United Kingdom markets for edible fish products with special reference to products of developing country origin (G190)

Tropical Development and Research Institute

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NOTES

ACP	African, Caribbean and Pacific States
BTN	Brussels tariff nomenclature
c.i.f.	Cost, insurance, freight
c.& f.	Cost and freight
EC	European Community
EEZ	Exclusive Economic Zone
f.o.b.	Free on board
GSP	Generalised system of preferences
IQF	Individual quick frozen
LDDC	Least developed developing countries
MAFF	Ministry of Agriculture, Fisheries and Food
OCT	Overseas Countries and Territories
SITC (R2)	Standard International Trade Classification, second revision
TAC	Total allowable catch

All values, unless otherwise stated, are given in £ sterling.

All weights, unless otherwise stated, are metric.

Summaries

SUMMARY

United Kingdom markets for edible fish products with special reference to products of developing country origin

This report covers United Kingdom markets for edible fish products with special reference to the potential for products of developing country origin. Major product categories, identified on the basis of trade classification are as follows:

- fresh/frozen fish (SITC* 034 (R2))
- dried/smoked fish (SITC 035 (R2))
- fresh/processed crustaceans (SITC 036 (R2))
- canned fish and crustaceans (SITC 037 (R2)) (*See* p.15)

Report structure

Section 1 of the study provides an overview of the United Kingdom markets for edible fish products and identifies areas within each major product category which are of special interest with particular reference to developing country suppliers. Each of these areas of interest is then discussed in more detail in Sections 2-5 in the context of major product categories, which are presented in order of importance to current and potential developing country suppliers. The report concludes with a section covering pricing, trade regulations and procedures for developing country exporters to enter the market.

United Kingdom market

United Kingdom markets for edible fish products are primarily supplied by the domestic catch, which in 1982 amounted to around 775,000 tonnes. However, trade is also substantial with exports in 1982 of 260,000 tonnes and corresponding import volumes of 325,000 tonnes. (*See* p.17).

Consumption levels are difficult to assess as a result of differing levels of processing prior to final consumption of end products, but approximate levels for major products in 1982 were as follows:

- fresh/frozen fish—65,000 tonnes
- canned fish and crustaceans—55,000 tonnes
- fresh/processed crustaceans—10,000 tonnes
- dried/smoked fish—probably below 10,000 tonnes (*See* p.15)

The variable level of the United Kingdom catch affects the role of imports in meeting market requirements. Consumer tastes, especially those relating to well-established fish species, are also of major importance in determining the composition of imports. (*See* p.15).

* SITC (R2) = Standard International Trade Classification, second revision

Developing countries have achieved varying degrees of penetration of the four product markets identified, 1982 import volumes and values being as follows:

	% of total import volume
— fresh/frozen fish: 2,000 tonnes, £1.9 million	0.9
— canned fish and crustaceans: 25,700 tonnes, £34.3 million	30.2
— fresh/processed crustaceans: 7,500 tonnes, £21.4 million	41.7
— dried/smoked fish: 150 tonnes, £0.4 million	5.0

(*See* p.20)

Fresh/frozen fish

The most important import market is for fresh/frozen fish, which in 1982 amounted to 220,000 tonnes valued at £194 million. Such imports overwhelmingly comprise traditionally-preferred, whitefish species where the domestic catch is insufficient to meet demand. Virtually all such supplies are from European and North American countries with access to North Atlantic fisheries. (*See* pp.37 and 38).

Limited penetration by developing country suppliers in this market is primarily explained by the limited number of required species and the ready availability of supplies from European and North American countries in particular. Even where developing countries could supply species which are complementary in the sense of organoleptic qualities, a substantial price discount would be required to penetrate the market. The ready availability of the desired species themselves provides little incentive to look for alternatives, even if these are low priced. (*See* p.40).

The most important market segment which is supplied by developing countries is that for specialist 'exotic' species. The latter account for 85% of current developing country fresh/frozen fish exports to the United Kingdom, but in comparison to the fresh/frozen market as a whole, volumes and values are very small. Growth in exotics markets has not been very significant and as a result, developing country suppliers have been confronted with very limited market prospects. (*See* p.42).

Canned fish and crustaceans

The second most important import market is for canned fish and crustaceans, which amounted to 85,000 tonnes in 1982, valued at £162 million. Domestic production of canned products is small (at around 15% by volume of imports), and whilst some imported items are well established, others, notably tuna, have become significant during the 1970s. For established species such as salmon, North American suppliers are particularly important, whilst others including tuna and pilchards are partly supplied by a large number of developing countries. (*See* pp.22 and 23).

Canned fish and crustaceans represent the largest market for products of developing country origin. Tuna represents the largest individual product market supplied from such origins and growth in consumption has been estimated by trade sources to be at around 10% per annum. (*See* p.24).

Demand for a number of other species, notably sardines and pilchards, has been partly met by developing country suppliers for many years, but consumption levels of these products have been static and species requirements limit the number of countries able to meet market needs. Crab and shrimp and prawn represent smaller-scale markets where consumption has increased, although rather erratically. (*See* p.26) .

Fresh/processed crustaceans

Fresh/processed crustaceans are relatively less important in comparison to the two product categories above, with import volumes of 18,000 tonnes valued at £45 million in 1982. Imports are largely confined to shrimp and prawns, since market demand for other species of crustaceans (and molluscs) is very largely met from the United Kingdom catch; in fact the country is a net exporter of many items. (*See* pp.31 and 32).

Imports are supplied from a wide range of countries, including developing countries who primarily supply warm water species of shrimp and prawns. (*See* p.33).

Shrimp and prawns represent the second most important market (after canned products) for developing country suppliers. The market for cold and warm water species combined has grown at around 5% per annum, and shortfalls both in domestic catch and in supplies from other producers of cold water species have led to a fairly dramatic expansion in imports from developing countries over the five years up to 1982. (*See* p.34).

Dried/smoked fish

The final category of imports, dried/smoked fish, is of marginal importance, comprising 3,000 tonnes by volume in 1982, valued at £3 million. Because of the small volumes involved, few details of trade are available, but developing countries play very little part. (*See* pp.48 and 49).

Demand is largely met from domestic production and the United Kingdom is a net exporter of many items.

Prospects for new developing country suppliers

The best potential markets for new developing country suppliers are provided by canned products, followed by fresh/processed crustaceans. Potential in the other two product categories, fresh/frozen fish and dried/smoked fish is very restricted, especially for the latter.

Amongst canned products, the best potential is provided by the tuna market, with consumer demand expected to continue to increase at 10% per annum in the context of supply shortages amongst many current supplying countries. Canned pilchard and sardine markets may offer some limited opportunities, but market demand is expected to remain static or even decline, and species requirements limit the number of potential developing country suppliers. Canned shrimp and prawn and crab represent small markets, but unit values are high and consumer demand is expected to expand although at a modest rate. (*See* p.29).

Amongst fresh/processed crustaceans, frozen shrimp and prawn will represent easily the best (indeed virtually the only) product market for new suppliers. Growth in consumer demand is expected to continue, unit values are high and supplies are constrained from a number of current supplying countries of both cold and warm water species. There are virtually no opportunities in other fresh/processed crustacean and mollusc markets. (*See* p.36).

Marginal opportunities may arise for new suppliers of exotic frozen fish, but markets for individual species are very small, unit values are not generally very attractive and growth in demand is expected to remain limited. Market opportunities in other fresh/frozen fish markets are likely to be very limited indeed. (*See* p.46).

There are virtually no prospects at all for new developing country suppliers in markets for dried/smoked fish products. (*See* p.51).

Trade structure

With regard to imports of developing country origin, the trade structure in the United Kingdom can be broadly divided between that relating to fresh/frozen fish, fresh/processed crustaceans and dried/smoked fish and that relating to canned products. Importers and processors handling the first three categories of products tend to overlap. In particular, companies handling shrimp and prawn, easily the most important product in the grouping, also usually handle fish imports more or less as a sideline. (*See* pp.52 and 53).

A relatively small number of companies handle the bulk of developing country imports of canned products. A larger number of smaller-scale importers and buying agents are also involved together with some importing direct by large retail chains through central buying agents. Smaller-scale companies are generally more flexible in terms of accepting supplies from a larger range of developing countries, whilst some larger firms prefer to develop longer-term supplies from established producers. (*See* p.52).

A different group of companies handles imports of other fish products. A small group of medium-sized firms specialise in the importation and further processing of shrimp and prawn. A larger number of smaller-scale importers are active but seldom undertake processing. Both groups often handle imports of exotic fish, both fresh/frozen and dried/smoked, although the latter are very limited indeed. In a few instances, amongst small-scale importers, fish represent the more important item handled. (*See* p.53).

Trade regulations

Trade regulations are particularly important for all items covered by the study since these products are destined for human consumption. United Kingdom regulations with regard to quality and handling specifications and health regulations are strict, and failure to meet such regulations has an extremely adverse affect on suppliers' reputations and future ability to penetrate the market. All items are subject to clearance by Port Health Authorities and cannot be sold unless passed. (*See* p.55).

Import duties

Duties applicable to edible fish products vary quite widely. Full rates are highest for canned products, being generally around 25%, with the exception of salmon. Fresh/processed crustaceans attract duty levels up to 18%, whilst those on other items range up to 15%. (*See* p.58).

However, most developing countries have either African, Caribbean and Pacific (ACP), overseas countries and territories (OCT) or least developed developing countries (LDDC) status. ACP and OCT countries obtain full duty exemption on all edible fish products whilst LDDCs obtain exemption on a majority of items. Overall the effects of tariffs on developing countries is therefore quite limited. (*See* p.58).

Pricing

Pricing of edible fish products varies to a very large degree, partly because of the large number of different products falling within the product group, and also because of seasonal and other market factors. Over the period 1977–79 fish prices rose faster than those for meat and meat products, but since then have increased at a significantly slower rate, both in comparison to meat and meat products, and for food products as a whole. (*See* p.59).

Within the fish product group a number of items where developing countries are current and potential suppliers are of relatively high value, most notably frozen shrimp and prawn followed by canned crab and shrimp and canned fish, especially tuna. (*See* p.59).

Procedures for new developing country suppliers

Partly because of the existence of stringent regulations, most major importing companies offer advice to potential new suppliers. In many cases companies go further and require an actual visit to suppliers' plant to check on the quality of operations prior to accepting supplies. Smaller-scale importers may be more flexible in terms of accepting shipments from new suppliers, but are nonetheless careful to ensure that regulations and health requirements are met. (*See* p.62).

In order to penetrate markets successfully, new suppliers are strongly advised to co-operate closely in meeting the requirements stipulated by importers. Particular attention is required with respect to competitive pricing, quality control and delivery scheduling. Procedures for new suppliers are identified in Section 6, and a list of importers and contact points provided in Appendix 7.

RÉSUMÉ

Marchés du Royaume-Uni pour les produits de pêche comestibles, en particulier les produits provenant des pays en voie de développement

Ce rapport a pour objet l'étude des marchés du Royaume-Uni pour les produits de pêche comestibles, en insistant spécialement sur les possibilités qu'ils offrent pour les produits en provenance des pays en voie de développement. Les principales catégories de produits, identifiées sur la base de la classification commerciale, sont les suivantes:

- poisson frais/congelé [SITC* 034 (R 2)]
- poisson séché/fumé [SITC 035 (R 2)]
- crustacés frais/traités [SITC 036 (R 2)]
- poisson et crustacés en conserve [SITC 037 (R 2)] (voir p.15)

Plan du rapport

Le chapitre 1 de l'étude donne une vue d'ensemble des marchés du Royaume-Uni pour les produits de pêche comestibles et identifie dans chacune des principales catégories de produits les domaines qui présentent un intérêt particulier, notamment celui des fournisseurs dans les pays en voie de développement. Chacun de ces domaines d'intérêt est ensuite commenté plus en détail dans les chapitres 2 à 5 dans les contexte des principales catégories de produits, qui sont représentées par ordre d'importance pour les fournisseurs actuels et potentiels dans les pays en voie de développement. Le rapport se termine par un chapitre traitant des prix, des réglementations commerciales et des moyens qui s'offrent aux exportateurs des pays en voie de développement de prendre une place sur le marché.

Les marchés du Royaume-Uni

Les marchés du Royaume-Uni pour les produits de pêche comestibles sont approvisionnés en premier lieu par la pêche du pays lui-même qui, en 1982, a été d'environ 775.000 tonnes. Cependant, le commerce est aussi considérable avec, en 1982, des exportations de 260.000 tonnes et des importations correspondantes de 325.000 tonnes (voir p. 17).

Les niveaux de consommation sont difficiles à établir compte tenu des degrés différents de transformation avant la consommation finale des produits finis, mais en 1982 les quantités des principaux produits ont été les suivantes:

- poisson frais/congelé—65.000 tonnes
- poisson et crustacés en conserve—55.000 tonnes

* SITC (R2) = Standard International Trade Classification, deuxième révision

- crustacés frais/traités—10.000 tonnes
- poisson séché/fumé—probablement moins de 10.000 tonnes (voir p.15)

La part de contribution des importations à la couverture des besoins du marché du Royaume-Uni est influencée par le niveau variable de la pêche pratiquée dans le pays même. Les goûts des consommateurs, en particulier ceux se rapportant aux espèces de poisson bien établies, sont également d'une importance majeure dans la composition des importations (voir p.15).

Les pays en voie de développement ont pu pénétrer à des degrés variables sur les marchés des quatre catégories de produits identifiées, les volumes et les valeurs ayant été en 1982 les suivants:

	% du volume total des importations
— poisson frais/congelé: 2.000 tonnes, £1,9 million	0,9
— poisson et crustacés en conserve: 25.700 tonnes, £34,3 millions	30,2
— crustacés frais/traités: 7.500 tonnes, £21,4 million	41,7
— poisson séché/fumé: 150 tonnes, £0,4 million	5,0

(voir p.20)

Poisson frais/congelé

Le marché d'importation le plus important est celui du poisson frais/congelé qui, en 1982, a représenté 220.000 tonnes, évaluées à £194 millions. Ces importations comprennent essentiellement des espèces de poisson à chair blanche, traditionnellement préféré, là où la pêche indigène est insuffisante pour satisfaire la demande. Pratiquement tous ces approvisionnements viennent des pays d'Europe et d'Amérique du Nord avec accès aux pêcheries de l'Atlantique Nord (voir p.37 et 38).

La place limitée prise par les exportateurs des pays en voie de développement sur ce marché s'explique en premier lieu par le nombre restreint des espèces demandées et la facilité des approvisionnements en provenance des pays européens et nord-américains, en particulier. Même là où les pays en voie de développement pourraient fournir des espèces qui sont complémentaires sur le pland des qualités organoleptiques, une remise considérable sur les prix serait nécessaire pour prendre une place sur le marché. La facilité avec laquelle il est possible de se procurer les espèces exactement souhaitées fournit peu de motifs de rechercher d'autres alternatives, même si les prix de ces espèces de remplacement sont bas. (voir p.40).

La part la plus importante du marché couverte par les pays en voie de développement est celle des espèces 'exotiques' spéciales. Elle représente 85% des exportations actuelles de poisson frais/congelé des pays en voie de développement vers le Royaume-Uni mais, en comparaison du marché global de poisson frais/congelé, les volumes et les valeurs sont très peu élevés. L'accroissement des marchés exotiques n'a pas été très important et, par voie de conséquence, les perspectives de marchés ont été très réduites pour les exportateurs des pays en voie de développement (voir p.42).

Poisson et crustacés en conserve

Le deuxième marché par ordre d'importance est celui du poisson et des crustacés en conserve; en 1982, il a été de 85.000 tonnes, évaluées à £162 millions. La production indigène de produits en conserve est faible (environ 15% du volume des importations) et, tandis que certains produits importés sont bien établis, d'autres, notamment le thon, sont devenus significatifs pendant les années 70. Pour les espèces établies telles que le saumon, les fournisseurs nord-américains sont particulièrement importants, tandis que d'autres espèces comprenant le thon et les sardines sont en partie fournies par un grand nombre de pays en voie de développement (voir p.22 et 23).

Le poisson et les crustacés en conserve représentent le plus important marché de produits en provenance des pays en voie de développement. Le thon représente le plus important marché de produits de cette origine et l'accroissement de la consommation, d'après des sources commerciales, a été estimé à près de 10% par an (voir p.24).

La demande pour un certain nombre d'autres espèces, notamment les sardines et les pilchards, a été en partie satisfaite par des exportateurs de pays en voie de développement pendant de nombreuses années, mais les niveaux de consommation de ces produits sont restés stationnaires et le nombre de pays capables de couvrir les besoins du marché est limité. Les crabes, les crevettes et les bouquets représentent des marchés moins importants; leur consommation a augmenté mais de façon assez irrégulière (voir p.26).

Crustacés frais/traités

Les crustacés frais/traités sont relativement moins importants en comparaison des deux catégories de produits précédentes; en 1982, le volume d'importation a été de 18.000 tonnes, évaluées à £45 millions. Les importations se limitent en grande partie aux crevettes et aux bouquets car la demande du marché pour d'autres espèces de crustacés (et mollusques) est très largement couverte par la pêche du Royaume-Uni; en fait, le pays est un net exportateur de nombreux produits (voir p.31 et 32).

Les importations proviennent de nombreux pays, y compris des pays en voie de développement qui fournissent essentiellement des crevettes et bouquets de mers chaudes (voir p.33).

Les crevettes et les bouquets représentent le deuxième marché par ordre d'importance (après les produits en conserve) pour les exportateurs des pays en voie de développement. Le marché pour les espèces de mers froides et de mers chaudes a augmenté dans l'ensemble d'environ 5% par an; par suite des déficits à la fois de la pêche au Royaume-Uni et des approvisionnements en provenance d'autres producteurs d'espèces de mers froides, on a assisté à une expansion tout à fait spectaculaire des importations provenant des pays en voie de développement au cours des cinq derniéres années jusqu'en 1982 (voir p.34)

Poisson séché/fumé

La dernière catégorie de produits importés, celle du poisson séché/fumé, est d'une importance secondaire représentant, en 1982, 3,000 tonnes en volume évaluées à £3 millions. A cause des faibles volumes importés, on ne dispose que de peu de détails sur le commerce de ces produits, mais les pays en voie de développement n'y jouent qu'un faible rôle (voir p.48 et 49).

La demande est largement couverte par la production indigène et le Royaume-Uni est un net exportateur de nombreux produits.

Perspectives pour de nouveaux exportateurs des pays en voie de développement

Les meilleurs marchés potentiels pour de nouveaux exportateurs des pays en voie de développement sont ceux des produits en conserve, en seconde place ce sont ceux ders crustacés frais et traités. Les possibilités en ce qui concerne les deux autres catégories de produits, le poisson frais/congelé et le poisson séché/fumé, sont très restreintes en particulier pour la dernière catégorie.

Parmi les produits en conserve, le marché du thon constitute la meilleure possibilité, la demande des consommateurs continuant à augmenter, selon les prévisions, à raison de 10% par an dans le contexte de défaillance de nombreux pays assurant habituellement cet approvisionnement. Les marchés de pilchards et de sardines en conserve peuvent offrir quelques possibilités limitées mais on s'attend à ce que la demande du marché reste stationnaire ou même diminue, et les exigences concernant les espèces limitent le nombre de fournisseurs potentiels parmi les pays en voie de développement. Les crevettes, les bouquets et les crabes en conserve représentent des marchés peu importants, mais les valeurs unitaires sont élevées et on s'attend à une augmentation, bien que modeste, de la demande des consommateurs (voir p.29).

Parmi les crustacés frais/traités, les crevettes et bouquets congelés représenteront facilement le meilleur (en fait pratiquement le seul) marché pour de nouveaux fournisseurs. On s'attend à ce que la damande des consommateurs continue à augmenter, les valeurs unitaires sont élevées et les approvisionnements sont réduits en provenance d'un certain nombre de pays fournissant habituellement des espèces de mers froides et de mers chaudes. Il n'existe pratiquement pas de possibilités sur d'autres marchés de crustacés et de mollusques frais ou traités (voir p.36).

Des possibilités auxiliaires peuvent se présenter pour de nouveaux fournisseurs de poisson exotique congelé, mais les marchés pour les différentes espèces ne sont pas très importants, les valeurs unitaires ne sont généralement pas très favorables et on s'attend à ce que l'accroisement de la demande reste limité. Les possibilités sur d'autres marchés de poisson frais/congelé sont en principe très limitées (voir p.46).

Il n'existe pratiquement pas de perspectives du tout pour de nouveaux exportateurs des pays en voie de développement sur les marchés de produits de pêche séchés/fumés (voir p.51).

Structure commerciale

En ce qui concerne les importations en provenance des pays en voie de développement, la structure du commerce dans le Royaume-Uni peut être grossièrement divisée en commerce se rapportant au poisson frais/congelé, aux crustacés frais/traités et au poisson séché/fumé et en commerce se rapportant aux produits en conserve. Les importateurs et les entreprises de transformation s'occupant des trois premières catégories de produits ont tendance à se superposer. En particulier, les compagnies s'occupant du marché des crevettes, de loin le produit le plus important de la catégorie, s'occupent aussi plus ou moins secondairement des importations de poisson. (voir p.52 et 53).

Des compagnies relatiement peu nombreuses s'occupent de la majeure partie des importations des produits en conserve provenant des pays en voie de développement. Des importateurs et des acheteurs de moindre importance sont plus nombreux à s'occuper ensemble de l'importation directe par des cricuits de commerce de détail par l'intermédiaire d'acheturs centraux. Les compagnies de moindre importance sont généralement moins strictes quant à l'acceptation de fournitures d'un grand nombre de pays en voie de développement tandis que certaines firmes plus importantes préfèrent développer des approvisionnements à plus long terme assurés par des producteurs établis (voir p.52).

Un groupe différent de compagnies s'occupe des importations d'autres produits de pêche. Un petit groupe de firmes de moyenne importance est spécialisé dans l'importation et le traitement ultérieur de crevettes et de bouquets. Des importateurs de moindre importance plus nombreux ont une activité commerciale mais entreprennent rarement la transformation. Les deux groupes s'occupent souvent d'importations de poisson exotique, à la fois frais/congelé et séché/fumé, bien que cette dernière catégorie soit en fait très limitée. Dans un petit nombre de cas, parmi les importateurs de moindre importance, le poisson représente le poste traité le plus important (voir p.53).

Réglementations du commerce

Les réglementations du commerce sont particulièrement importantes pour tous les postes couverts par l'étude étant donné que ces produits sont destinés à la consommation humaine. Au Royaume-Uni, les réglementations en ce qui concerne les spécifications de qualité et de manutention et les réglementations concernant la santé sont strictes et le fait de ne pas satisfaire à ces réglementations a un effet extrêmement défavorable sur la réputation des fournisseurs et leur faculté de prendre une place sur le marché dans l'avenir. Tous les produits sont soumis au contrôle douanier par les services de santé portuaires et ne peuvent être vendus sans avoir reçu l'approbation (voir p.55).

Droits d'importation

Les droits applicables aux produits de pêche comestibles varient très largement. Les pleins tarifs sont les plus élevés pour les produits en conserve, étant généralement d'environ 25%, à l'exception du sumon. Les droits pour les crustacés frais ou traités peuvent atteindre 18% tandis que ceux sur d'autres postes vont jusqu'à 15% (voir p.58).

Cependant, les pays en voie de développement ont des statuts différents, soit ceux des pays d'Afrique, des Antilles et du Pacifique (ACP), des pays et territoires d'Outre-mer (OCT) ou des pays en voie de développement le moins industrialisés (LDDC). Les pays ACP et OCT obtiennent une exonération totale des droits sur tous les produits de pêche comestibles tandis que les pays LDDC obtiennent une exonération sur la majorité des produits. Dans l'ensemble, les effets des tarifs douaniers imposés aux pays en voie de développement sont par conséquent très limités (voir p.58).

Fixation des prix

La fixation des prix des produits de pêche comestibles varie dans une très large mesure, en partie à cause du grand nombre de différents produits entrant dans chaque catégorie et également à cause de facteurs saisonniers et d'autres facteurs liés aux marchés. Au cours de la période de 1977 à 1979, les prix du poisson ont augmenté plus rapidement que ceux de la viande et des produits de boucherie, mais par la suite ils ont augmenté bien plus lentement, à la fois en comparaison de ceux de la viande et des produits de boucherie et de ceux des produits alimentaires en général (voir p.59).

A l'intérieur du groupe des produits de pêche, un certain nombre de postes, pour lesquels les pays en voie de développement sont des fournisseurs actuels ou potentiels, sont d'une valeur relativement élevée, tout spécialement les crevettes et bouquets congelés, suivis du crabe et des crevettes en conserve et du poisson en conserve, en particulier le thon (voir p.59).

Conduites à tenir pour de nouveaux exportateurs de pays en voie de développement

En partie en raison de l'existence de réglementations rigoureuses, la plupart des grandes compagnies d'importation offrent leurs conseils aux nouveaux fournisseurs potentiels. Dans de nombreux cas, les compagnies vont plus loin et exigent de pouvoir procéder à une inspection de fait de l'usine des fournisseurs afin de vérifier la qualité des opérations avant d'accepter les fournitures. Les importateurs de moindre importance peuvent être moins exigeants en ce qui concerne l'acceptation de livraisons de nouveaux fournisseurs mais ils veillent néanmoins à s'assurer que les réglementations et les exigences de santé sont satisfaites (voir p.62).

