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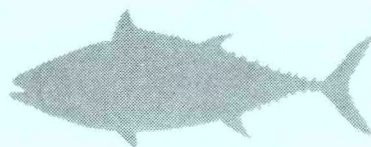
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THE MARKET FOR SEAFOOD IN THE UNITED KINGDOM

by

Charlotte L. Miller



JUNE 1986

ADMINISTRATIVE REPORT SWR-86-8





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ADMINISTRATIVE REPORT SWR-86-8

JUNE 1986

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Summary

The United Kingdom is the third leading importer of seafood in western Europe. Approximately one-third of all fresh and frozen seafood and almost all canned fish consumed in the U.K. is imported. Since British tastes favor traditional species, cod is the predominant species imported.

Seafood imports have been growing steadily. This is due to an increase in consumption in recent years and to a steady decline in overall domestic fisheries production. These trends should continue and the U.K. will be importing even more seafood in the future.

Sales of frozen seafood have been growing steadily in recent years while those of fresh seafood have been declining. The increase in frozen food consumption is due largely to the increasing popularity of convenience food such as ready-prepared meals, fish in sauces, and battered fish products.

U.S. exports of seafood products have been declining since 1983. This has been due largely to the strength of the dollar against the British pound. The recent decline of the dollar should result in increased opportunity for exporting seafood to the United Kingdom.

Canned salmon has been, by far, the most important U.S. seafood export, but market share is threatened by increased competition. Alaska pollock and Pacific cod, as well as other groundfish, offer the best prospects for increasing U.S. exports. With a trend toward convenience food, opportunities also may exist for prepared main dishes as well as other convenience food products which utilize low-valued species of fish and shellfish.

The success of U.S. exporters will depend on their ability to overcome the disadvantages of relatively high tariff rates, a value added tax, and the reference price system, which provides for minimum import prices on certain species.

I. Demand

In 1984, annual per capita seafood consumption in the United Kingdom was 8.0 kg (17.6 lbs.) (Agra Europe, 1985), compared to 6.2 kg (13.6 lbs.) for the United States (NMFS, 1985). Based upon this figure and the 1984 population of the U.K., apparent consumption for 1984 was 449,000 metric tons (mt). Seafood consumption has been on the increase as a result of private industry and government promotions and the growing perception of seafood as a health food (FAO, 1985a).

The British market for seafood can best be described as conservative. Preferences clearly favor whitefish which accounts for 85 percent of total seafood consumption. Cod is the staple species, but Britons also favor haddock, plaice, saithe, and hake. A recent survey showed that cod is served in 72 percent of households, haddock in 60 percent, and plaice in 49 percent. Other species of fish account for 9 percent of total seafood consumption. The more popular species are salmon, pilchards, tuna, sardines, and mackerel (BBH Corporation, 1985).

The average British household consumes slightly over 9.5 kg (21 lbs.) of fish annually. By product form, frozen fish makes up 46 percent of household fish purchases, fresh fish 38 percent, and canned fish 12 percent. Eighty percent of institutional purchases are in the frozen form (BBH Corporation, 1985).

Frozen fish consumption in the United Kingdom rose by 39 percent from 1978 to 1984 largely as a result of the increasing popularity of convenience food. Thus, the fastest growing sector is the processed frozen fish market (MAP, 1985).

Table 1 shows product segmentation of the processed frozen fish market by value of sales in 1984. Prepared fish dishes and fish in sauces, which appeal to the upwardly mobile consumer, are showing particularly strong growth (MAP, 1985). In 1984, these products accounted for 15.8 percent of this market. Sales of specialty fish, such as salmon and trout, increased by as much as 120 percent by value from 1981 to 1985 (FAO, 1985b). In 1984, this product category represented 10.3 percent of the frozen processed fish market.

Table 1. Product segmentation of the processed frozen fish market, 1984

	<u>% Based on Value</u>
Frozen Fillets	28.8
Fish Fingers	21.3
Battered Fish Products	14.3
Specialty Fish	10.3
Fish in Sauce	9.5
Prepared Dishes	6.3
Natural/Breaded Steaks	5.8
Fish Cakes	3.8

Source: MAP, 1985

Fish fingers and fishcakes represented approximately 25 percent of the market, but have been declining in popularity. These products typically have been purchased by young housewives with children. Reports indicate that they are shifting demand to battered fish products which accounted for 14.3 percent of the market in 1984. Fish fillets, the single largest category, made up almost 29 percent of the processed frozen fish market. Trends in sales were not reported which may indicate that they are relatively stable.

Frozen whole fish is consumed predominantly in the southeast United Kingdom. It is a traditional product form and is purchased more often by consumers in the older (+45 years) age groups (MAP, 1985).

Fresh fish consumption declined by 5.5 percent in 1984. This downward trend is expected to continue as prices rise in response to declining production by the British fleet (MAP, 1985).

Cod, haddock, and plaice are the most important species in the fresh fish market (Table 2). A large number of other species are consumed but in smaller quantities. Fillets are the most popular product form, accounting for 73 percent of the value and 69 percent of the volume of fresh fish sales (Table 3).

Table 2. Consumption of fresh fish by species, 1984

	<u>% Based on Value</u>	<u>% Based on Volume</u>
Cod	23	22
Haddock	21	20
Plaice	11	10
Saithe	4	7
Herring	2	4
Mackerel	1	2
Others	38	35

Source: MAP, 1985

The British are avid consumers of canned fish. As stated earlier, 12 percent of fish consumed at home is canned. Still, only 3 percent of food service or institutional fish sales are canned products (BBH Corporation, 1985). In 1985, consumption of canned fish rose 3 percent over 1984. On the basis of volume, tuna accounted for 22 percent of the market share, pilchard 22 percent, sockeye salmon 19 percent, trout 13 percent and sardines 12 percent. The remaining 6 percent was made up of other species (Suisan Tsushin, 1986).

Table 3. Sales of fresh fish by type of product, 1984

	<u>% Based on Value</u>	<u>% Based on Volume</u>
Fillets	73	69
Whole	15	20
Steaks/Portions	9	8
Others	3	3

Source: MAP, 1985

Statistics on consumption of cured fish are not available. It is reported, however, that preferences are for European species and the bulk of the market is supplied from domestic sources (Infofish Trade News, 1986).

Shellfish accounts for only 6 percent of total seafood consumption. As with specialty fish discussed earlier, demand for specialty shellfish, such as prawns, crab, and lobster, also is increasing (MAP, 1985).

Until very recently, the U.K. fishing industry had no sustained promotional program. As a result, seafoods have had stiff competition from lower priced poultry. Furthermore, the younger generations know little about seafood with possible exceptions of fish sticks and battered portions. In an effort to correct these conditions, the Sea Fish Industry Authority and the British government are sponsoring a program to improve seafood markets in the United Kingdom. The program has two major goals: 1) to increase consumption of seafood by educating consumers about its health benefits and the different products available, and 2) to increase the value of seafood through improved quality and development of new products and new markets, especially for underutilized species (Anon., 1985a; Anon., 1985b). Although this program is targeted on species produced in the European Economic Community, it could have a positive effect on the import market as well by increasing overall demand for seafood. In addition, if the program is successful in getting the traditionally conservative British consumer to accept new species, then the market for new imported seafood products could be developed further.

II. Supply

A. Domestic

According to statistics prepared by the Organization for Economic Cooperation and Development (OECD, 1982, 1985), fisheries production in the U.K. is declining. As the U.K. is a member of the European Economic Community (EEC), catch quotas for the British fishing industry are set by the EEC Central Authority. These restrictions, and catch limits placed on the British fleet in waters controlled by Iceland, Norway, the U.S.S.R., the Faroe Islands, and Canada, have had significant impacts on the U.K. fishing industry.

The sector most affected by the new policies was the distant-water groundfish fleet which experienced declines in production due to restricted access to traditional fishing areas. Production of cod, traditionally caught off Iceland and Canada, was reduced by over 50 percent from 212,545 mt in 1976 to 103,475 mt in 1980. Haddock production, primarily a North Sea fishery, declined by about 37 percent during the 1976-80 period. There were slight increases in production of whiting and a few minor species, so that overall groundfish production decreased 33 percent from 1976 to 1980 (U.S. Department of Commerce, 1983). Since this time, landings of haddock and saithe have increased, while those of other groundfish species have remained stable or declined. Production of cod, which was stable at roughly 115,000 mt from 1981 through 1983, fell to approximately 91,000 mt in 1984 (FAO, 1985c).

In contrast to groundfish, production of pelagic species increased significantly from 1976 to 1979 despite a complete ban on herring fishing in the North Sea. Prior to 1977, large quantities were caught off southwest England by Soviet bloc nations, but when the U.K. established a 200-mile fishery conservation zone, these foreign fleets were banned from further fishing. Domestic fleets then began fishing more heavily for mackerel as an alternative to depressed stocks of herring and cod. As a result, mackerel production in 1979 was 3.1 times its 1976 level (U.S. Department of Commerce, 1983). Landings of mackerel peaked in 1980 and declined over the period 1981-1983, but rose again in 1984 (FAO, 1985d). Despite this increase in production, there is now some worry about conditions of mackerel stocks and a ban on the North Sea fishery is being considered (Anon., 1984).

Salmon culture in the United Kingdom is developing at a fast rate. Production rose from 520 mt in 1979 to 4,000 mt in 1984. There are at least 126 sites, all located in Scotland, which are operated by 67 companies. More entries in the industry are expected (Anon., 1985c).

According to statistics prepared by the Food and Agricultural Organization of the United Nations (FAO), shellfish production has remained stable. Principal species harvested are crabs, whelks, periwinkles, oysters, scallops, and cockles.

The future of the British fishing industry depends upon its success in negotiating quotas with the EEC Central Authority, the enforcement of conservation measures to maintain stocks, and its success in gaining access to waters of countries outside the EEC. Recently, the U.K. has been successful in negotiating larger EEC quotas. With the exception of mackerel, all 1985 quotas were slightly higher than 1983 and 1984 levels (Infofish Trade News, 1985).

B. Imports

1. General Trends

Seafood imports declined from 1980 through 1982, but then rose in 1983 and 1984 (Table 4). In 1983, 348 mt of seafood were imported, a 6.7 percent increase over 1982. In 1984, imports rose by 4.0 percent to 362 mt. At this level, the United Kingdom ranked third in volume of seafood imports among western European nations, behind West Germany and France (Infofish Marketing Digest, 1985).

Table 4. United Kingdom imports by major fishery commodity, 1980-84.
(Quantity (Q) = 1,000 mt, Value (V) = Million US\$)

	1980		1981		1982		1983		1984	
	Q	V	Q	V	Q	V	Q	V	Q	V
Fish:	305	642	307	685	290	538	308	564	319	536
Fresh, chilled	120	133	97	116	93	93	99	90	102	91
Frozen	38	70	40	75	40	65	44	62	46	59
Frozen fillets	80	199	81	185	89	191	79	155	79	143
Cured	3	7	3	8	3	5	3	5	3	5
Prepared/ Preserved	64	233	86	301	65	184	83	252	89	238
.....										
Shellfish:	34	158	30	156	36	170	40	199	43	182
Fresh, Frozen, Cured	19	67	16	71	19	79	21	89	24	91
Prepared/ Preserved	15	91	14	85	17	91	19	110	19	91
.....										
Total Seafood Imports	339	800	337	841	326	708	348	763	362	718
.....										
.....										

Sources: Fish Products, 1980-82 - OECD, 1982, 1984
Shellfish, 1980-82 - FAO, 1984
1983-85 data - Sea Fish Industry Authority

Fish imports accounted for well over 80 percent of seafood imports from 1980 to 1984. Roughly a third of that was imported fresh. Frozen fillets accounted for about 25 percent of fish imports.

Prepared and preserved fish was the other major category and consists primarily of canned fish. Approximately 95 percent of the canned fish consumed in the U.K. is imported. Major suppliers are Japan, the U.S. , Canada, Denmark, and Fiji (Suisan Tsushin, 1986). The sharp decline in imports which occurred in 1982 was a result of a botulism incident. By 1983, however, the market had recovered (FAO, 1985e). Production by the British canning industry has been growing rapidly in recent years; showing a 24 percent growth in 1985 (Suisan Tsushin, 1986). If this trend continues, the U.K. could become less dependent upon imports for its supply of canned fish.

By volume, shellfish represented only 9 to 12 percent of total seafood imports during 1980-84. However, it accounted for 19 to 26 percent of the total value of seafood imports over that same time period.

Table 5 lists the more important species imported under each category. The table lists all species which showed imports over 1,000 mt in either 1983 or 1984.

