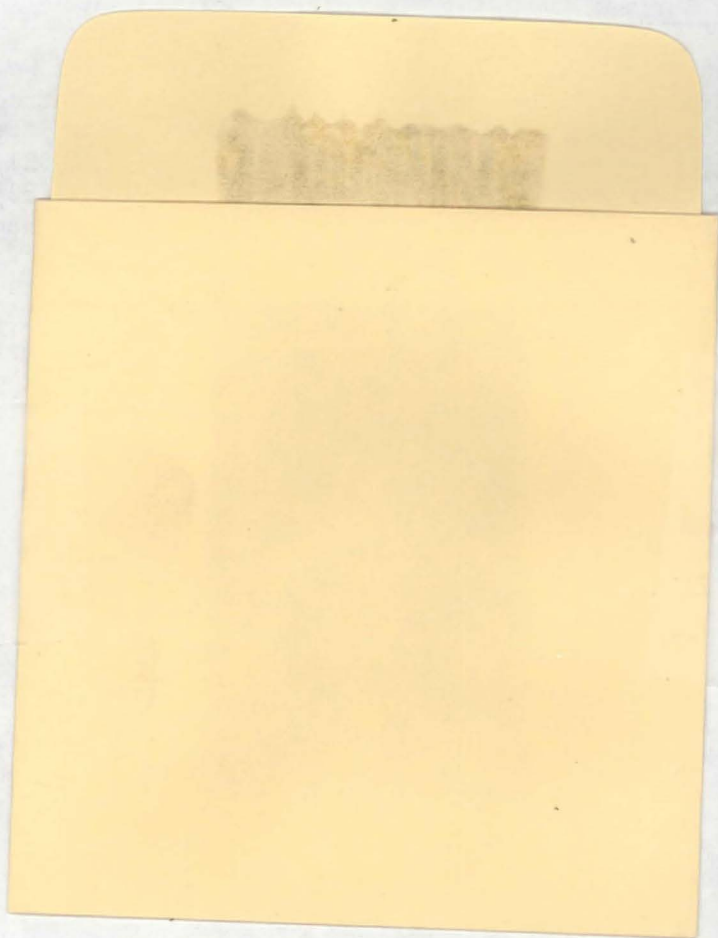
Imports of capelin for Jan-Aug/83 34,908 MT (17,757 from Norway, 10051, from USSR, 7,078 from Canada), (23,049 MT same period 82). Shipments from Norway and USSR are all completed now, and Canadian shipments started Aug 83. Sales of Canadian capelin are excellent with improved quality - freshness, good sizing and sex segregations - as well as appropriate price. Traders and processors are now confident in sales of 30,00 MT (female) per annum.

Crab Sections:

Alaska crab season now terminated with poor catch for all high class crab species - king, snow (both *C. Bairdi* and *C. Opillio*). Demand for Canadian Snow (*C. Opillio*) getting strong. However, as Crab meat price in USA has increased, purchase of 1983 season (on contract basis) not more than 3,300 MT (1,500 MT of fresh/frozen and 1,800 MT of boiled/frozen). Jan-Aug/83 imports of crab were 14,571 MT (USA - 6,227; Canada, 3,152; S/Korea, 1,648; PR China, 2,862 - mostly blue crab from last two countries), down from 16,949 MT Jan-Aug/82 (USA, 10,589; Canada, 2,340). Sales are still slow in spite of 20 per cent lower wholesale prices. Current wholesale prices at Tokyo market for snow crab are (repacked in shrink pack of 5-10 kgs case): 3L - yen 1,750-1,800/kg; 2L - yen 1,650-1,700; L - yen 1,500; M - 1,300; and S- 1,050. Boiled/frozen Canadian *Opillio* sections, size 5 oz and over (M size) repacked in small case of 2 kgs sold at yen 1,450/kg. As result of short supply, prices expected to increase toward year-end, after excess inventories eliminated - currently approx 6,000 MT.

Northern Shrimp:

Due to poor catch of Northern shrimp off (East and West) Greenland, trade forecasts that total imports in 1983, on contract basis, will be only 4,800 MT. In particular, supply of large size (50/70 count/kg) expected to be only 1,300 MT (2,500 for 82). Breakdown by supplying country: 2,000 MT from Norway, (2,684 MT/82), 500 MT from Denmark (1,656 MT/82 - due to flag change to Greenland), 2,000 MT from Greenland (201 MT/82), and 300 MT from France, Canada and UK (551 MT/82). Importers sales price for good products currently yen 2,300/kg for 2L (50/70 count), yen 1,500-1,600 for L (70/90), and 1,250-1,300 for M size. Domestic catch of Northern shrimp was good and fishermen's prices for fresh product still about yen 1,000/kg. Sales of imported products not active yet. Will begin after domestic fresh supplies decrease late Oct/83.





**FISHERY MARKET
DEVELOPMENTS**

**COMMERCIALISATION DES
PRODUITS DE LA PÊCHE**

FMD No. 13

July 1983

Attached is a copy of the first quarter
1983 report on the Japanese Fish Product
Market as prepared by the staff of the
Canadian Embassy in Tokyo.

For further information
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Aussi disponible en français

FISHERIES SITUATION REPORT - JAPANSummary:

Japanese Government recently announced that 1982 catch totalled 11,414 thousand MT, increase of 96,000 MT (1 P.C.) over 1981 and new record. However volume is below earlier projections based on activity at 66 major ports which indicated catch would increase by 4 percent. In first quarter/83, landings continued to record year-to-year gains with increase of 8 percent over same period 1982. Prices remained firm. Imports in first quarter increase by 27 percent in both volume and value compared to same period of 1982 and prospects are favourable for good Canadian sales of various species and products. (Following sections provide details of general industry performance and review situation for selected species/products of particular interest to Canada.)

Special Note:

Commencing this year, Japanese Government has changed its landings tabulations from 66 to 51 major ports. Therefore comments in this and future reports will be based on data from this new survey. As back data for these 51 ports has been provided for 1982, year-to-year comparisons with 1983 results will be valid.

Overview:

First quarter/83 landings at 51 major fishing ports increased 8 percent over same period 82 and average landing prices also increased to yen 134 from yen 127. Imports for January-March were strong, recording of 26.8 percent to 308.5 thousand MT from 243.2 thousand MT a year earlier. Value of imports (CIF prices) also rose by 26.7 percent from yen 176,505 million (Canadian dollar 929 million) January-March 82 to yen 223,392 million (Canadian dollar 1,176 million) and average CIF price/kg of yen 726 in 83 showed no significant change from yen 724 in 82. This performance reflects relatively stable exchange rate of yen to US dollars. Comparative import results by major categories are as follows: (Unit - Volume: Thousand MT, value: yen 1,000 million):

	JAN-MAR/83		JAN-MAR/82	
	VOLUME	VALUE	VOLUME	VALUE
Live	4.1	8.3	2.8	6.3
Fresh/Frozen	227.3	179.5	196.4	141.6
Salted/Dried/Smoked	6.7	8.7	6.6	8.8
Prepared/Preserved	13.4	13.4	9.5	10.3
Others	57.0	13.5	27.8	9.5
TOTAL	308.5	223.4	243.2	176.5

Salmon:

Combination of high prices (reflecting domestic catch) and record imports resulted in year end carryover of approximately 55,000 MT as result, prices have decreased substantially and, with active sales, inventories at end of April were 27,000 MT. Domestic spring season for Salmon commenced May 1 and inshore landings (mostly Chum with some Sockeye) of chilled products are selling well at prices approximately 20 percent below last year. Although Alaska and Canadian Salmon Fishery has not started yet, Japanese trade estimates that approximately 100,000 MT will be imported in 1983 if product is available at prices 10-20 percent lower than last year. Current (mid May) prices of imported frozen Salmon at Tokyo market are: Sockeye (size 4-6) semi-dressed yen 1,150-1,250/kg full-dressed yen 1,200-1,300/kg; Coho yen 1,000-1,050/kg, Chum 950-1,000/kg; and Pink 700/kg. Good quality salted sockeye (Alaska/Canada) sold at yen 1,600-1,800/kg at Tokyo market.

Salmon Roe:

Good sales at relatively cheaper prices have been reported for all Salmon Roe products during first quarter. Trade estimates total Salmon Roe imports in 1983 should be about 10,000 MT, and prospects are that prices will remain below 1982 levels throughout year. Current price (late May) in Tokyo market for Chum Roe is yen 3,200-3,500/kg for grade one. Air freighted fresh Sockeye and Pink Roe will arrive in a few weeks from Alaska and trade expects initial prices will be yen 1,000-1,500/kg cheaper than in 1982.

Herring Roe:

Trade expects that supplies of Herring Roe in 1983 will exceed 11,000 MT of which 9,200 MT will be full shape Roe and 1,800 MT off-grade. Supplies will include 5,000 MT from Canada, 5,500 MT from USA (more than half from Roe Herring imports), over 1,000 MT inventory carried over from 1982, plus 1,000 MT of frozen Roe from Atlantic Herring (mostly for manufacturing). Trade concerned that prices for San Francisco Bay Roe Herring and Canadian products, which exceed Canadian dollar 1000/lb, will result in wholesale prices of finished products of more than yen 6,500/kg and may lead to renewed consumer resistance. Current price at Tokyo wholesale market is yen 6,400-6,500/kg for large, medium and small size (mostly San Francisco Roe).

Herring Roe on Kelp:

As this is off season for fisheries in Canada and Alaska, as well as for Japanese sales, there is not much to report. Prices which declined in early 1983 are expected to continue at lower levels until price negotiations for 1983 harvest are concluded.

Food Herring:

Domestic catch of spring Herring off Hokkaido, which was good in 1982, was very poor this year. First quarter/83 landings at 51 major fishing ports registered only 3,415 MT, decrease of 66 percent from same period in 1982. Price of fresh Herring should be strong throughout 1983 and trade was disappointed to learn of poor catch in Canadian Atlantic this spring.

Squid:

1982 Squid and Cuttlefish catch was 548,000 MT, increase of 31,000 MT (6 percent) over 1981 catch. However catch of common Squid was relatively poor throughout year and overall increase is attributable to good catch of other Squid/Cuttlefish. Summer Squid fishery in sea of Japan (major fishing ground) will commence June 1, 1983 but low water temperature (approximately 10° C vs ideal 12-13° C for growth of squid) has reduced prospects for large catch. Japanese jigger catch of New Zealand Squid 82-83 season was very good at approximately 35,000 MT. In contrast, Japanese trawler catch was very poor at 15,000 MT and total catch of 50,000 MT was approximately 5,000 MT less than previous season.

Catch of Argentina Illex by Japanese vessels also reported good but total volume not known yet as season continues to July. Strong prices of all Squid species in 1982 have continued with largest increases being recorded for small-size common Squid which are in short supply and commanding premiums over larger Squid which are relatively abundant. Current prices of frozen common Squid at Tokyo market are: yen 4,600-4,700/case of 7.5 kg containing 16-20 Squid; yen 4,800-4,900 for 21-25 size; yen 5,500-5,700 for 26-30 size. Import demand has been very strong. As result of poor catch Canadian Illex for two consecutive years, trade has purchased Argentina Illex from Poland and contracts may reach 17,000 MT in 1983.

Black Cod:

Short supplies of appropriate species for fish steaks (mostly northern ground fishes) resulted in strong prices for Black Cod throughout 1981 and 1983. However, situation has now changed as other cheaper species (eg Redfish) have become plentiful and Black cod prices have weakened, especially for smaller sizes. Current prices at Tokyo fish market yen 830/kg size 4-6 fish/case of 12 kgs: yen 710 size 7-8; yen 600 size 9-10; and yen 460 size 11-15. Imports from Canada or Alaska may decrease in 1983.

Capelin:

Inventory of approximately 5,000 MT Canadian Capelin carried over from 1982 was rapidly reduced prior to arrival Norway Capelin through price discount by processors to retailers. However, trade forecasts over supply in 1983 in Japan due to good harvests by Norway and USSR (17-18,000 MT from Norway including 15-16,000 MT female, and 12,000 MT unsorted from USSR with 5-6,000 MT female). As result, and recognizing availability Canadian supplies, Japanese industry is endeavouring to move 30,000 MT (female) at appropriate prices.

Crab Sections:

Prior to Alaskan Crab season, trade predicted imports of Snow Crab in 1983 would be 16,000 MT (10,000 MT from USA and 6,000 MT from Canada). However, with poor catch in Alaska and strong demand in USA for Canadian crab meat, trade has revised estimate to 10,000 MT. This amount includes 5,000 MT from USA comprising 4,000 MT of

Bairdi (1,500 fresh/frozen and 2,500 boiled/frozen) and 1,000 MT of Opilio (500 fresh/frozen, 500 boiled/frozen) and 5,000 MT Opilico from Canada (2,000 fresh/frozen and 3,000 boiled/frozen). Total represents decrease 26 percent (3,500 MT) from 1982 imports of 13,500 MT with all of reduction coming from USA as Canadian volume increasing by 500 MT. Early arrivals of Alaska Bairdi sold at approximately 20 percent below 1982 levels.

Northern Shrimp:

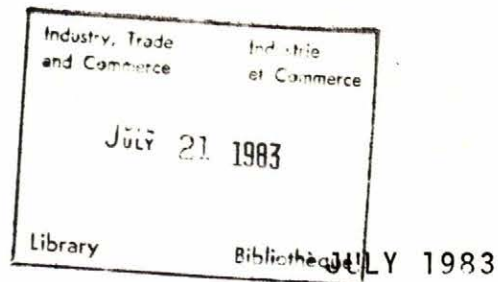
Current demand has strengthened on reports of poor catches off Eastern Greenland with particularly poor catches reported for large size products (50/70 and 70/90 account). Trade looking to fishing season in Canada and West of Greenland for relief but supplies expected to remain tight and demand for Canadian Shrimps will be strong throughout 1983.



**FISHERY MARKET
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FMD NO. 12



The Icelandic fish-pricing and quality/grading information in this report was published in Iceland's AEGIR magazine, May 1983. (To interpret the prices, exchange rates of the Icelandic Kronur to the Canadian dollar for the months concerned were: March 16, 0.05568; April 15, 0.05796; May 16, 0.5568.)

For further information
please contact:

Eon Fraser
(613) 593-4842

Aussi disponible en français

FISH PRICESDEEP SEA FISH

The Pricing Council of the Ministry for Marine Resources (of Iceland) has decided upon the following minimum value for inspected fish varieties from March 1 to May 31, 1983:

<u>Cod</u>	<u>Kronur</u>
(A) <u>Gutted Fish, Head-on</u>	
First Grade	
Number of fish in 100 kgs, 20 or less, per kg	9.50
Deduction from price for every fish over 20 in 100 kgs, per kg.	0.0475
Second Grade	
The price per kilogram in the second grade is 77% of the price in the first grade.	
Third Grade	
The price per kilogram in the third grade is 50% of the price in the first grade.	
(B) <u>Ungutted Fish</u>	
The price per kilogram of ungutted fish is determined in the following manner: The price is calculated according to section (A) even though the fish is weighed ungutted and the charge subsequently shall be:	
a) from March 1 to April 15,	86.5%
b) from April 16 to May 31	83.5%

Haddock (Ysa)Kronur(A) Gutted Fish, Head-on

First Grade

Number of fish in 100 kgs, 50 or less, per kg 7.32

Deduction from price for every fish over 50
in 100 kgs, per kg. 0.0410

Second Grade

The price per kilogram in the second grade is 77% of the
price in the first grade.

Third Grade

The price per kilogram in the third grade is 50% of the price
in the first grade.(B) Ungutted FishThe price per kilogram of ungutted fish is determined in the
following manner: The price is calculated according to
section (A) even though the fish is weighed ungutted and the
charge subsequently shall be 80% of that.Black Pollock (Ufsi), 80 cms and more: Kronur

First Grade, gutted, with head, per kg.	5.16
First Grade, ungutted, per kg.	4.10
Second Grade, gutted, with head, per kg.	4.38
Second Grade, ungutted, per kg.	3.49

Black Pollock up to 80 cms:

First Grade, gutted, with head, per kg.	3.87
First Grade, ungutted, per kg.	3.09
Second Grade, gutted, with head, per kg.	3.29
Second Grade, ungutted, per kg.	2.65

<u>Ling and Blue Ling (Langa and Blalanga)</u>	<u>Kronur</u>
First Grade, gutted, with head, per kg.	6.14
First Grade, ungutted, per kg.	4.97
Second Grade, gutted, with head, per kg.	5.24
Second Grade, ungutted, per kg.	4.20
<u>Catfish (Steinbitur)</u>	
First Grade, gutted, with head, per kg.	6.35
First Grade, ungutted, per kg.	5.24
Second Grade, gutted, with head, per kg.	4.43
Second Grade, ungutted, per kg.	3.66
<u>Spotted Catfish (Hlyri)</u>	
Gutted, with head, per kg.	4.43
Ungutted, per kg.	3.66
<u>Redfish, Red Sea-Perch (Karfi), suitable for freezing</u>	
1000 gms or more, per kg.	4.50
500 gms to 1000 gms, per kg.	3.56
<u>Tusk, 54 cms and over (Keila)</u>	
Gutted, with head per kg.	5.54
Ungutted, per kg.	5.00
<u>Tusk, 43 cms to 54 cms</u>	
Gutted, with head, per kg.	4.43
Ungutted, per kg.	4.00
<u>Whiting (Lysa)</u>	
Gutted, with head, per kg.	4.26
Ungutted, per kg.	3.22

Halibut (Lutha)Kronur

First Grade

½ kg to 3 kgs, gutted, with head, per kg.	8.93
½ kg to 3 kgs, gutted, with head, per kg.	8.93
½ kg to 3 kgs, ungutted, per kg.	8.29
3 kgs to 10 kgs. gutted, with head, per kg.	18.90
3 kgs to 10 kgs, ungutted, per kg.	17.39
10 kgs and more, gutted, with head, per kg.	24.61
10 kgs and more, ungutted, per kg.	22.73

Second Grade

½ kg to 3 kgs, gutted, with head per kg.	4.43
½ kg to 3 kgs, ungutted, per kg.	4.23
3 kgs to 10 kgs, gutted, with head, per kg.	9.37
3 kgs to 10 kgs, ungutted, per kg.	8.73
10 kgs and more, gutted, with head, per kg.	12.43
10 kgs and more, ungutted, per kg.	11.46

Greenland Halibut, suitable for freezing (Gralutha)

First Grade, 3 kgs and more, per kg.	5.48
First Grade, 1 kg to 3 kgs, per kg.	3.65
Second Grade, 1 kg and more, per kg.	3.65

Skate (Skata)

Large, gutted, per kg.	2.42
Large, ungutted, per kg.	2.01
Large, wing, per kg.	3.46

Lophius piscatorius (Skotuselur) Angelfish

Gutted, with head, per kg.	4.40
Tailpieces ready for processing, frozen in boxes, per kg.	13.10

Dogfish, ready for freezing (Hafur)

Each kg.	3.16
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Macrurus, ready for freezing (Langhali) grenadier Kronur

Each kg.	3.16
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Roe (Hrogn)

First Grade, per kg.	14.78
Second Grade, per kg.	7.19

Plaice, suitable for freezing (Skarkoli)

Each kg.	3.49
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Boxed Fish

When a gutted fish or ungutted Redfish (Karfi) is frozen in a box on the fishing boat and is of first grade quality, it is priced at 10% more than the above-mentioned class although there may be no more than 60 kgs of frozen fish in a 90 litre case, 45 in a 70 litre case and amounts corresponding to this in other-sized boxes. The price shall not be higher (box compensation) for that part of the catch of the fishing boat in boxes turning out to have contents exceeding the stipulated maximum weight consistent with the amount shown.

Fish Caught by line (Linufiskur)

The price to be paid is 10% higher than that of the first grade for gutted and ungutted Cod, Haddock, Catfish, Ling, Tush and Greenland Halibut which is caught by line and is of first grade quality. If the above-mentioned fish caught by line are frozen in boxes aboard the fishing boat the premium charge is 14% rather than 10%.

Evaluation of fresh fish

Re the evaluation of fish, follow Regulation number 55 of March 20, 1970 concerning the inspection and evaluation of fresh fish etc. or the rules which may be issued afterwards.

Price at Auction for Black Pollock and Haddock
(Karfa and Ufsa)

With reference to the Law 4 of 1, February, 1980, Section 3, a charge of 25% on the above-mentioned value shall be paid on Black Pollock from May 1 to May 31 and a 15% charge on the above price on Redfish (Karfa) for the entire pricing period, this in addition to the charge on boxed fish and fish caught by line. This charge is made from the Price Equalization Section of the Fishery Guarantee Fund (verthjofnumardeild Aflatryggingasjoth) and administers the disbursements of the Fishery Union of Iceland for outfitting, according to the rules issued by the Ministry of Marine Resources.

Other Regulations:

The determination of size is to be made along the midline of the fish from the snout to the end of the membrane of the fish-tail at the V-shaped cut.

All prices are estimated on the fish being weighed without ice and the vendor handing over the fish according to the type into which it has been sorted to transport alongside the ship.

It is pointed out that it is recommended that the crews of the fishing boats themselves sort the catch by size before it is handed over for processing at such a price as is suitable for the labour arrangements.

Reykjavik, 18, February, 1983.

Pricing Council of the Ministry of Marine Resources.

Fish Bones, Fish Entrails and Liver No 5/1983

The Pricing Council of the Ministry of Marine Resources has issued the following minimum price for fish bones, entrails and whole fish for processing into fishmeal as well as for livers from March 1 to 31, May, 1983.

7.

- a) When sold by a fish processing plant to a fishmeal producing plant:

Fishbone and whole fish not priced separately, per metric ton	Kronur	160.00
Redfish or Greenland Halibut bone and whole Redfish and Greenland Halibut, per metric ton		235.00
Catfish bone and whole catfish, per metric ton		105.00
Fish entrails, per metric ton		72.00

- b) When the whole fish is sold directly from the ship to a fishmeal producing plant:

Fish not priced separately, per metric ton		136.75
Redfish and Greenland Halibut, per metric ton		200.85
Catfish, per metric ton		89.75

This pricing is estimated on the seller delivering the abovementioned raw material to the factory tank. Redfish and Greenland Halibut bone shall be held separately.

Liver, suitable for boiling, sold from the fishing boat to the liver boiler:

- 1) Liver, landed at harbours from Akranes east to Hornafirths (Hornafjarthar), per metric ton Kronur 1930.00
- 2) Liver, landed at other harbours, per metric ton 1515.00

The price is estimated when the liver is delivered to the transport vehicle at the side of the fishing boat.

Reykjavik, 4, March, 1983

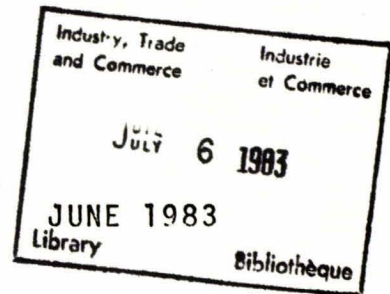
Pricing Council of the Ministry of Marine Resources.



**FISHERY MARKET
DEVELOPMENTS**

**COMMERCIALISATION DES
PRODUITS DE LA PÊCHE**

FMD NO. 11



CANNED MACKEREL & SARDINES IN OIL

The following specifications for the importation of canned mackerel and sardines in oil to Egypt were supplied by the Egyptian Embassy in Ottawa.

For further information
please contact:

Eon Fraser
(613) 593-4842

Aussi disponible en français

SPECIFICATION OF CANNED MACKEREL

Mackerel should be from Scrombroid fish, fresh, without entrails or any parts of head, and fit for canning. Fish should be caught in areas free from atomic radiation of any kind of other contamination and prepared and canned in hygienic processing plants certified for export.

It should have its characteristic colour, smell and taste and be free from any sign of putrefaction or harmful matter.

Percentage of salt in total contents of each tin should be 2% minimum and 3% maximum by weight.

Mackerel should be cut in pieces of size suitable to volume of each tin in salt solution or any suitable edible oil, fit for human consumption according to the standard international specifications of edible oil or mixture of both, and hydrogen weight should be 6.2 maximum.

Mackerel should be packed in tins of 425 grammes net weight, and specification of the tin should be as follows:

- a) to be made from tin or aluminium of good quality of uniform thickness and smoothness.
- b) the tin should be coated to prevent the reaction of the inside surface of the tin with its contents.
- c) the external appearance of the tin should be free from any sign of decay such as inflation, leaking, serration or any other signs of decay.
- d) the inside surface of each tin should be free from any rust, or any sign of reaction of the tin with its contents.
- e) the following details should be indicated on the tin either directly on the outside surface of the can or by a label stuck tightly on the tin, and should be in Arabic and foreign language: kind of mackerel; its condition; contents of tin; solution in which the mackerel is packed; net weight; trade mark; producing country; and "Imported for the account of the General Authority for Supply Commodities, Cairo."

Each consignment must be accompanied by certificate issued by health authorities certifying that the mackerel is fit for exportation, free from poisonous microbes or harmful bacteria, fit for human consumption, caught in waters free from atomic radiation, or any kind of contamination.

Product is to be packed 48 tins to a strong carton suitable to withstand the rough handling of a sea voyage and local unloading practices. Cartons to be strapped with steel or nylon strapping and marked with the following: country of production; quality; number of tins per carton; imported for the account of the General Authority for Supply Commodities, Cairo.

SPECIFICATION OF SARDINES IN OIL

Sardine should be from Sardinella fish and fit for canning, intact and free from heads or any internal parts. Fish should be caught in areas free from atomic radiation or any other kind of contamination, prepared and canned in hygienic processing plants certified for export.

They should be free from any sign of putrefaction and harmful matters and having the characteristic colour, smell and taste.

The percentage of salt in total contents of each tin shall not exceed 2%.

Sardines should be in any suitable edible oil, fit for human consumption according to the standard international specifications for edible oil; percentage of oil must range between 28-30%, percentage of drip water not to exceed 3% of net weight of total contents of each tin and a hydrogen number not greater than 6.7.

Sardines should be packed in tins. The net weight and specification of tin should be as follows:

- a) to be made from tin or aluminum of good quality and of uniform thickness and smoothness.
- b) the tin should be coated to prevent the reaction of inside surface of the tin with its contents.
- c) the external appearance of the tin should be free from any sign of decay such as inflation, leaking, serration, or any other sign of decay.
- d) the inside surface of each tin should be free from any rust, or any sign of reaction of the tin with its contents.
- e) the following details should be indicated on the tin, either directly on its outside surface or by a label stuck tightly on the tin, and should be in Arabic and foreign language; grade of quality; net weight; kind of oil and trade mark; producing country; "Imported for the Account of the General Authority for Supply Commodities, Cairo."

- f) each consignment must be accompanied by a certificate issued by health authorities certifying that the sardines are fit for exportation, free from poisonous microbes or any harmful bacteria, fit for human consumption, and caught in waters free from atomic radiation or any kind of contamination.

Each 100 tins to be packed in strong cartons fit for sea voyage and rough handling. Cartons are to be strapped with steel or nylon straps and marked: country of production; quality; number of tins in each carton; "Imported for the Account of the General Authority for Supply Commodities, Cairo."



**FISHERY MARKET
DEVELOPMENTS**

**COMMERCIALISATION DES
PRODUITS DE LA PÊCHE**

FMD NO. 10

MAY 1983

SPANISH FISHERIES SITUATION

This report is based on information
supplied by the Commercial Staff of
the Canadian Embassy in Madrid.

For information please contact:

Eon Fraser
(613) 593-4842

Aussi disponible en français

Fishery Products Division
Food & Consumer Products Industries Branch
Industry, Trade & Commerce
and Regional Economic Expansion
Ottawa, Canada K1A 0H5

Division des produits de la pêche
Produits alimentaires et produits de consommation
Industrie et commerce
et Expansion économique régionale
Ottawa, Canada K1A 0H5

Canada

Charges on products such as cod and squid when imported into Spain are: (a) Import duty ad valorem on CIF value; (b) Fiscal compensation tax (often referred to as home equalization tax) on landed duty-paid value. Whilst import duties were reduced from time to time during the last 3-4 years, fiscal compensation tax is applied using original basic duty which is higher; (c) variable compensatory levy is added in relation to weight, not to value, of imported product. It is applied regardless of source and only to imports.

All above charges must be paid by importer when clearing goods from customs. Ministry of finance later transfers variable compensatory levy funds to corresponding product marketing agency, which in the case of fish, is F.R.O.M. (Fondo de Regulacion Y Ordenacion de Los Mercados de Los Productos de La Pesca).

Spanish government introduced variable compensatory levy November 24, 1972 under Decree No. 3221 in order to protect domestic from foreign imports.

List of products affected by variable compensatory levy is published in State Gazette (BOE) weekly. Fish species which appear permanently on list include cod, squid, tuna, sardines, anchovies, hake and crustaceans.

For cod and squid, variable compensatory levy, applied since 1980, has been as follows:

	<u>Pesetas/mt</u>			
	<u>1980</u>	<u>1981</u>	<u>1982</u>	<u>1983</u>
Frozen Cod	None	4,000	4,000	4,000
Dry Salt Cod	5,000	17,000	17,000	17,000
Wet Salt Cod	5,000	12,000	17,000	12,000
Dry Salt Cod Fillets	5,000	13,000	13,000	18,000
Wet Salt Cod Fillets	5,000	13,000	13,000	13,000
Frozen Illex Squid	10,000	20,000	5,000	5,000
Frozen Illex Squid Tubes	10,000	50,000	12,500	12,500
Other Frozen Cephalopods	10	10	10	10

Amounts shown for 1980/81 and 1982 are taken from August issues of State Gazette.

Total Spanish imports and exports of fish January-December 1982, compared to 1981, as follows (Spanish customs statistics):

<u>IMPORTS</u>		<u>EXPORTS</u>	
<u>MT</u>	<u>Value</u> ('000 Pesetas)	<u>MT</u>	<u>Value</u> ('000 Pesetas)
1981 257,523	42,645,384	184,885	24,436,582
1982 320,014	55,991,753	174,042	21,260,042

1982 figures include the following products:

<u>Species</u>	<u>MT/1982</u>	<u>MT/1981</u>
Fresh Cod	8,169	(7,118)
Frozen Cod	895 (1)	(1,870)
Fresh Cod Fillets	4,604	(4,857)
Dry Salted Cod	365	(858)
Wet Salted Cod	23,444 (2)	(25,397)
Wet Salted Cod Fillets	401	(370)
Frozen Loligo Squid	7,903	(10,363)
Frozen Illex Squid	14,330	(13,950)

- (1) 18 Mt from Canada
 (2) 383 Mt from Canada

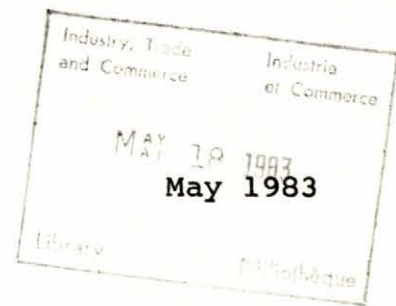
Landings of wet salted cod by the Spanish fishing fleet for 1982 are estimated at over 20,000 tonnes.



**FISHERY MARKET
DEVELOPMENTS**

**COMMERCIALISATION DES
PRODUITS DE LA PÊCHE**

FMD No. 9



Cod Roe Markets

The following has been compiled from information supplied by IT&C staff in the countries concerned.

For further information
please contact:

Eon Fraser
(613) 593-4842

Aussi disponible en français

Fishery Products Division
Food & Consumer Products Industries Branch
Industry, Trade & Commerce
and Regional Economic Expansion
Ottawa, Canada K1A 0H5

Division des produits de la pêche
Produits alimentaires et produits de consommation
Industrie et commerce
et Expansion économique régionale
Ottawa, Canada K1A 0H5

Canada

SWEDEN: Cod roe is mostly processed into popular caviar sandwich spread packed in (50 gram) squeeze tubes. Processors explicit preference is for sugar-cured, unbroken roe (no cuts), packed in 100 kg barrels. At times frozen roe is accepted. Size of roe unimportant, but texture and colour are determinants for good caviar. The recommended Scandinavian cure for sugar-salted roe calls for a precise mixture of 35 lbs. salt, 13 lbs. sugar and 7 ounces of sodium nitrate for each barrel of 26½ gallons. These ingredients should be mixed only as required because there is a tendency for sugar and salt to interact when left standing for several hours.

The mixture is sprinkled into the layers of roe as the barrel is neatly packed full. The pack should then be kept in cold storage and shipped only in refrigerated conditions. Swedish experts consider roe taken in February and March will make the best caviar. Sweden imports some 16,000 barrels annually, however, Icelandic statistics show 21,489 tonnes exported to Sweden in 1981.

Swedish Importers/Processors

- AB ABBA (Processor)
S 45041
Telex 42610
Contact: Mr. Thorsten Thornblad
Chief of Imports

- Foodia AB (Processor)
S 45300 Lysekii
TLX 42049
Contact: Mr. Kjell Hansson
Chief Buyer

- Export AB Frans Witte & Co. (Importer)
Manufakturatan 2
S 41707 Gothenburg

Prices must be competitive to those of Iceland and Norway.

FRANCE: Human consumption has developed. Market estimated at 180 mt/year. Growth rate around 3-4 per cent. Cod roe mainly imported in frozen blocks in 15 to 20 kg cartons and processed locally. Pouches are boiled, smoked and vacuum packed in individual plastic bags ready for retail. Each bag weighs 150 - 200 grams. Retail prices currently 70 - 75 FF per kg. Product is consumed throughout country and sold 50 per cent through traditional fish shops; 50 per cent through supermarkets. Most is eaten sliced on canapes; small amounts are used to make "Tarma". All roe is imported. Iceland has been a major supplier, followed by Norway and Canada.

Importers

- | | |
|---|--|
| - Saumont Pierre Chevance
59 - 61 rue du Picpus
75012 Paris, France
Tel: 343-40-30
TLX: 680-986 | - Naouri
7 avenue Danville
4600 Choisy le Roi
France
Tel: 687-33-62 TLX: 200-686 |
| - Ficus
38 Place de la Loire
SILIC 187
94563 Rungis Cedex
France | - ETS Andre Ledun
13 Quai de la Viconite
76400 Fecamp
France
Tel: 28-08-62 TLX: 190-202 |
| - ETS. Robert Labeyrie
40230 St-Glours de Marenne
France
Tel: 57-30-11 TLX: 570-297 | - ETS Marcel Baey
31 rue Albert Lavocat
B.P. 359
62205 Boulogne Sur Mer
France
Tel: 31-83-86 TLX: 110-906 |
| - Armoric
B.P. 37
29140 Rosporden
France
Tel: 287-20-20 TLX: 211-713 | - Caviar Petronian
18 Boul. Latour-Manbourg
75007 Paris
France
Tel: 55159 TLX: 200-439 |

GREECE

Greece imports high quality cod roe in brine in barrels and in frozen blocks from Iceland and Norway. Roe required is large and unbroken in 20-24 degrees brine solution.

Recent offers from Iceland/Norway:

- First quality, slightly sweet flavour
U\$100 per 120 kg barrel (wood or plastic) FOB
- Second quality, slightly salty flavour
U\$80 per 120 kg Barrel FOB
Freight (1982) U\$13/Barrel

Iceland exported 203 tonnes to Greece in 1981 of food roe and 659 tonnes of salted for bait.

To enter Greek market salted cod roe must meet above specs and be offered at lower prices to re-introduce Canadian product to market; quoting month taken; and ensuring that the roe offered has no knife cuts.

Importers:

Greek firms interested in salted cod roe are:

Mr. Chr. Kazakos,
Chairman,
Kazakos Bros.,
18 Alipedore Street,
Piraeus, Greece.

Mr. Chr. Kazakos,
Chairman,
The Import Company
Codroe Hellas Ltd.,
Piraeus, Greece.

J. Lymberopoulous Co.,
1 Nikita Street,
Piraeus, Greece.

Mr. Ant. Sykiotis,
496 Stadiou Street,
Athens, Greece.

Zavela & Rodopoulos,
Commission Agents,
23 Prasvtelous Street,
Athens, Greece.

D. Antzoulatos,
7 Nikita Street,
Piraeus, Greece.

Mr. D. Mamais
Efthymios P. Mamais & Sons,
Import Export,
25 Kapodistriou Street,
Piraeus, Greece.

UNITED KINGDOM

The U.K. market for cod roe is only concerned with frozen and canned roe; no interest in sugar-cured, salted, pickled.

- For smoking, roe must be unbroken
- Frying trade uses canned and frozen roe
- Fishmongers take frozen roe
- Cannerys want unbroken blocks

Current imports to U.K. are mostly from Denmark, Iceland, and Norway; some -- of lower quality -- from Ireland. Little Canadian roe has been available on offer.

Current prices (approximately) are:

Frozen 60 pence/lb. wholesale.

Canned (Danish) £11 to £11.50 delivered in cartons of
24 X 21 gram cans.

Major Buyer

Sea Products International
Harborne Court
67-69, Harborne Rd.
Edgbaston, Birmingham
U.K. 515 3PU

Other interested importers

MacFisheries
Johnson House
75-79 Park St.
Camberley, Surrey
U.K. 9U1 53ST

John Koch Ltd.
8 New Billingsgate Market
London E14
U.K.
Tel: (01) 987-2872

V. Stan Hope & Coy Ltd.
11 Billingsgate Market
London E14
Tel: (01) 987-3222

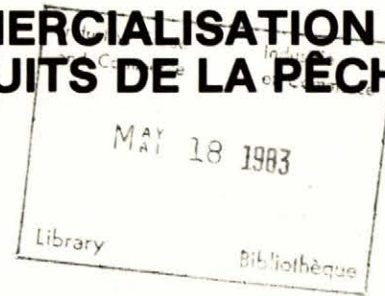
JAPAN

Japan imported in 1982, 21,004 mt of hard roe but almost all of this is from Alaska Pollock. When salt-cured and flavoured with red mustard it is an important marine product in the Japanese diet with annual demand totalling 40 - 45,000 mt. Prior to the establishment of 200-mile zones. All domestic demand was supplied by domestic production of 3 - 3.5 million tonne catch of Alaska Pollock. Now catch is 1.5 to 2.0 million tonnes and trade imports enough to cover demand. Some cod roe is used in processing but most is obtained from the domestic catch leaving a negligible market for Atlantic Cod roe in Japan.



**FISHERY MARKET
DEVELOPMENTS**

**COMMERCIALISATION DES
PRODUITS DE LA PÊCHE**



FMD No. 8

May 1983

Markets in Greece for Fishery Products

These market leads are supplied based on information provided by the Commercial Staff of the Canadian Embassy in Athens.

For further information
please contact:

Eon Fraser
(613) 593-4842

Aussi disponible en français.

Fishery Products Division
Food & Consumer Products Industries Branch
Industry, Trade & Commerce
and Regional Economic Expansion
Ottawa, Canada K1A 0H5

Division des produits de la pêche
Produits alimentaires et produits de consommation
Industrie et commerce
et Expansion économique régionale
Ottawa, Canada K1A 0H5

Canada

The following importers are interested in receiving offers from Canadian exporters:

Importer

Product Required

Stephen Nikolaidis
83 Harilaou Tricoupi St.
Athens
TLX 21-8808

Regular reliable source of
Fish meal: 72% protein;
Fat, 10% maximum
Moisture, 10% maximum
Salt, 3% maximum

1 container load now as trial shipment

Douglas Beaghton
54 Patr. Joakeim St.
Athens
TLX 21-5156 GR

Fresh Whitefish
Samples required:
10 kg on ice with quote on half container-load by air

D.N. Charalambopoulos
Food Importing Co.
217 Mejonos St.
Patras, Greece

Sardines: canned
Stockfish
Salted fish

Harry Kurkulos
Maritime Shipping &
Trading Co.
33 Akti Miaoulis Ave.
Piraeus
TLX 21-2147/2143 HEMC

Smoked Salmon (Keta or equivalent) sliced, institutional pack. For ship chandlers; Cruise ships. Sizes/weights 2 to 5kg. No marking requirements.

Salmon Roe

4 tonnes in institutional packs

Makis Vachos
Gorgona Pty Ltd.
259 Fl Venizelou Ave.
Kallithea
Athens
Telex 22-1709 GORG GR

Cod - 70-80 tonnes
(4 containers)
Weight after H&G
800 grams to 3 kg
or
Combination of hake/pollock

Dogfish: 40 to 80 tonnes
(2 containers)
or
other inexpensive white fleshed fish capable of being sliced for steaks.

Importer

Vasso Papanicolaou
6 Lycourgou St.
Piraeus 4
TLX 21 9914 PAPA GR
TEL: 417-6336

Product Required

Jonah and Stone Crab
Individually bagged in cartons

Greek market has potential for:

Wet Salted Cod, kench cure 46-48% moisture at US\$2,000/t and below CIF/Piraeus/Patras. (Competition is: Norway, Iceland, Denmark, Faroes, USSR on CAD payment terms) (market 8 to 10,000 tonnes/year)

Smoked Herring (Dutch Double Smoked, Golden Cure)

Frozen Groundfish: Inexpensive, H&G, including Cod, Flounder, Dogfish, Redfish, 800 grams to 3 kg. each fish H&G.

Quotes for cod should not exceed competitor's prices of C\$1,200 CIF Piraeus.

Frozen Squid: Small loligo preferred. Illex illecebrosus, small tubes, might find a market if offered at low enough price and market shorted on loligo.

Canned Pacific Coast Salmon:

Coho Pink
Keta Chum

Canned Sardines: Usually supplied from Morocco, Spain, Portugal.

Canned Mackerel: Must compete with Japanese brands which are established and popular.

Canned Crabmeat: 40% leg meat required.

Quality Note: Cod: The Greek sanitary regulations for fish have strict requirements. A worm found in a fish could mean rejection of the entire shipment.

Flesh must be white, such as supplied by Iceland, USSR, Faroes, etc.

For items above not tied to importer contact:

Mr. Clifford Swift
Commercial Officer
Canadian Embassy
49 Hennadiou St.
Athens, Greece

TEL: 739511/61
TLX (601) 215584 DOM GR

Copys of inspection regulations (Presidential Decree #786)
may be obtained from Fishery Products Division
Food & Consumer Products Inds. Br. (5E)
Industry, Trade and Commerce and
Regional Economic Expansion
235 Queen Street
Ottawa, Ontario
K1A 0H5



**FISHERY MARKET
DEVELOPMENTS**

**COMMERCIALISATION DES
PRODUITS DE LA PÊCHE**

FMD No. 7

April 1983

Saudi Food 83

A report on the Saudi Food 83 exhibition held in Riyadh, Kingdom of Saudi Arabia, Feb. 13-17, 1983

A review of local marketing practices, store prices and products is included with an emphasis on fishery products.

Eon Fraser
Fishery Products Division
Food & Consumer Products Industries
Branch
Industry, Trade & Commerce and
Regional Economic Expansion
235 Queen Street
Ottawa K1A 0H5
(613) 593-4842

Fishery Products Division
Food & Consumer Products Industries Branch
Industry, Trade & Commerce
and Regional Economic Expansion
Ottawa, Canada K1A 0H5

Division des produits de la pêche
Produits alimentaires et produits de consommation
Industrie et commerce
et Expansion économique régionale
Ottawa, Canada K1A 0H5

Canada

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An assessment and report on Saudi Food 83 as a means of entering the Middle East market for fishery products. A review of local marketing practices and store prices for products is included, along with the names of firms interested in fishery products.

Summary

As far as can be determined by a telephone post-show survey, the Canadian food companies attending the Saudi Food Show signed contracts for some \$533,000 worth of business, and are projecting sales of \$2.81 million for the balance of the year. However, part of the projections are in fish-processing and tea-processing machinery. Without these sales, the food portion comes to \$2.3 million. Supportive of this figure, the Ontario Ministry of Agriculture and Food has estimated \$375,000 signed, with a \$3 million projected annual sales.

Attendance

Held in the new al-Dhiafa Exhibition Centre in Riyadh, the second Saudi Food show drew 339 exhibitors from 28 countries: Saudi Arabia 39; France 36; Holland 27; Switzerland 24; the UK and the USA 23 each; Denmark 22; Australia 17; West Germany 15; Egypt and Sweden 7; Malaysia 6; Ireland, Singapore and Italy 5 each; Brazil 3; India, Thailand, Japan and Turkey 2 each; the U.A.E., Qatar, Uruguay, New Zealand, Botswana, Guatemala, Cyprus, Monaco and Papua, New Guinea one each. Canada, with an information booth, had five companies working from the booth; Ontario, with a booth three times the size of the Canadian one, brought along five other companies who had their own stands across the aisle, and elsewhere in the building.

Post Support

The post supplied the stand with Canada shopping bags, "Canada" books in Arabic, and some Maple Leaf pins and pens as giveaways.

Exhibitors were supplied with a special kit containing: a list of Chambers of Commerce; a brief review of Canada-Saudi trade; a selection of business "tips"; highlights of the Saudi Agriculture & Food Sector; Composition of Imports; Labelling of Prepackaged Foods; a good round-up of information for the prospective exporter. Mr. Shannon, the Canadian Counsellor in Riyadh, held a small reception in the Commercial Office in Riyadh, for the companies representing Canada.

Stand Costs

The floor space cost with your own stand is \$245 per square metre; using the exhibitions company's stand costs \$345 per square metre.

Promotion, Labelling and Dating

The most serious matter in this area is proposed Saudi legislation to pull closer together the dates of manufacture and consumption, to an unreasonable degree according to industry sources. There was a move afoot at the Saudi Food show to have each country's trade commissioner lobby the Saudis not to carry out this intention since current date periods are tight enough.

Expiry period for canned fish is two years; for frozen fish six months (for fatty fish) and nine months (for lean fish), all from date of production. These expiry periods are not yet approved but they are already in force. Production and expiry dates must be written as day, month, year.

A copy of the basic labelling requirements for pre-packaged foods are available from the Fishery Products Division, Food and Consumer Industries Branch, Industry, Trade and Commerce. Also available are standards for Canned Sardines, Canned Shrimps, Frozen Shrimps or prawns, Canned Tuna and Canned Mackerel.

There are various ways of labelling products for Saudi Arabia (or other Arab-speaking nations -- 18 altogether). Sometimes, the "extra" language was lithographed on the side of a herring can (for instance) while the normal English and French label was on the lid. On frozen fish, one solution was to imprint the Arabic labelling information in black in the "window" of the pack; this appealed to one industry salesman, since it uses the original design plus only one extra element. He indicated that his company might look in that direction.

On small objects, such as breakfast jam packets, there were simple black printed stick-on labels on the bottom of the packet.

Many companies at the show had Arabic publicity material. Some Far East companies had their brochures in five or six languages including Arabic, English and Spanish. The only promotional material in Arabic in the Canadian booths was from a Montreal company.

Australia had a special booklet, printed in English and Arabic, containing write-ups on each of the Australian companies participating in the show. France had a major in-store promotion in most supermarkets which tied-in with its large participation at the Saudi Food Show.

A useful publicity vehicle for prospective participants could be the "Arab Food and Drink Buyer", a promotional "magazine" published by Spindle Publishing Co. in London, England. Its 24 pages contained 22 pages of advertising, and two pages of copy on the Saudi Food Show.

Import Standards

The following Standards may be obtained from the Saudi Arabian Standards Organization

Food Section

P.O. Box 3437
Riyadh
Kingdom of Saudi Arabia

Tel: 479-3332; Tlx: 201610 SASO

OR

P.O. Box 9485
Jeddah
Kingdom of Saudi Arabia

Tel: 667-3652; Tlx: 403553

<u>Fish:</u>	Standard No.	SAA	Name
	17	46/1977	Canned Shrimps (Prawns)
	18	47/1977	Canned Tuna
	19	48/1977	Methods of Sampling fish, shellfish, and their products
	28	75/1977	Hermetically sealed round tin cans used for Canning Food- stuffs
	40	103/1978	Methods of microbiological examination for meat, fish and shellfish
	43	106/1978	Permitted food additives in edible oils and fats
	61	161/1980	Canned mackerel
	62	162/1980	Canned sardines
	70	298/1980	Methods of test for edible salt
	89	282/1982	Methods of test for edible olive oil

Food Shows as a Method of Market Entry

The food show circuit, particularly with a government sponsored booth, is one of the easiest methods by which to enter physically the Saudi Arabian marketplace. Otherwise, companies are almost barred because of visa difficulties.

It is recommended therefore that a "national" booth be used in future Middle East marketing efforts, to provide a necessary support umbrella.

There was an additional advantage of food show participation in that 39 Saudi Arabian companies, some of the largest importers and distributors of food products, were also exhibitors. This led to easier initial contacts for agents and representatives for Canadian companies

there. (With the country divided into six geographic regions, it is a necessity to have a suitable distributor or representative in each.)

Advertising

TV and radio advertising are not permitted in Saudi Arabia, so supermarket operators turn to lotteries, discounts on large purchases and contests. Safeway is now regularly using Wednesday newspaper editions to announce sales for Fridays and Saturdays. Some Eastern Provinces supermarkets also run spot ads on Bahrain radio stations.

Saudi Arabia has two good English language newspapers and a business news magazine "Saudi Business".

1. ARAB NEWS
SRM Building
Madinah Road
PO Box 4556
Jeddah
Tel: 683-1888
Tlx: 404397 ARBUS SJ

Arab News has bureaus in the UK, USA, and throughout the Middle East and advertising offices in London, Jeddah, Riyadh, Makkah, Damman, and Abha. It carried significant amounts of advertising in the two issues I obtained.

2. SAUDI GAZETTE - ("Saudi Arabia's Business Daily")
PO Box 5576
Okaz Street
Jeddah
Tel: 672-2630
Tlx: 400920 SGAZET SJ

It has offices in Jedda, Riyadh, Al Khobar, Damman, Madinah, Abha, Taif, Bisha, Tabuk, Hail, Yanbu, Qasim, Washington, Athens and Cairo.

Advertising contact is Saudi Advertising, Box 6557, Jeddah;
Tel: 665-0380, Tlx: 402220 ADVERT SJ.

It carried only six small ads in a weekday issue, but about half the newspaper was advertising in the Saturday issue.

3. ARAB TIMES

Published by
Dar Al-Seyassah
Airport Road
PO Box 2270
Shuweikh
Kuwait
Tel: 813566
Tlx: 22332 KT; Advertising Tel: 816-326

This paper carried substantial amounts of advertising, and in more consumer oriented than the Saudi papers.

All should be open to news releases on Canada's business with Saudi Arabia, or other Arab states.

4. SAUDI BUSINESS AND ARAB ECONOMIC REPORT

Published by Saudi Research and Marketing
PO Box 4556
Arab News Building
Jeddah
Tel: 683-1888
Tlx: 404397 ARBUS SJ (same as ARAB NEWS)
Advertising: PO Box 5455; Tel: 644-4444; London - Tel: 353-6859

In its sixth year of publication (by volume number) Saudi Business is a glossy 44-page magazine, somewhat similar to Canada's Financial Post Magazine. The Feb. 12-18 issue carried 14½ pages of advertising.

It also carried a list of government tenders as part of a "Business Guide", and a list of "Trade Opportunities" listing mostly exporters from various countries who were trying to find agents or distributors in Saudi Arabia. Such a listing could be valuable for Canadian exporters -- it is not known whether such a listing is charged for or not; it appears not. (Sample attached.) There is also a four-page listing of important telephone numbers, from airlines to government ministries. Subscription price is 1000 Riyals (C\$385). Publication is weekly.

Directories Available

For businessmen looking at the Saudi market, two directories are available which could be of great help:

- 1) Arabian Transport Directory Rs199 (C\$77.00)
- 2) The Gulf (business) Directory Rs130 (C\$50.00)

(These could be ordered through the Post, one supposes.)

- 3) "Doing Business in Saudi Arabia" published by the Ministry of the Kingdom of Saudi Arabia should be "must reading" for exporters. It

lists rules and regulations as well as all main government and Chamber of Commerce contacts.

Fishery Products

Fishery products were being dealt in by 30 companies according to the show catalogue. However, the Canadian companies were lumped into one stand listed as "Government of Canada - Department of External Affairs". Categories were as follows:

Canned Fish/Seafood

Chew International (USA)
Govt. of Canada**

Fish Foods

Christ Fils (France)
ESCAL (France)
International Trading Co (France)
Kerevitas (Turkey)

Fish

Connell Exports
Dat-Schaub (Denmark)
Emborg Foods (Denmark)
International Trading Co (Fr)
Kerevitas (Turkey)
Nordia Trading (Sweden)
Sea-Food USA (USA)

Fish Products

A. Esperen (Denmark)
Fendrake (UK)
Hintz Export (W. Germany)
La Couronne (Holland)

Frozen Fish

A. Esperen (Denmark)
Govt. of Canada
Kühne & Heitz (Holland)
Preiss (Denmark)
Ross Foods (UK)

Frozen Seafood

Abbar & Zainy US Beef (Saudi)
SCI (Thailand)
Saudi Fisheries Co (Saudi)
Saudi Livestock & Frozen Imports
(Saudi)
Mahammed A Sharbatly Food Corp.
(Saudi)

Seafood

Marina Seafoods (?)
Saudi Fisheries Co (Saudi)
Sea-Food USA (USA)
Virginia Dept. of Agriculture and
Consumer Services

Shellfish

Nordia Trading (Sweden)

Smoked Fish

A. Esperen (Denmark)
La Couronne (Holland)
Priess (Denmark)

**Canada could have been listed in each category; or companies listed.

*We need earlier assurance of entry; space, etc.

Fish Markets

In Riyadh, a broad range of fish products are available in fresh, frozen, or canned forms from fish stores and from modern supermarkets. The main supplier of fresh fish was Saudi Fisheries Company (40% owned by the Government) which was set up with the aim of eventual self sufficiency. For Saudi Fisheries to be able to do this, however, it would have to import those species and packs it can't supply from local waters. New Zealand and Argentina are major suppliers of frozen whole fish, as are an increasing number of countries in the southern hemisphere.