Pour réussir à prendre une place sur les marchés, il est fortement recommandé aux nouveaux exportateurs de faire preuve d'une coopération étroite en remplissant les exigences stipulées par les importateurs. Une attention particulière doit être accordée à la fixation de prix compétitifs, au contrôle de qualité et à la planification des livraisons. Les conduites à tenir pour de nouveaux fournisseurs sont exposées dans le chapitre 6 at une liste d'importateurs et de points de contact est donné en Annexe 7.

RESUMEN

Mercados en el Reino Unido para productos de pescado comestibles, especialmente los procedentes de países en vías de desarrollo

Este informe trata sobre los mercados existentes en el Reino Unido para productos de pescado comestibles, con referencia especial al potencial ofrecido por los procedentes de países en vías de desarrollo. Las principales categorías de productos—identificadas a base su clasificación commercial—son las siguientes:

- Pescado fresco/congelado (SITC*034(R2))
- Pescado seco/ahumado (SITC 035(R2))
- Crustáceos frescos/elaborados (SITC 036(R2))
- Crustáceos y pescado enlatados (SITC 037(R2)
(Ver la página 15)

Estructura del informe

En la Sección 1 del estudio se ofrece un resumen de los mercados existentes en el Reino Unido para productos de pescado comestibles, y se identifican aquellos sectores dentro de cada categoría principal de producto que ofrecen un interés especial, haciendo referencia particular a los proveedores procedentes de países en vías de desarrollo. Cada uno de estos sectores de interés se analiza luego de modo más detallado en las Secciones 2—5 en el contexto de categorías principales de productos, las cuales son presentadas por orden de importancia a los proveedores existentes y potenciales en países en vías de desarrollo. El informe termina con una sección dedicada a la fijación de precios, las regulaciones y los procedimientos comerciales para que los exportadores de los países en vías de desarrollo puedan entrar en el mercado.

El mercado del Reino Unido

Los mercados del Reino Unido para productos de pescado comestibles son abastecidos principalmente por la pesca local, cuyo volumen en 1982 ascendió a unas 775.000 toneladas. No obstante, el comercio es también importante con exportaciones en 1982 de 250.000 teonladas y volúmenes de importación correspondientes de 325.000 toneladas. (Ver la página 17)

Los niveles del consumo son difíciles de evaluar, debido a los diferentes niveles de elaboración antes del consumo final de los productos definitivos. No obstante, los niveles approximados correspondientes a los productos principales en 1982 fueron los siguientes:

- Pescado fresco/congelado: 65.000 tonneladas
- Crustáceos y pescado enlatados: 55.000 toneladas
- Crustáceos frescos/elaborados: 10.000 toneladas
- Pescado seco/ahumado: probablemente menos de 10.000 toneladas. (Ver la página 15)

El nivel variable de la pesca en el Reino Unido afecta la misiòn que tienen las importaciones en satisfacer la demanda del mercado del Reino Unido. Los gustos del consumidor, especialmente los referentes a las especies de pescado bien establecidas en el mercado, tienen también gran importancia al determinar la composición de las importaciones. (Ver la página 15)

Los países en vías de desarrollo han conseguido varios niveles de penetración en el mercado de los cuatro productos identificados, siendo los volúmenes y valores correspondientes a 1982 los siguientes:

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*, SITC (R2) Clasificación Comercial Internacional Standard, Segunda Revisión

	% del total del valor de importaciones
— Pescado fresco/congelado: 2.000 toneladas; 1,9 milliones de libras	0,9
— Crustáceos y pescado enlatado: 25.700 toneladas; 34,3 millones de libras	30,2
— Crustáceos frescos/elaborados: 7.500 toneladas; 21,4 millones de libras	41,7
— Pescado seco/ahumado: 150 toneladas; 0,4 millones de libras esterlinas	5,0

(Ver la página 20)

Pescado fresco/congelado

El mercado más importante corresponde al pescado fresco/congelado, el cual en 1982 ascendió a 220.000 toneladas por un valor de 194 millones de libras esterlinas. Dichas importaciones en su mayoría comprenden las especies de pescado blanco tradicionalmente preferidas cuya pesca local no es suficiente para satisfacer la demanda. Prácticamente todos los suministros de este pescado provienen de países europeos y norteamericanos que tienen acceso a los cotos pesqueros del Atlántico Norte. (Ver las páginas 37 y 38)

La limitada penetración de los proveedores procedentes de países en vías de desarrollo se explica principalmente mediante el número limitado de las especies requeridas y de la fácil disponsibilidad de suministros procedentes de los países europeos y norteamericanos en particular. Aun en el caso de que los países en vías de desarrollo pudieran suministrar especies que son complementarias en el sentido de su calidad organoléptica, sería necesario un considerable descuento en el precio para conseguir penetrar el mercado. La fácil disponibilidad de las especies deseadas en sí ofrece poco incentivo para buscar otras alternativas, aun cuando éstas sean de bajo precio. (Ver la página 40)

El sector más importante del mercado abastecido por los países en vıás de desarrollo es el de las especies 'exóticas' especiales. Este sector representa un 85% del total actual de exportaciones de pescado fresco/congelado de los países en vías de desarrollo al Reino Unido, pero en comparación con el mercado del pescado fresco/congelado en su totalidad, los volúmenes y valores son muy pequeños. El aumento del mercado para especies exóticas no ha sido muy importante, y como resultado de ello, los proveedores en los países en vías de desarrollo se han enfrentado con unas perspectivas de venta sumamente limitadas. (Ver la página 42)

Crustáceos y pescado enlatados

El segundo mercado más importante de importación es el de crustáceos y pescado enlatados, el cual en 1982 ascendió a 85.000 toneladas por un valor de 162 millones de libras. La producción local de conservas es pequeña (un 15% por el volumen de importaciones), y si bien algunos productos están bien establecidos, otros—particularmente el atún—han disminuido en popularidad durante la década de los años setenta. Para las especies establecidas tales como el salmón, los abastecedores norteamericanos son particularmente importantes, mientras que las otras especies tales como el atún y el arenque son parcialmente suministradas por un gran número de países en vías de desarrollo. (Ver las páginas 22 y 23)

Los crustáceos y pescado enlatados representan el mercado mayor para productos originarios en países en vías de desarrollo. El atún representa el mercado de producto individual mayor procedente de dichos orígenes, ye el aumento en el consumo ha sido calculado por organismos comerciales en un 10% anual. (Ver la página 24)

La demanda de cierto número de otras especies, particularmente la de sardinas y arenques, ha sido satisfecha parcialmente por abastecedores procedentes de países en vías de desarrollo durante muchos años, pero los niveles de consumo de estos productos han permanecido estáticos, y el requerimiento de las especies limitan el número de países capaces de satisfacer la demanda del mercado. El cangrejo, el camarón y la gamba representan mercados de pequeña escala cuyo consumo ha aumentado, si bien de manera desigual. (Ver la página 6)

Crustáceos frescos/elaborados

Los crustáceos frescos/elaborados son relativamente menos importantes en comparación con las dos categorías de productos arriba indicadas, con volúmenes de importación de 18.000 toneladas valoradas en 45 millones de libras esterlinas en 1982.

Las importaciones están limitadas en su mayor parte al camarón y la gamba, ya que el mercado para as otras especies de crustáceos (y moluscos) es abastecido en su inmensa mayoría por la pesca del Reino Unido, siendo en realidad el país un exportador neto de numerosos productos. (Ver las páginas 31 y 32)

Las importaciones son suministradas por una amplia variedad de países, incluyendo aquellos en vías de desarrollo, los cuales suministran principalmente especies de camarones y gambas de aguas cálidas. (Ver la página 33)

El camarón y la gamba representan el segundo mercado más importante (después de los productos enlatados) para los abastecedores en países en vías de desarrollo. El mercado para las especies de aguas frías y cálidas ha aumentado en un 5% anual, y las escaseces experimentadas tanto en la pesca doméstica como por otros productores de especies de aguas frías, han resultado en una expansión bastante dramática de las importaciones procedentes de países en vías de desarrollo durante los cinco años precendentes a 1982. (Ver la página 34)

Pescado seco/humado

La categoría final de importaciones—pescado seco/ahumado—representa una importancia marginal y comprende un volumen de 3.000 toneladas valoradas en 3 millones de libras en 1982. Debido a los pequeños volúmenes involucrados, se ofrecen disponibles pocos detalles comerciales, pero los países en vías de desarrollo contribuyen co una parte muy pequeña. (Ver las páginas 48 y 49)

La demanda es cubierta en su mayoría por la producción local, y el Reino Unido es un exportador neto de muchos productos.

Perspectivas para nuevos abastecedores de países en vías de desarrollo

Los mejores mercados potenciales para nuevos abastecedores de países en vías de desarrollo son para los productos enlatados, seguido de crustáceos frescos/elaborados. El potencial para las otras dos categorías de productos— pescado fresco/congelado y pescado seco/ahumado—es muy limitado, especialmente para el último mencionado.

Entre los productos enlatados, el mejor potencial lo ofrece el mercado del atún, con la demanda del consumidor prevista en aumento continuo a un 10% anual, al haberse producido escaseces de suministro entre muchos de los países abastecedores actuales. Los mercados del arenque y la sardina enlatadas pueden ofrecer ciertas oportunidades limitadas, pero se espera que la demanda permanezca estática o incluso disminuya, y los requerimientos de las especies limitan el número de abastecedores potenciales en los países en vías de desarrollo. El camarón, la gamba ye el cangrejo enlatados representan mercados de pequeño tamaño, pero los valores unitarios son altos y se espera que aumente la demanda del consumidor, si bien a un ritmo moderado. (Ver la página 29)

Entre los crustáceos frescos/elaborados, los camarones y las gambas congeladas representan fácilmente el mejor (en realidad prácticamente el único) mercado de productos para nuevos abastecedores. El aumento en la demanda del consumidor se espera que continúe. Los valores unitarios son altos y los suministros están restringidos procedentes de cierto número de países abastecedores actuales de especies tanto de aguas frías como cálidas. Prácticamente no existen oportunidades en otros mercados de crustáceos y moulscos frescos/elaborados. (Ver la página 36)

Pueden surgir oportunidades marginales para nuevos abastecedores de pescado exótico congleado, pero los mercados para las especies individuales son sumamente pequeños, los valores unitarios no son generalmente muy atrayentes, y el aumento de la demanda se espera permanezca limitado. Las oportunidades de mercados para otras ventas de pescado fresco/congelado son con toda probabilidad sumamente limitadas. (Ver la página 46)

Prácticamente no existen perspectivas algunas para nuevos abastecedores de países en vías de desarrollo en mercados para productos de pescado seco/ahumado. (Ver la página 51)

Estructura comercial

Referente a las importaciones procedentes de países en vías de desarrollo, la estructura comercial del Reino Unido puede ser dividida aproximadamente entre aquello relacionado con el pescado fresco/congelado, los crustáceos frescos/elaborados y el pescado seco/ahumado, y aquello relacionado con los productos enlatados. Los importadores y elaboradores que se encargan de las tres primeras categorías de productos tienden a coincidir parcialmente. En particular, las empresas dedicadas al camarón y la gamba—con toda seguridad el producto más importante dentro del grupo—también se encargan normalmente de importar pescado como actividad más o menos marginal. (Ver las páginas 52 y 53)

Un número relativamente reducido de empresas se encarga de comerciar la mayoría de las importaciones de productos enlatados provenientes de países en vías de desarrollo. Un número mayor de importadores de pequeña envergadura y agencias de compras se hallan también involucrados en esta actividad, junto con cierta cantidad de importación efectuada directamente por una gran cadena de tiendas de venta al por menor a través de agencias de compra centrales. Las empresas de pequeña envergadura son generalmente más flexibles en lo que refiere a la aceptación de suministros procedentes de una gama mayor de países en vías de desarrollo, mientras que algunas firmas de gran envergadura prefieren desarrollar suministros a un plazo más largo procedentes de productores establecidos. (Ver la página 52)

Un grupo diferente de compañías se encarga de las importaciones de otros productos de pescado. Un pequeño grupo de firmas de tamaño mediano se especializa en la importación y elaboración ulterior de camarones y gambas. Un número mayor de importadores de pequeña envergadura se hallan activos en la elaboración pero pocas veces la llevan a cabo. Ambos grupos con frecuencia se encargan de la importación de pescado exótico, tanto fresco/congelado como seco/ahumado, si bien los de este último son sumamente limitados. En una pequeña cantidad de casos, entre los importadores de pequeña envergadura, el pescado constituye el producto más importante comericalizado. (Ver la página 53)

Regulaciones comerciales

Las regulaciones comerciales son particularmente importantes para todos los productos analizados en el estudio, ya que son destinados para el consuma humano. Las regulaciones del Reino Unido referentes a las especificaciones de calidad y manejo, así como las regulaciones sanitarias, son estrictas y si no son complidas acarrean un efecto extremadamente adverso para las reputaciones de los abastecedores y la futura posibilidad de penetrar el mercado. Todos los productos están sujetos a la franquicia de las autoridades sanitarias portuarias, y no podrán ser vendidos a menos que hayan obtenido aprobación. (Ver la página 55)

Derechos de importación

Los derechos aplicables a los productos de pescado comestibles varían muy considerablemente. Las tarifas máximas se aplican a los productos enlatados, siendo generalmente de un 25%, con la excepción del salmón. Los crustáceos frescos/elaborados han de pagar niveles de derechos hasta un 18%, mientras que los aplicables a los demás productos fluctúan hasta un 15%. (Ver la página 58)

No obstante, la mayoría de los países en vías de desarrollo tienen estado clasificado como ACP (países de Africa, el Caribe y el Pacífico), OCT (Territorios y Países de Ultramar) o LDDC (Países en Vías de Desarrollo a Nivel Mínimo). Los países clasificados ACP y OCT están totalmente exentos de impuestos para todos los productos de pescado comestibles, mientras que los clasificados LDDC están exentos de impuestos en lo que refiere a una mayoría de productos. En términos generales, los efectos de los aranceles sobre los países en vías de desarrollo son por lo tanto astante limitados. (Ver la página 58)

Fijación de precios

La fijación de precios para los productos de pescado comestibles varían de manera muy considerable, parcialmente debido al gran número de productos diferentes incluidos en el grupo, y también debido a las épocas del año y a otros factores del mercado. Durante el período de 1977-79, los precios del pescado ascendieron a un ritmo más rápido que los aplicables a la carne y productos de la carne, pero desde entonces han incrementado a un ritmo considerablemente más lento, tanto en comparación co la carne y los productos de la carne como en comparación con los productos alimenticios en conjunto. (Ver la página 59)

Dentro del grupo de productos de pescado existe cierto número de variedades abastecidas actual o potencialmente por los países en vías de desarrollo que son de un valor relativamente elevado, particularmente el camarón y la gamba congeladas, seguidos de cangrejo y camarón enlatado y de pescado enlatado, especialmente de atún. (Ver la página 59)

Procedimientos aplicables a los nuevos proveedores de países en vías de desarrollo

En parte debido a la existencia de regulaciones estrictas, la mayoría de las empresas importadoras de envergadura ofrecen asesoramiento a los posibles nuevos abastecedores. En muchos casos, las empresas requieren incluso una visita efectiva a la planta del abastecedor para verificar la calidad de las operaciones antes de aceptar los suministros. Los importadores de menor envergadura pueden ser más flexibles en lo que refiere a la aceptación de envíos procedentes de nuevos proveedores, pero se cuidan no obstante de asegurar que se cumplan las regulaciones y requisitos de sanidad. (Ver la página 62)

A fin de poder penetrar con éxito los mercados, se recomienda encarecidamente a los nuevos abastecedores que cooperen estrechamente en el cumplimiento de los requerimientos estipulados por las empresas importadoras. Se requiere una atención particular referente a la fijación de unos precios competitivos, control de calidad y programación de las entregas. Los procedimientos aplicables a los nuevos abastecedores son identificados en la Sección 6, y se incluye una lista de importadores y puntos de contacto en el Anexo 7.

Section 1

Introduction: United Kingdom fisheries and markets for edible fish products

PRODUCT CATEGORIES COVERED BY THE STUDY

Edible fish products have been divided into four broad categories in this study, following the breakdown used in United Kingdom and international trade statistics, i.e.:

1 SITC (R2) 034 1 to 4: Fish, fresh, chilled and frozen, including fillets.
2 SITC (R2) 035 01 to 04: Fish, dried, salted or in brine, smoked.
3 SITC (R2) 036: Crustaceans and molluscs, fresh, chilled, frozen, in brine or dried, in shell or boiled in water.
4 SITC (R2) 037 1 to 2: Fish, crustaceans and molluscs, prepared or preserved.

For ease of presentation the above categories have been abbreviated in the text and tables of the study as follows:

1 Fish, fresh/frozen
2 Fish, dried/smoked
3 Crustaceans, fresh/processed
4 Fish and crustaceans, canned

The rationale for using trade classifications to distinguish broad categories of fish products is essentially one of convenience, since the study is particularly concerned with the role of imports in supplying United Kingdom markets and especially the role of imports of developing country origin.

Because the study is solely concerned with fish products for human consumption certain items have been excluded, i.e.:

- fishmeal (used for animal feed)
- fish and fish waste used in petfood
- live aquarium fish

Marine and freshwater mammals are also excluded.

MARKET PROFILE FOR EDIBLE FISH PRODUCTS

Consumption levels for major product categories together with total consumption of all edible fish products are shown in Table 1*. Overall consumption declined from the beginning of the 1970s until the middle of the decade, when a recovery is apparent. Nonetheless, 1982 consumption remains a little below the level in 1970, the same feature applying to individual product categories.

*A number of problems arise with data relating to consumption levels which are discussed fully in Appendix 1. This study uses three main sources for calculating consumption, i.e.:
1 Per capita consumption and population data
2 Production of fish products plus net trade
3 Information from fish trade sources

Table 1

United Kingdom consumption of edible fish products 1970 and 1977–82

'000 tonnes

	1970	1977	1978	1979	1980	1981	1982
Fish, fresh/frozen	380.7	297.2	307.7	329.7	344.6	350.6	365.5
Fish and crustaceans, canned	56.0	45.5	41.9	44.7	52.6	57.4	52.3
Crustaceans, fresh/processed	n.a.	5.8	7.4	7.4	9.1	7.5	10.0
Fish, dried/smoked	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Total	436.7	348.8	357.0	381.8	406.3	415.5	427.8

Notes: Consumption data derived by multiplying per capita levels by population
n.a. = not available

Sources: Per capita consumption data: *Business Monitor—Bacon Curing, Meat and Fish Products*, PQ214, 4th quarter 1982, HMSO 1983
Population data: *Annual Abstract of Statistics*, No. 120 CSO, HMSO, 1984 edition

The table shows that consumption for the largest product grouping, fresh/frozen fish, increased by 25% over the period 1977 to 1982, that is from 297,000 to 366,000 tonnes. The grouping includes fresh/chilled fish where consumption remained virtually static, and processed and frozen fish which each grew by a total of around 39% over the period 1977 to 1982. By 1982 frozen/chilled and processed fish each accounted for roughly 30% of the total.

Consumption of fresh/frozen fish is mainly composed of a few long-established species. Within the product group items include wet fish, frozen fillets and processed items such as breaded fillets and fish fingers together with more recently developed speciality products including fish in various sauces. Products from this group are largely used in main meals either at home or in the catering, fast food and restaurant trades.

For the second most important product group, canned fish and crustaceans, the recovery in consumption between 1977 and 1982 has been more irregular*, however 1982 levels are again a little below those achieved at the beginning of the 1970s, that is around 52,000 tonnes in 1982 compared to 56,000 tonnes in 1970.

Again, consumption is primarily dominated by a few well-established species used in salads, sandwiches, high teas and snacks.

Data for fresh/processed crustaceans may understate true consumption levels. Recent trends show a rapid if erratic expansion up to a total of 10,000 tonnes in 1982. (*see* Table 1). Many items within the product group, notably shrimp and prawn, are used in snacks, salads and in hors d'oeuvres in the restaurant trade.

No separate data are available for dried/smoked fish consumption; part of the data is included under fresh/frozen fish. However, levels are probably low in comparison to those for other groupings, and consumption is confined to a range of more-or-less speciality items.

A variety of factors may influence consumption levels including population and population growth, income levels and growth, relative pricing of competing products and consumer tastes. As a whole, United Kingdom markets for edible fish products have been most influenced by changing relative prices in the context of slowly growing real income levels. Population growth in the United Kingdom over the past decade has been virtually static and hence has exerted a minimal influence on consumption. Rising real incomes have had a small effect, but the rate of increase, a little below 2% per annum during the 1970s, has been relatively low. Consumer tastes relating to food products are generally characterised as conservative in the United Kingdom; however, some changes are evident, which

* *See* note on page 15

are also partly a response to market promotion, for example the rapid increase in shrimp and prawn consumption in recent years. The most important overall influence on edible fish product consumption has probably been the change in relative prices. In particular, fish product consumption is sensitive to relative price changes in comparison to meat products, and more broadly with food prices as a whole.

The decline in fish consumption up to the mid-1970s is largely explained by the rapid rise in fish prices, which increased more rapidly both compared to meat and meat products and to food products as a whole. The reversal of the consumption trend in the mid-1970s also corresponds broadly to a change in relative price inflation. Since the mid-1970s fish prices have usually risen less rapidly than those for food products as a whole and have been similarly compete- tive with meat and meat products since around 1979.

Consumption of meat and meat products remains very much larger than that for fish, at around 3.19 million tonnes in 1982. Meat and meat products consumption increased from 1977 to 1979, but thereafter fell back such that 1977 and 1982 levels are closely similar. Recent weakening in consumption may be attributable in part to rapidly rising price levels since 1979. In contrast the consistent expansion in fish consumption since 1977 has resulted in an improvement in its relative importance, from around 11% of meat consumption levels in 1977 to over 13% in 1982.

Fish consumption is relatively high in comparison with other countries, for example United Kingdom consumption of fresh/frozen fish per capita is above the levels in France and Italy and three times that of the USA. Consumption of crustaceans and canned products is however generally lower in the United Kingdom than in other developed countries, partly because of the ready availability of fresh/frozen fish items.

The relative importance of major product categories is not expected to change substantially in future. Fresh/frozen fish will remain the major category, primarily because of their ready availability. Partly as a consequence, consumption of canned fish, though remaining fairly large, is not expected to increase in import- ance in comparison to fresh/frozen fish. These two major product groupings serve rather different markets, with fresh/frozen fish used in main meals either in the home, restaurants or the catering trade, while canned products represent more of a snack/convenience item. Consumption levels of the two other product categories—fresh/processed crustaceans and especially of dried/smoked fish are expected to remain relatively small.

The most dynamic segments of the United Kingdom market for edible fish products are expected to be processed and frozen fish within the fresh/frozen fish group, canned tuna amongst canned items, and shrimp and prawn amongst fresh/processed crustaceans. It is the latter two items which provide the best prospects for developing country suppliers. Overall sources of supply to the United Kingdom discussed in the following sub-sections.

SOURCES OF SUPPLY OF EDIBLE FISH PRODUCTS

The United Kingdom fish catch

The United Kingdom is a major fishing nation with substantial domestically landed catches of both wet fish and shellfish. In contrast, freshwater fisheries are generally much less significant. For a variety of reasons however, the United Kingdom fish catch has declined over the past decade, particularly since 1978, although a slight recovery was evident in 1982. Major reasons for this decline include:

1 Exclusion of British vessels from traditional fishing grounds, especially in distant waters, for example around Iceland as a result of the imposition of Exclusive Economic Zones (EEZs);

2 partly as a corollary to (1), the decline in fish stocks and associated catch from home waters as a result of over fishing; and

3 the continuing access of foreign vessels, notably of EC countries to United Kingdom, although foreign vessels are now controlled under the EC Common Fisheries Policy.*

The scale of the decline in catch is illustrated in Table 2 with a total of over 900,000 tonnes in 1977 falling to 745,000 tonnes in 1981, although some recovery to 775,000 tonnes was apparent in 1982. The decline in catch applies both to wet fish and to the smaller shellfish sector.

Table 2

United Kingdom catch‡ of wet fish and shellfish 1970 and 1977–82

'000 tonnes

	1970	1977	1978	1979	1980	1981	1982
Wet fish	918.6	838.7	887.5	771.8	689.0	681.0	709.7
Shellfish	56.4	77.6	69.0	64.4	70.0	64.4	64.9
Total	975.0	916.3	956.5	836.2	759.0	745.4	774.6

Notes: ‡Catch landed by British vessels

Sources: Sea Fisheries Statistical Tables, MAFF, HMSO

The major species† of wet fish landed include cod, haddock and whiting amongst demersal species and mackerel amongst pelagics. Demersal species of lesser importance include plaice and pollock. Up to 1980, catches of virtually all species except mackerel declined, but in 1981, and more especially, 1982, a recovery in catch of a number of species occurred whilst the mackerel catch declined sharply. Shellfish catches have fluctuated around a declining trend with a particularly sharp fall in 1981, levelling off in 1982.

The current (1982) upturn in the United Kingdom fish catch may indicate that conservation measures and the establishment of a common EC fishery policy are having, or will have some effect and could lead to continued recovery in future.

United Kingdom production of edible fish products

Only a proportion of the United Kingdom catch is utilised in the form of edible fish products. Quite substantial volumes are destined for other forms of utilisation, for example for fishmeal used in livestock feed and petfood. The petfood industry also utilises fish waste derived as a by-product of items for human consumption.