Clearly, cod has been the predominant species. In 1984, it accounted for 37.4 percent of fresh imports, 40.1 percent of frozen whole fish imports, and 76.1 percent of frozen fillet imports. Other important species of groundfish are plaice, haddock, and saithe.

Mackerel and herring were the major pelagic species. Both have been imported primarily as fresh fish.

In terms of value, salmon was the leading species under the frozen whole fish category. In 1984, it represented 36.3 percent of all imports under this category. Salmon accounted for 41.7 percent, by value, of prepared/preserved fish imported into the U.K. in 1984. However, in terms of volume, tuna led salmon in 1984. Regarding the prepared/preserved fish market, it should be noted that the U.S.S.R. rapidly is becoming a more important supplier of canned salmon (FAO, 1985F).

Two species of special interest are dogfish and Alaska pollock. Dogfish imports, of which the U.S. is the second most important supplier, appear to be increasing. Sea Fish Industry Authority (SFIA) statistics show that in the first nine months of 1985, over 3,000 mt were imported which exceeds total imports for 1984. Alaska pollock imports are also on the rise. In the first nine months of 1985, almost 2,000 mt had been imported, a sharp increase over 1984 levels.

2. U.S. Exports of Seafood to the U.K.

The U.S. is not a major supplier of seafood to the United Kingdom. Exceptions to this are canned and fresh and frozen salmon. In 1985, canned salmon exports, mostly pink and sockeye, totaled 8,785 mt, and represented 70.0 percent of all U.S. exports to the United Kingdom (Table 6). Exports of fresh and frozen salmon, mainly chum, totaled 1,899 mt or 15.1 percent of all exports. The next largest category was frozen squid with only 341 mt.

Following a 44.1 percent increase from 1982-83, the volume of U.S. seafood exports to the U.K. has been declining. The 1985 level of exports was 17.1 percent lower than that recorded in 1983. Most of the changes can be attributed to canned and fresh and frozen salmon. The large increase in canned salmon exports which occurred in 1983 was due to recovery of the market from the botulism scare mentioned earlier.

Table 5. United Kingdom imports of seafood products by major species, 1983-84.
(Quantity (Q) = MT, Value (V) = Thousand \$)

Fish	1983		1984	
	Q	V	Q	V
<u>Fresh & Chilled</u>	98,592	89,974	102,094	90,637
Cod	27,026	25,019	38,164	30,686
Mackerel	26,432	5,579	18,344	3,124
Plaice	17,062	18,418	14,701	13,836
Herring	7,418	2,828	6,512	2,237
Haddock	7,124	6,054	7,832	6,234
Dogfish	2,050	2,388	2,464	1,575
Salmon	1,373	7,521	1,467	8,675
Whiting	468	391	1,121	486
Other	9,639	21,776	11,489	23,784
<u>Frozen, Whole</u>	43,960	62,351	46,278	58,995
Cod	15,124	14,325	18,579	14,060
Salmon	5,841	21,914	5,104	21,396
Herring	4,486	2,981	3,243	1,846
Haddock	1,660	1,467	1,447	1,091
Mackerel	1,532	646	2,161	880
Plaice	1,275	1,107	1,033	823
Dogfish	1,248	1,514	915	1,138
Alaska Pollock	131	16	17	17
Other	12,663	18,381	13,779	17,744
<u>Frozen Fillets</u>	79,182	154,752	78,850	142,741
Cod	53,615	114,531	59,984	114,820
Haddock	7,965	17,040	4,620	9,194
Saithe	5,166	5,737	5,616	5,253
Plaice	3,548	5,382	3,188	7,892
Herring	3,480	3,048	2,830	1,927
Other	5,408	9,014	2,612	3,655
<u>Cured</u>	2,551	4,840	2,751	5,421
Herring	422	319	256	224
Salmon	29	291	68	390
Other	2,100	4,230	2,427	4,807
<u>Prepared, Preserved</u>	82,860	252,209	88,584	238,465
Salmon	25,731	126,147	21,468	99,493
Tuna	16,912	48,031	23,050	60,455
Pilchards	10,891	10,431	12,682	12,550
Sardines	9,841	13,853	10,980	13,907
Fillets/Batter or Breadcrumbs	2,356	6,828	4,218	10,102
Mackerel	2,049	3,369	1,923	3,396
Herring	1,023	2,341	1,129	2,320
Other	17,129	46,919	16,186	41,958
<u>Shellfish</u>				
<u>Fresh, Frozen, Cured</u>	20,535	88,788	24,408	91,277
Prawns (Pandalidae)	5,752	24,622	5,061	17,849
Unspecified Prawns & Shrimp	4,349	29,308	8,194	43,234
Mussels	1,498	1,775	1,781	1,679
Squid	579	922	1,010	1,406
Lobster	176	1,625	289	2,477
Oyster	174	425	145	337
Other	8,007	30,111	7,928	24,295
<u>Prepared, Preserved</u>	18,649	109,510	18,564	90,609
Canned Shrimp/Prawns	1,320	5,341	1,011	3,641
Crab	1,299	8,447	1,280	8,756
Other Crustaceans	14,804	93,142	14,524	74,614
Mollusks	1,226	2,580	1,749	3,598

Exchange rates used in conversions: 1983: £=151.7 U.S. Cents, 1984: £=133.6 U.S. Cents
Source: Sea Fish Industry Authority

Table 6. U.S. exports of seafood products to the United Kingdom, 1982-85.
(Quantity (Q) = MT, Value (V) = 1000 \$)

	1982		1983		1984		1985	
	Q	V	Q	V	Q	V	Q	V
Eels, Live	0	0	0	0	1	2	3	10
Finfish, Whole or Eviscerated Fresh, Chilled, Frozen								
Eels	0	0	0	0	11	6	0	0
Herring	103	141	65	75	56	75	32	40
Mullet	30	134	105	65	49	60	16	21
Sablefish	0	0	0	0	0	0	5	3
Pollock	1	1	0	0	8	40	305	474
Other Fish	497	889	276	560	605	1,324	476	1,069
Salmon	2,905	9,469	3,195	8,548	2,473	7,888	1,899	6,241
Chinook	36	158	12	50	9	83	11	41
Chum	1,069	3,692	1,500	4,283	1,522	4,799	1,156	3,730
Pink	286	779	243	564	219	540	180	430
Sockeye	141	688	109	573	86	488	11	32
Unspecified	1,373	4,152	1,331	3,078	637	1,978	541	2,008
Filletts, Steaks, Portions								
Salmon	36	147	28	169	31	118	14	44
Other	801	1,141	603	1,107	349	739	531	1,071
Fish Sticks & Portions, Breaded or Battered	324	542	13	38	1	2	1	1
Canned Fish								
Salmon	5,080	20,798	10,057	43,771	10,659	43,094	8,785	36,600
Chum	309	727	491	1,246	481	1,215	235	628
Pink	2,370	7,610	3,402	12,143	4,199	13,669	3,127	9,835
Sockeye	2,326	12,200	5,523	27,888	5,682	27,054	5,109	24,671
Unspecified	75	261	641	2,494	297	1,156	314	1,466
Sardines in Tomato Sauce	4	4	215	196	111	61	0	0
Other Fish	19	64	74	115	22	26	16	92
Finfish in Air-tight Containers	43	48	68	141	1	3	14	24
Finfish, Dried, Salted, Smoked	1	1	1	2	0	0	3	21
Fish Roe								
Salmon	1	3	1	3	0	0	0	0
Other	2	107	5	212	10	281	6	132
Fish Balls, Cakes, Puddings	1	2	76	138	5	17	2	7
Shellfish, Fresh or Frozen								
Shrimp frozen	70	353	73	352	51	342	32	246
King crab, frozen	26	206	7	130	5	89	12	123
Snow crab, frozen	14	79	10	16	1	2	0	0
Squid, frozen	323	479	113	190	124	251	341	508
Other shellfish, fresh or frozen	52	289	67	380	49	246	46	206
Shellfish, Fresh or Frozen Packaged								
Shrimp, fresh packaged	0	0	0	0	1	1	0	0
Other	37	74	0	0	3	36	0	0

Table 6. (Cont'd)

	1982		1983		1984		1985	
	Q	V	Q	V	Q	V	Q	V
Canned Shellfish								
Shrimp	134	722	87	520	1	8	1	2
Squid	0	0	0	0	31	20	0	0
Other	6	15	3	13	0	0	0	0
Shellfish, cured	0	0	1	5	2	9	10	18
Total Seafood Products	10,510	35,708	15,143	56,746	14,659	54,738	12,547	47,149

Source: U.S. Department of Commerce, Bureau of the Census

Several trends of particular interest to west coast exporters should be pointed out. Sablefish apparently was exported for the first time in 1985. Also, pollock exports rose from 8 mt in 1984 to 304 mt in 1985. In the first three months of 1986, 94 mt of pollock has been exported compared to 7 mt during the same period in 1985; thus U.S. exports of this species may be beginning a significant increase. Finally, exports of breaded or battered fish fell dramatically in the period 1983 to 1985. This could be attributed to the declining consumption of fish sticks in the United Kingdom.

III. Distribution

United Kingdom fishermen are organized into producer organizations and are required to sell their fish through the organizations or under the rules set by them. Producer organizations have the authority to set prices, grading and quality standards. Approximately 70 to 80 percent of U.K. production is sold through producer organizations (U.S. Department of Commerce, 1983).

Fish is landed in twelve principal ports (Figure 1). Upon being landed, fresh fish including direct foreign landings, is auctioned through a port merchant to inland wholesale markets, individual wholesalers, exporters, processors and meal producers (Figure 2). Frozen fish is purchased directly by processors or it is sold directly to large fish friers (fish & chips shops), frozen food wholesalers and retailers and to inland merchants. Packaged frozen products are distributed to supermarkets and home freezer centers directly from processors or through frozen food wholesalers (BBH Corporation, 1985).

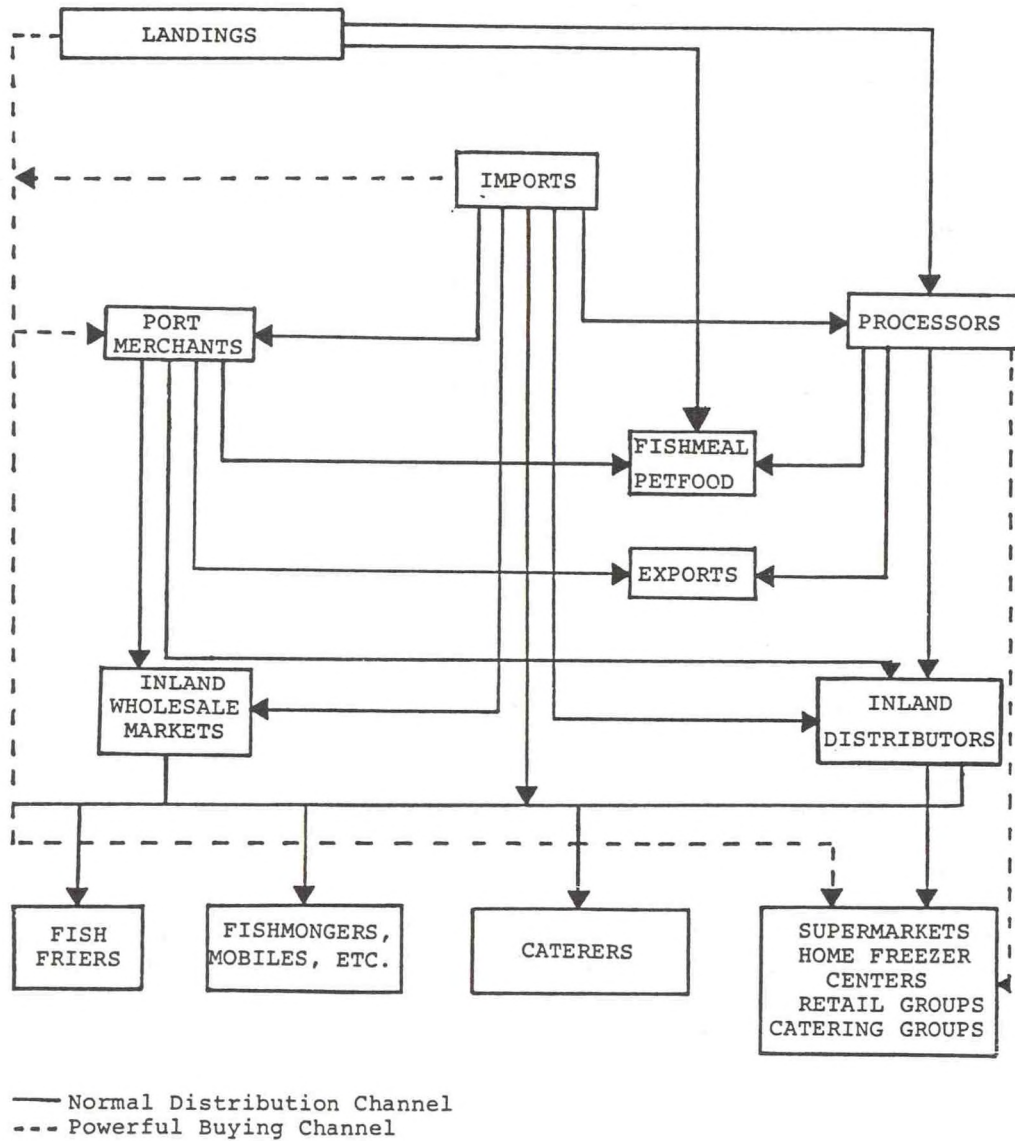
Traditionally, the three major retail outlets for seafood have been fish friers, fishmongers, and institutional consumers and catering establishments. The trend toward frozen seafood, however, has resulted in declining importance of the fishmonger. Supermarkets now account for 40 percent of frozen seafood sales while home freezer centers account for 25 percent (BBH Corporation, 1985). Most smaller grocery stores also carry a variety of frozen seafood items. Table 7 shows the types and numbers of retail outlets handling seafood in the U.K. as of 1984.