The fresh fish store was also selling golden smoked herring from Holland. One fish wholesaler handled stockfish from Norway.

Most of the frozen fish in the stores was from Denmark or the UK, with some from the U.S.A. Shrimp were from Bangladesh and India; fresh shrimp from the Arabian Gulf; mackerel from Brekkes of England, whose salmon, cod and other species were very evident in the frozen sections of the stores.

The product selection looked like this:

Supermarket 1

Product	Brand	Country	Price		Weight
			Riyals	C\$	
<u>Frozen</u>					
24 Supervalve fish fingers	Ross	England	-	-	-
4 Jumbo Cod Fingers	Ross	England	9.00	3.46	
10 Cod Fish Fingers	Ross	England	7.25	2.78	300 grs
2 Crispy Cod Portions	Ross	England	9.00	3.46	1 lb, 4.5 oz (1 kg)
2 Rainbow Trout	Prisco	Denmark	10.50	4.03	340 grs
2 Rainbow Trout	Emborg	Denmark	11.00	4.23	340 grs
Cod Fillets	Prisco	Denmark			
Plaice Fillets	Prisco	Denmark	10.50	4.03	
Haddock Fillets					
"Choice Pack" Cod Fillets	Plyms		11.00	4.23	454 grs
"Choice Pack" Cod Fillets	Plyms		10.00	3.84	400 grs
Krabben Prawns	Prisco	Denmark	13.50	5.19	14 oz
Greenland Cooked Peeled Shrimp	Emborg	Denmark	25.75	9.90	500 grs
Carnation Shrimp Crisps	Carnation	USA			
Carnation Crispy Scallops	Carnation	USA	16.50	6.34	7 oz

Product	Brand	Country	Price		Weight
			Riyals	C\$	
Fried Clams	Carnation	USA	7.80	3.00	
8 Carnation Fancy Stuffed Chrumps Breaed Plaice Fillets IQF	Carnation	USA	14.00	5.38	8 oz
Haddock Fillets IQF	Ross	Denmark	11.25	4.32	400 grs
Scampi		England	52.00	20.00	1 kg
		Denmark			

Supermarket 2

Filets of Flounder	Findus	England	14.75	5.67	
2 Rainbow Trout Schlemmerfilet	Findus	England	15.75	6.05	
Poisson au Four	Findus	England	13.30	5.11	400 grs
4 Buttered Fish Fillets	Mrs. Pauls	USA	9.30	3.57	10 oz(?)
French Fried Combination Sea-food Platter	Mrs Pauls	USA	10.00	3.84	
7 French Fried Fish Fillets	Mrs Pauls	USA	14.50	5.57	
Cod Steak in Butter	Ross	England	4.50	1.73	8 oz(?)
Smoked Haddock w/butter	Ross	England	9.50	3.65	10 oz(?)
Smoked Mackerel Fillets	Ross	England	24.50	9.42	
Prawns	Dan Maid	Denmark	21.75	8.36	
Haddock Fillets IQF	Ross	England	23.00	8.84	-
Cod Fillets IQF	Ross	England	25.00	9.61	-
Smoked Trout	Diamond B Brekkes	England	36.00	13.84	1 kg(?)
Halibut Fillets	Diamond B	England	36.50	14.03	
4 Jumbo Cod Fillets	Diamond B	England	9.00	3.46	
2 Crispy Cod Fillet Portions in Batter	Diamond B	England	9.00	3.46	
Mullet H&G Frozen			5.75	2.21	

Euromarché

10 Fish Fingers	Birds Eye	England	7.50	2.88	
Cod Steak in Butter Sauce	Ross	England	5.25?	2.01?	150 grs

Product	Brand	Country	Price		Weight
			Riyals	C\$	
Fried Clams in Light Butter	Mrs. Pauls	USA	7.25	2.78	5 oz
Fried Shrimps	Mrs. Pauls	USA	13.25	5.09	
French Fried Com- bination Plate	Mrs. Pauls	USA	10.25	3.94	
2 Danish Rainbow Trout	Prisco	Denmark	11.50	4.42	
Cod/Bacalao	Prisco	Denmark	10.50	4.03	
2 Rainbow Trout	Emborg	Denmark	10.50	4.03	
Smoked Haddock w/butter	Ross	England	10.50	4.03	
10 Fish Fingers	Plyms	UK/Saudi	15.30	5.88	
Fresh Frozen Shrimps	SALFI	Bangladesh	44.00	16.92	1 kg
7 Lobsters (Frozen) (Crayfish)	?	?	414.00	159.20	(box)
Lobsters (Frozen)	?	?	524.00	201.00	(box)
Lobster			27.20	10.46	each
Lobster			31.00	11.92	each
Fresh Shrimps	Saudi Fisheries Co.		32.00	12.30	1 kg
Golden Smoked Herring		Holland	18.00	6.92	1 kg
Haddock Fillets	Fish Shop	Ross/UK	21.00	8.07	1 kg
Cod Fillets	Fish Shop	Ross/UK	23.00	8.84	1 kg
Breaded Haddock Fillets	Fish Shop	Ross/UK	24.00	9.23	1 kg
Smoked Mackerel Fillets	Fish Shop	Ross/UK	22.00	8.46	
Prawns	Krabben/Prisco	Denmark	16.50?	?	
Frozen Lemon Sole	Plyms	UK/Saudi	11.00	4.23	400 grs
Frozen Haddock Fillets	"Choice Pack" Plyms	UK/Saudi	11.00	4.23	12 oz(?)
Frozen Cod Fillets	"Choice Pack" Plyms	UK/Saudi	7.25	2.78	12 oz(?)
Frozen Plaice Fillets	"Choice Pack" Plyms	UK/Saudi	10.00	3.84	400 grs
Plaice Fillets	Emborg	Denmark	10.50	4.03	400 grs
Fish Fryers	Prisco	Denmark	5.00	1.92	
Fish Fryers	UK Foods	England	5.25	2.01	
Whole Cooked Shrimps		France	43.75	16.82	1 kg

Product	Brand	Country	Price		Weight
			Riyals	C\$	
<u>Wholesale Market (fish)</u>					
Frozen whiting fillets	Diamond B Brekkes	UK	23.00	8.84	1 kg
10 Breaded Haddock Portions	Diamond B Brekkes	UK	20.00	7.69	1 kg
Smoked salmon (side) presliced	Diamond B Brekkes	UK	?	?	
Salmon "steaks" store cut	?	?			
60 Cod Fingers	Diamond B Brekkes	UK	30.00	11.53	?
Frozen Whole Trevally	Puketahoe Fisheries	NZ	-		10 kg box 9-count 12-count
Frozen Whole Mullet	Puketahoe Fisheries	NZ	-		10 kg box 16-count 12-count
Frozen Skinned Gutted Creamfish	Puketahoe Fisheries	NZ	-		10 kg box
Frozen Whole Squid	Argentina		-		1 kg each
Frozen Whole Pomfret	Puketahoe Fisheries	NZ	-		
Frozen Whole Mackerel	?	?	?		Small size
Frozen Whole Snapper	?	?	-		
Frozen "Lobster"	?	?	96.00	36.92	?
Fresh Goatfish	-	-	-	-	
Fresh Milkfish					
Fresh Spanish Mackerel					
<u>Canned</u>					
Aveiro Sardines	Aveiro	Portugal	2.25	0.86	124 grs
Masto Tuna	Masto	-			
Mando Whole Tuna	Mando		3.75	1.44	-
Salmon	Geisha				

Product	Brand	Country	Price		Weight
			Riyals	C\$	
Crab	Delta	-	6.00	2.30	-
Herring	Nordsee	Germany	5.75	2.21	200 grs
Sardines	Milo	Morocco			
Pink Pacific Salmon	Libby's	USA (?)	11.50	4.42	439 grs
Sardines	Cirio	Italy	3.50	1.34	115 grs
Alaska Sockeye	Monarch	USA	16.55	6.36	14 oz
Crab		Taiwan	6.10	2.34	170 grs
Lobsters	"Rungimex"	France	27.70	10.65	each

Panda Stores (chain open 24 hours/day)

Combination Seafood					
Platter	Mrs. Pauls	USA	10.00	3.84	
Smoked Trout	Black Diamond	UK	36.50	14.03	
Sliced Smoked Salmon	Black Diamond	UK	-	-	
Frozen Crab	-	-	18.75	7.21	400 grs
Halibut Fillets	-	-	36.56	14.06	
Cod Steak in Butter Sauce	-	-	4.50	1.73	-
Poisson au Four	Findus	England	13.50	5.19	400 grs
Flounder Fillets	Findus	England	14.75	5.67	400 grs
Rainbow Trout	Findus	England	15.75	6.05	340 grs
4 Fish Fillets	Mrs. Pauls	USA	9.35	3.59	14 oz(?)

Canned

Red Salmon	Libby's	USA	15.00	5.76	439 grs
Tuna	-	Philippines	3.00	1.15	70 grs
Tuna	Geisha	Japan	3.25	1.25	70 grs
Tuna	Panda (house)				
Tuna	Milo	-			
Sardines	Underwood	England			
Sardines	Amore	-			
Oysters	Empress	-			
Mackerel Fillets (cut) in veg. oil/salt skinless/boneless	Geisha	Japan	2.25	0.86	200 grs
Cut Mackerel Fillets	Golden Line Shimzi	Japan	2.00	0.769	200 grs

Distribution

Sharbatly Corp handles Danmaid brand from Denmark.
 Binzadr handles Stouffers.
 United Trading Company handles work camps.

Local Supplier

Species	Quantities Caught				Qty Exported
	Red Sea		Arabian Gulf		
	1981	1982	1981	1982*	
<u>Saudi Fisheries Company</u>					
	TOTAL				
Shrimp	360 t	1,543 t****	{	114 t**	300 t
			{	1,500 t***	
Fish	1,283 t			333 t*	
	1,643	1,543		1,947	

- * First few months
- ** January only
- *** Estimated
- **** Fish & Shrimp combined

The firm has 23 shrimp trawlers; 19 work in the Gulf; four in the Red Sea. Four new trawlers were built under contract in Australia: 24.5 metre, 850 HP steel stern trawlers which can be converted to fish trawling.

The company has retail fish stores in Dammam, Gizan, Abu Arish, Al-Khobar, Riyadh, Sabia, and Abha, with more outlets to be opened. The company also trades in fresh and frozen fish, shrimp, lobster, squid, and fillets with some varieties being imported from Somalia and the Far East.

Varieties offered include:

<u>Local Name</u>		<u>Local Name</u>	
Shroom	Gizzard Shad*	Derak	Spanish Mackerel*
Hamour	Grouper*	Bonouk	Bonfish**
Agam	Barracuda*	Shaour	Emperor* (incl. fillets)
Hamra	Snappers* (incl. fillets)	Araby	
Sheim		Hammam	Mullet (grey)
Sikin	Bream*	Sobaiti	Jacks*
Stacoza	Cobia*	Salmani	Sweetlips*
	Crayfish/spiny lobster	Gunberi	Milkfish
		Sheiry (fillets)	Shrimp (pink)*

- * Medium to high market value
- ** Low market value

The company's major markets are the public, hotels, and universities, with more than 60 per cent of the operations being retail sales and the remainder institutional and wholesale. Saudi Fisheries employs 120 plus about 300 vessel crewmen at two bases, at Damman and Gizan, which are in operation. Damman is a 10,000 square metre operation, of which 1,200 square metres are processing lines. An expansion program is underway including a central warehouse and distribution centre plus an 800-tonne cold store contracted to a German firm (Hansen and Sohne of Hamburg). Further development includes a separate site at the Damman port, including another processing plant, machine workshops, fishing gear shops, and an iceplant. All were underway in 1982. New additions will be built in Jeddah and Riyadh for storage and distribution depots.

Outlook: Positive

The broad Saudi Food Show attendance was probably due to Saudi Arabia being one of the world's fastest growing markets for processed food, the fast-rising standard of living among Saudi nationals and the purchasing power of the large (2 million) expatriate community. This has created a demand for foodstuffs of greater variety and for high quality products in particular.

During the current plan, the Ministry of Planning forecasts further increases in consumption: 11% in fresh fruit, over 50% in fresh vegetables, 36% in dairy products, and 53% in fresh meat, fish, poultry and eggs. The Planning Minister has said that this is due to the rapid, tremendous improvement of the infrastructure; ports and roads; and also to a change in tastes which has gone from bread and dairy to a protein intensive diet. The government's commitment to improving the living standards of its people, coupled with the continued and growing presence of a large expatriate population, (and no income tax) will push imports of a wide range of foodstuffs for a considerable time to come.

The effects of the growth were apparent in Riyadh, the capital, where it looked as though it had rained and the desert had sprouted buildings. The effects of this urbanization has yet to be calculated. New, completed apartments are yet to be occupied; 4,000 are being constructed for the National Guard alone. There are new 1,000 acre wholesale fruit and vegetable markets, one of which will include a fish market; new large department stores, with at least one chain (Panda) open 24 hours a day. These all point to growth in modern style food products markets. The effect of freezers, refrigerators, modern cooking facilities, kitchen garbage disposals, etcetera, are bound to influence food consumption too.

Supermarkets and Shopping Plazas

Distribution and marketing of food and household goods in Saudi Arabia have undergone dramatic changes, the souk (market) giving way to the supermarket, shopping plaza, and to department stores with provision departments and fast-food cafeterias. Supermarkets, begun in the 1960's to serve the expatriate community now see 45% Saudi shoppers. In a

series of surveys carried out in Jeddah by Saudi Business, based on a shopping cart of 45 items, supermarkets were found to be offering an increasing variety of goods derived from a greater number of countries in an ever-widening range of choice in price. In addition to branded goods, pre-packaging of fresh produce is catching on. Improved transportation is spreading these marketing methods elsewhere in the kingdom, creating a steady demand for shopfittings and equipment.

Chains:

Souks Company Ltd. opened with technical help from Southland Corp., owners of the U.S. Based 7-11 convenience stores, and management assistance from British firms. Opened 1979 (first modern supermarket), six more opened by 1982. Sizes range from 500 to 2,000 square meters (5,376 - 21,505 square feet).

Tamimi & Fouad Food Co. In 1979 opened two giant supermarkets in Dammam (east coast) and Al-Khobar (same), managed by Safeway (USA).

Panda Trading Establishment. Four stores in Riyadh, open 24 hours a day. Plans for four or five more.

Other chains are: Al-Johar; Al-Mokhtar; Al-Sawani; Sands; and Caravan.

Souks supermarkets typically carry 5,000 to 6,000 different items of which 60% are imported from 17 countries. A handful of importers supply the stores so products and prices are similar from store to store. Contracts for Saudi food imports tend to be less than \$1 million because importers are testing new suppliers. Imports increased 36% from \$3 billion in 1979 to \$4.1 billion in 1980. (Saudi imports all but 10% of its food needs.) Safeway introduced private label brands; Panda stores have followed suit.

Because it takes 10 to 15 weeks before new orders show up on supermarket shelves, the supermarkets have invested considerable capital in cold storage and warehouse facilities. Safeway built a 100,000 square foot warehouse (and has said it can't build fast enough); Souks constructed a 50,000 square foot warehouse to serve seven stores; and Al-Johar is planning a 2,000 tonne cold storage facility.

Shopper Traffic

Of 26,000 customers shopping at two Safeway stores each week, the average expenditure per trip was 75 Riyals (about \$22 U.S.) and 25% spend more than Rs200 (\$59 U.S.). One Souks supermarket traffic was 10,000/week with an average per customer expenditure of Rs55 (\$17.00 U.S.). The store's estimated gross volume was estimated to be 750 million Riyals (U.S.\$221.6M/year). Profit margins are a closely guarded secret, but competition between supermarkets is believed to have reduced profit margins from 24-30% to 5-6% -- still well above their North American counterparts.

Current mix is about 50% Saudi shoppers; 50% ex-patriates.

Industrial Catering

While large-scale construction projects continue to provide scope for industrial caterers and camp management contractors, the current plan's provisions for hospital building and the development of universities and schools also offers major markets to equipment suppliers and caterers. The Ministry of Health's U.S. \$10.5 billion construction program will add 36 new hospitals and 320 health centres and in addition there are massive hospital construction plans for the Armed Forces. Recently, Saudi Arabian businessmen have also become interested in developing private sector medical services.

In Education, total expenditures will receive U.S.\$38 billion, half of which is for capital investment. The university population will virtually double with major expansion of existing campuses such as King Abdul Aziz University, Jeddah, and the King Faisal University in the Eastern Province. In Riyadh, for instance the new university has plans for student housing for over 8,000.

Local Food Development

Saudis are now producing biscuits and sweets, bread and dairy products, bottled water, and vegetables. Bread flour consumption quadrupled between 1976 and 1980; cake flour jumped 3,000 per cent in the same time, presaging an extensive market for snacks and desserts.

Large government investment in conjunction with the major international hotel chains has seen the building of some 260 5-star hotels with excellent culinary standards and with 20,000 rooms, (27,000 more rooms are to be added by the end of 1984 under current licences).

Much of the new development will benefit the new industrial cities of Jubail on the Gulf and Yanbu on the Red Sea, the Holy cities of Mecca and Medina, and the summer resort area in the south west. Motels to complement the new highway system are also in the plan.

APPENDIX

SAUDI ARABIAN CONTACTS

Embassies

Michael M. Ellis
1st Secretary Commercial
Canadian Embassy
P.O. Box 5050
Jeddah, Saudi Arabia
Tel: 643-4597
Tlx: 401060 DOMCAN SJ

George F. Shannon
Counsellor
Embassy of Canada
P.O. Box 22593
Riyadh, Saudi Arabia
Tel: 476-5281
Tlx: 204893 CANADA SJ

Fish Trade and Associated Services

Alex Johnson
Wholesale Manager
Tamimi & Fouad Food Co. Ltd.
P.O. Box 146, Dahrn Airport
Al-Khobar, Saudi Arabia
Tel: 864-8414
Tlx: 670374 SAFWAY SJ

Managed by Safeway, USA.
Imports a large variety of
frozens. One of largest super-
market companies in
Saudi Arabia.

El-Zhrani Coldstore
Fish Market
P.O. Box 6607
Riyadh, Saudi Arabia
Tel: 31981
Tlx: 202057 SJ

Interested in samples of mullet
and perhaps redfish. Wholesales
and retails frozen and fresh
fish; much of current imports
from New Zealand

Al Salam Corporation
Attn: Eng. Galal Eldeen Bakry
P.O. Box 3394 C.R. 8018
Jeddah, Saudi Arabia
Tel: 687-8321
Tlx: 400757

Interested in importing fish,
(canned), canned fruit juices.
Is a distributor to super-
markets.

Denis Lazarlo
Promotion Officer
Al-Jazeera Super Markets
P.O. Box 8908
Riyadh, Saudi Arabia

Interested in canned fish;
frozens.

APPENDIX

CONTACTS (Cont'd.)

Iqbal A. Ladha
Managing Director
Saudia Livestock and Frozen
Imports
P.O. Box 293, Mina Road
Jeddah, Saudi Arabia
Tel: 647-9810
Tlx: 403971 KAMAL SJ

This is a subsidiary of
Sharbatly Establishment for
Trade and Development. It
handles imports of frozen fish
as well as meat.

Shafiq Ahmad
Commercial Manager
Al-Joud Trading & Contracting Est.
P.O. Box 15483
Riyadh, Saudi Arabia
Tel: 406-7077
Tlx: 203922 ATHAFY SJ

This is a general trading and
importing company which
expressed interest in juices,
vegetables as well as in fish.

Vinay Chitnis
Otraest
Oriental Trading Est.
P.O. Box 6725
Jeddah, Saudi Arabia
Tel: 647-8625
Tlx: 400537 YAHMOM SJ

This company was interested in
getting prices on canned fish.

Hamad B.M. Olayan
Technology Dept.
Saudi Basic Industries Corp.
P.O. Box 5101
Riyadh, Saudi Arabia
Tel: 401-2033
Tlx: 2-1177

Mr. Olayan was interested in
producing single cell protein
and combining with fish meal,
and in possible joint venture in
this field.

Ali Yaseen
Manager
Etaiwi Cold Storage
P.O. Box 2004
Jeddah, Saudi Arabia
Tel: 636-1590
Tlx: 401525 ETAIWCO

Interested in handling frozen
fish and other products.

APPENDIX

CONTACTS (Cont'd.)

Rebhi S. Abdelsalam
Madina Co. for Import & Trading
P.O. Box 22
Riyadh, Saudi Arabia
Tel: 478-7221
Tlx: 202067 MADICO SJ

Interested in representing
Canadian exporters in Saudi
Arabia; interest in fish eggs,
such as whitefish roe (Golden
Caviar).

T. Shinomiya
Director & General Manager
Canned Goods Department
Nozaki & Co. Ltd.
No. 16-19, Ginza 7-Chome
Chuo-Ku, Tokyo, Japan 104-91
Tel: (03) 542-9211
Tlx: J 22375

Interested in canned crab.

Johnny S.Y. Hooi
Manager, Veg-Oil Department
Bena Corporatio Sdn. Bhd.
15th Floor, Wisma Stephens
Jalan Raja Chulan
Kuala Lumpur 05-12
Tel: 434044
Tlx: MA 30643 BENINT

Interested in canned fish.

Also interested in sources of
vegetable oils in quantity.

Atta-ul Hoque
Barakah
P.O. Box 1703
Riyadh, Saudi Arabia
Tel: 465-7110
Tlx: 200201 Baraka SJ

Interested in kitchen equipment.

Sameer Tattan
Marketing
Abdulkarem Darwish Tattan
P.O. Box 523
Bahrain, Arabian Gulf
Tel: 253172
Tlx: 9178 FOODCO

Interested in canned fish.
Currently supplies supermarkets.
May open his own soon.
Will return to Canadian booth at
MEFEX '84.

APPENDIX

CONTACTS (Cont'd.)

Arabian Food Supplies
Geoffrey I. Walker
Regional Manager
P.O. Box 341
Al Khobar, Saudi Arabia
Tel: 894-6126
Tlx: 671125 AFS SJ

Handles a large variety of
grocery products, and fish
(store packs).

Mosaed Al-Mubarak
General Manager
Huraymala Co-operative Society
P.O. Box 8411
Riyadh, Saudi Arabia
Tel: 465-2936
Tlx: 204512 HRUMLA

Wanted prices on canned fish
products.

Fahad Ali A. Al-Bibi
Al-Bibi Company
P.O. Box 72
Dammam, Saudi Arabia
Tel: 832-3746
Tlx: 601153 ALBIBI SJ

Interested in importing tuna;
wanted prices, quantities.

Abdulla Oraibi
Al Maharah Traders
P.O. Box 20099
Manama, Bahrain, Arabian Gulf
Tel: 242644
Tlx: 9495 HAHARA BN

Interested in representing
companies and importing various
food products. Will be at
MEFEX '84.

Yahia A. Al-Hujailan
Kuwait Finance House
Trading Division, Consumer Goods
P.O. Box 24989
Safat-Kuwait
Tel: 431022
Tlx: BAITMAL 44742 KT

Interested in fish products.

Alawi A. Barakat
Deputy General Manager
Red Sea Trading & Shipping Est.
P.O. Box 648
Jeddah, Saudi Arabia
Tel: 642-6123
Tlx: 401057 REDSEA SJ

Interested in canned fish;
and possibly mackerel.

APPENDIX

CONTACTS (Cont'd.)

Martin J.P. Mitchell
Shipping Manager
American President Lines Ltd.
c/o Saudi Arabian Industrial &
Trading Est.
P.O. Box 2097
Dammam, Saudi Arabia
Tel: 883-1696
Tlx: 601367 SAITE SJ

Wanted names of Canadian west
coast fish processors, and
other exporters who may be
interested in sea transportation
to Saudi Arabia from Canada's
west coast.

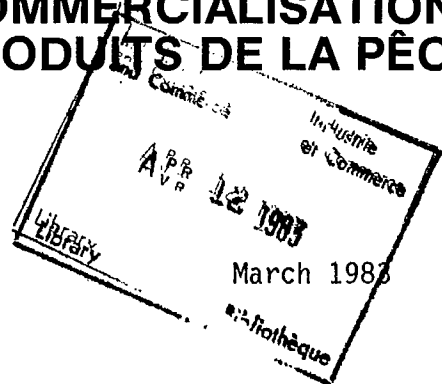
M. Saad Kershah
General Manager
DARI for International Trade
21 Damietta Street
Bulkeley, Alexandria, EGYPT
Tel: 848531

Wants to represent, as agent,
Canadian companies in Egypt.



FISHERY MARKET DEVELOPMENTS

COMMERCIALISATION DES PRODUITS DE LA PÊCHE



FMD No. 6

LOFOTEN COD FISHERIES

Following is a short report on the Norwegian Lofoten cod fisheries as prepared by the Commercial Division of the Canadian Embassy in Oslo.

"Cod fisheries at Lofoten had slow start this year caused by bad weather. As result at early stage Association of Fishermen pressed Min of Fisheries to be allowed to fish thru Easter. Situation has improved lately and expected that total catch this year will be approximately as last year. It will be decided soon if there will be fishing during Easter period. Latest available production figures we have been able to find re as follows: (Qty in Metric Tons)

	<u>1983</u> (up to 05 March)	<u>1982</u>	<u>1983</u> Versus <u>1982</u> Qty
Total	17,981	18,660	-679
Salting	6,425	10,077	-3,652
Drying	2,236	5,884	-3,648
Fresh	430	277	+153
Canning	66	29	+37
Round Frozen	213	64	+149
Saitfillets	2,081	1,970	+111
Frozen Fillets	6,530	360	+6,170

1,713 vessels are fishing this year compared to 1,524 last year.

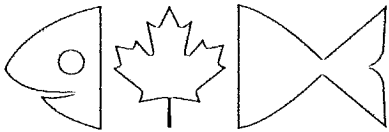
Portugal has now agreed to take 7,000 tonnes of salted fish and 3,000 tonnes of wet salted according to Min of Fisheries information.

Norway has allowed an increase of Portugals tac of redifsh (ocean perch) from 1,500 tonnes to 2,500 tonnes."

For additional information, please contact:

Louis Gaëtan
Fisheries Products Division
Food and Consumer Products
Industries Branch
Industry, Trade & Commerce and
Regional Economical Expansion
Ottawa, Ontario
K1A 0H5
(613) 593-4842

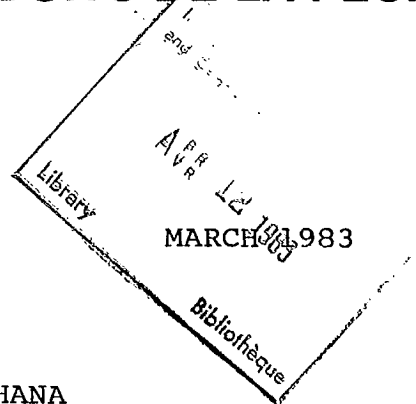
Aussi disponible en français



FISHERY MARKET
DEVELOPMENTS

COMMERCIALISATION DES
PRODUITS DE LA PÊCHE

FMD No. 5



FISH MARKET PROSPECTS - GHANA

The following was prepared based on information compiled by the Canadian Embassy in Accra, Ghana.

- Ghana is aiming at a 20% increase in fish catch this year with the long-term goal of self-sufficiency.
- Fish is not listed in the GNPA (Ghana National Procurement Agency) import program for 1983, and therefore is a very low priority when it comes to the allocation of foreign exchange. However, changes are made as the Governing Council permits.
- Ghana does have an infrastructure that permits distribution of frozen fish, so there is no barrier to frozen products.

The Ghanians want joint venture tuna boats, which they would pay for in tuna for export.

Should Canadians venture into Ghana, the Embassy Staff would be pleased to set up meetings.

It is thought there might be some difficulties exporting to private individuals since most industry is nationalized and buying is mostly done through the GNPA.

Here are statistics on production/imports planned for fish:

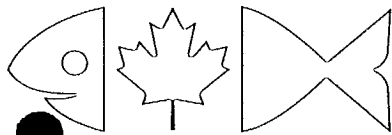
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FISH IMPORTS	COMMODITY	
	Mackerel/ Tuna	Sardines
Estimated annual requirement	1,500,000 Cartons	600,000 Cartons
Installed factory/domestic reduction	N/K	N/A
Extent possible factory/domestic production for 1983	20,000 Cartons	N/A
Shortfall in factory/domestic production	N/K	N/A
Approximate value of imports	N/K	N/A
Annual imports	700,000 Cartons	300,000 Cartons
Approximate cost of imports (U\$)	16.8M	10.5M
Present stocks and due in	NIL	NIL
Monthly consumption date	125,000 Cartons	50,000 Cartons
Expected exhaustion dates of current stocks	N/A	N/A
Quantities to be ordered now	700,000 Cartons	300,000 Cartons
Amount required for immediate imports (U\$)	16.8M	10.5M

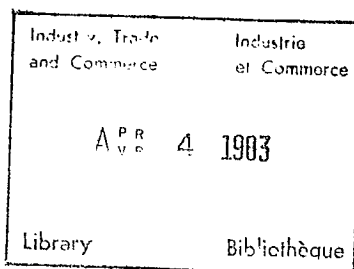
For further information, contact:

Eon Fraser
 Fishery Products Division
 Food & Consumer Products
 Industries Branch
 Dept. of Industry, Trade & Commerce
 and Regional Economic Expansion
 Ottawa, Ontario K1A 0H5
 (613) 593-4842

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FISHERY MARKET DEVELOPMENTS COMMERCIALISATION DES PRODUITS DE LA PÊCHE



FMD No. 4

March 1983

Australian Fish Market Report

The following are selected excerpts from a recently received report on the Australian fish market prepared by the Australian Department of Primary Industry and covering the months of November and December 1982, plus a summary for the year ending June 30, 1982.

Note that prices and values, unless stated otherwise, are in Australian dollars which were worth approximately \$1.20 during the period covered by this report. The Australian dollar has since been devalued and is currently quoted about \$1.05 Canadian.

Aussi disponible en français

For further information, contact:

Keith Torrie
Fishery Products Division
Food & Consumer Products
Industries Branch
Ottawa, Ontario
K1A 0H5
(613) 593-4842

Imports

Australia imported 2,205 tonnes of whole fish in the five months to November 1982. This was about one third less than for the same period in 1981 and some 55% less than in 1980; average unit values, however, were up by 28% on 1981 to \$1.93/kg. 77% of the total (or 1,707 tonnes) came from New Zealand (down 23%). Canada was second with 82 tonnes, a massive increase over 1981 levels but 59% less than in 1980. The United States and Canada were the only main suppliers to increase exports to Australia; both showed a fall in unit value.

Imports of fillets in the five months to November were 8,765 tonnes, 14% less than for the same period in 1981 and 9% less than in 1980. Frozen hake fillets were 3,416 tonnes (39% of the total), a fall of 27% over 1981 levels when it made up 46% of total fillet imports. The average unit value of fillet imports was up 8% to \$2.11/kg. New Zealand was the main supplier with 3,084 tonnes (marginally down on 1981 levels), followed by South Africa (2,842 tonnes, down 7%).

A total of 788 tonnes of fish fingers were imported into Australia in the five months to November, a fall of 24% compared with the same period in 1981/82. New Zealand (495 t) and South Africa (250 t) were the main suppliers.

Imports of fish blocks totalled 935 tonnes in the five months to November, 26% less than for the same period in 1981 and 2% less than in 1980. Average unit values were also down by 16% to \$2.11/kg; unit values declined 7% between 1980 and 1981, making the fall from 1980 to 1982 total 22%. Most fish blocks came from South Africa (332 tonnes, up 25%); the United States was second with 209 tonnes (up 8%). A total of 335 tonnes of mince blocks were imported into Australia in the same period.

CANNED FISH

Salmon

Australia imported 1,571 tonnes of canned salmon in the five months to November, 62% less than for the same period in 1981 and 41% less than in 1980. Average unit values fell 6% to \$4.10/kg despite a 55% increase in unit values for salmon from the USSR. The United States supplied 54% of the total (856 tonnes, down 60%) and the unit value of US-sourced salmon fell 17%. Canada was second main supplier with 450 tonnes (down 59%) while imports of New Zealand kahawai were up 27% to 177 tonnes.

The United States canned pack to 13 August 1982 for the State of Alaska and Washington reached 814,000 cases (48 x 6½ oz cans), 67% less than for the same time in 1981. The total pack is expected to be well below the high 1981 levels, although Alaskan landings to 21 August were 9% more at 224,574 tonnes (red salmon down 1%, pink up 9% and chum up 15%).

Australian wholesale prices for pink salmon fell 4% between December and February as supplies were abundant. Red salmon prices have increased 5% mainly in response to variations in the exchange rates.

Tuna

Australia imported 578 tonnes of tuna in the five months to November, 91% more than for the same period in 1981 but 48% less than in 1980. Average unit values fell 11% to \$2.74/kg. Thailand remained the main supplier with 248 tonnes or 43% of the total, up 307% over 1981; the second main supplier was Japan (175 tonnes, up 61%).

Other Canned Fish

A total of 1,868 tonnes of other canned fish were imported into Australia in the five months to November, 26% less than in 1980. Average unit values were up 16% to \$2.90/kg. Imports of all types of canned fish were down, notably sardines (26% down to 1,110 tonnes) and herring (16% down to 307 tonnes).

SMOKED FISH

Australia imported 1,541 tonnes of smoked fish in the five months to November, 39% more than for the same period in 1981 and 47% more than in 1980. South Africa continued to be the main supplier with 1,332 tonnes (up 48%), although imports from the United States were up 78% to 71 tonnes.

SHELLFISH

Crab

A total of 200 tonnes of crab were imported into Australia in the five months to November, 28% less than for the same period in 1981. Imports of frozen crab totalled 46 tonnes with an average unit value of \$12.13/kg, representing a 16% fall in quantity but a 174% rise in unit value. Canned crab imports were also down by 31% to 154 tonnes and the average unit value, at \$4.77/kg, was up 18%.

Table 2

Australian Imports of Marine Produce

	Year ended 30 June				
	1977-78	1978-79	1979-80	1980-81	1981-82
	<u>Quantity (tonnes)</u>				
FISH					
Whole fish					
Fresh or chilled		1,228	1,387	1,662	1,653
Frozen - hake	3,420	3,280	6,734	1,510	1,524
Other				6,829	4,251
Filletts					
Fresh or chilled	1,799	1,043	549	252	938
Frozen - hake	15,607	15,599	20,103	10,044	10,557
Other				12,528	12,572
Fingers or Sticks	5,338	5,117	6,276	3,525	2,100
Blocks	3,018	2,816	3,199	2,311	2,627
Other	118	246	389	289	1,124
Smoked, salted or dried					
Smoked - canned	1,970	106	53	63	68
Other		3,203	3,114	2,995	3,335
Other	1,055	1,092	1,011	981	1,070
Canned					
Herrings	1,178	1,048	796	1,213	995
Salmon	6,726	4,015	5,097	7,471	9,367
Sardines	3,244	2,559	2,771	3,458	2,979
Tuna	1,529	1,520	2,931	2,327	1,180
Anchovies	221	233	293	273	371
Mackerel	764	787	1,185	1,321	796
Other	1,006	471	772	524	708
Other	148	180	390	344	1,351
CRUSTACEANS & MOLLUSCS					
Fresh, chilled or frozen					
Prawns or shrimps	3,863	3,140	2,981	5,680	6,852
Lobster	165	101	194	508	417
Crab	102	120	49	207	89
Other	1,120	2,700	2,351	2,584	2,374
Canned					
Crab	224	231	340	429	445
Prawns or shrimps	570	884	919	592	612
Smoked molluscs	738	404	400	734	837
Other	724	4,102	3,080	466	549
Other	277	166	145	141	143

	Value (\$'000)				
FISH					
Whole fish					
Fresh or chilled	3,471	1,942	2,720	3,748	3,974
Frozen - hake		3,456	6,885	1,789	1,574
Other				7,813	6,465
Fillets					
Fresh or chilled	3,178	1,907	1,207	626	2,057
Frozen - hake	13,426	23,929	33,264	17,864	18,382
Other				25,161	28,515
Fingers or Sticks	9,919	10,164	12,362	6,665	4,790
Blocks	6,061	6,042	7,642	5,952	6,872
Other	146	322	592	494	2,660
Smoked, Salted or Dried					
Smoked - canned	4,477	295	204	353	363
other		6,396	6,213	6,791	3,475
Other	2,466	2,598	2,283	2,842	3,293
Canned					
Herrings	1,966	2,093	1,774	2,712	1,966
Salmon	22,203	13,812	20,051	30,081	40,172
Sardines	7,382	6,383	6,892	9,140	7,959
Tuna	3,507	3,013	7,699	6,761	3,618
Anchovies	962	819	1,320	1,302	1,817
Mackerel	970	903	1,322	1,755	1,126
Other	1,174	720	1,074	891	1,521
Other	347	642	1,075	1,301	4,152
CRUSTACEANS & MOLLUSCS					
Fresh, chilled or frozen					
Prawns or shrimps	36,964	16,948	19,009	33,781	4,167
Lobster	1,022	581	1,258	3,320	2,755
Crab	922	1,141	446	1,020	607
Other	3,250	11,636	8,222	7,427	6,565
Canned					
Crab	949	1,100	1,474	2,098	1,844
Prawns or shrimps	1,756	3,855	3,516	2,002	1,942
Smoked molluscs	2,673	1,596	1,462	2,748	3,318
Other	1,643	871	807	1,036	1,344
Other	1,284	1,182	2,033	1,478	1,646
TOTAL EDIBLE	140,950	124,346	152,806	188,951	168,939
Fish Meal	1,109	1,520	5,493	3,458	3,168
Marine Oil	533	705	437	441	375
Pearls	1,169	870	1,381	2,673	2,511
Other	2,079	1,879	2,354	2,540	3,060
GRAND TOTAL	145,840	129,320	162,471	198,064	178,053

Table 9

Imports of Chilled or Frozen Fish - by Principal Country

Whole Fish		Canada	Japan	New Zealand	South Africa	USA	Other	Total	
Year ended 30 June									
<u>Quantity (tonnes)</u>									
1977-78		12	157	2,769	23	11	448		3,420
1978-79		12	265	3,770	13	39	409		4,508
1979-80		80	448	6,218	679	4	691		8,121
1980-81		364	964	6,651	1,284	199	533		10,001
1981-82		36	341	5,032	1,306	..	713		7,428
<u>Unit Value (\$A/kg)</u>									
1977-78		1.10	1.14	1.00	0.57	0.78	1.10		1.02
1978-79		1.31	1.48	1.13	1.37	0.84	1.64		1.20
1979-80		1.40	1.57	1.10	1.14	4.43	1.63		1.18
1980-81		1.71	1.15	1.37	1.18	1.32	1.38		1.33
1981-82		2.81	1.55	1.79	0.96	4.61	1.59		1.62

Fillets		Chile	Japan	Korea	New Zealand	Singapore	South Africa	UK	Other	Total
Year ended 30 June										
<u>Quantity (tonnes)</u>										
1977-78		66	7,775	95	3,174	261	2,298	2,633	1,103	17,406
1978-79		213	6,682	341	3,167	213	2,888	1,530	1,409	16,642
1979-80		429	5,418	321	4,819	698	6,596	1,280	1,092	20,652
1980-81		2,957	5,499	1,180	5,177	287	5,692	752	1,279	22,824
1981-82		1,247	4,833	150	7,789	393	5,658	1,079	2,918	24,067
<u>Unit Value (\$A/kg)</u>										
1977-78		0.95	1.41	1.19	1.43	1.34	1.36	1.71	1.95	1.48
1978-79		1.26	1.57	1.24	1.55	1.35	1.39	1.84	1.73	1.56
1979-80		1.47	1.70	1.50	1.65	1.07	1.46	2.40	2.49	1.67
1980-81		1.60	1.93	1.47	2.22	2.51	1.68	2.55	2.24	1.91
1981-82		1.76	2.06	1.81	2.19	3.13	1.69	2.40	2.19	2.05

All data subject to rounding

Table 10

Imports of Fish Fingers and Fish Blocks - by Principal Country

Fish Fingers		Canada	Japan (a)	New Zealand	Norway	South Africa	UK	Other	Total	
Year Ended 30 June										
<u>Quantity (tonnes)</u>										
1977-78		71	-	29	1,182	2,594	1,433	30		5,338
1978-79		68	..	35	1,295	2,785	922	12		5,117
1979-80		32	4	435	1,164	4,020	620	1		6,276
1980-81		18	135	621	573	686	133	1,359		3,525
1981-82		18	745	554	119	397	2	265		2,100
<u>Unit Value (\$A/kg)</u>										
1977-78		1.66	-	1.51	1.72	1.65	2.37	2.00		1.86
1978-79		1.90	10.24	1.36	1.76	1.87	2.70	1.54		2.01
1979-80		2.12	4.00	1.16	1.85	1.88	3.00	3.43		1.97
1980-81		1.71	3.76	1.70	2.19	1.77	2.58	1.66		1.89
1981-82		2.01	3.19	1.65	1.99	1.82	2.44	1.88		2.28

Fish Blocks		Canada	FRG	Japan	New Zealand	Norway	South Africa	UK	USA	Other	Total
Year Ended 30 June											
<u>Quantity (tonnes)</u>											
1977-78		881	5	191	4	501	408	678	70	281	3,018
1978-79		984	48	133	9	521	323	546	143	106	2,816
1979-80		704	34	52	59	465	738	424	471	252	3,199
1980-81		87	27	136	115	399	784	149	292	322	2,311
1981-82		125	51	452	369	137	547	165	601	180	2,627
<u>Unit Value (\$A/kg)</u>											
1977-78		1.47	4.57	2.55	1.27	2.26	2.02	2.20	2.39	2.26	2.01
1978-79		1.65	2.55	2.22	1.78	2.31	2.21	2.68	2.04	2.86	2.15
1979-80		1.96	3.66	2.21	1.60	2.43	2.06	3.84	2.06	2.67	2.39
1980-81		4.51	2.71	3.09	1.37	2.52	1.81	7.23	3.36	1.31	2.58
1981-82		4.13	3.40	3.10	1.77	2.68	2.15	2.70	2.65	3.03	2.62

All data subject to counting

Table 13

Imports of Canned Fish - by Principal Country and Species

<u>Tuna</u>								
Year Ended 30 June	Taiwan	Japan	New Zealand	Philippines	Thailand	Other	Total	
<u>Quantity (tonnes)</u>								
1977-78	171	788	-	203	215	151	1,529	
1978-79	152	387	..	630	299	53	1,520	
1979-80	181	689	249	805	1,002	25	2,931	
1980-81	142	429	544	597	600	15	2,327	
1981-82	107	500	183	16	345	30	1,180	
<u>Unit Value (\$A/kg)</u>								
1977-78	2.13	2.49	-	1.99	1.99	2.28	2.29	
1978-79	2.14	2.53	1.39	1.61	1.90	2.42	1.98	
1979-80	3.15	3.19	2.40	2.01	2.67	4.04	2.63	
1980-81	2.88	3.60	2.91	2.48	2.83	2.93	2.91	
1981-82	2.81	3.26	3.66	2.94	2.56	2.94	3.07	
<u>Salmon</u>								
Year ended 30 June	Korea	Canada	Japan	New Zealand(a)	USA	USSR	Other	Total
<u>Quantity (tonnes)</u>								
1977-78	-	2,758	1,333	-	2,274	337	24	6,726
1978-79	-	1,409	178	8	2,075	285	60	4,015
1979-80	-	1,068	26	275	3,333	367	27	5,097
1980-81	41	1,338	44	468	5,205	349	25	7,471
1981-82	275	3,635	644	235	4,358	199	21	9,367
<u>Unit Value (\$A/kg)</u>								
1977-78	-	3.40	3.00	-	3.37	2.83	9.00	3.30
1978-79	-	3.91	3.52	0.54	3.20	2.58	5.00	3.44
1979-80	-	4.78	2.80	1.31	3.96	2.93	9.10	3.93
1980-81	3.43	4.94	4.06	1.55	4.07	2.95	8.75	4.03
1981-82	3.29	4.79	4.31	1.66	4.09	3.55	7.04	4.29
<u>Other</u>								
Year ended 30 June	Canada (b)	Japan (c)	Norway (c)	Spain (d)	UK (c)	Other	Total	
<u>Quantity (tonnes)</u>								
1977-78	801	1,214	9	326	1,481	2,582	6,413	
1978-79	711	657	999	301	1,132	1,298	5,099	
1979-80	988	1,590	837	205	509	1,686	5,816	
1980-81	1,050	1,730	790	263	904	2,052	6,790	
1981-82	691	946	581	316	616	2,698	5,849	
<u>Unit Value (\$A/kg)</u>								
1977-78	1.48	1.08	3.11	3.29	2.08	2.23	1.94	
1978-79	1.82	1.00	3.07	2.97	2.29	1.86	2.14	
1979-80	2.20	1.07	3.39	4.67	3.04	1.87	2.13	
1980-81	2.27	1.20	4.17	4.05	3.40	1.90	2.33	
1981-82	2.88	1.50	4.47	4.24	3.01	1.92	2.46	

All data subject to rounding

- (a) Australian salmon or kahawai
 (b) Mainly herring and sardines
 (c) Mainly sardines
 (d) Mainly anchovies

Table 17

Imports of Smoked Fish (excl. Canned) - By Principal Country

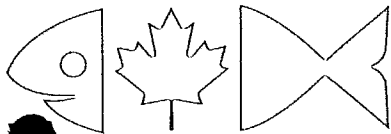
Year ended 30 June	Canada	Netherlands	Sth Africa	U.K.	U.S.A.	Other	Total
<u>Quantity (tonnes)</u>							
1977-78	55	60	1,059	333	35	428	1,970
1978-79	82	45	2,442	401	61	357	3,388
1979-80	100	35	2,525	125	42	288	3,114
1980-81	60	46	2,548	172	64	106	2,995
1981-82	98	58	2,737	148	60	233	3,335
<u>Unit Value (\$/kg)</u>							
1977-78	8.59	2.17	1.51	2.00	11.57	2.83	2.27
1978-79	7.31	2.74	1.54	2.18	6.92	2.76	2.00
1979-80	7.95	3.11	1.50	2.69	10.62	2.56	2.00
1980-81	9.76	2.32	1.66	3.25	12.51	4.76	2.27
1981-82	11.84	2.10	1.81	2.57	13.61	4.41	2.54

All data subject to rounding.

Table 18

Average Imported Smoked Cod (Hake) Prices
Primary Wholesale Prices (\$/kg)

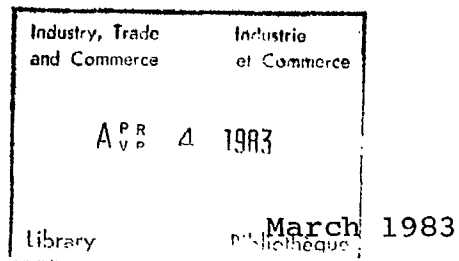
	4-7 oz	7-14 oz	14-20 oz	20 + oz
1981 - October 30	2.05	2.18	2.34	2.40
November 30	2.20	2.38	2.41	2.52
1982 - January 28	2.25	2.38	2.47	2.53
March 31	2.24	2.49	2.58	2.60
June 7	2.30	2.48	2.58	no quote
September 1	2.45	2.60	2.65	no quote
November 1	2.36	2.52	2.48	no quote
December 1	2.33	2.51	2.52	no quote



FISHERY MARKET
DEVELOPMENTS

COMMERCIALISATION DES
PRODUITS DE LA PÊCHE

FMD No. 3



Attached is a copy of the 1982 year end report on the Japanese Fish Product Market as prepared by the staff of the Canadian Embassy in Tokyo.

Aussi disponible en français

Att.

For further information, contact:

K.M. Torrie
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Canada

SITUATION REPORT: FISHERIES - JAPAN

Summary

Landings at major fishing ports in 1982 increased 4 percent over 1981 and new record is projected for total catch. Prices continue firm. Imports also set new record with increase of 6.5 percent in volume and 19 percent in value. Prospects are favourable for good Canadian sales of salmon, salmon roe, herring roe, food herring, squid, black cod, crab and capelin during 1983. Following sections provide details, general industry performance and review situation for selected species/products of interest to Canada.

Overview

1982 landings at 66 major fishing ports increased 4 percent over 1981. Projections indicate 1982 catch will total record of approximately 11.7 million MT and may reach 11.8 million when complete results are tabulated. This represents increase of at least 400,000 MT over 1981 (previous high) and gain of more than 1.0 million tonnes over 1979. Average landing prices have also increased to Yen 165 from Yen 160 in 1981. Volume of imports, which recorded substantial year-to-year gains in third and fourth quarters, totalled 1,202.8 thousand MT for gain of 6.5 percent over 1981 imports of 1,129.1 thousand tonnes. Value of imports rose by 19 percent from Yen 879,881 million (approximately \$4.8 billion Canadian) in 1981 to Yen 1,046,730 million (approximately \$5.2 billion) in 1982, and average value/kg also rose from Yen 779 to Yen 870 as previously reported. Much of increased value is traceable to weakening of Yen against USA Dollar with exchange rates in 1982 ranging from Yen 216 to 275 to dollar (approximately 245 at year-end) compared to Yen 196 to 216 range in 1981 (note dollar increase equivalent to 8.3 percent). Comparative import results by major categories are as follows:

UNIT - VOLUME: Thousand MT. VALUE: 1,000 Million YEN

	<u>Volume</u>	<u>Value</u>	<u>Volume</u>	<u>Value</u>
Live	14.1	27.4	22.0	32.0
Fresh/Frozen	933.4	837.2	876.6	680.6
Salted/Dried/Smoked	41.6	87.9	39.6	80.4
Prepared/Preserved	43.6	53.8	43.3	41.0
Others	109.7	39.5	147.6	45.9
Total	1,202.9	1,046.7	1,129.1	879.9

Salmon

Forecasts of increased catches during autumn salmon fishery (roe salmon) in Hokkaido and northern mainland failed to materialize and actual catch terminated below 100,000 MT, decline of approximately 12 percent from 1981 catch of 110,000 MT. Imports of fresh/frozen salmon in 1982 totalled 107,723 MT., highest in the history (93,268 U.S.A., 10,834 Cda., 1,501 N/Korea, 1,357 S/Korea and 645 USSR).

Trade estimates that imports of sockeye were approximately 60,000 MT, but strong purchases of all other species were also made. Low catch led to substantial price increase for all salmon products toward peak year-end consumption period. However, generally high prices encountered consumer resistance and sales were relatively slow toward year-end. As a result, prices of all salmon products have decreased substantially since January 1. Current (February-end) prices at Tokyo market are: sockeye (size 4-6)-semi-dressed Yen 1,150-1,250/kg, fully-dressed Yen 1,200-1,300, coho 1,000-1,050/kg; chum 950-1,000/kg; and pink approximately 700/kg. Good quality salted sockeye (Alaska/Canada) is Yen 1,300-1,600/kg.

Salmon Roe

1982 imports of salmon roe - 9,637 MT (8,596 U.S.A. 982 Canada). Decrease of 1,100 MT from 1981 imports. Early forecasts of record supplies of autumn roe salmon resulted in price reductions and created strong demand with most of domestic roe production in northern Japan going to ikura manufacturing. With realization that poor catch was imminent, prices again increased and demand slowed; however, on annual basis, sales of salmon roe were relatively good. Current price in Tokyo market is Yen 3,500-3,700 per kg for grade one chum roe; roes of most other species are now almost sold out and seldom quoted at market.

Herring Roe

1982 imports of salted herring roe - 7,497 MT (4,722 Canada, 1,501 U.S.A., 731 S/Korea, 399 PRChina). As previously reported, trade estimates total supply of herring roe in 1982 was 10,200 MT, comprising 7,500 MT imported roe, 2,200 MT from imported roe herring (approximately 23-24,000 MT) and 500 MT roe carried over from 1981. Weakness of Yen against foreign currencies in 1982 led to high CIF cost and wholesale price was Yen 800-1,000/kg higher than in 1981.

Wholesale prices rose during first week of December 1982, especially in Osaka-Kyoto area. However, some consumer resistance developed and prices declined toward end of year. At Tokyo market, prices peaked on December 9 at 7,100-7,600/kg for large size roe and declined by

Yen 6,500-7,100 on December 25. Inventory carry-over at year end was approximately 1,000 MT, including 200-300 MT held by processors and 700-900 in distribution channels including retailers. Current wholesale price (out of season) in Tokyo market is Yen 5,500-6,000 kg for large size. Roe herring fishery in San Francisco Bay which started December 1982, has been disturbed by strong bidding by Korean traders and, as result, many traditional Japanese traders have stopped bidding. It is reported that almost 8,000 of 12,000 short ton fishing quota has been purchased by Korean traders at U.S. dollar 1,650/ton for gill-netted roe herring. Japanese traders are now concerned that if similar higher prices are demanded for Canadian herring roe, resultant price increases in Japan could again generate consumer resistance and lead to repetition of 1980 market collapse.

Herring Roe on Kelp

1982 imports - 462 MT (180 Cda. 282 U.S.A.). Sales resistance continues against high prices caused by new buyers who bid up prices. However, demand for high quality Canadian products has been better than for lower grade Alaska products. Wholesale price in outside Tokyo market for restaurant chains, which rose to Yen 8,500-9,000 Kg for first grade product, has declined to current level of Yen 8,000/kg.