Production of fish products using classifications which correspond to trade groupings identified in *Product categories covered by the study*, p.15, are shown in Table 3. The data presented, however, excludes unprocessed items such as

Table 3

United Kingdom production‡ of edible fish products 1977–82

'000 tonnes

	1977	1978	1979	1980	1981	1982
Fish, frozen	173.0	173.6	178.8	164.8	166.5	171.3
Fish crustaceans, canned	18.7	19.1	18.4	15.7	13.2	11.5
Crustaceans, frozen	12.7	12.7	18.1	17.6	17.0	18.8
Fish, dried/smoked	32.7	26.7	15.1	8.5	6.9	5.7

Note: ‡Coverage is thought to account for 85% of the employment of all establishments classified in the industry

Source: *Business Monitors, Bacon Curing, Meat and Fish Products*, PQ214, 4th quarter 1982, HMSO 1983

* For an outline of the EC Common Fisheries Policy and its implications for the United Kingdom *see* Appendix 2
† For a full listing of species giving English and Latin names *see* Appendix 3

fresh and chilled fish and crustaceans, and in all product groups output levels are understated since they are derived only from establishments above minimum levels of scale.

Bearing in mind limitations of the data it is evident that frozen fish is easily the largest product group, at around 170,000 tonnes, whilst other categories are much smaller, i.e. frozen crustaceans at 19,000 tonnes, canned items at 12,000 tonnes and dried/smoked fish at 6,000 tonnes.

The level of production of frozen fish has been subject to fairly minor fluctuations over the peiod 1977—82, with no very clear trend apparent. Production levels at the beginning and end of the period are closely similar. Frozen fish production has not therefore followed the pattern of the United Kingdom fish catch to any discernible degree.

Production of frozen crustaceans has expanded quite significantly over the period as a whole; however over the past few years little change has been apparent. Canned products and dried/smoked fish both illustrate a declining trend, especially the latter.

Overall production of fish products does not generally reflect either trends in the United Kingdom catch on the one hand, or trends in consumption on the other. This lack of correlation is primarily explained by the importance of trade flows with an expanding role played in recent years by imported fish products.

Trade in edible fish products

Despite the decline in the United Kingdom fish catch and the uneven performance in production of edible fish products, exports as well as imports have both increased over the period 1977/82, although with significant year-on-year variations. Trade data are shown in Table 4. In the past two years the United Kingdom has become a net importer of wet fish after a short period of export surplus between 1978—80. Exports peaked in 1979 and thereafter fell away sharply whilst imports have also fallen slightly since a peak in 1980. The United Kingdom has also become a growing net importer of crustaceans since 1978.

Table 4

United Kingdom trade in edible fish products 1977—82

'000 tonnes

	1977	1978	1979	1980	1981	1982
Imports						
Fish, fresh/frozen	119.4	182.6	223.6	237.4	218.1	218.9
Fish and crustaceans, canned	70.8	56.4	69.0	80.9	100.3	84.8
Crustaceans, fresh/processed	8.5	15.5	17.0	19.1	15.9	18.7
Fish, dried/smoked	3.0	4.2	4.2	3.2	3.8	3.0
Total fish	181.9	230.7	294.5	307.1	304.7	290.2
Total crustaceans	19.8	28.0	29.3	33.5	33.4	35.2
Exports						
Fish, fresh/frozen	111.3	304.6	392.4	311.0	233.0	219.5
Fish and crustaceans, canned	12.4	13.2	13.1	14.2	12.7	13.5
Crustaceans, fresh/processed	24.4	24.1	22.3	27.9	27.5	27.2
Fish, dried/smoked	20.1	15.6	13.8	13.1	13.5	9.3
Total fish	142.8	332.3	418.0	336.4	256.4	239.6
Total crustaceans	25.4	25.2	23.6	29.8	29.9	29.9

Source: United Kingdom trade returns

Fresh/frozen fish is easily the most important category in both imports and exports. Exports show a very dramatic increase up to 1979 followed by a decline, but 1982 levels are still well above those in 1977. Imports have followed a somewhat similar pattern with expansion up to 1980 followed by a marginal decline. Comparing the beginning and end of the period 1979—82, trade in fresh/frozen fish is roughly in balance, but volumes have doubled.

Canned items are the second largest category, and show less dramatic changes than fresh/frozen fish. Exports have remained fairly stable, whilst a rising trend in imports is evident, although with erratic movements around the trend. Overall net imports of canned items have therefore registered a moderate increase over the period.

Exports of fresh/processed crustaceans have expanded only to a minor degree as in the case for imports with the exception of a sharp rise between 1977 and 1978. For the bulk of the period a fairly stable level of net exports has been typical. The smallest category, dried/smoked fish, shows declining net exports in the context of a stable very low level of imports and declining exports.

The pattern of fish catch, production of fish products and net trade do not immediately appear reconcilable, for example exports expanded during a period of declining catches and slowly rising domestic consumption. Such apparent paradoxes can be explained by a number of factors, for example the varying proportion of the domestic catch used for non-edible products and the export of species of fish where domestic demand is limited.

Easily the greater part of fish product imports are destined for consumption within the United Kingdom since re-exports are generally small. The bulk of imports comprise traditionally preferred major species where the domestic catch is no longer sufficient to meet demand.

In the case of fresh/frozen fish the major species include cod, haddock and plaice, whilst for canned fish, species include salmon, pilchards and sardines. Crustacean imports contain a large proportion of shrimp and prawn. In some cases fish products of developing country origin are from species which are sufficiently close to those traditionally preferred for penetration of markets to be possible. The latter comment applies particularly to shrimp and prawns and certain fish products, for example pilchards.

In addition to such 'traditional' species and close substitutes, import markets have developed for small volumes of 'exotic' species which are frequently of developing country origin or which could be supplied from such origins. Tuna, as a canned product, forms an exception, as an exotic species which is now well established in the United Kingdom with large volumes of sales.

The role of imports of developing country origin in supplying the United Kingdom market

United Kingdom imports of developing country origin by major product groupings are shown in Table 5. From the table it is clear that canned products and fresh/processed crustaceans are easily the most important items in value terms, whilst fresh/frozen and dried/smoked fish are relatively unimportant. This pattern of imports stems from the broad market features discussed above.

Table 5

United Kingdom imports of fish products of developing country origin, by volume and value 1977—82

	1977	1978	1979	1980	1981	1982
Volume ('000 tonnes):						
Fish, fresh/frozen	7.0	6.1	5.4	4.0	4.3	1.8
Fish, dried/smoked	0.2	0.1	0.1	0.1	0.1	0.2
Crustaceans, fresh/processed	1.2	2.2	3.1	4.4	5.0	7.5
Fish and crustaceans, canned	9.5	11.6	17.2	21.4	27.3	25.7
Value (£ million):						
Fish, fresh frozen	5.1	5.3	4.7	4.2	5.6	1.9
Fish, dried/smoked	0.3	0.3	0.3	0.3	0.3	0.4
Crustaceans, fresh/processed	3.5	5.0	8.4	9.0	12.6	21.4
Fish and crustaceans, canned	14.1	17.3	22.7	27.8	37.7	34.3

Source: United Kingdom trade returns

Fresh/frozen fish imports of developing country origin represent only 1% of total imports of the product group in 1982. This feature arises because the bulk of imports consists of a few major species supplied almost exclusively from European and North American countries with access to North Atlantic fisheries. Imports of developing country origin include small volumes of exotic species together with a hake sub-species which complements the domestic catch and European supplies. A substantial decline in hake imports accounts for the fall in volume shown in Table 5, also for a sharp fall in value in 1982.

Dried/smoked fish represents a very small import market overall and developing countries products accounted for only 7% of the total volume of imports in 1982. Limited penetration by developing countries is again the result of species composition of imports which primarily consist of North Atlantic herring and whitefish species supplied by European countries.

The two product groups where developing countries have achieved a significant level of penetration are for fresh/processed crustaceans and for canned products. The latter product group is the most important in both volume and value terms and represented a 30% share (by volume) of the total import market in 1982. In addition to a number of minor items, canned imports include large volumes of tuna, pilchards, sardines and some shrimps and prawns. The dynamism of the canned tuna market in particular has contributed to the rapid growth in imports shown in Table 5. The United Kingdom canned fish product market largely comprises species where the domestic catch is either wholely deficient or very small. Consequently considerable levels of imports have been required to meet market demand including products of developing country origin, but certain products/species, notably salmon, are primarily supplied from other origins.

The second most important product grouping for developing countries is fresh/processed crustaceans although their level of penetration of import markets is higher than that for canned fish, at around 38% by volume in 1982. The bulk of imports in this grouping is formed by shrimp and prawns, where developing countries have supplied increasing volumes of warm water varieties as a result of shortages in availability of traditionally preferred cold water species.

The markets for each major product category are discussed in more detail in the following sections, both in the context of the overall United Kingdom market and the role of imports, notably those of developing country origin. Since the primary aim of this study is to identify actual or potential markets for developing country suppliers, sections are presented in order of relative importance of each product category to these countries and the depth of coverage provided reflects the level of market interest, for example for canned products considerably more material is presented than in the case of dried/smoked fish.

Section 2

Canned fish and crustaceans

INTRODUCTION: MARKET PROFILE

The United Kingdom market for canned items is largely comprised of a number of fish products together with shrimp and prawns. Major species/products in volume terms are salmon, tuna, pilchards and sardines. Products of secondary importance include mackerel, kippers, shrimps and prawns and crabs, whilst a residual market comprising a fairly large numbr of speciality items exists. Consumption levels for individual products within this last group are small and species/products cover anchovies, lobster, herring*, cod roe, herring roe, various pâtés and certain smoked products. Most products are sold in a standard range of can sizes, types and packing medium (usually oil, tomato sauce or brine). The product grouping also includes a number of products pickled in jars and bottles which are generally of little significance.

As in the case for other food products, the United Kingdom consumer is often characterised as being conservative, but a number of changes have taken place recently in the composition of the market. These changes are covered in detail under individual products discussed separately in later sub-sections, but have been induced by a range of factors including availability and packing, promotion and upgrading, and relative pricing. The United Kingdom overall is radically different from other countries primarily because of long-established species preferences. Canned salmon is preferred to tuna, although consumption of the latter has been growing as a long-term trend, and sardines are confined to Mediterranean and Atlantic species (*see* Appendix 3). In other countries, tuna is often the major canned fish product whilst in the small fish market a variety of species fill the role played by sardines in the United Kingdom.

Canned fish products are not generally used in main meals although some recent market promotion has been directed towards this end, especially with regard to tuna. Such products are rather used as snack items, in high teas, sandwiches and salads. A degree of seasonality of consumption may exist, although the degree is disputed amongst trade sources, with salmon consumption peaking around Christmas and tuna during the summer months.

No fully satisfactory measure exists of the current scale and compositions of the United Kingdom canned fish and crustacean market. Problems of data are more fully discussed in Appendix 1 but the main problems may be summarised as follows:

- Official consumption data are only available for canned fish products as a whole with no disaggregation by individual products
- Net trade and production data include substantial stock holdings which, amongst other problems, distort the picture of apparent consumption
- Trade source information and estimates are not always based on full coverage of markets and in any case are often of limited availability.

* Including sild i.e. herring of Scandinavian origin marketed under the Scandinavian name

According to official consumption statistics and several trade sources total consumption of canned fish products in 1982 was in the region of 55,000 tonnes. A fairly constant upward trend in consumption is recorded from around 46,000 tonnes in 1977. Since most species involved in canned products markets are those where the United Kingdom catch is deficient, imports play a major role in supplying the market. However such species requirements also limit the degree to which developing countries can participate in a number of instances, since species availabilities are largely confined to developed countries in Europe and North America. The following sub-section examines the major sources of supply ot items in the product group, before turning to detailed market information relating to individual canned products.

SOURCES OF SUPPLY OF CANNED FISH AND CRUSTACEANS

Domestic production of canned fish and crustaceans in the United Kingdom is relatively small and has been declining for a number of years. A major factor contributing to this situation is the inadequacy of the domestic fish catch to meet the species and volume requirements of the market. United Kingdom production data are shown in Table 6 and indicate that total output has fallen from around 12,500 tonnes of canned products in 1977 to 4,600 tonnes in 1982. Mackerel and herring account fo the bulk of production, although mackerel canning has been subject to a particularly sharp decline. The United Kingdom also produces a modest volume of fish-paste items packed in jars with a very modest expansion in output evident over the period 1977—82 (Table 6).

Table 6

United Kingdom production† of canned and bottled fish and crustaceans 1977—82

tonnes

	1977	1978	1979	1980	1981	1982
Fish paste (in jars)	6,140	6,330	6,060	6,930	7,360	6,900
Canned fish	12,510	12,760	12,380	8,730	5,850	4,560
Total‡	18,650	19,090	18,440	15,660	13,210	11,460

Source: *Business Monitors—Bacon Curing, Meat and Fish Products,* PQ214, HMSO

Notes: †Production levels to nearest 10 tonnes
‡Coverage is thought to account for 85% of the employment of all establishments in the industry

As a result of limited domestic production, the greater part of the United Kingdom market is supplied by imports. Recent net trade in canned fish and crustaceans is shown in Table 7. Exports and re-exports are generally small, being confined largely to salmon, sardines and non-specified items. Some direct exports of home-produced mackerel have also occurred. In recent years total net imports have been in excess of 70,000 tonnes, which combined with domestic production of around 5,000 tonnes (for canned items only) suggests a total market size in excess of 75,000 tonnes. In fact consumption levels are probably only around 55,000 tonnes (*see Introduction: market profile*). The discrepancy is partly explained by changing stock levels, but more important, by the inclusion of a number of processed frozen products within the trade classification for canned items.

Despite the problems with net trade data it is evident that imports supply a very high proportion of the United Kingdom market for canned fish and crustaceans, extending over the whole range of species identified, with the partial exception of mackerel. Because of the uneven levels of stockholding both total net imports and those for individual species shown in Table 7 do not provide a reliable guide to market trends. Data in the table, particularly for major items, show substantial year-on-year variations whereas market demand trends are much more stable. Actual market trends derived from trade sources and the reasons for fluctuating import levels are discussed below under individual product categories. In essence such changes hinge upon changing consumer tastes, international price fluctuations, currency factors and the effects of health 'scares'.

Table 7

United Kingdom net imports of canned fish and crustaceans 1977–82

'000 tonnes

	1977	1978	1979	1980	1981	1982
Salmon	13,360	13,150	13,630	23,350	28,410	15,030
Pilchards	20,740	5,160	11,110	10,570	12,330	13,890
Tuna	6,520	6,580	9,320	9,120	17,590	12,380
Sardines	5,570	5,060	5,870	4,480	5,130	6,410
Mackerel	2,220	(270)‡	10	1,410	1,350	1,390
Shrimp and prawns	n.a.§	n.a.	630	1,210	900	1,260
Crab	420	440	680	1,210	1,090	1,100
Bonito	620	410	760	1,150	1,460	740
Brisling	540	310	830	540	250	380
Anchovies	290	260	250	270	310	260
Others/non-specified	8,060	12,040	12,710	13,490	18,840	18,420
Total	58,340	43,140	55,800	66,800	87,660	71,260

Source: United Kingdtom trade returns

Notes: †Imports minus exports to nearest 10 tonnes
‡Figures in brackets represent net exports
§n.a. = not available

INDIVIDUAL CANNED PRODUCT MARKETS

The following sub-sections examine individual canned product markets concentrating upon recent market trends and the current and potential role of developing country supplies in such markets.

Salmon

Canned salmon represent the largest single canned fish product market in the United Kingdom. The market is supplied exclusively from imports, which have varied between 13,000 and 28,000 tonnes in recent years (*see* Table 7). Fluctuation in imports stems partly from variation in stockholding; however, underlying levels of consumption have themselves varied as a result of a number of factors:

- Variable availability of supplies, especially from the North American catch, and rising consumption in supplying countries, notably Canada
- Competition from other canned fish and meat products, especially tuna, on price grounds
- Currency factors especially the exchange rate between the pound sterling and the US dollar, since salmon is priced in US dollars on the international market
- Effects of the economic recession in the United Kingdom
- Health scares, the most recent being an outbreak of botulism poisoning in Belgium in 1982

Of the factors listed above, health scares have easily been the most disruptive; for example, with the complete withdrawal of all 0.5 lb cans of US and Canadian origin from the market in February 1982. Recovery in market demand is however relatively rapid, partly as a result of heavy market promotions, a proportion of which is financed by organisations in supplying countries.

The major suppliers to the United Kingdom are the USA, Canada and the Soviet Union. Developing countries currently supply only minimal volumes on the basis of entrepôt trade (Appendix 1, Table I), however the importance to these countries of the canned salmon market is its dominant position and the competition it provides with other canned fish, notably tuna. The reason for such limited penetration by developing country suppliers arises from the species required for the market.

Three categories are distinguishable within the salmon market, that is: red, medium red and pink salmon. Unlike other countries red sockeye salmon is regarded as the leader in quality terms, followed by medium red, although the latter has a very small market share. Pink salmon is generally regarded as being of inferior quality, with consumption levels around one half of those for red salmon.

Current United Kingdom demand for canned salmon (excluding the effects of the botulism scare in 1982) is estimated by trade sources at around 2 million cases (or somewhat over 20,000 tonnes) per annum, or a little below 40% of the total United Kingdom market for canned fish. Trade expectations are that canned salmon demand will remain relatively stable. However, such expectations have to be tempered by the possibilities of future variations in supply and in currency factors.

Tuna

Consumption of canned tuna at around 1.2 million cases (approaching 12,000 tonnes), is around 60% of the level of that for salmon and roughly equivalent to that of canned pilchards. The market is again exclusively supplied by imports which exhibit an upward trend (*see* Table 7) in the context of year-on-year fluctuations, from around 6,500 tonnes in 1977 to over 12,000 tonnes in 1982. Imports however do not provide a very accurate picture of market demand as a result of changing stock levels, but according to trade sources a fairly consistent growth trend of around 10% per annum has existed in recent years.

In the past few years around 60% of imports has been supplied by developing countries (*see* Appendix 1, Table II). A large number of countries is involved, but Fiji, the Ivory Coast, the Philippines and Mauritius supplied over 80% of imports of developing country origin in 1982. Supplies from other origins are dominated by Japan. Small-scale suppliers are numerous but often enter the market for one or two years before dropping out. Long-established larger-scale suppliers include Fiji, the Ivory Coast, Mauritius and Japan, whilst the Philippines is a relatively recent entrant.

The recent growth performance of the United Kingdom tuna market can be attributed to a number of factors including:

- The young age group 'image' of the product, particularly in comparison to salmon, with consumption continuing once established
- The introduction of new products, for example, tuna packed in brine, and tuna chunks. The use of brine as a packing medium is promoted as a dietary factor and also assists greater flexibility in use, such as in cooked meals
- Market promotion
- Occasional upsurges in demand when salmon health scares have occurred

However a number of offsetting factors also arise:

- Some health scares have also arisen for tuna itself concerning histamine
- The United Kingdom economic recession may have had some dampening effect on demand
- Where supplies are priced in US dollars, similar exchange rate problems may arise to those applying to salmon

— Import duties on tuna are significantly higher than those for salmon, (e.g. GSP rates of 24% for tuna compared to 6.5% for salmon, (*see* Section 6, *Tariffs and quotas*). However most developing countries suppliers obtain duty-free status; tariff discrimination thus applies primarily to other suppliers especially Japan.

Within the canned tuna market several quality and product differentials exist, with differing growth potentials. Skipjack tuna packed in oil of Japanese origin is established as the top quality end of the market. However, limits to availability and consequent pressure on pricing have led to a degree to 'trading downward' in lower-quality markets, for example, tuna chunks packed in oil or brine. As a recently-introduced product, tuna packed in brine has proved popular and has achieved a 10% market share.

United Kingdom per capita consumption of tuna is relatively low, at around 0.5 kg per annum, compared to 1.1 kg in France and 3.0 kg in the USA. The relatively low levels of consumption are explained by the long-established large-scale consumption of salmon. However tuna consumption has expanded quite rapidly, partly at the expense of salmon, especially where health scares relating to the latter have occurred. Whilst salmon consumption is forecast to remain static, tuna consumption is expected to continue to grow at around 10% per annum at least. Market promotion could well lead to even higher growth rates.

Whilst growth in canned tuna demand may be subject to fluctuations as a result of features discussed earlier, it nevertheless represents an important current and potential market for developing country suppliers. Such countries may be well placed to supply increased market demand, particularly where they enjoy tariff advantages over non-developing countries. The United Kingdom trade is keen to exploit existing and new suppliers, since a fairly widely-held view is that shortage of supply rather than limits to market demand may inhibit expansion in the future.

Pilchards

Canned pilchard consumption estimated at around 1.2 million cases (around 12,000 tonnes) in 1982 is closely similar to that for canned tuna. Imports in the past few years have been reasonably stable in the region of 10—14,000 tonnes after severe fluctuations in 1977 and 1978 (*see* Table 7). The United Kingdom market is supplied by imports (although the Cornish pilchard industry has shown some signs of revival), and fluctuations have arisen in the past very largely as a result of fluctuations in catch/supply in countries of origin. The United Kingdom market was formerly supplied very largely by South Africa, but over-fishing resulted in the virtual disappearance of stocks around 1978. Consequently new suppliers, most notably Peru, together with Chile and Japan (*see* Appendix 1, Table III) have entered the market offering Pacific varieties and sold under the generic term 'Pacific pilchards'. Developing country suppliers accounted for 80% of United Kingdom supplies in 1982.

In contrast to the fairly dramatic changes on the supply side, market demand in the United Kingdom is characterised by trade sources as static. Such changes as have occurred are heavily influenced by supply, for example in periods of plentiful supply and low pricing demand expansion has occurred. The latter may include some substitution for salmon on price rather than quality grounds, but much of the incremental demand is reported by trade sources to be for use as petfood.

A small number of developing countries have taken the opportunity to exploit the gap left by South African suppliers in the United Kingdom pilchard market. However, since the market is forecast to remain static the potential for existing and potential suppliers rests primarily on the ability to develop and/or expand market shares. Much will depend upon supply conditions and the reported recovery in the South African pilchard industry may add additional competition in future.

Sardines

The United Kingdom market for canned sardines is estimated at 1.2 million cases (over 6,000 tonnes) in 1982, supplied by imports. Import volumes (net) have generally been in the range of 5—6,000 tonnes in recent years (*see* Table 7). The bulk of supplies are of European origin although Morocco achieved an increasing share up to 1982 when a sharp fall was recorded (*see* Appendix 1, Table IV).

The restricted range of suppliers to the United Kingdom market stems primarily from legal factors, that is that the generic term 'sardines' can only be used for *Sardina pilchardus*. Additional effects arise as a result of tariffs and quotas (*see* Section 6, *Tariffs and quotas*, p. 58). Of the three European suppliers, Italy is the most favoured with tariff exemption status, Portuguese supplies have a 60% duty reduction (i.e. from 25% to 10%) whilst Spanish origins attract the full GSP rate. Morocco (and Tunisia) have duty free quotas and reduced duty (10%) quotas (*see* section on *Tariffs and quotas*, p. 58). Overall, however, and particularly in relation to developing countries, species restriction acts as the primary constraint on supply.

As in the case of the pilchard market, variation in volumes sold stem primarily from supply side factors. Variations in availability have sometimes been compounded by health/quality problems, the latter being the cause of reduced imports from Morocco in 1982.

The sardine market is divided evenly between fish packed in oil or in tomato sauce. Few innovations have been attempted successfully, for example ring-top cans introduced by Italian suppliers have not been successful according to trade sources, because of increased pricing. Unless a distinct quality improvement is apparent British consumers appear unwilling to pay higher prices in the 'small fish' market.

Trade sources expect the more or less static trend in consumption to continue in future. Some sources even doubt that a static trend can be maintained and suggest a long run decline, primarily because of quality factors, for example the introduction of fewer fish per can against trade preferences. From developing countries' viewpoint the market is in any case restricted by the legal requirement to supply *Sardina pilchardus* for cannned fish sold under the generic name of 'sardines'. Other small fish species could be supplied, but would have to be marketed under a different generic term, for example 'sardinella'. The critical drawback to marketing such products is unwillingness of the United Kingdom trade to undertake the required market promotion, based upon the view that unfamiliarity of the product and general conservatism of consumers would preclude significant sales. Overall the United Kingdom sardine market therefore presents few opportunities, with the exception of a small number of North African countries.

Mackerel

The United Kingdom market for canned mackerel is significantly smaller in comparison to those for fish products discussed above. Total consumption in 1982 is estimated at around 335,000 cases (around 3,000 tonnes) supplied both from domestic production and imports. Net import volumes have varied considerably over the 5 years up to 1982 (*See* Table 7). In most years net imports of between 1,000—2,000 tonnes have been the norm; however balanced trade and small net exports were achieved in 1978 and 1979 partly in response to particularly abundant domestic catch (*see* section on *Sources and supply of fresh, chilled and frozen fish*, p. 38).

In recent years Denmark has been the main supplier of mackerel imported into the United Kingdom with small volumes from a number of other European countries. Japan was also a supplier in the past, but has recently dropped out reportedly because of inability to compete on price grounds. Developing countries have not been represented amongst suppliers to the United Kingdom except for very small volumes supplied via entrepôts such as Singapore.

No dramatic changes in consumption are expected by trade sources, with fluctuations arising primarily from supply side factors. Some limited substitution for canned salmon may arise on grounds of relative pricing. The product range within the canned mackerel market has however undergone a recent change. Traditionally the product comprised mackerel steaks packed in brine, but recently-introduced canned fillets have captured almost half of the market.

In view of static consumption trends and abundance of supply from domestic and European origins, there appear to be minimal prospects for potential developing country suppliers in the United Kingdom canned mackerel market.

Other canned fish products

A number of additional canned fish products are marketed in the United Kingdom, generally on a relatively small scale. Products include, herring, brisling, anchovies, cod and herring roes, bonito, pâtés and caviar. Cod and herring products are supplied from the United Kingdom domestic catch whilst others are largely imported.