Imports, many of which are in frozen form, follow basically the same distribution channels as domestic fish. Traditionally, imports have been landed at Hull. However, Great Yarmouth, which offers frozen container services, is handling greater amounts of seafood imports. Felixstowe and Ipswich are also major container ports for foreign goods (Librarian, British Consulate, Los Angeles, CA, pers. comm.).

UNITED KINGDOM



Figure 1. Principal fishery ports and inland wholesale markets in the United Kingdom.



Source: BBH Corporation, 1985

Figure 2. Seafood distribution channels in the United Kingdom.

Table 7. Relative importance of seafood retail outlets in the United Kingdom as of 1984.

<u>Type of Outlet</u>	<u>Number</u>	<u>% of Total</u>
Independent Grocers	24,000	36
Voluntary Groups	15,700	24
Market Stalls	8,000	12
Multiple Grocers	7,600	11
Co-ops	4,800	7
Fishmongers	3,000	5
Freezer Centers	1,000	2
Discount Multiples	900	1
Variety Stores	800	1
Department Stores	300	1
Total	66,100	100

Source: MAP, 1985

Canned fish reaches retail outlets through wholesalers and local distributors. The British market is a "buyers label market" with importing companies distributing under their own labels which are strongly promoted. Traditionally, packers labels have not done well so it is advisable for potential exporters to place their products with an importer who has a well known brand (Van der Eerden, 1981).

IV. Trade Policy and Regulations

A. Trade Barriers

Fishery trade with the United Kingdom, as with all other EEC member states, is regulated by the Common Fishery Policy. One of the primary purposes of this policy is to protect the fishing industries of member nations from undue competition and market destabilizing forces and secure reasonable living standards for fishermen.

Protection from lower priced imports is provided through the reference price system. Reference prices function as minimum import prices and are calculated percentages of guide prices. Guide prices are determined for most species landed in the EEC by averaging prices received over the previous three years. If the import price of an item falls below its reference price, then intervention measures can be taken. These can include suspension of import of the product, restrictions on the basis of quality, presentation or end use, or a compensatory tax can be levied equal to the difference between the reference and import prices (U.S. Department of Commerce, 1983).

Guide and reference prices for 1986 are listed in Appendix IV. The prices for the following year are usually decided upon sometime in December by the European Economic Community Council. Copies of the prices can be obtained from the following office after January 1 of each year:

EEC Guide and Reference Prices
National Marine Fisheries Service
P.O. Box 1109
Gloucester, MA 01931-1109

The tariffs on most products available for export from the U.S. to the United Kingdom are substantial because of the United States' non-favored status. However, some exceptions do exist such as fresh and frozen salmon (2.0%) and freshwater eels (3.5%). In the area of fishery products, the U.S. faces competition from EEC member nations, which export to the U.K. on a duty-free basis, and from developing nations which are either exempt from duties or are subject to much lower tariffs. In addition, certain other countries, such as Norway, receive favorable tariff treatment. Appendix V contains a listing of the most current (effective December 9, 1985) duty rates for selected seafood items. Tariff rates change frequently, however, and should be confirmed prior to completing specific price negotiations. Exporters may obtain information about current duty rates from their importer or agent or by contacting the following agency:

HM Customs and Excise, ICA
Kent House, Upper Ground
London SE1, England

In addition to any import duty, a levy may be payable on imports of certain fishery products under the Sea Fish Industry Authority (Levy) Regulations 1982 Confirmatory Order. Details, including current rates of levy and exemptions, may be obtained from the following office:

Sea Fish Industry Authority
Sea Fisheries House
10 Young Street
Edinburgh EH2 4JQ, Scotland

In addition to tariffs, all products imported into the United Kingdom are subject to a value-added tax (V.A.T.). This tax is essentially a sales tax which is levied on the duty-paid value of goods. Because duties paid on U.S. goods are higher than goods from many other countries, the V.A.T. results in further loss of price competitiveness.

Beginning in 1981, the rising strength of the dollar against the British pound has had an adverse affect on the export of U.S. seafood products to the U.K. In 1981, the value of the British pound measured in U.S. cents was 202.42. By February 1985, the value had declined to 109.31. Since then, however, the U.S. dollar has been losing strength and, as of June 30, 1986, the value of the British pound stood at 152.88 U.S. cents. If this trend continues, U.S. products will be able to compete more favorably in the British market.

B. Trade Regulations

The government of the United Kingdom is in the process of updating regulations governing the sale of food products, including fishery products. The revised regulations form the Food Act of 1984. In addition to the Act, which provides the basic legislation, subordinate legislation under the Act covers the composition of food including additives and contaminants, labeling, treatments, processes, and hygienic quality.

The current food labeling regulations (Food Labeling Regulations 1980 and Part IV of the Labeling of Food Regulations 1970) will continue to be in force until July 1, 1986 when the new Food Labeling Regulations 1984 will come into effect. The new regulations update the provisions on claims and misleading descriptions, and revise controls on additives and vitamins.

Under current regulations, all prepackaged food intended for retail sale must be labeled with its common or usual name, if one exists, or with an appropriate designation apprising the buyer of the actual nature of the food. Non-prepackaged foods and foods containing two or more ingredients also must display a ticket or label indicating to the purchaser what the food contains. Specific names have been established for use on labels of prepackaged or non-prepackaged fish. Labels of prepackaged foods must also show the name of a responsible person, such as the packer or labeler, or the name of the person on whose behalf the food was labeled and packed. Most prepackaged foods must carry a complete list of ingredients, including additives, in descending order of importance by weight. Specific regulations determine how and in what manner the required information is to be displayed on the label so that it will be easily seen by the purchaser. A free booklet entitled "Look at the Label", which explains the details of labeling requirements and includes a full list of additives used in the United Kingdom, may be obtained from the following office:

Ministry of Agriculture
Fisheries and Food (Publications)
Lion House, Willowburn Trading Estate
Alnwick, Northumberland NE66 2PF, England

Regarding food contaminants, the Lead in Food Regulations 1979 contain limits for lead in certain specified foods to which the general maximum limit of 1 mg/kg does not apply. Limits applying to fish are as follows:

Canned fish	1.0 mg/kg ⁽¹⁾
Dried fish	3.0 mg/kg
Shellfish	10.0 mg/kg
Fish not otherwise specified	2.0 mg/kg

- 1) Limits were reduced from 2 to 1 mg/kg effective on December 31, 1985. Food canned prior to this date which complies with the 2.0 mg/kg limit will be allowed for sale for a period of two years until December 31, 1987.

At present, there is no statutory limit controlling the level of mercury in foods. However, food containing levels of mercury unacceptable in the country of origin is not acceptable for import into the United Kingdom. Recommended levels of other heavy metals have been established. Some of these include:

Tin, in canned food	250 ppm
Copper	20 ppm
Zinc	50 ppm

The Arsenic in Food Regulations 1959, as amended, set a limit of 1.0 mg/kg for arsenic in fish and shellfish, with a provision for exemption where the arsenic is naturally present in fish. These regulations are currently being reviewed.

Unless otherwise subject to or exempted by specific regulations, all imports of food into the United Kingdom are subject to the Imported Food Regulations of the Ministry of Agriculture, Fisheries and Food. Broadly, these regulations require that all food entering the U.K. be sound, wholesome and fit for human consumption. The Imported Food Regulations of the Ministry of Agriculture, Fisheries and Food of 1868 and 1973 have been consolidated into one document, the Imported Food Regulations of 1984. Imported food which is prepackaged and intended for immediate retail sale to the consumer must comply with the current food labeling regulations as well as those which regulate the composition and advertising of food.

Under the Imported Food Regulations, all imported seafood must comply with public health regulations. A health certificate should be obtained from the National Marine Fisheries Service for all fishery products exports to the U.K. In order to insure the quickest possible clearance for shipments, it is suggested that the following information be provided with each consignment:

- * Species of fish/shellfish
- * If fresh, when and where it was caught
- * Nature of any processing (including any preservatives used, flavorings, coloring agents, etc.)
- * Information about any tests conducted on samples of the consignment, including nature of the tests, name of the laboratory conducting the tests, and the results.

The Food (Control of Irradiation) Regulations of 1967, as amended, prohibit the import into, and sale of food in the U.K. that has been subjected to ionizing radiation.

The import of certain species of shellfish whether alive, dead, or processed is prohibited unless done so under license. Details about the specific legislation can be obtained from:

Ministry of Agriculture
Fisheries and Food
Fisheries Division IIB
Lion House, Willowburn Trading Estate
Alnwick, Northumberland NE66 2PF
England

Other prohibitions and restrictions on the importation of live or dead fish, for example for reasons of conservation or disease are administered by HM Customs and Excise. Detailed information of these can be obtained from the following Office:

HM Customs and Excise, CDB(2)
Kent House, Upper Ground
London, SE1, England

The general provisions of the Trade Descriptions Act 1968, as amended, and the Weights and Measures Act 1963 also apply to all food and food products when sold for human consumption. There are no specific regulations governing type of packaging. Exporters should conform to accepted commercial practices.

Import documentation requirements, as of January 1984, are listed below. These can change frequently so exporters should check with their buyer or agent to confirm or update these requirements.

- Air Way bills - nine copies on IATA forms.
- Bill of Lading - no regulations.
- Sanitary Certificate - Required. This document is available from the seafood inspection office of the National Marine Fisheries Service.
- Certificate of Origin - three copies certified by a recognized Chamber of Commerce, consular legalization not required. This document is only required for goods consigned to the United Kingdom from a country other than the country of origin.
- Commercial Invoice - two signed copies with full description of goods, F.O.B. and C.I.F. prices, gross and net weight and country of origin. Three copies required of shipping all express.
- Shippers Export Declaration - four copies.
- Import License - required only for restricted items.

V. Summary of U.S. Export Opportunities

Whitefish is likely to remain the predominant seafood consumed in the United Kingdom. For this reason, the most promising export opportunities are for species such as Alaska pollock, sablefish, and Pacific cod. Pacific whiting offers less opportunity because low-cost supplies of whiting already are available.

The best customers for U.S. groundfish exports are the major seafood processors such as Birds Eye Foods, Findus, Ross Foods, Youngs Foods, Brekkes Foods, and Marr Frozen Foods. Exporters should make certain that the product is of the best quality due to the time and distance required for transport.

The trend toward convenience food is increasing market opportunities for processed seafood products. Ready-prepared meals and other products utilizing Alaska pollock and Pacific cod, as well as other species, could have export potential.

The market for canned and frozen salmon will likely remain strong. U.S. exporters, however, are going to be facing increasing competition from Canada, Norway, and Scotland in the fresh and frozen markets and the U.S.S.R. in the canned market. Thus, promotional programs and other market development efforts are going to be required to maintain or increase market share.

Because the British are not large consumers of shellfish, the opportunities for export of shellfish appear to be limited. The market for U.S.-produced crab has been adversely affected by the strong dollar and declines in U.S. production. However, when the crab fisheries recover, opportunities for export may exist due to the growing demand for specialty shellfish.