Food Herring

Domestic catches of spring herring off Hokkaido and autumn herring in East China Sea were very good. 1982 landings at major ports totalled 18,038 Yen, 67 percent over 1981 which projected to national basis, indicates total catch should exceed 30,000 MT. As catch in Hokkaido is primarily young herring without roe and too small for fresh trade, all are being processed. Herring caught in East China Sea (estimated at 10,000 MT) are usually frozen-on-board and defrosted by wholesalers for fresh trade. 1982 imports of frozen herring were 59,918 MT (30,973 U.S.A. - including 23,000 MT of roe herring from Alaska, 23,141 Cda, 2,632 Netherlands, 1,769 U.S.S.R., 503 N. Korea). Volume represents increase of nearly 9,000 MT over 1981 volume of 50,118 MT in aggregate. Supplies for processing (including carcasses from imported roe herring) are abundant. Supply of food herring for fresh trade has also increased, but is matched by strong demand because of shortage of other green fish species (i.e. mackerel, saury, etc.) Good size Canadian herring have been featured on regular menus of restaurants in Eastern-Northern Japan and demand for Canadian herring can be expected to increase in 1983 and beyond.

Squid

1982 Squid catch was generally poor and may not exceed 500,000 MT, vs. 516,000 MT in 1981 and 688,600 MT in 1980. Common squid fishery was less than 200,000 MT (196,830 MT in 1981), and red squid totalled approximately 140,000 MT product weight equivalent to approximately 180,000 MT round weight. Although current winter squid fishery is reported as very good due to warmer water in Sea of Japan, large tonnage of catch cannot be expected. Combined imports of squid and cuttlefish in 1982 totalled 96,400 MT for increase of approximately 28,000 MT over 1981 (68,776 MT) volume is mostly cuttlefish with some loligo. Imports of squid equivalent to Canadian *Illex* amounted to approximately 35,000 MT (11,433 Poland, 9,444 Argentina, 2,840 New Zealand, 705 Canada, plus estimated 6,500 S/Korea, 2,000 Spain, 1,800 USA).

Prices of all squid species, which decreased in summer months in anticipation of good catch, reversed direction around end of August 1982 and have remained strong. Largest increases have been recorded by smaller-size squid which are in short supply and commanding premiums over larger squid which are relatively abundant. Higher prices have resulted in slow sales but, as no supply recovery is expected until mid-summer at earliest, prices are expected to remain at present levels. Current prices of frozen common squid at Tokyo market are Yen 4,200/case of 7.5 kg containing 16-20 squid; Yen 4,300-4,500 for 21-25 size; Yen 4,300-4,500 for 26-30 size. New Zealand squid fishery by Japanese jiggers and trawlers commenced December 1982 with 103 jiggers participating an increase of 20 vessels over last year. Fishery is reported to have been very good in early part of season, but then declined as season progressed. Catch is reported at approximately 16,000 MT as of January 31, 1983. First supplies arrived Hochinohe Port February 4, 1983 and auction prices at landing were very good, especially for smaller size (41-45 squid per case) which realized Yen 3,700/case of 8.5 kg. However, prices have since been declining as additional shipments arrive.

Black Cod

Due to U.S.A. fishing restrictions, black cod continues to be in short supply. Prices are unchanged since last report, i.e. dressed/frozen on board, domestic and imported, quoted Tokyo fish market at Yen 900/kg size 4-6 fish/case of 12 kgs; Yen 850-860 size 7-8; Yen 650-670 size 9-10 and Yen 500-530 size 11-15. High quality Canadian products often realized Yen 1,050/kg. Details re: imports not available as product not reported separately. However, imports from Canada estimated at approximately 3,000 MT in 1982. Demand for Canada and U.S.A. products expected to be strong throughout 1983 season.

Capelin

1982 imports of capelin totalled 33,966 MT (15,228 Norway, 14,493 Canada, 3,292 U.S.S.R. - unsorted, 952 Iceland). Volume exceeded demand and as result year end carryover estimated at 5,000 MT (almost all Canadian product). This stock, plus prospects for increased catches by Norway (20,000 MT female) and Canada has led trade to conclude that oversupply situation is probable. As a result, price negotiations with Norway have now been delayed by nearly three months. Risk of oversupply appears to have diminished slightly with reports of poor fishing conditions in the major (northern) Norwegian fishing ground and poor quality of catch (low roe, red feed, etc.) However, despite these developments, one of three Norse exporter groups recently contracted for 100 percent female with roe, and count of less than 50/kg, at U.S.A. Dlr. 1275/MT. This is reduction of Dlrs. 100 from 1982 price. Capelin roe is reported to have been contracted by one group at U.S.A. Dlrs. 2,100/MT fob, substantially above Dlrs. 1,750 in 1982. However, many traders refuse to believe this report and are refusing to buy.

Crab Sections

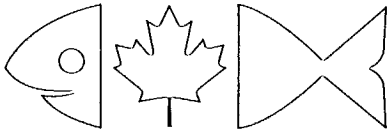
Imports of crab declined from 33,075 MT in 1981 to 23,394 MT in 1982 (11,814 U.S.A., 4,572 Canada, 2,894 S/Korea, 2,524 PR China, 940 U.S.S.R.) Imports from U.S.A. in 1982 comprise 800 MT king, 400 MT "kegani" (horsehair crab), 5,500 "bairdi" and 4,500 "opilio". Canadian products included 700 MT of claws, 2,500 of fresh/frozen and 2,300 of boiled/frozen. Short supply and resultant high prices (50 percent increase) has led to dramatic reduction in demand. Thus, despite reduced imports, trade estimated year-end inventory carryover at more than 5,000 MT including 4,000 from U.S.A. and 1,000 from Canada. Much of latter is reported to be black spotted. Apart from this questionable stock, Canadian queen crab continues to sell well throughout year. Prices of larger size Canadian products in 1982 were U.S.A. Dollar 1,80-1.90 per lb. fob for fresh/frozen and 2.00/lb. for boiled/frozen.

Prospects

1983 snow crab (bairdi) fishery has commenced in Alaska but Japanese buying intentions are slow and traders are adopting a wait and see attitude. Current price quotations offered from American exporters average U.S.A. Dollar 3.00/lb. for bairdi, more than 20 percent lower than in 1982. However, Japanese are looking for less than U.S.A. Dlr. 2.70/lb. Demand for Canadian tanner is relatively strong and importers expect to purchase 6,000-7,000 MT in 1983. However, importers can expect severe pressure for price reductions.

Northern Shrimp

1982 imports of northern shrimp estimated at 5,447 MT; (2,684 Norway, 1,656 Denmark, 551 Canada, 355 U.S.S.R., 201 Greenland). This represents increase of 3,000 MT from 1981 imports of 8,300 MT, which were excessive. Current demand is good and sales are steady; however, Canadian exporters have to compete with Norway and Danish products in quality, and proper sizing. Wholesale prices in Tokyo area for Canadian fresh/frozen 5 kgs block pack are Yen 1,100/kg for 50-70 count and Yen 750/kg for 90-120 count. Kgs block packs are Yen 1,200/kg for 50-70 and Yen 900/kg for 90-120.



**FISHERY MARKET
DEVELOPMENTS**

**COMMERCIALISATION DES
PRODUITS DE LA PÊCHE**

FMD NO. 19

DECEMBER 1982

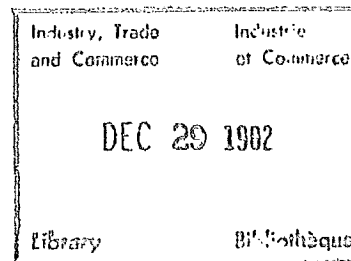
CAMEROON MARKET REPORT

Attached is a report from data developed by the Industry, Trade and Commerce staff at the Canadian Embassy in Yaoundé.

Att.

For further information
please contact:

Eon Fraser
(613)995-8107



Aussi disponible en français

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Appendix B

Customs Tariffs

Appendix C

List of Fish Companies

Appendix D

Wholesale Market Price List by Species
Movement of Import Prices - fresh, frozen, salted, canned
Import Developments - fresh, frozen, salted, canned
Import Summary Table

THE CAMEROON MARKET FOR FISHERY PRODUCTS

The Cameroons

The Cameroons fish market is supplied 50 per cent from domestic catches and 50 per cent from imports. Current consumption is 40,000 tonnes (stable from 1975 to 1981). The total local production has remained at about 20,000 tonnes while imports have risen from 20,000 tonnes from 8,046 tonnes. Almost all local production is consumed fresh. Local production of frozen product went from 4,348/tonnes in 1975-76 to zero in 1978-79. Local production of shrimps has fallen during those same years to 500/tonnes in 1980-81 from 1,539 t in 1975-76.

Species Consumed

The "noble" fish, consumed by the urban elites and expatriates are almost all local species, some of which can be found in U.S. waters but not in Canadian (jack crevalle, tuna, croakers, groupers). The other fish, mackerel, jack mackerel, and "fritures", are sold at prices affordable by the majority of people, and represent 70 to 80 per cent of sales of local companies. A list of species consumed appears in Appendix A. There is a slow-down in local production during the rainy season (between April and September at Douala), so imports would be in the strongest demand at this time particularly for frozens. During the dry season the tendency is reversed.

The best potential is probably stockfish and salted fish. See Appendix A.

Customs duties:

Tables of customs duties applying fish imported into the Cameroons appear in Appendix "B".

Prices:

There is a large gap between the "authorized" price and the actual price in the market, but the price of fish remains lower than pork, chicken, beef or goat.

These are as follows:

Prices, Local Production

	<u>Price/KG/CFA</u>
Boneless beef	1100 - 1200 CFA
Beef fillet	1400 CFA
Beef (bone-in)	900 - 1000 CFA
Chicken	1500 - 2000 CFA
Pork	1500 CFA
Sea Bream	420/kg (large wholesaler in Douala)
Croakers	375/kg

Import prices vary according to exporting country, the best being offered by the Soviet Union which supplies more than 80% of mackerel and horse mackerel and 60% of all fish. The highest prices are those of the French. Spain now supplies 38% of imports: Norway is shown as 1980's only stockfish supplier with 46 tonnes.

Markets and distribution

Between 1979 and 1981 fresh fish imports jumped 56% in value and 15% in volume.

Exports

The Cameroons export fish to 10 countries. But they have been falling off to all countries except Spain. Shrimp dived 38% in 1978-79 in spite of three more vessels being added to the 20-boat shrimp fleet.

	1980	1979
USA	122	397
Spain	77	57
France	24	41
Gabon	16	-
Japan	7.5	218
RCA	1.2	-
Belgium	.066	58
Nigeria	.030	-
Holland	-	132
Tchad	-	1.5
	<hr/> 248	<hr/> 929

Distribution

There are three main groups of operators. The first group is formed of 8 fish companies specializing in supplying the fresh fish market. The second group, with five importing companies, control the frozen fish distribution.

Group One*

Group Two*

Fresh Fish (All in Douala)

Frozens

CREVCAM

La Société Camerounaise des produits de mer (SCPM)

PECAM

La Constante Cameroon Fishing Industrie (CCFI)

COTONNEC

SOPAC

La Société Camerounaise de Pêche (SOCADep)

ATLANTIC

La Poissonerie Populaire

CHALUTCAM

La Société Dikabo et Fils

CFFISHTRACO

La Poissonerie de l'entente

COPEMAR

Les Ets. Tchatchou

Group Three*: All the other companies which specialize in importing foodstuffs and who supply the canned fish outlets.

Besides these three groups there are some 20 wholesalers who supply the necessary infrastructure for frozen and fresh fish distribution; their reefer trucks, walk-in freezers, etc., are situated throughout the country. These sell to sub-wholesalers who, in turn, resell to the street vendors.

*The companies' names, addresses, and contacts appear in Appendix C.

Who Eats What

Consumer Group I (17% of population; 1,316,700 people)

Type of fish consumed

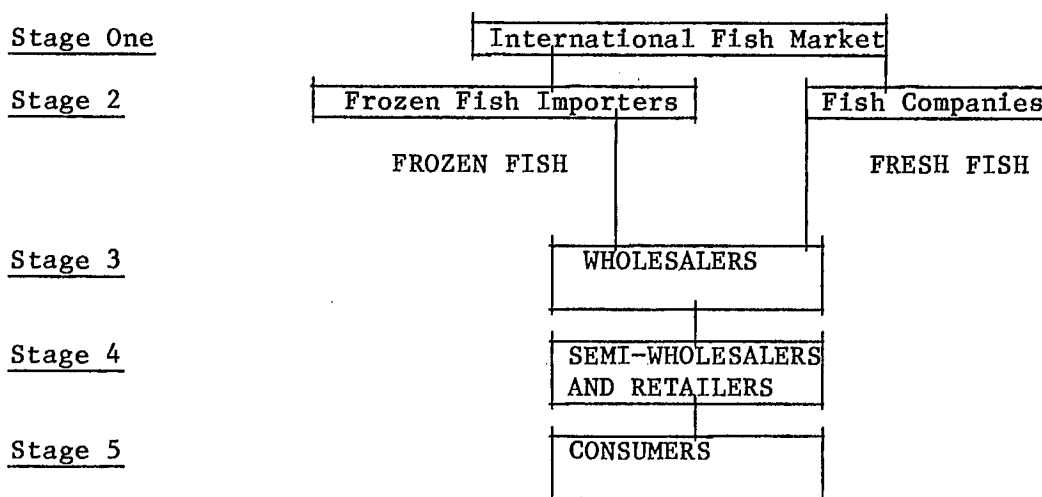
Medium to high income families
Expatriates
European type Restaurants

"Noble fish", shrimp, shellfish,
canned fish other than sardines,
stockfish and saltfish

Group II (83% of total population, 6,383,300 people)

	<u>Type of fish consumed</u>
Families with modest incomes (40% of urban population)	Mackerel Horse mackerel "Fritures"
Rural population (71.5% of total)	Canned sardines in oil Locally smoked fish

Distribution Network



- Stage 1: Dominated by the Soviets who practise "dumping"
- Stage 2: Frozen fish importers are too few and are all situated in Douala. With electrification, the opportunity would be good for growth throughout, particularly the west and southwest of the country with their heavy populations and higher incomes.
- Stage 3: The wholesalers are also too few and only cover a quarter of the country. However the number is growing because of new market pressures for canned fish and stockfish .
- Stage 4: These hike fish prices because they are not easily controlled. They are in two groups, those with modern facilities with cold rooms, etc., and who sell "noble" fish, and those who are street vendors.
- Stage 5: The consumer pays more than he should because of the Group 4 mark-up.

The distribution infrastructure: Logistics and costs

Satisfactory distribution of fish occurs only in the immediate areas of Douala, Yaoundé, Nkongsamba, Bafoussain and Victoria: along the main roads or railroads.

Refrigerated warehousing is limited to large cities and, of course, occurs only where electricity is available. A rural electrification program is underway, aided by Canada.

The current consumption of 45,000 tonnes of fresh and frozen fish should benefit in the medium term from this program and from the growing number of reefered railcars going to Yaoundé and Nkongsamba and reefered trucks to other centres. The Cameroon's 5th plan foresees the creation of a national chain of refrigeration facilities for fish products. The Post reports this has a good chance of being realized. However current distribution costs have suffered from the rise in gasoline prices and successive wage increases in the past few years.

Some General Problems

The Cameroon fisheries sector is in a difficult position because:

1. Costs have soared because of the quadrupling of gasoline prices.
2. The market price of fish is limited by government decree.
3. National fisheries companies suffer from competition from the Soviets who sell at "dumping" prices.
4. Fresh fish sales in the interior suffer because of the current lack of infrastructure (which is in turn dependent on electrification).
5. The Cameroon fleet is old and its productivity is low.

To solve some of these problems the fishermen's unions and importers' associations have asked the government to stop taxing imports of diesel oil and parts; to authorize fishing on the Cameroon's continental shelf; to liberalize its controls on prices of fish on the market; and to revise the customs duties on fish imports. These points are now being closely studied.

Fishery Regulations

There are no special regulations regarding fish imports, an importer, to start importing, needs only the go ahead from the Ministry of Fisheries and the Economic Ministry, and a licence.

For exports there are no restrictions but it is not permitted to re-export fish which have been imported. All must be sold on the Cameroons market.

Interests in Canada expressed

A number of importers have expressed interest in the eventual participation of Canada in fish and fish marketing.

In fisheries, COPEMAR wants to obtain a licence to fish in Canadian waters.

Importers of interest to Canadian suppliers are:

SOCADEP (research on Canadian salmon)
Poissonnerie populaire
ETS. TCHATCHOU
SCPM

They are not interested in Canadian suppliers, providing prices are competitive and deliveries regular. The market outlook is good for fish and seafood, particularly for frozen products.

Recommendations for Canadian Exporters

1. Work with local firms with local capital to set up a new firm with modern equipment. Such a company should be feasible in the short or medium term.
2. That Canadian seafood exporting companies work through
"La Poissonnerie Populaire"
"La Poissonnerie de l'Entente"
"Les Etablissements Tchatchou"
3. Canadians could participate in the creation of a national cold storage network.
4. Canadians should be able to sell salmon which seems to be popular in restaurants.
5. Among importers of canned fish, the following are long established and financially stable

Etablissements Monthe Paul, P.O. Box 726 Douala
Codima, P.O. Box 477, Douala
Kayo Elie, P.O. Box 841, Douala
Despotakis frères, P.O. Box 141, Yaoundé
Supercam, P.O. Box 5375, Douala
Dabadji et Cie, P.O. Box 69, Ngaoundéré

Maison T. Bella, P.O. Box 563, Yaoundé
 Ngankeu Pierre, P.O. Box 2390, Yaoundé
 Cie Soudanaise, P.O. Box 84, Yaoundé

6. The Post suggests the Cameroon be given a high priority in Canadian marketing efforts.

Between 1979 and 1981, imports of fresh saltwater products increased by almost 56% in value and approximately 15% in quantity.

- b) Importation of canned fish, crustaceans and molluscs.

TABLE SHOWING DEVELOPMENTS IN IMPORTS OF CANNED FISH,
CRUSTACEANS AND MOLLUSCS

DESCRIPTION	QUANTITIES (TONNES)			VALUE (000 CFA)			COUNTRY OF ORIGIN
	1979	1980	1981	1979	1980	1981	
CANNED SALMONIDS	12	19.7	8.7	4422	5984	3078	
CANNED SARDINES	2306	1354	1405.9	249660	237032	244384	FRANCE, NIGERIA, MOROCCO, SPAIN, SWEDEN, YUGOSLAVIA
CANNED FISH, OTHER	257.4	351.1	762.7	89008	87380	249777	IDEM
OTHER CANNED FISH, PREPARED	16.1	17.9	60.9	9623	10622	16767	FRG, CANADA, CHINA, NORWAY, FRANCE, SWEDEN
CRUSTACEANS, PREPARED OR PRESERVED	2	4.6	11.3	1812	5544	11209	CANADA, THAILAND, FRANCE, CHINA, USSR
MOLLUSCS, PREPARED OR PRESERVED	2.9	4.3	5.1	3711	5792	5738	IDEM
OTHER	---	---	---	20	40		
TOTAL	2596.4	1751.6	2254	358256	352400	530953	

The quantities of canned fish imports have remained unchanged over the past three years.

APPENDIX A

Fish Markets - The Cameroons

Fish Products, fresh or frozen (species)

There are 28 fish species on the market in the Cameroons fresh or frozen products plus stockfish and salted fish.

- Bars (Bass)
- "Nylons"
- Soles grandes (Sole, large)
- Machoirons (Jawfish)
- Daurades (Sea Bream)
- Bossu gros (Humpback, large)
- Bossus moyens (humpback)
- Congres (Large eels)
- Brochets (Pike or snoek)
- "Disques"
- Ombrines (Croakers)
- Caranques (Jack Crevalle)
- "Plates"
- "Fritures"
- Soles petites (Sole)
- Raies petites (Ray)
- Requins (Shark)
- Roussettes (Brown cat shark)
- Crevettes grosses (shrimp, large)
- Crevettes petites (shrimp, small)
- Langoustes (Crayfish)
- Crabes (Crab)
- Seiches (Cuttlefish)
- "Diners"
- Saumons (Salmon)
- Thon et sardinelles (Tuna and Sardines)
- Chienchard (Horse Mackerel)
- Maquereau (Mackerel)
- Stockfish*
- Salted Fish**

*Stockfish: Exports from Norway to Cameroons January to September 1982 were as follows:

Cameroon	Split Cod	11.5	23.2
	Finnmark Cod	.9	9.9
	Other Cod	1.5	135.6
	Other	22.5	97.2
		<u>36.4</u>	<u>265.9</u>

**Dried Salted Fish (from Norway)

1981 Saithe 156 tonnes @ C\$ 2.40/KG

1982 (Jan-Sept) Saithe 21.6 tonnes @ C\$ 2.55/KG

Of these 28 few can be supplied from Canadian waters, some others could be substituted by a similar species if market prices warranted.

Directly marketable

Substitutable

Mackerel
Shark

Sardinella

Jack mackerel

Rock lobster

Stockfish

Cuttlefish

Salted fish

Seabream

Salmon

Pike or Snoek

Tuna

Croakers

Crab

Jack cravelle

Sole (small or large)

Pompano

Rays (small)

Sea bass

Shrimp (small or large)

CUSTOMS TARIFFS

TABLE 5 - CUSTOMS NOMENCLATURE

	DESCRIPTION	DUTIES AND AUTONOMOUS DUTY RATES - CACEU		
		Customs duty	Import duty	Autonomous duty rates
1-	Fish, fresh (live or dead), chilled or frozen			
	- Freshwater	7.5%	10%	NT
	- Saltwater			
	- Fresh tunny and small sardines	10%	10%	NT
	- Other	7.5%	15%	NT
2-	Fish, dried, salted or in brine; smoked fish whether or not cooked before or during the smoking process			
	- Herring	7.5%	15%	NT
	- Cod and halibut			
	- Fillets	7.5%	15%	NT
	- Stockfish	7.5%	2%	NT
	- Klipfish	7.5%	2%	NT
	- Other	7.5%	15%	NT
	- Sardines	7.5%	15%	NT
	- Other			
	- In cases or boxes	7.5%	15%	NT
	- Other presentation	15%	Free	NT
3-	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:			
	- Crustaceans			
	- Saltwater	7.5%	30%	NT
	- Other (crayfish, etc.)	7.5%	30%	NT
	- Molluscs			
	- Saltwater	7.5%	30%	NT
	- Other (snails)	7.5%	30%	NT

Other duties which may apply to fish, crustacean and mollusc importations and should be added to these customs duties include:

1- Special Duty

- . Other products of animal origin (including fish 30%)
- . Meat and fish preparations 50%

2- Veterinary Inspection Fee

- . Fish, crustaceans and molluscs, fresh or frozen:
3% ad valorem
- . Canned fish, crustaceans and molluscs:
2% ad valorem

3- Additional Duty

- . Canned sardines: 20%
- . Canned fish, other: 10%
- . Prepared for preserved crustaceans: 10%

The rates of duty for the other saltwater products is as follows:

TABLE 6 - ADDITIONAL DUTIES FOR FRESH OR PREPARED

SALWATER PRODUCTS

DESCRIPTION	PERCENTAGE
1- Freshwater fish	5%
2- Fresh tunny and small sardines	5%
3- Other saltwater fish	5%
4- Herring	-
5- Cod, fillets	-
6- Stockfish (fillets or other)	20%
7- Klipfish (fillets or other)	20%
8- Cod, other	20%
9- Sardines	-
10- Other fish, salted, in cases or boxes	-
11- Other fish, salted, other presentation	-
12- Saltwater crustaceans	-
13- Crustaceans, other	-
14- Saltwater molluscs	5%
15- Molluscs, other	-

CUSTOMS DUTIES - FOOD INDUSTRY PRODUCTS

DUTIES ON FISH, CRUSTACEAN AND MOLLUSC PREPARATIONS

	DESCRIPTION	DUTIES AND AUTONOMOUS DUTY RATES - CACEU		
		Customs duty	Import duty	Autonomous duty rates
1-	Extract and juice of fish	10%	20%	NT
2-	Fish preparations and canned fish including caviar and its substitutes			
	- Caviar and other substitutes presented	10%	35%	
	1- - In hermetically sealed containers, in boxes, glass containers, jars and similar tubular containers			
	- Salmonids	10%	20%	NT
	- Sardines	5%	10%	NT
	- Other	10%	20%	NT
	2- - Other presentations	10%	20%	
	Crustaceans and molluscs, prepared or preserved			
	- Crustaceans	10%	30%	NT
	- Other	10%		

Customs duties and taxes generally amount to approximately 50% of the value of the goods. The impact of these duties and taxes on the cost price of the imports of fish and crustaceans can thus be realized.

THE MARKET PRICE-LIST

The prices given in this study have been ratified since 1980 by the Ministry of the Economy and the Plan.

MOVEMENT OF IMPORT PRICES FOR FRESH, FROZEN AND SALTED

SALTWATER PRODUCTS AND SARDINES IN THE CAMEROONS

Prices in thousands of francs per tonne

PRODUCTS	AVERAGE PRICE			AVERAGE RATE OF INCREASE	
	1979	1980	1981	1980	1981
FRESHWATER FISH	1975	993	69	- 49%	- 93%
FRESH TUNNY AND SMALL SARDINES	69	106	186	plus 53%	plus 75%
OTHER SALTWATER FISH	92	142	145	plus 54%	plus 2%
HERRING	1340	1600	1311	plus 19%	- 18%
COD, FILLETS	1344	1100	1273	- 17%	plus 14%
STOCKFISH	648	578	1391	- 10%	plus 140%
COD AND OTHER	1940	630	602	- 67%	- 4%
SARDINES	440	709	608	plus 61%	- 14%
OTHER SALTED FISH IN CASES	503	500	704	- 0.05%	plus 40%
SALTWATER CRUSTACEANS	2735	638	2521	- 76%	plus 295%
OTHER CRUSTACEANS	658	773	1323	plus 17%	plus 71%
SALTWATER MOLLUSCS	983	1429	1544	plus 45%	plus 8%
OTHER MOLLUSCS	1321	1649	1218	plus 24%	- 26%
GENERAL INDEX FOR THE GROUP	991	764	782	- 22%	plus 2%

MOVEMENT OF IMPORT PRICES FOR CANNED
FISH, CRUSTACEANS AND MOLLUSCS FROM 1979 TO 1981

In thousands of francs per tonne

PRODUCTS	AVERAGE PRICE			AVERAGE RATE OF INCREASE	
	1979	1980	1981	1980	1981
CANNED SALMONIDS	368	308	353	- 17%	plus 16%
CANNED SARDINES	108	175	173	plus 62%	- 1%
CANNED FISH, OTHER	345	248	327	plus 28%	- 31%
OTHER CANNED FISH, PREPARED	597	593	275	- 6%	- 53%
CRUSTACEANS, PREPARED OR PRESERVED	906	1205	991	plus 33%	- 17%
MOLLUSCS, PRESERVED	1280	1347	1125	plus 5%	- 16%
GENERAL INDEX FOR THE GROUP	600	645	540	plus 7.5%	- 16%

WHOLESALE MARKET PRICE-LIST BY SPECIES

OF FISH AND CRUSTACEANS IN DOUALA

SPECIES	UNIT KG	UNIT PRICE MALAYAGE	WHOLESALE UNIT PRICE BIDDER'S PRICE	WHOLESALE PRICE DOUALA WHOLESALER
BASS	20	7000	7400	
NYLONS	20	6100	6500	
LARGE SOLE	20	7000	7400	
JAWFISH	20	6100	6500	
THREAD-FIN	20	6100	6500	
CHAD	20	7000	7400	8500
LARGE HUMPBACKS	20	7000	7400	8500
MEDIUM-SIZED HUMPBACKS	20	6100	6500	
CONGER EELS	20	6100	6500	
PIKE (SNOEK)	20	6100	6500	8000
DISKS	20	6100	6500	6500
CROAKER	20	7000	7400	7500
JACK CREVALLE	20	6100	6500	
LARGE over 2 KGS	---	415/kg	435/kg	
SMALL FRYING FISH	20	3120	3500	3500
SHARKS	20	3120	3500	4500
BROWN CAT SHARK	20	3120	3500	
PLATES	20	3120	3500	
SKATE	20	3120	3500	

DEVELOPMENTS IN IMPORTS OF FRESH, FROZEN AND
SALTED SALTWATER PRODUCTS AND SARDINES FROM 1979 TO 1981

IN TONNES AND THOUSANDS OF CFA FRANCS

SPECIES	QUANTITIES			VALUE			COUNTRY OF ORIGIN
	1979	1980	1981	1979	1980	1981	
FRESHWATER FISH	1.9	4.2	49.3	3753	4171	3436	FRANCE, NORWAY, NIGERIA
FRESH TUNNY SMALL SARDINES	119	201.1	76.3	8263	21440	14244	FRANCE, USSR
OTHER SALTWATER FISH	14684	15452	17175	1357446	2201916	2500180	FRANCE, NETHERLANDS SWEDEN, NIGERIA, SPAIN, USSR, NORWAY, PORTUGAL
HERRING	2.9	2.6	4.1	3888	4159	5376	FRANCE, DENMARK
COD, FILLETS	1.7	1.5	2.1	2286	1666	2675	FRANCE, AUSTRALIA
STOCKFISH OR OTHER	298.5	238.3	36.2	193663	137790	50374	ARGENTINA, DENMARK, FRANCE, NORWAY, NIGERIA
KLIPFISH, FILLETS	-----	60	-----	-----	29100	-----	
COD AND OTHER	3.1	37.5	64.1	6015	23652	38632	FRANCE, AUSTRALIA
SARDINES	299.7	229.1	140	132104	161551	85228	FRANCE, GABON, NIGERIA, SPAIN, PORTUGAL
OTHER SALTED FISH IN CASES	26.1	45.1	30.1	21505	27507	19929	FRANCE, ARGENTINA, DENMARK, NORWAY, FRG
OTHER SALTED FISH, OTHER PRESENTATION	83.2	135	92.9	41880	67597	65469	IRELAND, NORWAY, CANADA, ARGENTINA, ICELAND
SALTWATER CRUSTACEANS	0.6	1.1	2.8	1641	702	7059	FRANCE, NIGERIA
CRUSTACEANS, OTHER	6.8	4.6	4.9	4478	3558	6487	FRANCE, JAPAN, CHINA, THAILAND
SALTWATER MOLLUSCS	29.4	26.9	24.4	28904	38444	37695	FRANCE, AUSTRIA, NORWAY, AUSTRALIA, FRG
MOLLUSCS, OTHER	4.3	2.4	4.9	5684	3959	5972	
TOTAL	15561	16387	17707	1811510	2727212	2842760	

Between 1979 and 1981, imports of fresh saltwater products increased by almost 56% in value and approximately 15% in quantity.

b) Importation of canned fish, crustaceans and molluscs.

TABLE SHOWING DEVELOPMENTS IN IMPORTS OF CANNED FISH,
CRUSTACEANS AND MOLLUSCS

DESCRIPTION	QUANTITIES (TONNES)			VALUE (OOO CFA)			COUNTRY OF ORIGIN
	1979	1980	1981	1979	1980	1981	
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CANNED SARDINES	2306	1354	1405.9	249660	237032	244384	FRANCE, NIGERIA, MOROCCO, SPAIN, SWEDEN, YUGOSLAVIA
CANNED FISH, OTHER	257.4	351.1	762.7	89008	87380	249777	IDEM
OTHER CANNED FISH, PREPARED	16.1	17.9	60.9	9623	10622	16767	FRG, CANADA, CHINA, NORWAY, FRANCE, SWEDEN
CRUSTACEANS, PREPARED OR PRESERVED	2	4.6	11.3	1812	5544	11209	CANADA, THAILAND, FRANCE, CHINA, USSR
MOLLUSCS, PREPARED OR PRESERVED	2.9	4.3	5.1	3711	5792	5738	IDEM
OTHER	---	---	---	20	40		
TOTAL	2596.4	1751.6	2254	358256	352400	530953	

The quantities of canned fish imports have remained unchanged over the past three years.

IMPORT SUMMARY TABLE
FOR FISHERY PRODUCE, CANNED FISH,
SARDINES AND SALTED FISH

DESCRIPTION	QUANTITIES IMPORTED (IN TONNES)			PERCENTAGE		
	1979	1980	1981	1979	1980	1981
1- FRESH FISHERY PRODUCE AND SARDINES	15145	15867	17477	82%	86.5%	83%
2- STOCKFISH AND SALTED FISH	415.5	520	230	3%	3%	1%
3- CANNED FISH AND CANNED PREPARED CRUSTACEANS	2752	1743	2238	15%	10.5%	11%
TOTAL	18312	18130	19945	100%	100%	100%

The import summary table for fishery produce, canned fish and sardines and salted fish shows that imports of fresh fishery products are predominant among total imports. The percentage of salted fish is dwindling, and the percentage of canned fish and crustaceans is holding steady and is experiencing an upward trend since last year.

In these fishery product imports, a distinction should be made between imports of fresh and frozen products. Imports of frozen fish correspond to almost 40% of local fish production for this year. To put it briefly, the quantities imported are rising steadily as the years go by because of the strong demand for this food product on the market and the unchanging situation in industrial-scale fishing.

Table 14 shows us the developments in imports of frozen fish between 1970 and 1980.

TABLE 14 - DEVELOPMENTS IN FROZEN FISH IMPORTS (IN TONNES)

YEAR	1970	1971	1972	1973	1974	1975	1976	1977	1978	1979	1980
QUANTITY	2364	4058	4637	5061	6226	5911	8011	8046	11226	13015	17741

that is, an average rate of increase of approximately 24% a year.

APPENDIX C

LIST OF FISH COMPANIES

NAME	ADDRESS	HEAD- QUARTERS	CAPITAL	COMPOSITION OF CAPITAL	MANAGEMENT	YEAR FOUNDED
Crevcam	B.P. 1968 telex 5321	Douala	SA 490 millions	SNI 65% Gordon Fishing 33% Other 2%	Président du Conseil Amadou Bello DG: Mveng Ferdinand	1968
Cotonnec et Cie	B.P. 883 telex 5302	Douala	SA 25 millions	100% private Camerounians	Président du Conseil E. Cotonnec DG: Michel Pernes (Français)	
Chalutcam	B.P. 883 telex 5302	Douala	SA 120 millions	Cotonnec Group	DG: Armangau PDG: E. Cotonnec	1979
Sopac		Douala	SA 10 millions			
Pecam	B.P. 1121 telex 5236	Douala	SA 73.4 millions	100% private Act: Dan Sea Invest Holding	Conseil Isacco Hassan DG: Pizenberg	1961
Copemar	B.P. 471	Douala	SA 250 millions	100% private	PDG: Isacco Hassan LIBANAIS	1957
Cafishtraco		Douala	SA 25 millions	100% private - Pesca SA - Iberles SA - Sooshes par SA - Spanish interests	DG: Jose Alegrando Ramires Conseil: Aladji Bala	1978
Neptune		Douala		SNI		

LIST OF FISH IMPORTERS

NAME	ADDRESS	HEAD- QUARTERS	CAPITAL	COMPOSITION OF CAPITAL	MANAGEMENT	MONTHLY CAPACITY	YEAR FOUNDED
SCPM	B.P. 5431 telex 5512	Douala		Ibru Group Nigeria 100% Africans	DG: En Divine	1000/mois	1974
CCFI	B.P. 1839 telex 5279	Douala	SA 120 millions	Belgium Portugal Cameroon	Conseil: A Tanko DG: M. Memezes Group Constante Training Tel: 93690403	1200T	1979
SOCADEP	B.P. 5454	Douala	SARL 20 millions	100% private Pakistan	DG: Advami Mohan	500T	1979
Poissonnerie Populaire	B.P. 8147	Douala	SARL	100% private	PDG: Yamsi André	1000T	
Societe Dikabo et Fils	B.P. 586 telex 5801 KN	Douala		100% private	DG: Bernard Massoua II	500T	
Poissonnerie de L'entente	B.P. 2482 Tel. 22-37-60	Yaoundé		100% private	DG: Nguelo Etienne		
Ets. Tchantchou		Douala					

LIST OF MAJOR FISH WHOLESALERS

NAME OF COMPANY	ADDRESS	CITY	TELEPHONE	CONTACT
Commerciale Kuoh	B.P. 238	Douala	42-25-01	
Ets. Habib	B.P. 545	Douala	42-44-78	M. Habib
Poissonnerie d'akwa	B.P. 144	Douala	42-30-23	
Poissonnerie Autule	B.P. 465	Douala		
Poissonnerie Cotonnec	B.P. 883	Douala	42-27-00	
Poissonnerie Nouvelle	B.P. 144	Douala	42-55-11	
Poissonnerie populaire	B.P. 8147	Douala		Yamsi André
Alimentation Camerounaise	B.P. 262	Edea		
Socodebas	B.P. 110	Edea		
Ets. Um Joseph	B.P. 45	Kribi	46-11-26	
Poissonnerie du Munco	B.P. 38	Nkongsamba	49-11-16	Directeur Kaffo Jean
Ste. Commerciale d'alimentation et de Poissonnerie	B.P. 213	Sangmelima		
Habib et cie	B.P. 823	Yaounde	22-01-24	
La Concha et cie	B.P. 348	Yaounde		
Ets. Bessala		Yaounde		
Poissonnerie Populaire		Yaounde		
Poissonnerie de l'entente	B.P. 2482	Yaounde	22-37-60	M. Guelo Etienne
Poissonnerie de l'ouest		Bafoussam		

Besides the above, SCPM has agencies at Bafoussam, Bamenda, Foubam, Tiko, Nkongsamba and Edea.

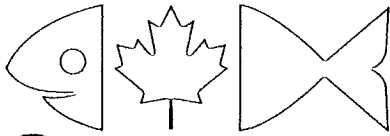
La Société Cotonnec has an agency at Yaoundé.

La Poissonnerie Populaire has warehouses at Yaoundé.

IMPORTERS SPECIALIZING IN CANNED FISH

NAME OF ESTABLISHMENT	ADDRESS	CITY	TELEPHONE
Sipal	B.P. 863	Douala	42-16-48
Despotakis Freres Ste.	B.P. 141	Yaouné	22-21-78 22-42-45 Telex: 8201KN
Alimentation Welcome	B.P. 213	Bafang	
Alimentation Moderne	B.P. 144	Bafoussam	44-15-38
Club l'an 2000	B.P. 524	Bafoussam	44-12-09
Palace Alimentation Centrale	B.P. 70	Bafoussam	44-14-05
Capal	B.P. 2051	Douala	
CCI	B.P. 1784	Douala	42-11-16
Codima	B.P. 477	Douala	42-18-76 42-64-20 Telex: 5550KN
ECKN	B.P. 238	la	42-15-01
General Alimentaire Ste	B.P. 1574	Douala	42-19-94
Gobina Priso Ets	B.P. 1443	Douala	
Hispano-CAM Ets	B.P. 5241		42-38-79
Jino Alimentaire Ets	B.P. 6354	Douala	42-32-81
Kapawa Gaston Ets	B.P. 1990	Douala	42-19-88
Kayo Elie Ets	B.P. 841	Douala	42-54-71
Marcan	B.P. 5107	Douala	
Meniedou & Cie	B.P. 1098	Douala	
Monthe Paul Ets	B.P. 726	Douala	42-36-40 42-16-58 42-36-30
Nashville International	B.P. 345	Douala	
Ngamdamoun Ets	B.P. 5129	Douala	
Nguepi J. Ets	B.P. 5429	Douala	42-19-01
Nguetchang Athanase Ets	B.P. 1176	Douala	42-58-33
Sarep	B.P. 461	Douala	42-29-61
Sidipat Ste	B.P. 275	Douala	42-25-19
Socaipa Ste	B.P. 306	Douala	
Socage Ste	B.P. 593	Douala	
Socampta Ste	B.P. 297	Douala	
Sohaing Andre Ets	B.P. 294	Douala	42-19-42 Telex: 5550KN
Sorimex	B.P. 1686	Douala	42-14-78

NAME OF ESTABLISHMENT	ADDRESS	CITY	TELEPHONE
Soudanaise	B.P. 84	Douala	42-19-60 Telex: 5603KN
Supercam	B.P. 5375	Douala	42-14-89 Telex: 5312KN
Tchamba Joseph Ets	B.P. 450	Douala	42-43-54
TIF ets.	B.P. 1373	Douala	42-26-17
Toko Christophe Ets	B.P. 828	Douala	42-39-34
Alimentation Camerounaise	B.P. 262	Edea	
Alicam	B.P. 94	Foumban	48-22-56
C.G.A.	B.P. 110	Garoua	27-11-55
A.E.K.	B.P. 54	Kribi	46-10-28 Telex: 5248KN 8375KN 5686KN
Hadja Didjatou Soudi Ets	B.P. 44	Maroua	29-12-94
Noumsi & Fils Ets	B.P. 81	Mbalmayo	28-10-26
Socitrabar	B.P. 70	Mbalmayo	28-12-46
Babba Mahamadou Banyo Ets	B.P. 143	Ngaoundere	25-10-83
Dabadji & Cie Ste	B.P. 69	Ngaoundere	25-13-59
Commerciale d'alimentation & de Poissonnerie Ste	B.P. 213	Sangmelima	
ATA	B.P. 160	Victoria	33-72-45
Marcam	B.P. 67	Victoria	33-42-46
Alimentation Generale Provinciale	B.P. 1012	Yaoundé	22-10-54
Djiko Simeon Ets	B.P. 663	Yaoundé	22-17-14
Economique des produc- teurs Camerounais Ste	B.P. 4232	Yaoundé	
Kam Jacques Ets	B.P. 987	Yaoundé	22-02-05
Kangula Maurice Ets	B.P. 709	Yaoundé	22-35-27
Maison T. Bella	B.P. 563	Yaoundé	22-36-31
Martin et Fils Ets.	B.P. 446	Yaoundé	22-39-55
Ngankeu Pierre Ets	B.P. 2390	Yaoundé	22-43-45
Nziko Andre	B.P. 1561	Yaoundé	22-17-47
Nzouekon Daniel Ets	B.P. 371	Yaoundé	22-31-56



FISHERY MARKET DEVELOPMENTS **COMMERCIALISATION DES PRODUITS DE LA PÊCHE**

FMD NO. 18

DECEMBER 1982

JAPANESE FISHERIES SITUATION REPORT

Attached is a report prepared by the Industry, Trade & Commerce staff at the Canadian Embassy in Tokyo giving the situation report for the first nine months of 1982.

Att.

Aussi disponible en français

For further information
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K.M. Torrie
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SITUATION REPORT - FISHERIES - JAPAN

SUMMARY

In first nine months of 1982, volume of landings is running 4 per cent above same period 1981 and new annual record expected. Prices continue firm. Imports have also increased by 9 per cent in volume and 21 per cent in value. Prospects continue to be favourable for good Canadian sales salmon, salmon roe, herring roe, food herring, squid, black cod, crab, and capelin. Following sections provide details general industry performance and situation for selected species and products of interest to Canada.

OVERVIEW

Landings at 66 major fishing ports in first nine months/82 increased 4 per cent over same period in 1981. Projection of these results to year end indicates 1982 catch will total record of approximately 11.75 million MT. This represents increase of 400,000 MT over 1981 (previous high) and gain of more than 1.0 million tonnes over 1979. Average landing prices have also increased to yen 162 from yen 159 in same period 1981. Volume of imports which recorded slight decline in January-June period increased substantially in third quarter. As result, imports in nine months ending September 30 rose 9.4 per cent to 914.4 thousand MT from 835.9 thousand tonnes in 1981. Value of imports rose by 21 per cent, from yen 641,630 million to yen 778,118 million currently, and average value/kg also rose from yen 768 to yen 851. Much of increased value is traceable to weakening yen against USA dollar with exchange rates this year ranging from yen 216 to 275 to dollar in October (approximately 258-259-November 20) compared to yen 196 to 216 range in 1981. Comparative imports results by major categories are as follows:

Volume Thousand MT

Value 1,000 Million Yen

	<u>Jan-Sept/82</u>		<u>Jan-Sept/81</u>	
	<u>Volume</u>	<u>Value</u>	<u>Volume</u>	<u>Value</u>
Live	11.0	21.9	19.1	27.7
Fresh/frozen	744.9	618.6	633.1	486.3
Salted/dried/smoked	32.4	67.7	30.3	63.1
Prepared/preserved	32.6	39.9	30.0	27.3
Others	93.6	31.0	123.7	37.2
Total	914.4	778.1	835.9	641.6

SALMON

As a result of poor catches to date, government, industry and trade estimates of landings and imports have been completely revised. Autumn salmon fishery (roe salmon) in Hokkaido and Northern Mainland, which began September 5, has been poor, relative to record harvests which had been forecast. As of November 21, landings are only 50,530 MT, decrease of 17.7 per cent from same date in 1981. Government officials at Hokkaido hatchery are still confident of good late run, but industry is now inclined to doubt this assessment. In any event, late run salmon are likely to have faded colors and consequently silver bright products will be scarce.

Low catch has led to substantial price increase for all salmon products, and imported products are now lower than domestic salmon, despite lower yen value. Imports of fresh frozen salmon at end September 1982 totalled 89,508 MT (81,273 from USA, 5,730 from Canada, and 1,405 from N/Korea). Imports of sockeye may not reach 50,000 MT, but strong purchases of all other species could lift total 1982 imports to 100,000 MT (1981-72,000). Lack of frozen imported sockeye has led to scarcity on Tokyo market this product. Good quality salted sockeye (from Alaska/Canadian frozen) is frequently selling at yen 2,000/kg.

SALMON ROE

Imports January 1 a September 30, 6,146 MT (5,820 USA, 322 Canada). Trade estimates total imports during 82 will be approximately 8,500 MT. Early in year, forecasts of record supplies autumn (roe) salmon resulted in price reductions and strong demand. With realization that poor catch likely, prices have again increased. (Most of domestic roe production in Northern Japan will be for Ikura manufacturing.) Out of 8,500 MT of imported roe, approximately half volume has already been sold, and balance will be sold during year-end season. Current prices in Tokyo market are yen 3,500-3,800/kg for grade one chum roe, and yen 3,000-3,300/kg for grade one pink roe.

HERRING ROE

Nine month imports salted herring roe 6,942 MT (4,464 Canada, 1,482 USA, 556 S/Korea, 343 PR China). Trade estimates total supply of herring roe in 1982 will be 10,200 MT, comprising 7,500-7,700 from imported roe, 2,000 MT from imported roe herring (approximately 23,000 MT and 500 MT roe carried over from 1981. Out of 10,200 MT supply, approximately 3,500 MT sold by October 1982, and further 6,500 MT expected to be

sold during November-December season; including 3,000 MT through outside wholesale markets and 3,500 MT in markets. Due to tight supply, most of large processors are selling at designated prices through markets. Prices at Tokyo market: extra large yen 7,300-7,500/kg; large yen 6,800-7,300; medium 6,400-7,000; small 6,200-6,700. Prices approximately yen 800-1,000 higher than in 1981. Although peak season approaching, sales remain relatively slow.

Herring roe on kelp (Kazunoko Kombu). Imports January-September 1982 461 MT (180 Canada, 281 USA). Sales resistance continues against high prices caused by new buyers who bid up prices. However, demand for high quality Canadian products has been good compared to low grade Alaska products. Outside market wholesale price in Tokyo (for restaurants) is now yen 8,000-8,500/kg for first grade. Besides restaurant trade, some product now entering consumer channels through herring roe processors.

FOOD HERRING

Domestic catch of spring herring off Hokkaido was very good. Landings at major ports from January to September totalled 13,969 MT, increase of 682 per cent over same period in 1981. Projected to national basis, catch should total 27-29,000 MT. As this catch is primarily young herring without roe and are too small for fresh trade, all are being processed. Herring fishery in East China Sea off coast of Kyushu commenced mid-September. Although tonnage is not available, landings are reported better than last year (poor year). Imports of frozen herring January-September 1982 were 43,756 MT (28,913 USA - includes 23,000 MT of roe herring from Alaska, 13,000 MT Canada, 500 Netherlands, 480 S/Korea, 352 USSR). In aggregate, supplies for processing (includes carcasses from imported roe herring) are abundant. Supply of food herring for fresh trade has also increased. However, demand is strong, partly due to shortage of other green species (i.e. mackerel, saury, etc.) and supplies are tight.

SQUID

Although good catch of common squid was expected, summer and autumn squid fisheries in Sea of Japan will terminate with approximately same volume as 1981 (i.e. 140,000 MT). Autumn squid fisheries in North Pacific, which will continue for some time, are also expected to match last years level of 25,000 MT. Catch of red squid taken off-shore in Pacific (mostly by drifters) is also reported as fair, and not expected to exceed 140,000 MT product weight (60 per cent in tube form-converted at 180,000 MT of round weight). Combined imports of squid and cuttlefish in nine months totalled 71,081 MT, substantially above 52,770 MT in same period of

1981 (when imports were still slow). Actual imports, however, are mostly cuttlefish, with some Loligo. Imports of squid equivalent to Canadian Illex amount to approximately 22,000 MT (7,117 Argentina, 4,460 Poland, 2,556 N/Zealand, 2,500 S/Korea, 2,000 Spain, 1,600 USA, and Canada 428). Further 2-3,000 MT of imports from Poland still expected. Prices all squid species, which decreased in summer months in anticipation of good catch, reversed direction around end of August 1982. As a result, sales have become slow but, as no supply recovery expected, prices will remain high until spring 1983. Current prices frozen common squid Tokyo central market are yen 5,000-5,100/case of 7.5 kgs containing 16-20 squid; yen 4,900-5,000 for 21-25 squid/case; and yen 4,750-4,900 for 26-30 squid/case. As landings of fresh squid have been very low, high quality product often realizes more than yen 1,000/kg at landing ports.

BLACK COD

Due to USA restrictions in 1981, supplies of black cod have become short and prices have increased. Dressed/frozen on board domestic and imported black cod quoted Tokyo fish market at yen 900/kg size 4-6 per case of 12 kgs; yen 850-860 size 7-8; yen 650-670 size 9-10; and yen 500-530 size 11-15. High quality realized yen 1,050/kg. Demand for Canadian and USA product expected to be strong balance 1982 and throughout 1983.

CAPELIN

Imports January-September 1982 33,186 MT (15,225 Norway; 13,718 Canada; 3,292 USSR-unsorted male/female; 952 Iceland). Approximately 1,000 MT from Canada still to be imported before year end. Newfoundland capelin, which used to be attractive for its large size, now handicapped due to abundant supply larger fish from other countries and late arrival of Canadian capelin on market. Trade believes that 1982 supply is too large and surplus inventory expected at year end. As result, imports may seek reduced prices for 1983. Price negotiations with Norway will commence in December 1982.

CRAB SECTIONS

Poor catch of king crab reported in Alaska. Asking prices are very high and most Japanese importers are refusing to buy. Total king crab imports may not reach 1,500 MT, about half volume anticipated in early 1982. Imports of frozen crab January-September 1982 18,906 MT (10,731 USA; 3,291 Canada; 2,000 PR/China (mostly rock crab); 1,744 S/Korea; and 747 USSR). Due to very short supply, prices of king, large snow (*Chionoecetes bairdii*), and Tanner (or queen) crab (*C. opilio*) increased more than 50 per cent in spring 1982,

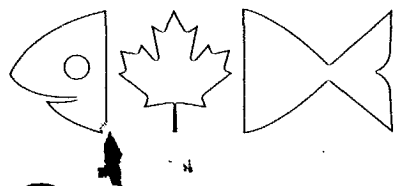
and sales slowed dramatically. Canadian queen crab continues to sell well at yen 1,600/kg for size above 200 grams, yen 1,500/kg for 150-200 grams, and yen 1,400/kg for less than 150 grams. (All sections, cooked/frozen 5 kg repack in shrink-pack from imported ocean-run bulk pack). Sales of large size Alaska snow crab (*C. bairdii*) and king crab are so slow that no quotations could be obtained at Tokyo fish market.

NORTHERN SHRIMP

Following excessive imports of northern shrimp in 1981, which totalled nearly 8,000 MT, imports in 1982 are expected to decline to normal level of 5,000 MT. Imports January-September 1982 were 4,200 MT (2,160 Norway; 1,146 Denmark; 389 Canada; 299 USSR; and 201 Greenland). Demand is good and sales are steady. Wholesale prices in Tokyo area for Canadian frozen (whole, raw) 2 kg block pack are yen 1,200-1,300/kg for 50-70 count and yen 900/kg for 90-120 count.

LATER NEWS

Preliminary data shows total imports to end October at more than one million MT. full details not yet available.



**FISHERY MARKET
DEVELOPMENTS**

**COMMERCIALISATION DES
PRODUITS DE LA PÊCHE**

FMD NO. 17

DECEMBER 1982

JAPANESE SQUID OUTLOOK

Attached is a report prepared by the Industry,
Trade and Commerce staff at the Canadian Embassy in
Tokyo presenting the Japanese squid outlook as of
November 16, 1982.

Att.

For further information
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Aussi disponible en français

JAPANESE SQUID OUTLOOK

The Japanese government is expected to announce squid IQ of 25,000 M.T. for the second half in the near future. This quantity is the same as the second half of 1981.

LANDINGS:

As previously reported, the Japanese common squid catch is much lower than expected at the beginning of the year. Landings of this species at 66 major ports from January-September was approximately 91,000 M.T., comprising approximately 30,000 M.T. fresh and balance frozen. Total is only slightly above exceptionally poor catch in the same period of 1981 which totalled 78,958 M.T. Total catch in the Sea of Japan may not reach 140,000 M.T. while the North Pacific landings are not expected to exceed 25,000 M.T. Autumn squid season continues but reports indicate squid are scattered and the catch is not expected to be large. Red squid landings (in Pacific) are also reported to be low, and may not reach 140,000 M.T. product weight (tube and round) - total catch is not available but quesestimated at 180,000 M.T. Loligo catch is also understood to be running to few thousand M.T. but details not available.