Of the imported products, developing countries are included amongst suppliers for bonito, anchovies and non-specified items, (*see* Appendix 1, Tables V, VI and VII). Virtually all the bonito market is supplied by developing countries, with fluctuating import volumes in the range of 500—1,500 tonnes (*see* Appendix 1, Table V). Peru and Thailand are well established suppliers whilst Malaysia is of growing importance. Around 15% of anchovy imports are of developing country origin, virtually all supplied from Morocco (*see* Appendix 1, Table VI). Import volumes are very small, at around 50 tonnes per annum in recent years. Imports of non-specified fish of developing country origin have varied between 20 to 60 tonnes over the past five years, representing a tiny fraction of the total (*see* Appendix 1, Table VII).

Of the three markets where developing countries currently supply part of the United Kingdom market requirements, only bonito is significant in volume terms. Even the latter market is not large in comparison to markets for fish products discussed in previous sub-sections, and is subject to considerable fluctuations. The anchovy market is restricted to those countries with access to the required species and is in any case of very limited size. Overall the markets falling under this heading represent very limited potential in terms of developing country suppliers as a group.

Shrimp and prawns

Of the two major markets for canned crustaceans, shrimp and prawn* is currently the larger in terms of net imports in comparison to crab. United Kingdom statistics have only distinguished canned shrimp and prawn as a separate item since 1979 and data are therefore necessarily limited (*see* Appendix 1, Table VIII). Total net imports (*see* Table 7) have fluctuated around an average of 1,000 tonnes with some evidence for expansion. In 1982 total United Kingdom consumption was estimated by trade sources at around 200,000 cases (almost 1,000 tonnes). Developing countries have generally supplied around 70% of total imports, the remainder coming from the USA and European countries. Thailand has emerged as the most important developing country supplier whilst volumes from India and Pakistan have declined (*see* Appendix 1, Table VIII).

According to trade sources the canned shrimp and prawn market has been growing at a modest rate in recent years in parallel to the much larger and more dynamic market for frozen shrimp and prawns (*see* section on *Shrimp and prawns*, p. 34). Within the context of slowly rising demand, supply fluctuations have led to variable market performance and explain the uneven growth of imports (*see*

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* Both traders and consumers in the United Kingdom make a distinction between shrimps and prawns purely on the basis of size, shrimp representing small sizes, prawns larger sizes. There is no clearly agreed dividing line in terms of counts per unit weight between the two groups.

Appendix 1, Table VIII). Supply fluctuations arise partly because of variable catch/ availabilities in a number of developing countries, for example India, but a major factor is the alternative markets provided by frozen shrimp and prawns. India's major shrimp and prawn export markets are for frozen products to the USA and Japan; fluctuations in demand in the latter markets have a destabilizing effect on the much smaller canned shrimp and prawn sector. As a consequence, other developing countries, notably Thailand, have assumed greater importance as suppliers to the United Kingdom market in recent years, although some quality problems have been reported from trade sources.

Trade sources expect the modest growth trend experienced in the past to continue in future with a possible development of a 'two-tier' market based upon high or relatively low quality products. The market may present modest opportunities to developing countries in the context of variable supplies from established exporters; however, such fluctuations add an element of uncertainty.

Crab

Crab imports exhibit an erratic upward trend over the period 1977–82 (*see* Appendix 1, Table IX), with import volumes in excess of 1,500 tonnes in recent years. Current (1982) trade estimates of United Kingdom consumption are in the region of 260,000 cases (a little over 1,000 tonnes). Expansion in market size has also been accompanied by a rising share of products of developing country origin, which has accounted for between 30–40% of gross imports in the past few years. Thailand is a long-established supplier, whilst Malaysia is a more recent entrant into the market (*see* Appendix 1, Table IX). However, the major suppliers to the United Kingdom continue to include Canada and Norway, and Canadian supplies have expanded at a particularly rapid rate.

Whilst growth has been quite spectacular in the canned crab market, some doubts have been expressed amongst trade sources as to the likely continuation of the trend. These doubts stem primarily from quality problems reported for products of developing country origin. Potential developing country suppliers may therefore have to place particular emphasis on quality standards in order to sustain import penetration.

Other canned crustaceans and molluscs

A variety of products is imported under non-specified classificiations and in certain cases volumes are quite large (*see* Appendix 1, Tables X and XI). However a large proportion of such imports in fact represent processed and frozen products rather than canned items. In the case of crustaceans, shrimp and prawns are represented on a substantial scale, including cooked and peeled prawns of Malaysian origin and frozen deepwater prawns from Norway in particular. Malaysian products in fact account for virtually all of developing country supplies falling within the non-specified crustacean category.

Developing country suppliers have also contributed very small volumes of molluscs imported under the non-specified classification (*see* Appendix 1, Table XI). Such products are primarily of Asian origin and include a variety of speciality items destined for immigrant and restaurant food markets. Overall the potential for expanding this market segment is minimal.

CONCLUSIONS: PROSPECTS FOR CURRENT AND POTENTIAL DEVELOPING COUNTRY SUPPLIERS

Canned fish and crustaceans currently represent the largest major product market in the United Kingdom for items of developing country of origin. Although import volumes fluctuate considerably year by year, they provide a rough guide to the relative importance of the market, 1982 volumes being around 25,700 tonnes valued at £34.3 million. The latter totals however include certain non-specified trade categories which very largely consist of processed and frozen products, (*See* previous Section), for canned products alone 1982 volumes are around 22,900 tonnes valued at £27.4 million.

Three fish products and two crustacean products currently account for over 95% by value of the total supply of canned products of developing country origin. The three fish products are tuna, pilchards and sardines valued in 1982 respectively at £14.5 million, £6.6 million and £0.8 million, although the latter figure for sardines is abnormally low (*See* section on *Sardines*, p. 27), and would usually be around £3.0 million at 1982 prices. However, the prospects for developing country suppliers vary considerably between these three markets. Pilchard and sardine markets both face static growth prospects and are moreover supplied by a limited number of countries, primarily because of species requirements, the latter being particularly important in the sardine market. In contrast the canned tuna market is not only much bigger, but also provides opportunities for a far larger number of supplying countries in the context of a growing market. Unit pricing/values for tuna are also generally around twice the level of those for sardines and three times that for pilchards. (Pricing and price information are discussed in the section on *Price formation and pricing*, p. 59).

In the United Kingdom tuna market trade sources indicate that limitations to supply rather than market demand represents the major constraint to expansion, and importers are generally keen to develop new sources of supply. In addition to the 'traditional' producet such as tuna 'steaks' packed in oil, potential also exists for tuna chunks and tuna packed in brine. Tuna chunks may be especially appropriate for suppliers whose catch comprises smaller-sized tuna.

The two canned crustacean markets of significance to developing country suppliers are for shrimp and prawn and crab, valued in 1982 at £2.3 million and £2.0 million respectively. The shrimp and prawn market could present some opportunities given slowly expanding demand and erratic supplies, whilst expansion in the canned crab sector has been quite dramatic. However, in both cases quality problems with products of developing country origin have had an adverse effect according to trade sources. Current and potential suppliers will therefore need to maintain especially strict quality control in order to develop and/or sustain market penetration, which represents an attractive option, given high unit pricing.

Of the remaining canned products considered in this section none present particularly substantial market opportunites to developing country suppliers. Canned salmon and mackerel, because of species requirements and established supply structures, provide virtually no potential. Certain minor markets for other items do exist, the largest being for bonito valued at £0.8 million in 1982. None of these minor markets exhibit particularly encouraging signs of growth and are therefore of very little interest to developing country suppliers.

Trade structures, procedures and requirements, with special reference to canned products of developing country origin are detailed in Section 6 and a list of United Kingdom importers and agents provided in Appendix 7.

Section 3

Fresh and processed crustaceans and molluscs

INTRODUCTION: MARKET PROFILE

The major species* which comprise the greater part of the United Kingdom market are Norway lobster (scampi), shrimp and prawn and crab amongst crustaceans, and cockles and mussels amongst molluscs. Less important species include lobsters, scallops, crawfish, snails, squid, whelks and oysters. With the exception of lobster virtually all crustacean products are marketed in frozen form, incorporating varying degrees of further processing.† Mollusc products are marketed in a variety of forms, but frozen items are generally less important than is the case for most crustaceans. The range of processing (aside from freezing) applied to products prior to final sale varies considerably and has been expanding in recent years. Whilst many molluscs, for example cockles and mussels, are marketed in-shell, others, such as shrimp and prawn may be sold whole, or peeled and deveined, with or without batter, etc. Most recently certain products, especially shrimp and prawn have been included in a variety of 'seafood platters' for retail sale.

Consumption of crustaceans and molluscs is a long-established feature of the United Kingdom market, primarily because of the ready availability of products through the domestic catch. Whilst a number of products may be classified as 'traditional', a number of changes have occurred in recent years both in the relative importance of different species and in the form of processing applied to them. This diversification of consumption has arisen partly as a result of changing eating habits, in turn largely stimulated by experience of overseas holidays by a large segment of the population. Changing habits have also been stimulated by market promotion, whilst increasing ownership of home freezers has assisted growth in demand for frozen products.

Crustacean and mollusc products on the whole are not used as the major constituent in main meals, (although exceptions arise, for example, in the case of lobster). Many products however may be used as ingredients of secondary importance such as in seafood platters, etc. More commonly, crustaceans and molluscs are included in various hors d'oeuvres in restaurant meals as salad items, and snacks including those sold at seaside resorts during the holiday season. Consumption is influenced by seasonal factors to varying degrees, but is particularly important for items supplied entirely or very largely from domestic sources, (that is, by the United Kingdom catch).

As in the case of other edible fish products, no single satisfactory measure is available for the scale and composition of the United Kingdom crustacean and mollusc market (*see* Appendix 2). In the case of shellfish, consumption statistics bear little relation to those for the United Kingdom catch net of trade, since the former refer to flesh weight whilst the latter refer to live weight, notably including the weight of shell. United Kingdom household consumption data indicate total

*For Latin and English names of species *see* Appendix 4
†Excluding canned products discussed in Section 2

consumption levels (flesh weight) of around 10,000 tonnes in recent years, but the latter may well underestimate the true figure. Whilst it is not possible to provide an accurate picture of consumption, subsequent sub-sections provide data for individual product markets from trade sources together with import figures—the most relevant measure of market demand from developing country suppliers' viewpoint.

The mollusc market in the United Kingdom is dominated by products derived from the domestic catch and a considerable volume of net exports is usually available. In contrast, certain categories of crustaceans are in much more restricted domestic supply, principally shrimp and prawn, and it is the latter market which provides easily the greatest potential for overseas suppliers.

SOURCES OF SUPPLY OF FRESH AND PROCESSED CRUSTACEANS AND MOLLUSCS

Unlike the market for canned fish products, that for fresh/processed crustaceans and molluscs is supplied to a much greater extent by the United Kingdom catch (and subsequent domestic processing) than from imports.

Data relating to the United Kingdom catch of crustaceans and molluscs for the period 1977—82 are summarised in Table 8. The table illustrates an irregularly declining trend for the catch as a whole, this trend arising primarily from declining stock levels. However the experience for individual species has varied to a degree. Molluscs form the greater part of the catch, although their share fell over the period from two thirds to a little over half of the total. Within the mollusc group the scallop catch remained more or less static, whilst virtually all other species exhibited erratically declining trends, the most significant being those for cockles and mussels. In contrast the crustacean species catch exhibit more or less static trends in the context of year-on-year fluctuations. The exception to the latter statement is provided by the shrimp catch which has fallen from already relatively low volumes at the beginning of the period shown (1977).

Table 8

United Kingdom catch: crustaceans and molluscs 1977—82

'000 tonnes

	1977	1978	1979	1980	1981	1982
Crustaceans						
Norway lobster	15.1	17.4	16.0	13.0	15.7	19.9
Crab	8.6	9.6	10.4	9.7	9.7	8.6
Shrimp	2.7	3.2	1.4	1.2	1.4	1.6
Molluscs						
Scallops	11.9	11.6	13.5	14.8	17.2	14.7
Cockles	17.4	11.6	10.4	15.2	10.4	8.3
Blue mussels	11.4	7.2	5.5	9.1	2.5	4.4
Periwinkles	3.9	2.9	3.2	3.2	2.9	2.7
Whelks	2.8	3.3	1.8	1.2	1.5	1.6
Squid	1.4	0.7	0.4	0.4	0.7	1.2
Other crustaceans and molluscs	2.4	1.5	1.7	2.0	2.2	1.9
Total	77.6	69.0	64.4	70.0	64.4	64.9

Source: *Sea Fisheries Statistical Tables*, MAFF, HMSO

Despite the decline in catch, the United Kingdom remains a net exporter of crustacean and mollusc products as a group as shown in Table 9. The level of net exports has varied considerably and whilst the pattern does not correspond closely to that for the United Kingdom catch, a static or possibly downward trend is apparent. The bulk of exports comprise non-specified categories of molluscs (which probably include significant volumes of scallops), together with crab. However it is also clear from Table 9 that net imports are important, primarily in the case of shrimp and prawns. The substantial net import volumes for shrimp and prawn shown in the table reflect strong domestic demand, in conjunction with limited supplies available from the domestic catch. It should be noted that in addition to imports shown in Table 9, additional shrimp and prawn imports (covering frozen/processed products) also arise under the non-specified trade classification which is primarily concerned with canned products (*see* section on *Other canned crustaceans and molluscs*, p.29). In addition to shrimp and prawn a small net import market also exists for squid.

Table 9

United Kingdom net imports and exports of fresh/processed crustaceans and molluscs 1977–82

tonnes

	1977	1978	1979	1980	1981	1982
Shrimp and prawns	2,510	8,030	8,770	10,780	6,190	7,650
Squid	(260)	120	170	540	430	300
Mussels	(5,230)	(2,910)	390	(3,510)	980	(290)
Crab	(2,150)	(3,600)	(4,780)	(2,930)	(4,300)	(5,960)
Other	(10,770)	(10,230)	(10,360)	(13,700)	(14,930)	(10,220)
TOTAL	(15,900)	(8,590)	(5,230)	(8,820)	(11,630)	(8,520)

Source: United Kingdom trade returns

Notes: †Imports minus exports to nearest 10 tonnes
figures in brackets represent net *exports*

As will be seen under individual product markets discussed below, the absolute levels of imports for shrimp and prawn (and squid) are considerably higher than the net figures shown in Table 9. This feature arises as a result of re-exporting, usually after additional processing in the United Kingdom of a significant proportion of imports.

INDIVIDUAL FRESH AND PROCESSED CRUSTACEAN AND MOLLUSC MARKETS

Because of the abundance of supplies of many species of crustaceans and molluscs from the United Kingdom catch, derived products do not represent potential markets for overseas suppliers. In addition, for certain items where the United Kingdom catch is deficient, abundant supplies are available of appropriate species, primarily from European origins. The only substantial market available to developing country suppliers is that for shrimp and prawns with an additional minor market for squid. Before considering the latter markets individually, other major crustacean and mollusc markets supplied primarily by the United Kingdom catch and/or imports of European origin are described briefly here.

Two relatively distinct market segments may be distinguished within the fresh and processed crustacean and mollusc market on the basis of value of products. The first segment comprises relatively low value items and is very largely confined to mollusc products. Cockles and mussels are the most significant species within the group and although retail and catering packs including cooked items are now marketed, considerable sales of fresh, loose items are made. Net exports occur for many items including mussels and scallops, although some mussels are imported from European origins. Squid also falls within this market segment and represents the only species where some limited opportunities exist for developing country suppliers.

The second market segment covering higher value products is largely confined to crustaceans with the exception of oysters. Crustacean products include scampi (Norway lobster), shrimp and prawn, crab and lobster. Major markets for all species exist in the restaurant trade, however scampi and shrimp and prawn are also marketed in retail packs in a variety of forms (for example, plain frozen, breaded or in batter, etc.). A recent innovation in the crab market has also been retail sales of imitation crab meat, reported by trade sources to be selling well as a frozen item. Markets for all items with the exception of shrimp and prawns are largely supplied by the United Kingdom catch with occasional supplementation of European origins. Shrimp and prawn represent easily the largest import market within the product group on a whole, which is considered in detail in the following sub-section.

Shrimp and prawns*

The shrimp and prawn market in the United Kingdom is easily the largest amongst fresh and processed crustaceans and molluscs that is supplied primarily by imports. The United Kingdom catch, mainly of pink and brown shrimp†, has fallen in recent years and ammounted to only 1,600 tonnes in 1982 (*see* Table 8). Shrimp and prawns are imported into the United Kingdom under a number of trade classifications and the position is complicated by imports under the category primarily covering other, non-specified canned items (*see* section on *Other canned crustaceans and molluscs*, p.29). Because of the latter problem and the fact that items are imported in varying processed forms, net import volumes together with the domestic catch do not provide a clear picture of domestic consumption. Net import data in Table 9 therefore do not cover all imports and significantly understate total volumes.

The United Kingdom market has traditionally been supplied with cold water species of shrimp and prawn, however, limitations to the United Kingdom catch and to other supplies of cold water species have led, since the mid-1970s, to increasing market penetration by warm water varieties, mainly of developing country origin. This growth has also taken place in the context of steadily expanding market demand estimated by trade sources to be in the region of 5% per annum. Recent gross import data for specified trade categories are given in Appendix 1 Tables XII—XIV. Appendix 1 Tables XII and XIII for prawn and shrimps essentially cover cold water species and show declining import volumes from 1978/79 from a total of over 7,000 tonnes to around 5,500 tonnes in 1982. In contrast warm water prawns, primarily included in Appendix 1 Table XIV show a fairly consistent upward trend from 2,000 tonnes in 1977 to almost 9,000 tonnes in 1982.

Suppliers of cold water species largely comprise European countries which have been confronted (along with the United Kingdom) with variable and often declining catch levels. Warm water supplies are primarily of Asian origin, especially India and Pakistan, together with Thailand and Bangladesh (*see* Appendix 1 Table XIV). However a large number of developing countries supply small volumes to the market. A proportion of supplies, apparently of developed country origin shown in Appendix 1 Table XIV represent re-exports of developing country products.

The expansion in recent years in United Kingdom shrimp and prawn consumption and more especially the component represented by warm water species may be attributed to a number of factors:

- An overall growth in demand arising from changing eating habits stimulated by holidays abroad for large numbers of the population
- An expansion in the restaurant sector operated by different ethnic groups for example, Chinese, Indian, etc. and associated acceptance of warm water species which have spread to the restaurant sector more generally
- Expansion in home freezer ownership and use of frozen foods including shrimp and prawn

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*Both traders and consumers in the United Kingdom make a distinction between shrimp and prawn purely n the basis of size; shrimp represent small sizes and prawn larger sizes. There is no clearly agreed dividing line in terms of counts per unit weight between the two groups

†For English and Latin names of species quotes in this section *see* Appendix 4

- Expansion in supermarket chain and retail promotion of catering and retail packs, together with promotion by freezer centres
- Inclusion of shrimp and prawn in an increasing range of seafood retail products including seafood platters, etc.

However certain offsetting factors also arise, relating particularly to warm water species:

- Some year-on-year recoveries occur in cold water species availability and the latter have retained their position of market leadership in terms of quality, based upon the flavour, colour and firm flesh of products
- Some health problems and health scares have occurred with warm water species
- Trade sources report problems of dishonesty in relation to count specifications
- Variations arise in availability of warm water species themselves. The latter arise partly from catch variations and also as a result of demand factors, notably the role of Japan as a price leader amongst importing countries, followed by the USA which in combination may take up a large proportion of products available on the international market, especially at times of shortage of domestically-caught shrimp and prawn

In part, shortages of warm water varieties in the United Kingdom market relate to large sizes (prawns), whilst smaller sizes (larger counts) may remain readily available. Such shortages also have differing impacts on segments comprising the market, the most severely affected reportedly being the Indian-restaurant trade where large sizes are preferred. In general however, importers accept a full range of sizes/counts, either cooked or uncooked, individually quick frozen (IQF) for larger sizes or block frozen for smaller sizes. (For details of importer requirements *see* sub-section on *Packaging requirements*, p.56).

The overall market prospects for shrimp and prawn markets appear favourable to new suppliers since supply shortages (of both cold and warm water species) are generally much more important constraints than demand side factors. The primary use of shrimp and prawn is in (restaurant) meal hors d'oevres, where there are relatively few immediate substitutes and where consumer demand has been growing steadily. Growing consumption has also been assisted by the expansion of retail packs including cooked/peeled/frozen products, products in batter, and seafood platters incorporating shrimp and prawns. However, suppliers of warm water species need to ensure quality standards are met in order to maintain market penetration. The continuing quality status of cold water varieties and variable supply levels of the latter also add an element of uncertainty to future warm water demand levels.

Squid

The only other fresh and processed crustacean and mollusc market currently supplied in part by products of developing country origin is that for squid. In comparison to shrimp and prawn both the overall market size and the volumes supplied by developing countries are very small. The bulk of the market is currently supplied by the United Kingdom catch although volumes have varied considerably in recent years (*see* Table 8). Since 1977 the United Kingdom has moved from a position of net export to net import of squid (*see* Table 9), with the 1982 level at around 300 tonnes. Net imports in combination with catch data suggest a current market volume of around 1,400 tonnes, but differing levels of processing of products mean that such data are at best an approximate reflection of market size.

Gross imports are shown in Appendix 1 Table XV, indicating a total of around 550 tonnes in 1982 with the USA as easily the largest supplier with 70% of the total. Developing country suppliers are only marginally involved with import shares ranging from 5—15% over the period 1977—82, supplied by Asian and Latin American countries.

The squid market is reported by trade sources to be dominated by the Chinese restaurant trade, which is said to account for 75% of squid consumption. The remainder goes to a variety of specialist and restaurant outlets, whilst a re-export trade, particularly to France, is in operation. Imports are primarily in the form of squid tubes, with a premium placed on soft texture and limitation of ink contamination to a minimum. Suppliers from the USA have established themselves as the major source of imports on the basis of meeting high quality standards.

The potential for developing country suppliers to the United Kingdom squid market are quite limited. The United Kingdom catch, though variable, has recovered in recent years and additional supplies are primarily met by high quality competatively-priced items of US origin. Market growth is not expected to be significant in future according to trade sources and consequently little potential exists for new suppliers.

CONCLUSIONS: PROSPECTS FOR CURRENT AND POTENTIAL DEVELOPING COUNTRY SUPPLIERS

In most respects the United Kingdom market is well supplied from domestic sources with regard to fresh and processed crustaceans and molluscs. Markets are generally fairly static although sometimes subject to fluctuations as a result of variable catch levels, when occasional net imports from European origins may occur.

Shrimp and prawn represent the exception as the only substantial market supplied largely by imports, amounting to £38.7 million or 86% of the total value of fresh and processed crustacean and mollusc gross imports in 1982. Developing countries have played an increasing role in this market and future opportunities favour new suppliers as a result of several major factors:

- The likely continuation of relatively constrained levels of availability of cold water species of shrimp and prawn
- Growing consumer demand, estimated at 5% p.a. by trade sources for shrimp and prawn and increasing consumer acceptance of warm water varieties
- Limitations in availabilities of warm water species from a number of current major, developing country suppliers to the United Kingdom market

Shrimp and prawn are a relatively high value commodity in the context of edible fish products as a whole, with premium pricing of larger sizes (prawns) in particular*. With careful quality control and competitive pricing, new entrants should face good prospects in the market.

Squid represents the only other species where developing countries are likely to continue to supply a part of market requirements and both the size of market overall and developing country's share are small. Squid imports in 1982 valued at £0.45 million represent only 1% of the total for fresh and processed crustaceans and molluscs. Developing country suppliers face strong competition from high quality, competitively priced products of US origin and scope for market expansion and penetration appears very limited.

*For a discussion of pricing *see* Section 6

Section 4

Fresh, chilled and frozen fish

INTRODUCTION: MARKET PROFILE

The United Kingdom market for fresh/frozen fish is easily the largest segment of demand for edible fish products as a whole. The market may in turn be subdivided into two components, comprising major sea and freshwater species, and that for specialist exotic species. The major product market is dominated by a relatively small number of species,* cod and haddock being the most important, followed by whiting, herring, plaice, mackerel, sprats, saithe and sole. A number of other species are also marketed, but in relatively small volumes. Trout and salmon represent the major species from the diadromous and freshwater groups.

The market for exotic species is quite distinct from that for major products and is very small in comparison, that is, probably representing only 1—2% by volume of total fresh/frozen fish consumption. Species marketed in the exotics category include sea bream, red snapper, red mullet, white pomfret, sea bass and sword fish.

Fresh/frozen fish products are very largely used as the major constituent in main meals in the home, in catering and in restaurant and takeaway food trades. Consequently such items are in competition, principally with meat and meat products and more generally with other food items. Broad changes in relative price competitiveness with meat and other food products help to explain the trends exhibited in consumption of fresh/frozen fish, since other factors such as population and income growth have not registered very substantial changes in recent years. Recent consumption data† are presented in Table 10 for fresh/frozen fish as a whole and by broad product groups, such as fresh, frozen and processed items. Until the mid-1970s consumption overall was declining but a fairly consistent upward trend is illustrated in the table for the period 1977—82. Although fish product prices have increased more rapidly than those for meat at the beginning of the period, rises have been below those for both meat and for food products as a whole since 1979 which has stimulated consumption (*see* section on *Market profile for edible fish products* p.15).