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APPENDIX I

SEAFOOD BUYER CONTACTS
FROM VARIOUS TRADE SHOWS
1980-1985

LISTED BY PRODUCT INTEREST

<u>Product Name</u>	<u>Refer To Company Number</u>
Albacore	28
Bluefish	76, 147, 170
Carp	37, 125, 169
Catfish	66, 169, 190
Clams	45, 47, 53, 131, 137, 157, 159, 163, 177, 186
Cod	64, 138, 142, 178
Crab: General	40, 45, 63, 64, 66, 74, 81, 83, 85, 90, 96, 113, 134, 146, 150, 166, 178, 181
Blue	120, 131, 136, 175, 178, 181, 187
King	11, 73, 190
Snow	11, 171
Stone	83, 190
Crawfish	96, 175
Crevalles	76
Spiny Dogfish	31, 145, 147, 153, 170, 174
Eel	70, 179, 182
Finfish, General	14, 37, 43, 44, 62, 65, 74, 75, 82, 83, 84, 93, 97, 98, 100, 104, 105, 111, 120, 125, 126, 127, 130, 132, 137, 151, 170, 185
Flounder	163
Grouper	71, 82
Halibut	64, 81, 190
Herring	111, 158
Lobster: General	2, 3, 9, 29, 65, 74, 83, 116, 118, 122, 129
Spiny	26
Mackerel	79, 129, 157

<u>Product Name</u>	<u>Refer To Company Number</u>
Menhaden	89
Monkfish	65, 137, 147
Mullet	71, 126, 164, 176
Mussels	116
Ocean Perch	89, 169
Octopus	178
Oysters	163
Pollock	150, 178
Prawns	166
Processed Seafood Products	42, 48, 50, 60, 79, 81, 82, 86, 102, 108, 113, 121, 127, 131, 132, 134, 146, 150, 152, 154, 157, 168, 176
Redfish or Red Drum	89, 137
Red Snapper (<u>Lutjanus campechanus</u>)	26, 71, 82, 117, 144, 190
Rockfish	175
Salmon	11, 57, 64, 68, 73, 81, 92, 96, 123, 148, 150, 170, 174, 180, 182, 190
Salmon Roe	87
Sardines	82, 117
Scallops	184
Scampi	186
Scup	147, 170
Sea Bass	71
Seafood: General	1, 5, 8, 10, 12, 13, 15, 16, 17, 18, 19, 20, 22, 24, 25, 27, 32, 33, 35, 36, 39, 52, 54, 55, 59, 61, 69, 91, 94, 95, 99, 101, 103, 107, 108, 119, 121, 127, 128, 130, 133, 139, 141, 143, 154, 156, 160, 161, 162, 167, 172

<u>Product Name</u>	<u>Refer To Company Number</u>
Sea Trout	162
Sea Urchins	88,189
Shark	71, 133
Shellfish: General	38, 43, 44, 58, 60, 75, 86, 98, 111, 126, 127, 144, 151, 165, 185
Shrimp	2, 11, 14, 21, 40, 66, 74, 76, 77, 80, 108, 117, 118, 135, 146, 150, 157, 166, 170, 189
Skate Wings	83, 137
Smelt	72
Squid: General	4, 23, 33, 41, 49, 51, 56, 67, 70, 78, 89, 106, 116, 130, 131, 136, 137, 146, 148, 155, 159, 163, 173, 175, 177, 178, 190
<u>Illex</u>	129, 145, 147, 162, 187
<u>Loligo</u>	138, 145, 147, 152, 162
Sturgeon	182
Swordfish	9, 110, 133
Tuna	9, 46, 71, 88, 126, 137, 162
Whitefish	7, 22, 25, 34, 37, 112, 124, 125, 147, 165
Whitefish Roe	6, 30, 43, 115
Whiting	129, 138, 153, 162, 187

APPENDIX II

SEAFOOD BUYER CONTACTS
FROM VARIOUS TRADE SHOWS
1980-1985

LISTED ALPHABETICALLY BY
COMPANY NAME

1. Company: A.P.H. Fish International, Ltd.
Address: South Darenth Cold Store
St. Margarets Farm
South Darenth, Dartford
Kent
Telephone: Farningham 865225
Telex: 885496
Contact: None listed
Type of Company: Importer/Wholesaler to retail food stores.
Interest: All varieties of seafood

2. Company: A.W. Butler (Wholesale) Ltd.
Address: 53 Butts Green Road
Emerson Park
Hornchurch, Essex RM11 2JS
Telephone: (01) 5150674
Telex: Office: Hornchurch 43316/43916/45302/72527
Contact: A.W. Butler Jr.
Type of Company: Wholesaler, Billingsgate Market
Interest: Lobster, shrimp

3. Company: Abbeyfreeze Frozen Foods
Address: 9 Allenbrooks Station Rd.
Wymondham
Norfolk
England
Telephone: (0953) 606256
Contact: John Patston
Type of Company: Wholesaler
Interest: Spiny lobster tails

4. Company: Aberdeen Prime Fish
Address: 73 Netherlands Rd.
Oakleigh Port
Barnet ENJ 1BS
England
Telephone: (01) 4464148
Telex: 21979
Contact: Anthony M. Tovev
Type of Company: Importer/Exporter
Interest: Squid

5. Company: Aimcalm Ltd.
Address: Unit 4,
Chapman Park Industrial Estate
High Road, Willesden
London N.W. 10, England
Telephone: (01) 4514377/8
Contact: Geoffrey O'Brian
Type of Company: Importer/Wholesaler to major supermarket chains
Interest: New products for fresh market

6. Company: Alan Porter Provisions Ltd.
 Address: Farnley Square, Farnley
 Otley, Leeds
 Yorkshire
 England
 Telephone: 466348
 Contact: Alan Porter
 Type of Company: Distributor
 Interest: Whitefish roe
7. Company: Alveston Kitchens
 Address: Warwick House
 Birmingham Road
 Warwickshire CV 37 6SH
 England
 Telephone: (0926) 490174
 Telex: 311282
 Contact: Stephen Tomlison
 Type of Company: Retailer
 Interest: Whitefish for processing
8. Company: Anglo European Foods Limited
 Address: Arctic House
 West Kent Cold Store
 Rye Lane, Dunton Green
 Sevenoaks, Kent
 Telephone: Sevenoaks (0732) 460611
 Telex: 957531
 Contact: Ken Keen
 Type of Company: Distributor to retail markets/food service
 Interest: All varieties of frozen seafood
9. Company: Ark Fisheries
 Address: 51/52 Cliffs High Street
 E. Sussex E. So.
 England
 Telephone: 476912
 Contact: Aetdes Roe
 Type of Company: Retailer
 Interest: Shark, swordfish, tuna, lobster
10. Company: Armour
 Address: C/O Food Brokers Ltd.
 Milbourne, Copsem Lane
 Esher, Surrey
 Telephone: (0372) 66891
 Telex: 929873
 Markets Serviced: Import
 Interest: All varieties of seafood

11. Company: Arpino Gibbs Frozen Foods Ltd.
 Address: Unit 8 Coldharbour Ind. Est.
 129/131 Coldharbour Ln. London
 SE5 9NY England
 Telephone: (01) 2744051
 Telex: 8953538 Verona
 Contact: Mario Arpino
 Type of Company: Importer/Wholesaler/Distributor
 Interest: King crab, snow crab, shrimp, canned
 salmon
12. Company: Associated Cold Stores & Transport Limited
 Address: Park Lane, Wolverhampton
 WV 10 90D
 England
 Telephone: (0902) 731611
 Telex: 339905
 Contact: P.C. Hudson
 Type of Company: Distributor
 Interest: Will provide distribution network for seafood
 products
13. Company: Associated Fisheries
 Address: 16 Queens Gate
 London SW1
 Telephone: (01) 2220404
 Telex: 262224
 Type of Company: Importer
 Interest: All varieties of seafood
14. Company: Atalanta (U.K.) Ltd.
 Address: Imperial House, Dominion St.
 London EC2M 2SA
 England
 Telephone: (01) 6067231
 Telex: 884947
 Contact: Traian Terletchi
 Interest: Fish, shrimp
15. Company: Atlantic Queen Seafoods
 Address: 924 Oxford Road, Tilehurst
 Reading, Berks RG3 6TB ENG
 England
 Telephone: (0734) 25544
 Telex: 848071
 Contact: David Ragan
 Type of Company: Importer
 Interest: All varieties of seafood

16. Company: B & A Roome
 Address: 43 Sadlergate
 Derby
 England
 Contact: A. Roome
 Type of Company: Buyer
 Interest: All varieties of seafood
17. Company: Banner Seafoods Ltd.
 Address: 20 Quay Walls, Berwick upon Tweed,
 TD15 1HB Northumberland, U.K.
 Telephone: (0289) 308475/308477
 Telex: 537464 BANNER G
 Contact: A.N. Sedgwick
 Type of Company: Processor/Wholesaler
 Interest: All varieties of seafood
18. Company: Bards Smoked Salmon, Ltd.
 Address: 2 Salamans Way
 Ferry Lane
 Rainham, Essex RM 13 9UL
 Telephone: (04027) 22533
 Telex: 895-1436
 Type of Company: Importer
 Interest: All varieties of seafood
19. Company: The Bar Flv
 Address: 5 Avery Row
 London W1X 9HA
 England
 Telephone: (01) 4939744
 Telex: 261376
 Contact: Nicholas A. Mobbs
 Type of Company: Restaurant
 Interest: All varieties of seafood
20. Company: Beckdale Foods Limited
 Address: 16 Main Street
 Wilsford, Grantham
 Lincolnshire NG323NS
 England
 Telephone: (0400) 30520
 Telex: 37270
 Contact: Gordon J. Sanders
 Type of Company: Importer
 Interest: All varieties of seafood
21. Company: Beefeater Steak Houses Ltd.
 Address: Luron Road
 Dunsmable, Beds
 Telephone: (0582) 600144
 Contact: Ian Sannders
 Type of Company: Food service
 Interest: Shrimp

22. Company: Birdseye Wall's, Ltd.
 Address: Station Avenue
 Walton on Thames
 Surrey KT12 INT
 Telephone: (0932) 228888
 Telex: 261255
 Type of Company: Importer/Processor
 Interest: All varieties of seafood, especially whitefish
23. Company: Birmingham Salmon Ltd.
 Address: Unit 19
 Wholesale Street Birmingham
 England
 Telephone: (021) 6222018
 Contact: Bill Chnibber
 Type of Company: Wholesaler
 Interest: Squid
24. Company: Blue Crest
 Address: Murray Street
 Grimsby Docks
 Grimsby, South Humberside
 Telephone: Office: (0472) 45156
 Factory: (0472) 44781
 Telex: 527768
 Contact: Mike Crooks
 Type of Company: Importer/Processor
 Interest: All varieties of seafood
25. Company: Brekkes, Ltd.
 Address: William Wright Dock
 Hull, England
 Telephone: Hull 27396 (10 lines)
 Telex: 52109
 Contact: Peter R. Lovell
 Type of Company: Importer/Processor
 Interest: All varieties of seafood, especially whitefish
26. Company: Bretton Fisheries
 Address: Rightwell Center
 Bretton
 Peterborough PE3 8DS
 England
 Telephone: 265383
 Contact: John Waller
 Type of Company: Buyer
 Interest: Snapper, spiny lobster

27. Company: Bromham Hospital
 Address: N. Hampton Road
 Bromham, Bedfordshire
 England
 Telephone: Oakley 2095 Ext.12
 Contact: G.A. Minney
 Type of Company: Buyer/Importer
 Interest: All varieties of seafood
28. Company: Buitoni Foods
 Address: Wilson Road, Huyton
 Liverpool, England
 Telephone: (051) 4807333
 Telex: 628049
 Contact: David J. Clarke
 Type of Company: Processor
 Interest: Albacore
29. Company: C & A Seafoods
 Address: 88 Billingsgate Market
 West India Dock Road
 London E14 8ST England
 Telephone: (01) 5559192
 Contact: C.V. Seagrave
 Type of Company: Importer
 Interest: Lobster
30. Company: Champagne Exchange
 Address: 17 C. Curzon St.
 London W.1
 England
 Telephone: 4031606
 Contact: A.D. Marks
 Type of Company: Restaurant
 Interest: Whitefish
31. Company: China Products Co.
 Address: P.O. Box 140056
 2322 Ponce De Leon
 Coral Gables, Florida 33134
 Telephone: (305) 4460498
 Telex: 522716 AMIGO
 Contact: Dr. Felix Mar-Quand
 Type of Company: Importer/Exporter
 Interest: Dried or frozen dogfish fins
32. Company: Clipper Fish Products
 Address: 159 N. Esplanade East
 Aberdeen, Scotland
 Telephone: (0224) 596204
 Telex: 73659
 Contact: None listed
 Type of Company: Importer
 Interest: All varieties of seafood