PRICES:

Top quality fresh squid at landings ports frequently purchased at more than Yen 1000/kg. and the average prices running Yen 550-600. The price of frozen has ranged from Yen 400-500 and has sold at Tokyo for average of Yen 4,900/case of 7.5 kg. for size 26-30 squid/case (Yen 653/kg) since September.

IMPORTS:

Based on January-September import data trade estimates approximately 22,000 M.T. of squid imported during this period. Estimate, which excludes cuttlefish and loligo, includes 7,117 M.T. from Argentina, 4,460 Poland, 2556, New Zealand, 2,500 Korea, 2000 Spain, 1500 U.S.A., 428 Canada. Imports from Argentina and New Zealand have almost stopped, but further 2000 M.T. is expected from Poland. Because of high prices, demand is slow. Recent offers from Spain (mostly Argentinian illex in tube form) have been declining due to high prices.

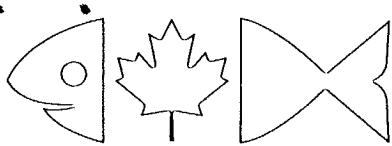
INVENTORIES:

Total inventories of domestic and imported squid are low. Latter has been sold to processors.

STATISTICS:

Request for separation of squid and cuttlefish imports was passed to Customs Bureau, Minister of Finance, by Fishery Agency. However, because of recent reform and constraint measures, the Bureau is resisting request due to costs involved. Believe it is unlikely that breakout will be made commencing in January 1983. It will likely be delayed at least year.

Note, Buenos Aires reports disappointing results of 1982 Argentina catch. This contrasts with satisfactory catches reported by Japanese vessels in same general area. Also note no exports to Japan reported, whereas Japanese imports show 7117 M.T. from Argentina, including approximately 2000 M.T. landed in Argentina and exported through joint venture company. Have no explanation for difference in trade data.



FISHERY MARKET
DEVELOPMENTS

COMMERCIALISATION DES
PRODUITS DE LA PÊCHE

FMD NO. 16

OCTOBER 1982

SITUATION REPORT - SPAIN

Attached is a report on Spanish fisheries for 1981 compiled by the Canadian Trade Office in Madrid and based on newly released Spanish statistics.

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Aussi disponible en français

SPAIN - FISHERIES SITUATION REPORT 1981-82

Overview

Commentaries in Spanish press concerning the domestic fleets' activities in 1981 were mostly vague and official figures for both 1980 and 1981 were only released in the last few weeks.

In spite of the Spanish Government's stated intentions, 1981 went by without seeing the long-awaited reorganization of the fleet and the home fishing grounds.

The Spanish fisheries authorities are concerned about the impact that such measures will have on the sector both socially and economically and they will doubtlessly have submitted to a certain amount of pressure from vested interests, particularly the fishing vessel owners, through their associations Agarba, Arguiba, Anavar, and others.

In 1981 the Spanish fisheries authorities did everything possible to maintain a presence in those foreign waters traditionally fished by Spanish vessels and to find new areas. They had a mixed bag of successes and failures; negotiations with Canada, Norway, Mauritania and the EEC all giving fairly negative results.

In March 1981 the state monopoly Campsa increased the price of gasoil to the fleet by 5 ptas. per litre and in July 1981 by another 3 ptas. At the same time the official subsidy on gasoil to fishing vessels remained at the 1979 level of 7.65 ptas per litre. Very often Spanish fueloil was more expensive than the accepted price abroad.

The number of Spanish vessels arrested in foreign waters for unauthorized fishing rose sharply in 1981 mostly in the EEC area and off Morocco. Total fines in the year were reported to be 165 million ptas, i.e. approx C\$ 2 million.

Altogether, fish production reached just over 1,200,000 tonnes in 1981, compared to 1,134,000 in 1980. This comprised 850,000 tonnes of fresh and salted fish, 250,000 tonnes of frozen and 100,000 tonnes from fish farms.

The most recent figures released by the Spanish Department of Fisheries are as follows:

Landings of the Principal Species (MT)

	<u>1980</u>	<u>1981</u>
Anchovy	68,919.2	65,718.1
Tuna	28,166.5	33,630.0
White Tuna	23,982.2	20,825.1
Blue Whiting	32,791.5	20,301.3
Cod	27,686.3	8,296.6
Sea Pream	8,083.8	6,123.2
Bogue	8,604.7	5,609.4
Atlantic Bonito	1,191.0	3,239.5
Forkbeard	1,150.3	1,338.2
Mackerel	25,808.6	21,881.7
Sea Bream (cachucho)	992.9	840.8
Conger Eel	3,673.0	3,759.8
Haddock	913.0	884.0
Whiting	7,715.8	5,019.2
White Sole	18,007.0	20,228.4
Horse Mackerel	58,122.7	54,588.3
Skipjack	16,121.6	20,907.2
Hake	50,296.3	65,982.8
Scad	4,894.1	8,779.7
Small Hake	71,122.5	80,562.2
Swordfish	4,658.5	4,844.8
Yellowfin Tuna	49.5	135.9
Monkfish	19,660.6	20,215.2
Goatfish	3,181.9	3,222.1
Sardine	226,527.8	263,094.2

Total 1981 landings of all species were valued at 96 billion pesetas (approx C\$1.7 billion).

The north-west region produced 46.6% of these landings, the Canary Islands 17.2%, the Cantabria 10%.

Fishing Fleet

There has been a steady growth in the Spanish fishing fleet which currently numbers 17,555 vessels with a total registered gross tonnage of 749,411, 2,750.094 H.P. and 108,414 fishermen. For each ton of shipping 1.65 MT of fish were caught last year.

The Spanish fleet is made up as follow:

<u>Region</u>	<u>No.of vessels</u>	<u>R.G.T.</u>	<u>H.P</u>	<u>Crew</u>
Cantabria	2,650	164,202	55,670	18,633
Northwest	5,493	250,623	819,528	33,747
South Atlantic	1,809	132,811	472,119	17,180
SouthMediterranean	888	18,510	95,579	6,564
Levant (East Med.)	884	25,605	126,532	6,030
Tramontana (North)	2,739	43,423	289,914	12,222
Balearic Islands	1,040	6,420	50,612	2,579
Canary Islands	2,052	107,817	337,140	11,459

A further regional breakdown by type of vessel is available, it includes a total of 2,830 stern trawlers,, 524 trawler-freezers, 106 codfishers, 2169 purse seiners, 11,475 surface fishing boats, 55 purse seiner-freezers, 13 factory ships and 383 service vessels.

Foreign Trade in Fisheries Products

Imports of fish from the EEC rose from 55,000 tonnes and a value of 3.7 billion ptas. in 1976 to 85,000 tonnes, 14 billion ptas in 1981. Imports of fish from all sources reached 250,000 tonnes in 1981 for a value of 40 billion ptas (approx C\$500 million).

As cod and squid are of particular interest commercially to Canada we show hereunder a complete breakdown by supplying countries of these two groups Jan-Dec 1981, metric tonnes: (NB. Tariff Nos. changed in 1981).

Tariff No.

03.01.481 Fresh cod, except fillets

France	69
Belgium	10
Iceland	15
W. Germany	35
U.K.	475
Eire	258
Denmark	1,993
Sweden	4,049
Finland	36
Canada	174
High sea fleet	<u>2</u>
Total	7,116 MT

Value: 67 million ptas (approx C\$8.39 million)

03.01.482 Chilled cod, except fillets

U.K.	6
Denmark	501
Norway	20
Sweden	<u>130</u>
Total	657 MT

Value: 108 million ptas (approx C\$1.35 million)

03.01.49 Frozen cod, except fillets

France	19
U.K.	9
Eire	7
Denmark	106
Norway	20
Sweden	108
Finland	14
Canada	837
Greenland	16
Mexico	15
Japan	1
Denmark to C.I.	35
Iceland to C.I.	1
Finland to C.I.	<u>17</u>
Total	1,205 MT

Value: 117 million ptas (approx C\$1.46 million)

03.01.81.1 Fresh cod fillets

France	22
Holland	43
W. Germany	57
U.K.	2
Erie	4
Denmark	4,572
Sweden	<u>155</u>

Total 4,855 MT

Value: 1,081 million ptas (approx C\$13.5 million)

03.01.81.2 Chilled cod fillets

France	19
Denmark	21
Sweden	<u>6</u>

Total 46 MT

Value: 10 million ptas (approx C\$ 125,000)

03.01.91 Frozen cod fillets

France	230
Holland	20
Denmark	5
Denmark to CI	<u>1</u>

Total 256 MT

Value: 54 million ptas (approx C\$ 675,000)

03.02.05. Dried salted cod, except fillets

Denmark	20
Canada	268
Norway to CI	369
Mauritania to C.I.	178
Senegal to CI	14
S.Korea to CI	1
Norway to Ceuta	<u>7</u>

Total 857 MT

Value: 227 million ptas (approx C\$2.84 million)

03.02.07 Wet-salted cod, except fillets

France	51
U.K.	47
Eire	140
Denmark	4,089
Iceland	9,439
Faroos	3,844
Norway	2,098
Sweden	22
USA	336
Canada	3,064
Greenland	241
Mexico	2,004
Mauritania to C.I.	16

Total 25,391 Mt

Value: 5,772 million ptas. (approx C\$72.15 million)

03.02.191 Other dried cod, including salted, except fillets

Norway	43
Norway to C.I.	2
Mauritania to C.I.	5
Panama to C.I.	3
S. Korea to C.I.	2

Total 55 Mt

Value: 13 million ptas (approx C\$ 162,000)

03.02.21 Dried or wet salted cod fillets

Denmark	64
Iceland	258
Norway	15
Morocco	30
Norway to C.I.	2

Total 369 MT

Value: 106 million ptas (approx C\$1.32 million)

From the above it will be noted that Spain imported a total of 40,807 MT of cod and codfish products in 1981 for an approx value of C\$102 million. This is a slight increase over 1980, when 37,223 MT were imported.

Squid

03.03.680 Frozen flying squid tube

Holland	20
Portugal	321
Canada	225
Mexico	1
Panama	15
Uruguay	701
Morocco to C.I.	22
Uruguay to C.I.	5
Argentina to C.I.	117
Japan to C.I.	50

Total 1,477 MT

Value 191 million ptas (approx C\$2.39 million)

03.03.681 Frozen Loligo Squid

Poland	1,112
Morocco	1,328
USA	487
Panama	902
Singapor	443
South Korea	1,144
New Zeland	949
Canada to C.I.	100
Other countries (small quantities)	2,419

Total 8,884 MT

Value: 2,019 million ptas (approx C\$25.24 million)

03.03.682 Frozen Illex Squid tube

USSR	234
Poland	5,064
Canada	1,707
Argentina	3,720
Singapor	250
USSR to C.I.	892
Canada to C.I.	497
Argentina to C.I.	102
Singapor to C.I.	310
Japan to C.I.	295
New Zealand to C.I.	616
Other countries (small quantities)	263

Total 13,950 MT.

Value: 1,236 million ptas. (approx C\$15.45 million)

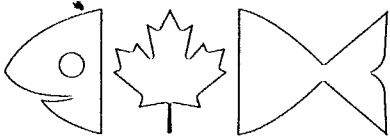
03.03.683 Other Frozen squid

Various sources 76 MT

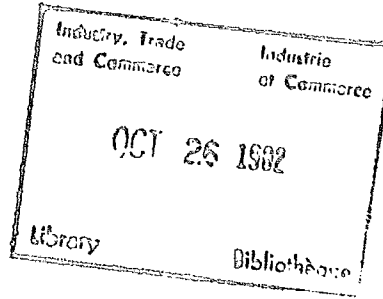
Value: 15 million ptas. (approx C\$187,000)

Total imports of all types of squid and squid tube in 1981 amounted to 24,387 MT for an approx value of C\$43 million compared to 33,814 MT in 1980, C\$50 million.

Aug. 24/82
MFC:rr/



FISHERY MARKET DEVELOPMENTS COMMERCIALISATION DES PRODUITS DE LA PÊCHE



FMD NO. 15

OCTOBER, 1982

FISHERY PRODUCTS MARKET OPPORTUNITIES

IN GREECE

For further information
please contact:

Eon Fraser
(613) 995-8107

Aussi disponible en français

Fishery Products Market Opportunities in Greece

Background

Greece became the tenth member of the European Communities on January 1, 1981, and has been an associate member of the EEC since 1962.

The Association Agreement provided for the elimination of customs duties and quantitative restrictions and for the adoption by Greece of the Common Customs Tariff

Internal Trade Effects

Greek tariffs are being reduced (on community goods) in six stages with 10% cuts on January 1, 1981, and 10% on January 1, 1982, and four more reductions of 20% so that all customs duties will be eliminated by January 1, 1986.

External Effects

On January 1, 1981, Greece began progressive alignment of its tariff with those of the EC. Differences will be eliminated by January 1, 1986.

During the 5-year transition period Greece will retain some global quotas for a small number of products.

Greece must apply the EC's System of Preferences and the preferential agreements entered into by the EC with third countries.

Import deposits and cash payments which were required by Greece before January 1, 1981, are to be progressively eliminated by January 1, 1984.

Impact on Canadian Exports

Canada will gain more than it loses from Greece's accession to the EC since the former regime was among the most restrictive in Europe.

Of twenty major export items, access is improved for 12, unchanged for 6 and worsened for one (infant foods).

It has been proposed that Canada enter into Article XXIV:6 negotiations with the EC:

- to obtain EC's detailed assessment of the impact on Canadian trade of Greece's accession and

- to seek compensation for items adversely affected including preserved fish, Tariff Item 16.04A.3, 4 (see Appendix 1).

Total Canadian Fish Exports to Greece

<u>Category</u>	(\$,000)			*Jan
	<u>1979</u>	<u>1980</u>	<u>1981</u>	<u>Jun</u> <u>1982*</u>
Whole, dressed, fresh or frozen	440	662	44	-
Filletts and blocks, fresh or frozen	-	58	4	678
Preserved except canned	283	958	3,159	339
Fish canned	35	60	73	21
Other fishery foods and feeds	68	346	24	122

Source: Statistics Canada

Incoming Fishery Products Buyers' Mission

An Incoming Fishery Products Buyers' Mission, of five Greek importers, a Minister of Agriculture Fish Inspection Official, and the Commercial Officer from the Canadian Embassy, Athens, sponsored by IT&C, visited the Atlantic Provinces September 6-11, 1982, in quest of new fishery products for export to Greece.

This Mission was a planned follow-up to the food products samples show held at the Canadian Embassy in Athens May 11-15, 1981, in which 46 Canadian firms participated. This resulted in eight Canadian companies establishing representation in Greece, five of which are fish exporters.

The Mission Members met Canadian exporters and processors from Quebec, New Brunswick, Prince Edward Island, Nova Scotia, and Newfoundland.

A special program was provided for the Greek fisheries inspector. He visited plants in New Brunswick with Canadian Fish Inspection branch Officers and in Newfoundland met with the Chief of Inspection to discuss imports of fish into Greece. He also was given a special and detailed tour of the White Hills Fisheries Laboratory in St. John's. He was most

impressed with the system of quality control and inspection that all Canadian fishery products are subject to.

All Mission Members were impressed by Canadian plants and fish product quality, but said that transportation costs were Canada's major constraint in enlarging its trade with Greece.

They advocated that exporters combine shipments to Greece so as to reduce shipping rates as far as possible.

Market Opportunities Arising Directly from the Mission.
(Deals that were made by Mission Members are confidential and may not form part of this report).

Other Opportunities

Frozen Fish (Whole)

Cod, pollock, hake, mackerel, flounder (all small to medium sizes) gaspereau, silversides. In making offers always provide the latin name.

Frozen Cod

The Greek market is estimated at 5,000t to 6,000t/week. Besides this the Greek military places 1,000t orders but requires "frozen at sea".

Salted Cod

The market for wet salted cod is in excess of 10,000t some 2,500 of which has been coming from Canada. (Iceland has converted to Canadian-type boxes to consolidate its market hold). There is also a demand for boneless cod bits, and flakes for the catering trade. The consuming season is late March and early April.

Wet salted (45-50% of moisture) of second quality is required by traders from time to time for Zaire. For this market the fish should be medium sized, 20-30 pieces per (strong) 25 kg carton. Orders possible up to 1,000t. (Norway is offering the equivalent at C\$2.90 kg CIF Zaire including 5% agent's commission).

Hake

Wet salted or pickled in brine in barrels for further processing is being sought by some importers.

Redfish (Frozen, headless)

There are markets for: Red Mullet, Red Barch (V. Peneus SP., Mullus Surmuletus, Lutzanus SP.) 400 grs to 1 kg each.

Herring

Dutch double smoked "golden" cure.
(Greek market consumption 1,200 to 1,500t/year with Holland main supplier. Recent price US\$20/wooden box of 6.8 kg net CIF Piraeus.)

N.B. For shipping, the tare weight in Greece is 8.5 kg per container for smoked herring, and this includes the weight of the packaging materials which must not exceed 20% of total weight.

Herring fillets (Smoked)

Small trade supplied from France, West Germany, Holland, in vacuum sealed plastic bags.

Cod roe

Now supplied by Iceland/Norway. The requirement is for large roe, unbroken, in 20-24 percent brine solution.

Iceland/Norway; product US\$100 per 120 kg barrel (wood or plastic) FOB for first quality; US\$80 per 120 kg barrel FOB for second quality. Estimated freight US\$13/barrel. Potential exporters should obtain Scandinavian samples for assessment and attempt to produce a similar product.

Contact

Smoked salmon

Sales has been limited. Supplied from Scotland, Holland, Denmark and Canada.

Smoked Trout, Mackerel, Sardines, Halibut, Dogfin

Limited demand might be generated for this species.

Sardines for Greek or African market contact:

John Trataris
27 Pindarou
Athens

For African market, competition is from Portugal sardines in olive oil at C\$20.50 for 100 x 125 gram tins including 2% agent's commission.

Smoked Swordfish in brine:

Greek state laboratory permits maximum mercury tolerance for all fish of 0.7 ppm with possible reduction to 0.5 ppm.

Contact:

Dr. N. Charitos
Hellenic Export Promotion Association
c/o Canadian Embassy Athens

Lobsters

Requires Greek health certificate, specimen B for "live fish and shellfish" required by law No. 786/78. Certificates available ITC Halifax Regional Office or from Canadian Embassy Athens.

DFO Inspection service must certify that lobsters:

- a) Come from areas not forbidden for hygienic reasons. If not polluted by petroleum, effluents or sewage disposal.
- b) Are suitable for human consumption;
- c) To not contain traces of heavy metals for organochlorinated parasites in a percentage harmful to consumer health.
- d) Do not/not contain gut bacteria in excess of five percent per cubic centimeter of flesh.
- e) Transported by means guaranteeing their arrival alive and healthy.

Other Greek Market Leads

Contacts from the 1981 Food Products Show in Athens;
(Interest indicated where known):

Athanasios Pouliadis, Dipl. Ing.
Managing Director
Pouliadis Associates Ltd.
Kolonaki Square 19-20
Athens, Greece
Tel: 36 24 170
Telex 21 0391 Poul Gr

Christos Frangopoulos
Frangopoulos Bros. Co.
Psaron 11 - Rendy
Athens, Greece
Tel: 34 57 093
Telex: 219439 Fran Gr
- Canned mackerel for Egyptian market
- Broker for salted cod

Douglas J. Beaghton
54 Patr. Ioakeim Street
Athens, Greece
Tel: 747 276
Telex: 5158 GR
- Flounder
- Brake (salted)

G.A. Calpacas
Commercial Representatives
Importers, Exporters and Distributors
Socratous Street
Hens 112, Greece
Tel: 8953 341
- Loligo squid in cans

Dimitri Malliarakis
Inimex G.S. Cavounidis
64 P Ioakim Street
Athens 140, Greece
Tel: 711 014
- Smoked salmon

Andrew S. Karamalis
Managing Director
Interco Commercial Ltd.
Victor Hugo 19, Athens
Tel: 52 37 127
52 37 128
Telex: 21-8444 Inco Gr

George Anagnostopoulos
Assistant General Manager
Alfa-Beta Vassilopoulos S.A
P.O. Box 14
Halandri Attikis, Greece
Tel: 68 20 741
Telex: (21) 4758
- Canned salmon

John S. Mavricos
Managing Director
Interco Commercial Ltd.
Victor Hugo 19, Athens
Tel: 52 37 127
52 37 128
Telex: 21-8444 Inco Gr
- Salted cod
- Canned fish

John Pazaropoulos
General Manager of the firms
"Pean" Pazaropoulos and Co.
Representations Pazaropoulos and
Giannakogorgos and Co. Importers
Athens, Greece
Tel: 32 44 586
31 11 818
Telex: 8823 Pean

Costas VL Bertzeletos
Managing Director
MG. Pipinellis & Co. Ltd.
P.O. Box 145
Piraeus, Greece
Tel: 481 9531 - 482 5889
Telex: 213969
- Agent and Broker

Spiro Georgeoglou
Elamer Ltd.
14, Xenofontos Str.
Athens 118, Greece
Tel: 933-1878
Telex: 41 42233 Elam Gr
- Salt Cod

Leads from other Sources

Requirements for whole frozen squid (loligo spp.); H&G Hake (merluccius Spp.), H&G Dogfish skin-on or skinless without fins and tail, (mustelus spp preferred but also squalus acanthias); red snapper (Lutjanus campechanus), bluefish (pomatomus salatrix); sheepsheads (archo-sargus probatocephalus); scup (stentomus chrysops); striped (black) mullet (mugil cephalus) and large red porgy (pargus sedecim); fresh groupers (mycteroperca spp. and Epinephelus spp.); fresh and frozen goatfish (mullidae purmuletus).

Prospective importers should obtain a copy of Presidential Decree 786 which contains current import regulations.

More Importers

Mr. Angelo Kyriazis
Porto Heli, Ltd.
10 Akti Possidonos
Piraeus 32, Greece
Tel: 4110 230
Tlx: 21 1371

Requirements

Loligo squid graded 1-10 pcs; 10-20 pcs; and 20-60 pcs/kg.

Imports more than 1 million lbs annually.

Also interested in flounders, soles, red snapper, groupers, goatfish, stripped (black) mullet.

5% deposit and cash against documents for new suppliers.

Mr. John Pantazis
Europe Cold Storage S.A.
P. Ralli 8-Rouf
Greece
Tel: 3465-231
Tlx: 219367

Interested in offers on Loligo squid, hake (silver and red, head-off, tail-off, gutted, skin-on -- prefers Japanese style cut along nape).

Whole scup (5 fish/ kg; 15-25 kg master carton); dogfish carcasses (backs), skin-on and skinless; whole Jonah crab; sheepshead (1-2½ lb) Red porgy (large) goatfish and groupers.

Mr. Eustache G. Koukos
Eustache G. Koukos & Co.
126 Kolokotroni & Skouze Str.
Piraeus, Greece
Tel: 452 8414/6
Tlx: 21 2586 Kouk Gr

Interested in smoked
herring Dutch style. Could
send technical advisor to
help new suppliers.

Mr. Theodore Sotirellos
Frozex (Import-Export Frozen
Products Co.)
2 J. Dragatsi St.
Piraeus, Greece
Tel: 4129613/4129680
Tlx: 213876 Lask Gr

Interested in Loligo squid
(in order of preference;
Loligo vulgaris, Loligo
pealei, Loligo opalescens)
Packs 8-12 cm squid; 3 kg
blocks, 8 blocks to master
carton.

H&G Silver Hake, min. size
3/kg; H&G skin-on dogfish
backs (fins and tail
removed). Prefer Mustelus
spp.

Mr. Antonios Hadjiantoniou
8 Petsou Ralli St.
Athens, Greece

Ippocambos Ltd.
31-33 D. Gounari St.
Piraeus, Greece

Thasassios Triton Ltd.
12 Korinnis St.
Athens, Greece

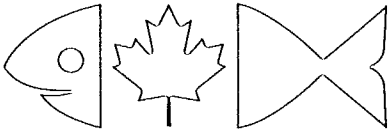
Marina G. Kanta & Co.
7 Kratinou St.
Athens, Greece

Recent C&F Piraeus prices on selected fishery products
(US\$/MT); Flounder; fresh \$3,000, frozen \$2,600; Snapper
frozen \$1,400; Groupers frozen \$2,250; Black Mullet fresh
\$3,000, frozen \$2,250; Goatfish fresh \$2,000, frozen \$1,730;
Octopus (over 1 kg) frozen \$1,730.

Some importers say they would prefer to make payments in
Deutsch-marks or Danish Crowns, rather than in Canadian or
U.S. dollars. This could result in better prices to
exporters.

TARIFF ITEM 16.04

CCN	Short Description	Greek Tariff B - Binding A - Autonomous	EC Tariff		Canadian Supplier Position P - Principal S - Substantial INR - Initial Negotiating Right	1000 Drachmas		Possible Impact
			B - Binding	A - Autonomous		Average Greek Imports 1977/78/89	Reductions (-) Increase in (+) duties collected	
16.04	Prepared fish (tunny, salmon and other salmonidae)							
	- salmonidae (16.04 B)	22% B	6.6% B	5.5% B (salmon 16.04 B)	INR			
			7.0% B	7.0% B (other salmonidae 16.04 B2)	S (1976-8) S (1977-9)	Total 10,858 from CDA 1,913	(-) 286,95 (\$9,036)	
	- tunny (16.04 E)	22% B	24% B	24% B	INR			
16.05 C	Crustaceans and molluscs prepared or preserved	25.0% B	16.0% B	16.0% B Note: some products subject to reference prices under Art. 20 of proposed market organization regulations	INR	---		



**FISHERY MARKET
DEVELOPMENTS**

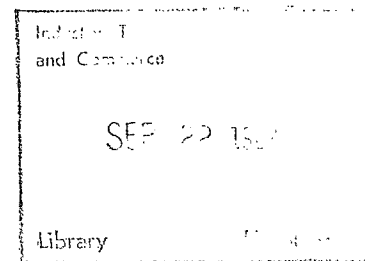
**COMMERCIALISATION DES
PRODUITS DE LA PÊCHE**

FMD NO. 13

SEPTEMBER 1982

FROZEN OR SMOKED FISH TO EGYPT

The following information will be of value to exporters seeking to market frozen or smoked fish to Egypt.



For further information
please contact:
Eon Fraser
(613) 995-8107.

Aussi disponible en français

The following documents are required with each shipment:

- 1) Legalized commercial invoices of one original and 6 copies showing number of cartons, total and net weight, unit price and total price, L/C number;
- 2) Certificate of origin in one original and 3 copies legalized from authorities in country of origin and authenticated from Egyptian Embassy or Consulate in Canada;
- 3) Health certificate in one original and 4 copies issued from official Canadian authorities and legalized from Egyptian Embassy stipulating that fish is free from any illness, parasites, pathogenics, toxins, radiations, fertilizers, anitseptics, suitable for human consumption and that explosion fishing method have not/not been used and fishing zone is radiation free;
- 4) Lloyds certificate of there agent or equivalent showing that the ship is 100 percent suitable for the trip and it is a first class ship registered at the Lloyds or equivalent with an age not more than 15 years;
- 5) Clean complete set of bill of lading issued in in the name of the company in Cairo showing that shipping charges is prepaid;
- 6) Certificate of weight issued from the official weighing authorities showing number of cartons, total and new weight original and 6 copies;
- 7) Copy from the cable sent to the company after shipping showing name of vessel, quantity shipped in metric tons total and net, number of cartons, type, date of shipment and expected date of arrival;
- 8) Payment will not be effected until the local bank, through which L/C was established, receives and official confirmation from the Egyptian Fish Marketing Co. which will be issued immediately after receiving the official certificate from local Health and Veterinary Authorities approving the goods.

Labelling Requirements: According to new law and regulations, the following must appear on each carton in Arabic: 1) name of produce; 2) name of producer; 3) quote made in Canada unquote; 4) net and gross weight; 5) date of production and expiry; 6) ingredients; 7) keep frozen below 0 C; 8) name of importer.

N.B. Post strongly recommends that fish to be insured against health reject in Lloyds or any similar international firm with the understanding that such insurance will cost 1.5 to 2 percent.

to control imports of frozen fish.

Art. I Frozen fish are the sound unpoisonous fish suitable for human consumption which had been preserved by quick freezing methods.

They should show the following provisions: -

- 1) They should be clean, firm, free from signs of putrefaction, having natural colour and odour and keeping their natural appearance.
- 2) Freezing should be done by perfect technical methods provided that no drained water and/or drip should be left at thawing.
- 3) Fish should not be treated by antibiotics and/or chemical preservatives.
- 4) Temperature of ship holds during the journey from exportation port to destination should not exceed -10c.
- 5) Frozen fish should be free from harmful germs and food poisoning. Fish should not be caught by explosives and/or from localities polluted with radiation, fertilizers and/or insecticides.
- 6) Every consignment should be accompanied by a certificate issued from the veterinarian authority stating the date of freezing and attesting that consignment is free from poisons, contagious diseases and suitable for human consumption.

Art. II Frozen fish are imported according to the following form: -

- A) Whole fish: where fish show tails and fins and should be free from injuries. It is permissible to import fish undrawn with heads and they should be free from traces of blood.

- B) Steaks: which may be: -
- a) Boned steaks - which are steaks free from spines, bones and skin.
 - b) Partially boned steaks - which are steaks free from bones only.
 - c) Unboned steaks - which are steaks containing spines, bones and skin.

Art. III Packing

- 1) Whole fish - are arranged in water-proof cellophane packages or any other similar, then put in either wooden or carton boxes; provided that fish should be of the same kind and nearly of similar weight. Packages should be uniform in the individual consignment.
- 2) Fish steaks are arranged in water-proof wooden or carton boxes provided that partitions of cellophane or any other similar should separate the steaks so as not to stick together. Steaks in the individual box should be similar regarding the part cut from the fish, however, a tolerance of not more than 50 grammes is allowed in weight as for steaks in every individual package.

In general, packing should show the following: -

- A - Contents of every package should be of one kind and nearly of similar weight.
- B - The following statements should be declared on every package: -
 - 1) Name and trade mark of producer and producing country.
 - 2) Kind of fish and method of dressing.

Order No. 1404/1975

to control imports of Smoked fish.

- Art. I Smoked fish are the fresh fish suitable for smoking which are dressed, cured and exposed to get their surface dry (shelling). Then they are exposed to smoke resulting from uncomplete slow burning of special kinds of wood in "smoking houses" where smoke penetrates all tissues of fish giving the final product the characteristic taste and odour of smoked fish such as: herrings, eels and salmons.
- Art. II Smoked fish should show the following provisions: -
- a) They should be fresh intact free from signs of putrefaction and foreign odours. They should have smooth compact scales and should be drawn in case of feedy fish.
 - b) They should be homogenous in size and kind.
 - c) They should be free from coliform, food poisoning, parasites and fungi.
 - d) Utilized salt should be free from impurities. Salt content in the final product should not be less 4% and should not exceed 8%. Moisture content in final product should not be less than 50% and should not exceed 55%.
 - e) Fish should be treated by natural smoke and attaining its odour. They should show a golden natural colour of such products and it is completely prohibited to use pigments.
- Art. III Holds of storage for smoked fish should not exceed zero to 1c during the period starting from the terminal of processing up to consumption thereof. This period should not exceed 6 months in cold smoking and two months in hot smoking.

Art. IV Temperature of smoking houses in cold smoking alternates from 27 - 32c for 3 - 14 days according to kind and size of fish, however, in hot smoking the process occurs at 55 - 90c for a period 4 - 10 hours.

Art. V Packing: - Smoked fish are packed in layers into packages of carton or wood. Packages should be lined by suitable paper-proof and layers of fish should be separated so as to avoid sticking with each other and keep its appearance.

Art. VI External statements: -
The following statements are shown in legible and fixed writing: -

- 1) Name of producing country.
- 2) Name of producing factory, its address and trade mark.
- 3) Kind of smoked fish.
- 4) Method of smoking (cold or hot).
- 5) Number of fish and weight gross/net.
- 6) Date of smoking.
- 7) Seal of export control.

Art. VII Every consignment should be accompanied by a certificate issued from competent hygienic authorities attesting that it is free from diseases and suitable for human consumption.

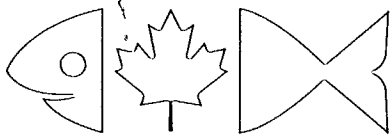
- 3) Net weight after thawing.
- 4) Date of freezing.
- 5) Seal of export control.

Order No. 339/1980

amending Order 1404/1975 to control imports
of smoked fish.

Art. I Paragraph (c) of Art. II concerning provisions of
smoked fish mentioned in Order 1404/1975 is amended
to become as follows:-

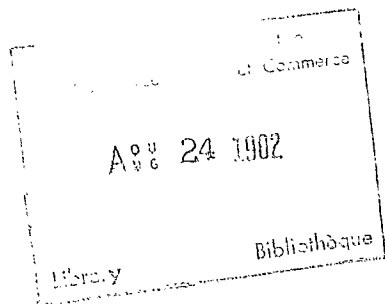
"They should be free from coliform, food poisoning
living parasites and fungi harmful to common
health."



**FISHERY MARKET
DEVELOPMENTS**

**COMMERCIALISATION DES
PRODUITS DE LA PÊCHE**

FMD NO. 12



SEPTEMBER 1982
SEPTEMBRE 1982

FISH MARKETS - IVORY COAST

MARCHES POUR LE POISSON: COTE D'IVOIRE

Attached is a report from the Trade
Commissioner in Abijan concerning fish market
opportunities in the Ivory Coast.

Vous trouverez ci-joint un rapport de notre
Conseiller commercial en Abijan sur les
opportunités de marché pour le poisson sur la
Côte d'Ivoire.

Also available in English
Aussi disponible en français

Fish Markets - Ivory Coast

While there has been no discernible followup to the April 1981 fisheries products mission, importers in the Ivory Coast continue to ask for quotes, particularly for frozen mackerel.

Market Potential

More than 75% of the Ivory Coast's protein needs are met by fish and annual consumption is a high 30 kg/capita.

Total consumption is 220,000 tonnes which is forecast to rise to 350,000 t by 1990. Part of this increase will be met from aquaculture and improved lagoon fisheries which are part of the Ivory Coast development plan. However, the major part will continue to be imported.

Local Catches

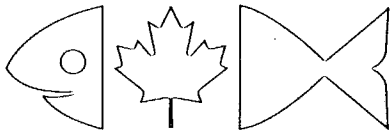
An estimated 5,000 tonnes of fish was taken in 1980 from lagoon and artisanal fisheries, while the main commercial fishery has stabilized at about 60,000 t.

With a narrow continental shelf the Ivory Coast depends largely on imports to fulfill its fish needs. The major suppliers are the U.S.S.R., Poland, and the Netherlands. Mackerel is one of the most popular imports in the 1-3 kilo size. Current prices, CIF Abijan, are US \$430 per metric tonne.

The Post at Abijan continues to encourage local importers to place orders in Canada, and suggests cooperative exporting and shipping arrangements in Canada to keep freight prices competitive, with 2,000 to 3,000 tonne shipments recommended.

For further information contact:

Eon Fraser (613) 995-8107



FISHERY MARKET DEVELOPMENTS

COMMERCIALISATION DES PRODUITS DE LA PÊCHE

Industry, Trade and Commerce	Industrie et Commerce
AUG 13 1982	
Library	

FM NO. 11

August 1982

Attached is a report on the fish related papers which were presented at the 1982 Annual Meeting of the Institute of Food Technologists held in Las Vegas, Nevada, June 22 to 25, 1982.

Vous trouverez ci-joint un rapport sur les mémoires relatifs à l'industrie de la pêche qui ont été présentés à la réunion annuelle 1982 du "Institute of Food Technologists" qui c'est tenu à Las Vegas, Nevada du 22 au 25 Juin, 1982.

Also available in English

Aussi disponible en français

Institute of Food Technologists
Annual Meeting - Las Vegas, June 1982

The 1982 annual conference of the Institute of Food Technologists was held in Las Vegas from June 22 to 25. There were major symposia on food irradiation, botulism, and frozen foods which will be reported separately and two half-day technical sessions plus a number of individual papers on fish handling and processing.

The fish related papers covered the causal mechanism and control of various types of quality deterioration, processing techniques, microbiological problems, and handling systems. Some of the work had been done by graduate students who were scientifically competent but who lacked the experience to recognize all the sources of variation which could be affecting their samples or experimental conditions. The quality of the work was nevertheless good and the results were meaningful.

During the conference a seafood products technology group was formed within the framework of the Institute. About 100 members representing government, academic and industry interests joined this new group. It will organize symposia and technical presentations for future conferences and, by its very existence, will facilitate the kind of interpersonal contact that should lead to better co-ordinated and more relevant research in the future.

The number of scientific papers presented and the fact that such a large number of people responded to the organizational call for this new group are indicative of the rapid growth in fisheries related research and development in the United States and in the importance being assigned to the fishery sector within the American food industry.

In the individual fishery related papers presented the following were of particular interest. Abstracts of all of the fishery related papers are attached.

Fish Processing

A team from the University of Washington described (paper 144) how the texture and flavour of fish in batter could be improved for microwave oven cooking by substituting oil for water in the batter formula (they used partially hydrogenated soybean oil) along with a waxy maize starch.

R.K. Rockower of the University of Florida in Gainesville reported on the effect of minced fish formulations on the quality of fish patties. Turbot scored higher than pollock.

Fish Handling and Storage

Walter Spiess from the University of Karlsruhe in West Germany (paper 204) reported that quality retention was improved as freezer temperatures were reduced, even below what are considered to be commercially necessary levels. For example, silver hake and redfish maintained acceptable quality for 10 months at -15°C and 19 months at -20°C . Cod fillets had a shelf life of 4.1, 6.3, 8, and 12 months when held at -12 , -15 , -18 , and -25°C respectively. Between -10 and -30°C most time/temperature graphs are linear so that to that temperature at least there is a directly proportional storage life benefit from lower temperatures. Thawing and refreezing reduces shelf life significantly. For example, frozen at sea cod fillets (factory ship product) have a shelf life of 12 months at -25°C but fillets cut from previously frozen round fish have a shelf life of only 4 months at -25°C .

In the German distribution system, the average frozen products warehouse temperature is -20 to -30°C . The average display cabinet temperature is -3 to -30 depending on position in the cabinet.

In West Germany, 50% of the fish sticks and cod fillets pass through to the consumer in two months. Only 10% are in the chain for 8 months and no product remains in central storage longer than two months. Top quality cod sticks reach the lower acceptable quality limit in $7\frac{1}{2}$ months at -15°C . Sticks of poor initial quality reach this point in only four months.

Dr. Anthony Wiley presented a paper prepared by P. Herrera from Fundacion Chile in Santiago, Chile on polyphosphates in hake fillets. They used merlucius gayi-gayi (Chilean or Peruvian hake, a south-eastern Pacific species).

In Chile, the per capita consumption of fish was dropping, partly due to shortening of shelf life and drop in quality. Polyphosphate was used to reduce drip loss and improve colour, texture and flavour retention. Using 1% tripolyphosphate and 3% salt they reduced weight loss by 8%, and increased shelf life to 6 days (on ice).

Most consumer product fish in Chile is sold from bulk (not pre-packaged) in wooden boxes with no refrigeration. The use of plastic trays, ice and pre-packaged frozen fish is in the early stages of market development. For the most part, fish competes with red meats and poultry and is handled in the same way.

Robert L. Collette, University of Rhode Island, reported (paper 334) on the efficiency of various on-board icing systems for maintaining fish quality. In order of increasing effectiveness the stowage was:

1. Regular fresh water ice.
2. Ice and sea water.
3. Enzyme treated ice and sea water.

Enzyme used was a glucose oxididase catalase system. This is an anti-oxidant. The most effective mixture was 1 unit/ml of enzyme in a 1% glucose system.

Fish Quality

Dr. A. Khayat of Hunt Wesson Foods (formerly with Van Camp Sea Foods Inc.) presented a paper (# 251) on lipid oxidation in seafoods which covered the chemical mechanisms involved in the oxidation of fats in fresh and frozen seafoods. He pointed out that protein oxidation and other oxygen consuming reactions also occur along with lipid oxidation and that the effects on the product include changes in texture (toughening in poorly stored frozen seafoods) as well as changes in flavour, odour and appearance.

There are more free fatty acids in the flesh than in the skin but those in the skin oxidize much faster and their reaction is autocatalytic. Oxidation is accelerated by heat, light, ultraviolet radiation and dehydration. This last factor should be noted particularly because it can be prevented or retarded by proper glazing.

Oxidation of mackerel goes much more rapidly at -15°C than at -40°C and is accelerated by the presence of iron and copper ($\text{Fe } 2+$ and $\text{Cu } 2+$) ions.

Of anti-oxidants commonly used, order of decreasing effectiveness in mackerel is TBHQ, 5% alpha tocopheral, 5% TEMPH, 0.02% BHA, and BHT.

Browning reactions, enzymatic and non-enzymatic, can also cause deterioration of fish starting from lipid peroxides, colourless precursors that are chemically changed to coloured compounds or by brown pigment formation. Some of these reactions can be prevented by immediate chilling of the fish to prevent the enzymatic activity.

Ms. Sue A. Miller from the Institute of Marine Resources at the University of California in Davis presented a paper (# 332) on the use of potassium sorbate (KS) tetrasodium ethylene diamine tetraacetic acid (EDTA), and chlorotetracycline (CTC) in the preservation of vacuum packed rockcod fillets. Unfortunately Ms. Miller's work was poorly planned and carelessly done. She used commercially purchased fish thus invalidating her controls, she equated spoilage to bacterial spoilage thus ignoring the effect of chemical and biochemical changes and her conclusions were reached on the basis of rather meagre and non-specific experimental results. Despite that, her results are probably directionally useful. Fillets dipped in a 1% KS/5 ppm CTC solution before vacuum packing appeared to have lower plate counts, lower bacterial growth potential and better organoleptic scores than EDTA/CTC treated or untreated samples.

Fish Microbiology

Dr. Jack Matches of the University of Washington College of Fisheries in Seattle spoke on the use of indicator organisms to judge the previous history of fish and shellfish (paper #217). Since fish from unpolluted water don't have mammalian bacterial flora, the presence of such genera as *Vibrio*, *Enterocolytica* and *Clostridium* can indicate poor environmental history. Since shellfish are filter feeders which tend to concentrate contaminants from the water and, since many shellfish are eaten raw, an indication of environmental quality can be important. Vertebrate fish will have a standard plate count of 100 to 1000 per sq. cm of skin when taken from clean water but careless handling can introduce post harvest contamination which can be misleading.

In the period 1970 to 1978 11% of the foodborne disease outbreaks were blamed on fish. Out of 233 incidents, 19 were botulism, 16 were identified as other bacteria, 61 were of unknown cause and 58 were identified as of non-microbial origin.

In shellfish, most of the cases were unknown or of non-microbial origin and only 5 of 60 incidents could conceivably have been detected in advance using bacterial indicators.

Using fecal coliforms as indicators can also be poorly correlated to the presence of pathogens because many species such as *Vibrio cholera* and *V. parahemolytica* don't correlate.

Thus it would seem that the use of indicator organisms in evaluating fish and shellfish can be useful in establishing the quality of previous environment and as evidence of good manufacturing practice but not as a reliable indicator of the presence or absence of mammalian pathogens.

INSTITUTE OF FOOD TECNOLOGISTS

1982 ANNUAL MEETING

ABSTRACTS FISH PAPERS

Shelf life extension of fresh finfish and scallops with potassium sorbate as a function of concentration and method of application—D.R. WARD, P.F. Butler, D.J. Hopson & J.A. Daniels, VPI & SU Seafood Processing Research Lab, P.O. Box 369, Hampton, VA 23669

Marketable forms of selected finfish species and scallops were treated with various concentrations of potassium sorbate using different means of application. Factors used to assess the quality of the treated and non-treated samples were: surface pH, NH_3 as measured by an ammonia specific-ion electrode, aerobic plate counts, psychrotrophic plate counts, taste panel scores, and torry-meter scores where appropriate.

71— Difference in lipid composition between fresh water prawn (*Macrobrachium rosenbergii*) and marine shrimp—J. DONOVAN, P. Chamugam & D.H. Hwang, Louisiana Agricultural Experiment Station, Human Nutrition & Foods, Home Economics Bldg., Louisiana State U., Baton Rouge, LA 70803-4300

Total lipid content of fresh water prawn (FWP; *Macrobrachium rosenbergii*) was much greater than that of marine shrimp (2.9 vs 1.3%). This was primarily due to the greater concentration of triglycerides in FWP lipids as compared to marine shrimp. The percent of polyunsaturated fatty acids (PUFA) in FWP lipids was also greater than that of marine shrimp (22.8 vs 18.5%); this was due to greater concentration of linoleic acid in FWP lipids (14.4 vs 1.1%). These results implied that fresh water shrimp are more susceptible to quality deterioration during processing or storage than marine shrimp as autooxidation of PUFA is an important factor affecting deterioration of edible quality.

72— Influence of processing temperature on the distribution of water-soluble proteins in Blue crabs—O.G. Dowdie & S.L. BIEDE, Dept. of Food Science, Louisiana Agricultural Experiment Station, Louisiana State U., Baton Rouge, LA 70803

The distribution of water-soluble proteins in Blue crabs was determined using SDS-PAGE in conjunction with photodensitometry. Thirty protein subunits were found in the water soluble fraction ranging in molecular weight between 130,000 and 12,000. Major subunits had molecular weights ranging from 108,000—72,000. Processing Blue crabs in water (70—100°C) resulted in a significant reduction of water-soluble proteins as the processing temperature increased. Also, an increase in processing temperature resulted in an increase in the pH of the meat due to the freezing of basic groups on the proteins.

73— Washing and antioxidant treatments and properties of minced carp (*Cyprinus Carpio*) flesh—T.E. Rippen, J.F. PRICE & R.M. Gartner, Food Sci. Dept., Mich. State U., East Lansing, MI 48824

Deboning yields, the effects of antioxidants on lipid stability and the effects of washing minced flesh with various solutions were assessed. Yields of carp on deboning were 42% of round fish weight. Tenox 2 was more effective than "Freez-gard" as an antioxidant for carp mince (13—25% fat). Washing the flesh generally reduced yield, color intensity and heme pigments and decreased flavor intensity and TBA numbers of stored flesh. Sodium bicarbonate washes and addition of hydrogenated fat improved overall acceptability.

Acceptability and preferred processing of controlled environment aquaculture shrimp—A.M. TINSLEY, L.B. Colvin & J.W. Berry, Dept. of Nutrition & Food Science, U. of Arizona, Tucson, AZ 85721

Acceptability of controlled environment aquaculture (CEAq) shrimp and the preferred processing method for this product was investigated by sensory evaluation and chemical analyses. Triangle, paired preference, ranking and acceptability tests were conducted. Chemical determinations included pH, glycogen, lactic acid and water activity. Hydration. Tests were conducted using frozen wild shrimp and CEAq shrimp processed by four methods. CEAq shrimp were highly acceptable and preferred ($p \geq 0.05$) over wild shrimp. Short-term freezing proved the most desirable processing method as determined by both chemical and sensory evaluation.

Mechanical drying of mullet roe: Effect of varying temperature and dewpoint on the development of a salted-dried product—J.J. Heins, J.C. DENG, K.V. Chau & C.D. Baird, Dept. of Food Science & Human Nutrition, U. of Florida, Gainesville, FL 32611

Salted mullet roe was dried in a mechanical drier using three dry bulb temperatures (31.1, 36.7 and 45°C) and dewpoints (6.4, 11.9 and 19.7°C) in order to develop a satisfactory dried product. Color (Hunter L value), Moisture content (dry basis) and moisture ratios were measured and multiple regression equations developed to fit the data. It was possible to obtain a satisfactory product for both pressed and non-pressed roe at 31.1°C. Higher temperatures often led to roe darkening before reaching an acceptable moisture content (25% wet basis). Energies of activation for the drying constant and also rate of browning were found.

107— Comparison of HPLC and mouse bioassay methods for determining PSP toxins in shellfish—J.J. SULLIVAN, M.G. Simon & W.T. Iwaoka, Institute for Food Science & Technology, U. of Washington, WH-10, Seattle, WA 98195

Paralytic shellfish poison (PSP) toxins in contaminated shellfish were analyzed and quantified using both a high pressure liquid chromatographic technique and the standard AOAC mouse bioassay method. High correlation between both assay methods was obtained when shellfish samples contained about 60 µg toxin/100g meat or less. There was an average variation of 25% when higher amounts of toxin were present. Variation in the mouse bioassay itself is ± 20%.

Absence of toxic effects associated with feeding the flavonol quercetin to rainbow trout (*Salmo gairdnerii*)—T.C. LEE, S.M. Plakas & R.E. Wolke, Dept. Food Science & Nutrition, U. of Rhode Island, Kingston, RI 02881

Quercetin is one of the more common edible plant flavonol compounds, and is present in several foods. Quercetin has been found to be mutagenic by the Ames Salmonella/mammalian microsome mutagenicity assay and other in vitro methods, and a carcinogen for the rat. The toxicity associated with long term feeding of high levels (1 and 5% of diet) of quercetin using rainbow trout as the experimental animal was investigated. There were no effects associated with feeding quercetin on mortality, growth and feed efficiency, certain blood parameters, relative organ weights and normal histology of the major organs.

144— Effect of microwave cooking on texture characteristics of battered and breaded fish products—L. LOPEZ-GAVITO & G.M. Pigott, Institute for Food Science & Technology, WH-10, U. of Washington, Seattle, WA 98195

Resulting texture after microwaving battered and breaded fish products was found to be the major problem concerning the use of microwave energy in place of deep-frying for processing such products. Texture was highly improved when the conventional batter formulation was modified by substituting the water for partially hydrogenated soybean oil, and using a modified waxy maize starch in the batter slurry. Sensory scores given to the microwaved products with the modified batter and breading formulation were similar to those given to the deep-fried products. The first choice preference ranking after freezing and reheating was given to the microwaved products.

Relationship of bacteriological indicators and physical and chemical parameters to the numbers of *Vibrio parahaemolyticus* in oysters, water, and sediment—C.R. HACKNEY, R. Corrick, M.D. Sobsey & B. Ray, Dept. of Food Science, Louisiana State U., Baton Rouge, LA 70803

Periodic samples of oysters, water, and sediment were analyzed for *Vibrio parahaemolyticus* bacterial indicators, i.e., coliforms, fecal coliforms, enterococci, and aerobic plate count. In addition a number of physical and chemical parameters were noted at the time of sampling. Good relationships existed between the levels of *V. parahaemolyticus* and water and air temperature. No other bacteriological chemical or physical parameter was related to *V. parahaemolyticus* levels.

Evaluation of various commercially available media for the recovery of enterococci from seafoods—R.J. ALVAREZ, K. Strauss & A. Grunnet, GIBCO Laboratories, Div. of Dexter Corp., 2801 Industrial Drive, Madison, WI 53713

The selectivity of five commercially available media (CEM, Selective Streptococci, GTC, KF, Mf-Enterococci with MF-PYC Enrichment) was evaluated for the isolation and enumeration of enterococci from seafoods. The data indicated that the presumptive enterococci counts obtained on CEM, GTC, KF and Selective Strep agars was not significantly different. In terms of selectivity, all five media yielded relatively high percentages of enterococci. Advantages for using GTC, CEM and Selective Strep include short incubation time (18—24 hr), rapid enumeration, and confirmation.

189— A new procedure for the differentiation of *Vibrio cholerae* and non of *V. cholerae* recovered from oysters—M.C. BURNS, E.R. Richter, G.J. Banwart & M.S. Rheins, The Ohio State U., 484 W. 12th Ave., Columbus, OH 43210

Oysters were inoculated with *Vibrio cholerae* and non of *V. cholerae*. They were incubated at 25°C for 48 hr. The liquor from the oysters was then inoculated onto T.C.B.S. agar for 24 hr at 37°C. The colonies with blue centers were picked. Biochemical tests were performed and those with the appropriate results were grown in yeast extract glucose broth for 24 hr and analysed for lactic and succinic acids by gas chromatography. Peak height ratios of lactic/succinic acid provided a testing parameter to distinguish *V. cholerae* from non of *V. cholerae* isolates recovered from the oysters.

Storage stability of deep-frozen food materials—W. SPIESS, U. of Karlsruhe, West Germany —204

The storage stability of deep frozen food depends on a variety of factors, most prominent are storage time and temperature; however, also variety, processing and package are of importance. On the basis of more than 2,000 individual storage data the influence of the different factors is discussed. Furthermore, the existing time-temperature tolerance (TTT) concept is assessed in a critical way. Recommendations for the design of storage processes are given.

217— Indicator organisms in fish and shellfish—J. MATCHES, Dept. of Food Science, College of Fisheries, U. of Washington, Seattle, WA

A number of bacteria have been used as indicators of pollution or contamination in drinking water and foods. Many of the organisms used as indicators in other foods have also been useful in fish and shellfish. Several species of bacteria, most commonly waterborne, may also have application for use as indicators in marine products. These organisms include members of the genera *Vibrio*, *Enterococlytica* and *Clostridium*.

Microbiology of rockcod stored under modified atmosphere—K. MOKHELE, E. Barrett, A. Johnson & D. Ogrzydzak, Institute of Marine Resources, U. of California, Davis, CA 95616 —224

Fresh rockcod fillets were stored in air or modified atmosphere (80% CO₂/20% air) at 4°C. At intervals of 0, 7, 14, and 21 days, samples were removed and analyzed for microbial load. The enumeration plates were incubated aerobically at 4°, 20° and 35°C; under modified atmosphere at 4°, 20° and 35°C and anaerobically at 35°C. At all incubation conditions, the counts obtained from modified atmosphere samples were consistently lower than counts from air control samples. At 20°C in air, the plate counts were the highest of any of the conditions examined and isolates grew rapidly enough for plates to be counted after 2–3 days.