Total fresh/frozen fish consumption has risen by over 20% during the period 1977—82, however the experience between fresh, frozen and processed products‡ has differed significantly. Whilst fresh fish consumption after a period of modest growth has fallen back to 1977 levels, both frozen and processed product consumption have grown by just under 40%. As a consequence, both fresh and processed products now account for roughly 30% each of the market, whilst frozen products account for a little below 40%. A variety of factors more fully discussed in the section on *Major seafish markets*, p.40, have contributed to this

*For English and Latin names of species, *see* Appendix 4
†For comments on data sources and problems of data *see* Appendix 2
‡The distinction between frozen and processed categories is blurred since many frozen products have also been processed to a relatively high degree

Table 10

United Kingdom consumption of fresh, frozen and processed fish 1977–82

'000 tonnes

	1977	1978	1979	1980	1981	1982
Total						
of which	297.2	307.7	329.7	344.6	350.6	365.5
Fresh	117.7	118.6	119.6	122.0	121.6	116.3
Frozen	98.8	97.1	103.8	115.4	117.9	137.1
Processed	80.7	92.2	106.3	107.2	111.3	112.1

Sources: Per capita consumption data: *Business Monitor—Bacon Curing, Meat and Fish Products*, PQ 214, 4th quarter 1982, HMSO 1983
Population data: *Annual Abstract of Statistics No. 120*, CSO, HMSO, 1983 edition

Note:† Consumption data derived by multiplying per capita levels by population

differential growth performance. In essence such factors relate to changing consumption habits and lifestyles, accompanied by changes in the fish processing industry and in marketing in the catering, retail and takeaway food sectors, with the introduction of an ever-widening range of products.

The fresh/frozen fish market will remain the largest market segment for edible fish products in the United Kingdom, but it is difficult to predict whether growth in consumption in recent years, at around 4.5% per annum, will be maintained. Whilst diversification of products is also likely to continue these will very largely be confined to species derived from the United Kingdom catch and/or European and North American origins. Although a number of exotic species are marketed in the United Kingdom, they represent a very small market segment essentially supplying the ethnic restaurant trade and associated ethnic communities.

SOURCES OF SUPPLY OF FRESH, CHILLED AND FROZEN FISH

A large proportion of the United Kingdom market for fresh/frozen fish is supplied from the domestic catch; however substantial import and export trades also exist. Fish from the United Kingdom catch and from imports are processed to varying degrees prior to sale within the broad categories identified under consumption groups in the previous section.

United Kingdom catch data are summarised in Table 11. The total catch has declined over much of the period shown from well over 800,000 tonnes in 1977 to around 700,000 tonnes in 1982, although a marginal recovery is evident from 1981—82. The performance between individual species has however been rather varied. Mackerel catches increased dramatically up to 1979 but have fallen thereafter, several species illustrate a continuous decline, such as plaice, whilst others, after an initial period of decline have partially recovered from around 1980/81, eg. cod, haddock, sand eels and herring.

Variable catch levels (overall and by species) have arisen as a result of differential effects of fishing effort on available fish stocks and by the effects of conservation measures and the imposition of Exclusive Economic Zones (EEZs). The imposition of EEZs of up to 200 miles, especially that by Iceland, has had the effect of excluding the United Kingdom fishing fleet from traditional distant-water fishing grounds. Partly as a consequence more intensive fishing in waters still accessible to the United Kingdom fleet has led to depletion of stocks, especially for species

Table 11

United Kingdom catch†: wet fish 1977–82

'000 tonnes

	1977	1978	1979	1980	1981	1982
Total	838.7	887.5	771.8	689.1	681.0	709.7
of which:						
Mackerel	186.8	321.0	353.5	253.1	197.2	185.7
Haddock	122.9	82.4	72.8	84.8	100.1	129.0
Cod	147.7	126.4	109.3	104.3	115.7	114.3
Sand eels	26.1	32.5	13.4	33.5	52.6	63.1
Whiting	50.0	58.0	61.1	56.4	52.0	50.7
Herring	43.0	16.0	4.6	5.6	36.3	47.9
Plaice	35.7	32.0	32.1	26.2	25.2	24.3
Sprats	97.0	102.5	31.7	24.1	27.6	19.6
Pollock	35.5	31.2	18.8	14.8	14.2	16.6
Others	94.0	85.5	74.5	86.3	60.1	58.5

Source: *Sea Fisheries Statistical Tables*, MAFF, HMSO

Note: †Catch landed by British vessels

such as cod, formerly fished in distant waters. Increasing competition has also arisen from fleets operated by other European countries and in response to these circumstances an EC Common Fisheries Policy has been negotiated.* One of the main features of the policy is to lay down total allowable catch levels (TACs) by member countries† per species, based upon a proportion of average catches in recent years and making some allowance for conservation needs.

The decline in the United Kingdom catch for most species in recent years has been accompanied by a dramatic increase in levels of net imports up to 1980/81 with some stabilisation and falling trends thereafter for some species (*see* Table 12). Mackerel represents an exception as a species where there is a substantial domestic catch, but because of its relative unpopularity, a considerable export surplus is generally available.

Table 12

United Kingdom net imports and exports of fresh/frozen fish 1977–82

'000 tonnes

	1977	1978	1979	1980	1981	1982
Cod	59.6	96.7	121.0	120.2	110.5	105.5
Plaice	11.8	17.4	20.1	24.8	23.4	23.5
Haddock	1.0	11.6	21.4	15.3	18.4	14.0
Pollock	2.6	2.2	5.2	9.1	5.6	5.8
Salmon	2.6	4.1	4.7	4.2	5.2	4.9
Herring	(12.5)	0.9	6.5	9.4	10.7	(12.0)
Mackerel	(52.7)	(245.1)	(346.8)	(257.1)	(182.6)	(139.0)
Others	(4.3)	(9.2)	(0.3)	(1.4)	(6.1)	3.3

Source: United Kingdom trade returns

Note: Figures in brackets represent net exports

On the net import side, cod is easily the most important species, with plaice and haddock in positions of intermediate importance. In most instances net imports have increased up to 1980/1981 and subsequently declined, roughly in line with trends in the United Kingdom catch overall, although on a species basis the correlation is not particularly close.

*For an outline of the Common Fisheries Policy *see* Appendix 3
†Agreements also cover certain non-EC countries

Because of problems of data availability and interpretation (*see* Appendix 2) it is not possible to derive United Kingdom market size from catch and net trade data. It is similarly difficult to assess the role of imports in meeting market demand. However, in approximate terms imports have rapidly expanded their share of the total market from around 25% in 1977 to 50% in 1980, falling thereafter to around 40% in 1982. Supplying countries are very largely limited to Europe and/or those with access to North Atlantic fisheries.

MAJOR SEA FISH MARKETS

The distinction has been drawn in earlier sections between the major sea fish (and subsidiary freshwater/diadromous) market and that for exotic species. This distinction is of fundamental importance with respect to the potential of developing country suppliers to the United Kingdom market. The major market is supplied by the United Kingdom catch and by countries with access to north Atlantic waters, primarily in Europe, but also for North America. The potential for developing country suppliers in this market is very limited because of the relatively narrow range of species required, with diversification of products by the introduction of new processed forms rather than species. In contrast, developing country suppliers do play a leading role in exotic fish markets discussed in *Individual specialist/ exotic fish species markets, see* p.42.

The diversification of processing and products within the context of steadily rising consumption has arisen in response to a number of changes in the pattern of United Kingdom consumer requirements and social circumstances, which include:

- Increasing leisure time and informal lifestyles
- A rising proportion of working women
- An increasing number of single-person households
- Partly as a corollary to the above factors, an increasing preference for easy-to-prepare convenience foods, expressed particularly by urban consumers
- Increasing owership of home freezers (rising over the decade 1972—82 from 6% to 62% of households)

In response to changing consumer needs, corresponding changes have occurred in the United Kingdom fish processing and distribution trade which include:

- Production of an increasing diversity of frozen and/or processed products by a relatively small number of major companies and their subsidiaries
- Re-organisation and expansion of transportation systems directed increasingly towards large-scale distribution chains and supermarkets;
- Increasing promotion of frozen and processed fish products both by processing and wholesale and retail concerns
- Increasing concentration of retailing of frozen and processed fish products amongst supermarkets and a growing number of bulk-purchase frozen-food centres partly at the expense of traditional wet fish retail outlets which have declined sharply in numbers, for example a decline of 45% between 1971 and 1982

Changes have not been to the complete exclusion of wet fish, for example, some supermarkets have begun to install wet fish counters as well as facilities for processed and frozen products. However, the wet-fish sector has generally been less dynamic with stagnant consumption levels (*see* Table 10). The wet-fish sector has also been adversely affected by the decline in relative importance of the traditional fish and chip trade as a result of increasing competition from the ethnic restaurant trade, and fast-food takeaways and restaurants more generally.

Developing countries have played little part in supplying the major United Kingdom fresh/frozen fish market and future prospects also appear constrained. Two possible areas of participation exist. Developing countries may have access to and be able to supply some fish species which are closely related to those required by the United Kingdom market; to date this has only occurred in the case of hake. Secondly, developing countries could supply unfamiliar species which could act as substitutes for the major species in the United Kingdom market, but to date this has not been implemented. The constraints inhibiting development of these two types of market opportunity are briefly discussed in the folllowing two sub-sections.

Close substitute species, primarily hake

Developing countries have only variable access to species which are close substitutes to those required in major United Kingdom markets. The only significant example where developing countries have supplied part of United Kingdom requirements by closely related species arises in the case of hake. Hake imports of developing country origin are included in Table 13 and illustrate a sharply declining trend both for whole fish and fillets from a combined total around 6,000 tonnes in 1977 to 200 tonnes in 1982. A number of factors contribute to both the limited size of the United Kingdom market for hake and to the declining role of developing countries including:

- Market demand for hake is limited and according to trade sources the species is regarded as down market with limited consumer appeal
- Developing country hake suppliers are almost exclusively confined to Latin America (*see* Appendix 1 Tables XVI and XVII) especially Argentina where supplies have recently been disrupted
- The United Kingdom catch of hake has expanded since 1979 from around 2,000 tonnes to 3,000—4,000 tonnes and consequently supplies a higher proportion of the market
- The recent recovery in the United Kingdom catch and availabilities from other suppliers of major species such as cod and haddock, have provided increased competition for less popular species such as hake
- The existence of escalating duties geared to quotas which are set at very low levels (*see Trade regulations and requirements*, p.55) with full duty rates applying to Latin American supplying countries
- the existence under EC regulations and the Common Fisheries Policy of a system of reference prices (minimum import prices), such that low priced supplies may attract a countervailing duty (*see* Appendix 3)

The future potential for developing country suppliers in the United Kingdom hake market does not appear very bright. Because of data problems it is not possible to identify consumption volumes accurately, but taking trends in catch and net trade combined, it appears that the market has contracted in recent years. The proportion of the hake market supplied by the United Kingdom catch has also sharply increased and prospects for overseas suppliers appear constrained. The prospects for developing country suppliers providing part of market requirements for other species in the major United Kingdom fresh frozen fish market do not appear particularly strong either. Recent recoveries in United Kingdom catch levels for many of such species, in combination with improved availability primarily of European origin, appear sufficient to meet market requirements. Limited access to required species for a number of developing countries also constrains marketing potential. Finally, the EC system of reference prices for most major species constrains the ability of developing country suppliers to penetrate markets by competitive pricing.

New species as substitutes to major species

Developing countries have as yet failed to supply unfamiliar species as substitutes for major species in the United Kingdom fresh/frozen fish market. A number of factors have contributed to this failure, most of which also suggest that future prospects are limited. Factors include:

- The ready availability of the traditionally preferred species themselves, notably in the context of the recent recovery in the United Kingdom catch and in availabilities from European and North American origins
- The view held by a number of major United Kingdom, fish processing firms that the United Kingdom consumer is unwilling to accept unfamiliar species
- As a consequence of the above, the need for unfamiliar species to be supplied at relatively low prices, trade sources suggest a figure around 20% below the ruling price for the species to be substituted
- The need to match both organoleptic qualities and processing requirements to those of the consumer and fish processor respectively; unless both conditions can be met the species is unlikely to be acceptable
- The requirement if accepted for large volume shipments, on a regular basis and with high quality control (in comparison to the relatively small shipment sizes for most products of developing country origin entering the United Kingdom market)
- The existence of under-utilized species in North Atlantic waters which are already being investigated as potential substitutes and/or additions to current commonly consumed species. Under-utilised species include blue whiting and Norway pout, both of which could be utilised in minced products

Whilst in theory the option remains open for developing countries to attempt to supply unfamiliar species as substitutes, the prospects do not appear very encouraging. It is difficult to predict future trends in supply and demand for fresh/frozen fish, but it appears that improving supply circumstances will be sufficient to meet likely growth in demand. It is unlikely that strong upward pressure in prices will arise, except from occasional seasonal shortfalls and hence opportunities for substitution may be constrained. Much may also depend upon the reactions of major United Kingdom processing companies who would have to be convinced of the viability of substitution. Many of these companies have had very little contact with developing country suppliers in the past and generally hold the view that consumer resistance would occur if novel species were introduced. Unless acute supply shortages occur, it may prove difficult to convince processors that the risks associated with processing new species would be worth taking, given the requirements for market promotion for what would be regarded only as a downmarket item.

INDIVIDUAL SPECIALIST/EXOTIC FISH SPECIES MARKETS

The market segment for specialist/exotic fish species and species types* represents only around 1% by volume of the total fresh/frozen fish market but is supplied to a significant degree by products by developing country origin. The specialist market segment primarily serves ethnic community markets and associated restaurant trades together with certain 'gourmet' outlets, notably in up-market restaurants. Import volumes are summarised in Table 13 and are mainly grouped under non-specific trade categories. The total volume of such imports has fluctuated between 1,000—3,000 tonnes during the period 1977—82, but a total of 2,000 tonnes is probably the norm.

*For some exotic fish, a number of species may fall under the same English generic name, Appendix 4 provides a list of English and Latin names

Table 13

United Kingdom fresh/frozen fish consumption and imports for trade categories where developing countries supply part of market demand 1977–82

'000 tonnes

	1977	1978	1979	1980	1981	1982
United Kingdom consumption	297.2	307.7	329.7	344.6	350.6	365.5
Imports of developing country origin of which:	7.0	6.1	5.4	4.0	4.3	1.8
Non-specified saltwater	0.5	0.9	1.1	1.1	1.7	0.8
Salmonidae	0.1	0.4	0.2	0.4	0.8	0.6
Hake-fillets	4.2	2.8	2.6	0.9	0.7	0.2
Sea bream	0.2	0.5	0.2	0.2	0.3	0.1
Other fillets	0.2	0.1	0.1	0.2	*	0.1
Hake-whole	1.7	1.3	1.1	1.2	0.8	*

Sources: —For consumption—as in Table 10
—For imports—United Kingdom trade returns

Note: * = Below 50 tonnes

Imports of non-developing country origin also occur under non-specified trade categories, but these mainly represent different species from those of developing country origin and do not compete in specialist exotic markets to a significant degree in most cases.

With the exception of sea bream, individual species types are not identified in trade statistics; however it has been possible to identify most of the major groups involved and approximate marketed volumes from trade sources. Market features relating to individual species types are reviewed in the following sub-sections (see Appendix 4 for English and Latin names of species types).

Red snapper

Red snapper is the largest volume exotic species market, although it is difficult to assess precisely the scale of consumption. Some trade sources place current marketed volumes as high as 1,000 tonnes, although the latter figure appears rather large. The market is supplied exclusively from imports, the bulk of which are reported by trade sources to be of developing country origin, although no assessment of relative market shares is available. Argentina has been a major if erratic source of supply to the market and instability of supplies has resulted in a parallel fluctuation in pricing.

Virtually all supplies of red snapper are directed towards ethnic community markets where growth trends are difficult to predict. The population growth of such communities, although high in United Kingom terms, is slowing down and some Westernisation of tastes may be occurring. Growth in demand may thus be inhibited, particularly in the context of erratic price movements, but new suppliers who could guarantee regular shipments may find a place in the market.

Red mullet

Red mullet is the second largest exotic species market in volume terms with current consumption levels probably in the range 500–600 tonnes. A small proportion of the market, around 10% of the total, is supplied from the United Kingdom catch, with limited volumes also supplied by non-developing Countries. Developing countries, which supply the bulk of the market, are represented particularly by East Asian countries, notably Thailand and Hong Kong.

The market for red mullet is largely limited to the restaurant trade and according to trade sources Greek and Italian restaurants are major purchasers. The species is said to have similar appearance and organoleptic properties to traditionally preferred species which are now in short supply. Since market demand is primarily linked to the restaurant trade, prospects for modest expansion in future are reasonably strong, primarily because of the trend towards eating out more frequently by many groups in the population. Some potential may thus exist for new supplies especially since the market is not at present dominated by a single supplying country.

Sea bream

Sea bream is the only specialist/exotic species where imports occur under a separate trade classification and data for the period 1977—82 are included in Table 13. Total imports have fluctuated over the period with a peak of almost 800 tonnes in 1979 falling to 350 tonnes in 1982. The share of developing countries in supplying the market has also varied with supplies primarily of Latin American and Korean origin (*see* Appendix 1, Table XVIII). Other suppliers include South Africa and the Canary Islands; however shipments from the latter are primarily of Korean origin. Bearing in mind the latter fact, the bulk of the market has been supplied from Korea and/or Argentina with fluctuating supplies from both countries.

Utilisation of sea bream is primarily confined to the restaurant trade, particularly Italian and also Chinese restaurants. The potential for future market growth is similar to that for red mullet as both species are primarily tied to the restaurant trade with moderate prospects for expansion. Import data indicate the supplies have been rather erratic in the past and hence opportunities may arise for new suppliers. Such suppliers would nonetheless have to compete with current Korean suppliers who may represent quite strong competition.

White pomfret

The market for white pomfret is smaller than those discussed above, being in the range 250—350 tonnes, supplied solely from imports. Supplies are of Asian origin, principally from India, Bangladesh and Pakistan. The market for white pomfret in the United Kingdom is almost exclusively confined to ethnic communities who originate from the current supplying countries, that is India, Pakistan and Bangladesh. The market for the species is therefore fairly restricted, although some future growth may arise primarily through expanding ethnic populations. Prospects for new suppliers other than those from current supplying countries are not promising owing to well-established trade links.

Grouper

The market for grouper is relatively small and is probably in the range of 200—300 tonnes. Supplies are of Asian origin, but little information is available on the relative importance of specific countries.

Outlets for grouper are provided by the Chinese comunity in particular, including both restaurant and retail trade, together with some sales amongst other ethnic community markets. The potential for expansion in the grouper market does not appear to be particularly strong, although since supplies are reported to be erratic, some opportunities may arise.

Sea bass

Imports of sea bass are smaller than those for grouper, but it is not possible to provide estimates of volumes. A similar lack of information arises with respect to origin of supplies, although South East Asia is important.

Market outlets for sea bass are similar to those for grouper and include the Chinese community in particular, together with some demand from other ethnic groups. Although some limited expansion in requirements may occur in future, the market is so small that is represents an area of only marginal interest.

Swordfish

The market for swordfish is of similar size, or perhaps a little smaller, to that for sea bass. However, little information is available concerning precise volumes and origins of supply. Trade sources report some expansion in imports in the past few years.

Unlike most other exotic fish markets, outlets for swordfish are fairly widespread and are not confined to ethnic communities. Sales are primarily directed towards the restaurant and catering trade as a whole. The modest expansion in imports noted by trade sources is expected to continue partly as a result of expansion and diversification in restaurants and catering more generally. Some opportuniteis for new suppliers may therefore arise, but marketed volumes will remain very small in comparison to most other fresh/frozen fish products.

Salmonidae

A variety of fresh water and diadromous species are imported under the *Salmonidae* trade classification and recent import volumes are shown in Table 13. In most years the bulk of supplies are of developing country origin where volumes have fluctuated erratically around a rising trend to reach 600 tonnes in 1982. Trade classifications do not provide a breakdown by species of imports; however some information on species and markets has been obtained from trade sources.

The bulk of developing country supplies imported under the *Salmonidae* classification are of Bangladesh origin (*see* Appendix 1 Table XIX). Four major species are imported from the latter source: boal, rohu, pavda and pangashi, together very small volumes from a large number of other species. Imports are directed towards Bengali communities primarily by retail outlets, together with very much smaller volumes utilised in the Bengali restaurant trade.

Although the market for Bengali species is expanding slowly there are few prospects for other suppliers other than from Bangladesh itself. This conclusion stems partly from the specific species required but also from the closely established trade links which have been developed to supply this particular market. India and Pakistan, currently supplying small volumes under the *Salmonidae* trade category (*see* Appendix 1 Table XIX) may act as minor subsidiary suppliers, whilst small volumes from other Asian countries are probably directed towards other ethnic markets.

Other specialist fish markets

The only other imports of developing country origin aside from those discussed in preceeding sub-sections, arise under the trade classification for non-specified fish fillets.* The bulk of such products are of European and North American origin (*see* Appendix 1 Table XX) with erratically fluctuating supplies from developing countries accounting for less than 1% of the total. In most years developing country supplies fall in the range 100—200 tonnes in total originating from Asian countries and, more recently, Latin America.

Very little information is available on markets served by fish fillets of developing country origin. Modest volumes from Asian origins are directed towards ethnic community markets although the preference in such markets is very largely for 'round' (i.e. whole), fish. Small volumes of Latin American origin may enter substitute species markets in a similar manner to hake. It is difficult to foresee any significant expansion in trade under this category and hence opportunities for new suppliers are marginal.

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*Although in 1982 developing countries supplied a few tonnes of frozen salmon, this market is very largely supplied by United Kingdom and North American origins

CONCLUSIONS: PROSPECTS FOR CURRENT AND POTENTIAL DEVELOPING COUNTRY SUPPLIERS

A basic distinction exists in the fresh/frozen fish market in the United Kingdom between the major market segment which is primarily concerned with whitefish products and with the very small segment dealing in specialist/exotic species. Whilst developing countries play a major role in the exotics sector, actual and potential penetration of the very much larger major market segment is severely constrainted. Factors inhibiting market penetration include:

- Reportedly conservative tastes amongst United Kingdom consumers who are familiar with and find acceptable a relatively small range of whitefish species. In many cases developing countries do not have access to such species, and only in the case of hake have they supplied part of the United Kingdom markets needs
- Even where developing countries do have access to required species the improving domestic catch and European supplies act as strong competitors for example, in relation to shipment costs
- Major United Kingdom processors are often unfamiliar with developing countries as sources of supply and are unwilling to accept unfamiliar species as substitutes unless priced at a discount around 20% of the ruling prices of species to be substituted. Novel substitutes would also have to meet organoleptic and processing requirements with strict quality control, guarantees of regular shipment, etc.
- The existence of under-utilized species accessible from the United Kingdom catch which may be both more familiar and acceptable to United Kingdom fish processors if pressure arises to diversify species
- The existence of reference prices for most major species which may constrain developing country suppliers' penetration of markets by low-priced items

To date developing countries have not succeeded in supplying novel species as substitutes for major whitefish species have only supplemented supplies of hake. The latter represents a species of minor importance and is regarded as a downmarket item. Imports of hake have contracted sharply in recent years partly because of improved domestic supplies and also as a result of expansion in availability of major preferred species. Future prospects do not appear encouraging either for novel substitutes or supplements for currently accepted species.

Developing country supplies do play a substantial role in specialist/exotic markets but prospects for new suppliers may be constrained by a number of factors including:

- The small size of the exotics marked as a whole and its fragmented nature, since many species are supplied to specific ethnic minority markets
- The organisation of marketing (*see* also section on *Trade structure and marketing channels for other edible fish products*, p.53) which for some species is largely operated by members of the ethnic community with fairly close links with countries of origin of imports, hence new suppliers are not welcomed. In other cases such organisation is not very well developed, placing constraints on expansion of marketing effort
- For some species, for example, sea bream, one or two major suppliers are already established and could provide strong competition to new entrants. In other cases, species requirements are so specific that potential suppliers are limited to only a few countries
- Growth prospects between species markets are mixed but are generally modest, partly because of slowing growth in ethnic population and also to 'westernisation' of diets

— Individual species markets are often subject to erratic delivery of supplies which frequently result in corresponding price fluctuations

Despite the difficulties noted, some modest possibilities for expansion exist for current and potential suppliers as indicated under specific species subsections.

Section 5

Dried and smoked fish

Introduction: market profile

The major species which comprise the greater part of United Kingdom markets for dried/smoked fish are herring and salmon.* In recent years mackerel products have reportedly become more popular and products derived from cod, haddock, pollock and whiting are also significant. A number of minor items are also marketed including smoked trout, eel, scallop, mussels and cod's roe, together with dried/salted anchovies and some tropical fish species.

A variety of processed forms are marketed, for example, salted, pickled or smoked herring, but most fish products are sold in smoked form. Many items are frozen prior to distribution and sale, especially those marketed by supermarket chains. Smoked products may also ultimately be converted into pâtés prior to final sale, notably in the restaurant trade and in sandwich bars, etc.

As in the case of fresh/frozen fish a distinction can be drawn between major markets which often include relatively high quality and value products, notably for smoked items, and those essentially for consumption in ethnic community markets. Products supplying the latter are generally of low value and include hard dried items, notably stockfish†. Ethnic community markets are considerably smaller in size than major product markets.

Consumption of dried/smoked fish is a long-established feature of the United Kingdom market, but has been confined to a relatively narrow range of products. In the past, major products were primarily derived from smoked herring, but the market has contracted in recent years partly because of supply/catch limitations and also a possible shift in consumer preference to products falling within the fresh/frozen fish category. Promotion of smoked mackerel has become more common in recent years and smoked salmon markets have expanded, partly as a result of the development of Scottish salmon farming together with generic promotion and takeup by major retail chains.