33. Company: Clouston Foods Europe Limited
 Address: 924, Oxford Road, Tilehurst
 Reading, Berkshire, RG3 6TB
 England
 Telephone: Reading (0734) 25544
 Telex: 848071/848026
 Contact: Richard West
 Type of Company: Importer/Exporter
 Interest: All varieties of seafood, especially squid
34. Company: Cobent Garden Fishmongers
 Address: Jubilee Market
 Covent Garden
 London W.C.2
 England
 Telephone: (01) 9959273
 Contact: Philip Diamond
 Type of Company: Unknown
 Interest: Fresh whitefish
35. Company: Cold Water Fish, Ltd.
 Address: Aston Road
 Bampton, Oxford, OXB 2AF
 England
 Telephone: (0993) 850818
 Telex: 837349
 Contact: Weston Lloyd
 Type of Company: Importer
 Interest: All varieties of seafood
36. Company: Collins Seafoods
 Address: Edward Street
 Bishop Auckland Co Durham
 England
 Contact: R. Collins
 Type of Company: Importer/Retailer
 Interest: All varieties of seafood
37. Company: Coln Valley Fish & Game
 Address: Windon
 Cirencester
 England
 Telephone: (0285) 724000
 Contact: John R. Davis
 Type of Company: Importer
 Interest: Fish for smoking, whitefish, carp
38. Company: Coumbrae Oysters
 Address: 40 Westbourne Gardens
 Glasgow G12 9PF
 Scotland, U.K.
 Telephone: (041) 3395138
 Contact: R.B. Cousins
 Type of Company: Importer/Exporter
 Interest: Shellfish

39. Company: Dale's of Liverpool, Ltd.
 Address: 325 Prescott Road
 Liverpool L13 3AT
 England
 Telephone: (051) 2204341
 Contact: Peter Toles
 Type of Company: Distributor
 Interest: All varieties of seafood, fresh and frozen
40. Company: Dan-Maid Seafoods
 Address: Barrow House,
 Bishopstrow, Warminster,
 Wiltshire, U.K. BA129UH
 Telephone: Warminster (0985) 214656
 Telex: 449357
 Contact: None listed
 Type of Company: Importer/Exporter
 Interest: Crab, shrimp
41. Company: Dawnfresh Seafoods, Ltd.
 Address: North Shore
 Whitehaven
 Cambria CA287XQ
 England
 Telephone: (0946) 61141
 Telex: 64283
 Contact: John V. Catherall
 Type of Company: Importer/Exporter
 Interest: Squid
42. Company: Denvale Serives
 Address: Moorside Markland Hill Lane
 Bolton Lancs
 England
 Contact: N. Widocks
 Type of Company: Distributor
 Interest: Processed seafood products
43. Company: Devon Oysters, Ltd.
 Address: Hillcrest Frogmore
 Devon
 Contact: Paul Mellur
 Type of Company: Processor/Distributor
 Interest: Whitefish roe, shellfish, finfish
44. Company: Downing Frozen Foods Limited
 Address: 6 South Street
 Ipswich, Suffolk, IP1 3 NU.
 Telephone: Ipswich (0473) 55065/6
 Telex: 987045
 Contact: Robert A. Stock
 Type of Company: Importer/Distributor
 Interest: Shellfish, finfish

45. Company: Dragon & Phoenix Ltd.
 Address: 15-18 White Lion St.
 London N.1 9PD.
 England
 Telephone: (01) 8370146
 Contact: D. Lyen
 Type of Company: Importer/Distributor
 Interest: Clams, crab
46. Company: Dudley Flowers Cottage
 Address; Speen Alesbury
 Buckinghamshire, England
 Telephone: (024) 028397
 Telex: Will have soon
 Contact: None listed
 Type of Company: Importer
 Interest: Tuna
47. Company: Dyfed Enterprises Ltd.
 Address: 30 Danlan Parks
 Pembrey, Lhanelli Dyfed,
 SA16000
 England
 Telephone: (05546) 3367
 Type of Company: Wholesaler
 Interest: Clam products
48. Company: East Anglia's Premier Fish Merchant
 Address: St. Ives
 Telephone: (0480) 65135
 Contact: Davie A. Jennings
 Type of Company: Retailer/Food Service
 Interest: Seafood delicacies
49. Company: East Lincolnshire Seafoods
 Address: Unit 19 Broadfield Lane
 Industrial Estate Boston
 Lincolnshire
 England
 Telephone: (0205) 66351
 Contact: None listed
 Type of Company: Importer/Retailer
 Interest: Squid
50. Company: Eliko Food Distributors, Ltd.
 Address: Unit D, Ashley Works
 Ashley Road
 London, N17 9LJ, England
 Telephone: (44) 18014311
 Telex: 893945 Eliko G
 Contact: E. Kohn
 Type of Company: Distributor
 Interest: Kosher canned seafoods

51. Company: Entrade Limited
 Address: 75 Davies Street
 London W1Y 1FA
 England
 Telephone: (493) 7937
 Telex: 23622
 Contact: Erdil Nami
 Type of Company: Importer
 Interest: Squid
52. Company: F. Smales & Son
 Address: West Dock Street
 Hull
 England
 Telephone: (0482) 24997
 Telex: 527260
 Contact: Ron B. Bray
 Type of Company: Retailer
 Interest: All varieties of seafood
53. Company: Finishing Touch
 Address: 13 Lowndes Squire
 London SW.1
 England
 Telephone: (245) 9659
 Contact: Ronald Mills
 Type of Company: Distributor
 Interest: Clams
54. Company: Fishmongers
 Address: 29 Thistle Street
 Aberdern
 Scotland
 U.K.
 Contact: Ken Watmough
 Type of Company: Unknown
 Interest: All varieties of seafood, fresh and frozen
55. Company: Flying Goose Limited
 Address: Barrow House, Bishopstrow
 Warminster, Wiltshire BA12 9HU
 England
 Telephone: (0985) 2144565
 Telex: 449743
 Contact: Ian Frostick
 Type of Company: Importer
 Interest: All varieties of seafood

56. Company: Fodeco (U.K.) Ltd.
 Address: 57 Windmill Street
 Gravensend Kent DA 12 1BB
 England
 Telephone: (0474) 50833
 Telex: 96364
 Contact: Bo V. Larsen
 Type of Company: Distributor
 Interest: Squid
57. Company: Food Brokers, Ltd.
 Address: 3 Copsem Lane
 Esher, Surrey
 England
 Telephone: (0372) 66891
 Contact: James E. Bishop
 Type of Company: Importer/Broker
 Interest: Canned salmon
58. Company: Fresh Seafoods (Barry) Ltd.
 Address: 3 Western Shelters
 Barry Island
 Barry South
 Glamorgan Wales
 Telephone: (0446) 745579
 Contact: L.D. Neale
 Type of Company: Importer/Food Service
 Interest: All shellfish
59. Company: G.C. Baxter, Ltd.
 Address: Sarre, Nr. Birchington
 Kent CT7 OLD
 Telephone: Thanet (0843) 81601/9
 Telex: 96408
 Contact: A. Baxter
 Type of Company: Food Service
 Interest: All types of seafood
60. Company: G.E. Roberts Fish Game & Catering Foods
 Address: Killick Way Williton
 Taunton
 Contact: George Roberts
 Type of Company: Wholesaler
 Interest: Shellfish, seafood delicacies
61. Company: G.M.W. International, Ltd.
 Address: Suite M4
 Victoria House
 37/63 Southhampton Row
 London WC1B 5HR
 Telephone: (01) 4059541, (01) 4054882
 Telex: 261611 INTRAD G
 Interest: Not specified.

62. Company: G.R. Food Products
 Address: 99A Regina Road
 Southall
 Middlesex, England
 Contact: None listed
 Type of Company: Processor
 Interest: Finfish suitable for pickling
63. Company: Galaxy Frozen Foods
 Address: 87 Raedwald Drive
 Moreton Hall
 Bury St. Edmunds
 Suffolk
 Telephone: Bury St. Edmunds (0284) 4602
 Contact: Russell Scott Wilds
 Type of Company: Wholesaler
 Interest: Crab
64. Company: Gatwick Flight Catering, Ltd.
 Address: Woolborough Lane
 Crawley W. Sussex, RH 10 2AQ
 England
 Telephone: (0293) 517515
 Telex: OPS 877891
 Contact: Dave Williams
 Type of Company: Airline caterer
 Interest: Cocktail claws, portion controlled salmon,
 halibut and cod
65. Company: Gibraltar Cold Store Ltd.
 Address: P.O. Box 110 Gibraltar
 England
 Telephone: 75501-4
 Telex: 2217GK
 Contact: Robert Benson
 Type of Company: Importer/Retailer
 Interest: Monkfish, lobster, fish
66. Company: Gingercross
 Address: Widford Road
 Much Hadham
 Herts 59 10 6AT
 Contact: Dr. M.J. Smith
 Type of Company: Importer/Retailer
 Interest: Crab, shrimp, catfish
67. Company: Godrevy Seafoods
 Address: Unit 2
 Penbeagle Industrial Estate,
 St. Ives Cornwall
 England
 Telephone: (0736) 798245
 Contact: Anthony Gilbert
 Type of Company: Importer
 Interest: Squid for bait

68. Company: Goodfare Products
 Address: Moston Road
 Middleton Junction
 Manchester
 England
 Telephone: (061) 6435252
 Telex: 668392
 Contact: Michael E. Hyman
 Type of Company: Importer
 Interest: Salmon products
69. Company: Grand Fisheries, Inc.
 Address: 1 Brook Lane
 Flitton, Bedfordshire
 MK45 6TU
 England
 Telephone: (0525) 60403
 Contact: Somerset Moore
 Type of Company: Wholesaler
 Interest: All varieties of seafood
70. Company: H. Binfield & Son
 Address: 4 High St. Seaford
 East Sussex BN25 1PG
 England
 Telephone: (0323) 892214
 Contact: Andrew Binfield
 Type of Company: Retailer
 Interest: Squid, eel
71. Company: H. Kilburn Ltd.
 Address: 18 The Arcade Market Hall
 Huddersfield, West Y
 England
 Telephone: (0484) 21298
 Contact: Martin Manfield
 Type of Company: Importer
 Interest: Snapper, tuna, mullet, shark, sea bass,
 grouper
72. Company: H & S Openshaw, Ltd.
 Address: Barrack St./Ormond St.
 Bolton
 England
 Telephone: 34585
 Telex: 635739
 Contact: Peter Kay
 Type of Company: Importer/Exporter
 Interest: Smelt

73. Company: Hales Snails
 Address: 25 Pages Walk
 London SE1 4SB
 England
 Telex: 987506
 Contact: Richard Hales
 Type of Company: Importer
 Interest: King crab, smoked salmon
74. Company: Hatton Rock Trout Farm, Ltd.
 Address: The Aquacultural Research Centre
 Hatton Rock
 Stratford upon Avon
 Telephone: (0789) 296266
 Contact: R.B. Towle, M.D
 Type of Company: Importer/Exporter/Distributor
 Interest: Lobster, crab, claws, shrimp, finfish
75. Company: Holden's Food Marketing Ltd.
 Address: 169 Chaddom Road
 Taunton Somerset
 Contact: Peter Holden
 Type of Company: Distributor to retail
 Interest: Shellfish, finfish
76. Company: Hosier Lane Trading Co.
 Address: 2527 Hosier Lane
 West Smithfield ECI
 Telephone: (01) 2483510
 Contact: Ian Bastable
 Type of Company: Wholesaler/Exporter
 Interest: Squid, rock shrimp, crevalles, bluefish
77. Company: Ice 'N' Easy (Seafoods), Ltd.
 Address: Unit 6, Burns Way Industrial Estate
 Holmbush Potteries
 Faygate, Horsham
 West Sussex, RH12 4SE
 Telephone: Faygate (029383) 451/2
 Telex: 877061 ICEASY G
 Contact: D. Becarevic
 Type of Company: Importer/Exporter
 Interest: Shrimp
78. Company: Ice-Pak Seafood Specialists
 Address: 5 Medway
 Queensbury
 Bradford
 England
 Telex: 919021
 Contact: Alan E. Cantrill
 Type of Company: Importer
 Interest: Squid