Lipid oxidation in seafoods—D.V. SCHWALL & A. Khayat, Van Camp Sea Food Company, Ralston Purina Company, 4245 Sorrento Valley Blvd., San Diego, CA 92121 —251

Oxidation of unsaturated fatty acids or triglycerides involve the formation of free radicals and hydroperoxide. Such intermediary compounds are unstable and cause oxidation of pigments, flavors and vitamins. After polymerization, hydroperoxides form dark colored organic polymers. Other compounds, such as ketones, aldehydes, alcohols, hydrocarbons, acids and epoxides are formed during oxidation of unsaturated fatty components. Lipid oxidation takes place in fresh and frozen seafood and could be catalyzed by metal ions. Oxidized unsaturated lipids bind to proteins and form insoluble lipid-protein complexes. These account for the toughened texture of poorly stored frozen seafoods. This review covers the mechanism of oxidation of unsaturated fatty components of seafood; enzymatic and nonenzymatic oxidation of fresh and frozen seafood; browning reactions of oxidized fish lipids with protein and metal catalyzed lipid oxidation.

329— Effects of refrigerated seawater, brine freezing and thawing on the sodium chloride penetration and microstructures of skipjack tuna—H.M. SOO, C.L. Lanning, R.D. Sullins, S.T. Heck & D.K. Adams, Ralston Purina Company, Checkerboard Square, St. Louis, MO 63188

The scanning electron micrographs showed the changes in muscle microstructure of skipjack tuna during refrigerated seawater, brine freezing, and brine thawing treatments. Major alterations in muscle microstructure and increases in salt penetration occurred during brine freezing. The muscle fibers of fresh skipjack tuna are smooth, compact and parallel. However, throughout chilling, freezing, and thawing these fibers become loose, forming gaps and allowing salt easier access to the muscle tissue.

330— Water conservation and effluent reduction by water recycling in Pacific shrimp processing—L.A. NIELSEN, R.J. Price & P.A. Carroad, Food Science & Technology, U. of California, Davis, CA 95616

At a Pacific shrimp (*Pandalus jordani*) processing plant, water use and the bacterial load of the shrimp meat was monitored. A flow-chart was made showing water use. From this and the microbiological data, designs were suggested involving reuse of the flume water. A pilot system was fabricated to test several recycling methods. No significant change in bacterial load was observed when counter-current circulation of flume water was used. A greater decrease of bacterial load was observed when the water was pre-chlorinated.

331— Use of polyphosphates and NaCl in refrigerated, pre-packaged Hake (*Merluccius gayi-gayi*) fillets—E. Arrieta, P. HERRERA, G.G. Giddings & E. Wittig, Fundación Chile, Casilla 773, Santiago, Chile

Hake (*Merluccius gayi-gayi*) fillets were treated with various mixtures of polyphosphates and NaCl in different concentrations, packaged in trays and covered with PVC film. The samples were stored under refrigerated conditions (2–3°C) for a period of 12–15 days. The controls made on the samples were: (1) Weight loss during storage; (2) Liquid detection in the package; (3) Phosphate content in the fillets; (4) Microbiological count; (5) Physical-organoleptic analysis of the fillets. The best results were obtained with fillets treated with a mixture of T.P.P. (1%) and NaCl (3%). This product was kept without loss of liquid for a period of 6 days in storage at 2°C and with a weight loss of less than 1%.

Effectiveness of chlortetracycline in combination with potassium sorbate or tetrasodium ethylenediaminetetraacetate for preservation of vacuum packed rockcod fillets—S.A. MILLER & W.D. Brown, Institute of Marine Resources, Dept. of Food Science & Technology, U. of California, Davis, CA 95616

Rockcod fillets were dipped in either distilled water, a solution of ¼ Na₂EDTA plus 5 ppm chlortetracycline (CTC), or 1% K-sorbate plus 5 ppm CTC. After dipping, fillets were vacuum packed and stored at 2°C. Samples were evaluated after 0, 3, 7, 10, 14, and 21 days. The sorbate/CTC group differed less from fresh fillets than the controls for the entire storage period with respect to all indices measured (plate count, pH, redox potential, and TMA and NH₃ levels). Fillets treated with EDTA/CTC differed more from fresh fillets than the sorbate/CTC group but less than the controls. Results were corroborated by sensory analyses.

Effect of washing of the mince on the textural quality of a frankfurter-type product prepared from mechanically recovered mackerel flesh—P.M. AROCHA & R.T. Toledo, Dept. of Food Science, U. of Georgia, Athens, GA 30602 —333

A frankfurter-type product prepared from washed and unwashed mince were evaluated for texture by a sensory panel and by rheological measurements. Texture profile character notes of products from unwashed mince had higher values than those from the washed mince. Instrumental texture profile measurements for hardness, puncture force, shear stress, and apparent viscosity of raw batter, also showed higher values for the unwashed compared to those prepared from washed mince. Products from washed mince had better color than those from unwashed material, but the latter were given higher general texture acceptability scores by the sensory panel.

SHANN-TZONG

Effect of on-board fish stowage systems on the quality of New England ground fish—R.L. COLLETTE, J. Wu, L.F. Jacober, J.L. Howe & A.G. Rand, J.A., Dept. of Food Science & Nutrition, U. of Rhode Island, Kingston, RI 02881 -334

Freshly caught scup (*Stenotomus chrysops*) were stored in four holding systems: (1) seawater and regular ice (SRI), (2) seawater and enzyme treated ice (SEI), (3) boxing in regular ice (RI), and (4) boxing in enzyme treated ice (EI). Torrymeter values were higher for fish from all four holding systems after 5 days of stowage when compared to controls. Controls also exhibited slightly increased hypoxanthine levels initially. After 12 days postharvest, fish held in treatments SRI, SEI and EI illustrated decreased ammonia content and consistently higher raw odor scores. Stowage utilizing SRI, SEI and EI generally improved the maintenance of quality.

Application of ion exchange chromatography for the recovery of protein from hard shell clam processing effluent—S.N. JHAVERI, S.M. Barnett & A.G. Rand Jr., Dept. of Food Science & Technology, Nutrition & Dietetics, U. of Rhode Island, Kingston, RI 02881 -335

An industrial grade DEAE-cellulose resin was used in ion exchange chromatographic separation of protein from hard shell clam processing effluent. More than 70% of the protein was recovered from the effluent, which contained 0.2–0.3% protein, 98–99% water and 1–2% solids at pH 7.0. Isoelectric precipitation of the effluent with 10N HCl, recovered 46% protein. Microgas dispersion, a modified air flotation process, was employed in generating foam in the effluent. The use of surfactants, the resulting foam produced 50% protein recovery. inc-D

Can shrimp toughness as a function of its heat history—L.Y. MA, J.C. Deng, E.M. Ahmed & J.P. Adams, Food Science & Human Nutrition Dept., IFAS, U. of Florida, Gainesville, FL 32611 -336

Texture changes of shrimp after thermal processing at 115, 124, 133, and 140 C were determined. Shrimp muscle toughened during the initial stages of heating, softened during the latter stages, and approached a steady state texture after prolonged heating. A direct relationship was found between sensory scores of toughness and shear forces (Instron shear test). The softening of shrimp texture (shear values) followed pseudo-first order behavior and yielded an E_a value of 24 kcal/mole ($z_T = 30^\circ C$).

337— Salt penetration rate and changes in protein and nitrogenous compounds during brining of mackerel (*Scomber australasicus*)—B. SUN PAN, C.P. Tang, S.W. Luo, J.M. Kuo & C.Y. Shiau, Institute of Marine Food Science, National Taiwan College of Marine Science & Technology, Keelung, Taiwan, R.O.C.

Salt penetration varied with parts of fish and pre-brining condition: increased brining temperature in the range 4–30% increased salt penetration; a 20% brine concentration resulted in faster salt penetration than 15%; VBN and pH value did not change but hypoxanthine increased. Histamine increased in the first 2 hr then decreased but formation was inhibited at brining temperatures above 30°C.

338— Effect of some immersion treatments on the prevention of browning discoloration and drip loss of frozen shucked oyster (*Crassostrea gigas*)—S.T. JIANG, T.C. Lee & C.O. Chichester, Dept. Marine Food Science, National Taiwan College Marine Science & Technol., Keelung, Taiwan, R.O.C.

Some relatively simple and efficient treatments were developed for preventing both discoloration and drip loss from frozen shucked oysters. It was shown that fresh shucked oysters were immersed for 15 min in one of the following solutions at a solution temperature below 5°C: (1) 3% NaCl + 1% Na-erythorbate; (2) 3% NaCl + 1% erythorbic acid; (3) NaCl + 1% Na-ascorbate. After individual Quick Freezing treatment, an ice glaze treatment was performed with solutions (1), (2) and (3) used in the immersion treatment. After 1 yr of storage at -20°C, the quantity of drip loss was reduced from 30.2% (w/w) in the control to 12.1, 13.4, and 14.2% in oysters treated with solutions (1), (2) and (3), respectively, and no discoloration was observed during frozen storage. No significant differences for over-all acceptability compared to fresh oyster were found even after 1 yr of storage at -20°C.

339— Effect of soy flour, soy protein concentrate and sodium alginate on the texture quality of minced fish (turbot and pollock) patties—R.K. ROCKOWER, J.C. Deng, J.A. Cornell & W.S. Otwell, Dept. of Food Science & Human Nutrition, U. of Florida, Gainesville, FL 32611

A mixture surface response statistical design was used to investigate the textural attributes of minced fish patties. Mixtures of fish (bits and pieces of turbot, whiting, sole and pollock) plus sodium alginate, soy flour, and soy protein were evaluated for their effect on patty firmness, flavor, overall acceptance, total protein and fat content, and production cost. Formulations dominated by turbot were softer and received higher flavor and acceptability scores than those composed primarily of pollock. Addition of soy protein increased patty firmness and tended to mask the variation in sensory responses caused by the different combinations of fish. Responses (dependent factors) were also significantly affected by sodium alginate.

394— Pilchard tuna substitute: a sensory and nutritional evaluation—M.L. DREHER, L. Mann & G. Brown, Food & Nutrition Dept., North Dakota State U., Fargo, ND 58105

Sensory and nutritional characteristics of pilchard were evaluated and compared to tuna products. Sensory analysis involved evaluating products both "as is" and in recipes such as a casserole and a salad. Nutritional analysis stressed the determination of protein quality. The triangle evaluation showed pilchard to be significantly different from tuna. Pilchard was better accepted in the casserole and salad than the product "as is." The hedonic evaluation showed pilchard to be significantly different than tuna in appearance, flavor and aftertaste but not aroma and texture.

433— Effect of various types of modified ice on the shelf-life of flounder fish (*Pseudopleuronectes americanus*)—S.T. JIANG, T.C. Lee & C.O. Chichester, International Center for Marine Resource Development & Dept. of Food Science & Nutrition, U. of Rhode Island, Kingston, RI 02881

Semi-dressed and filleted flounder fish (*Pseudopleuronectes americanus*) were preserved with various modified ice. The shelf-life of semi-dressed and filleted samples were extended to 21 and 10 days by being stored in sea-water ice and to 26 and 10 days by being stored in sea-water ice containing 0.05% each of Na-polyphosphate, Na-pyrophosphate and potassium sorbate, respectively, while that of control samples were 10 and 6 days. These dramatic effects of the modified ice combination can be used to reduce the post-harvest losses in fishery products especially in artisanal fishery in developing countries.

- 434- Decomposition of Pacific true cod retail fillets packaged in CO₂-modified atmosphere—B.B. BOONE & J.R. Matches, Institute for Food Science & Technology, WH-10, U. of Washington, Seattle, WA 98195

Pacific cod (*Gadus macrocephalus*) were iced and filleted at day 0 and after 4, 8 and 12 days. Fillets were packed in retail pouches containing air or 50% CO₂, stored at 2°C and sampled at intervals for up to 27 days. Changes in bacterial numbers and types, surface pH, drip loss and gas composition in each package were monitored. During storage, total counts increased with time with MAP fillets exhibiting a slower growth rate. Bacterial populations in both atmospheres became predominantly Gram negative. Highest levels of drip were obtained in CO₂ packs. Carbon dioxide levels decreased and stabilized after nine days storage.

- 435- Physical and biochemical changes in fish muscle after freeze-thaw cycle and temperature fluctuation—C.M. LEE & D. Kazantzis, Dept. of Food Science & Nutrition, U. of Rhode Island, Kingston, RI 02881

Fresh fillets of cod (demersal) and butterfish (pelagic) were subjected to freeze-thaw cycle and temperature fluctuation. The drip loss at each period declined with repeated freeze-thaw cycles, while it steadily increased with extended temperature fluctuations. The moisture retention was also reduced by up to 5% and 10% respectively before and after cooking. Firmness and elasticity of uncooked muscle was not significantly changed during freeze-thaw cycle. Compressive (80% deformation) and shear force of cooked muscle increased progressively with extended freeze-thaw cycle and temperature fluctuation. The increased protease activity measured in the drip was not reflected in the textural changes as evidenced by insignificant difference in textural strength between the samples cooked at 70 and 100°C.

- 436- Water behaviors and functionality in frozen minced dolphin-fish flesh—C.T. SUN & H.H. Wang, U., Dept. of Agricultural Chemistry, National Taiwan Taipei R.O.C.

The thermograms obtained from minced dolphin-fish (*Coryphaena hypurus*) flesh (MDF) at the various levels of 8 cryoprotectants showed that eutectic point of MDF decreased to -20°C in each case of sucrose (0.91m), sorbitol (0.55m) and monosodium glutamate (0.34m). When the frozen (-20°C, 3 months) MDF were studied with the measurement of ATPase, solubility and viscosity of MDF and jelly strength of fish cakes prepared with MDF, the 3 cryoprotectants mentioned above showed the best results at each level indicated above.

- Stability changes in mechanically deboned carp (cyprinous carpio) during frozen storage—Y.M. NAIDU, L.E. DAWSON, N.A. King & M.R. Bennink, Dept. of Food Science & Human Nutrition, Michigan State U., East Lansing, MI 48824

Mechanically deboned Carp (*Cyprinous carpio*) was treated with antioxidants, Freezgard[®], Tenox II[®] and BHA with or without 1000 ppm ascorbate. TBA and FFA monitoring over 11 months of storage at 20±1°C showed Tenox II with ascorbate to be most effective in controlling rancidity (value of 2.67±0.8 and 5.86% FFA). Most of the phospholipid decrease was mainly due to degradation of phosphatidyl choline and phosphatidyl ethanolamine. Significant increase in FFA, decrease in water holding capacity, shear values and protein extractibility occurred at about 8 months of storage.

- Molecular weight and electrical conductivity characteristics of fish protein hydrolysate plasteins—N.E. HECK, G.M. Pigott & A.P. Mackenzie, Institute for Food Science & Technology, College of Ocean & Fishery Sciences, WH-10, U. of Washington, Seattle, WA 98195

An 80% solids peptic hydrolysate of rockfish (*Sebastes* sp.) was incubated with pepsin at 37°C for 24 hr. A plastein gel was formed by recombination of the soluble peptides. The molecular weight range of the substrate fish protein hydrolysate and the plastein were determined by gel chromatography. The freeze/thaw electrical conductivities of the FPH plastein gel and protein gels were compared to determine the similarities of a plastein to a true protein with regard to its geometry and properties.

- Brine shrimp *Artemia* as a protein source for humans—P.C. RON-SIVALLI & K.L. Simpson, Dept. of Food Science & Nutrition, U. of Rhode Island, Kingston, RI 02881

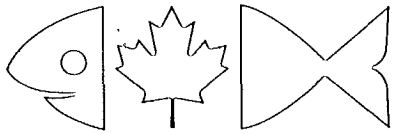
The brine shrimp, *Artemia*, has been studied for its possible use as a protein source in the human diet. This Anostracan crustacean was grown on whey powder or rice bran powder for approximately two weeks in seawater from Narragansett Bay, RI. The water (30 ppt salinity, 26°C) was filtered and UV-treated just prior to the start of culturing and the *Artemia* were analyzed after 48 hours, 7 days and 15 days. Results indicate that *Artemia* can provide highly nutritive animal protein from these low quality diets.

- 442- Cytochemical localization of lysosomes in Coho salmon (*Oncorhynchus kisutch*) muscles with light and electron microscopy—P.H. STEINER, S.H. Broderson & J. Liston, U. of Washington, WH-10, Seattle, WA 98195

The muscle tissue of Coho salmon (*Oncorhynchus kisutch*) was examined by light and electron microscopy to localize muscle tissue lysosomes. For light microscopy, unfixed frozen tissue was reacted for acid phosphatase, a lysosomal marker enzyme. For electron microscopy, fixed tissue was reacted for acid phosphatase. Three different populations of lysosomes have been identified: (1) in connective tissue components, (2) on the periphery of the muscle cell, and (3) within the myofibrils.

- 443- Proteolytic activity in the sarcoplasmic fluid of Pacific whiting (*Merluccius productus*)—M.C. ERICKSON, D.T. Gordon & A.F. Anglemier, Dept. of Food Science & Technology, Oregon State U., Corvallis, OR 97331

Proteolytic enzymes in the sarcoplasmic fluid of Pacific whiting (*Merluccius productus*) were studied to determine which proteases might be involved in the severe textural defect associated with this species. The results were compared to those obtained for true cod (*Gadus macrocephalus*), a fish having firm texture. Three pH of enzymic activity were noted for whiting, pH 3.5-3.9, 4.1-4.5 and 7.1-7.2. Only two pH optima were observed for cod, pH 3.6 and 7.8-8.0. Whiting but not true cod contained enzymic activity similar to cathepsin B. Cathepsin C activity was greater in whiting than in cod.



**FISHERY MARKET
DEVELOPMENTS**

**COMMERCIALISATION DES
PRODUITS DE LA PÊCHE**

FMD NO. 10

JULY 1982

Fisheries Products Situation Report

You will find attached recent information we received from our posts on squid, cod, stockfish and herring.

Aussi disponible en français

1. SQUID

A. FROM JAPAN

1. Japanese summer squid fishery commenced around June 20, and landings of fresh squid have increased in all coastal fishing ports along sea of Japan. Winter and spring fisheries resulted in unusual pattern with larger landings of frozen on board and smaller catches of fresh squid. Change is traced to large school of squid situated in middle and northern areas of sea of Japan along St. Peter the Great Bay. In conjunction with increased landings, price has been declining, but all squid jiggers are enjoying 20-30 percent increase over last year.
2. Scientists forecast that squid fisheries in Sea of Japan will be better than last year (140,000 MT), but estimate of fishery in Southern Hokkaido on Pacific side, which was very poor last year, has not yet been made.
3. Effective June 30, 1982, fisheries agreement with North Korea, which was a private arrangement made by industry, expired. North Korean Government has requested all fishing vessels to leave area. Although squid catch in the area not known, trade observers believe some effect may be experienced in the near future.

B. FROM HONG KONG

1. Current wholesale prices frozen round squid Canadian dollars 0.65 to 1.20 per lb. (depending on size and quality) respectively.
2. Good opportunity exists. In fact Canadian dried squid known and well established. Hong Kong has become significant market for Canadian dried squid during last several years and currently Canada is one of the leading suppliers to this region. However, if supplies available and prices attractive, it is certain that this product can be developed even further here. Frozen squid rather difficult to penetrate to this market due to Canadian species (Illex) too tough and another factor preventing this product to this market is high ocean freight rate.

A. Following is a list of key Dried Squid Importers:

Long Hong
(Import and Export) Trading Co.
53 Bonham Strand
West Hong Kong
Attention: Eric Yu, Managing Director

Wing Loong Hong
70 Bonham Strand
West Hong Kong
Attention Ho Fai, Manager

Fung Sang Trading Ltd.
54-56 Bonham Strand
West Hong Kong
Attention: So Kai Luen, Managing Director

Kwong Tai Trading CO.
217 Wing Lok Street
West Hong Kong
Attention P.H. Lee, Manager

B. Frozen Squid Importers:

Tamarex Marketing Ltd.
Cheong Hing Building, Room 401
Nathan Road Dln.
Attention: Michael Cheng, Managing Director

Fook Wah Trading Co.
6/F Luen Yee Building 6B 315 des Voeux Road
Central Hong Kong
Attention: Lin Shei, Manager

Hop Lee Fisheries Trading Co.
1/F New Wing 102 Shek Pai Wan Road
Hong Kong
Attention: Christopher Law, Managing Director

3. Market data-frozen squid-total imports in 1980 2,055 M/T, 1981 2,270 M/T, estimated 1982 2,400 M/T. Dried squid 1980 2,853 M/T, 1981 2,749 M/T, estimated 1982 2,100 M/T.

A. Annual consumption of frozen squid approximately 5,800 M/T of which 3,700 M/T caught locally and imports from major sources as follows: Singapore 927 M/T, Thailand 764 M/T, New Zealand 408 M/T, Canada 82 M/T.

- B. Annual consumption of dried squid 2,600 M/T including 800 M/T re-exported to other sources and domestic production at 60 M/T, imports as follows: Thailand 919 M/T, Canada 553 M/T, Vietnam 519 M/T, Korea North 311 M/T, China 259 M/T.
- C. Indicative prices frozen round squid-indent prices not available. Wholesale Canadian dollars 0.65 to 1.20 per lb. Retail Canadian dollars 0.80 to 1.50 per lb. Dried squid-indent prices not available. Wholesale Canadian dollars 3.10 to 7.00 per lb. and retail Canadian dollars 4.00 to 8.80 per lb.

C. FROM NORWAY

Norwegian squid fishery foreseen commence August/September. 1980 and 1981 exceptionally rich squid years. 1981 landings 9,113 tonnes dispositions of which 100 tonnes fresh, 4,443 freezing and 4,564 bait. Despite promotional campaign only insignificant squid consumed as food. To encourage fishing, fishermen's sales coop Rafisklaget increased minimum landed prices from January 1982.

1981 Minimum Landed Prices (N. Kroner per kg.):

	For Consumption		For Bait	
	<u>Fresh</u>	<u>Frozen</u>	<u>Fresh</u>	<u>Frozen</u>
Dressed, tubes	2.70	2.70	2.80	2.70
Gutted, head on	2.20	2.20	2.30	2.20
Whole	1.65	1.65	1.75	1.65

1982 Minimum Landed Prices:

Dressed, tubes	3.80	3.80	3.80	3.80
Gutted, head on	3.30	3.00	3.00	3.00
Whole	1.90	1.90	1.90	1.90

For animal and fish feeds: gutted head on 0.60, whole 0.55.

2. Major purchaser is S/L Fiskernes Agnforsyning (Fishermens Bait Coop), Tromso, Tlx. 64110. Coops purchases centered on domestic landings but imports in times of shortage. Suggested private importers: Hoyskel and Wennevold A/S, Gronlandsleiret 31, Oslo 1 Tlx. 71704-Fishery Products A/S, POB 2062, 7001 Trondheim. Tlx 55067.
3. Squid not listed in Norwegian trade stats and import/export figures unknown. Annual Canadian Illex exports to Norway fluctuate and were approximately 1970 tonnes in 1979, 106 in 1980 and 668 in 1981. In all three years average FOB price has been equivalent N. Kroner 3.00 per kg.

2. COD

FROM NORWAY

1. Icelandic landings cod January-May 1982, were 211,320 tons against 281,343 tons January-May, 1982.
2. Latest Icelandic economy report issues April, 1982, forecast decrease in total fish production of seven percent and total decrease fish exports of three percent in 1982. This forecast based on foreseen reduction of capelin landings with presumption that catch of other species remained unchanged.
3. News from Iceland June 1982 reports Union of Icelandic fish producers (UIFP) recently negotiated sale 6,000 tons wet salt fish to Spain at price five percent below 1981. Fridrik Palsson UIFP quoted saying price fall due Faroese competition because Faroese negotiate in Danish Kroner, whereas Iceland negotiate in US dollars.
3. Newspaper also reports UIFP won contract some months ago for sale to Portugals reguladora for between 31,500 and 41,250 tons wet salt fish. Agreed price was also 5 percent below 1981.

3. STOCKFISH

FROM NORWAY

Many Norwegian fishermen produce their own stockfish which sold through Fiskeprodusenters Fellessalg (FF) which again contracts for deliveries to Norwegian stockfish exporters association. Following are recently agreed prices paid by FF to fishermen producers. Prices are per bundle of 20 kg:

Stockfish round or split, africa quality

- (a) Cod and Cusk N. Kroner 540
- (b) Saithe and Haddock N. Kroner 335
- (c) Offal (much reduced quality) N. Kroner 260
- (d) Rejected N. Kroner 110

Stockfish prime and secondary qualities

- (e) Round cod over 200 grams each N. Kroner 670
- (f) Round cod 100/200 grams each N. Kroner 540

4. HERRING

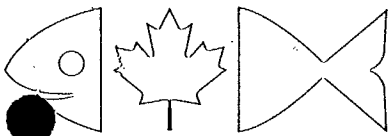
FROM GERMANY

Canadian herring sales in 1981 were down considerably from Canadian dollars 34.2 million in 1980 to only 23.0 million. German consumption in 1981 amounted to approximately 213,500 metric tons which is a decrease of 6 percent versus 1980 when high imports were reported. As a result of insufficient supply and poor quality, too small size on one hand and increased EEC suppliers which reached almost 70 percent of the raw material requirements on the other, North American shipments continued to drop and are expected to further decline in 1982. This development has also to be traced back to the extremely good catches of herring in the North Sea in 1981 providing the German market with almost 60 percent of fresh herring from that source. It is expected that this year the North Sea catch may be further increased and that an even bigger share of the total consumption will originate from European sources.

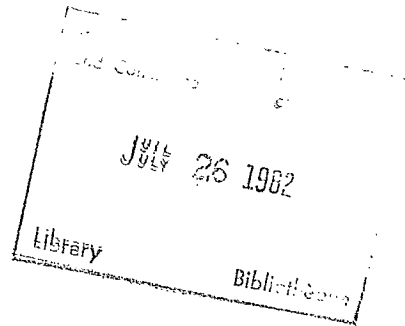
Although at present processors have entered seasonal fall-off in herring consumption which lasts from mid March to end of August, there is a demand for good quality herring 6-8 fish per kg. with a fat content of 12-16 percent. For such a product processors would likely be ready to pay in excess of Canadian dollars 52/lb CIF.

It is reported that neither Canada nor the US are presently offering any herring products. Hence it would be

difficult to state prices. Denmark is said to almost exclusively concentrate on the Dutch market where the ongoing "Matjes" season guarantees high prices. This season ends mid July when Denmark will be back on the German market followed by Sweden where the catching season starts July 1982.



FISHERY MARKET DEVELOPMENTS COMMERCIALISATION DES PRODUITS DE LA PÊCHE



FMD NO. 9

JULY 1982

Situation Report on Japanese Market for Fish Products

You will find attached a report giving a short overview of the 1981-82 Japanese domestic production and trade in fishery products. It covers the main species of Canadian fish sold in Japan.

The report was prepared by the Commercial Division of Industry, Trade and Commerce in Tokyo and reproduced here as per the original telex of June 29, 1982.

Attach.

Aussi disponible en français

FISHERIES PRODUCTS - SITUATION REPORT

Summary - Japanese Government has confirmed that 1981 catch was record 11,336 million metric tons(MT). Good catches have continued into 1982 with volume in first four months estimated at 3.13 million MT, a 2 percent increase over same period 1981. Prices continue firm, averaging yen 152/kg at landing ports vs Yen 147/kg. in 1981. Imports have declined 2.4 percent with most of reduction accounted for by lower imports of fish meal. Prospects appear favourable for good Canadian sales salmon, herring roe, food herring, squid, black cod and capelin during balance of year.

2. Recap of 1981 Japanese fishing. Since last report Japanese government has confirmed 1981 domestic catch at 11,336 million MT, exceeding 1980 catch, which was also record, by 214,000 MT. Following are details of catch, expressed in thousands MT (1980 in brackets): marine fishery 10,156 (9,909); marine culture 955 (992); freshwater fishery 124 (128); freshwater culture 92 (94). Major species showing increases were sardine 3,092 (2,198); Alaska pollock 1,592 (1,552) and salmon 150 (123).

Significant reductions recorded from common mackerel 936 (1,301); tuna 362 (378); saury 160 (187); crab 73 (78); and common squid 193 (331).

3. Results - four months/1982. Ministry of Agriculture, Forestry and Fishery survey indicates domestic landings totalled 3.13 million MT during period January/April, and increase of 2.3 percent prices have been firm at an average of Yen 152 as opposed to Yen 147 during same period 1981. Imports during same period declined 2.4 percent to 345.3 thousand MT, mostly as a result of reduced purchases fish meal. Total value of imports rose 15.9 percent, from Yen 226,536 million in 1981 to Yen 262,535 million currently and average value/kg rose from Yen 640 to Yen 760. However much of increase is traceable to weakening Yen against USA dollar with exchange rates this year ranging from Yen 218 to 246 dollar compared to range in 1981 of Yen 196 to 216. Comparative results by major categories are as follows:

(Volume-thousand MT value 1,000 million Yen)

	Jan.-Apr. 1982		Jan.-Apr. 1981	
	<u>Volume</u>	<u>Value</u>	<u>Volume</u>	<u>Value</u>
Live	4.1	8.6	7.3	9.6
Fresh/frozen	274.3	211.6	242.2	176.3
Salted/dried and Smoked	8.9	12.1	6.5	6.9
Prepared/preserved	13.6	15.6	11.7	11.7
Others	44.4	14.7	86.0	22.0
Total	345.3	262.5	353.7	226.5

4. Salmon: Domestic catch taken during spring season under USSR-Japan agreement is expected to equal quota of 42,500 MT but proportion of sockeye, premium species, is approximately half of 1981 ratio. Harvests of coastal chum salmon (set-net fisheries) and Sea of Japan pink salmon (long line troll) are reported as fair. As inventory carried over from last year is now exhausted, supplies of salmon are tight. As a result, prices have risen (especially for sockeye) and now average approximately 60 percent higher than last year. Although good catch is anticipated in Alaska, negotiations may result in higher prices than in 1981. One business paper recently reported that price of trolled Canadian sockeye reached USA dollars 2 per lb. FOB, and Alaska sockeye 1.80-1.90- lb. FOB. Total supply in 1982 estimated at 270-280,000 MT, incl domestic catch of 170-180,00 MT and imports of 100,000 MT current prices/kg. for imported frozen sockeye on Tokyo market are: semi-dressed, size 4-6 Yen 1,450-1,500; size 6-9 1,500-1,550; and full dressed, size 4-6 Yen 1,500.

5. Salmon roe: Carryover of 1,300 MT imported roe from 1981 was sold prior to arrival new roe from Alaska/Canada. First sales of Alaska sockeye roe at Tokyo market in early June 1982 started Yen 7,500/kg. for grade one, but price has now declined to Yen 6,500/kg. on other hand 1981-produced pink roe is selling at Yen 2,700-3000/kg. Trade estimates total supply in 1982 will be 11,000-13,000 MT reflecting good catch anticipated in Alaska. Good supplies are encouraging trade to extend market to Kansai and Khyshu areas.

6. Herring roe: Trade estimates total herring roe supply in 1982 will be less than 10,000 MT (8,500 MT matures, and 1,500 MT immatured roe). Expected sources and quantities are: Canada 4,000 MT; USA 3,000 MT (of which 1,800 by roe, 1,100 MT extracted from 13,000-14,000 MT of imported roe herring; 2,000 MT from South Korea (also from imported roe herring; 500 MT from USSR; 250 MT PRC. Due to delayed herring fishery in Bristol Bay, some processors purchased Canadian roe at CDN dollars 9.70-10.00/lb. FOB and are now encountering problems in selling high cost inventory. This is period of lowest demand and no sales of herring roe reported at Tokyo market.

7. Herring roe on kelp: Canadian price has suddenly increased to USA dollars 12-13/lb. FOB and many traditional buyers have stopped importing. At above price, importers would have to sell at price of Yen 7,000/kg. There are no sales at present and none expected until newly produced products arrive.

8. Food herring: Government has increased import quota of herring to 54,000 MT per year, and first half quota has been set at 27,000 MT. Japanese imports of herring in 1981 exceeded 50,000 MT, and trade believes that market will take full quota providing prices are reasonable. However, industry disappointed at reported poor catch of Canadian Atlantic herring, and over-the-side sales of more than 30,000 MT to USSR and Eastern European countries. On other hand, domestic catch of spring herring around Hokkaido is very good. Landing at 66 major fishing ports during Jan.-Apr. 1982 totalled 11,800 MT, a quantity which exceeds total 1981 catch of 11,000 MT. These are young herring which are too small for fresh trade and all are being processed. They also have no roe.

9. Squid: Poor domestic catches which were experienced in 1981 continued in early months of 1982 and delayed start of spring squid fishery in Sea of Japan by approximately one month. Maff survey shows landings of common squid at 66 ports in first four months totalled 22,000 MT. On this basis, total landings are estimated at 44,000 MT compared to 39,440 in 1981. Current catch includes substantially higher proportion of frozen product as main fishing area (in middle of Japan sea) is too distant for small jiggers. Late reports indicate that catch improved noticeably about June 20 but no details available. Japanese catch of New Zealand was good with more than 30,000 MT taken by jiggers and 13,000 MT by trawlers (including 9,900 MT quota on government to government basis). In Argentina, Illex catch is also reported as good and 25,000-30,000 MT is expected by end of season in July. Inventories, which had been excessive, are now virtually nil with only nominal quantities of New Zealand and spring common squid available.

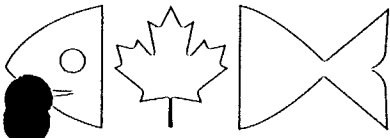
10. Imports of squid in first four months totalled 24,574 MT, slightly above 22,717 MT a year earlier (when inventories were high). Figures include approximately 15,000 MT and 11,000 MT respectively of cuttlefish from Korea and other countries. Low volume of imports, which contrast with 46,380 MT in 1980, reflects lack of supplies worldwide. Despite strenuous efforts by importers to secure additional quantities, approximately 5,000 MT remains unfilled on second half/81 quota of 25,000 MT. Prices are currently substantially higher than last year, averaging gains of 50-60 percent in first four months and about 40 percent in late June. Average domestic prices for common squid at landing ports were: Yen 556 for fresh (Yen 351 in 1981) and Yen 407 for frozen (Yen 195) in April. New Zealand jigged squid sold at Yen 3,500/case of 8.5 kg with 26-30 squid/case. This is 80-90 percent above 1981 price. Current price frozen common squid at Tokyo market is Yen 4,600-4,700/case of 7.5 kgs.

containing 26-30 squid. As a result of high prices, snack processors in Hakodate, which require approximately 300,000 MT/annum have switched from fresh/frozen squid to daruma (semi-dried) of red squid or dried Canadian Illex.

11. Outlook: Scientists forecast that catch of common squid in sea of Japan will exceed last year volume of 140,000 MT. However, officials emphasize that it is too early to predict with any degree of confidence. Re imports, trade expects up to 5,000 MT of New Zealand squid from joint venture with USSR and similar quantity Argentine Illex caught outside Argentine zone by USSR and East European countries. Importers also looking to Canada for substantial volumes this year.

12. Black cod: Price of black cod has increased as a result of USA restrictions in Alaska waters. Japanese-caught black cod (dressed and frozen on board) selling at Tokyo market Yen 900/kg size 406 per case of 12 kgs.; Yen 850-860 size 7-8; Yen 650-670 size 9-10; and Yen 500-530 size 11-15. Demand for Canadian and USA black cod expected to be strong throughout 1982.

13. Capelin: Imports of capelin in 1982 on contract basis are approximately 20,000 MT to date, comprising 16,000 MT from Norway, 1,000 MT from Iceland, 2,700-3,000 MT from USSR. All contracts are for 100 percent females with roe; however, USSR sells unsorted herring and volume is approximately twice indicated level. FOB contract price is USA dollars 1,375/MT for both Norwegian and Icelandic product, an increase of dollars 100 over 1981. Trade expects approximately 10,000 MT (same as 1981) from Canada.



FISHERY MARKET DEVELOPMENTS COMMERCIALISATION DES PRODUITS DE LA PÊCHE

FMD NO. 8

MARCH 1982

FISHERIES MISSION TO ISRAEL

You will find attached a report covering a recent fisheries mission to Israel.

If you need additional information, please contact Louis Gaetan, Fishery Products Division at (613) 995-8107 or Vince Gobuyan, Marketing Directorate at (613) 995-2177.

Aussi disponible en français.

REPORT

PEMD Fisheries Mission to Israel

February 5-12, 1982

During the first part of February, Fisheries Missions sponsored by the PEMD FOOD Program of the Department of Industry, Trade and Commerce, visited four Middle East countries: Egypt, Israel, Saudi Arabia and Kuwait. Their objectives were to gain a better knowledge of those markets, to sell inventories of frozen fish held by the processing industry on Canada's East coast, and to pave the way for increased sales of Canadian fishery products to the Middle East.

The members of the Missions, drawn from both industry and government, were as follows:

Saudi Arabia and Kuwait

Randall McGregor - National Sea Products Limited
Louis Gaëtan - Fishery Product Division, Industry, Trade and
Commerce
Fernand Renault - International Directorate, Fisheries and
Oceans

Egypt

Ron Bulmer - Canadian Association of Fish Exporters
André Arsenault - Quebec United Fishermen
Ernest Bishop - Fishery Products Ltd.

Israel

Stanton Guy - H.B. Nickerson & Sons Ltd.
Vince Gobuyan - Marketing Directorate, Fisheries and Oceans

This report covers the mission to Israel. The countries visited by the other two missions are dealt with in separate reports.

All three missions were given considerable assistance by the Trade Commissioner Service of I.T. & C. Among the services provided to the members of the Mission were provision of background briefings, setting up of appointments with importers, interpreter assistance etc.

Egypt represents a substantial market with rapid growth potential for lower cost species and Canadian firms could substantially increase their sale of product such as whole mackerel and herring, redfish, H&G fillets and hake fillets. The high costs of transportation are however a serious impediment.

PEMD FISHERIES MISSION TO ISRAEL

A - INTRODUCTION

The total population of Israel (not including administered territories) is approximately 3.7 million of which 85% is Jewish and the rest Arab and Druse. About half of the Jewish population is made up of new immigrants who came in since 1948. 57% of the population is under the age of 30. 86% of the people live in urban areas. The principal cities are Jerusalem, the capital, population 366,300, greater Tel Aviv, population 1,017,400; and Haifa, population 228,000.

Despite government efforts to encourage industrial development to produce export and substitutes for imports, shortage of natural resources and increasing defence imports have continued to cause negative trade balances ranging from \$1.8 to \$2.2 million since 1975. No significant change is foreseen in the near term.

Trade with Canada appears to be increasing in our favour. In 1980, imports of Canadian products amounted to \$80.4 million while Israeli exports to Canada added up to \$45.7 million.

B - DEMAND FOR FISH

The total demand for fish in 1980 was 35,773 metric tons or 9.6 kg. per capita consumption. Per capita consumption dropped from the previous year's level of 10.5 kg. apparently due to insufficient supply. Another reason for the drop in consumption appears to be the lack of new products to satisfy the growing sophistication in consumer taste for fish products.

The popular species consumed are common and silver carp from fish pond culture, St. Peter's fish, grey mullet and silver carp from the Sea of Galilee. Sardinella caught along the Mediterranean coast of Israel are increasingly sold by the fresh market as opposed to canning as the latter can not afford to pay the higher prices needed by fishermen.

There appears to be a growing demand for imported fish particularly groundfish (hake) fillets. Frozen whole Atlantic mackerel has also become a major fresh import. Most of the mackerel is processed into various smoked products (whole, head and tail off, single and butterfly fillets). Demand for herring products (smoked and pickled), have remained steady over the past 3 years.

C - SUPPLY OF FISH

Domestic Production

In 1980, 60% of the fish supply came from domestic sources. Of the 23,070 metric tons domestic production half was from fish culture. The second largest domestic source (23.4%) was the Atlantic deep sea trawler production. The balance of domestic fish source were caught from Lake Kinneret (Sea of Galilee), the Mediterranean (pelagic and trawls) and very nominal catches from the Red Sea. Over the past several years domestic production has been flat.

Imports

A total of 15,661 tons of various fish products were imported. The largest (54.4%) imported item was frozen or chilled whole fish, followed by frozen fillets (29.7%). The balance (15.9%) of imported products were in the form of salted or cured fish (Table 1). Aggregate value amounted to U.S.\$21.6 million. Increasing quantities of frozen whole fish are being imported, while frozen fillets and processed products seem to be on the decline.

The import statistics taken from the Israel Control Bureau of Statistics vary significantly from the data given by the Ministry of Agriculture's Department of Fisheries. The former show incomplete reporting of quantities which also leaves some doubt as to the completeness of the values. However, Table 2 was included to show imports of Canadian fish in relation to major competitors and the total fish imports by product group. Consultations with industry people indicated that the Department of Fisheries data are reasonably accurate.

On the other hand industry sources revealed that fish imports in 1981 were between 15 to 16 thousand metric tons. One third of the imports were frozen whole fish for processing into smoked or canned products (herring, mackerel, red fish and sardines), a third were frozen fillets from South America (hake) and Europe (American plaice and ocean perch) and a third were processed or cured fish from Europe (salted herring, canned sardines and mackerel). There appears to be an upward trend towards importation of fish for processing and a rather flat growth for processed or cured products.

Exports

A small quantity (2,456 tons) of fish products was exported in 1980. Fresh fish and canned fish products make up almost all of the exported quantities (Table 3).

D - IMPORT AND DISTRIBUTION CONSIDERATIONS

1. It is highly recommended to do business through an importer or commissioned agent on an exclusive basis.
2. Importers normally sell through distributors who in turn sell to wholesalers and retailers.
3. The accepted practice is to quote prices to importers in U.S. dollars.
4. Standard method of payment is by letter of credit or cash against documents.
5. Commercial advertising is not widely used.
6. Documentations are accepted in English, French or Hebrew. One original and two copies of commercial invoices are required. Invoices should include country of origin, place and date of invoice, name and address of seller and buyer, description of goods, quantity, marks and numbers of packages, weight of each package, total weight, price of goods, shipping and payment. Food including fish generally require working in Hebrew stating the name of the product, country of production, name and address of producer, and importer and product specifications.
7. Exchange rate - The official Israeli currency mint is in shekel divided into 100 agorn. The rate of exchange relative to foreign currencies floats freely depending on supply and demand. In February 1982, the Canadian dollar fetched between 13.5 to 14 shekels.

E - KEY POINTS

1. Fish is a major item in the diet of the Jewish population.
2. Beef prices increased by 19% on February 9th which could spur fish consumption.
3. The Israeli market is very price conscious, as the economy is highly inflationary and incomes can hardly cope with the escalation of prices.
4. The most popular fish appears to be smoked mackerel (head and tail off, B/F fillets and single fillets). Large fish (600 gm and up) with high fat (18% up) is preferred and price indications are as follows:

Head and tail off smoked - 1 48 (C\$3.70)/kilo
B/F fillets smoked - 1 70 (C\$5.40)/kilo

5. Herring used to be the largest single item but seems to be on the decline. Estimated demand is between 15 000 and 20 000 of 50 kg barrels of salted herring from Europe, mostly Denmark.

Price is around 15 13 (C\$1.00)/kg.
6. Frozen round, butterfly and single fillet herring are imported in substantial quantities for smoking purposes. Large 3-5/kg high fat 16% to 20% fish is preferred.
7. Red fish (sebastes marinus) in H & G straight cut form is imported from Norway and Iceland. Price indication is around US\$1 300 to \$1 500/MT CIF. Total market is about 50 x 40 ft. containers per year.
8. Hake fillets are brought in from Argentina and Uruguay in increasing quantities at US\$1 350 CIF.
9. About 15 containers of Orange Roughy was imported from New Zealand at a price of US\$1 300/MT CIF. This fish is similar to ocean perch.
10. Cyprus, which is under jurisdiction of Tel Aviv Embassy, inquired about skinned squid tubes supply, as their supply has dried out.
11. In the fish trade, Canada has increased its share of Israeli fish imports from 3.5% in 1978 to 5% in 1980.
12. There appears to be a directional trend to import more frozen fish for processing in Israel in line with the government's emphasis to reduce imports of finished products.
13. Companies should explore the possibility of reducing freight rates by back haul shipments of Israeli export products to Canada.

F - CONCLUSIONS

1. Egypt represents a substantial market with rapid growth potential for lower cost fish.

2. Israel is already an established market for certain species such as herring and mackerel with red fish and hake emerging as significant species.
3. Transportation cost is the dominant sales deterrent for Canadian fish. Companies interested in selling to Israel should try to develop an arrangement with an Israeli company shipping products to Canada or the U.S.
4. Canadian product specifications do not exactly meet the market requirements. There appears to be opportunities to reduce product cost by simply packing to market specifications.
5. There is a real potential to substantially increase importation of Canadian fish products specifically, whole mackerel and herring, redfish, H&G fillets, and low price groundfish (flat fish and hake) fillets.

Table 1

FISH IMPORTS

(Q in metric tons, V in thousand US dollars)

	<u>1978</u>		<u>1979</u>		<u>1980</u>	
	<u>Q</u>	<u>V</u>	<u>Q</u>	<u>V</u>	<u>Q</u>	<u>V</u>
Frozen fillets	4 076	3,656	6 510	6,508	4 501	7,229
Frozen, chilled, whole	7 323	6,100	6 942	6,193	8 255	9,144
Salted	1 045	1,787	1 343	4,939	1 005	1,377
Processed/ cured	<u>1 745</u>	<u>216</u>	<u>2 508</u>	<u>3,922</u>	<u>1 400</u>	<u>3,870</u>
Total	14 189	11,759	17 303	21,744	15 161	21,620

Source: Ministry of Agriculture - Department of Fisheries,
State of Israel.

Table 2

FISH IMPORTS

(Q in metric tons, V in thousand US dollars)

	<u>1978</u>		<u>1979</u>		<u>1980</u>	
	<u>Q</u>	<u>V</u>	<u>Q</u>	<u>V</u>	<u>Q</u>	<u>V</u>
<u>Fillet fish, chilled/ frozen Total:</u>	3 210	4,908	6 681	6,508	4 163	7,058
Canada	54	82	80	120	221	331
Uruguay	22	23	256	101	688	666
Argentina	2 507	3,309	5 259	4,135	2 468	3,779
Others	627	1,494	1 086	1,972	786	2,262
<u>Salmon, chilled/frozen Total:</u>	71	187	141	342	120	268
Canada	26	128	19	131	10	63
Argentina	44	54	25	36	91	172
Others	1	5	97	175	19	33
<u>Herring in brine Total:</u>	1 234	1,787	1 202	1,727	NA	1,377
Canada	38	27	NA	160	NA	101
Europe (mostly Holland)	1 196	1,760	NA	1,567	NA	1,276
<u>Fish, whole chilled/ frozen Total:</u>	5 444	4,254	6 949	6,211	8,623	8,875
Canada	131	175	170	206	388	309
Fed. R. Germany	502	530	1 607	1,688	2 591	3,074
Norway	1 036	586	905	633	1 367	1,147
Uruguay	271	329	191	208	431	707
Argentina	125	104	324	386	453	578
Others	3 379	3,028	3 752	3,090	3 393	3,060

NA = data not available

Source: Foreign Trade Statistics, Israel Control Bureau of
Statistics. Vol. XI and XII.

Table 3

FISH EXPORTS

(Q in metric tons, V in thousand US dollars)

<u>Products</u>	<u>1978</u>		<u>1979</u>		<u>1980</u>	
	<u>Q</u>	<u>V</u>	<u>Q</u>	<u>V</u>	<u>Q</u>	<u>V</u>
Frozen shrimp	241	531	14	144	8	13
Fresh fish	658	2,094	2 044	2,393	1 218	1,034
Canned fish	95	257	200	516	1 230	495
Total	994	2,882	2 258	3,053	2 456	1,542

Source: Ministry of Agriculture - Department of Fisheries, State of Israel.

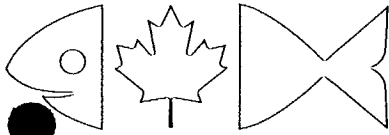
Table 4

SUMMARY OF FISH SUPPLY AND CONSUMPTION

(in metric tons)

	<u>1978</u>	<u>% of Total</u>	<u>1979</u>	<u>% of Total</u>	<u>1980</u>	<u>% of Total</u>
Domestic production	23 752	(65.2)	24 150	(58.3)	23 070	(60.3)
Imports	12 670	(34.8)	17 301	(41.7)	15 159	(39.7)
	<u>36 422</u>	<u>(100.0)</u>	<u>41 451</u>	<u>(100.0)</u>	<u>38 229</u>	<u>(100.0)</u>
Exports	994	(2.7)	2 258	(5.4)	2 456	(6.4)
Net Supply	<u>35 428</u>	<u>(97.3)</u>	<u>39 199</u>	<u>(94.6)</u>	<u>35 773</u>	<u>(93.6)</u>
Per capita consumption (Kg)	10		10.5		9.6	

Sources: Israel Fisheries 1978, 1979 and 1980 Reports - Ministry of Agriculture - Department of Fisheries of State of Israel.



**FISHERY MARKET
DEVELOPMENTS**

**COMMERCIALISATION DES
PRODUITS DE LA PÊCHE**

FMD NO. 7

March 1982

Situation Report on Japanese Market
-----for Fish Products-----

You will find enclosed a report giving a short overview of the 1981 Japanese domestic production and trade in fishery products. It covers the main species of Canadian fish sold in Japan.

The report was prepared by the Commercial Division of Industry, Trade and Commerce in Tokyo and reproduced here as per the original telex of March 11, 1983.

Aussi disponible en français.

Situation Report - Fish Products

Summary - 1981 Fishery. Based on MAFF survey which shows two percent increase in domestic landings over preceding year, total Japanese landings in 1981 are calculated at record 11.3 million M/T. Average landing value/kg. was unchanged at yen 160 (approximately 86 cents/lb.) Sardine (Pacific Pilchard) landings, which registered 58 percent year-to-year increase to approximately 3.0 million M/T, account for major portion of increase. As primary use of sardines is production of fish meal, domestic supplies of food grade fish did not increase significantly and, consequently, imports of better quality food species were also strong. Imports in 1981 rose nine percent to 1.1 million tons, second highest level on record. Total CIF value of imports rose 15 percent to yen 880,000 million (approximate Canadian dollars 4,750 million) and value/kg. increased six percent to yen 779 (dollars 4.20/kg.). Details of above, plus discussion of fourth quarter activities and comments on individual species of interest to CDA, follow.

2. MAFF survey indicates that domestic 1981 landings rose two percent above 1980. This increase means Japanese landings in 1981 totalled 11.3 million M/T and exceeded record of 11.1 million M/T set in 1980. Although average landing price/kg. in first nine months was slightly below same period 1980 (yen 159 vs. 167), prices strengtnened in fourth quarter to yen 161 (yen 142 in 1980) and average landing price for entire year was unchanged at yen 160. Demand for most species was good and inventory accumulation was less than in previous year.

3. Imports of fish and marine products in 1981 totalled 1,129 thousand M/T, an increase of 8.8 percent from 1,037 thousand M/T in 1980. Total CIF value also increased to yen 879,881 million from yen 764,272.5 million, and average value/kg. rose 5.8 percent from yen 737 in 1980 to yen 779 in 1981. Imports by major categories in 1980 and 1981 as follows (volume-thousand M/T; value-1000 million yen):

	1981		1980	
	<u>Volume</u>	<u>Value</u>	<u>Volume</u>	<u>Value</u>
Live	220	32.0	20.6	32.0
Fresh/frozen	876.6	680.7	735.0	575.2
Salted/dried & smoked	39.6	80.4	33.1	60.0
Prepared/preserved	43.3	41.0	40.7	41.8
Other	<u>147.6</u>	<u>45.9</u>	<u>208.0</u>	<u>55.3</u>
Total	1,129.1	880.0	1,037.4	764.3

Based on exchange rate of 185 yen to the dollar, total value of 1981 imports was equivalent to dollars 4,756 million, of which fresh/frozen fish represented dollars 3,679 million (77 percent).

4. Salmon: record domestic catch of autumn chum salmon anticipated in last report is now confirmed; quantity is at least 100,000 M/T indicated previously and may reach 110,000 M/T (75,000 in Hokkaido and 35,000 in northern mainland). Imports of fresh/frozen salmon in 1981 also established new record at 71,836 M/T (60,250 from U.S.A., 5,158 Canada, 3,002 North Korea, 2,546 U.S.S.R.). Based on above, total 1981 salmon supply was approximately 250,000 M/T which includes above plus catch of pink salmon in Sea of Japan and 42,500 M/T taken under Soviet/Japan Pacific salmon fisheries in spring months. Large catch and resultant lower prices led to very active sales in all product categories (i.e. fresh/frozen, salted, smoked and pickled/processed) with exception of (higher priced) imports (see report of November 27, 1981). However prices of domestic salmon have recently strengthened and sales of imported salmon have risen. Inventories of imported salmon, estimated at 30,000 M/T include 20,000 M/T of sockeye at year-end, are currently reported to be very low and trade expects all stock will be sold prior to commencement of spring season. Current prices/kg. of imported frozen (Alaskan) sockeye on Tokyo market are: semi-dressed (head-on), size 4-6 is yen 1,350-1,400; size 6-9 yen 1,450-1,600; and full dressed 4-6 at yen 1,400-1,450. As large harvests are forecast in North America as well as Japan in 1982, trade is expecting severe downward pressure on prices.