Dried/smoked fish products are not used as main courses in meals. Many products are used as hors d'oeuvres in restaurants, with utilisation by the hotel and catering trade being of particular importance. Home-based preparation has probably declined in recent years.

As with other fish products, it is difficult to assess accurately the level of consumption of dried/smoked fish (Appendix 2). The sector is small in comparison to most other fish product categories and published data on production and consumption are very limited. One reason for the lack of data is that the practice of freezing many products prior to sale leads to their inclusion in data relating to the fresh/frozen fish sector. United Kingdom production figures and net trade

*For Latin and English names of species *see* Appendix 4
†Stockfish are headed, gutted, split or unsplit whitefish (e.g. cod, haddock, saithe and hake), dried without salt

information do not reveal meaningful data on marketed volumes, partly because production data is confined to enterprise above a minimum level of scale. Problems also exist because of processing and conversion to product or liveweight equivalents. Overall little weight can be placed on official production statistics since they clearly understate true levels.

In terms of product weight, total current consumption of dried/smoked fish is probably below 10,000 tonnes, but no overall estimates of any accuracy are readily available. From the viewpoint of potential suppliers however, import data is of more immediate relevance, and trends are discussed in the following sub-section for products where developing countries supply part of market requirements.

Although production of dried/smoked fish products had declined sharply in the United Kingdom in recent years (on the basis of available data), the domestic market is still primarily supplied from this source. Imports are relatively small and the United Kingdom remains a net exporter of many items.

SOURCES OF SUPPLY OF DRIED AND SMOKED FISH

The bulk of the United Kingdom market is supplied by domestically produced products from species available from the United Kingdom catch, supplemented in some cases by supplies from European and North American sources. In the case of salmon, part of the requirements are also met from salmon farming. United Kingdom production data indicate a decline from a total of 32,700 tonnes in 1977 to only 5,500 tonnes in 1982 (*see* Table 14), although data almost certainly understate production levels. In part the decline in production has arisen from falling herring catches up to 1980, however, recovery in catches since that year have not been reflected in recovery in production of associated dried/smoked products. A contraction has also occurred in production of items utilising whitefish. Trade sources however, report some expansion for smoked mackerel and salmon products.

Table 14

United Kingdom production and trade: dried/smoked fish products 1977–82

'000 tonnes

	1977	1978	1979	1980	1981	1982
Domestic production†	32.7	26.7	15.1	8.5	6.9	5.5
Gross exports	20.1	15.6	13.8	13.1	13.5	9.3
Gross imports	3.1	4.2	4.2	3.4	3.7	3.0
Net (export) balance	17.0	11.4	9.6	9.7	9.8	6.3

Sources: For production: *Business Monitors, Bacon Curing, Meat and Fish Products, PQ 214, 4th quarter 1982*, HMSO, 1983
For exports and imports: United Kingdom trade returns

Note:† Coverage is thought to account for 85% of the employment of all establishments classified in the industry

Despite the decline in production of many items the United Kingdom remains a net exporter overall for dried/smoked fish products (*see* Table 14.) Export volumes have fallen, though not to the same degree as production, from 20,100 tonnes in 1977 to 9,300 tonnes. Imports have remained relatively stable, fluctuating between 3,000–4,000 tonnes and largely consisting of herring and whitefish species products from countries with access to North Atlantic fisheries. A part of whitefish imports comprises stockfish, imported to supply ethnic community markets.

INDIVIDUAL DRIED AND SMOKED FISH PRODUCT MARKETS

Imports overall play only a minor role in the United Kingdom dried/smoked fish market and may be broadly divided between dried/salted items and smoked products. Developing countries overall do not act as suppliers of major markets for high quality/value products (for example soft smoked items), for a variety of reasons, such as the large volume of supplies available from the United Kingdom catch supplemented by European and North American sources, together with the limited range of species required. Developing countries suppliers also play little part in certain ethnic community markets, most notably that for stockfish. The latter market has developed on the basis of North Atlantic species with imports primarily of European origin, especially from Scandinavian countries. Developing countries do act as suppliers of certain dried/salted products, with the bulk of items entering under non-specific trade categories either as whole fish or as fillets. The only category distinguished by species where developing countries play a role is dried/salted anchovies.

Total imports of developing country origin have fluctuated between 75 to 150 tonnes, representing a small share, even of the very modest-sized total import market. The following sub-sections examine individual product markets where a proportion of imports has been supplied by developing countries.

Anchovies

The United Kingdom market for dried/salted anchovies is met entirely by imports, primarily of European species (*see* Appendix 4). In recent years total import volumes have fluctuated between 140—200 tonnes (*see* Appendix 1, Table XXI). Developing country suppliers have achieved an increasing share, in the context of year-on-year fluctuations, of up to 40% of the total in 1982. Argentina, and more recently Morocco have accounted for virtually all of the developing country total whilst supplies from other origins are dominated by Spain and Italy.

Utilisation of dried/salted anchovies is reported by trade sources to be largely confined to the production of fish pastes and also as an ingredient in sauces and salad dressings. Erratic movements in import volumes may be linked partially to the requirements of paste manufacturers, notably the decline in imports in 1980 when manufacturers discontinued production of anchovy paste as a result of high relative pricing of raw materials. Whilst some recovery in imports is evident in 1982 the market remains very small.

Potential for developing country supplies is confined by the very small size of the dried/salted anchovy market with little prospect for significant expansion. The trade also expresses a preference for European anchovy species which further limits access by developing country suppliers. Prospects will hinge upon the future performance of Spain and Italy together with Morocco who currently supply virtually the whole of market requirements.

Non-specified whole fish

Imports under the non-specified category for whole, dried/salted fish have contracted substantially from over 1,000 tonnes in 1977 to around 200 tonnes in 1982, (*see* Appendix 1, Table XXII). The bulk of imports consisting of North Atlantic species has been supplied by the Faroe Islands and Iceland and supplement some of the more important segments of the dried/smoked fish products market. Imports of developing country origin have been very small, fluctuating around an apparently downward trend to reach 50 tonnes in 1982. Developing country suppliers are largely represented by Asian countries, each supplying very small volumes.

Market outlets for dried/salted whole fish of developing country origin are difficult to identify since such small volumes are traded; however, products generally appear to be an adjunct to the larger trade in frozen exotic fish primarily serving ethnic community and restaurant trades. The potential in such markets is small since preference normally exists for fresh/frozen fish. Some supplies may also supplement the stockfish market which is primarily served by imports of European origin. With total import volumes on a declining trend, and amounting to only 50 tonnes in 1982, potential for new suppliers is very constrained.

Non-specified fish fillets

Imports of non-specific dried/salted fillets have generally fluctuated between 10 to 40 tonnes in recent years, (*see* Appendix 1, Table XXIII). Developing countries account for the greater part of supplies which are very largely of Indian origin. Total imports from the latter country in 1982 ammounted to almost 20 tonnes.

Outlets for fillets of developing country origin are similar to those for whole fish discussed in the previous sub-section, but are of even less significance. Supplies are currently dominated by India, and given such a confined market, prospects for new suppliers are negligible.

CONCLUSIONS: PROSPECTS FOR CURRENT AND POTENTIAL DEVELOPING COUNTRY SUPPLIERS

Although United Kingdom production of dried/smoked fish has declined in recent years, it remains sufficiently large to support both the bulk of domestic demand and a significant export surplus. The role of imports in the United Kingdom is correspondingly small, being confined to supplementing North Atlantic species primarily supplied by the domestic catch. The latter imports include higher value items for major markets, such as soft smoked products. Opportunities for developing country suppliers are marginal, being confined to a few peripheral/speciality items. The latter are mainly dried/salted products, some of which supplement the stockfish market provided by ethnic communities; however the bulk of this market is supplied from European origins.

The only identifiable species market where developing countries supply part of requirements is that for dried/salted anchovies. The trade preference in this market for European species, coupled with the very restricted volumes required and the absence of significant growth prospects in future, indicate that few opportunities are available to new suppliers. Other markets supplied from developing countries are essentially adjuncts to the frozen fish trade directed towards ethnic communities and restaurants (described in Section 4). Aside from stockfish, the major preference in such markets is for fresh/frozen fish and the potential for both whole and filleted dried/salted fish is marginal.

The combination of very small market size, low unit values and limited growth prospects generally provide little incentive for new suppliers of developing country origin. Markets for hard dried and smoked items are generally confined to ethnic community markets which are relatively small. Market opportunities for such products are likely to be limited to a few tonnes per annum.

Section 6

Trade issues

INTRODUCTION

This section considers a range of issues: trade structures, marketing channels, trade regulations and pricing, for products covered in the preceding sections of the report. Products are grouped together for most topics since most have common features; for example, all fish products have to meet the requirements of legislation relating to food items. The primary aim of this section is to provide potential developing country suppliers with the information which may be of value when taken in association with market prospects for specific product groups and individual products identified in Sections 2—5.

Trade structures and marketing channels are considered first, paying special attention to the initial points of contact for potential suppliers in the various product markets. Subsequent sub-sections include discussions of health regulations, packaging and labelling requirements, tariffs and quotas. Price formation and pricing are discussed and sources of price data identified. The section concludes with an outline of procedures to be followed by new suppliers to the market including contact with importers, samples, quality measures and shipment procedures.

Trade structure and marketing channels for canned fish and crustaceans

The structure of trading and companies involved in the canned fish and crustacean product market in the United Kingdom is generally quite distinct from that for other fish products. In part this distinction stems from the fact that a greater proportion of the market is supplied from imports with very limited United Kingdom production, and also because of the nature of the products themselves.

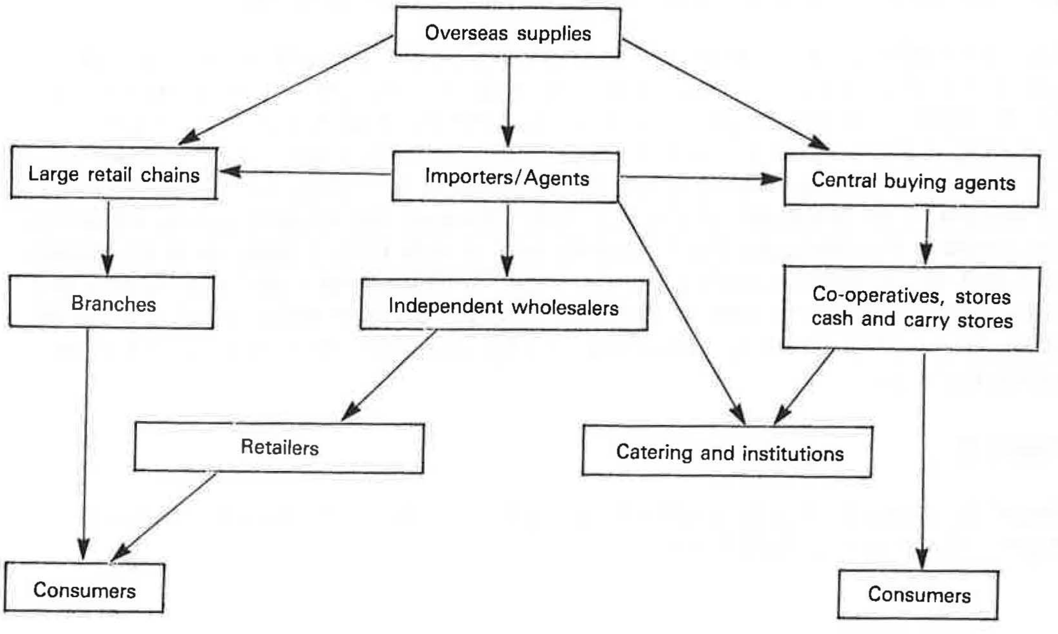
Trade channels for the product group relating to imports are illustrated in Figure 1. The most important import channel is via importers and import agents, which probably accounts for around two-thirds of total import volumes. Imports are also channelled via supermarket chains or central buying agents, each accounting for around 15% of total imports. Importers and import agents also sell to the latter two groups (*see* Figure 1).

A distinction can be drawn between larger- and smaller-scale importers and import agents. Larger-scale companies handle both fish and meat products and compete on the basis of brand shares. Two major companies, John West and Princes Buitoni account for approximately half of marketed volumes, whilst other firms with a significant range of operations include John Martin Foods and S & W Berisford. As well as importing direct, some importers and agents engage in third country trade, that is, arranging back-to-back shipment without physically handling the commodity.

Smaller-scale importers and agents tend to be more flexible with regard to the source of supply from which they will accept shipments, and perhaps in product quality. However, all importers and agents express interest in new suppliers in

Figure 1

United Kingdom trade channels: imported canned fish and crustaceans



Source: Trade sources

the context of recent fluctuations in market supply conditions (*see* Section 2). Although quite a large number of smaller-scale importers and agents are in operation, their numbers appear to have declined in recent years as a result of fluctuating market conditions.

Importers and agents generally provide storage facilities and may also act as distributors, although the latter function is also undertaken by independent transporters or by buyers themselves, for example, supermarket chains. Supermarket chains and central buying agents may act as importers in their own right, partly with a view to cutting out middlemen's costs. When importing direct, these two groups tend to import under their own labels, selling on to wholesale and retail outlets, catering and institutional markets. Importers and agents aside from sales to supermarkets and central buying agents sell to independent wholesalers (*see* Figure 1).

A list of importers of canned products is included in Appendix 7. Packaging and other requirements and procedures are discussed in the following sub-sections.

A small proportion of the United Kingdom market is supplied from United Kingdom sources, that is fish sold from the United Kingdom catch in port markets to United Kingdom processing companies. The latter sell onto wholesale and retail level, a significant proportion of production being in the form of fish pastes in jars.

Trade structure and marketing channels for other edible fish products

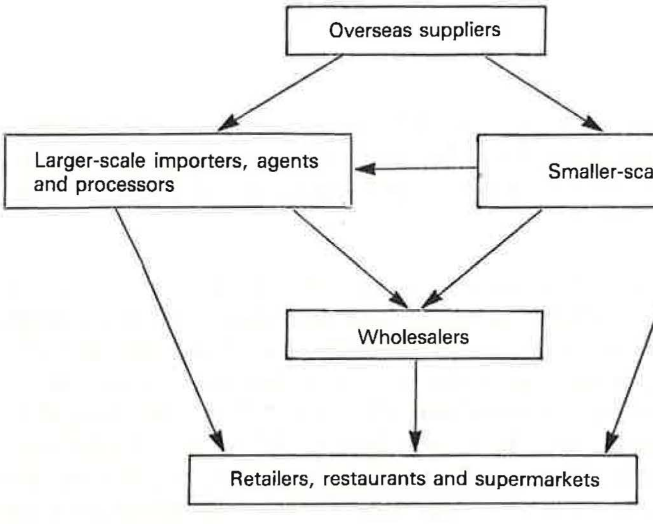
From the viewpoint of current and potential developing country suppliers, the United Kingdom trade structure for all items other than canned products can conveniently be considered as a whole, rather than divided into major product groups (i.e. fresh/processed crustaceans, fresh/frozen fish and dried/smoked fish). The reason for this procedure is that most importers handle items from all product categories, especially in the case of firms importing warm water shrimp and prawns who also normally deal in exotic fish.

Trade channels for these products are shown in Figure 2. The majority of importers concentrate upon imports of crustaceans, especially shrimp and prawns, but most firms also import exotic fish falling within the fresh/frozen and dried/smoked import categories. Some smaller-scale importers specialise in fish rather than crustacean imports. Companies also handle crustaceans and primarily minor fish species from other origins as well as from developing countries.

A fairly small number of medium-scale companies act as both importers and processors of warm water (and cold water) shrimp and prawns together with a few medium-scale import agents acting as importers alone. More important importing companies and agents include Flying Goose, Laundaur International, Sea Products International and Young's Seafoods. Larger-scale importers and agents sell to wholesalers, (including those representing specific ethnic communities, notably the Chinese), supermarkets and to cold stores (*see* Figure 2). Agents may also sell to smaller-scale processors and both importers and agents may sell small volumes direct to retailers and both engage in more substantial (re-) export trade. The main importing companies usually have their own storage and distribution facilities.

Figure 2

United Kingdom trade channels: imported fish products of developing country origin, other than canned items



Source: Trade sources

Smaller-scale importers and agents handling shrimp and prawn may sell to processors or to wholesale, retail and restaurant outlets. Some smaller-scale companies have their own storage and distribution facilities, but many rely on public stores and independent transporters. Most companies handling shrimp and prawns also handle exotic fish, whilst some specialise in fish alone. Marketing channels for fish are similar to those for shrimp and prawn, however since exotic fish are generally marketed round (that is, whole) there is very little role for processors.

In some cases, small-scale importers are members of ethnic communities with close contacts within such communities and in countries of origin, with the result that they only deal with a limited range of origins. Overall, most importers, processors and import agents, whether large- or small-scale are interested in new sources of supply, especially for shrimp and prawn.

A list of importers, etc. is included in Appendix 7. Packaging and other requirements and procedures are discussed below.

The trade structure described above only accounts for a small proportion of the total marketed volume of fresh frozen and processed fish and crustaceans. This fact arises from the dominant role played by major fresh/frozen fish markets where developing countries play almost no part in supplying market needs (*see* Section 4, p.38).

These major markets are supplied both by the domestic catch and imports, very largely of European and North American origin, channelled by port or regional markets to major fish processing companies. Catch landings include fish processed (for example, headed, gutted and sometimes filleted) and frozen at sea. A relatively small number of processing companies dominate the market, and include Bird's Eye, Findus and Ross Foods. These companies, together with smaller-scale processors sell to supermarket chains, freezer centres and the catering sector. Large-scale companies generally distribute on a national level.

This major trade and distribution structure also includes some dried and smoked products together with fresh/processed crustaceans, but both groups are insignificant in comparison to trade in fresh/frozen fish.

TRADE REGULATIONS AND REQUIREMENTS

The following sub-sections examine trade regulations and requirements for the whole range of products covered in this report, products being grouped together since many regulations and so on are common to all items. Health regulations, packaging and labelling, tariffs and quotas are each described with particular reference to products of developing country origin.

Health regulations

Health regulations relating to the import and sale of food products in the United Kingdom are very detailed and strictly applied. Whilst no specific regulations apply to edible fish products, these items have to conform to the requirements of food product legislation as a whole. Whilst strict application of health regulations may act as a disincentive to imports, United Kingdom importing companies and agents will provide full details and advice relating to requirements for specific products, (*see Procedures for developing country exporters,* p.62). Because of the complexity of regulations, the number of products involved and the fact that importers will provide comprehensive advice for individual products, this sub-section provides only a summary of major legislation and codes of practice. Addresses from which copies of legislation may be obtained are provided in Appendix 5.

The major legislation relating to imported food products include the following:

Public Health (Imported Foods) Regulations, 1937 Imports must comply with the requirements of this act and be accompanied by a certificate of origin in a form acceptable to the Ministry of Health.

Imported Food Regulations, 1968 These regulations provide for the inspection of all food imports to ensure that they meet sanitary requirements. Responsibility for inspection is vested with District Council Environmental Health Officers or with Port Health Authorities as appropriate. Responsible officers may exercise their own discretion as to precise standards to be adopted, although standard codes of practice also exist.

Trade Descriptions Acts, 1968 and 1972; Labelling of Food Regulations, 1970, 1980 *and* 1982 These acts and amendments lay down comprehensive requirements for labelling which may have associated health regulation implications.

Food and Drugs Act, 1955 This act lays down the conditions under which food products may be sold in the United Kingdom, with which imported items including fish products must conform. Particularly relevant sections of the act are parts 1, 2 and 6 relating to wholesomeness, absence of contents likely to injure health, and labelling requirements.

Detailed regulations exist relating to food additives and codes of practice also exist relating to specific product groups, such as frozen foods from overseas sources. Overall, however, the soundest approach for potential suppliers to the United Kingdom market is to obtain the advice and services of United Kingdom companies, a selection of which is provided in Appendix 7.

Trade sources generally emphasise the importance of health and quality factors, especially in relation to products of developing country origin. In a number of cases in both canned and frozen product markets health scares have made importers extremely sensitive to such issues. Such difficulties in the past have led many large- and medium-scale importers to insist on inspection of potential suppliers production facilities prior to acceptance of shipments (*see Procedures for developing country exporters*, p.62). Smaller-scale importers may not have the resources for such procedures but generally insist upon strict guarantees relating to health and quality factors, together with advice as to how standards should be met.

Packaging requirements

Packaging and labelling requirements in association with health requirements are quite complex and again potential developing country suppliers may obtain full information and assistance on the requirements for specific products from United Kingdom importers and agents. The following comments include a summary of legislation relating to the topic, together with examples of standard requirements of importers relating to products and product categories—especially for the most important items identified in Sections 2–5.

The major items of legislation relating to packaging and labelling requirements have already been identified in the previous section, that is, the Labelling of Food Regulations of 1970, 1980, and 1982 together with elements contained in other Acts such as the Food and Drugs Act, 1955 relating to labelling.

Labelling requirements are especially applicable to products imported in a form ready for final consumption, notably canned products. Importers of canned items will provide comprehensive advice on labelling and other aspects of packaging, but overall legislation requirements include the following stipulations:

- The name specification of the product (specific names have been established in the United Kingdom for individual fish products) should appear on the label
- The name of the packer or the company, for whom the product was packed should appear on the label
- A list of ingredients in descending order of weight, including any additives should appear on the label
- Various regulations concern the layout of information on the label

Importers of canned products will advise on types and sizes of cans, together with a wide range of associated issues. Some typical sizes for major products where developing countries act as significant suppliers are shown in Table 15.

In some cases, labelling legislation and requirements are applicable to items other than canned products, but in many cases, for example, for shrimp and prawn, a significant proportion of imports are subsequently processed or re-processed prior to final packing and labelling. Frozen shrimp and prawn are easily the most

Table 15

Typical data for major canned fish products supplied by developing countries

	Net weight	Can type	Cans per carton
Tuna; 'steaks' in oil/brine	100 g;200 g		48
Tuna, chunks or with vegetables	185 g		48
Pilchards, in tomato	213 g	ovals	48
Pilchards	425 g	talls	24
Sardines, in oil/tomato	120 g	club	48
Shrimp	105 g		24
Prawns	90 g; 185 g		24
Crab, queen	185 g		24
Crab, king	180 g		24
Crab, dressed	43 g		48

important market, aside from canned products, where developing countries are significant suppliers (*see* Section 3) and general packing requirements indicated by trade sources may be summarised as follows:

(i) For larger sizes (prawns), individually quick-frozen (IQF) packed in 2 kg cartons, for smaller sizes (shrimp) block-frozen or semi-IQF (i.e. with a water glaze), again packed in 2 kg cartons.

(ii) The weight of cartons refers to product weight exclusive of ice. Cartons should be waxed cardboard with approximate dimensions of 20 cm × 30 cm × 5 cm.

(iii) Blocks/cartons should be packed in a polythene bag, ten bags to a master carton comprising (at least) double-corrugated cardboard with double or (preferable) treble plastic strapping.

(iv) Blocks/cartons should, as far as possible, contain exact counts per unit of weight, for example:

under 5 s	per lb
6—8	per lb
under 10 s	per lb
11—15	per lb
16—20	per lb, etc.

Other products where developing countries are significant suppliers primarily consist of frozen exotic fish species. Within this group, fish are generally required round; that is, whole, head on, guts in. In some cases, mainly for large fish such as grouper, and for some importers, headed, gutted fish may be preferred. General packing requirements indicated by trade sources may be summarised as follows; for round fish:

— Fish graded by size, e.g. 300—600 g, over 600 g, etc.

— Fish frozen, whole in blocks, 1—2 kg per block

— Blocks should be packed in plastic, 10 to 20 blocks per master carton; total carton weight is usually between 10 to 20 kg with some trade preference for the larger 20 kg size

— Master carton should consist of (at least) double-ply cardboard, or, ideally, expanded polystyrene with double or (preferable) treble nylon strapping.

Few filleted fish are required in markets supplied by developing countries, the main exception being for species which supplement those from the domestic catch and currently are almost exclusively confined to hake. General trade requirements for packaging of fillets are:

— Block frozen, skinless and boneless fillets or skin on IQF fillets

— In both cases packed in polythene bags or 1 kg or 2 kg product weight

- Ten bags per master carton packed in an outer polythene bag
- Master cartons should be of the same materials, wrapping and strapping as for round fish

Tariffs and quotas

United Kingdom tariffs on edible fish products generally follow those of the EC and are applied on an *ad valorem* basis to c.i.f prices. There are no seasonal, global or bilateral quotas applied by the United Kingdom; however tariff quotas are applied on several items. Current United Kingdom tariffs and tariff quotas are summarised in Table 16. The table includes full duty rates, those obtaining under the General System of Preferences (GSP), those applicable to LDDCs, OCTs, and ACPs deriving tariff concessions under the Lomé convention.