79. Company: Imperial Inns & Taverns Ltd.
 Address: Pier House
 Strand-on-the-Green Chiswick
 London W4 3NN
 England
 Telephone: (01) 9213131
 Telex: 919021
 Contact: Mike McGrath
 Type of Company: Distributor
 Interest: Canned seafood for distribution to Middle
 East, frozen mackerel
80. Company: Impwell Limited
 Address: 2 Wilkes Street
 London E1 6QF
 Telephone: (01) 2472411
 Telex: 8814836
 Contact: None Listed
 Type of Company: Importer
 Interest: Large shrimp
81. Company: International Catering, Ltd.
 Address: Horton Road
 Colnbrook Slough SL3 0BB
 England
 Contact: Fred G. Franklin
 Type of Company: Caterer
 Interest: Crab products, portion controlled salmon,
 and halibut
82. Company: International Seafoods
 Address: Franks Place, Headcorn,
 Kent TN27 9SX, England
 Telephone: Headcorn (0622) 890767
 Telex: 965800
 Contact: Peter Davis
 Type of Company: Importer/Distributor
 Interest: Snapper, grouper, sardines on private
 label, other types of finfish
83. Company: Island Pearl Seafoods
 Address: 57-63 Churchfield Road
 London W3 6AU
 Telephone: (01) 9928668/9
 Telex: 928519
 Contact: George C. Thomas
 Type of Company: Importer/Exporter/Distributor
 Interest: Skate wings, lobster, stone crab, crab
 claws, finfish

84. Company: J. Bennett (Billingsgate), Ltd.
 Address: 24 Billingsgate Market
 West India Dock Road
 Poplar, London E14 8St.
 England
 Telephone: (01) 5156007
 Telex: 8953998
 Contact: John W. Shelton
 Type of Company: Wholesaler
 Interest: Finfish for smoking
85. Company: J.L. Mawby & Co., Ltd.
 Address: Mawby House 28-32 Spittal Street
 Marlow Bucks SL7 3HJ
 Telephone: Marlow (06284) 72972
 Telex: 847962
 Contact: J.L. Mawby
 Type of Company: Importer
 Interest: Crab claws
86. Company: J. Van Smirren Co.
 Address: 30 Wharnecliffe Road
 Fishdocks
 Grimsby, S. Humberside
 Contact: Peter Martinelli
 Type of Company: Distributor
 Interest: Shellfish, new seafood products
87. Company: James Dinsdale Sons (Dent)
 Address: 60 Main St.
 Kirkby Lonsdale Cumbria
 England
 Telephone: K.L. 71237
 Contact: J.R. Goodyear
 Type of Company: Importer
 Interest: Salmon roe
88. Company: Japan Agency & Consultancy
 Address: 356 Regents Park Road
 London N3 2LJ
 England
 Telephone: (01) 3469273
 Telex: 24993 Tazaki
 Contact: Shingo Kanaoya
 Type of Company: Importer for restaurant trade
 Interest: Sea urchins, tuna
89. Company: Jaynike (London) Ltd.
 Address: 371 Horn Lane
 Western Avenue
 London W3 ODA, England
 Telex: None listed
 Contact: Roger Gurney or J. Diosi
 Type of Company: Importer directly to Nigeria
 Interest: Frozen menhaden, squid, redfish, ocean perch

90. Company: Johma Limited U.K.
Address: 797 London Road
Thornton Heath
Surrey CR4 6AW
Telephone: (01) 6842945
Telex: 946637
Contact: Terry Wynne (London)
Type of Company: Importer/Processor
Interest: Crabmeat
91. Company: John Henshall, Ltd.
Address: New Smithfield Market
Whitworth Street East
Manchester M11 2WJ
England
Telephone: (061) 2239411
Telex: 6678874
Contact: J.D. Henshall
Type of Company: Unknown
Interest: All varieties of seafood
92. Company: John Koch, Ltd.
Address: Office 72
Billingsgate Market West
Dock Rd. London
England
Telephone: (01) 9872872
Contact: Sydney D. Gibbard
Type of Company: Wholesaler
Interest: Salmon steaks
93. Company: John Lipscombe, Ltd.
Address: Office 24 (Shop 29)
Billingsgate Market, 87 West India
Dock Road,
London E14 8ST
Telephone: (01) 5154308
Telex: 8812703
Contact: P.W. McCoy
Type of Company: Distributor at Billingsgate Market
Interest: Finfish, sells to West Indian ethnic market
94. Company: John Martin
Address: Southwark Street
London SE1
Telephone: (01) 4031151
Telex: 8813121
Contact: None listed
Type of Company: Importer
Interest: All varieties of seafood

95. Company: John West
 Address: Stanley Street
 Liverpool
 Telephone: (051) 2368771
 Telex: 627188
 Contact: None listed
 Type of Company: Importer
 Interest: All varieties of seafood
96. Company: K.J. Lovering & Company, Inc.
 Address: 19 Station Avenue
 Calesham Sumy
 England
 Telephone: (0883) 49426
 Contact: Ken Lovering
 Type of Company: Importer/Retailer
 Interest: Salmon, crab, crawfish
97. Company: Kent Fisheries & Foods Ltd.
 Address: 4 Church Street
 Chatham, Kent ME4 4BS
 Telephone: (0634) 814597 & 826018
 Contact: A.T. Coppin
 Type of Company: Importer/Exporter
 Interest: Inexpensive finfish to export to Africa, Mideast, Eastern Europe
98. Company: King Frost
 Address: 9 Kilvin Drive
 Beverley North Humberside
 England
 Telephone: (0482) 80522
 Contact: C. Thompson
 Type of Company: Importer
 Interest: Finfish, shellfish
99. Company: Kiril Mischeff, Ltd.
 Address: Broadwall House
 21, Broadwall
 London SE1 9PL
 Telephone: (01) 9288966
 Telex: 25450
 Contact: None listed
 Type of Company: Importer
 Interest: All varieties of seafood
100. Company: Krondella Foods, Ltd.
 Address: Unit P Penfold Works
 Imperial Way Watford
 Contact: D.S. Clarke
 Type of Company: Exporter
 Interest: Inexpensive finfish for export to Egypt

101. Company: L & M Food Group
 Address: 454-456 Larkshall Road
 Highams Park
 London E4 9HH
 England
 Telephone: (01) 5317631
 Telex: 897334
 Contact: S. Hemphill
 Type of Company: Importer
 Interest: All varieties of seafood
102. Company: Les Amis Du Vin
 Address: 7 Ariel Way
 Whepherds Bush
 London W12 7SM
 England
 Telephone: (01) 7400053
 Contact: Melville Abraham
 Type of Company: Distributor
 Interest: Restaurant items
103. Company: Lintach Sales
 Address: 108 B Kilton Hill
 Workshop, Nottinghamshire
 England
 Telephone: (090) 9482984
 Contact: Mr. Thomas
 Type of Company: Unknown
 Interest: All varieties of seafood
104. Company: Lowestoff Col. Stone, Ltd.
 Address: Whaoloan Road
 Lowestoft, Suffolk England
 Telephone: 64476 64888
 Telex: 97145
 Contact: I.M. Hepton
 Type of Company: Exporter
 Interest: Flatfish, fresh and frozen
105. Company: L.G. Goodwin, Ltd.
 Address: Market Place
 Braintree, Essex
 Contact: R.L. Goodwin
 Type of Company: Distributor
 Interest: Fresh finfish
106. Company: Lusitania Sea Products
 Address: P.O. Box 2844
 Port Elizabeth 6056
 South Africa
 Telephone: (54) 4936
 Telex: 746244
 Contact: Carlos Simal
 Type of Company: Importer
 Interest: Squid

107. Company: M&J Seafoods
 Address: 3942 Rabans Close
 Rabans Lane Trading Est.
 Aylesbury Bucks
 England
 Telephone: (02) 9632711
 Contact: Larry Hay
 Type of Company: Distributor
 Interest: All varieties of seafood
108. Company: M.J. Dowdeswell & Co., Ltd.
 Address: The Bank House, Station Year
 Charfield, Wotton-under-Edge
 Gloucestershire GL12 8SY
 England
 Telephone: (0453) 854204
 Contact: Michael J. Dowdeswell
 Type of Company: Wholesaler
 Interest: Breaded shrimp and other varieties of seafood
109. Company: Mac Fisheries
 Address: Johnson House
 75179 Park Street
 Camberely, Surrey GU15 3ST
 Telephone: (0276) 63422
 Telex: 858915
 Contact: None listed
 Type of Company: Importer
 Interest: All varieties of seafood
110. Company: Mardon Export, Ltd.
 Address: The White House
 4-10 Queens Square
 Poulton-Le-Fylde
 Lancs. FY6 7BN
 England
 Telephone: (0253) 892514
 Telex: 677496 MARDEX G
 Contact: Tony Barton
 Type of Company: Importer/Exporter
 Interest: Swordfish
111. Company: Marinpro, Ltd.
 Address: Ferry Road
 Topsham, Devon
 England
 Telephone: 4671/2/3
 Telex: 42913
 Contact: W.J. Hoey
 Type of Company: Processor
 Interest: Herring, marinated, salt cured, frozen whole or
 filleted; finfish, shellfish

112. Company: Marr Frozen Foods, Ltd.
 Address: 102 Gillett Street
 Hull, North Humberside HU3 4JG
 Telephone: (0482) 26563
 Telex: 52461
 Type of Company: Processor
 Interest: All varieties of seafood, especially whitefish
113. Company: Marriott in Flight Catering
 Address: Faggs Road Feltham
 Middlesex
 England
 Telephone: (01) 7516131
 Telex: 25451
 Contact: Leonardo Farnocchia
 Type of Company: Caterer
 Interest: Stuffed crab, prepared seafood items
114. Company: Maytemp Ltd.
 Address: 48 Cawston Lane
 Dunchurch
 England
 Contact: G.L. Finnet
 Type of Company: Importer
 Interest: Stuffed crab
115. Company: The Mecca
 Address: 5 Orford Hill
 Norwich, Norfolk
 England
 Telex: 614829
 Contact: P. Barber
 Type of Company: Distributor
 Interest: Whitefish roe
116. Company: Midfish
 Address: 22-23 Fish & Poultry Market
 Birmingham Markets Precinct
 Pershore Street Birmingham
 England
 Telephone: (021) 6226244
 Telex: 336639
 Contact: Keith Smith
 Type of Company: Importer
 Interest: Squid, mussels, lobster
117. Company: Minch Shipping & Trading Co., Ltd.
 Address: 8 Shepherd Market
 Mayfair London W1
 Telephone: (01) 4992664/(01) 5158146
 Telex: 25234
 Contact: F.C. Doyle
 Type of Company: Distributor
 Interest: All varieties of seafood, especially shrimp, rock
 shrimp, sardines, red snapper

118. Company: Moray Seafoods, Buckie
 Address: Low Street, Buckie
 Bannshire, Scotland
 Telephone: Buckie, (0542) 31296
 Telex: 73287
 Type of Company: Wholesaler
 Interest: Shrimp & lobster for restaurant trade
119. Company: Muirson Food Brokers International, Ltd.
 Address: Northdown House
 Chapel Road
 Smallfield, Surrey
 Telephone: (034284) 33669
 Telex: 95386
 Contact: Hamish R. Muirhead
 Type of Company: Importer
 Interest: All varieties of seafood
120. Company: Musson & Co. (Liverpool), Ltd.
 Address: Russell House
 1-9 Saville Rd.
 Liverpool L13 4DJ England
 Telephone: (051) 2208081/2/3
 Telex: 629042 Musan G.
 Contact: Tim Howarth
 Type of Company: Wholesaler
 Interest: Frozen fish, blue crab meat, soft-shell crabs
121. Company: My Kinda Town, Ltd.
 Address: 5 Raphael Street
 Knightsbridge SW7
 England
 Telephone: (581) 7933
 Contact: Marrhew Sewell
 Type of Company: Importer/Retailer
 Interest: Unique seafood products
122. Company: Naizam Munjee
 Address: 24 Station Road
 Middlesex UB7 7BY
 West Drayton 42280
 Telephone: None listed
 Type of Company: Distributor
 Interest: Lobster
123. Company: Neptune Seafoods Limited
 Address: Dart Mills
 Buckfastleigh
 Devon TQ 11 ONF
 England
 Telephone: 43282
 Telex: 42671
 Contact: David Miles
 Type of Company: Processor
 Interest: Salmon

124. Company: Norfin
 Address: Barn House 38 Meadow Way
 Eastcote, Ruislip Middlesex
 HA48T London
 England
 Telephone: (01) 8681255
 Telex: 23383
 Contact: Jorma Kaartinen
 Type of Company: Importer
 Interest: Frozen whole whitefish in container loads
125. Company: Ocean Dream Ltd.
 Address: 113 the Fairway
 N7H Webley
 Middx
 England
 Telephone: (01) 9804341
 Contact: Marc Daniels
 Type of Company: Importer
 Interest: Smoked whitefish, carp, fish suitable for smoking
126. Company: Ocean Treasure
 Address: St. Ives
 Cornwall
 England
 Telephone: (0736) 793003
 Telex: 45435
 Contact: Ian N.M. Thompson
 Type of Company: Processor
 Interest: Tuna, red mullet, species of fish or shellfish suitable for smoking
127. Company: Oshawa Foods
 Address: 125 the Queensway
 Toronto, Canada M8Y 1H7
 Telephone: (416) 2596633
 Telex: 06-984846
 Contact: C.E. Candy
 Type of Company: Wholesaler (primarily to supermarkets)
 Interest: Consumer-ready, retail-packed products (fresh, frozen, canned), finfish, shellfish
128. Company: P & W
 Address: Unit WS4 Main Street
 West Wilts Trading Estate
 Westbury, Wiltshire
 England
 Telephone: (0373) 823990
 Contact: Peter I. Davidson
 Type of Company: Importer
 Interest: All varieties of seafood