5. Salmon roe: 1981 imports also registered record 10,732 M/T (9,506 from U.S.A., 1,190 from Canada). Combination of large supply and reduced prices led to active sales and diversion of substantial volume to Ikura production. As a result, virtually all domestic product has now been sold. Sale of imported roe remained slow in last quarter/81 and estimated inventory at year-end was approximately 1,300 M/T. However trade expects all stock could be sold prior to arrival of 1982 product from Alaska/Canada. Current Tokyo wholesale market price for grade one Alaska/Canadian chum roe is yen 3,800-4,000/kg., down from yen 4,000-4,300 in late November, 4,300-4,500 in mid-September, and yen 4,700-5,000 in mid-April/81. As in case of salmon, large catches forecast for Alaska/Canada and Japan in 1982 has made trade cautious and difficult negotiations are foreseen on prices of imports.

6. Herring roe: 1981 imports of salted herring roe registered 7,645 M/T including 4,185 from Canada,

1,768 U.S.A., 2,007 South Korea, 469 PRC, and 180 U.S.S.R. Total 1981 supply is calculated at almost 13,000 M/T comprising 3,000 M/T carry-over from 1980, 1,800 M/T extracted from Alaska roe herring, imports of 7,645 M/T salted roe plus 466 M/T frozen roe (438 M/T from Canada - mostly Atlantic herring) for manufacturing purposes. Despite lower prices, sales at wholesale markets in large cities were slow until mid-November/81, but trade was reporting significant sales through invisible (i.e. not tabulated) distribution channels outside these city markets. Market sales became active in late-November and almost all fully processed roe was sold. Only inventory reported at year end was 5-6,000 M/T Alaska roe herring (from which 5-600 M/T roe could be processed). Prices strengthened throughout December and have remained firm on very small sales. Market prices (yen per kg. for large size) were as follows: 4,800-5,600 in first week of December; 5,000-5,800 in second week; 5,400-6,300 in third week; and 5,800-6,800 in fourth week. Current Tokyo wholesale market price is yen 5,800-6,000/kg. Trade is convinced that good year-end results are attributable to promotional campaign and reduced prices (approximately yen 1,000/kg. less than 1980). Trade also convinced sales could collapse again if prices increase and therefore expect difficult price negotiations for roe from San Francisco Bay, Canada and Alaska in 1982.

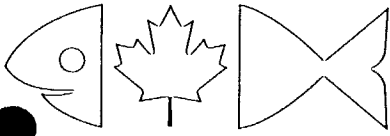
7. Herring roe on kelp: 1981 imports of 385 M/T (175 M/T from Canada and 212 from U.S.A.) represent substantial reduction from 544 M/T (240 Canada, 304 U.S.A.) imported in 1980. Decrease is mainly attributed to low grade Alaskan product which proved difficult to sell in consumer markets. Sales of first quality Candian product was also slow throughout most of year but became active at year-end. Price at outside Tokyo market and to institutional trade rose to yen 5,800-6,000/kg. from yen 5,300-5,700 as demand increased.

8. Food herring. Poor domestic catches of herring as well as Saury and mackerel during early part of 1981 was reflected in record level of imports totalling 50,118 M/T. Principal supplying countries were Canada (23,452 M/T), U.S.A. (22,342 of which 18,000 was Alaskan roe herring), and the Netherlands (2,914). As a result of reduced international prices, sales were active throughout year. In late November, domestic catch improved and total of 40,000 M/T taken off Northern Hokkaido and Pacific. This supply, which coincided with arrival of winter herring from Canadian West Coast, has led to oversupply. However, demand remains good. Canadian Atlantic herring currently selling at yen 260-340/kg. on Tokyo market. This is decline from yen 300-400 in November/December. No sales data available for Pacific herring which is only being sold to processors because of small size.

9. Squid: poor catches reported for all species of squid in 1981. Common squid season closed with catch of approximately 175,000 M/T, a decrease of 125,000 M/T from 1980. Of this amount 140,000 M/T were taken in Sea of Japan (180,000 M/T in 1980) and 35,000 M/T in Pacific (95,000). Catch of red squid in Pacific also decreased to 125,000 M/T landed weight (40 percent in tube form) from 170,000 M/T in 1980. As a result of reduced domestic supply, Japanese government announced 25,000 M/T import quota for second half FY81. However imports have remained low due to poor catches in foreign countries. Fresh/frozen common squid prices at all fishing ports increased sharply throughout latter half of 1981, and as a result, slow sales were reported. Current frozen squid price at Tokyo market yen 4,300-4,400 per case of 7.5 kgs. containing 26-30 squid per case (yen 573-587/kg.). This is slight decrease from mid-November price (yen 626-640/kg.), but still represents rise of more than 75 percent since prices bottomed in July. Japanese squid catch in New Zealand waters reported very good. Product began arriving on market in late February with first quality product selling at yen 3,520-3,530/case of 8.5 kg. (26-30/case). This is increase of more than yen 1,000/case over last year.

10. Black cod: Japanese-caught Alaska black cod (frozen on board) selling steadily at yen 500-800/kg. Steady demand also reported for black cod imported from Canada, most of which is also frozen on board and is considered equivalent to Quality of Japanese caught products. Volume Canadian sale is not available.

11. Capelin: imports, mainly females with roe, totalled 25,937 M/T in 1981. Supplying countries (M/T) were Norway (13,946), Canada (10,850), U.S.S.R. (823-unsorted), and Iceland (311). Shipments from Norway and Canada were reported to have a larger proportion of larger size fish (i.e. 40-45 kg. which are less popular with consumers). As result, year end inventories totalling 7,000-8,000 M/T contained relatively high proportion larger sizes. Negotiations with Norway and Iceland on prices of 1982 catch have apparently been concluded. Although exact price is not yet known, trade reports indicate it has been set at U.S.A. dollars 1,340-1,350 M/T F.O.B., an increase of 5-6 percent over 1981 price of dollars 1,275/M/T.

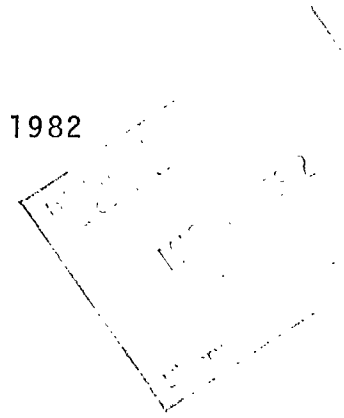


**FISHERY MARKET
DEVELOPMENTS**

**COMMERCIALISATION DES
PRODUITS DE LA PÊCHE**

FMD NO. 6

MARCH 1982



FISHERIES MISSION TO SAUDI ARABIA
AND KUWAIT

You will find attached a report covering a recent fisheries mission to Saudi Arabia and Kuwait.

If you need additional information on the companies visited, please contact Louis Gaetan, Fishery Products Division at (613) 995-8107.

Aussi disponible en Français.

REPORT

PEMD Fisheries Mission to Saudi Arabia and Kuwait

February 5-12, 1982

During the first part of February, Fisheries Missions sponsored by the PEMD FOOD Program of the Department of Industry, Trade and Commerce, visited four Middle East countries: Egypt, Israel, Saudi Arabia and Kuwait. Their objectives were to gain a better knowledge of those markets, to sell inventories of frozen fish held by the processing industry on Canada's East coast, and to pave the way for increased sales of Canadian fishery products to the Middle East.

The members of the Missions, drawn from both industry and government, were as follows:

Saudi Arabia and Kuwait

Randall McGregor - National Sea Products Limited
Louis Gaëtan - Fishery Product Division, Industry, Trade and
Commerce
Fernand Renault - International Directorate, Fisheries and
Oceans

Egypt

Ron Bulmer - Canadian Association of Fish Exporters
André Arsenault - Quebec United Fishermen
Ernest Bishop - Fishery Products Ltd.

Israel

Stanton Guy - H.B. Nickerson & Sons Ltd.
Vince Gobuyan - Marketing Directorate, Fisheries and Oceans

This report covers the mission to Saudi Arabia and Kuwait. The countries visited by the other two missions are dealt with in separate reports.

All three missions were given considerable assistance by the Trade Commissioner Service of I.T. & C. Among the services provided to the members of the Mission were provision of background briefings, setting up of appointments with importers, interpreter assistance etc.

Increased trade opportunities were identified in both Saudi Arabia and Kuwait and orders for approximately US \$400,000 of Canadian fishery products were taken. Competition from countries such as Uruguay, New Zealand and Argentina and high transportation costs are nevertheless serious impediments to an expanded volume of sales in the Middle East.

SAUDI ARABIA

Overview of the Saudi Fisheries Market

With an estimated population of some nine million (not including close to two million foreign workers) and a limited domestic catch, Saudi Arabia is heavily dependent on foreign imports to meet the fish component of its food requirements. Saudi food imports now account for approximately 85 per cent of the country's needs and are believed to have reached more than Can \$6 billion annually.

Per capita fish consumption in Saudi Arabia has been rising gradually and it expected to reach 5 kg by 1985. By that time, some 44 000 MT of fresh and frozen fish are expected to be required annually.

Since 1972, Saudi fish imports have increased substantially, in spite of efforts to boost local production from 16 000 MT to 25 000 MT by 1985. Imports are now estimated to total approximately 28 000 MT, including fish for fishmeal.

A large part of Saudi fish imports is in the form of canned products. The latter include salmon and tuna from the USA, mackerel from Japan, herring from Western Germany and the United Kingdom, sardines from Brazil and a variety of inexpensive products from Korea, Malaysia, Thailand and India. Canned fish products now account for 13 000 to 14 000 MT per annum and are expected to grow marginally to 1985.

Imports of chilled or frozen fish products are now estimated to have reached upwards of 15 000 MT annually. These products come mainly from Argentina, Uruguay, India, New Zealand and the United Kingdom. Smaller quantities are brought in from the USA, Jordan, Kuwait, Denmark, the United Arab Emirates and France.

Although the Saudis have a marked preference for whole fish of species similar to those which are indigenous to the kingdom, frozen, prepared and pre-packaged products of other species are gaining in popularity and sales are expected to continue climbing. These "specialty" products have so far come mainly from the United Kingdom, Denmark and the USA.

In 1979, Canada exported some \$41,000 worth of fishery products to Saudi Arabia. These exports included frozen salmon and other species, as well as smoked salmon. In 1980, Canadian fish exports to Saudi Arabia totalled \$9,000 and in 1981, they reached \$14,000.

Fresh fish are generally sold whole and ungutted. Frozen fish is only starting to be accepted by the local population and the bulk of imported frozen fish is consumed by the expatriate population, the greater part of which is employed in labour camps.

In Saudi Arabia, fish is mainly sold at local fish markets, but increasing quantities are purchased in North American style supermarkets (Appendix A). The latter now account for approximately 15 per cent of total food sales in the kingdom.

Market Characteristics

Although there was genuine interest in Canadian fishery products (photographs of each product with accurate descriptions in Arabic were often requested), there was no doubt that price was a prime consideration. This was particularly true in the case of large catering firms which feed daily thousands of workers throughout the kingdom. A leading catering organization told members of the Mission that daily, per capita food costs in labour camps they served had to be kept within the following limits:

Americans: between 25 and 35 SR (Can. \$8.77 and \$12.28)
British and Europeans: between 18 and 25 SR (Can. \$6.32 and \$8.77)
Clerical personnel: between 10 and 16 SR (Can. \$3.51 and \$5.61)
Workers from the Philippines and Thailand: between 8 and 12 SR (Can. \$2.81 and \$4.21)
Workers from Pakistan, Bangladesh and Sri Lanka: 8 SR (Can. \$2.81)

Conversion rate: Can. \$1 : 2.85 SR

When one considers the high cost of food in Saudi Arabia, the above limits appear very low. It becomes obvious that catering firms are primarily looking for low-priced imports of food -- including fish.

Another importer of fishery products stated that the Saudi Ministry of Health was now putting pressure on hospitals to serve fresh rather than frozen fish. It was believed that other Ministries might follow suit. With regard to frozen fish, hospitals currently require that it be no more than three to six months old and that the production date be indicated.

Import duties do not constitute a significant barrier to exports of food products to Saudi Arabia. About half the

country's food imports come in duty free and, with a few exceptions the remainder are subject to a three per cent duty. Fishery products from Canada should, in most instances, enter Saudi Arabia duty-free.

Correct packaging for the Saudi Market is a matter of great importance. Cans, boxes, etc... containing food products must have a label which gives, in Arabic, mandatory information such as the name of the food, ingredient listing, net weight, country of origin and production and expiry dates. (usually 6 months after production). For further information in this connection, the reader should consult Worldwide Fisheries Marketing Study - Saudi Arabia.

Exporters of foodstuffs to Saudi Arabia should also note that under Saudi regulations which came into effect on January 1, 1982, "stick-on" labels in Arabic for canned fish are generally no longer acceptable. A proper label with all the necessary information in Arabic is now required.

Another point to be kept in mind by exporters is to quote prices in U.S. rather than Canadian funds as the prevailing exchange rate for the Canadian dollar in Saudi Arabia is about 33% lower than for the U.S. dollar. It must also be stressed that the successful promotion of Canadian fishery products in Saudi Arabia requires frequent visits on the part of exporters as well as informative illustrated material (in Arabic if possible) on their range of products.

Although Saudi importers have a market preference for species such as white croaker, mullet, Trevally and red snapper, the following Canadian fishery products have good market possibilities in the kingdom: mullet, whitefish, sole, round mackerel (one to three count per kilo), cod, squid, (tubes, tails and tentacles) and canned products (sardines, salmon, crab, shrimp.)

Calls on the Trade

During their stay in Saudi Arabia, members of the Mission called on various firms involved in the purchase of fishery products in Jeddah, Riyadh and Damman. Most of these firms had had practically no exposure to fish exports from Canada, they included several large catering firms providing food services to the country's numerous labour camps and to public institutions such as hospitals.

Following is a short review of the firms visited. Interested Canadian companies should contact these firms directly with

copy to the Commercial Division of the Canadian Embassy, to the attention of Michael Ellis, telex 401060 DOMCAN SJ.

Name of Company: POON (Saudi) Ltd.
Attention Mr. Simon Ford
P.O. Box 5809
Jeddah, Saudi Arabia
Telex: 401759 TURKI SJ

Company Description

Poon (Saudi) Ltd. is a major catering group in Saudi Arabia that deals with Kuwait, Iraq and Saudi Arabia. The company services a large number of labour camps, compounds and individual stores. It does not import directly, however, but buys its products by way of tenders which are called twice a year. Poon issues a catalogue with the specifications of the fish it requires. First and second suppliers are then chosen to supply the company for the next six months. Poon does not maintain more than 4 to 6 weeks inventory. The supplier must keep the inventory and supply Poon when necessary. Its suppliers buy frozen fish mainly from England and Norway, canned products from Japan and Portugal.

Products of Interest:

- broken shrimp, bulk package
- squid tails and tentacles
- herring kipper
- frozen lobster (100 kg./year)
- mackerel (have imported Jack mackerel until now)
- canned crab meat, sardines and tuna
- mullets

Packaging specification: 10 Kg shatterpack

Prices: Following are tender prices received by Poon for the six month period starting January 1, 1982.

ITEM	SUPPLIER	PACKING	PRICE (C+F) CDN \$	UNIT
Cod Fillets	Abu Zahrah	24 x 400 G.	63.16	Case
Haddock Fillets	Saudi Foods	24 x 400 G.	63.16	Case
Pomfret	Saudi Foods		3.16	Kg.
Arabic Fish	Abu Zahrah		1.75	Kg.
Squid	Foodic		1.40	Kg.
Jack Mackerel	Abu Zahrah		1.01	Kg.
Sardines		24 x 10 Oz.	18.95	Case
Tuna		24 x 150 G.	30.88	Case

Name of Company: Al Rubaiyat - Quadriga Division
Attention: Mr. Yousef A. Frecha
P.O. Box 209
Jeddah, Saudi Arabia
Telex: 400759 ASMOB SJ

Company Description:

This company was formed recently and is part of the BINZAGA group of companies established over 50 years ago. The Quadriga division is actually involved in developing its own labels "PLYMS" for products ranging from window cleaner to frozen steak and frozen fish. British firms have the "inside track" on its frozen fish requirements although the firm is interested in having a diversified group of suppliers. Frozen fish is its primary interest at present. Canned fish is of long term interest. The firm has agents in the U.K. and the U.S. to look for suppliers. The company will want the supplier to absorb part of the cost of printing labels and the promotion and advertising material. This company seems promising for the long term.

Products of Interest:

Cod fish finger;	227 gr.
Cod fillets;	250 gr.
Lemon sole fillets;	250 gr.
Haddock fillets;	250 gr.
Plaice fillets;	250 gr.
Cod steak (1)	1.5 gr.

Note: (1) The so-called "Cod steak" is in fact cod blocks cut in portions of approximately 1 inch thick, 3 inches long, 2 inches wide.

Name of Company: Al-Haneyya Corporation
Attention: Mr. Makki Siddig Ali
P.O. Box 5360
Jeddah, Saudi Arabia
Telex: 400049 LAMIA

Company Description:

This company is involved in imports of canned food as well as being caterers. It used to import fish (container loads) and deliver it to local catering companies. However, the firm recently decided to build cold storage facilities to stock fish and meat for its own catering facilities and for

distribution. A cold store will be completed soon and the company is looking for suppliers. It presently imports from the U.S., Morocco and France, products such as squid, mackerel and salmon. The firm seems well managed and financially capable of buying large quantities of fish. The manager was interested in receiving samples and quotes for the following products.

Products of Interest:

- Sole fillets, Institutional pack, - 20 kg.
- Shrimps
- Smoked salmon
- Squid (whole and tubes)
- Mackerel

Name of Company: Arabian Trading Co. For Cold Storage
Attention Mr. Abdul Aal A. Awad
P.O. Box 1393
Jeddah, Saudi Arabia
Telex: 401065 RIJJAL SJ

Company Description:

This company is involved in fish imports mainly for wholesalers but also for caterers (who look for the cheapest prices and bulk quantities) and some hotels. For this firm quality is not a priority; prices are more important as the food it purchases and/or prepares is intended for people at the lower end of the economic scale. Imports are mainly from New Zealand (Company name: Sanford, Auckland) - although cheap in price, its products seen at the cold store were of very high quality), Australia and Uruguay. The firm owns 3 cold stores and it imports per year, 350 MT of white croaker, 250 MT of Trevally, 100 MT of squid, 40 MT of red snapper, 70 MT of mullet. The company places orders in August for delivery from the end of October to late April. It does not buy fish during the summer months. The need for strong, flat 10 kg. cartons 10 cm. to 15 cm. thick was stressed due to the very high humidity in the country. Of all the companies visited, this firm seems to be among those offering the best prospect for the future.

Products of Interest: (Some species not available in Canada)

- Squid 350 gr. 14 kg. block
- White croaker H & G, 2-3 count/kg. in bag, 10-12 kg. case, scales on fins on, pan ready.
- Red snapper 200-400 gr., 2 x 5 kg. block in master, block in poly bag
- Hake fillets
- Mullet 700 gr./kg. in 10 kg. box
- Mackerel Up to 800 gr. 1-3 count per kg.
- Flounder, whole
- Sea trout
- Golden smoked herring
- Ocean Perch
- Lobster 400-800 gr.

Price Indication:

- | | |
|-----------------------------|-----------------|
| - Squid from Uruguay | U.S. \$750/MT |
| - Mackerel from New Zealand | U.S. \$620/MT |
| - Flounder, whole | U.S. \$900/MT |
| - Sea trout | U.S. \$1,100/MT |

Name of Company: Dolphin Restaurant
Attention Falal M. Badkook, Owner
P.O. Box 221
Jeddah, Saudi Arabia
Telex: 400190 BADKOK SJ

Company Description:

The Dolphin Restaurant is a top category restaurant specializing in seafood. Its owner also operates a catering service in Jeddah.

In view of the nature of its operations, this company is interested in importing small quantities of luxury fishery products such as lobster (in Jeddah, hotels featuring live lobster charge as much as 160 SR or approximately Can. \$79 per plate) and smoked salmon, as well as ordinary frozen fish of the more common species. Current price quotations from various Canadian firms would be appreciated. Arabic translations of the various species available should be included.

Products of Interest:

- Lobster (fresh and frozen in brine)
- Scallops
- Smoked salmon
- Crab
- Squid (skinless, tube)
- Sole (flounder)
- Halibut
- Red snapper

Name of Company: FOODIC
Attention Peter W. Buckworth
P.O. Box 2424
Jeddah, Saudi Arabia
Telex: 402674 FOODIC SJ

Company Description:

This company deals with most food products and imports mainly from Australia, U.S.A., U.K. and New Zealand. It recently completed the building of a Warehouse/Cold Store in Jeddah with a capacity of over 1,000 MT dry goods and of Freezer/Cold Store stock. Foodic concentrates mainly on cheap fish that it generally imports from New Zealand. It only buys by container load. The firm is very well established in Saudi Arabia and offers an excellent potential for companies able to supply cheap fish.

Products of Interest:

- Squid Head and Tentacles 10 kg. pack
- Squid tails
- Whole squid
- Mullet and whitefish
- Shrimp I.Q.F. 6/5 pds., 26-30;31-40;41-50.
- Cod H & G.

Prices Indication: (From New Zealand)

- Dory, H & G; US \$1,050/MT
- Barracuda fillets, skin on; U.S. \$1,350/MT
- Hoki, H & G; US \$1,150/MT

Name of Company: Shobak Group
Attention Ramzi N. Sawaya
P.O. Box 5470
Jeddah, Saudi Arabia
Telex: 402527 SHOBAK SJ

Company Description:

The Shobak Group is a large firm which provides catering and general services to hotels and hospitals. It serves some 45 000 meals each day, with 14 day or 7 day cycle menus at each location. Fish is one of its major items, particularly due to the large number of Phillipinos and Koreans that are employed in the work camps. Its operations are scattered across the main centres of the Kingdom.

The Shobak Group purchases its fish through a wholesaler. The firm would be interested in importing two or three containers per month.

Products of Interest:

- Sole fillets
- Cod
- Squid

Name of Company: Al-Higgi Cold Stores
Attention K.M. Higgi
Ben Zaqr Street
Riyadh, Saudi Arabia
Telex: 401731

Company Description:

This company is relatively small and is involved in imports of canned food, frozen meat, fish and chicken. It buys directly from importers and supplies products to caterers, hotels and supermarkets in the Riyadh area.

Products of Interest:

- White croaker I.Q.F. in polybags (200 MT/year)
- Pomphret
- Red Snapper, round in block 2/4 kg.
- Mullet, head on
- Mackerel

Name of Company: Abbar and Zainy Cold Stores
Attention Mr. Elio Mondin
P.O. Box 2495
Jeddah, Saudi Arabia
Telex: 401728 FRUTTA SJ

Company Description:

This company, one of the largest in Saudi Arabia, is a major importer of frozen fish. It also built and operates the Jeddah fish market. It supplies mainly small local grocery merchant who account for an estimated 85% of the Kingdom's food sales. A & Z's strategy is to obtain a small mark-up but deal in large volumes. The firm also imports fish for catering companies and through contracts with them, feeds approximately 50,000 people/day working in labour camps. For that particular market, the firm is interested in cheap fish. A & Z have (own or lease) 18 ships which carry food and fish products. Exports from the U.S. are mainly from Seattle, L.A., and Tampa. Last year A & Z indicated that it imported 3,000 to 5,000 MT of fish which would give it roughly 1/3 of the Saudi import business.

Products of Interest:

- Squid; tubes and tentacles; round
- Mackerel
- Round flounder
- Hake fillets
- Mullet - whole
- Limited interest in frozen salmon, sole, cod, pickerel and Ling fish which could be used to round out shipments.

Species Imported by A & Z:

- Red snapper (not white) - whole, 200-600 gr. imported from Argentina and Brazil
- White croaker (Nuebi) - headless and gutted with fins removed, 2-3 pieces per poly bag, 12-20 kg. per carton, imported from Uruguay.
- Trevally, from New Zealand (US \$1,600 C&F Jeddah)
- Pomfret - whole, imported from S. America (US \$2,200 C&F Jeddah)

Name of Company: Abbar and Zainy Sodexo
Attention Oleg Thomson
P.O. Box 41491
Riyadh
Telex: SODEXO 203171 SJ

Company Description:

Abba and Zainy Sodexo is the Saudi affiliate of the French Sodexo catering conglomerate. With headquarters near Paris, Sodexo operates in 25 countries and serves some 500 000 meals daily in labour camps, factories, schools, hospitals and other institutions. In Saudi Arabia, Sodexo has a staff of 1,200 and serves 50,000 meals daily, mostly in the labour camps of French, Belgian, Dutch, Spanish and Italian firms. It also operates in the United Arab Emirates.

Products of Interest:

- Squid (tentacles)
- Squid, whole
- Mackerel, round
- Flounder, round

Name of Company: Altawil Food Services
Attention Clive Haggett-King
P.O. Box 40205
Riyadh
Telex: 202771 FOODS SJ

Company Description:

Altawil Food Services is a 100 per cent Saudi-owned firm specializing in catering and other services for industry. It serves some 25 000 meals daily in labour camps and institutions of various types, mostly in the Riyadh area. The company is looking for low-cost fishery products to feed foreign workers in labour camps. Its requirements are two to three containers per month.

Products of Interest:

- Squid, head and tentacles
- Cod, 2-5 kilo, gutted and head on
- Haddock, 1 kilo, gutted and head on
- Mackerel, round
- Bluefish

Name of Company: Khalifa Algosaibi Cold Stores
Attention Mr. Ahmed O. Al-Hamed
P.O. Box 222
Dammam, Saudi Arabia
Telex: 601035 GOSAIBI SJ

Company Description:

This company is one of the largest in east Saudi Arabia where the majority of the oil rigs and labour camps are located. The company owns 5 factories and will soon have completed a 15,000 square meters cold store facility. The company imports all types of food products and is the agent for Kraft Canada in Saudi Arabia. The company deals in large volumes and serves a large number of labour camps, oil rigs and private stores and hotels. It always buys container loads and during the visit placed an order of more than 80 MT. The company offers very good potential if the price is right.

Products of Interest:

- Canned sardines in oil 100/92 gr.
- Canned salmon 24/16 oz.
- Canned tuna
- Canned mackerel in tomato sauce 48/7 oz.
- Flounder fillets 2/30 lbs. interleaf
- Flounder fillets cello wrap 10/5 lbs.
- Round frozen herring 3-5 count/kg. 14 kg. case
- Cod I.Q.F. fillets 4 oz. + 25 lbs. case
- Ocean perch fillets retail pack 10/5 lbs.
- Ocean perch fillets shatterpack 2/30 lbs.
- Mackerel round frozen 1-3 count/kg.
- Squid tube, skinless, no tail
- Frozen salmon
- Frozen mullet

Name of Company: Saidi Catering & Contracting Co.
Attention Claude Abinader
P.O. Box 258
Al-Khobar, Saudi Arabia
Telex: 670038 CASERV SJ

Company Description:

This company is among the largest catering firms in Saudi Arabia. It serves a total of 70 locations including

three large ARAMCO projects (The U.S. - Saudi Arabia oil joint venture). It feeds a total of 26,000 people, three times a day. Up to now the company has dealt with U.K. firms as regards its fish requirements. Purchases are made by tender on a monthly basis for delivery 2-3 months later. The company also has connections in Lebanon where large quantities of fish are purchased.

Products of Interest:

- Sole fillets skinless 6/7 lbs.
- Cod fillets skin on 4/15 lbs.
- Haddock fillets skin on 4/15 lbs.
- Mackerel round
- Shrimp

Note: The Canadian Association of Fish Exporters (CAFE) is now on the tender mailing list of this company.

Name of Company: Rezayat Catering & Support Services
Attention Mr. Klaus W. Ley
P.O. Box 90
Al-Khobar, Saudi Arabia
Telex: 67006 REZYAT SJ

Company Description:

This company is the purchasing unit in Saudi Arabia for a large multinational corporation based in England. (Rezayat Trading) It has contracts to feed 2,000 people per day and also provides food items for the Rezayat Motel division. The firm would like to work on long term contracts and obtain fish on a monthly basis. It is presently dealing with firms in the U.K.

Products of Interest:

- Frozen lobster (individually frozen)
 - Mackerel
 - Frozen salmon
 - Canned salmon
-

SAUDI ARABIASupermarket Prices - 1982Frozen Fish

<u>Product</u>	<u>Origin</u>	<u>Size</u>	<u>Price SR</u>	<u>Dlrs (Cdn. \$)</u>
Cod Chunks "Birdseye" IQF in tray	U.K.	10 oz.	16.25	5.70
Crabmeat "Luxury" Clouston	Canada	400 gr.	50.00	17.54
Rainbow Trout (2 Trout Panready)	Denmark	340 gr.	11.00	3.86
"Prisco" Skinless Haddock Fillets	Denmark	454 gr.	11.25	3.95
"Findus" 10 Cod Fingers-Breaded	U.K.	10 oz./283 gr.	8.25	2.89
Kipper Fillets with Batter "Findus"	U.K.	5 oz./170 gr.	5.70	2.00
10 Fish Fingers "Emborg"	Denmark	300 gr.	5.20	1.82
Cod Fillets "Prisk"	Denmark	400 gr.	10.80	3.79
10 Cod Fish Fingers "Birdseye"	England	283 gr.	10.25	3.60
Haddock Fillets "Emborg"	Denmark	400 gr.	10.50	3.68
Haddock Fillets "AlgoSaibi Foods"		14 oz./400 gr.	9.20	3.23
Cod Fillets "Dane's Pride"	Denmark	1 lb/454 gr.	12.25	4.30
Plaice "Dane's Pride"	Denmark	1 lb/454 gr.	14.25	5.00
Lemon Sole "Dane's Pride"	Denmark	1 lb/454 gr.	16.25	5.70
Lemon Sole S/O Fillets "Dane's Pride"	Denmark	400 gr.	13.50	4.74
Lemon Sole S/O Fillets "Prisco"	Denmark	400 gr.	14.00	4.91
Haddock Fillets "Dane's Pride"	Denmark	454 gr.	11.25	3.95
Founder Fillets "Emborg"	Denmark	400 gr.	11.25	3.95
Herring Fillets HSG "Prisco"	Denmark	10.5 oz.	7.00	2.45
Plaice Fillets "AlgoSaibi Foods"	Denmark	400 gr.	10.80	3.79
Plaice Fillets "Emborg"	Denmark	400 gr.	11.25	3.95
Cod Fillets "Nova-Nordisee"	W. Germany	400 gr.	8.50	2.98
4 Cod Fish Cakes "Findus"	U.K.	200 gr.	4.00	1.40
Plaice Fillets "Dans Cod"	Denmark	300 gr.	10.80	3.79
Cod Steaks in Parsley Sauce "Ross" "Sail in the Bag"	U.K.	5.29 oz.	6.00	2.10
Cod Steaks in Batter Sauce "Ross"	U.K.	5.29 oz.	6.00	5.82
Fish Fingers "Birds Eye"	U.K.	453 gr.	16.60	3.68
2 Rainbow Trout "Prisco"	Denmark	12 oz/340 gr.	10.50	3.60
Rainbow Trout "Dan's Pride"	Denmark	12 oz/340 gr.	10.25	2.54
Smoked Salmon "Emborg"		50 gr.	7.25	3.16

Canned - Tinned Products - 1982

<u>Product</u>	<u>Origin</u>	<u>Size</u>	<u>Price SR</u>	<u>Dlrs (Cdn)</u>
Chunk White Tuna "Chicken of the Sea"	U.S.A.	9½ oz.	9.00	1.67
Chunk Salmon - Dist. by Safeway	U.S.A.	7 3/4 oz/220 gr.	4.75	2.19
Herring in Spice Sauce with Mushrooms "Weber & Shut"	W. Germany	10½ oz.	6.25	2.19
Herring Fillets in Curry Sauce	W. Germany	10½ oz.	6.25	2.19
Herring Fillets in Cream Sauce	W. Germany	10½ oz.	6.25	2.19
Herring Fillets in Mushroom Sauce	W. Germany	10½ oz.	6.25	2.19
Herring Fillets in Hungarian Schnetsil Sauce	W. Germany	10½ oz.	6.25	2.19
Herring Fillets a la Provincial	W. Germany	10½ oz.	6.25	2.19
Herring Fillets in Lemon Sauce	W. Germany	10½ oz.	6.25	2.19
Herring Fillets in Radish Sauce	W. Germany	10½ oz.	6.25	2.19
Smoked Herring Fillets in its own Juice	W. Germany	10½ oz.	6.25	2.19
Mackerel in Vegetable Oil "King Cup"	Japan	3 1/3 oz.	1.75	0.61
Mackerel Fillets in Soya Sauce	Denmark	½ oz/127 gr.	2.50	0.87
Mackerel Fillets	Japan	5 oz.	2.50	0.87
"Guisha" White Meat Tuna	Japan	5 oz.	4.65	1.63
"Libby's" Red Pacific Salmon	U.S.A.	439 gr.	15.25	5.35
Small Shrimps	Taiwan	4.5 oz/128 gr.	7.00	2.46
"Tulip" Pink Salmon	U.S.A.	7 3/4 oz.	9.85	3.46
"Al" Mackerel in Tomato Sauce	Malaysia	15 oz.	2.50	0.87
Mackerel in Natural Oil		15 oz.	2.50	0.87
Sockeye Red Salmon "Libby's"	U.S.A.	15½ oz.	13.85	4.86
Pink Salmon "Libby's"	U.S.A.	16 oz/439 gr.	11.50	4.03
"Tulip" Ocean Salmon	U.S.A.	15½ oz.	16.65	5.84
Crabmeat - Grade B	Thailand	5 oz.	5.85	2.05

KUWAIT

Overview of the Kuwaiti Fisheries Market

Kuwait has one of the highest per capita GNP's in the world and a population now estimated at close to 1.5 million. Official statistics for 1980 show that expatriates account for 58.5 per cent of the total. They include Jordanians, Palestinians, Egyptians, Iraqis and Syrians, as well as Western Europeans and Americans. Per capita fish consumption is relatively high at over 11 kg. and continues to rise.

A domestic fish production in excess of 6,000 MT per year is now supplemented by imports estimated at close to 9,000 MT. About 20 per cent of these imports are re-exported to neighbouring Gulf States.

Native Kuwaitis have a marked preference for fresh, whole fish and are reluctant to purchase frozen or canned products. But the market for the latter products is still considerable in view of the large percentage of expatriates among the population. It is estimated that about 80 per cent of all imported fishery products are consumed by non-Kuwaitis.

Kuwait's imports of fishery products have more than doubled since 1976, with the most noteworthy increases in frozen fish and in canned products. The most recent statistics available from the Central Office of Statistics of the Kuwait Ministry of Planning show that in 1979, imports of fresh, chilled and frozen fish totalled 6,280 MT, an increase of 2,556 MT over the previous year. The main suppliers were India, Uruguay, Argentina, Namibia, Pakistan, New Zealand and the United Kingdom.

According to the same source, imports of canned fish in 1979 reached 2 199 MT, an increase of 821 MT over the previous year. The main suppliers were Japan, Yugoslavia, Morocco, Spain and Thailand.

Salted, dried or smoked fish are also imported, but only in small quantities. In 1979, such imports totalled approximately 128 MT and came primarily from the United Kingdom, Argentina, South Korea and Pakistan.

So far, Canadian fish exports to Kuwait have remained very low. In 1979, they totalled \$23,000 and the following year they reached \$61,000. These exports have been mainly canned fish, including sardines, and very small quantities of filleted sea fish, lobster and shrimp.

Market Characteristics

In Kuwait, a large number of staple foods sold through government cooperative stores are subsidized by the State. The products which are so subsidized include canned tuna and locally produced fish.

As noted above, about 20 per cent of the fishery products imported by Kuwait are re-exported to Saudi Arabia, Iraq and other Gulf states. One importer stated that exports to Saudi Arabia had gone down this year. So had exports to Iraq because the Iraqi government was not granting as many import permits as before to private firms.

Kuwaiti fish importers obtain the major part of their supplies from India, Uruguay and Argentina. The species most in demand are pomfret, croaker and red snapper. Hake, mullet (from New Zealand and Canada), trevally, mackerel and squid were also imported.

The main fish consumption months in Kuwait are November to February, when temperatures are somewhat cooler. Importers like to place their orders in the spring, with deliveries beginning in September.

With few exceptions most foodstuffs, including fish, enter Kuwait duty-free. For information on Kuwaiti trading procedures, transit regulations and specifications for canned and other foodstuffs the reader should consult: Worldwide Fisheries Marketing Study - Kuwait.

Calls on the Trade

During their stay in Kuwait, members of the Mission called on two privately-owned and one government company involved in fish imports. Unlike Saudi Arabia, the catering industry in Kuwait is not extensive and for this reason no caterers were visited.

Following is a short review of the firms visited. Interested Canadian companies should contact these firms directly with copy to the Commercial Division of the Canadian Embassy, Kuwait, to the attention of Ronald Lockhead, telex MCAN 23549KT.

Name of Company: Nimer Store
Attention Salim Jallad
P.O. Box 689
Kuwait, Arabia
Telex: NIMER KT 2249

Company Description:

The company is a small importer of fish products. It supplies local stores and some labour camps. The company used to export to Saudi Arabia approximately 60 per cent of the products it imported. This is changing, however, with the Saudi firms now importing directly. The firm is well established in Kuwait and Saudi Arabia and have purchased fish previously from Canada. It now imports essentially from New Zealand, Uruguay and Argentina. The company does not buy fish during the summer months. It usually takes its orders in August for delivery in September.

Products of Interest:

- Mullet, head on, 500 gr. - 1 kg, 10 kg. box (from New Zealand)
- Hake fillets, 200-300 gr. pieces, packed in 1 kg. bag (from Uruguay and Argentina)
- Mackerel, whole in 1 kg. pack, price \$1,000/MT (from India) - Squid, whole, 250-300 gr. (from New Zealand, Uruguay)
- Any fish at less than \$1,000/MT C & F.

Name of Company: United Fisheries of Kuwait K.S.C.
Attention Farid Tawfic Salem
P.O. Box 22044
Sheem, Kuwait
Telex: 22285

Company Description:

This is the only fishing company in Kuwait and is 49 per cent Government owned. The company owns thirty shrimp trawlers that caught 950 MT last year. United Fisheries has recently started importing frozen fish and intends to develop further in that field. The firm distributes its products through its Co-op stores. For the time being it imports only round fish but by July, 1982, it will start to import fillets. The company offers very good potential for the long term as it does not yet have regular suppliers of frozen fish. The company also intend to process fish in Kuwait by 1983.

Products of Interest:

- White Croaker H & G
- Cod blocks
- Pollock fillets, 400 gr. portions
- Shrimp breaded
- Carp fillets
- Sole Fillets
- Pollock H & G.

Name of Company: Ra'ad Stores Co.
Attention Mr. Gaby W. Matar
P.O. Box 386
Kuwait, Arabia
Telex: RADSTO KT 2251

Company Description:

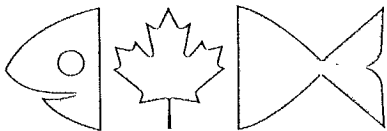
The company, which is 25% owned by United Fisheries of Kuwait, is the largest purchaser of fish from Uruguay. It buys an average of 2,500 MT/year of Sea Trout and White Croaker that are shipped on a continuous basis from that country. The firm supply individual stores, catering groups and labour camps. With a limited market in Kuwait, a large proportion of the fish purchased by the firm is re-exported to Saudi Arabia and Lebanon. The company offers very good potential and is interested in buying products that could be used as substitute for the species they already import. Samples should be sent when offering products.

Products of Interest:

- Red Snapper IQF 400-700 gr.
- Alaska Pollock, Head on, gutted, up to 1.2 kg.
- Squid, whole, 300-500 gr.
- Cod, large size (for Lebanon)
- Mackerel, whole
- Pacific Hake

Price Indication:

- Pollock fillets; US \$1,200 - 1,300/MT
- Trevally: US \$1,600/MT



FISHERIES MARKET DEVELOPMENTS

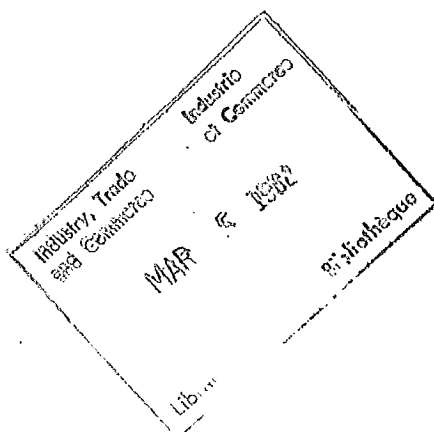
FMD NO. 3

FEBRUARY 1982

SITUATION REPORT ON HERRING SUPPLY AND DEMAND IN EUROPE

You will find enclosed a report giving a short overview of the herring market in individual countries of Europe.

The reports were prepared by the Commercial Division of the Canadian Embassies and reproduced here as per the original telexes.



Aussi disponible en français



Government
of Canada

Gouvernement
du Canada

Industry, Trade
and Commerce

Industrie
et Commerce

Agriculture, Fisheries and Food Products, Ottawa, Canada K1A 0H5

SITUATION REPORT - HERRING

A. From Germany:

Total landings 1981 not yet published. Only available figure includes October 81 and amounts to 6,679.5 M/T (total landings 1980 9,299 M/T caught weight).

Herring imports and exports statistics available until 30 Nov. 81.

<u>Product</u>	<u>Imports</u>	<u>Exports</u>
Herring, whole, fresh	16,123.9	17.8
Other Herring, fresh	31,945.3	110.7
Herring, whole, frozen	7,482.3	332.1
Other Herring, frozen	26,360.7	1,217.8
Herring Fillets, frozen	879.2	61.9
Herring, whole, salted	10,455.1	105.1
Herring, headless or split dried	1,293.0	26.4
Herring Fillets, dried, salted	1,794.2	--
Herring, smoked	642.8	19.8
Herring, barreled, cured	6,380.7	17.7
Herring in other containers, processed, including canned	4,409.5	5,279.4

1. German trade is of the opinion that 1982 consumption figures in FRG will be down considerably, whereas in 1981 a total consumption of 200,000 M/T of herring (caught weight) seems to be realistic. In 1982 figure is expected to be down by 5-8 percent. This negative outlook is traced back to the general economic situation which led to the highest unemployment figure after Second World War. Additionally, the economic outlook, not only for FRG, but for the whole of Europe, is expected to remain negative until at least late summer.

2. As to market share Canadian suppliers could get in 1982, trade is not in a position to judge any figure. We feel, however that provided Canadian processors stress better quality and Danish landings do not exceed 1981 figures, Canada may count on approximately the same amount supplied in 1981.

B. From Finland:

Finland does not catch Atlantic herring.

Finland imports bulk herring salt-sugar cured in barrels only. Total imports in 1981 5,001 M/T. Sources:

Iceland 3,219 tons. CDA 808 Tons. Norway 690 tons. Sweden 135 tons, Ireland 76 tons, other 73 tons. No exports.

Total imports of marinated herring in air tight containers 1981 484 tons main source Sweden 477 tons. Exports of marinated herring 76 tons.

Consumption of herring in Finland is steady 5,000-6,000 tons per year.

2. Return of Icelandic herring has reduced demand for Canadian herring. Canada should be able to maintain its position as supplier of spring catch herring to Finland provided histamine content can be controlled. Demand around 1,000 tons.

C. From the Netherlands:

1. Year-end stats for 1981 not yet available.

2. Dutch herring landings totalled 8,700 tonnes (of which 8,300 tonnes fresh/frozen, balance salted) in Jan-Oct 81.

3. In same period imports fresh/frozen totalled 56,300 tonnes, salted 22,000 tons. Exports of fresh/frozen were 15,400 and salted 38,300 tonnes.

4. Cannot give indication of 1981 consumption. 1980 figure for herring (excluding canned) stood at 2.3 Kg/Capita, or 32,700 tonnes total.

5. Impossible to provide reliable indication for 1982 landings but our guesstimate is for less than 20,000 tonnes.

6. Netherlands has relatively high import requirements. We believe Canadian exporters could substantially expand its share of this trade (frozen whole round, butterflies, salted for smoking and even matjes) when able and willing to meet high local quality standards.

D. From Belgium:

1981 figures for herring as follows:

Landings 3,000 M/T, imports 6,365 M/T, export 5,290 M/T, consumption 4,075 M/T. Situation in 1982 will of course depend on EC Herring quota which has not as yet been discussed at commission. According to Belgian Ministry of Fisheries in Oostende situation in 1982 should be

approximately the same as in 1981. Therefore potential for Canadian products in this area for 1982 should be approximately the same as in 1981.

E. From Norway:

Norway 1981 official landing figures herring total 15,090 tonnes. Imports fresh 46, frozen 270, fillets 55, salted 375, canned small herring 715, otherwise preserved 870. Exports fresh 8,120, frozen 999, fillets 146, salted 4,256, canned small herring 10,985, otherwise preserved 334. Projections for 1982 envisage little change but with provision that if suitable Canadian barrelled herring becomes available, Norway would possibly be in market for reprocessing.

Iceland: Currently available figures 1981 are total catch 37,944. Total exports 28,173. Projection 1982 not available as fishing quota not yet set. Doubtful potential for Canadian products.

F. From Sweden:

1. Swedish landings (landed weight metric tons) were Jan-Nov 81 (latest available figures) with Jan-Nov 80 in brackets. In Sweden 99,317 (96,079) landed abroad - primarily in Denmark - 19,802 (25,200 exceptionally high figure) totalling 119,119 (121,279).

2. Imports in Metric Tons Jan-Sep 81 (latest available) Jan-Sep 80 in Brackets: A) Stat no CCC 03.02.209 salt cured barrelled herring (other than Icelandic; large and spring): total 2,597 (3,824) supplied by Norway 1,099 (401) Denmark 18 (0) Iceland 481 (692) Ireland 61 (119) Canada 929 (2,565). B) Stat no CCC 16.04.409 seasoned herring (whole or pieces) whether or not simply salted or sugar-cured. Total 2,984 (3,826) supplied by Norway 30 (20) Denmark 263 (255) Iceland 1,848 (2,496) Ireland 63(295) Canada 768 (788).

3. Exports Jan-Sep 81. A) CCC 03.02.209 total 133 (284) to Norway 57(53) Finland 64 (55) W. Germany 11 (127) E. Germany 0 (34) Britain 0 (11). B) CCC 16.04.409 total 454(454) to Norway 74 (146) Denmark 58 (41) Finland 42 (120) W. Germany 239 (102) Britain 18 (19) U.S.A. 12 (20).

4. Consumption. No up to date figures available. As you are aware above Canadian herring products used primarily for further processing into various marinated herring products sold in fish shops and to catering trade and also put into glass jars or cans for retail trade.

Consumption of such products unfortunately declining moderately every year and declining trend anticipated continue because of changes in eating habits - new generation more tuned to menus such as pizzas, hamburgers, bar-b-qued beef, spare ribs, broilers. Herring importers/processors thought running campaigns to combat decreasing demand in order maintain market.

G. From France:

1. Unofficial information suggests that French production of herring was much higher than official figures indicate.

2. Information obtained from Customs covers imports/exports of fresh and frozen herring only. Measure of weight is quintaux (100 kilo).

<u>Frozen Herring</u>	<u>Imports</u>	<u>Exports</u>
Belgium and Luxembourg		1,783
Zaire		568
Netherlands	2,309	1,679
Germany	343	1,212
United Kingdom	685	193
Ireland	9,448	
Iceland	9,647	
Norway	1,089	
U.S.A.	3,719	
Canada	14,272	
EEC	12,801	4,867
Total	41,885	5,455

<u>Fresh Herring (for eight months only)</u>	<u>Imports</u>	<u>Exports</u>
Belgium and Luxembourg	136	1,884
Netherlands	657	35,321
Germany		23,418
United Kingdom	639	8,215
Ireland	4,151	
Denmark	13,110	3,054
Sweden	2,234	
EEC	18,693	71,908
Total	21,874	71,994

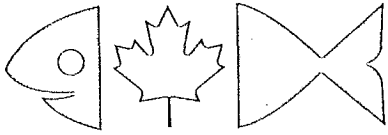
3. Following information obtained from Comite Central des Peches Maritimes. In 1981, French herring production was 13,174 tons. Imports of fresh herring: 3,325 tons. Imports of frozen herring: 4,189 tons. Imports of salted herring: 2,108 tons. Imports of canned herring: 1,905 tons. Exports of fresh herring: 8,276 tons.

4. No projections available for 1982. However, as North Sea herring catch increases, French market could become even less accessible to Canadian herring. At present French importers are very cautious about herring market and, to minimize risks, prefer small quantities when purchasing Canadian product.

H. From England:

1. Cumulative total landings Jan-Aug 1981 inclusive released today for England and Wales, as follows:

By British fishing vessels 1,265 tonnes; by foreign fishing vessels nil.



FISHERIES MARKET DEVELOPMENTS

FMD NO. 1

JANUARY 1982

JAPANESE RETAIL FISH PURCHASES

Attached is a chart showing the per capita purchases of various fish species and fish products on Japanese retail market. Fish purchases by restaurants, institutions and the processing industry are not included.

Since these figures show the fish species chosen by the Japanese housewife according to perceived value and the preferences of her family, the table can give a good indication of market potential.

Att.

Aussi disponible en français.



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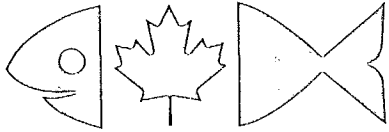
Agriculture, Fisheries and Food Products, Ottawa, Canada K1A 0H5

Japanese Retail Fish Purchases (excludes restaurants and processors)
 Achats de poisson en détail par les Japonais (restaurants et transformateurs)

(grams per capita - gr. par habitant)

	<u>1977</u>	<u>1978</u>	<u>1979</u>	<u>1980</u>	<u>1981</u>	1981/1980 % Change % de Changement
Fresh and frozen fish and shellfish - Total						
Poisson et crustacés frais et surgelés - Total	14,779	14,877	14,567	14,673	8,053	-1
Tuna - thon	861	976	889	868	503	+6
Horse mackerel (Trachurus) chinchard	698	592	622	565	275	-17
Sardine - sardine	862	708	615	651	402	-4
Skipjack - bonite à ventre rayé	310	375	366	342	227	-8
Flounder - flétan	769	715	707	731	464	+5
Salmon - saumon	291	276	262	282	138	-8
Mackerel - maquereau	931	912	780	826	393	-7
Saury - balaou	370	574	667	594	164	-22
Cod and pollack - morue & goberge	259	224	221	233	118	-4
Sea bream - dorade	278	302	295	281	140	-16
Yellowtail - limande à queue jaune	543	608	680	659	290	-12
Squid and Cuttlefish - calmar et sèche	1745	1699	1733	2078	1167	+6
Octopus - poulpe	410	405	323	260	164	+28
Shrimp and crab - crevette et crabe	965	1070	1004	1007	505	+1
Other Shellfish - autres mollusques et crustacés	1513	1513	1503	1334	876	+3
Salted and drief fish - Total						
Poisson salé et pêché - Total	4703	4615	4662	4880	*	
Dried Squid - calmar séché	59	58	48	54	18	+1
Salted Salmon - saumon fumé	865	815	871	963	453	-1
Dried Skipjack (seasoning) bonite à ventre rayé (séché pour assaisonnement)	85	80	82	81	40	+0
Pollack roe - roque de goberge	220	168	202	238	135	-4
Beef - boeuf	2196	2432	2461	2395	1363	+3
Pork - porc	5092	5148	5318	5460	2937	-6
Chicken - poulet	3192	3404	3620	4696	2039	-3

* not available - non disponible



FISHERIES MARKET DEVELOPMENTS

FMD NO. 12.

DECEMBER 1981

SITUATION REPORT ON JAPANESE MARKET FOR FISH PRODUCTS

You will find enclosed a report giving a short overview of the Japanese market as regard the main species of Canadian fish sold in that country.

The report was prepared by the Commercial Division of Industry, Trade and Commerce in Tokyo and reproduced here as per the original telex.

Aussi disponible en français



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Agriculture, Fisheries and Food Products, Ottawa, Canada K1A 0H5

SITUATION REPORT - FISH PRODUCTS

Int. Trade
and Com. Dept.
Date: 10-11-82

1. Japanese landings in first nine months calculated at 7.5 million M/T. Increase of 2.4 percent landings third quarter estimated at 3 million M/T, decline of 3.8 percent from same period 1980. Decline in quarter concentrated in August with September landings virtually identical to preceding year and trade reporting good volumes October/November. If reports accurate, Japanese catch in 1981 will likely exceed record of 11.1 million M/T caught last year. Although average value/kg in nine months is slightly below same period 1980 (yen 159 vs 167), prices have strengthened since beginning of year with third quarter average yen 151 (1980 - 145) and September yen 129 (122). Again unofficial trade reports show October/November prices continuing to run above last year. Sales reported good and inventory accumulation not excessive.

2. Imports during third quarter totalled 300 thousand M/T, an increase of 10.6 percent over second quarter/81 and 18.7 percent above same quarter/80. Total imports first nine months were 836 thousand M/T. Increase of 5.2 percent over same period/82. Average CIF values/Kg also registered increases of 14 percent in quarter (yen 917 vs 803 and 6 percent from yen 726 in nine months 1980 to yen 770 in 1981. Imports by major categories as follows: A) Fresh and Frozen 633,123 M/T with CIF value of yen 488,295 million (approximately Canadian dollars 2,600 million) compared to 541,733 M/T with value of yen 424,859 million in 1980, B) Salted, dried and smoked products of 30,019 M/T valued at yen 63,151 million (Canadian dollars 340 million) compared to 25,574 M/T valued at yen 46,066 million in 1980), C) Prepared/Preserved products 30,025 M/T valued at yen 27,314 million (Canadian dollars 145 million) vs 28,493 M/T worth yen 29,142 million in 1980.