Table 16

United Kingdom tariffs: summary of rates applying to products where developing countries supply part of market demand

	Full	GSP	LDDC	OCT and ACP	Footnotes
Canned fish and crustaceans:					
Salmon	6.4	4	Free	Free	(a)
Sardines	25	25	25	Free	(b)
Tuna	24	24	24	Free	
Bonito	25	19	Free	Free	
Anchovies	25	25	25	Free	
Pilchards	20	10	Free	Free	
Fish non-specified	20	10	Free	Free	
Crab	16	6.5	Free	Free	(c)
Shrimp and prawns	20	6	Free	Free	(d)
Crustaceans, non-specified	20	6	Free	Free	(e)
Molluscs, non-specified	20	6	Free	Free	(f)
Fish/processed crustaceans and molluscs					
Prawns	12	6	Free	Free	
Shrimp	18	18	18	Free	
Shrimp and prawns—other	18	6	Free	Free	(g)
Squid	6—8	4	Free	Free	(h)
Fresh/frozen fish					
Non-specified—Salmondae	Free	Free	Free	Free	
Sea bream	15	15	15	Free	
Hake whole	15	15	Free	Free	(i)
Non-specified—saltwater	15	15	Free	Free	(j)
Hake fillets	15	15	15	Free	(k)
Fillets—non-specified	15	15	15	Free	(l)
Dried/smoked fish					
Anchovies	10	10	10	Free	
Fish non-specified whole	12	12	12	Free	(m)
Fish non-specified fillets	16	16	16	Free	(n)

Source: HM Customs and Excise, *Tariff and Overseas Trade classification*, HMSO, London 1983

Notes:
(a) Except for salmon paste which attracts duty free status
(b) Tariff quotas: Morocco up to 2,190 tonnes—zero tariff and 10% on additional 938 tonnes
Tunisia up to 11 tonnes—zero tariff
(c) Except for certain species in packs over 2 kg which attract duty free status
(d) Except for shrimp and prawn for processing which attract a full duty rate of 15%
GSP and LDDC rates do not apply to shrimp of the *Crangon* spp.
(e) Except for lobster for use in pastes, etc. which attract a 10% full duty rate
(f) GSP and LDDC rates do not apply to snails
(g) For GSP and LDDC countries rates applicable for *Palaemonidae* spp. and *Peneidae* spp.
(h) For GSP and LDDC countries rates applicable for *Loligo* spp. and *Ommastrephes sagittatus* only
(i) Tariff quota for silverhake, fresh, chilled or frozen; whole, headless or pieces at 8% up to 234 tonnes, thereafter 15% rate applies for fresh and chilled fish only
(k) Tariff quota for fillets of hake for processing at 8% up to 299 tonnes, thereafter 15% rate applies
(l) Except for halibut, for which GSP rate = 10% and LDDC rate is duty free
(m) Except for saithe which attracts 8% duty. For GSP and LDDC countries, hilsa in brine attracts 8% duty
(n) Except saithe for drying which attracts a 9% duty. For GSP and LDDC countries, hilsa in brine attracts 10% duty

Two exceptions should be noted with regard to the exemptions and reduction in duties obtained by developing countries with either LDDC or ACP status. Not all LDDCs are eligible for tariff benefits, since EC resolution No 3321/80 of 1980, requires countries to provide a certificate of origin: Form A. Certain countries have yet to inform the EC of the authority nominated to issue certificates of origin (Form A) and hence are ineligible for duty reductions and exemptions. In the case of ACP countries, certain conditions apply to fish or fish products obtained by the operation of joint ventures. These conditions are summarised in Appendix 6.

From Table 16 it can be seen that full rates of duty for canned products are usually between 16% and 25% (except for salmon), the highest range in comparison to other fish product groups. GSP rates for canned products are generally lower than full rates, especially for crustaceans and molluscs. Most items are duty free for LDDS, as is the case for all products from OCT and ACP countries.

Tariffs for fresh/processed crustaceans are generally betweeen 6% and 19% at the full rate with reductions under the GSP for most items, and duty exemption in almost all cases for LDDC, OCT and ACP countries. Full and GSP rates are identical at 15% and 10%—16% respectively for fresh/frozen fish and dried/smoked fish products and again most items are duty free for LDDC countries, and in all cases for OCT and ACP states.

Tariff quotas are in operation for hake and hake fillets and canned sardines (*see* footnotes to Table 16).

Since many developing countries obtain duty exemption by their status as LDDCs, OCTs or ACP countries the effect of tariffs is muted. However many Latin American and some Asian countries do not obtain duty exemptions and are thus at a disadvantage to other developing countries. With the exception of EC member states, and to varying degrees a small number of other developed countries, the developing country group generally has an advantage over other suppliers since the latter generally attract GSP or full duty status.

PRICE FORMATION AND PRICING

This section first examines actual price data and sources of information before turning to some of the major factors influencing pricing in major product groups. The section concentrates on product markets where developing countries are significant sources of supply to the United Kingdom.

It is very difficult to present a comprehensive picture of actual product pricing for all the items covered by this study. Factors contributing to this difficulty include the following:

—Price data is not readily available for a number of products, particularly exotic fresh/frozen fish. Trade sources are often unwilling to provide price quotes for such items

—For some items, most notably fresh/processed crustaceans and molluscs a large range of price quotes is available at any one point in time. In the case of shrimp and prawn for example, 50 to 60 price quotes (for products of developing country origin) may be commonly available depending upon origin, species, and especially counts per lb

—A range of price quotas is also often available as a result of differing levels of processing, for example, whole or headless and gutted, filleted fish, with or without skin, etc. In the case of canned products, different price quotes relate to can size and type, packing medium and product specification as well as origin

—Time series data are difficult to collate since for a number of items considerable price fluctuation may occur on a day-to-day basis, and as noted above a very large number of price quotes have to be followed for some products, whilst for others almost no price data are available

As a result of such problems Table 17 provides only a summary of relative prices covering the major products where developing countries provide a significant volume of United Kingdom market requirements. The table provides an indicator of relative values of products, since although such values fluctuate as a result of seasonal supply factors, the broad pattern has remained fairly stable.

Table 17 shows that frozen shrimp and prawns are the highest value item, although pricing can only be expressed as a range, depending upon the counts per pound. Mid-range counts are generally in the region of £5,000 per tonne. Canned crustaceans are the second most valuable commodity, with prices for shrimp and crab in the range £3,000—£4,000 per tonne.

Table 17

Selected price data: fish products of developing country origin†

Product/product group	Price: £ per tonne‡	Notes
Canned products:		
Tuna, solid, in oil	2,065	7 oz, 48 per case
Tuna, chunks, in oil	1,670	6.5 oz, 48 per case
Tuna, solid, in brine	2,000	7 oz, 48 per case
Tuna, chunks, in brine	1,670	6.5 oz,48 per case
Bonito, chunks, in oil	1,670	6.5 oz, 48 per case
Bonito, chunks, in brine	1,590	6.5 oz, 48 per case
Sardines, in oil	1,160	125 g, club cans
Pilchards, in tomato	590	15 oz,24 per case, talls
Crab	3,780	Grade A, 6 oz, 24 per case
Shrimp	3,290	Cocktail, 4.5 oz, 24 per case
Fresh/processed crustaceans and molluscs:		
Shrimp and prawn 16/20 per lb	6,950	Frozen block, peeled and deveined
Shrimp and prawn 36/40 per lb	5,695	Frozen block, peeled and deveined
Shrimp and prawn 71/90 per lb	4,885	Frozen block, peeled and deveined
Shrimp and prawn 200/300 per lb	2,370	Frozen block, peeled and deveined
Squid under 10 per kg	1,980	Frozen block, tubes
20/40 per kg	1,475	Frozen block, tubes
60/80 per kg	1,140	Frozen block, tubes
Fresh frozen fish:		
Swordfish	1,370	Dead weight, IQF
Red snapper	1,140	Eviscerated, IQF
Red mullet	1,140	Whole, block frozen
Hake, headed and gutted	490	Block frozen
Hake, fillets	705	Block frozen

Sources: Derived from data in *Infofish Trade News*, *Infopesca Market News and Price Report*, and *Fish Trader*

Notes: †Price quotations for items of developing Country origin, c. & f. or c.i.f., United Kingdom and European ports
‡To the nearest £5 per tonne, August 1983

Canned fish products are generally of lower value, in the range of £1,000—£2,000 per tonne, except for pilchards which are lower still. Prices per species for some canned products again can only be presented as a range depending upon packing medium and product type, for example, solid or chunk packs, the latter generally being lower priced. Prices of frozen exotic fish are generally at the lower end of the range for canned products, that is, in the range of £1,000—£1,500 per tonne.

The lowest priced items shown are for frozen hake, where even filleted fish fetch only around £700 per tonne, and canned pilchards at around £600 per tonne. Hake is one of the few species supplied by developing countries where EC reference prices (i.e. minimum import prices) are imposed, but as a downmarket item prices nonetheless remain relatively low.

Reference prices also apply to sea bream and squid which fall in intermediate price range products.

Sources of market price data are provided in Appendix 8. Sources most readily available and with the widest range of price data are probably provided by *Infofish Trade News* and *Infopesca Market News and Price Report*. These two publications cover the whole range of major product markets and include price quotes for European destinations from a range of origins.

Two United Kingdom publications, *Fishing News* and *Fish Trader* regularly publish price data, but this is primarily confined to port and regional markets, covering only a limited range of frozen items (The main emphasis being on wet fish and shellfish). The latter two publications do not carry price data for canned products. Another United Kingdom publication, *The Grocer*, carries wholesale price data relating to fresh fish and shellfish. In a few cases United Kingdom importers listed in Appendix 7 may provide price quotations but most prefer to trade from the basis of initial price offers made by suppliers.

The relative importance of market factors in price formation varies to some extent between major product groups, each of which is briefly discussed below.

In the case of many canned products, most notably tuna, the United Kingdom represents only a minor segment of the international market despite its almost total reliance on imports. Changes in supply and demand relationships elsewhere, notably in Europe and North America, have a strong influence over international price trends. Although United Kingdom importers are essentially price takers, certain features have arisen within the United Kingdom market. Developing country suppliers have, for a number of items, supplied lower-priced products, but because these have sometimes been of poor quality, an initially favourable price response has been followed by a sharp drop in demand. Fluctuating relative exchange rates have also influenced the pattern of imports to a degree, particularly the relative strength of the £ sterling against the US dollar and against European currencies. Particular weakness of the £ sterling against the US dollar may favour origins pricing in European-linked currencies.

With the exception of shrimp and prawn the bulk of the United Kingdom market for fresh/processed crustaceans and molluscs is met from domestic sources with prices largely determined by catch levels and domestic and export demand. In contrast, the shrimp and prawn market is broadly divided between cold and warm water species which although inter-related are subject to differing price factors. Cold water species prices are influenced both by domestic and European supplies which have fluctuated in the context of quite strong demand. Warm water varieties of developing country origin are regarded as a downmarket substitute and hence command lower prices generally than is the case for cold water species. However, the market for warm water species is of worldwide significance, where United Kingdom market demand is of only limited importance. As in the case for canned products, price formation is heavily influenced by major import markets elsewhere, notably Japan and the USA. Strength of demand in the latter markets may make the United Kingdom appear a relatively unattractive outlet. Currency factors may also be significant, as described for canned products.

By far the largest segment of the United Kingdom edible fish product market is that for fresh/frozen fish. The latter is supplied both by the United Kingdom catch and from European and North American supplies. Price formation is thus heavily influenced by the relative importance of supplies from these two sources in the context of slowly rising consumer demand. The trend towards increasing imports in recent years (*see* Section 4) has increased the importance of availabilities outside the United Kingdom, although the domestic catch continues to be a major factor with strong seasonal variations. The fresh/frozen fish sector is the only major product group where reference prices are commonly applied under EC regulations. Such prices however apply to major species in the group rather than exotics which are virtually the only area aside from hake where developing countries play a supplying role.

Most fresh/frozen and dried/smoked fish markets supplied by developing countries are very small and are orientated to specialistic/ethnic community outlets. Given the very small size of such markets even small fluctuations in supply have very considerable destabilizing effects on pricing.

PROCEDURES FOR DEVELOPING COUNTRY EXPORTERS

This final section provides an outline of procedures to be followed which may be of particular assistance to potential new suppliers. Procedures are broadly similar for all products covered in this study, but where points specific to individual products arise, these are noted in the text. Within the procedures outlined a broad distinction may be drawn between large and smaller-scale importers and agents. Larger-scale companies are generally more likely to request and/or require a visit to potential suppliers production facilities, than smaller-scale importers.

Procedures for potential suppliers may be summarised as follows:

- Initial contact with United Kingdom importers may be made by letter or directly at United Kingdom and European food fairs (*see* Appendix 7). Letters should provide details of products offered, details of sales elsewhere; presentation of information in the form of a brochure is likely to have a more favourable impact, especially for larger-scale importers. In the case of frozen exotic fish, information should include, if possible, the Latin names of species offered and a good quality photograph of each fish species.
- If interested, importers will normally respond by asking for samples, in all cases samples should comprise a carton or master carton of products concerned, packed as described in *Packaging requirements*, p.56. For major importers of canned products, samples may be sent with initial letters of introduction/brochures. Samples should be sent airfreight and are not likely to be subject to duty. Larger-scale importers of canned goods may respond with a questionnaire/request for further details of operations of potential suppliers and usually expect a visit from the latter prior to engaging in trade.
- Larger-scale importers of all items will often request and/or require a visit to the production facilities of potential suppliers. Such visits may be used to finalise details of production, packaging and labelling, with special reference to product quality and United Kingdom health and food legislation (*see Health* regulations, p.55 and *Packaging requirements*, p.56). Smaller scale importers are less likely to visit potential suppliers.
- In the case of shrimp and prawns, product requirements favour headless, shell-on-products which can be further processed in the United Kingdom. However some head-on uncooked as well as cooked/peeled supplies are accepted.
- Price quotations for all products should generally be expressed in £ sterling or US dollars, c. & f. or c.i.f. Europe, although some importers of canned products may accept f.o.b. quotations initially. Financing is generally by a letter of credit.
- Once trade is established the minimum size of shipment for all products is usually one container-load. Exceptions arise for some high-value categories of shrimp and prawn (for example, freshwater king prawns) where half container-loads may be acceptable and for exotic fish, where importers accept supplies in master cartons.
- Some importers of shrimp and prawns prefer to ship via continental ports (for example, Rotterdam or Antwerp) and then by road/sea link to the United Kingdom. Airfreight may occasionally be used for high-value speciality items.

— Some importers prefer to establish long-term links with suppliers and/or to act as sole agents. In the latter case suppliers may be advised to ensure that minimum shipment volumes are stipulated in contracts.

— Trade sources suggest that, because of stringent quality control requirements, it may be easier for some developing country suppliers to operate joint ventures if they wish to supply the United Kingdom market. However, ACP country suppliers would need to take account of duty exemption conditions applying to joint ventures indicated in Appendix 6.

In general, potential exporters should attempt to maintain a high standard of business operations in order to build up and sustain market penetration, paying particular attention to:

- consistency of quality of products
- promptness in communications and in shipments
- rapid explanation for any problems or delays arising in shipment
- provision of samples as required

Lists of importers are included in Appendix 7, together with trade fairs and trade associations and in addition to points raised in this section further information and contact points relating to health regulations and packaging are included in Appendices 5 and 6 respectively.

Appendices

APPENDIX 1: TABLES

Table I

Gross imports: canned salmon

tonnes

	1977	1978	1979	1980	1981	1982
Total	14,094	13,973	14,804	24,232	29,549	16,179
of which:						
Developing countries	13	—	—	—	76	123
of which:						
Korea	—	—	—	—	63	118
Dubai	—	—	—	—	13	—
Other countries	14,081	13,973	14,804	27,232	29,473	16,061
of which:						
Canada	5,908	5,669	5,907	13,595	14,378	7,203
USA	2,971	4,549	6,801	9,232	11,260	6,739
Soviet Union	2,143	1,090	1,976	1,074	3,109	1,343

Source: United Kingdom trade returns, SITC (R2) 037.1 Code No. 1604 3100

Table II

Gross imports: canned tuna

tonnes

	1977	1978	1979	1980	1981	1982
Total	6,933	6,846	9,533	9,360	17,720	12,537
of which:						
Developing countries and territories	2,702	2,854	5,285	5,528	8,830	7,980
of which:						
Ivory Coast	199	240	699	1,359	1,933	2,625
Fiji	639	788	1,762	1,025	2,130	1,642
Philippines	—	13	—	93	1,266	1,228
Mauritius	285	487	718	789	812	1,111
Thailand	35	9	55	102	243	429
Senegal	62	—	—	397	867	349
Solomon Islands	—	—	760	834	820	347
Malaysia	3	173	372	272	94	107
Singapore	—	—	31	70	208	61
Taiwan	16	7	83	50	76	34
Indonesia	27	—	—	—	52	34
Other countries	4,231	3,992	4,248	3,832	8,890	4,557
of which:						
Japan	3,965	3,750	3,898	3,823	5,887	3,764

Source: United Kingdom trade returns, SITC (R2) 037.1 Code No. 1604 7500

Table III

Gross imports: canned pilchards

tonnes

	1977	1978	1979	1980	1981	1982
Total	20,866	5,336	11,268	10,790	12,558	14,027
of which:						
Developing countries	124	1,203	3,107	5,753	8,842	11,229
of which:						
Peru	110	575	1,694	3,111	6,300	9,518
Chile	14	213	1,077	2,524	2,542	1,711
Other countries	20,742	4,133	8,161	5,037	3,716	2,798
of which:						
Japan	38	1,277	5,937	4,526	3,170	2,361
South Africa	20,659	2,719	2,143	384	33	—

Source: United Kingdom trade returns, SITC (R2) 037.1 Code No. 1604 9810

Table IV

Gross imports: canned sardines

tonnes

	1977	1978	1979	1980	1981	1982
Total	7,571	7,373	7,590	6,835	8,567	8,233
of which:						
Developing countries	1,127	1,541	3,157	2,820	3,656	915
of which:						
Morocco	1,127	1,525	3,089	2,771	3,523	839
Peru	—	2	26	36	79	56
Paraguay	—	—	—	—	—	20
Other countries	6,444	5,832	4,433	4,015	4,911	7,318
of which:						
Portugal	1,954	3,065	2,890	2,262	3,086	4,688
Italy	14	58	252	891	1,053	2,123
Spain	2,226	1,628	1,170	822	551	484

Source: United Kingdom trade returns, SITC (R2) 037.1 Code No. 1604 7100

Table V

Gross imports: canned bonito

tonnes

	1977	1978	1979	1980	1981	1982
Total	623	407	755	1,154	1,482	771
of which:						
Developing countries	583	398	755	1,029	1,439	681
of which:						
Peru	559	344	503	617	945	265
Thailand	22	36	136	291	349	259
Malaysia	—	5	53	40	28	144
Philippines	—	13	—	13	89	13
Other countries	40	9	—	125	43	90

Source: United Kingdom trade returns, SITC (R2) 037.1 Code No. 1604 8200

Table VI

Gross imports: canned anchovies

tonnes

	1977	1978	1979	1980	1981	1982
Total	349	280	273	328	335	279
of which:						
Developing countries	9	23	30	49	52	54
of which:						
Morocco	9	23	30	44	43	53
Other countries	340	257	243	279	283	225
of which:						
Spain	236	135	117	98	114	104
France	20	47	36	84	79	53
Italy	25	34	19	49	72	51

Source: United Kingdom trade returns, SITC (R2) 037.1 Code No. 1604 8500

Table VII

Gross imports: non-specified canned fish†

tonnes

	1977	1978	1979	1980	1981	1982
Total	3,311	5,319	4,483	4,720	5,915	7,477
of which:						
Developing countries	43	52	64	41	52	17
of which:						
Hong Kong	9	7	9	17	19	11
Singapore	13	16	9	19	10	1
Other countries	3,268	5,267	4,419	4,679	5,863	7,460
of which:						
Denmark	2,867	4,679	4,036	4,103	5,126	6,569
Norway	267	331	147	352	414	388

Source: United Kingdom trade returns, SITC (R2) 031.7 Code No. 1604 9898

Note: †The category in practice includes large volumes of non-specified products *not* packed in cans

Table VIII

Gross imports: canned shrimp and prawns

tonnes

	1977	1978	1979	1980	1981	1982
Total	n.a.	n.a.	811	1,473	1,058	1,395
of which:						
Developing countries	n.a.	n.a.	565	1,085	723	1,107
of which:						
Thailand	n.a.	n.a.	27	187	314	849
Pakistan	n.a.	n.a.	438	333	214	127
India	n.a.	n.a.	77	513	166	73
Hong Kong	n.a.	n.a.	*	35	1	29
Singapore	n.a.	n.a.	5	5	16	21
Malaysia	n.a.	n.a.	17	12	12	12
Other countries	n.a.	n.a.	246	388	335	288
of which:						
USA	n.a.	n.a.	49	129	48	148
Denmark	n.a.	n.a.	56	51	48	45
Norway	n.a.	n.a.	12	—	100	41
Netherlands	n.a.	n.a.	66	102	82	19

Source: United Kingdom trade returns, SITC (R2) 037.2 Code No. 1605 3010

Notes: n.a. = not available, since before 1979 no separate trade classification existed.
* = below 500 kg

Table IX

Gross imports: canned crab

tonnes

	1977	1978	1979	1980	1981	1982
Total	522	577	931	1,735	1,788	1,572
of which:						
Developing countries	108	171	248	747	541	651
of which:						
Thailand	57	159	244	487	416	534
Malaysia	—	—	3	111	48	99
Singapore	—	—	—	37	42	18
Other countries	414	406	683	988	1,247	921
of which:						
Canada	130	124	283	673	882	523
Norway	211	131	195	142	172	174

Source: United Kingdom trade returns, SITC (R2) 037.2 Code No. 1605 2000

Table X

Gross imports: canned non-specified crustaceans

tonnes

	1977	1978	1979	1980	1981	1982
Total	n.a.	n.a.	9,437	10,307	10,580	12,128
of which:						
Developing countries	n.a.	n.a.	3,924	4,205	3,041	2,773
of which:						
Malaysia	n.a.	n.a.	3,328	3,923	2,868	2,042
Thailand	n.a.	n.a.	210	113	95	490
Singapore	n.a.	n.a.	12	13	11	70
India	n.a.	n.a.	231	17	8	47
Brazil	n.a.	n.a.	—	—	20	40
Hong Kong	n.a.	n.a.	—	33	6	35
Nepal	n.a.	n.a.	—	20	—	30
Philippines	n.a.	n.a.	2	3	6	13
Chile	n.a.	n.a.	20	3	1	1
Pakistan	n.a.	n.a.	—	—	23	1
Other countries	n.a.	n.a.	5,549	6,102	7,539	9,355
of which:						
Norway	n.a.	n.a.	2,635	3,017	3,628	5,173
Denmark	n.a.	n.a.	987	1,251	1,451	2,031
Iceland	n.a.	n.a.	499	531	704	745
Canada	n.a.	n.a.	852	678	840	737

Source: United Kingdom trade returns, SITC (R2) 037.2 Code No. 1605 3099

Note: n.a. = not available; before 1979 classification includes canned shrimp and prawn, hence data are not comparable

Table XI

Gross imports: canned non-specified molluscs

tonnes

	1977	1978	1979	1980	1981	1982
Total	4,548	1,151	1,038	882	1,126	1,616
of which:						
Developing countries and territories	1,919	68	40	98	89	132
of which:						
Thailand	19	—	2	18	12	66
Korea	20	30	15	41	43	47
Singapore	18	12	7	13	11	12
Taiwan	10	9	15	10	20	6
Hong Kong	27	14	1	12	1	1
Other countries	2,629	1,083	998	784	1,037	1,484
of which:						
Netherlands	243	306	204	73	184	562
Denmark	639	486	578	513	610	454

Source: United Kingdom trade returns, SITC (R2) 037.2 Code No. 1605 5000

Table XII

Gross imports: fresh/processed prawns (of family *Pandalidae*)

tonnes

	1977	1978	1979	1980	1981	1982
Total	3,809	7,733	6,857	8,051	5,151	5,189
of which:						
Developing countries and territories	94	74	150	239	405	210
of which:						
Pakistan	5	—	—	4	72	64
Thailand	—	—	11	—	84	52
Gambia	—	—	3	—	20	39
Liberia	—	—	—	—	—	15
Taiwan	—	—	3	—	—	11
Malaysia	30	—	21	29	82	10
Sierra Leone	—	—	31	—	—	10
Singapore	9	7	12	26	3	4
Tanzania	1	9	32	—	2	3
Bangladesh	20	*	29	29	4	2
Other countries	3,715	7,659	6,707	7,812	4,746	4,979
of which:						
Denmark	1,549	1,966	1,620	2,397	2,751	2,520
Irish Republic	389	529	634	236	419	833
France	78	108	99	86	159	315
Norway	824	798	253	245	159	268

Source: United Kingdom trade returns, SITC (R2) 036.0 Code No. 0303 4310

Note: * = below 500 kg

Table XIII

Gross imports: fresh/processed shrimp (*Crangon* spp.)

tonnes

	1977	1978	1979	1980	1981	1982
Total	253	519	1,072	692	513	343
of which:						
Developing countries	54	220	194	99	20	41
of which:						
Sierra Leone	—	43	32	69	2	23
Liberia	—	129	124	20	—	18
Hong Kong	12	11	—	1	1	*
Other countries	199	299	878	593	493	302
of which:						
France	69	60	123	77	90	97
Germany Fed. Rep. of	—	35	437	233	56	85
Belgium/Luxembourg	—	—	—	—	—	57

Source: United Kingdom trade returns, SITC (R2) 036.0 Code No. 0303 4321 Code No 0303 4329