129. Company: Parkin International
 Address: Unit 3
 Langthwaite Grange Industrial Estate
 S. Kirkby WF9 3AP
 West Yorkshire
 England
 Telephone: (0977) 49242
 Telex: 557839 PARKIN G
 Contact: Steve Billingham
 Type of Company: Importer/Exporter
 Interest: Whiting, frozen, whole; mackerel, frozen, whole; frozen
 lobster tails and whole frozen Illex squid. Exports to
 Mid-east markets.
130. Company: Paul Agnar Seafoods (U.K.), Ltd.
 Address: 17 Edison Road
 Bearbrook Industrial Project
 Rabans Lane Aylesbury
 England
 Telephone: (0296) 22377
 Telex: 837877
 Contact: Dennis B. Thomas
 Type of Company: Importer
 Interest: All varieties of seafood
131. Company: Petro Services, Ltd.
 Address: 153a Park Rd.
 St. John's Wood
 London NW8 7HT
 England
 Telephone: (01) 5869226
 Contact: R.J. Carobin
 Type of Company: Unknown
 Interest: Frozen products for retail trade; cleaned squid with
 tentacles, clam products, softshell crabs
132. Company: Pheonis Farm Foods
 Address: Unit D7
 Taylor Ind: Estate Culcheth
 Warrington Cheshire
 England
 Telephone: CULCHETH.6647
 Contact: R. Siequien
 Type of Company: Unknown
 Interest: Packaged fish products
133. Company: Pisces, Ltd.
 Address: Unit 1 Eoodford Park
 Industrial Estate
 Winsford Cheshire
 Contact: Niel J. Crawford
 Type of Company: Retailer
 Interest: Swordfish, shark, various varieties of seafood

134. Company: The Plough
 Address: Plough Lane Downside
 Clothshall Surey
 England
 Telephone: (0932) 62514
 Contact: None listed
 Type of Company: Unknown
 Interest: Prepared seafood products; stuffed crab
135. Company: Ponderosa, Inc.
 Address: Watford, England 21245
 Telephone: None listed
 Contact: Steve Cable
 Type of Company: Importer/Wholesaler
 Interest: Green, headless Gulf shrimp
136. Company: Porter Frozen Foods, Ltd.
 Address: Sulby House
 North Street
 Sudbury, Suffol CO 10 6 RE
 England
 Telephone: (0787) 310800
 Telex: 987506
 Contact: Richard Hales
 Type of Company: Unknown
 Interest: Squid, blue crab products
137. Company: Porter Foods
 Address: 23 Pages Walk
 London SE1 4SB, England
 Telephone: (02) 2312410
 Telex: 291979
 Contact: Martin Knights
 Type of Company: Importer
 Interest: Clams, all types of finfish, frozen, especially yellowfin tuna, skate, monkfish, sea trout, squid
138. Company: Poultry Products Ltd.
 Address: P.O. Box 539
 Valletta, Malta
 Telephone: 612451/3
 Telex: 1420 MW
 Contact: Anthony L. Psaila
 Type of Company: Importer
 Interest: Loligo squid tubes cleaned or frozen, whole, in 15 kg blocks; cod fillets, whiting fillets
139. Company: Princess Foods
 Address: Royal Liver Building
 Liverpool, England
 Telephone: (051) 2369282
 Telex: 628095
 Contact: None listed
 Type of Company: Importer
 Interest: All varieties of seafood

140. Company: Quayside Fish Centre
 Address: Porthleven, Cornwall
 England
 Telephone: HELSTON 62008
 Contact: John Strike
 Type of Company: Distributor
 Interest: Processed products for retail market
141. Company: R & A Seafoods (Northern), Ltd.
 Address: P.O. Box 11, Southport
 Merseyside PR9 7EJ
 England
 Telephone: (0704) 44156
 Telex: 946707
 Contact: Bernard A. Capper
 Type of Company: Importer
 Interest: All varieties of seafood
142. Company: R. Donnan & Sons
 Address: Trinity Pier, Millbay Docks
 Plymouth, Devon
 England
 Telephone: 662135
 Telex: 45235 DONNAN 4-G
 Contact: J.C. Cabello
 Type of Company: Importer
 Interest: Cod
143. Company: Ranch House Restaurant
 Address: Werters Restaurants, Ltd.
 9 Golders Green Road
 London NW 11
 Telephone: (01) 458 9164/3631
 Contact: R.P. Kane
 Type of Company: Distributor
 Interest: All varieties of seafood
144. Company: Riverglobe Limited
 Address: 8 Hazeldene Road
 Welling, Kent DA16 1NR
 England
 Telephone: (03) 30311211
 Contact: Bob Bartlett
 Type of Company: Distributor
 Interest: Shellfish, red snapper
145. Company: Robinson & Carr, Ltd.
 Address: Northgate, Sleaford
 Lincolnshire, U.K.
 Telephone: (0529) 302206
 Telex: 377569 Robco G
 Contact: Gordon J. Sanders
 Type of Company: Importer
 Interest: Dogfish backs and flaps, Illex and Loligo squid frozen,
 whole, 25 kg blocks

146. Company: Rosemary's
 Address: 157 Aylsham Road
 Norwich, NR3 2AD
 Telephone: (0603) 410083/400659
 Contact: J. Wilson
 Type of Company: Distributor
 Interest: Rock shrimp, squid, crab products
147. Company: Ross Foods, Ltd.
 Address: Ross House
 Grimsby, South Humberside
 DN31 3SW
 Telephone: (0472) 59111
 Telex: 52182
 Contact: John Briggs
 Type of Company: Importer/Processor/Distributor
 Interest: All varieties of seafood, especially squid (Loligo and Illex), monkfish, dogfish, bluefish, scup & species of whitefish
148. Company: S. Baron, Ltd.
 Address: Assembly Passage
 Mile End Road
 London E1 4UR
 England
 Telephone: (01) 7902246
 Telex: 887054
 Contact: Graham Evans
 Type of Company: Processor
 Interest: Salmon
149. Company: S & J Fisheries
 Address: 11 Quay Road
 Barbican, Plymouth
 England
 Telephone: 265556
 Contact: Joe Evans or Ken Sampson
 Type of Company: Wholesaler
 Interest: Cleaned squid tubes, block and retail pack
150. Company: S & W Berisford (Foods), Ltd.
 Address: Berisford House
 King Street, Middlewich
 Cheshire, CW 109 LY
 England
 Telephone: 4721
 Telex: 668173
 Contact: T.R. Conner
 Type of Company: Importer/Distributor to supermarkets
 Interest: Canned crab, shrimp, breaded products, salmon steaks, pollock products

151. Company: St. Edmond Foods, Ltd.
 Address: 8 Clarence Road
 Clare, Suffolk, CO10 8QN
 England
 Telephone: Clare (0787) 277346
 Telex: 98183
 Contact: John A. Baker
 Type of Company: Importer/Distributor
 Interest: All types of shellfish and finfish, fresh and frozen,
 new seafood items and specialty products.
152. Company: Sco-Fro Foods, Ltd.
 Address: 30 George Square
 Glasgow, Scotland
 Telephone: (041) 2211747
 Telex: 778131
 Contact: Stanley Ian Bernard
 Type of Company: Importer/Exporter/Processor
 Interest: Cleaned Loligo tubes
153. Company: Sea Products International
 Address: Harborne Court
 67-69 Harborne Road
 Edgbaston
 Birmingham B15 3BU
 England
 Contact: Roger Robbins
 Type of Company: Processor/Packer/Importer/Distributor
 Interest: Dogfish and whiting
154. Company: Sea Qual Fisheries, Ltd.
 Address: 202 Central Markets
 London, EC1A 9LJ
 England
 Telephone: (01) 2368609
 Telex: 881858 KEEVIL
 Contact: C.S. Angliss
 Type of Company: Importer
 Interest: Frozen seafood products
155. Company: Seven Seas, Ltd.
 Address: The Grove, High Street
 Swanley, Kent, BR8 8AJ
 United Kingdom
 Telephone: Swanley 60411/4
 Telex: 896644
 Contact: Eugene Y.H. So
 Type of Company: Importer/Exporter
 Interest: Squid

156. Company: Sherrards
 Address: 1 Digbeth St.
 Stow-on-the-Wold
 Gloucestershire
 GL54 1BN
 Telephone: Stow (0451) 317/33
 Contact: J.H. Webb
 Type of Company: Food service
 Interest: All varieties of seafood
157. Company: Shetland Fish Processors Assoc.
 Address: Albert Bdgs.
 Espanade, Lerwick
 Shetland Iles ZE1 OLL
 England
 Telex: 75350
 Contact: Sandy Clunes
 Type of Company: Distributor
 Interest: Clam chowder, mackerel, shrimp; also interested in retail ready products
158. Company: Sidwell & Co., Ltd.
 Address: Rosemount Tauer
 Strafford Road, Wallington
 Surrey, England SM6 8RT
 Telephone: (01) 6693211
 Telex: 261014
 Contact: E.J. Larcombe
 Type of Company: Unknown
 Interest: Canned herring in oil or tomato sauce, packed under private label if possible
159. Company: Simon's Fisheries
 Address: Shrewville, Ltd.
 Imperial House, Redlands
 Consdon Surrey CR3 2HT
 England
 Telephone: (668) 0931
 Telex: 946675
 Contact: Charles Organ
 Type of Company: Importer/Exporter
 Interest: Hard clams, cleaned squid tubes
160. Company: Smithfield Limited
 Address: London House
 Wharncliffe Road
 Grimsby, South Humberside
 DN3 13QF
 Telephone: (0472) 4126200
 Telex: 527287
 Contact: None listed
 Type of Company: Importer
 Interest: All varieties of seafood

161. Company: Somerset Salmon Smokers
 Address: Shadow Factory
 Halliatrow
 Avon
 Telephone: 53087
 Contact: None listed
 Type of Company: Importer/Wholesaler
 Interest: All varieties of seafood
162. Company: Southern Maid Seafoods
 Address: 57 Queen Street
 Deal, CT14 6HD
 England
 Telephone: (03045) 67739
 Contact: Patricia Dee
 Type of Company: Distributor
 Interest: Illex and Loligo squid, bluefin, scup, sea trout, whiting, other varieties of seafood in mixed containers
163. Company: Southern Ships Stores Ltd.
 Address: Test Ro Eastern Ducks
 Southhampton
 England
 Telephone: (070) 3229731
 Telex: 47550
 Contact: Virginia Fabricius
 Type of Company: Unknown
 Interest: Little necks, squid, flounder fillets, oysters
164. Company: Starfish Limited
 Address: Reker House
 17 Betts Avenue Martlesham
 Ipswich, Suffolk IP5 7RG
 England
 Telephone: (0473) 626662
 Telex: 988821
 Contact: Richard J. Sheepshanks
 Type of Company: Unknown
 Interest: Mullet and sheepshead for mincing
165. Company: Sutcliffe Catering
 Address: 197 Hatton Cross
 Heathrow, Middlesex
 England
 Telephone: (01) 7504660
 Contact: Ray Butler
 Type of Company: Chief buyer for Heathrow
 Interest: Whitefish, prawns, and shellfish

166. Company: Swan Foods International, Ltd.
 Address: 1 Kings Road
 Walton-on-Thames
 Surrey KT12 2RA
 Telephone: (09322) 47522/6
 Telex: 8954231 SWAN
 Contact: John McGougan
 Type of Company: Importer/Processor/Packer
 Interest: Rock shrimp, crab
167. Company: TW Seafoods, Ltd.
 Address: Meadow Lane
 Mottingham NG2 3GP
 London
 England
 Telephone: (0602) 860486
 Contact: George Taylor
 Type of Company: Supplier
 Interest: All varieties of seafood
168. Company: Talbot House
 Address: Wingfield Road
 Trowbridge, Wiltshire BA 149 ET
 England
 Telephone: (02214) 63391
 Contact: Chris Freeman
 Type of Company: Broker
 Interest: Seafood speciality items
169. Company: Thobani Frozen Foods, Ltd.
 Address: 10 Lansdowne Close
 Wimbledon
 London SW20 8AS
 England
 Telephone: (01) 9471431
 Telex: 943763
 Contact: Bahadur Thobani
 Type of Company: Importer/Distributor
 Interest: Carp, yellow perch, catfish, white perch in fillet form
 or headed and gutted
170. Company: Thomas Bennett (Fish Products), Ltd.
 Address: Great George Street
 Preston, Lancs.
 England
 Telephone: Perston (54375) 55059
 Contact: None listed
 Type of Company: Importer/Distributor
 Interest: Shrimp, salmon, scup, bluefish, dogfish and species not
 currently marketed in the U.K.