3. Salmon: Season for autumn (ROE) salmon in Hokkaido and Northern Mainland started very early this year and record harvest in excess of 100,000 M/T (70,000 in Hokkaido and 30,000 on Mainland) is expected. Earlier trade estimates which placed 1981 salmon imports at 50,000 M/T have been revised upward to 70,000 M/T which will also be record level. Increased imports stem from good late season catch of Alaska salmon. At end September imports totalled 62,442 M/T (54,694 from USA, 3,272 Canadian: 2942 - N/Korea, and 1156 USSR). Industry estimates following breakdown by species: 43,000 M/T sockeye, 8000 M/T each Chum and pink, 1500 each coho and spring. based on above, total 1981 salmon supply will exceed 220,000 M/T including Pacific and sea of Japan (pink) catch in spring months. Large catch has led to decline in prices and sales are very active in all salmon categories (i.e. fresh/frozen, salted, smoked and processed). As prices of imported salmon were high in anticipation of poor Alaskan catch. Sales of these products are relatively slow and inventories are currently estimated at 35,000 M/T. Current prices/Kg of imported frozen sockeye on Tokyo market are: semi-dressed (head-on), size 4-6 is yen 1,350-1,400; size 5-9 yen 1,450-1,600 per Kg.: and full dom,dressed 4-6 at yen 1,400-1,450.

4. Salmon roe: as of September 1981, imports totalled 8,143 M/T including 7,345 from USA, and 769 from Canada. In full year quantity expected to be at record, possibly exceeding 10,000 M/T (8,600 in 1982). Inventories on 10 November estimated at 2,800 M/T. This stock, plus imports during

November/December expected to provide year-end supply in excess of 4,000 M/T. Domestic production of salmon roe (Sujiko) is estimated at slightly over 1,000 M/T. Therefore, in anticipation of substantial Sujiko imports, most roe extracted from autumn salmon (approximately 5,000 M/T) went to Ikura production. Decline in prices has led to active sales of both Sujiko and Ikura (mostly to Sushi trade). Trade expects Sujiko sales this year will exceed 2,500 M/T and carry-over to 1982 will be 1,300 M/T (700 at 1980 end). Current Tokyo wholesale market price grade one Alaskan/Canadian Chum roe is yen 4,000 - 4,300/Kg. down from yen 4,300 - 4,500 in mid-September and yen 4,700 - 5,000/Kg. in mid-April.

5. Herring roe: No significant changes in supply picture have occurred. Total 1981 supply calculated at approximately 12,000 M/T comprising 3,000 M/T carry-over from 1980, 1,800 M/T extracted from imported Alaska roe herring and imports of 7,500 M/T salted (additional 400 M/T frozen roe imported for manufacturing purposes). To September 30, imports salted herring totalled 6,962 M/T including 4,169 from Canada, 1,507, USA 831 S' Korea and 424 Peoples' Republic of China. Although peak season approaching, sales remain slow. Approximately 3,000 M/T fully shaped roe was sold in first ten months and industry expects 7,000 M/T will be sold during entire year if current prices are maintained. Current Tokyo wholesale prices are yen 5,700 - 6,000/Kg for extra large size; yen 5,400 - 5,800 for large size; and yen 5,100 - 5,200 for medium size. Importers and processors conducting joint advantage campaign directed at consumers which includes sampling, TV and pamphlets.

6. Herring roe on kelp: First grade Canadian products selling steadily at slightly lower prices, which reflect price reduction in herring roe. Current wholesale price is yen 5,300 totalled 380 M/T of which 169 M/T came from Canada and 211 M/T from USA. Latter, mostly low grade Alaskan product is less than 50 percent 1980 level.

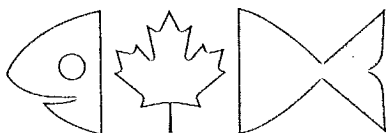
7. Food herring: Domestic catch food herring in East China Sea and Sea of Japan was 2,00 M/T, equivalent to less than third 1980 volume. As result, demand for imported frozen food herring is strong. Poor catches saury and mackerel also contributing to volume as herring used as substitute. Nine months imports frozen herring reached 35,564 M/T (13,804 from Canada, 20,143 from USA including 18,000 M/T of roe herring from Alaska). Due to abundant supply Atlantic food herring from Canada (13,000 M/T contracted) purchases Pacific food herring may decrease.

8. Squid: Poor catches reported for all squid species. Common squid season in seas of Japan is almost over with catch reported at 140,000 M/T (180,000 M/T in 1980). In Pacific, season will continue to mid December but catch not expected to reach 40,000 M/T. Total catch therefore estimated at maximum of 180,000 M/T, nearly 120,000 M/T below 1980. Fresh common squid prices at all fishing ports have increased sharply and, as a result, sales reported very slow. Catch of red squid may reach only 130,000 M/T landed weight (approximately 40 percent is tube form) vs 170,000 M/T in 1980. As result, poor domestic catch, Japanese Government has announced 25,000 squid import quota for second half FY81. However, trade does not expect substantial imports because of poor catches in foreign countries. Current frozen squid price at Tokyo market yen 4,700 - 4,800 per case of 7.5 kgs. containing 26-30 squid (yen 626-640/Kg.), increase of 80-85 percent since July 1981.

9. Black cod: Japanese caught Alaskan black cod selling at yen 500-800/Kg. for fully dressed product. Expanded price range reflects high fat content of autumn caught fish.

10. Capelin: Imports of frozen capelin (mostly females with roe) to end September 1981 totalled 24,162 M/T (13,021 from Norway, 10,572 Canada, 311 Iceland and 257 USSR). Further 1,510 M/T imported in October. Concern for large quantity of extra large size if less than 40 fish/Kg has dissipated. Due to relatively low price, product sold well to public institutions and consumers.

Tokyo - 27 November 1981



FISHERIES MARKET DEVELOPMENTS

FMD NO. 10.

OCTOBER 1981.

NATIONAL RESTAURANT ASSOCIATION

We have arranged again this year for space at the National Restaurant Association Hotel-Motel Show, May 22-26, 1982 at McCormick Place in Chicago, Illinois.

This show over the years has come to be the market-place for companies supplying the food service/lodging industry in the United States. Three-quarters of the attendees have buying influence for the products exhibited at the show. Approximately one-half of NRA show attendees represent top management.

If you are interested in participating in a national exhibit at the show, please contact:

Fisheries and Fish Products Division,
Agriculture, Fisheries and Food Products Branch,
Department of Industry, Trade & Commerce,
Ottawa, Ontario.
K1A 0H5.
Telephone number: (613) 995-8107.

Please let us know by November 2, 1981, so that application forms/contracts can be speedily sent out and returned.

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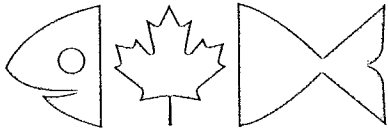
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FISHERIES MARKET DEVELOPMENTS

FMD NO. 9.

OCTOBER 1981

INCOMING FISH PRODUCTS MISSION FROM
SOUTH EAST ASIA

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INCOMING FISH PRODUCTS MISSION FROM
SOUTH EAST ASIA

Industry
and Commerce
001 26 1971

The Fisheries and Fish Products Division of Industry, Trade and Commerce in Ottawa has just completed a mission of fish buyers from south east Asia. Senior executives of ten companies in Singapore, Hong Kong, and the Republic of Korea were invited to Canada and taken on a coast to coast tour of Canada's fishing and fish processing industries. For most, it was their first trip to Canada. Even for those who had been here before it was their first exposure to the full extent of Canada's supply capability.

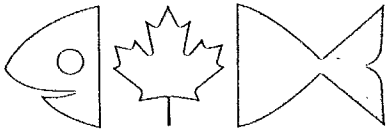
As one Korean visitor admitted;

"Fish has always been an article of commerce to me.
Canadians have made me appreciate it as food."

It is too early to tell how much business was transacted or initiated during this mission (although the amount was considerable and will grow during the weeks ahead) but our visitors raised some very important points which can benefit us all immediately.

1. Asian tastes, and hence product specifications, are different from those of United States or European customers and Canadian suppliers must pay attention to these specifications and take the extra trouble to meet them. For example, their style of cooking requires a thicker fillet than we normally cut and they are accustomed to a lower salt level in smoked fish than are many of our customers.
2. Price quotations should be C & F. They are comparison shoppers and, particularly when dealing with a new supplier, find FOB prices difficult to work with.
3. They appreciated the samples, particularly ready-to-eat product samples which they saw during their tour and they would like to see more. This applies particularly to plants which did not permit photographs in production areas. Many Asians use photographs as an extension of note-taking and as a means of showing their customers what new products are available. While they did not question the no picture policy where it was applied, they would have appreciated a display of products and/or packages which they could have photographed.
4. Because of the distance from Canada to their market, shipping costs rule out many low value products but there is a strong interest in the higher unit value items such as shellfish and smoked fish products. Being able to produce to their specifications (which are not necessarily stricter, just different) is a necessity.

Overall, the response of the mission members to Canadian products and Canadian producers was very good. They saw many products they did not know we had - some which were completely new to them. They were generally satisfied with the quality of what they saw and with our capability to produce products which they believed their customers would enjoy.



FISHERIES MARKET DEVELOPMENTS

FDM NO. 8

SEPTEMBER 1981

SITUATION REPORT ON JAPANESE MARKET FOR FISHING PRODUCTIONS

You will find enclosed a report giving a short overview of the Japanese market as regard the main species of Canadian fish sold in that country.

The report was prepared by the commercial division of Industry, Trade and Commerce in Tokyo and reproduced here as per the original telex.

Aussi disponible en français



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Agriculture, Fisheries and Food Products, Ottawa, Canada K1A 0H5

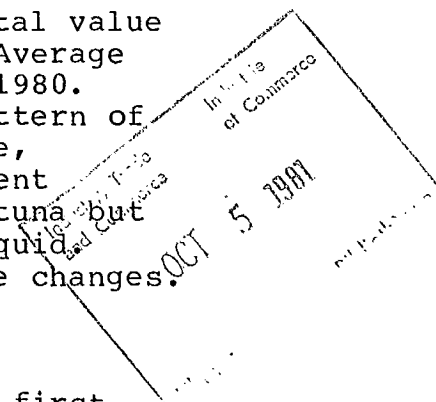
SITUATION REPORT-FISH PRODUCTS

Japanese landings in first half 1981 estimated at 4.4 million M/T, an increase of 7.7% over same period 1980. Total value of landings declined 2.2% to yen 726,000 million. Average landing value/KG this period yen 165 vs yen 219 in 1980. This summer saw pronounced change in traditional pattern of fishing activity in Japanese coastal waters. Change, attributed to presence of strong kurile (cold) current offshore, has led to abundant harvests sardine and tuna but poor catches of common mackerel, saury and common squid. However, it is too early to assess full impact these changes. On shore, inventories of stocks of many species are registering declines.

2. Imports in second quarter registered gains over first quarter but total imports in first six months were 535,000 M/T vs 541,000 M/T in same period 1980. Most of declines traceable to reduction in fish meal while imports for human consumption showed gains. Imports a) fresh and frozen products in first half totalled 382,886 M/TR with cif value of yen 281,514 million (approx. Canadian dollars 1,500 million) compared to 350,157 M/T valued at yen 280,887 million in 1980; b) salted, dried and smoked products also increased to 13,645 M/T worth yen 22,809 million, from 11,117 M/T with value of yen 15,808 million in 1980. Outlook is for continuation of firm demand and total 1981 imports expected to exceed 1980 imports of 1,037 million M/T by slight margin.

3. Salmon: inventories carried over from 1980, and 1980-caught salmon imported during first-half 1981 (approx. 5,800 M/T), have now been sold. Therefore, market is now being supplied by 1981 catch. Imports during 1981 forecast at approx. 50,000 M/T, comprising 29,000 M/T sockeye from North America (37,000 M/T-USA, 2,000-Cda), 10,000 M/T other species from North America, 3,500 M/T from other countries (USSR, North Korea, etc.), plus above noted 6,800 M/T of 1980 catch imported first half 1981. As industry expects domestic catch of autumn salmon to total 75,000 M/T, total 1981 supply estimated at 170,000 M/T, (inc. 42,500 M/T of domestic catch under Soviet-Japanese agreement). Prices in early 1981 reflected Japanese trade anticipations of poor North American catch. As result, some speculative purchases occurred in Hokkaido, which affected price negotiations for Alaska and Canadian salmon. With decreased value of yen against USA speculators are now in loss position. Wholesale price Alaskan sockeye salmon at Tokyo market is currently yen 1,350-1,450/KG (Canadian sockeye selling at slight premium on quality).

4. Salmon roe: trade expects 1981 imports will reach 8,000 M/T (7,000 M/T-USA, 1,000-Cda) down slightly from 8,600 M/T in 80 but sufficient to cover market. Some speculative



buying also occurred in early 1981. Current Tokyo wholesale price grade on Alaska/Canadian chum roe is yen 4,300 to 4,500/KG, down from yen 4,700-5,000 in mid April.

5. Herring roe: Japanese trade prediction total roe supply in 1981 will be 8,500-8,550 M/T, comprising 1,810 M/T domestic extraction and 6,700 M/T imports. Latter includes 3,800 plus M/T from Canada, 1,100 M/T Alaska/San Fransisco Bay, 1,100 South Korea, 500 China, 200 USSR/North Korea. Due to high USA/Canadian prices, trade foresees continuing difficulties throughout 1981 in moving stock. Current Tokyo wholesale prices are yen 5,000-6,000/KG for extra large size: yen 4,800-5,800 for large: and 4,200-4,600 for medium size. Sales are slow.

6. Herring roe on kelp: first grade Canadian products selling steadily at firm prices. Current wholesale price is yen 5,500-5,800/KG at outside market and to HRI trade. Resistance developing against Canadian second grade and Alaskan products.

7. Food Herring: no/no fresh herring sales reported at any whole sale market. Thawed herring sold at yen 750/KG at Tokyo market.

8. Squid: due to strong kurile (cold) current particularly in Northern Pacific, squid fishery pattern has changed. Northern run is very poor especially off both sea of Japan and Pacific Coasts of Hokkaido. To illustrate, Kushiro, a major squid port, reports landings of common fresh squid during July of 41 M/T vs 4,040 in 1980. Some specialists hold view that Southern run common squid has already commenced and stock will not/not reach Hokkaido coasts. Prices now increasing in all Japanese wholesale markets. Despite increases up to 25% prices are still well below 1979 levels. Current price frozen common squid Tokyo market yen 3,300-3,400/case of 7.5 KG, containing 26-30 squid (yen 440-450/KG), up from yen 2,700-2,800 (yen 360-370/KG) in July.

9. Black cod: Japanese caught Alaskan black cod selling at yen 700-730 per kg for full dressed products. Prices and sales are steady.

10. Capelin: Japanese purchases of female with roe from Canada totalled 10,780 M/T and total 1981 imports expected to reach about 24,000 M/T. However, with shortage of protein in USSR, no/no imports of any fishery products are now expected

from that country. Canada has therefore become one of largest suppliers of capelin to Japan. Size distribution of imports from Canada are: 4,500 M/T-less than 40 fish per KG; 1,500 M/T 40/41; 1,500-42/45; 2,000 for 46/50; and 1,200-50/60. Trade experiencing some difficulty selling extraordinary large volume of larger sized squid (4,500 M/T-see above). This size normally distributed in restaurant trade and normal demand said to be approx. 2,000 M/T.



FISHERIES MARKET DEVELOPMENTS

FMD NO. 5

APRIL 1981

Canadian Seafood, Food & Beverage Expo '81,
Boston, Massachusetts, March 30-31, 1981

Attached is a report concerning this recent event.
Appendix 1 of the report provides a summary of issues
discussed at the Seafood Seminar.

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Agriculture, Fisheries and Food Products, Ottawa, Canada K1A 0H5

Canadian Seafood, Food and Beverage Expo '81,
Boston, Massachusetts, March 30-31, 1981

March 30, 1981

The exhibition started at 2:30 p.m. and ended at 7:30 p.m. with seventy exhibitors from the Canadian Seafood, Food and Beverage industry taking part in the event. Approximately 600-700 U.S. buyers attended the show which displayed a strong national image. Whether or not a lot of selling was done is hard to determine at this point but for certain the show was successful in re-exposing these companies to the U.S. market. Also important, was the fact that exhibitors seemed pleased with the show at the end of the day.

March 31, 1981

The Seafood seminar was also a success, with approximately 75 people attending. Speakers were well-prepared and helpful in letting the industry know where they felt future opportunities lay. As well, they were frank enough to let the industry know what areas they had to improve in i.e. presenting a quality product; offering continuous supply; and providing consistent pricing (For more detail see Appendix 1).

Note - A Food seminar was also held on March 31, 1981, which was a success as well. About 30 people attended it.

Notes from Seminar
March 31, 1981
Boston, Massachusetts

A. TRENDS IN RETAIL MARKETING OF SEAFOOD

1. R. Bulmer, President, CAFE

- groundfish fishery - consumption of groundfish in 1979 was 4.3 lb./person which declined to 4.1 lb./person in 1980
- block consumption decreased 15.3% in 1980, while groundfish fillets increased .6% and cod fillets increased .5%.
- Food Service utilizes 64% of groundfish
- with changing demographic patterns by 1990, 66% of households will consist of 1 or 2 people and 24% will consist of 1 person - this will have an effect on product presentation.

2. A. Benoff, Head of Seafood Dept., Giant Food Inc. Washington, D.C.

- Giant Food Inc. has a fresh seafood department much like a meat department in most grocery stores (they have a 4 day code for freshness).
- eventually everything will be centrally cut so that orders will be called in and seafood sent to stores.
- variety of product is important to this concept.
- most popular forms sold at present are filleted and dressed fish (50/50).
- there is 3½-4% wastage of food with this concept.

3. J. Powers, East Coast Fish Buyer, Safeway Stores Inc.

- Safeway also has a fish department with centralized procurement to ensure getting proper variety of product.
- they currently buy frozen product and are in the process of developing fresh sales, however this is a slow process because of distance to ship.
- the industry really needs to develop a self-contained refrigerated container to hold the fish.

4. P. Ginley, President, Nickerson Seafoods Inc.

- in the 1970's fish was "king", today it is chicken.

- opportunities for fish are at the retail level.
 - consumers of today are interested in lighter foods and diets, health and nutrition.
 - a market research study was done which found out that:
 1. there is a misconception about cooking fish i.e. housewife feels she is not able to cook it properly.
 2. fresh vs. frozen conflict exists.
 - fresh is a preconceived purchase and frozen is an impulse purchase.
 3. consumer feels that he/she gets better quality from a restaurant.
 4. little realization that fish can be baked and broiled as well as fried.
 5. preconception that cookbooks don't have good recipes.
 6. 43% of people in U.S. feel they should eat fish.
 7. public would rather order fish than prepare it at home.
 8. the main discovery in this study was that the industry really doesn't understand the consumer and that much more work has to be done in this area if sales are to be increased.
5. A. Arseneault, Director of Marketing, Quebec United Fishermen
- main issues are quality and value.
6. Comments from the Audience
- found consumption of breaded and battered fish products has decreased with an increase in consumption of chicken and rice.
 - increased usage of microwaves and their impact i.e. making traditional food convenient.
 - responsibility for educating the consumer, where does it lie?
 - potential market in hospitals.
 - need for improved merchandizing techniques.

B. SEAFOOD TRENDS IN THE FOOD SERVICE, RESTAURANT AND FAST FOOD SECTOR

1. K. Muenzmay, Dir. Purchasing, Red Lobster Inns of America

- main factor is diversification of product.

2. L. Leppink, Food & Beverage Buyer, Shoney's Inc.

Problems with Canadian industry-

1) quality softer, increased drip loss, bones and parasites, more ragged.

2) continuity of supply - there is none.

3) pricing - consistency and forward-pricing needed.
- peaks and valleys useless

3. J. Kraft, President, Quality Cod Products

- usually sells Cdn cod fillets but finds Canada not responsive enough to U.S. demands.

- Canada has to get away from blocks and salted fish; not really a long term market in this.

- feels quota disagreements only serve to give Canada poor publicity.

- pricing has to be gradually increased so that peaks and valleys can be avoided.

4. C. Davis, President, Fishery Products

- trend towards breakfast and dinner consumption increasing while lunches are decreasing.

- important factors regarding Canadian product:

1) perceived cost at consumer level.

2) taste, texture and quality - still no common yardstick.

3) continuity of supply.

4) nutritional appeal - untapped as yet.

5) new product development - 80's will see lightly breaded, sauced or natural.

6) market research - customer unknown.

7) merchandizing and promotion - still novices at this.

5. P. Blades, President, Continental Seafoods Ltd.

- what effect does packaging have on the F.S. sector?

Muenzmay - packaging has no real effect.

- quality is important as well as preservation properties.

- Canadian industry must deal on a 1 to 1 basis for requirements.

Kraft - cello-wrapping a problem as quite frequently embedded on the sides and ends of product.

6. Comments from the Audience

Ginley - since Canada can make a product like Iceland why shouldn't we get the price?

Kraft - Canada needs to improve quality and continuity of supply for the whole industry first.

Shoney's - continuity of supply primary and as well quality is still not consistent.

C. REQUIREMENTS AND NEEDS OF AMERICAN SEAFOOD PROCESSORS FROM CANADIAN SUPPLIERS

1. W. Diederich, Vice-President, Purchasing, Van De Kamp's Frozen Foods

- number 1 concern to obtain best quality they can.
- reliability and quality can't be compromised.
- another major concern is continuity of supply.

2. R. Clouston, President, Gorton Corporation

- at present U.S. market not growing and as well retail sales are not growing.
- need for quality competitive products.
- to sell more product, Canadians have to be innovative; have to offer customer better product at good value.
- need for improved productivity.

3. A. Moore, Director, Fish and Seafood Purchasing, Booth Fisheries

- look for quality and continuity.
- in most cases quality sells.
- fish has to compete with beef, lamb, poultry, and pork.
- need long term supply.
- want delivery 12 months a year.
- supply has to be smoothed out.
- any U.S. increased production will probably be put into the fresh market.

4. D. Lyons, Vice President, Sales, Caribou Fisheries Limited

- need for a quality product at competitive prices.

5. B. Whitman, Vice President, National Sea Products

- money required to promote fish.

6. Comments from the Audience

- would government help in arranging to inventory fish at peak periods help continuity

Clouston -

- Canadians should control their fishing practices not their plants.

SUMMARY OF PANEL DISCUSSIONS

R. Bulmer -

Retail Sector - trend towards fresh fish in stores, however problems in distribution.

FS Sector - growth area, however Canadians have to solve supply problems and get quality up.

Processing Sector -

- supply has to be leveled out.

- the U.S. is Canada's number 1 customer.

- they take 80+% of total groundfish
50+% of total fish

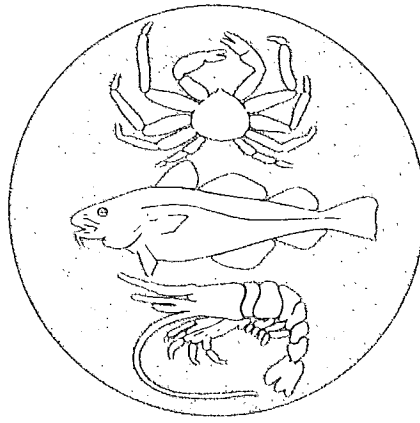
- have to make strides in quality issue at both boat and plant level.

- supply has to be coordinated.

- at present, industry looks first to resource management, then social welfare, then plant, then customers - this has to change, the market must be first

- events like the last two days are the first step in understanding the market.

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FISHERIES MARKET DEVELOPMENTS

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Industry, Trade
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Agriculture, Fisheries
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et Produits alimentaires

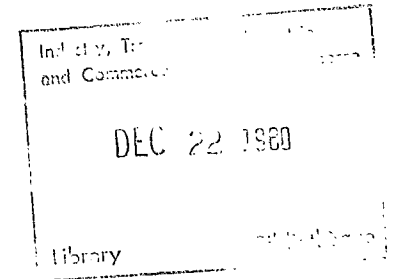
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FMD NO. 2

JAPANESE MARKET REPORT

DECEMBER 1980



The attached report was prepared by the Industry, Trade
and Commerce post in Tokyo.

Aussi disponible en français

SITUATION REPORT - FISH PRODUCTS

GENERAL: DURING FIRST 11 MONTHS OF 1980, JAPANESE FISHERY INDUSTRY HAS EXPERIENCED DIFFICULTIES ARISING FROM COMBINATION OF HIGH INVENTORIES (AT RELATIVELY HIGH VALUES), AFTER EFFECTS OF SPECULATIVE ACTIVITY IN 1979 (E.G. HERRING ROE), AND GENERALLY GOOD CATCHES. AS RESULT, MARKET PRICES HAVE BEEN SOFT AND ALL MAJOR FISHING COMPANIES AND WHOLESALERS HAVE REPORTED REDUCED EARNINGS. ALTHOUGH INVENTORIES OF MANY SPECIES HAVE NOW BEEN BROUGHT INTO LINE WITH DEMAND, FULL CORRECTION IS NOT EXPECTED UNTIL EARLY 1981.

SALMON: DOMESTIC CATCH OF SALMON IS REPORTED TO BE GOOD. HOKKAIDO RUN RECENTLY CONCLUDED WITH TOTAL CATCH ESTIMATED AT 47,000 METRIC TONNES, A DECREASE FROM RECORD 61,500 METRIC TONNES IN 1979 BUT EQUAL TO 1978 WHICH WAS SECOND HIGHEST. CATCH ON NORTHERN MAINLAND ALSO REPORTED AS GOOD. SEASON THERE WILL CONTINUE TO MID-JANUARY AND TOTAL CATCH EXPECTED TO EQUAL LAST YEAR'S RECORD OF 15,000 METRIC TONNES. QUALITY OF THIS YEAR'S CATCH IN HOKKAIDO IS REDUCED AS A RESULT OF CONCENTRATION IN LARGE SIZES (5 YEAR OLDS) WHICH ARE NOT APPROPRIATE FOR GIFT GIVING. AS A RESULT, MORE THAN AVERAGE QUANTITIES HAVE BEEN FROZEN AND CONSEQUENTLY SALTING OPERATIONS HAVE BEEN REDUCED. SUBSTANTIAL INVENTORIES OF IMPORTED SALMON, CARRIED OVER FROM 1979 (AND 1978), WERE REDUCED TO NORMAL LEVELS BY MID-SUMMER. AS A RESULT OF THIS WORK-DOWN OF STOCKS, GOOD DOMESTIC SUPPLIES, AND POOR CATCHES IN NORTH AMERICA, IMPORTS WERE NOT EXPECTED TO BE LARGE. HOWEVER, IMPORTS TOTALLED 36,000 METRIC TONNES BY END OF OCTOBER 1980 AND ARE EXPECTED TO REACH 40,000 METRIC TONNES BY YEAR END. (1979-58,000). MARKETING OF SALTED SALMON AVERAGE

200-250 METRIC TONNES/DAY DURING PEAK SEASON. SMALLER SIZE (3 KG) ARE CURRENTLY SELLING AT YEN 1500/KG, WHICH IS 10-15 PERCENT ABOVE 1979 LEVEL AND SUBSTANTIALLY HIGHER THAN JUNE PRICE OF YEN 1050. AS A RESULT, SALES ARE SOMEWHAT SLOW AND PRICE IS SOFTENING. CURRENT WHOLESALE PRICE OF IMPORTED FROZEN SOCKEYE IS YEN 1300-1400/KG FOR SEMI-DRESSED (HEAD-ON) AND YEN 1400-1450/KG FOR FULL DRESSED. PRICES ARE STEADY AND SALES RELATIVELY GOOD.

SALMON ROE: DOMESTIC SALMON ROE PRODUCTION IS APPROX. 3,000 METRIC TONNES AND IS ONLY AVAILABLE ON SEASONAL BASIS. IMPORTED SALMON ROE HAS BECOME A MAJOR ITEM IN JAPAN AND IS SOLD THROUGHOUT YEAR. IMPORTS JAN-OCT 1980 REACHED 7811 METRIC TONNES, APPROX. 1300 METRIC TONNES INCREASE OVER 1979 AND TOTAL 1980 IMPORTS SHOULD REACH RECORD 8,000 METRIC TONNES. SALES AT MAJOR WHOLESALE MARKETS ARE STEADY AND CURRENT PRICES ATTRACTIVE TO CONSUMERS. CURRENT PRICE OF NUMBER 1 GRADE CHUM SALMON ROE FROM ALASKA OR CANADA IS YEN 4100 TO YEN 4500 PER KG AT TOKYO CENTRAL WHOLESALE MARKET.

HERRING ROE: PRIOR TO PEAK OF SEASON, I.E. FROM JAN TO OCT'80, TRADE HAS WORKED TO RE-ESTABLISH COLLAPSED HERRING ROE MARKET. EXCESS INVENTORY TOTALLING 3500 METRIC TONNES HAS BEEN PRACTICALLY ELIMINATED. AS A RESULT OF REDUCED PRICES AND DECREASED SUPPLIES, SALES OF HERRING ROE HAVE RETURNED TO NORMAL PATTERN AND STEADY BUT GOOD SALES ARE PREDICTED. TOKYO CENTRAL WHOLESALE PRICES OF LARGE SIZE HERRING ROE, CURRENTLY YEN 7200-7400 PER KG, HAVE GRADUALLY INCREASED FROM YEN 6000 TO YEN 6500 IN SUMMER MONTHS. IMPORTS OF SALTED HERRING ROE IN 1980 REACHED 5,000 METRIC TONNES BY END OF OCTOBER. IMPORTS OF ROE

HERRING FROM ALASKA ARE APPROXIMATELY 20,000 METRIC TONNES, WHICH WOULD YIELD APPROXIMATELY 2000-2100 METRIC TONNES OF ROE. TOTAL SUPPLY IN 1980 THEREFORE ESTIMATED AT 10,000 METRIC TONNES (INCLUDING 3500 METRIC TONNES INVENTORY CARRIED OVER). MOST PRODUCTS OTHER THAN FULL SHAPED ROE HAVE BEEN SOLD AND TRADE ESTIMATES APPROXIMATELY 3,000 METRIC TONNES FULL SHAPE ROE AVAILABLE FOR NEW YEAR, AFTER RESERVING 1,000 METRIC TONNES FOR NOMINAL CARRY-OVER INTO 1981. STRENGTHENED RESTRICTIONS ON USAGE OF HYDROGEN PEROXIDE FOR BLEACHING ROE HAVE AFFECTED ALL PROCESSORS AND CAUSED UNCERTAINTY ABOUT CONSUMER ACCEPTANCE. SOME STORES CARRYING ONLY UNTREATED ROE. HOWEVER, PROCESSORS NOW CONFIDENT PRODUCTION CAN MEET ZERO RESIDUE SPECIFICATION ON FINISHED PRODUCTS, AND MOST ROE NOW BEING SOLD IN BLEACHED FORM.

HERRING ROE ON KELP: IMPORTS OF SALTED HERRING ROE SPAWN ON KELP FOR JAN-SEPT 1980 REACHED 518 METRIC TONNES; 214 METRIC TONNES FROM CANADA AND 301 METRIC TONNES FROM ALASKA. MARKET EXPERIENCING STEADY AND STRONG DEMAND FROM HERRING ROE TRADE AND CONSEQUENTLY OUTLOOK FOR THIS PRODUCT IS FAVOURABLE. NUMBER 1 GRADE CANADIAN PRODUCTS SELLING BETWEEN YEN 6500-7,000 PER KG AT OUTSIDE WHOLESALER TO HRI TRADE: AVERAGE IS YEN 6800.

HERRING: DUE TO IMPORT RESTRICTIONS (IMPORT QUOTA ALLOCATED ONLY TO PROCESSORS DURING FIRST HALF BY 1980) NO IMPORTED ROE OR FOOD HERRING MARKETED THROUGH COMMON CHANNELS OF DISTRIBUTION.

HERRING ENJOYS ONLY SEASONAL MARKET IN JAPAN WITH HOKKAIDO HERRING SELLING IN SPRING MONTHS AND HERRING CAUGHT IN EASTERN CHINA SEA SOLD IN FALL. BOTH FRESH AND FROZEN-ON-BOARD (DEFROSTED AND MARKETED AS FRESH) FROM LATTER AREA NOW SELLING VERY WELL IN LARGE CITIES WHOLESALE MARKETS. PRICES AVERAGE YEN 800/KG RANGING FROM SMALL SIZE AT YEN 300/KG TO LARGE SIZE IN EXCESS OF YEN 1,000/KG.

SQUID: HOKKAIDO SUMMER AND FALL SQUID FISHERIES (JIGGING) HAS ALREADY TERMINATED AFTER EXTRAORDINARY HIGH HARVESTS. LANDINGS OF COMMON SQUID FOR JAN-SEPT REACHED 197,000 METRIC TONNES (122,000 METRIC TONNES OF FRESH AND 75,000 METRIC TONNES OF FROZEN), MORE THAN 60 PERCENT ABOVE SAME PERIOD 1979. AS COMMON SQUID CATCH CONTINUES THROUGH DECEMBER, TOTAL COMMON CATCH EXPECTED TO REACH AND MAY EXCEED 300,000 METRIC TONNES BY END OF YEAR. THIS REPRESENTS INCREASE OF OVER 100,000 METRIC TONNES FROM 1979 CATCH (176,000 METRIC TONNES).

TOTAL SUPPLY NOW ESTIMATED AT MINIMUM OF 506,500 METRIC TONNES, COMPRISING FOLLOWING DOMESTIC AND CONTRACTED IMPORTS. (NO CUTTLEFISH INCLUDED).

DOMESTIC CATCH: 486,000 METRIC TONNES

COMMON SQUID: 300,000 METRIC TONNES

RED SQUID: 100,000 METRIC TONNES

NEW ZEALAND JUGGED SQUID: 25,000 METRIC TONNES

AUSTRALIA TEST JUGGING: 7,500 METRIC TONNES

NEW ZEALAND TRAWL: 14,400 METRIC TONNES

USA TRAWL: 3,500 METRIC TONNES

CDA TRAWL: 17,000 METRIC TONNES

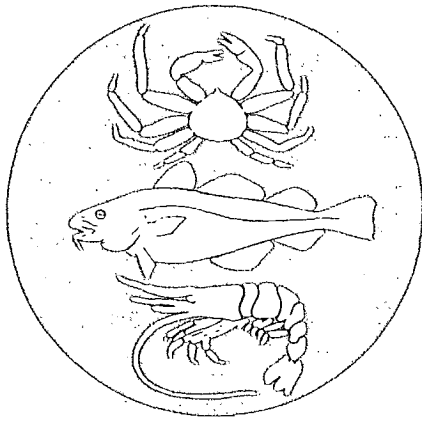
ARGENTINA TRAWL: 7,000 METRIC TONNES
N.S. JUGGED (JOINT VENTURE): 12,000 METRIC TONNES
IMPORTS (1980 CONTRACTS): 20,000 METRIC TONNES
N.Z. TRAWL (JOINT VENTURE): 10,000 METRIC TONNES
ARGENTINA: 300 METRIC TONNES
CDN AND USA: 5,000 METRIC TONNES
MEXICO (RED SQUID JV): 2,000 METRIC TONNES
OTHERS (UNKNOWN): 3,000 METRIC TONNES

APPROX 400 METRIC TONNES OUT OF (6,000 METRIC TONNES) INVENTORY OF NEW ZEALAND SQUID WAS RECENTLY PLACED IN MARKET BUT SALES ARE VERY SLOW. PRICES: AS A RESULT OF HEAVY MARKETING OF FRESH COMMON SQUID, PRICES DECLINED SHARPLY AS SEASON PROGRESSED AND TOUCHED LEVELS AS LOW AS 40 PERCENT TO 50 PERCENT OF PREVIOUS YEAR. LANDED PRICES AT MAJOR PORTS HAVE STRENGTHENED MODERATELY SINCE AUGUST (YEN 250/KG) TO YEN 315 IN SEPT (LARGE SIZE) AND CURRENTLY ARE QUOTED AT 360-370. FROZEN SQUID SOLD FOR 242 IN AUGUST, 280 IN SEPT AND CURRENTLY 340-350. PRICE OF NEW ZEALAND SQUID AND CANADIAN ILLEX IS STILL VERY LOW DUE TO POOR DEMAND. ALL LARGE COMPANIES IN SQUID TRADE ARE HOLDING STOCKS IN ANTICIPATION OF PRICE INCREASES. CURRENT WHOLESALE PRICES (MOSTLY TO PROCESSORS) OF FROZEN CANADIAN ILLEX IS YEN 170-180/KG FOR ROUND, AND LITTLE OVER YEN 300/KG FOR TUBE. OUTLOOK: CURRENTLY NEW ZEALAND SQUID SEASON HAS COMMENCED, BUT AS RESULT OF ABOVE SITUATION, FULL COMPLEMENT OF 98 JIGGERS (G/G BASIS) AND 52 JIGGERS (JOINT) SQUID FISHERIES IS NOT TO BE EXPECTED. TRADE PREDICTS APPROXIMATELY 80 JIGGERS FOR G/G BASIS AND 50 JIGGERS ON JOINT VENTURE COULD BE FISHING OF NEW ZEALAND. AMPLE SUPPLIES AND LOW PRICES

OF COMMON SQUID DISCOURAGED CATCHES OF OTHER SPECIES AND CONSEQUENTLY WAREHOUSE STOCKS ARE NOT LARGE. ON NOVEMBER 28, JAPANESE GOVERNMENT ANNOUNCED IMPORT QUOTA OF 18,000 METRIC TONNES FOR SECOND HALF FISCAL YEAR 1980. OFFICIALS EXPECT THAT CANADA AND SOUTH KOREA MAY FILL ENTIRE TONNAGE. DESPITE QUOTA, SOME CONCERN IS BEING EXPRESSED WITHIN TRADE ABOUT POSSIBLE SUPPLY SHORTAGE PRIOR TO COMMENCEMENT OF DOMESTIC CATCH IN 1981.

SABLEFISH (BLACK COD): IMPORTS OF BLACK COD ARE NOT ACTIVE AND ONLY OCCUR DURING OFF SEASON WHEN DOMESTIC MARKET BECOMES SHORT. BLACK COD NOW SELLING AT TOKYO CENTRAL MARKET IS ALASKAN ORIGIN WHICH HAS BEEN CAUGHT BY JAPANESE VESSELS AND FROZEN ON BOARD. PRICE IS VERY STABLE: CURRENTLY SELLING AT YEN 680 TO YEN 870/KG FOR FULL DRESSED: AND YEN 750/KG FOR FROZEN FILLET (STEAK).

FISHERIES MARKET DEVELOPMENTS



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FMD NO. 1
MARCH 1980

JAPANESE PRESS REPORTS ON FISHERIES IMPORTS

/translation of an article, Nihon Keizai Shinbun, Tokyo,
February 20, 1980/

**SWELLING IMPORTS OF MARINE PRODUCTS: RECORD HIGH LAST YEAR
IN BOTH VOLUME AND VALUE; MOUNTAINOUS STOCKS CAUSED BY
SPECULATIVE PURCHASES**

Japan's imports of marine products in 1979, as compiled by the Japan Marine Products Import Association, have reached 1,150,000 tons worth \$4.2 billion, a record high in both volume and value.

Causes for the increased imports were varied, such as speculative purchases of herring roe, salmon and trout, competition for the share of shrimps and squids among trading firms, etc.

Amid growing concern over credit in the country, the market has fallen into relative stagnation and the imported marine products are heaping up in stock with no buyers. "There is too much, as a result of importing more than required." This is a common reply from trading firms and others.

The reason for the import increase of 14% by volume was that the price of fish in the previous year was comparatively high and "the level of the stock was still low," stated Senior Managing Director Takane of Chuo Gyorui.

Particularly because the catches of salmon, trout and squids had been forecast to be poor, trading firms and fishery companies when rushing for overseas purchases and at the strength of a high yen, "they thronged for speculative purchases with an eye to profit margins out of the exchange rate" (Mitsui Bussan). It may be said that their misspeculation on exchange rate has ironically resulted in more increases in imports than expected.

Some species were imported massively. The imports of 158,000 tons of frozen shrimps, valued at \$1.4 billion, exceeded other items. Imports of squids were 155,000 tons, worth \$0.34 billion. The imports of bonito and tuna, ranking third, were 121,000 tons worth \$0.3 billion. The imports of salmon and trout amounted to 54,000 tons worth \$0.27 billion and those of herring roe totaled as much as \$0.24 billion for only 7,700 tons. The import volume of smelts increased five-fold in the single year and that of dressed tuna swelled four-fold.

The majority of these imported items still lie in freezing warehouses. Concerned traders point out: "Their import cost was so high, consumers won't buy even though we try to sell them".

The average unit price of the marine products imported last year was \$3,210 per ton, up 21 per cent over that of the preceding year. Particularly because domestic catches of salmon last year were abundant and much was available in domestic market, imported salmon apparently lost the chance to go into market.

Trading firms, loaded with massive stocks, are being compelled to sell at a discount and some say that "clearing out the stocks will require until summer at the least" (Marine Division Director Haramima of C. Itoh).

In fact, some of the trading firms and fishery companies are moving toward gradual reduction of their overseas joint ventures. An executive in charge of the fishery in a trading firm said that they are driven to market directly to the U.S. and European countries certain fish that are canned overseas after being caught.

/translation of an article, Nihon Keizai Shinbun, Tokyo,
February 25, 1980/

MARUBENI TO MARKET CANNED SALMON IN U.S. AND CANADA BY
PROCESSING SALMON BOUGHT THIS YEAR

Marubeni has decided that it will export to the U.S., Canadian and European markets all the salmon it will buy and can in the U.S. and Canada rather than bring them to Japanese market.

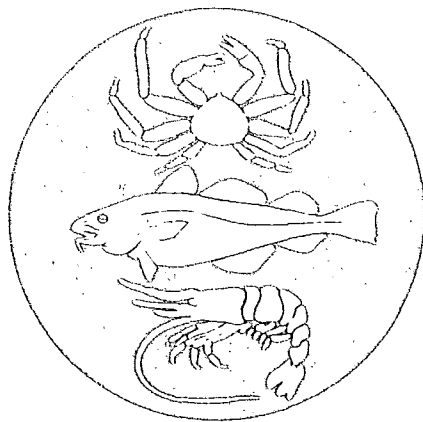
As a result of the competition among trading firms and fishery companies in the purchase of salmonids in the U.S. and Canada, their domestic stocks carry over from last year have totaled about 78,000 tons. So, Marubeni judged that it would not pay if the salmon acquired overseas were brought into Japanese market.

The imports of salmon and trout last year were estimated at about 50,000 tons, of which about 10 per cent (5,000 tons) was imported by Marubeni, mostly from the coast of Alaska, the U.S. and the Pacific coast of Canada. Almost the whole of the salmon and trout bought there was imported as "aramaki" (newly salted) into Japanese market.

Japanese firms' purchase of fish in the U.S. and Canada has been intensifying competition as the quota for Japanese fishing boats is being cut down at Japan-Soviet negotiations. A market phenomenon from last year was the appearance of processing vessels at sea buying fish directly from foreign fishing boats.

In view of the fact that it has spent significant funds to built up purchase routes in the U.S. and Canada, as well as other consideration for the future, Marubeni says it cannot put a sudden halt to such purchases for this year but will continue purchases in limited quantities.

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FISHERIES MARKET DEVELOPMENTS



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FMD No. 1

JANUARY, 1979

LABELLING OF FROZEN FISH IN ITALY

All companies shipping frozen fish to Italy should avoid the use of the term QUICK FROZEN on their packaging or documentation.

This term has a special meaning under Italian law and, although the law applies only to consumer packages, a shipment of Canadian fish in 10 kg bulk packages has been refused entry by the Italian inspectors.

Our Trade Commissioner in Rome is attempting to have this particular shipment released but obviously it would be better to avoid the use of the term QUICK FROZEN altogether and label product simply as FROZEN regardless of pack size.

As a further precaution, fac-similies of labels and packaging can be submitted to Italian authorities by you or your customer before shipment.

FMD No. 1

JANVIER 1979

ETIQUETAGE DU POISSON CONGELE EXPEDIE EN ITALIE

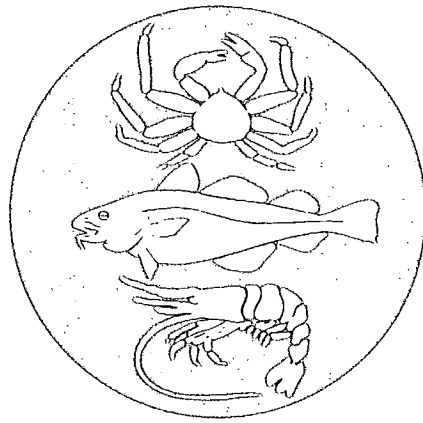
Toutes les compagnies qui expédient du poisson congelé en Italie doivent éviter d'utiliser le term CONGELATION RAPIDE sur leur emballage ou leurs documents.

En Italie, ce terme a, en vertu de la loi, une signification spéciale et bien que la loi ne s'applique qu'aux emballages destinés aux consommateurs, les inspecteurs italiens ont refusé l'entrée d'un envoi de poisson canadien emballé en blocs de 10 kilos.

Notre délégué commercial à Rome est en train d'essayer de faire approuver cet envoi particulier mais, de toute évidence, il vaut mieux éviter complètement d'employer le terme CONGELATION RAPIDE et indiquer simplement CONGELE sur l'étiquette du produit, quel que soit le volume de l'emballage.

A titre de précaution supplémentaire, nous vous suggérons de soumettre vous-même ou par l'intermédiaire de votre client des fac-similés des étiquettes et de l'emballage aux autorités italiennes avant l'expédition.

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FISHERIES MARKET DEVELOPMENTS



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FISHERIES MARKET PROFILE - SUMMARY

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FISHERIES MARKET PROFILE

DENMARK

SUMMARY

Denmark became a member of the EEC on January 1, 1973, at which time participation in EFTA ceased. Traditionally a fishing nation, 15,100 persons of a total population of 5.1 million were engaged in the industry during 1977. Danish landings are the largest in the EEC by volume, although surpassed in value by those of Great Britain and France.

Denmark is also one of the world's leading fish consuming nations with an average of 19 kg per person in 1977 compared to 7.5 kg in Canada. The Danish market is conservative in its taste for fisheries products and is very quality conscious. Large but declining quantities of fresh fish are sold as well as a considerable volume of prepared/preserved fisheries products. The main species consumed by the average Danish household include herring, mackerel, eel, plaice, cod, salmon and shellfish.

Denmark is a major fisheries trading nation, importing mainly from Greenland, Faeroe Islands, Sweden, Norway, Federal Republic of Germany (FRG) and Canada. Exports are destined mostly to FRG, Great Britain, Sweden, France and the U.S.A.

The Danish trade prefers the use of "cash against documents" as a method of payment for fish imports, although the use of "letters of credit" is common for the first dealings between new business associates.

In recent years, fish stocks have declined drastically in many West European waters, the major areas of supply for Danish fishermen. This affords Canadian exporters an opportunity to increase the share of the Danish market and of other foreign markets previously supplied by Denmark.

FISHERIES MARKET PROFILE

DENMARK

LANDINGS
1977

- 1,733,539 tons by Danish fishermen.
 - 127,405 tons by foreign boats.
 - 82.5% of Danish catch (1,430,170 tons to industrial/
non-human consumption.
 - 34.2% of foreign catch (43,573 tons) to industrial/
non-human consumption.
- | | | | | |
|-------------|---|--------------------|-----|-----------------------------|
| Cod | - | 149,834 tons | 98% | by <u>Danish</u> fishermen. |
| Plaice | - | 51,500 tons | 91% | " " " |
| Herring | - | 74,531 tons | 51% | " " " |
| Saithe) | | | | |
| Mackerel) | - | 274,024 tons | 79% | " " " |
| Haddock) | | | | |
| Sandeel | - | 450,000 tons (est) |) | |
| Norway pout | - | 300,000 tons (est) |) | non-human |
| Sprats | - | -- |) | consumption |

The exceedingly large Danish fishery for species earmarked for industrial uses (fishmeal/animal feed) has grown due to the following factors:

- abundance of species suitable for industrial uses of which sandeel, Norway pout and sprats are the most plentiful.
- reduction of volume of species for human consumption due to depletion of stocks, restrictive quotas and closure of fishing zones.
- difficulties in manning fishing boats, industrial fishing requiring smaller crews.
- smaller investments in equipment for industrial fisheries versus fishing for species destined for human consumption.

...

- limited demand for species, i.e. whiting and sprats, normally earmarked for human consumption.
- diversion of poor quality landings of species normally directed for human consumption, i.e. cod, plaice, herring, saithe, mackerel and haddock towards industrial processing.

Two-thirds of all Danish fishermen ply their trade in the Kattegat, Skagerak, Baltic, Belt and North Seas. The majority of boats are in the less than 50 gross ton category, although some larger vessels may have a gross tonnage between 500-1000 tons.

DENMARK

*

PRODUCTION
1977

- 443,120 tons of fish and fisheries products including:
 - 306,968 tons of fishmeal
 - 120,159 tons of frozen, fresh and chilled fish
 - 10,248 tons of salted, dried or cured fish
- 95,967 tons of fish oil
- 23,058 tons of canned prepared fish
- 16,025 tons of prepared fish not canned
- 11,475 tons of shellfish
- 15,660 tons of fish roes and other fish products
- 9,241 tons of fish solubles
- 33,620 tons of fish ensilage

*Figures relate to production in plants having 20 or more employees and include processing of imported fish.

DISTRIBUTION

- all sales of fresh fish to processors are conducted through auctions ensuring the best possible price to fishermen but preventing processors from entering into long-term supply contracts.
- two main buying groups, i.e. A/S Unil and the United Danish Cooperatives (FDB) supply the retail trade including all major supermarkets with imported fishery products.

DENMARK

IMPORTS
1977

- total 273,112 tons valued at \$208 million
- Greenland (20%), Faeroe Islands (19%), Sweden (17%), Norway (10%), FRG (6%), Canada (4%) and Iceland (4%) accounted for 80% of the value of Danish imports.
- The main items imported from Canada included:
 - Frozen salmon - 1,483 tons valued at \$6.6 million
(main competitors:
 - Greenland - 1310 tons of Atlantic Salmon
 - U.S.A. - 470 tons of Pacific Salmon)
 - Frozen herring - 387 tons
(main competitor: FRG - 178 tons)
 - Peeled frozen shrimp - 35.2 tons valued at \$238,000
(main competitors:
 - Greenland, Norway, U.S.A., Chile, Iceland and the Faeroe Islands)
- total Danish shrimp imports -4,739 tons
- Fresh, chilled & frozen lobster (not hermitically sealed) 37.7 tons valued at \$192,000
Canada supplied total Danish imports of this item
- Prepared crab (not hermitically sealed)
21 tons for \$178,000
(main competitor - U.S.A. - 11.8 tons)
- Canned salmon - 32.4 tons valued at \$125,000
(main competitors: USSR - 44.7 tons; Japan - 12.4 tons)
- Frozen eels - 22 tons valued at \$83,000

EXPORTS
1977

- total 634,538 tons
- West Germany, Great Britain, Sweden, France and the U.S.A. were the main markets of destination
- the main exported items were:
 - fish meal - 263,824 tons valued at \$150.8 million
(main buyers: the U.K. - 73,000 tons
Switzerland - 27,000 tons as well as
Holland, FRG, Poland & Hungary)
 - frozen cod fillets - 30,355 tons valued at \$70 million
(main buyers: - the U.S.A. - 19,600 tons
- Sweden - 6,424 tons)
 - fresh & chilled cut herring - 28,632 tons for \$27.8 million
 - fresh & chilled herring - 17,435 tons for \$14.5 million
(main buyer - FRG - 86% of total cut herring
- 65% of total herring)
 - frozen herring & cut herring - 11,258.4 tons
(main buyers: - FRG - 3,225 tons in total
- Holland - 4,810 tons uncut herring)
 - frozen plaice - 8,845 tons
(main buyers: - FRG, GDR, the U.K., Holland
accounted for 7,973 tons)
 - frozen mackerel - 10,538 tons for \$6.1 million
(main buyers: - FRG and GDR)
 - fresh, frozen & chilled fish - \$433.4 million
 - prepared/processed fish - \$126.1 million
 - fish oil - \$1.6 million

DENMARK

HERRING

- Danish consumers generally prefer herring 4-12 per kg, with a high fat content of 10-20%
- Denmark normally imports frozen, vinegar-cured and salt/sugar-cured herring from Canada. Importers are said to prefer spiced, cured or frozen fillets rather than round.
- the Danish market being very quality conscious prefers unbruised and undamaged herring. Danish experts with knowledge of Canadian fisheries feel that consistent quality will not likely be achieved so long as fishermen are paid on the basis of volume alone rather than on quality as well. Reports have also been received on inconsistent sizes of fish in Canadian shipments or that sizes were not as requested or according to terms of contracts.

It is therefore recommended that Canadian suppliers up-grade the quality of herring shipments to Denmark and increase their efforts in supplying the sizes requested if they wish to remain a major factor on the Danish market when increased landings occur in European waters.

SALMON

- although the Danish market is said to prefer Atlantic/Baltic salmon, Canadian and U.S. Pacific salmon account for 80% of consumption due to the price of the former. The market is expected to remain firm for frozen as well as canned Canadian salmon.