Note: * = below 500 kg

Table XIV

Gross imports: other fresh/processed shrimp and prawns

tonnes

	1977	1978	1979	1980	1981	1982
Total	2,010	3,360	4,889	6,866	6,508	8,816
of which:						
Developing countries	1,006	1,843	2,725	4,002	4,512	7,159
of which:						
India	109	605	1,360	2,388	2,587	3,949
Pakistan	68	50	71	273	694	1,334
Thailand	51	371	491	648	480	722
Bangladesh	147	191	236	410	262	591
Sierra Leone	5	13	72	128	243	258
Malaysia	134	249	149	43	16	180
Hong Kong	*	64	28	30	28	53
Singapore	17	50	71	8	19	35
Kenya	—	—	—	—	—	22
Burma	—	—	—	—	10	8
Indonesia	16	5	131	18	10	2
Other countries	1,004	1,517	2,164	2,864	1,996	1,657
of which:						
Netherlands	307	488	898	1,650	895	617
China	71	106	469	454	618	352
Belgium/Luxembourg	203	318	215	212	67	240
France	249	233	301	228	207	222

Source: United Kingdom trade returns, SITC (R2) 036.0 Code No. 0303 4390

Note: * = below 500 kg

Table XV

Gross imports: frozen squid

tonnes

	1977	1978	1979	1980	1981	1982
Total	375	543	930	717	706	548
of which:						
Developing countries	7	84	43	29	67	70
of which:						
Singapore	—	—	—	14	10	36
Thailand	—	—	—	—	20	29
Hong Kong	—	—	—	—	6	3
Argentina	—	70	43	11	11	—
Other countries	368	459	887	688	639	478
of which:						
USA	253	396	675	459	523	395

Source: United Kingdom trade returns, SITC (R2) 036.0 Code No. 0303 6811
Code No. 0303 6819
Code No. 0303 6860

Table XVI

Gross imports: frozen hake (whole)

tonnes

	1977	1978	1979	1980	1981	1982
Total	4,642	3,700	3,874	1,886	1,738	532
of which:						
Developing countries	1,706	1,326	1,180	1,197	776	32
of which:						
Uruguay	5	7	408	525	300	32
Argentina	1,181	1,236	695	498	476	—
Other countries	2,936	2,374	2,694	689	962	500
of which:						
South Africa	2,575	1,269	2,085	665	937	481

Source: United Kingdom trade returns, SITC (R2) 034.2 Code No. 0301 7650

Table XVII

Gross imports: frozen hake fillets

tonnes

	1977	1978	1979	1980	1981	1982
Total	4,816	3,570	2,730	1,166	711	236
of which:						
Developing countries	4,170	2,818	2,561	933	687	204
of which:						
Uruguay	50	2	174	69	306	170
Brazil	20	—	—	—	—	24
Peru	—	7	7	—	10	10
Argentina	3,859	2,809	2,314	847	371	—
Other countries	646	752	169	233	24	32

Source: United Kingdom trade returns, SITC (R2) 034.4 Code No. 0301 9740

Table XVIII

Gross imports: frozen sea bream (*Dentex dentex* and *Pagellus*)

tonnes

	1977	1978	1979	1980	1981	1982
Total	499	681	775	493	468	347
of which:						
Developing countries	227	500	208	224	336	86
of which:						
Argentina	158	266	74	144	336	83
Korea	—	—	79	8	—	—
Other countries	272	181	567	269	132	261
of which:						
Canary Islands	132	89	419	36	76	218
South Africa	6	—	133	59	—	43

Source: United Kingdom trade returns, SITC (R2) 034.2 Code No. 0301 6900

Table XIX

Gross imports: frozen *salmonidae*, non-specified

tonnes

	1977	1978	1979	1980	1981	1982
Total	145	576	529	2,423	824	662
of which:						
Developing countries and territories	137	440	234	350	770	630
of which:						
Bangladesh	137	418	203	270	524	519
Thailand	—	—	—	—	24	78
Pakistan	—	14	6	70	88	15
Taiwan	—	—	—	—	84	9
Hong Kong	—	—	15	—	12	4
India		8	5	9	*	4
Other countries	8	136	295	2,073	54	32
of which:						
Canada	1	92	228	2,027	—	—

Source: United Kingdom trade returns, SITC (R2) 034.2 Code No. 0301 1200

Note: * = below 500 kg

Table XX

Gross imports: frozen non-specified fish fillets

tonnes

	1977	1978	1979	1980	1981	1982
Total	2,531	4,045	2,307	2,286	2,179	3,807
of which:						
Developing countries	216	125	80	165	12	76
of which:						
Argentina	5	39	11	—	—	36
Uruguay	—	1	39	104	—	36
Singapore	194	58	30	43	2	4
India	*	1	—	—	6	—
Other countries	2,315	3,920	2,227	2,121	2,167	3,731
of which:						
France	63	86	19	13	20	1,194
Iceland	22	48	505	249	485	1,074
Norway	1,013	365	250	288	380	502

Source: United Kingdom trade returns, SITC (R2) 034.4 Code No. 0301 9790

Note: * = below 500 kg

Table XXI

Gross imports: dried/salted anchovies

tonnes

	1977	1978	1979	1980	1981	1982
Total	167	247	241	141	140	190
of which:						
Developing countries	20	25	53	20	55	81
of which:						
Morocco	—	2	16	2	31	78
Argentina	19	19	17	15	21	—
Other countries	147	222	188	121	85	109
of which:						
Spain	17	143	92	39	51	64
Italy	110	63	95	82	26	42

Sources: United Kingdom trade returns, SITC (R2) 035.03 Code No. 0302 1500

Table XXII

Gross imports: dried/salted non-specified whole fish

tonnes

	1977	1978	1979	1980	1981	1982
Total	1,184	846	847	183	208	234
of which:						
Developing countries	89	70	80	20	59	51
of which:						
Hong Kong	28	19	28	—	25	24
Bangladesh	22	13	14	10	11	10
Singapore	16	8	12	—	8	6
Venezuela	5	10	8	—	5	5
Malaysia	1	2	5	—	4	*
Other countries	1,095	776	767	163	149	183
of which:						
Iceland	198	334	186	12	12	88
Denmark	—	—	—	*	—	80
Faroe Islands	649	375	522	51	80	—

Source: United Kingdom trade returns, SITC (R2) 035.03, Code No. 0302 1900

Note: * = below 500 kg

Table XXIII

Gross imports: dried/salted non-specified fillets

tonnes

	1977	1978	1979	1980	1981	1982
Total	64	19	14	40	29	209
of which:						
Developing countries	44	13	13	36	18	21
of which:						
India	40	11	12	35	16	19
Other countries	20	6	1	4	11	190
of which:						
Irish Republic	—	4	1	2	2	163

Source: United Kingdom trade returns, SITC (R2) 035.03 Code No. 0302 2890

APPENDIX 2: DATA SOURCES USED IN THE STUDY: PROBLEMS OF ASSESSING MARKET DEMAND

Difficulties in assessing accurately the level of market demand for the products covered in this study have been referred to briefly in the main text (Sections 1—5). This appendix identifies some of the major problems which arise, together with the approach adopted in an attempt partially to overcome such difficulties.

Three sources are available from which estimates of marketed volumes may be derived:

(1) United Kingdom catch, fish product production and net trade data (derived from official statistics).

(2) United Kingdom consumption data (from official household consumer survey information and population statistics).

(3) Estimates given by private trade sources of production and consumption levels.

None of these sources is satisfactory in providing accurate and detailed data at an individual product level for United Kingdom consumption/market demand and trends in the latter over time. In the case of the first source, problems include:

- The significant volumes of fish and fish waste used in non-edible products such as fishmeal and petfood, where limited data are available on precise volumes per species utilised.
- Edible fish products are also processed to varying degrees entailing differing levels of waste/losses through processing and again little data on volumes per species are readily available.
- Stock changes cannot be accounted for, a particularly important factor in the case of canned products.
- Trade data are not fully satisfactory since products with differing levels of processing and/or species are included in the same category in a number of instances and non-specified categories often account for significant import/ export volumes.

A simpler alternative (from the point of view of computation) is to utilise source (2) above, i.e. household consumption and population data, but two drawbacks arise:

- Easily the most important problem is the lack of disaggregation of published consumption data which only distinguish a few major product groups with no break-down by species.
- Figures on consumption are in the form of ounces per capita per week to two decimal places, which provide only approximate figures when scaled up on an annual basis for the total population.

The third alternative is to use estimates provided by trade sources where again a number of difficulties occur:

- Only a relatively small number of large and medium-scale companies undertake market analysis, which is also of varying degrees of sophistication.
- In some cases, including products of interest to developing country suppliers, markets are quite fragmented, with few large or medium-scale firms operating in the market.
- Even where trade sources have market data they may be (understandably) unwilling to divulge it or have it published.

In this study all three sources have been drawn upon, choosing whichever provides the most accurate or appropriate range of data. For overall consumption levels by major product groups, household consumption data has been used as a guide although no coverage is available for dried/cured fish. Within major product groups, United Kingdom catch, production and trade data are used to identify major products and species traded, although these data can generally be used only to identify approximate orders of magnitude. At the most detailed level of analysis, that is for individual products of special interest to developing country suppliers, most reliance is placed upon import data together with trade estimates. Trends in import volumes represent the prime area of concern to actual and potential suppliers, although these clearly have to be placed in the context of market trends more generally. Where official trade statistics are inadequate, notably where trade classifications group products into non-specified categories, it has been possible to identify the greater part of traded products and species via interviews with trade sources. The latter comment applies particularly to trade in exotic fish species discussed in Section 4.

APPENDIX 3: THE COMMON FISHERIES AGREEMENT

The ten EC member countries agreed a Common Fisheries Policy in 1982 which replaced temporary arrangements included in the accession treaty of 1972, when the United Kingdom, Denmark and the Irish Republic joined the community. Major features of the agreement include:

— Regulation of access by fishing vessels of member states to EC waters

— Quotas (i.e. Total Allowable Catches), for each country and species of fish in EC waters

— A three-year programme of financial aids to fishing fleets in the Community

— A series of agreements on fisheries with non-EC countries

— Regulations for fish imports into EC countries.

Whilst EC countries including the United Kingdom are committed to expanding trade in fish and fish products to meet consumer demand, they also have a commitment to safeguarding the fishing industry within the Community. In respect of the latter, regulations concerning imports of fish and fish products are particularly significant. EC countries may impose countervailing duties on fish and fish products where import prices fall below reference prices (that is, minimum import prices), which are agreed annually.

Reference prices are currently (1983) applied to products falling within the fresh/frozen fish category together with fresh/chilled shrimp (*Crangon* spp.). Reference prices apply to major fish species such as cod, haddock, plaice, etc. Only three species where developing countries supply part of United Kingdom market requirements fall within the reference price system. These species are hake, seabream and squid.

APPENDIX 4: ENGLISH AND LATIN NAMES OF SPECIES REFERRED TO IN THE STUDY

This appendix contains a complete list of all English names of species of fish and shellfish referred to in this study. Latin names of species and subspecies are given against their English equivalent, but the list of Latin names is not intended to be comprehensive. Latin names listed cover most of the species or sub-species currently accepted in United Kingdom markets, but these exclude a large number of species or sub-species that are little known or have yet to be accepted by importers. The lists concentrate on species where developing countries currently supply a part of United Kingdom requirements, but also include a selection of the major species referred to in the main body of the study.

Fish

English		*Latin*
Anchovies	—	*Engraulis* spp., e.g. *Engraulis encrasicolus* (European)
Blue whiting	—	*Micromesistius poutassou, Gadus poutassou*
Bonito	—	*Sarda* spp., e.g. *Sarda sarda* (Atlantic)
Brisling*	—	*Sprattus sprattus sprattus*
Cod	—	*Gadus* spp., e.g. *Gadus morhua, Gadus ogac, Boreogadus saida*
Grouper	—	*Epinephelus* spp.
Haddock	—	*Melanogrammus aeglefinus*
Hake	—	*Merluccius* spp., e.g. *Merluccius merluccius* (European), *Merluccius hubbsi*
Herring	—	*Clupea harengus harengus*
Lemon sole	—	*Microstomus kitt*
Mackerel	—	*Scomber scombrus, Scomber japonicus*
Norway pout	—	*Trisopterus esmarkii*
Pilchards	—	*Sardina pilchardus, Sardinops sagax* (Pacific)
Plaice	—	*Pleuronectes platessa*
Pollock (saithe)	—	*Pollachius virens*
Red mullet	—	*Mullus surmuletus*
Red snapper	—	certain *Lutjanus* spp.
Salmon	—	*Salmo salar, Oncorhynchus gorbuscha, Oncorhynchus nerka*
Sandeels	—	*Ammodytes* spp.
Sardines	—	*Sardina pilchardus*
Sea bass	—	*Serranidae family*
Sea bream	—	*Pagellus* spp., *Dentex* spp., *Sparus* spp.
Sild†	—	*Clupea harengus harengus*
Silver pomfret‡	—	*Pampus argenteus*
Skipjack (tuna)	—	*Katsuwonus pelamis*
Sole (common)	—	*Solea vulgaris vulgaris*
Sprats	—	*Sprattus sprattus sprattus*
Swordfish	—	*Xiphias gladius*
Trout	—	*Salmo* spp.
Tuna	—	*Thunnus* spp., *Euthynnus* spp.
Whiting	—	*Merlangus merlangus*

Shellfish

English		*Latin*
Blue mussels	—	*Mytilus edulis*
Cockles	—	*Cardium edule*
Crab	—	*Paralithodes camchaticus, Chionoecetes* spp., *Callinectes sapidus*

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*Scandinavian name for sprats
†Scandinavian name for herring
‡known in the trade as white pomfret

Shellfish—*continued*

English		*Latin*
Crawfish	—	*Palinurus* spp., *Panulirus* spp., *Jasus* spp.
Lobster	—	*Homarus* spp.
Norway lobster	—	*Nephrops norvegicus*
Oyster	—	*Ostrea edulis, Crassostrea angulata*
Periwinkles	—	*Littorina littorea*
Prawns	—	*Pandalidae* families, *Penaeidae* families
Scallops	—	*Pecten maximus, Chlamys opercularis*
Shrimp	—	*Crangon crangon, Pandalus montagui*
Snails	—	*Helix promatia, Helix aspersa*
Squid	—	*Loligo* spp., *Illex* spp., *Omnastrephes sagittatus*
Whelks	—	*Buccinum undatum*

APPENDIX 5: SOURCES OF INFORMATION: HEALTH REGULATIONS AND GOVERNMENT AGENCIES INVOLVED

The Ministry responsible for health, product specification, labelling and marketing standards is:

Ministry of Agriculture, Fisheries and Food
Food Standards Science and Safety Division
Great Westminster House
Horseferry Road
London SW1 P2AE
United Kingdom   Tel: 01 839 7711

Copies of United Kingdom health legislation, *see Health regulations*, p.55, can be obtained from:

HMSO Books
4a High Holborn
London WC1U 6HB
United Kingdom   Tel: 01 583 9876

Potential suppliers are reminded that most United Kingdom importing companies will provide full details of health regulations and other requirements relating to specific fish products (*see Procedures for developing country exporters*, p.62)

APPENDIX 6: INFORMATION SOURCES FOR UNITED KINGDOM TARIFFS AND REGULATIONS APPLYING TO PRODUCTS OF JOINT VENTURES BY AFRICAN, CARIBBEAN AND PACIFIC (ACP) COUNTRIES

Information sources: United Kingdom tariffs

United Kingdom tariff data is published in the form of the *Tariff and Overseas Trade Classification*, under the authority of the Commissioners of Her Majesty's Customs and Excise. Copies of this publication may be obtained from:

HMSO Books
4a High Holborn
London WC1U 6HB
United Kingdom   Tel: 01 583 9876

or from regional offices or United Kingdom bookshops.

A summary of United Kingdom tariffs and other trade regulations is included in the *Register of Import Regulations for Fish and Fishery Products*, T Wessel Daae (ed). FAO Rome 1981. Copies of this publication may be obtained from:

Sales and Distribution Section
FAO
Via delle terme di carracalla
00100 Rome
Italy   Tel: 396 5797

Regulations relating to products of joint ventures undertaken by ACP countries

The following requirements must be met in order to obtain duty exemptions offered to ACP countries if products are derived through joint ventures:

1. In order that fresh or frozen fish from an ACP country may gain access to the EC at the preferential rates of duty laid out in the ACP/EC Convention of Lomé, it has to have been wholly obtained in one or more ACP country (products obtained by hunting or fishing conducted *therein*). Products of inland water systems and aquaculture projects are thus assured of preferential treatment. Alternatively, products of *sea* fishing and other products taken from the sea and despatched to the EEC by ACP countries will only qualify if they have been caught by *'their vessels.'*

The term 'their vessels' is applied only to those:

1 —Which are registered or recorded in a member state or an ACP state.

2 —Which sail under the flag of a member state or an ACP state.

3 —Which are owned to an extent of at least 50% by nationals of the states party to the Convention or by a company with its head office in one of these states, of which the manager or managers, chairman of the board of directors or of the supervisory board, and the majority of the members of such board, are nationals of states party to the Convention and of which, in addition in the case of partnerships or limited companies, at last half the capital belongs to states party to the Convention or to public bodies or nationals of such states.

4 —Of which at least 50% of the crew, captain and officers included are nationals of states party to the Convention.

2 In general, under Lomé, products that do not originate (that is, have not been wholly obtained) in ACP countries can and do qualify for 'originating status', if they are processed in such a way in an ACP country so as to change the Brussels Nomenclature Tariff heading of those products. This does *not*, however, apply

to any fish, crustaceans and molluscs. Thus no form of processing, including drying, salting, smoking or canning, will confer originating status on any marine product that has not been caught by a vessel which does not comply with the requirements listed in 1 above.

3 All fish crustaceans and molluscs landed by a vessel which does comply with the requirements listed in 1, whether or not further processed in an ACP country, gain *free access* to the EC.

APPENDIX 7: UNITED KINGDOM IMPORTERS AND AGENTS OF EDIBLE FISH PRODUCTS

The following lists give the names and addresses of companies which are known by the Tropical Development and Research Institute to be trading in edible fish products, but the list should not be regarded as exhaustive. Inclusion in the list does not imply that TDRI has any knowledge of the financial standing of the firms.

Two lists are provided, one for canned products and one for all other items, since firms dealing with two groups of products are generally quite distinct, (*see Trade structure and marketing channels for canned fish and crustaceans* p.52, and *Trade structures and marketing channels for other edible fish products* p.53.

Canned fish and crustaceans

Armour Foods (UK) Ltd
193 St John St
London EC1P 1EN 01 253 8400

Jose Bataller & Co Ltd
Units 11 and 13
109 Maybank Road
London E18 1E3 01 505 4623

S. & W. Berisford Ltd
Manor House
Holmes Chapel
Cheshire CW4 8AD 0477 33511

R. N. Bollans & Co Ltd
26 Exchange St E
Liverpool L2 3PH 051 236 6442

A. Donatantonio & Sons Ltd
105 Mayes Road
London N22 6UP 01 888 7496

Enco Products (London) Ltd
71/75 Fortess Road
London NW5 1AU 01 485 2217

Frost (Nathan) Ltd
Brune Street
London E1 7NL 01 247 6160

Gill & Duffus (Liverpool) Ltd
210 Borough High Street
London SE1 1HW 01 407 7050

Glenryk (UK) Ltd
8 Friday Street (PO Box 22)
Henley on Thames
Oxfordshire RG9 1AH 04912 78123
Telex 849477

Libby McNeill & Libby Ltd
26 Park St
Croydon CR9 1TT 01 573 1010
Telex 23117

A. M. Macgrotty & Co Ltd
1 Seething Lane
London EC3 01 481 2822

John Martin Foods Ltd
48 Southwark St
London SE1 1UN 01 403 1151
Telex 8813121 JM FOODS

John West Foods Ltd
54 Stanley Street
(PO Box 122)
Liverpool L69 1AG 051 236 8771
Telex 627188 JON WSTG

Gilbert J. MaCaul (Overseas) & Co Ltd
14 Nicholas Lane
London EC4 01 283 1255

F. J. Parsons & Co (Manchester) Ltd
Corn Exchange
Hanging Ditch
Manchester M4 3BJ 061 832 6421

Peasbody Foods Ltd
Astronaut House
Hounslow Road
Middlesex TW14 9AN 01 890 1433
Telex 934438

Pollshon Trading Co. Ltd
96 Wardour St
London W1V 4BB 01 437 0543

Princes Buitoni Foods
4th Floor, Royal Liver Buildings
Liverpool 3 051 236 9282
Telex 628049

J. A. Sharwood & Co Ltd
10 Victoria Road
Willesden
London NW10 6NU 01 965 6565

Thurloe Foods Ltd
29 Thurloe Street
London SW7 2LQ 01 589 4813
Telex 919337

Fresh/frozen/processed fish and crustaceans

Most firms listed below handle both fresh/frozen fish products and fresh/processed crustaceans and molluscs. The number also handling dried/smoked fish products is more limited.

Associated Fisheries Ltd
16 Queen Annes Gate
London SW1H 9AQ 01 222 0404
Telex 262224

G. S. Ballard & Son
East George St
North Shields
Tyne and Wear 0632 570009

Baxter & Sons
Office 74 Billingsgate
87 West India Dock Road
London E14 01 515 4728

Birds Eye Foods Ltd
Station Ave
Walton on Thames
Surrey 01 982 8888

Birmingham Salmon Co
Unit 84, Horticultural Market
Pershore Street
Birmingham 021 622 2018
Telex 335410

R. Bloomfield (Billingsgate) Ltd
213 Old Ford Road
London E3 01 981 0946

Brekkes Ltd
Fish Quay
North Shields
Tyne and Wear 0632 574116

A. W. Butler (Wholesale) Ltd
53 Butts Green Road
Hornchurch
Essex 040 24 43316

Cydilda Ltd
61 High Street
Wimbledon
London SW19 01 986 0495

Enco Products (London) Ltd
71/75 Fortess Road
London NW5 1AU 01 485 2217

Evans, Gray and Hood Ltd
Berkshire House
168/173 High Holborn
London WC1V 7AF 01 379 6422
Telex 263061

Findus Ltd
St George's House
Park Lane
Croydon
Surrey CR9 1NR 01 686 3031

Flying Goose Ltd
Barrow House
Bishopstrow
Warminster
Wiltshire BA12 9HU 0985 214565
Telex 449357

Hosier Lane Trading Co.
Druid Street
London SE1 01 407 0102

Landaur International Seafoods Ltd
Pepys House
14 Coopers Row
London EC3N 2BQ 01 488 3511
Telex 885824

Lynn & Gibson (Holdings) Ltd
Shellfish House
27/33 Silverton Way
London E16 1DJ 01 476 9013
Telex 885511

Macleod Ross & Harmony Ltd
79 Long Lane
London EC1 01 606 6407

Miah & Sons
156 Hemingford Road
London N1 01 607 7844
Telex 894088

C. J. Newnes & Co.
Office 11, Billingsgate
87 West India Dock Road
London E14 01 515 0798

Ross Foods Ltd
Ross House
Grimsby
South Humberside DN31 3SW
0472 59111

San Raphael Seafoods Int.
PO Box 22
8 Friday St
Henley on Thames
Oxfordshire RG9 1AH Telex 849477
Frozen G.

Seafare Importing Co.
71 Billingsgate
87 West India Dock Road
London E14 01 987 4545
Telex 888784

Sea Products International
Harborne Ct
67–69 Harborne Road
Edgbaston
Birmingham B15 1BU 021 454 9999
Telex 336639

Sidwell & Co. Ltd
Rosemount Towers
Stafford Road
Wallington
Surrey 01 699 3211

W Wing Yip Ltd
96–98 Coventry St
Birmingham B5 5NY 021 643 8987
Telex 336588
WIN YIP

Youngs (Seafoods) Ltd
Ixworth House
Ixworth Place
London SW3 3PO 01 730 9945
Telex 263735

Contacts with importers for all edible fish products may also be initiated via trade fairs. Two of the most important fairs, held in Europe and associated contact addresses are:

SIAL (biannual), Paris
French Trade Exhibitions
French Chamber of Commerce House
54 Conduit St
London,
United Kingdom Tel 01 439 3964
Telex 269132

ANUGA Food Fair (biannual), Cologne
Kölnmesse
Postfach 210760
D-5000 Cologne 21
Federal Republic of Germany
Tel 0221 8212231

Within the United Kingdom the major food fair is:

International Food and Drink Exhibition
Interbuild Exhibitions Ltd
11 Manchester Square
London W1M 5AB Tel 01 486 1951
Telex 24591 MONTEX G

Trade associations may also provide information to potential importers. United Kingdom associations include the following:

British Association of Canned Food Importers and Distributors (BACFID)
15/16 Dufferin St
London EC1Y 8PD Tel 01 253 9421

National Coldstorage Federation
Tavistock House North
Tavistock Square
London WC1 Tel 01 387 4374

National Federation of Wholesale Grocers and Provision Merchants Trade Association
18 Fleet Street
London EC 4AY Tel 01 353 8894

APPENDIX 8: SOURCES OF INFORMATION ON PRICING

Quotations on pricing for a wide range of items including most of those covered in this study can be obtained in the following two periodicals:

Infofish: Trade News (Bimonthly)
PO Box 10899
Kuala Lumpur 01—02
Malaysia Telex INFISH MA 31560
Tel 914614

Infopesca: Market News and Price Report (Bimonthly)
Apartado 6—4894
Estafeta El Dorado
Panama
Republic of Panama
Telex 2582 INFPESCA
Tel 693477

Price quotations primarily for wetfish and some frozen items in United Kingdom port and regional markets appear regularly in the following two newspapers:

Fish Trader
Queensway House
2 Queensway
Redhill
Surrey RH1 1QS
United Kingdom Tel 0737 68811

Fishing News
AGB Heighway Ltd
Canada House
Kildare Close
Middlesex HA4 9XB
United Kingdom Tel 01 866 5155

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