DENMARK

REGULATIONS - Labelling regulations for frozen fish require that packages show:

- country of production
 - name and address of Danish importer or his code number
 - name of product
 - that product is frozen and is to be stored below 0°C
 - net weight in frozen state
 - percentage of various products if the items are a blend or mixture
 - a listing of additives
- Labelling regulations for canned fish require that packages show:
- country of origin
 - name of product
 - net drained weight
 - a listing of additives
 - storage instructions for semi-preserves
- Customs duties for selected items:
- frozen salmon, herring, mackerel* - 0%
(0301 Alb) (0301 B2a/b) (03-01MI (Feb 15 - June 15)
 - frozen eels - 5% (0301 AII)
 - herring fillets, salted or spice-cured - 20% (16-04 CII)
for further processing - 0% (0302 AII d-0302 AI a-301 BIIa/b)
 - shrimp - 20% (16-05B)
for further processing - 10% (ex 1605 B)
 - canned salmon - 7% (1604 B)
 - canned lobster - 20% (1605-B)
- An internal value added tax levied on virtually all goods and services amounts to 20.25%
- Industrial products are free of quota restriction on importation.

Statistics Sources: Danish Government publications unless otherwise noted.

NOTE: Labelling regulations and customs tariffs are subject to change therefore it is recommended that both be verified through the Canadian Trade Commissioner in Copenhagen.

* Mackerel from June 16 - Feb 14 - 20%

CANADIAN EXPORTS - DENMARK

	1976		1977		1977		Jan.-June, 1978	
	Vol. tonne	Val. \$,000	Vol. tonne	Val. \$,000	Vol. tonne	Val. \$,000	Vol. tonne	Val. \$,000
Salmon, spring, fresh whole dressed	-	-	9	48	-	-	-	-
Salmon, fresh, whole or dressed nes	-	-	5	14	-	-	-	-
Salmon, Atlantic frozen whole dressed	10	24	38	238	1	5	1	5
Salmon, chum, frozen whole dressed	557	2,011	738	2,782	123	512	123	512
Salmon, coho, frozen, whole dressed	38	130	5	13	-	-	-	-
Salmon, spring, frozen whole dressed	26	100	21	36	1	4	1	4
Salmon, frozen, whole or dressed nes	172	458	290	788	113	329	113	329
fish, frozen, whole dressed nes	-	-	21	72	-	-	-	-
Herring fillets frozen	1	-	324	270	207	280	207	280
Herring, frozen, whole or dressed	-	-	-	-	654	290	654	290
Herring, whole, dressed pickled nes	568	125	-	-	23	47	23	47
Herring fillets, vinegar-cured	-	-	-	-	77	77	77	77
Herring fillets, pickled nes	37	23	-	-	-	-	-	-
Salmon, coho, canned	2	8	1	7	-	-	-	-
Salmon, pink, canned	20	68	26	90	13	46	13	46
Salmon, sockeye, canned	.5	3	1	7	1	2	1	2
Salmon, canned nes	1	4	7	24	-	-	-	-

Source: Statistics Canada

	1976		1977		Jan.-June, 1978	
	Vol. tonne	Val. \$,000	Vol. tonne	Val. \$,000	Vol. tonne	Val. \$,000
Fish & Fish Products, canned nes	18	40	-	-	-	-
Crabs, fresh or frozen	4	25	20	163	14	114
Lobster in shell, fresh or frozen	4	28	15	72	12	85
Lobster meat, frozen incl. boiled	3	22	4	29		
Scallops frozen	-	-	2	9		
Shrimps and pawns, fresh or frozen	6	17	-	-		
Crabs, canned	9	73	6	66	3	31
Lobster and products, canned	1	23	1	17	2	26
TOTAL	1476.5	3182	1534	4745	1244	1848

Source: Statistics Canada



FISHERIES MARKET DEVELOPMENTS



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Industry, Trade
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August 1977

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HERRING MARKET DEVELOPMENTS

With the closing of the North Sea herring fishery, prices for herring and herring fillets on the European market continued firm. It should be noted that prices quoted in Canadian dollars reflect the changes in exchange rate as well as real market changes.

Latest Hamburg C.I.F. prices are:

Frozen round herring, 3 to 5 fish per kilo
(suitable for smoking) \$0.37/lb.; 5-7 fish
per kilo \$0.21/lb.

Frozen butterfly fillets - large \$0.44
- medium \$0.42
- small \$0.41

Some sales have been reported recently as high as \$0.48 for large fillets. This price also holds for United Kingdom imports which are beginning to show there as domestic landings drop below consumption rate.

The North Sea ban is causing considerable dissatisfaction and concern in Denmark where herring is a dietary staple and the herring fishery a major industry. Danish estimates are that if, as expected, the North Sea ban is extended to the end of 1977, it will cost them 1000 to 5000 jobs and an income loss of about \$1.5 million.

E.E.C. tariffs on herring for further processing have been suspended to improve the supply situation. Even before the North Sea ban, Denmark annually imported 3,500 metric tons of herring from outside the E.E.C. and, during the first five months of 1977, Canada shipped 660 metric tons of frozen and pickled herring fillets and whole dressed pickled herring to Denmark. This compares with only 24 cwt. of frozen fillets in all of 1976.

French herring consumption is estimated to be 18,000 metric tons of which 8,000 tons are imported mostly as fresh, refrigerated or frozen. Of the 18,000 tons, 6,300 tons are sold fresh and 700 tons salted and marinated. The remainder is smoked fillets, kippers or bouffi (round). Limited shelf life precludes Canadian surface shipment of smoked herring except in frozen form, which in turn has merchandizing problems in the store.

Complaints have been received through our Trade Commissioners in Europe of Canadian herring shipments whose certificates did not include all of the information required by the importing country's laws. Date of freezing information is a particular problem in France where our Trade Commissioners have had to obtain special concessions to prevent the embargo of shipments lacking this information. This type of intervention cannot be relied upon on a continuing basis.

Current French regulations were attached to the Fisheries Market Developments newsletter of February 15, 1977, additional copies of which are available on request from: Fisheries and Fish Products Division, Agriculture, Fisheries and Food Products Branch (49), Industry, Trade and Commerce, Ottawa, Ontario, K1A 0H5.

FISHING, FISH CULTIVATION AND THE USE OF FISH IN FINLAND

(One Finmark = Cdn.\$0.26)

The catch of 1975 was 113,737 tons. The value of the catch estimated according to consumer prices was Fmks 206.1 million. 86,726 tons of the catch came from the sea, and the rest - 27,011 tons - from the lakes. The value of the sea catch was Fmks 99.1 million and that of the lake catch Fmks 107.0 million. 93 per cent of the sea catch came through professional fishing, whereas on the lakes only 21 per cent was caught by professional fishermen. The main part (79%) of the lake catch was brought in through the efforts of non-professional fishers.

Economically the most significant species was Baltic herring, the catch of which was 69,581 tons. The value of this catch was Fmks 42.0 million. Pike was caught 7,886 tons (worth Fmks 39.8 million), vendace 6,360 tons (Fmks 21.9 million), whitefish 3,619 tons (Fmks 18.8 million) and salmon 768 tons (Fmks 16.1 million).

Fish cultivation plants and net basins in the sea produced in addition to the above-mentioned 1,800 tons of rainbow trout (worth Fmks 18.0 million). Thus the total production in 1975 was 115,537 tons worth Fmks 224.1 million.

The 100 fish cultivation plants produced 66,000 salmon and 1,100,000 trout fingerlings in 1975. The total value of the fingerlings was Fmks 2.9 million. In the 300 natural basins covering some 2,000 hectares approximately 15 million one summer old whitefish fingerlings were produced for distribution.

There were some 10,000 professional fishermen in Finland in 1975 getting the entire or the main part of their livelihood out of fishing. The number of households having paid the state fishing fee was 446,054. The total number of people engaged in fishing either professionally or non-professionally is estimated to 2 millions.

According to customs statistics, 133,344 tons of fish and fish products were imported, of which amount 43,225 tons was fish meal, 52,757 tons fish waste and 15,962 tons to be used as feed. Altogether 111,944 tons of fish and fish products were imported as feed. Converted into fresh fish, the fish meal corresponded to 216,125 tons. Thus the amount of fish imported as feed would correspond to 284,844 tons of fresh fish.

Twenty thousand tons of fish and fish products were imported for human consumption, 6,735 tons of this were fillets, 5,396 tons herring and 4,478 tons preserves and other fish products. Also crayfish and shellfish are included in the fish products, their share being, however, quite small.

Customs statistics indicate that 471 tons of fish were exported in 1975. Exports, however, included fish products (tunafish, herring and chatka) which are not of Finnish origin.

According to the above-mentioned figures, 246,610 tons of fish and fish products were consumed in Finland in 1975. This amount corresponds to 419,511 tons of fresh fish. For human consumption 53,000 tons out of domestic production was used fresh, 3,500 tons as preserves, altogether corresponding to 81,737 tons of fresh fish. Thus an annual 22 kilograms per capita was consumed. In some other countries the corresponding figures were as follows:

	<u>kgs/year</u>		<u>kgs/year</u>
Hungary	4.2	France	20.0
F.R. Germany	11.0	Sweden	23.5
Italy	12.2	U.S.S.R.	26.6
U.S.A.	12.7	Denmark	31.9
Poland	14.3	Norway	appr. 45.0
Canada	6.0	Iceland	" 105.0
U.K.	17.1		

Thirty-two thousand tons of domestic products were used as animal feed (1975), and 284,844 tons of imported products both indicated in fresh fish figures, the total reaching 316,844 tons. The biggest consumers of fish feed are furred animals, hens and pigs. Thirty-one thousand tons of domestic Baltic herring were used as mink feed and 1,000 tons for cultivation (mainly rainbow trout).

HAKE REQUIREMENT OF FRANCE

French hake requirements amount to about 5,000 tons per year. Product forms include dressed headless in sizes 2-3 lbs., 3-4 lbs., and 4 lbs. and up; frozen blocks; frozen skinless fillets; and frozen interleaf skinless fillets current price for dressed headless is about \$0.45 per lb. c.i.f.

HERRING SITUATION IN DENMARK - AUGUST 27, 1977

Recent prices ex vessel at auction are for size two (8-12 herring per kilo) 20-25 cents per lb; for size one (5-8 herring per kilo) 45-57 cents per lb. Obviously demand is great under present conditions and buyers admit that it is a seller's market.

HERRING SITUATION IN NETHERLANDS - AUGUST 25, 1977

Processors and the trade in the Netherlands are interested in fresh caught round herring. The price of about \$850 per ton is reported to be quite acceptable if fat content is between 14-18 percent and sizes 3-5 or 4-6 per kilo.

NOTE

Please be reminded of the Food Promotions and Sales Meetings at Philadelphia, September 20, and Buffalo, September 22, 1977.

INDONESIAN FISHERY IMPORTS AND EXPORTS AND A REVIEW
OF THE DOMESTIC FISHERY SECTOR

Indonesia was short of foreign currency over the last two years as a result of the financial crisis associated with the state oil company, Pertamina. Nevertheless, the importation of fishery products was not adversely affected since this was only a small portion of the total import value. In fact, the import volume of fishery products increased by approximately 230% from about 6,700 metric tons in 1975 to 22,000 metric tons in 1976. The import value of fishery products advanced even more rapidly; from U.S. \$2.3 million in 1975 to U.S. \$10 million in 1976. Yet its percentage value as compared to the country's total import value was not significant, i.e. 0.04% in 1975 to 0.17% in 1976. On the fishery export side, the volume increased by 30% in 1976 from the previous year while its value has increased by approximately 50%.

Local Fisheries Production

Local fisheries are divided into two main categories, i.e. Marine Fisheries and Inland Fisheries, each contributing about 72% and 28% respectively in 1976. This comparison was about 65% to 35% in 1975. The reason for the higher increase in marine fisheries production was primarily due to the application of modern fishing technology particularly by large foreign fishing companies over the last 10 years. This is also reflected in the number of power boats used in marine fishery which has increased by 130% over the last 7 years. Inland fisheries, which primarily involve small native fishermen are still using traditional catching methods.

Local Fisheries Species

Marine fisheries comprise some 65 species, classified into 5 different groups, i.e. fish - 45 species (92%), crustaceans - 7 species (5.65%), molluscs - 8 species (0.99%), other aquatic animals - 4 species (0.22%) and aquatic plants - 1 species (0.32%).

Inland open water fisheries comprise 25 species, classified into 4 different groups i.e. fish - 14 species (97%), crustaceans - 4 species (2.68%), mulluscs - 3 species (0.16%) and other aquatic animals - 4 species (0.16%).

Major species among others are scads, trevallies, tread fins, anchovies, fringescale sardinella, Indian oil sardinella, wolf-herring, Indo-Pacific mackerels, narrow-barred Spanish mackerel, skipjack tuna, eastern little tunas, banana prawn, altogether constituted about 50% of the total species production. Canadian major species are not found here in abundance except halibut, herring and mackerel of which the total is about 14% of the marine fishery production.

Import/Export of Fishery Products

Indonesia is not a net importing country of fishery products, but is one of the largest fishery exporters in this part of the world. The country's export value of fishery products is approximately 1.300% of the import value in similar products for 1976.

Although import and export of fishery products are both increasing in volume as well as in value, the percentage of the export increase is likely more rapid and constant. Import sources are mainly Japan, Australia, Taiwan and Singapore. At least 80% of fishery imports are in cans (sardines and salmon).

Countries of export destination are primarily Japan, Hong Kong, U.S.A. and the Netherlands. Main export species are shrimps (frozen), tuna, skipjack, crabs, lobster and frogs-legs. Indonesian major fishery imports from Canada are salmon and a few other preserved fishery products, while Canadian main imports from Indonesia are frogs-legs and shrimps.

DOMESTIC FISHERY

Catch Quotas

Basically, there is no catch quota although large foreign fishery companies who normally use modern catching methods are not allowed to exploit the area where small native fishermen are traditionally fishing.

Licenses

All fishing companies, except small native fishermen, are obliged to have catching licenses prior to operation. The license normally indicates catching areas as well as the validity period of the license.

Financial Assistance

Fishing is one of the most important agricultural sectors in this area on which the lives of some 7 million people are dependent. The importance of this sector is reflected in the budget of the Directorate General of Fisheries which is increasing rapidly from year to year. For the fiscal year 1976/77 the government has allocated about U.S. \$12 million for developing fishery projects apart from those used in setting up new fishery companies either financed under International Financial Organizations or by the State Budget. Financial assistance is primarily extended to the small fishermen through the CHEAP CREDIT SCHEME in order to enable them to purchase modern fishing inputs.

FORECAST OF MARKET PROSPECTS

Indonesia, as one of the world's largest maritime countries, is fully aware of its fishery potential. The country's annual fishery potential is estimated at 4,180,000 metric tons from open sea operation, 916,000 metric tons from aqua culture in brackish water and 801,500 metric tons from aqua culture in fresh water. Current production is about 25% of the total fishery potential. In addition, Indonesia is also capable of producing 30 million metric tons/year of ornamental fish. Her fishery export volume is approximately 3.6% of the total production, Import value is about 8% of the total export of fishery products.

Canada - Indonesia fishery trade is constantly growing but the trade balance is in favour of Indonesia. The prospect for Canadian fishery export to Indonesia is limited although it may proceed at a slow rate.

Major handicaps in expanding the market in this area are the following:

- Prepared fishery products (canned) are not in preference in this area.
- Consequently, importation is related only to the requirement of the expatriate groups.

- Import duty is steep, ranging from 60-80%, in addition to 10-20% sales tax, so as not to compete with the locally produced fishery products.
- Per capita income is extremely low (approximately U.S. \$180/year) therefore imported fishery product prices are consequently beyond the people's purchasing capacity.
- Foreign fishery investors are obliged to integrate their plants from catching to processing and marketing which may sooner or later substitute importation of prepared fishery products. In addition, large foreign fishery companies are also obliged to accept the catch of the local fishermen.
- Registration fee prior to importation of fishery products is extremely high, i.e. U.S. \$250 for each label of product. Usually this will discourage small local firms from importation as it may not cover their sales expenses. In this context, the exporters are normally claimed to pay the fee but again exporters are not prepared unless the import is made in large volume.

Based on the above mentioned facts and policies, importation of fishery products from Canada would probably be discouraged in the future.

INFORMATION ON DOMESTIC CONSUMPTION

In general, fresh fish are always in preference but when these are not available, people will take salted and spiced dried fish which are fairly cheap, well-preserved and tasteful.

There are now 699 fishery plants who are active in salting (wet and dry), 321 plants in steaming/salting and 97 plants in smoking (hot and cold). All together have a capacity of approximately 950,000 metric tons a year. There are 51 - cold storages having a capacity of about 9,500 metric tons, which are mainly used for freezing shrimps. Usually, frozen fish are not taken in the rural areas based on the assumption that these fish are not healthy and possibly were already kept too long. Canned

fish are not liked very much and also their prices are more expensive. Now there are 10 canneries in this area with a total capacity of about 26,000 metric tons a year. Inland fish are not preserved or frozen but normally are taken on the day of catching so as to keep the fish still in fresh condition.

PRODUCTION AND MARKET OF NEW FISH PRODUCTS

Local production is still in the infant stage and the local native fishermen who use traditional catching and processing methods are still the major suppliers of domestic fishery products.

Apart from those small fishermen, there are now 50 large fishery companies in Indonesia, 17 of which are all (except one), Indonesian - Japanese joint ventures. In addition, there are 5 state owned fishery companies, i.e. 3 (P.T. Tirta Raya Mina, P.T. Usaha Mina and P.T. Karya Mina) were set up under ADB financing, the other two (P.N. Perikani Air Tembaga and PERUM Samudra Besar) were respectively financed under IBRD and Japanese funding. The Japanese suppliers and consultants are very active in the local fishery sector and penetration to the local market by other countries would be very difficult unless the companies in question are extremely aggressive. At least 80% of the fishery equipment marked in this area are of Japanese make.

Canada, through CIDA funding, has attempted in the past to participate in the Bitung Fish Canning Factory but the results so far have not materialized.

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FISHERIES MARKET DEVELOPMENTS



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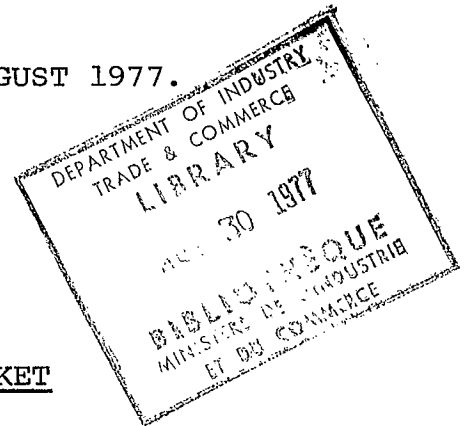
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FMD/77-3

AUGUST 1977.



JAPANESE FISHERIES MARKET

Herring Import Quota

In addition to the 13,000-ton quota announced earlier this year, it is expected another 22,000 tons will be announced. In addition, the Hokkaido Federation of Fisheries Cooperative Associations has established a set of specifications to apply to the Atlantic herring.

General Market Conditions

There is a softening trend in the Japanese market, particularly for the north Pacific species. The prices for herring, herring roe and salmon roe are all falling.

HERRING IMPORT QUOTA

The current situation with respect to the Japanese herring quota is as follows:

1. Roe Herring Quota - 13,000 metric tons

This quota was announced earlier this year and it is estimated approximately 9,500 tons have been filled (3,500 tons from Canada and 6,000 tons from the United States). There is a possibility that the remaining 3,500 tons will be transferred to food herring.

2. Atlantic Food Herring - 12,000 metric tons

This quota is yet to be announced, although the quantity has been set. The quota will be applied to some 3,000 tons of Atlantic herring already in Japan but held in bond pending the official announcement of the quota and an additional 3,000 tons in transit or ready to be shipped. The expectations are that this quota will be eventually filled by Canadian shipments of 8 - 9,000 tons and United States shipments of 3 - 4,000 tons.

Since the Japanese processors are unfamiliar with Atlantic herring, the Hokkaido Federation of Fisheries Cooperative Associations, which administers all herring import quotas, has defined a set of specifications for top grade herring as follows:

.../2

- (a) minimum length - 23 cm measured from nose to tail joint
- (b) minimum weight - 200 g
- (c) high fat content (while not specified, the processors require minimum 10 - 11% fat content)
- (d) roe content to be in excess of 4% to qualify for premium
- (e) scales must be on
- (f) content of herring not meeting above specifications must not exceed 5%

3. Pacific Food Herring

The quota for the Pacific food herring is not expected to be announced until the fall of this year. The actual quantity is still subject to speculation and will depend on the herring catch near Hokkaido which has been much better than expected (some 14,000 tons landed as of the end of July). Herring landings are continuing and if they reach 20,000 tons, the expectation is that the quota will be set at approximately 10,000 tons.

GENERAL MARKET CONDITIONS

Due primarily to a strong consumer resistance to the very high prices, there is a general softening of the Japanese fisheries market as evidenced by falling prices. The downward trend in the prices is particularly evident for the north Pacific species, the prices for which reached unprecedented levels during April and May this year. The following details relate to products of particular interest to Canada:

Herring and Products

With reference to the market for herring roe, the Tokyo Central Wholesale Market (TCWM) prices for extra large roe have fallen by about 8% from yen 5200/kg which prevailed throughout June and for most of July, to the current level (Aug. 2) of yen 4800/kg. Consumer demand is reported to be sluggish and in support of this view, the trade in Japan has estimated that, of the 8,000 tons imported to the end of June, the actual consumption has been about 7 - 800 tons. If this estimate is accurate and demand continues to be sluggish during summer and fall, substantial quantities will have to be consumed over the new year season.

Dried herring (migaki nishin) prices have been more stable with TCWM prices falling only slightly from yen 1500/kg in early June to the current yen 1400/kg.

Salmon Roe

Salmon roe prices, which started the season at about yen 10,000/kg, have fallen very rapidly and as of the end of July were ranging from yen 5500 to yen 6000 (no. 1 chum or sockeye, Alaskan). With the arrival of the peak production season in the United States and Canada and the consequent increase in imports, prices are expected to fall even further. The total imports from North America are expected to reach 5800 tons (1300 tons from Canada and 4500 tons from the U.S.), or about the same level as 1976, a record year.

It appears that the market was over-reacting to the declaration of the 200-mile fishing limit by the United States, U.S.S.R. and Canada. The conditions are settling but still extremely fluid.

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FISHERIES MARKET DEVELOPMENTS



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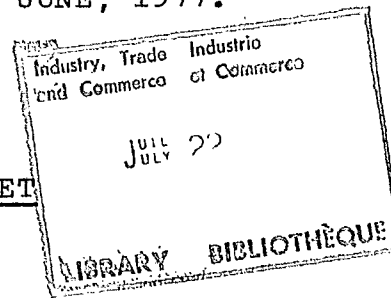
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FMD/77-2

JUNE, 1977.

JAPANESE FISHERIES MARKET



Herring and Herring Roe

The current prices of herring roe are substantially higher than a year ago. The imports of frozen round herring as of the end of March reached 7,553 metric tons compared against 315 tons imported during the corresponding period in 1976.

Japan and the 200-mile limit

As a background to the expected future inclusion of articles on the effect of the 200-mile limit on Japan a review of the Japanese fisheries is included. Quota agreements with the United States and USSR and the effect of the new regime on price levels are also discussed.

HERRING AND HERRING ROE

During early April San Francisco roe from the 1977 production was being auctioned at prices 10-16% above (depending on size) those of the Canadian product from the 1976 production. For the month of April the Tokyo Central Wholesale Market (TCWM) prices for the San Francisco product have been relatively stable at yen 5200/kg (\$8.70/lb. at exchange rate of 0.00369) for extra large and yen 5000 (\$8.37) for the smaller sizes. In comparison, the prices for the 1976 Canadian product, last quoted on April 5, were yen 4700 (\$7.89), yen 4500 (\$7.53), yen 4400 (\$7.36) and yen 4300 (\$7.00) for the various sizes.

The first shipment of Canadian herring roe from the 1977 season reached Japan on April 5 and the first auction at Sapporo (for distribution to processors) took place on April 18. A total of some 70 tons was put up for auction and it is reported that about 80% was sold. The prices varied depending on the buyer and supplier but grade 1 roe brought prices between yen 4450-4530/kg (\$7.45-7.50/kg) and yen 3950-3955 (\$6.61) for grade 2 roe.

Tokyo Central Wholesale Market quotations for the Canadian roe from the 1977 production appeared for the first time on May 6. On that day the price quoted for the extra large roe was yen 5200 and for other sizes, yen 5000 (\$8.70/lb. and \$8.37 respectively. The weekly modal prices for the period May 9-June 4 are as follows: (1976 modal prices for the corresponding weeks in brackets).

	<u>Extra Large</u>	<u>Large</u>	<u>Medium</u>	<u>Small</u>
May 2- 7	\$8.70/lb.(6.95)	8.62(6.65)	8.37(6.35)	8.37(6.20)
9-14	8.87 (6.95)	8.37(6.65)	8.20(6.35)	8.37(6.20)
16-21	8.87 (6.80)	8.37(6.50)	8.30(6.35)	8.37(6.20)
23-28	8.79 (6.80)	8.37(6.65)	8.20(6.35)	8.20(6.20)
30-June 4	8.70 (6.50)	8.37(6.35)	8.03(6.35)	8.37(6.20)

Notes: 1977 exchange rate 0.00369; 1966 rate 0.00333

As can be seen from the above the prices at the wholesale level are substantially higher than in 1976. While specific numbers are not available, the trade is reporting that the demand at the consumer level is weak and the product movement slow.

As can be seen from the table below the Japanese imports of frozen herring during January-March 1977 reached some 7,553 tons. This quantity is in excess of the total quantity imported during all of 1976 and contrasts sharply with 315 tons imported during the first quarter of the same year. At \$0.24/lb., the average import value for the first quarter of this year is only about half of that for the same period a year ago. This indicates that the 1977 imports consist primarily of food herring and not of roe herring as was the case in 1976.

JAPANESE ROUND HERRING IMPORTS

January-March 1977

	<u>Jan.</u>	<u>Feb.</u>	<u>Mar.</u>	<u>Jan.-Mar.</u>	<u>Total</u>
Canada	422	1315	4245	5982	-
United States	212	222	1137	1571	315
Total	634	1537	5382	7553	315

The reasons behind both the increase in the quantity and the emphasis on food herring were discussed in the March issue of this report. The fisheries agreement between Japan and USSR, which was recently concluded, has completely excluded the Japanese herring fleet from the USSR waters, at least for 1977. The effect of the expected shortage of herring is already apparent in prices at various levels of the distribution chain. At the processors' level where the herring represents the raw material for migaki nishin (dried herring), prices are reported to be yen 470-500/kg. (\$0.79-\$0.84/lb.), or about 3 times the 1976 level, and the prices for the finished product at TCWM are as high as 1550/kg (\$2.59/lb.). It is interesting to note that the Tokyo metropolitan government, in an effort to curb the spiralling fish prices, recently (June 1) released for sale at discount prices a quantity of frozen roe herring. The buyers in this instance were comprised of retailers and the prices were as follows:

LL (60 pieces/20 kg case)	yen 14,500/case (\$1.21/lb.)
L (65)	yen 12,500/case (\$1.05/lb.)
M (100)	yen 12,000/case (\$1.00/lb.)

The expected prices to the consumers are (in yens per piece) 350(\$1.76/lb.), 250(\$1.36/lb.), and 150(\$1.26/lb.) for LL, L, and M sizes in that order.

JAPAN AND THE 200-MILE FISHERIES ZONE

In 1975 the total quantity of food fish consumed in Japan was some 7.7 million metric tons. In the same year, the Japanese fish landings reached 10.5 million metric tons, of

which some 38% was caught within 200-miles of other nations. Clearly the global implementation of the 200-mile fisheries zone will have far reaching implications for Japan. It is expected that the future issues of this report will touch on this subject from time to time, and in order to provide background material, a review of the Japanese fisheries is included below.

(1) Landings

The Japanese landings of all aquatic products in 1975 was 10,545 thousand metric tons. Of this quantity 22 major species accounted for 7,996 thousand tons, or 75.8% of the total. Landings for these species for the period 1968-75 are detailed in Table I attached. All species with landings exceeding 100 thousand tons at least once during the period are included and are listed in the order of their 1975 landings.

It is immediately obvious that, in terms of quantities landed, Alaska pollock and mackerel are by far the most important species. In 1975 they accounted for 3,995 thousand tons or 37.9% of the total landing for that year.

The estimated Japanese catch within 200 miles of the coasts of other nations were 3,744 thousand tons in 1975, or some 35% of the total landings in that year (Table II). The catch within

200 miles of Japan's own coast amounted to 5,503 thousand tons, or 57%. Presumably the remaining 8% was caught in international waters.

In reviewing the available data it becomes clear that Alaska pollock (75.6% caught in foreign waters), flatfish and flounder (62.7%), rockfishes (70.5%), squids and cuttlefish (57.8%), and herring (80.6%) are the species most likely to be affected by the 200-mile fisheries jurisdictions (Table III). Significant proportions of crabs (30.3%), horse mackerel (20.8%) and salmon (16.4%) are also caught in foreign waters.

(2) Consumption

The apparent gross domestic consumption (domestic production plus imports minus exports) of both edible and inedible fisheries products in 1975 was 10,230 thousand tons in round weight equivalent (Table IV). Of this quantity some 7,763 thousand tons, or 75.9%, was consumed as food (Table V).

The per capita consumption for food in 1975 was 69.4 kg, down slightly from that in 1974 but up by some 14% from 1968 (Table VI). It would appear that the per capita consumption has stabilized at about 70 kg.

(3) Imports

Japanese imports of all fisheries products (edible and inedible) in 1975 amounted to some 1,125 thousand tons round weight (Table VII). This compares with 952 thousand tons imported in 1968, an increase of 18%. It is interesting to note that during the same period the value of imports increased from 190,338 million yen (average value, yen 200/kg) to 385,529 million yen (average value yen 343/kg) or by almost 100%. While some of this increase can be attributed to inflationary factors, most of it is probably due to changes in the composition of the products imported.

It is quite clear from Table VII that the trend has been away from the imports of inedibles and toward food products. In 1968 food products accounted for only a quarter of the total quantity of fisheries products imported, and by 1975 this proportion had risen to 70% and has gone above 80% in some years. In terms of volume, the imports of food products in 1968 amounted to 237 thousand tons and in 1975, 789 thousand tons, an increase of some 237%.

As a proportion of the apparent domestic food fish consumption, the share of imports (for food only) has been growing steadily. Again referring to Table VII, it can be seen that the share of the imports was 3.9% in 1968 and in 1975 it was 10.2%.

Statistics relating to individual species are available in product weight only and these are shown for some of the major products in Table VIII. It can be seen from the Table that shrimps and tunas are by far the largest import items and that, with a few exceptions, most of the products listed show very dramatic growth rates over the period 1968-75.

(4) Exports

In 1975 Japanese exports of all fisheries products, both edible and inedible amounted to 994 thousand tons round weight (Table IX). Of this quantity 235 thousand tons, or 24%, represented exports of meal. In considering the exports of food products alone it can be seen that there was an actual decline from 780 thousand tons in 1968 to 759 thousand tons. All of this fall can be accounted for by the decline in the export of whale meat and marine plants.

Exports by major products are shown in Table X. Canned products, particularly canned mackerel, are the major export items. Of particular

interest is the increase in the canned sardine exports and the decline in the exports of fresh and frozen tuna;

The effects of the new 200-mile regime is already apparent in Japan. Two of the more important of these effects are the decline in landings and the increases in price levels of fishery products. These are discussed in more detail below.

(1) Quota Agreements with the United States and USSR.

Since the waters off these nations represent some of the key areas for the Japanese distant sea fleets, their declaration of the 200-mile fisheries jurisdictional zone was viewed with a considerable degree of trepidation. The United States issued foreign quotas in February 1977, and an agreement was reached with USSR in late May, after a protracted period of negotiations spanning some 90 days, regarding Japan's access to its waters. Both agreements are for 1977 only and do not necessarily reflect long term trends.

Of the nearly 1.9 million metric tons which the United States will allow the foreign vessels to catch during 1977, Japan has been allocated some 1.2 million metric tons (exclusive of salmon and tuna). While for the Japanese this represents a decline of 11% from the estimated 1976 landings in the same area, the Japanese apparently expected larger cuts. The Japanese share of the catch allocation by species is as follows:

ALLOWABLE JAPANESE CATCH IN US WATERS JANUARY-DECEMBER 1977
(thousand metric tons)

Species	Total Foreign Quota	Actual Japanese catch 1976 (est.)	Allocated to Japan Quantity	% Change
<u>Pacific Coast</u>				
Alaska Pollock	1099.0	1000.0	836.4	-16
Rock Fishes	54.5	69.0	31.8	-54
Alaska Black Cod	26.9	28.0	19.5	-30
Flatfishes	231.5	115.0	142.3	+24
Cod	60.3	32.0	39.7	+24
Herring	20.0	7.0	5.8	-17
Squid	10.0	5.0	10.0	+100
Tanner Crab	12.5	10.2	12.5	+23
Winkles	3.0	3.1	2.7	-13
Salmon	Not applicable	15.0	Not applicable	-
Tuna	Not applicable	11.0	Not applicable	-
Others	261.0	46.7	68.7	+47
Total Pacific (Excl. Salmon & Tuna)	1778.7	1316.0	1169.4	-11
<u>Atlantic Coast</u>				
Squid	42.5	11.0	11.26 *	+2
Other	65.5	7.0	10.30	+47
Total Atlantic	108.0	18.0	21.56	+20
Grand Total Pacific and Atlantic (Excl. Salmon and Tuna)	1886.7	1334.0	1190.96	-11

* Will increase if US catch fails to reach planned levels.

The agreement with USSR covers the period June-December 1977 and therefore comparative 1976 figures are not yet available. The agreed quota by species is as follows:

ALLOWABLE JAPANESE CATCH IN USSR WATERS JUNE - DECEMBER 1977
(thousand metric tons)

<u>SPECIES</u>	<u>QUANTITY</u>
Alaska Pollock	100.0
Squid	132.0
Sandlance	79.3
Flounder	9.0
Rockfish	6.9
Cod	19.0
Komai	10.4
Atka Mackerel	1.0
Shrimp	1.2
Saury	63.4
Octopus	1.9
Others	19.8
Tanner Crab	2.3
Other Crab	5.3
Winkle	3.5
Total	455.0

(2) Price Levels

There has been some dramatic price increases, particularly for the north Pacific species. Although not all price increases are attributable to the 200-mile regime, it is a significant contributing

factor. Comparative 1976 and 1977 prices for some selected species and products are shown below. The prices relate to Tokyo auction prices which prevailed during late April (1976 prices in brackets).

<u>SPECIES</u>	<u>PRICES</u>
<u>Fresh</u>	
Dab (yen/kg)	650 (less than 300)
Cod (yen/kg)	750 (less than 500)
<u>Frozen</u>	
Ocean Perch (yen/kg)	Large 750(290), medium 500(260)
Herring (yen/kg)	LL 600(170), L 500(150)
Black Cod	L 720(410), M 650(370)
Greenland Turbot (yen/kg)	320(200)
Chum Salmon (yen/kg)	1340(940)
Tanner Crab (yen/case)	7700(8400)
Cuttlefish (yen/kg)	Ex. Large 1280(1280), Small 900(950)
Octopus (yen/kg)	Large 700(720), Small 420(450)
Sea Bream (yen/kg)	Large 460(375), Small 325(300)
Silver Hake (yen/kg)	415(250)
Common Squid (yen/case)	21-25/case 5000(3450) 26-30/case 3400(1700)
Tunas	Average prices are about 20% higher
<u>Salted</u>	
Herring Roe (yen/kg)	Large 5000(4200-4300)
Chum Roe (yen/kg)	Grade 1 7600(7500)
Alaska Pollock Roe (yen/kg)	Grade 1 1800-2200(800-900)

As can be seen from the above the prices are generally higher in 1977 than in 1976. Particularly significant are the prices for the north Pacific species such as herring (1977 prices some three times 1976), black cod (double), chum salmon (1.5), and Alaska pollock roe (double).

S. Ishiguro,
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Agriculture, Fisheries & Food Products Branch. (49)

TABLE I
JAPANESE CATCH BY MAJOR SPECIES

1968 - 1975

Unit: Thousand metric tons round weight

	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>	<u>1974</u>	<u>1975</u>
Total catch	8,670	8,613	9,315	9,909	10,213	10,763	10,808	10,545
Alaska Pollock	1,606	1,944	2,347	2,707	3,035	3,021	2,856	2,677
Mackerel	1,015	1,001	1,302	1,253	1,190	1,135	1,331	1,318
Japanese Pilchard	24	21	17	57	58	297	352	526
Common Squid	668	478	412	364	464	348	335	377
Flounders and Soles	252	290	288	340	349	380	349	341
Porphyra	145	134	231	245	218	311	339	278
Sand Lance	150	107	227	272	195	194	300	275
Skipjack	169	182	203	172	223	322	347	259
Saury	140	63	93	190	197	406	135	222
Oyster	267	245	191	194	217	230	211	201
Freshwater Fish	155	164	168	151	165	179	179	199
Jack Mackerel	311	283	216	271	152	128	165	186
Salmon	114	141	118	139	120	136	132	159
Laminaria	170	148	111	152	155	131	119	158
Squids (other than common and cuttlefish)	90	95	92	103	120	126	118	138
Short necked clam	120	117	142	126	116	114	138	122
Undaria	125	98	122	133	127	139	174	121

TABLE I

- 2 -

	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>	<u>1974</u>	<u>1975</u>
Total catch	8,670	8,613	9,315	9,909	10,213	10,763	10,808	10,545
Bigeye Tuna	96	100	92	89	98	105	102	113
Rock Fishes	147	115	87	100	101	111	123	95
Pacific Cod	109	104	117	93	88	109	108	92
Yellowfin Tuna	115	90	79	71	68	76	76	72
Herring	68	85	97	100	62	83	76	67
Total Principal Species	6,056	5,985	6,752	7,322	7,538	8,081	8,065	7,996

TABLE II

ESTIMATED STATUS OF JAPAN'S FISHERIES WITHIN 200 NAUTICAL MILES OF FOREIGN COAST

Unit: ('000 metric tonnes)

	<u>1974</u>	<u>1975</u>	
World Total Fish Catch	69,845	69,732	... Note 1
Japan's Total Fish Catch	10,808	10,545	... Note 2
Marine Fish Catch	9,749	9,573	
Fish Catch Within 200 Miles of Foreign Coast	4,256 (4,477)	3,744	
U. S. A.	1,585	1,410	
Canada	26	21	
U. S. S. R.	1,630 (1,851)	1,396	
P. R. China	180	152	
North & South Korea	209	241	
Australia	18	12	
New Zealand	78	80	
Others	530	432	
Ref: Fish Catch Within Japan's 200 Miles	5,236 (5,015)	5,503	
Northern Four Islands Area	221	300	
Takejima Area	-	9	
Senkaku Islands Area	-	51	

Figures in the bracket include the fish catch in the Northern four Islands Area as of the U.S.S.R. 200 miles.

Note 1: F.A.O. Statistical info.

Note 2: Ministry of Agriculture & Forestry Statistics

TABLE III
 JAPANESE CATCH WITHIN FOREIGN WATERS BY MAJOR SPECIES
 1975

Unit: '000 metric tons

N/A : Not applicable

SPECIES	Total catch	U.S.A.		CANADA		U.S.S.R.		CHINA		N & S KOREA		AUSTRALIA		NEW ZEALAND		TOTAL CATCH IN FOREIGN WATERS	
		Q	%	Q	%	Q	%	Q	%	Q	%	Q	%	Q	%	Q	%
Alaska Pollock	2,677	1,049	39.2	-	-	976	36.5	-	-	-	-	-	-	-	-	2,025	75.6
Flatfish & Flounder	341	125	36.7	-	-	62	18.2	6	1.8	21	6.2	-	-	-	-	214	62.7
Rockfish	95	56	58.9	11	11.6	-	-	-	-	-	-	-	-	-	-	67	70.5
Black Cod		23		4		-	-	-	-	-	-	-	-	-	-	27	
Squid & cuttlefish	531	19	3.6	-	-	108	20.3	16	3.0	61	11.5	-	-	23	4.3	227	42.7
Tuna, Swordfish & Skipjack	620	11	1.8	-	-	-	-	-	-	-	-	11	1.8	5	0.8	27	4.4
Salmon	159	8	5.0	-	-	18	11.3	-	-	-	-	-	-	-	-	26	16.4
Herring	67	-	-	-	-	54	80.6	-	-	-	-	-	-	-	-	54	80.6
Mackerel	1,318	-	-	-	-	-	-	8	0.6	49	3.7	-	-	-	-	57	4.3
Horse Mackerel	236	-	-	-	-	-	-	21	8.9	28	11.9	-	-	-	-	49	20.8
Shrimp & Prawns	69	-	-	-	-	-	-	4	5.8	-	-	-	-	-	-	4	5.8
Crab	76	10	13.1	-	-	13	17.1	-	-	-	-	-	-	-	-	23	30.3
Others	N/A	109	N/A	6	N/A	165	N/A	97	N/A	82	N/A	1	N/A	52	N/A	512	N/A
Total		1,410		21		1,396		152		241		12		80		3,312	N/A

TABLE IV

APPARENT GROSS CONSUMPTION - FISHERIES PRODUCTS (EDIBLE & INEDIBLE)
1968 - 1975

Unit '000 metric tons round weight (marine plants in dry weight)

	1968	1969	1970	1971	1972	1973	1974	1975
<u>Total Domestic Production</u> (a)	8421	8413	9023	9565	9928	10892	10336	10099
Fish & Shellfish	8164	8168	8794	9323	9707	10063	10106	9897
Whale	156	156	125	125	109	98	90	76
Marine Plants	101	89	104	117	112	131	140	126
<u>Total Imports</u> (b)	952	778	775	587	802	1134	831	1125
Fish & Shellfish	927	750	745	551	765	1079	779	1071
Whale	11	13	15	18	18	25	29	29
Marine Plants	14	15	15	18	19	30	23	25
<u>Total Supply</u> (a) + (b) (c)	9373	9191	9798	10152	10730	11426	11167	11224
Fish & Shellfish	9091	8918	9539	9874	10472	11142	10885	10968
Whale	167	169	140	143	127	123	119	105
Marine Plants	115	104	119	135	131	161	163	151
<u>Total Exports</u> (d)	834	806	928	965	1037	995	1001	994
Fish & Shellfish	861	783	908	949	1032	991	996	990
Whale	20	20	15	11	2	-	-	-
Marine Plants	3	3	5	5	3	4	5	4
<u>Apparent Consumption</u> (c)-(d)	8539	8385	8870	9187	9693	10431	10166	10230
Fish & Shellfish	8280	8165	8631	8925	9440	10151	9889	9978
Whale	147	149	125	132	125	123	119	105
Marine Plants	112	101	114	130	128	157	158	147

TABLE V

APPARENT FOOD CONSUMPTION

('000 metric tons)

	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>	<u>1974</u>	<u>1975</u>
Apparent Gross Consumption	8539	8385	8870	9187	9693	10431	10166	10230
Less Meal and Feed	2397	2257	2308	2166	2429	2895	2405	2467
Apparent Food Consumption	6142	6128	6562	7021	7264	7536	7761	7763
% Meal and Feed	28.1	26.9	26.0	23.6	25.1	27.8	23.7	24.1

TABLE VI

PER CAPITA CONSUMPTION

	<u>Population</u> <u>('000)</u>	<u>Gross Per Capita</u> <u>(kg)</u>	<u>Food Per Capita</u> <u>(kg)</u>
1968	101,331	84.3	60.6
1969	102,536	81.8	59.8
1970	103,720	85.5	63.3
1971	105,014	87.5	66.9
1972	107,332	90.3	67.7
1973	108,710	96.0	69.3
1974	110,573	91.9	70.2
1975	111,934	91.4	69.4

TABLE VII

JAPANESE IMPORTS OF MARINE PRODUCTS

Unit: '000 metric tons round weight

	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>	<u>1974</u>	<u>1975</u>
Fish & Shellfish - total	927	750	745	551	765	1,079	779	1,071
Food	212	236	294	448	495	664	662	735
Meal	715	514	451	103	270	415	117	336
Whale	11	13	15	18	18	25	29	29
Marine Plants	14	15	15	18	19	30	23	25
Total Imports	952	778	775	587	802	1,134	831	1,125
Total Imports - Food	237	264	324	484	532	719	714	789
Food as % of total	25	34	42	82	66	63	86	70
Food Imports as % of Consumption	3.9	4.3	4.9	6.9	7.3	9.5	9.2	10.2

TABLE VIII

JAPANESE IMPORTS BY MAJOR PRODUCTS

Unit: Metric tons product weight

	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>	<u>1974</u>	<u>1975</u>	<u>% change 1968-75</u>
Shrimps, Fresh or Frozen	35204	48886	57146	78874	88120	117474	103311	113672	223
Skipjack & Tunas Fresh or Frozen	28964	34970	51428	64943	52842	55427	64261	110165	280
Octopus, Fresh or Frozen		36236	35640	64445	63930	54078	67678	74613	106
Squid, Fresh or Frozen	8503	8458	15225	21330	27844	28980	44762	58580	589
Whale Meat Fresh or Frozen	11158	12539	15396	17837	18277	25477	28578	28822	158
Capelin, Fresh or Frozen	1000	1502	1840	4620	10300	50500	56000	18300	1730
Herring, Fresh or Frozen				5032	7621	10168	5688	8856	76*
Spanish Mackerel, Fresh or Frozen	8605	9740	7315	8963	10326	8981	11332	8076	-6
Herring Roe, Salted				788	7378	11076	12573	7611	3*
Jellyfish, Salted	2816	2647	3901	4686	5331	6783	5748	5714	103
Salmon Roe, Salted	5006	3097	5292	5449	4852	4868	4335	3486	-30

* Percent Change 1972-75.

TABLE IX

JAPANESE EXPORTS OF FISHERIES PRODUCTS

Unit: '000 metric tons round weight

	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>	<u>1974</u>	<u>1975</u>
Fish & Shellfish - Total	811	783	908	949	1,032	991	996	990
Food	747	687	791	769	904	906	847	755
Fresh & Frozen	208	162	190	200	265	341	321	193
Canned	519	504	588	555	624	551	509	544
Others	20	21	13	14	15	14	17	18
Meal	64	96	117	180	128	85	149	235
Whale	20	20	15	11	2	0	0	0
Marine Plants	13	13	5	5	3	4	5	4
 Total Exports	 834	 806	 928	 965	 1,037	 995	 1,001	 994
Total Exports-Food	780	720	811	785	909	910	852	759
Food as % of Total	94	89	87	81	88	91	85	76

TABLE X

JAPANESE EXPORTS BY MAJOR PRODUCTS

Unit: Metric tons

	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>	<u>1974</u>	<u>1975</u>
Mackerel, canned	109,431	129,329	161,195	177,332	184,452	177,506	161,106	193,919
Tunas & Skipjacks, canned	58,925	64,490	65,675	46,010	52,810	46,135	32,549	47,541
Skipjacks, fresh or frozen	14,438	7,168	20,472	31,845	52,281	102,685	94,210	27,404
Salmon, canned	38,070	22,297	24,018	28,601	30,350	13,446	12,984	17,720
Saury, fresh or frozen	14,367	16,171	14,337	16,790	21,481	23,066	31,882	17,287
Squids and cuttlefish, fresh or frozen	12,526	15,144	22,361	20,538	25,729	25,707	17,833	15,075
Octopus, fresh or frozen	2,090	1,429	1,248	3,377	7,996	9,951	18,125	10,686
Mackerel, fresh or frozen	3,044	5,351	11,386	13,128	7,363	5,827	8,303	10,374
Sardines, canned	908	239	512	462	1,540	4,151	3,474	5,679
Tunas & Swordfish, fresh or frozen	100,392	63,183	46,291	41,338	47,086	36,085	43,757	5,026



FISHERIES MARKET DEVELOPMENTS



Industry, Trade
and Commerce

Industrie
et Commerce

Agriculture, Fisheries
and Food Products

Agriculture, Pêcheries
et Produits alimentaires

Ottawa, Canada
K1A 0H5

Ottawa, Canada
K1A 0H5

FMD/77-1

MARCH, 1977.

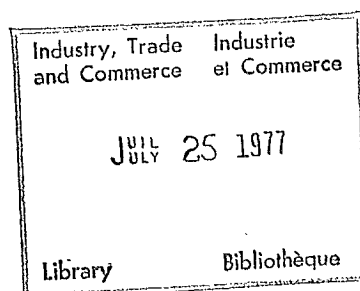
JAPANESE FISHERIES MARKET

Food Herring

The Russian extension of the fisheries limit to 200 miles and the Canadian decision to reduce the allowable export of round roe herring from 25% to 5% of landings have combined to increase Japanese interest in the food herring from the United States and Canada.

Herring Roe

The value of herring roe imported into Japan during 1976 amounted to some \$107 million. The prices at the Tokyo Central Wholesale Market have remained more or less stable since about mid-July and the usual increase in prices during the New Year season was not apparent in 1976.



Food Herring for Japan

In the past the Japanese herring market has been limited primarily to roe herring. The Russian declaration of the 200 mile fishery zone and Canadian action to reduce allowable exports of herring from 25% of landings to 5% will reduce the supply of herring available for processing. For this reason the Hokkaido Federation of Fisheries Cooperative Associations has implemented a policy under which some 9,000 tons of food herring is planned to be imported during 1977. The details are found in the following article from "The Nikkan Shokuryo Shinbun (March 4, 1977)".

The import of round herring into Japan is subject to an import quota. The quota is set each year by the Japanese government and the entire quota is given to the Hokkaido Gyogyo Kyodo Rengo Kai (Hokkaido Federation of Fisheries Cooperative Associations), commonly referred to as Hokkaido Federation, for administration. The actual imports are carried out by trading companies who receive orders from Hokkaido Federation. Once in Japan the imported herring is allocated to various groups for distribution (10% to Aomori Federation, 67.5% to Hokkaido Processors' Association and the balance to Hokkaido Federation itself).

For several years now the actual round herring imports have consistently failed to fill the quota which has remained at about 13,000 metric tons¹ (5,700 tons in 1974, 8,900 tons in 1975 and estimated 6,000 tons in 1976). The reason for this is that the round herring imports were initiated to augment declining domestic roe herring landings due to the depletion of the herring resource. Thus

the understanding has been that the imports would be limited to roe herring. Even when the herring fishery was prohibited in waters north of latitude 52° (under the USSR-Japan Fishery Agreement) reducing the catch even further, this practice continued. While the Japanese would like to import more roe herring, the estimated available supply is only about 21,000 tons (20,000 tons from Canada and 1,000 tons from the United States). However, since South Korea, The United States and Mexico all compete for this supply, the actual quantity available to the Japanese has been insufficient to fill the import quota with roe herring alone.

From The Japanese point of view the supply situation for roe herring worsened in 1977 when the Canadian government reduced the allowable exports of round roe herring from 25% of landings to 5%. Assuming Canadian landings of 80,000 tons, this action effectively reduced the available supply of Canadian roe herring from 20,000 tons to 4,000 tons. Given the past competition from North Korea and others, the supply available to the Japanese would be drastically reduced. However, the Japanese are hopeful that virtually all of the 4,000 tons will be made available to them. They reason that the Canadians are aware that the roe from herring exported to third countries is re-exported to Japan, and in order to minimize competition from the third countries, exports of roe herring to these countries would be curtailed. Even if it can be assumed that all of the Canadian roe herring is made available to Japan and even with the additional 1,000 tons from the United States, the total quantity available would be far below the level required to fill the import quota.

At the same time the present prospects for the domestic sources of supply are not bright. Since a major portion of the Japanese Herring catch occurs near USSR waters², the declaration by that country to extend its fishery zone to 200 miles is expected to severely affect the Japanese herring fishery. Almost all of the herring caught by the Japanese is food herring (i.e. without roe)

and a major portion of this catch is used as raw material for dried herring. For this reason the Russian action is expected to generate shortages of raw material for this product. The processors, fearing this eventuality, had made representation to the Hokkaido Federation to include food herring in its herring imports.

The Hokkaido Federation agreed to import food herring although its basic position continues to be to increase the imports of roe herring. Under its new policy the Hokkaido Federation has allocated 9,000 tons of the total quota for food herring, and as of March 1 about 3,200 tons has been imported. Of this quantity 1,200-1,300 tons have cleared customs and inspection and Hokkaido Federation is presently negotiating prices with the Processors' Association.

1. For 1977 the quantity that can be imported is 21,400 metric tons consisting of 10,000 tons from the 1977 quota, 7,500 tons from the unused portion of the 1976 quota and 3,900 tons from the special quota for 1977. (ED.)
2. During 1976 the Japanese herring landings were some 54,000 tons of which estimated 49,000 tons were caught within USSR waters. (ED.)

Japanese Herring Roe Imports & Prices

In 1976 Japan imported some 11,698 metric tons of herring roe with an import value of some \$107 million (C\$=271 yen). Canada was the largest supplier accounting for some 7,661 tons, or 65%, and \$68 million, or 65%, of the total quantity and value imported. Other major suppliers were China, South Korea and the United States, in that order. These four major suppliers (including Canada) accounted for virtually all of the herring roe imported into Japan. (Ref. table below).

JAPANESE HERRING ROE IMPORTS
1975 and 1976

	<u>1975</u>	<u>1976</u>
Canada	4,360 M/T	7,661 M/T
China	1,116	1,447
South Korea	975	1,360
U.S.A.	1,106	1,202
Others	<u>54</u>	<u>28</u>
Total	7,611	11,691

With reference to prices at the Tokyo Central Wholesale Market, there has been very little change since about mid-July. The expected increase in prices during the New Year season did not materialize and there was no distinct peak usually observable during that period of the year. The current prices (in yens per kilogram) are approximately 4600, 4400, 4200, and 4300 for extra large, large, medium and small grades, in that order.

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