171. Company: Tiffany's
 Address: Wainwright Road
 Bexhill-on-Sea
 East Sussex TN39 3UR
 England
 Telephone: (0424) 216704
 Contact: D.G. Alfille
 Type of Company: Processor
 Interest: Opellio crab, 5 lb. blocks
172. Company: Toveys Seafood, Ltd.
 Address: 198 Stapleton Road
 Bristol (BS50NY)
 England
 Telephone: (0272) 510987
 Contact: Roger Tovey
 Type of Company: Distributor
 Interest: All varieties of seafood
173. Company: Truffles, Ltd.
 Address: 22 Aldensley Road
 London W.6
 England
 Telephone: (01) 7412138
 Contact: Annie Worrall
 Type of Company: Unknown
 Interest: Squid
174. Company: 24 Hours Frozen Seafoods
 Address: Preston Cold Storage
 Cromwell Road
 Preston PR2 6YD England
 Telephone: Preston (STD 0772) 701215
 Contact: Mark Donoghue
 Type of Company: Retailer
 Interest: Dogfish backs, salmon
175. Company: UIN Sullivan, Ltd.
 Address: 11 High Street
 Abergaueny, GWEWT
 England
 Telephone: (0973) 2331
 Contact: John Sullivan
 Type of Company: Retailer/Distributor
 Interest: Rockfish, squid, crawfish, blue crab
176. Company: U.S.P.I. (U.K.), Ltd.
 Address: 18 Avenue Road
 Belmont Surrey SM2 6JD
 Telephone: (01) 6438070
 Telex: 946918
 Contact: John C. McGarrick
 Type of Company: Importer/Exporter
 Interest: Salted-dried mullet, other dried fish products

177. Company: United Breweries Int., Ltd.
 Address: 17-21 Sunbeam Road
 Park Royal
 London NW10 6JP
 England
 Telephone: (01) 9652400
 Telex: 262888
 Contact: K.H. Tong
 Type of Company: Unknown
 Interest: Littlenecks, squid
178. Company: Van Ommeren U.K. Limited
 Address: 27 Leadenhall S.
 London EC3A 1AW
 England
 Telephone: (01) 4883242
 Telex: 895342 VANOM G
 Contact: Courtney H. Packer
 Type of Company: Trading Company
 Interest: Squid, octopus, scallops, crabmeat, soft-shell crabs,
 minced cod and pollock blocks
179. Company: W.A. Gricks & Sons, Ltd.
 Address: 316a High Street North
 London, E12 6SA
 England
 Telephone: (01) 4722502, (01) 4721791, or (01) 9894659
 Contact: Bill Gricks
 Type of Company: Wholesaler
 Interest: Frozen eels
180. Company: W & F Fish Products, Ltd.
 Address: 56/66, Crogsland Road
 Chalk Farm
 London, N.W.1
 England
 Telephone: None listed
 Contact: Mr. Fulberg
 Type of Company: Smoker
 Interest: Salmon
181. Company: Wavermas Company, Ltd.
 Address: 306A Sandycombe Road
 Kew, Richmond
 Surrey, TW9 3NG
 England
 Telephone: (01) 9403504
 Telex: 895 1859
 Contact: Dennis C. Lam
 Type of Company: Importer
 Interest: Whole blue crabs, crabmeat

182. Company: Weis House Trout Farms, Ltd.
Address: Latimer Road
Chelsham Bucks
England
Telephone: (0494) 775954
Contact: S.R. Williams
Type of Company: Processor
Interest: Salmon

183. Company: Welney Smoked Produce
Address: Welney, Wisbech
Cambs PE 14 9TA
London
England
Telephone: (035) 471200
Contact: Dan Ogier
Type of Company: Smoker
Interest: Sturgeon, eel

184. Company: Westend Shellfish
Address: Glenborrodale, Acharalle
Argyll
England
Telephone: (097) 24235
Contact: A.C. Bowker
Type of Company: Retailer
Interest: Scallops

185. Company: Western Isles Seafoods, Ltd.
Address: 1 Esplanalle Road
Stornoway Isle of Lewis
Western Isles
Scotland
United Kingdom
Telephone: (0851) 5807
Contact: Neil J. MacPherson
Type of Company: Processor
Interest: Finfish, shellfish

186. Company: Whitby Seafood Limited
Address: Cross House
Higham
Derbys, DEC 6EH
England
Telephone: (0773) 832876
Contact: John G. Whittle
Type of Company: Importer
Interest: Clams, clam strips, scampi

187. Company: Wintersun Frozen Foods, Ltd.
 Address: Northedown House
 Chapel Road, Smallfield
 Surrey RH6 9NW
 England
 Telephone: (034) 2842942
 Contact: Hamish R. Muirhead
 Type of Company: Importer/Exporter/Wholesaler/Distributor
 Interest: Whiting fillets, 10-15 kg blocks; Illex squid frozen,
 whole in 10-15 kg blocks, cleaned tubes or rings;
 soft-shell blue crab
188. Company: World Exports
 Address: 29 Holland Road
 Hove, Sussex
 BN3 1JE
 England
 Telephone: 777203
 Contact: B. Mehta
 Type of Company: Importer/Exporter
 Interest: Sea urchins
189. Company: Worldwide Marketing Co.
 Address: Adelphi Chambers
 53 Lime Street
 Liverpool L1 1J
 England
 Telephone: (051) 7091538
 Telex: 888941
 Contact: C.E.B. Ford
 Type of Company: Importer/Exporter
 Interest: Shrimp, headless, peeled and deveined
190. Company: Young's Seafood
 Address: Ixworth Place
 London SW3 3PU
 England
 Telephone: (01) 7309942/6
 Telex: 263735
 Contact: R.J. Ramuz
 Type of Company: Distributor
 Interest: King crab, stone crab, salmon, halibut, catfish, red
 snapper, squid

Source: U.S. Regional Fisheries Development Foundations

Trade Shows: SIAL '80
 SIAL '84
 IFE '83
 SIAL '84
 IFE '85

IFE - International Food and Drink Exhibit, London, England
 SIAL - Salon International de L'Alimentation, Paris, France
 ANUGA - Cologne, Germany

APPENDIX III
MAJOR SUPERMARKET CHAINS
AND
INSTITUTIONAL BUYERS

MAJOR SUPERMARKET CHAINS

1. Company: ASDA (Associated Dairies)
Address: Britannia Road
Morley, Leeds, Yorkshire
Telephone: (0532) 539141
Telex: 55315
2. Company: Finefare
Address: Gate House
Frepfern Road
Welwyn Garden City, Hertfordshire
Telephone: (0707) 328140
Telex: 24297
3. Company: Gateway Foods
Address: P.O. Box 197
Bishopswor, Bristol
Telephone: (0272) 785555
Telex: 43313
4. Company: Safeway
Address: Beddow Way
Aylesford, Maidstone, Kent
Telephone: (0622) 72000
Telex: 965037
5. Company: Sainsbury
Address: Stamford Street
London, S.E. 1
Telephone: (01) 9216000
Telex: 264241
6. Company: Tesco
Address: P.O. Box 18
Cheshunt, Hertfordshire
Telephone: (0992) 32222
Telex: 24138
7. Company: Waitrose
Address: Duncastle Road
Bracknell, Berkshire
Telephone: (0344) 424680
Telex: 847271

Source: BBH Corporation

MAJOR INSTITUTIONAL BUYERS

1. Centre Hotels (Cranston), Ltd.
Centre House
57 Russell Square
London WC1
Telephone: (637) 1661
2. Gardner Merchant Food Services, Ltd.
Divisional HQ
Pembroke House
Wellesley Road
Croydon
Telephone: (686) 4821
3. Inner London Education Authority
School Meals Food Planning
County Hall
Westminster SE1
London
Telephone: (633) 50000
4. Park Hotels, Ltd.
9 Cumberland House
Kensington Road
London W8
Telephone: (937) 1571
5. Trust House Forte, Ltd.
Forte Catering, Ltd.
River House, Mockbridge Road
Mockbridge
Wallington, Surrey
Telephone: (669) 4313

Source: U.S. Regional Fisheries Development Foundations

APPENDIX IV
EUROPEAN ECONOMIC COMMUNITY
1986 GUIDE AND REFERENCE PRICES FOR 1986

1986 GUIDE PRICES

<u>SPECIES</u>	<u>ECU/TON</u>	<u>USD/TON</u>
<u>Fresh Category</u>		
Herring	326	290
Sardines		
(a) Atlantic	537	478
(b) Mediterranean	459	408
Dogfish (<u>Squalus acanthias</u>)	861	766
Dogfish (<u>Scyliorhinus</u> spp)	814	724
Ocean Perch (<u>Sebastes</u> spp)	854	760
Cod	1183	1053
Pollock (Saithe)	643	572
Haddock	868	772
Whiting	791	704
Ling	902	803
Mackerel	283	252
Anchovies	578	514
Flounder 1/1 - 4/30/86	766	682
5/1 - 12/31/86	1045	930
Hake	2528	2249
Shrimp (<u>Crangon crangon</u>) (boiled)	1530	1361
<u>Frozen Category</u>		
Sardines	389	346
Sea-bream (<u>Dentex dentex</u> and <u>Pagellus</u> spp)	1249	1111
Squid (<u>Loligo vulgaris</u>)	2498	2223
Squid (<u>Todarodes sagittatus</u>)	1151	1024
Squid (<u>Illex illecebrosus</u>)	1209	1076
Cuttlefish (<u>Sepia officinalis</u> , <u>Rossia macrosoma</u> , <u>Sepiola rondeletti</u>)	1594	1418
Octopus	1223	1088

NOTE: ECU Conversion Rate = 0.889786 (as of 1/13/86)

REFERENCE PRICES

<u>+Fresh and Chilled Fish (Annex I)</u>	<u>ECU/TON</u>	<u>USD/TON</u>
Herring	236	210
Sardines		
(a) Atlantic	388	345
(b) Mediterranean	332	295
Dogfish (<u>Squalus acanthias</u>)	489	435
Dogfish (<u>Scyliorhinus</u> spp)	488	434
Ocean Perch (<u>Sebastes</u> spp)	692	616
Cod	852	547
Pollock (Saithe)	463	320
Haddock	625	556
Whiting	506	450
Ling	613	545
Mackerel	204	182
Anchovies	418	372
Flounder 1/1 - 4/30/86	572	509
5/1 - 12/31/86	781	695
Hake	2275	2024
 <u>+Boiled in Water</u>		
Shrimp (<u>Crangon crangon</u>)	895	796
 <u>Frozen Products (Annex II)</u>		
Sardines	331	295
Sea-bream (<u>Dentex dentex</u> and <u>Pagellus</u> spp)	1062	945
Squid (<u>L. vulgaris</u>)	2548	2267
Squid (<u>L. pealei</u>)	1486	1322
Squid (Other species)	1380	1228
Squid (<u>Todarodes sagittatus</u>)	1174	1045
Squid (<u>I. illecebrosus</u> , other species)	1234	1098
Cuttlefish (<u>Sepia officinalis</u> , <u>Rossia macrosoma</u> , <u>Sepiola rondeletti</u>)	1355	1206
Octopus	1040	925

<u>+Fresh, Chilled or Frozen Tuna</u> <u>(ANNEX III)</u>	<u>ECU/TON</u>	<u>USD/TON</u>
Yellowfin Tuna (<u>Thunnus albacares</u>)		
Weighing more than 10 kg each	906	806
Weighing not more than 10 kg each	825	734
Albacore Tuna (<u>Thunnus alalunga</u>)		
Weighing more than 10 kg each	1033	919
Weighing not more than 10 kg each	1314	1169
Other species	580	516
<u>Frozen Products (Annex IV)</u>		
Ocean Perch (<u>Sebastes spp</u>)		
Whole: With or without head	745	663
Other	1112	989
Filletts: With bones (standard)	1484	1320
Boneless	1745	1553
Blocks in immediate packing weighing not more than 4 kg	1940	1726
Minced blocks	922	820
Cod		
Whole: With or without head	874	778
Other	1319	1174
Filletts: *Industrial blocks, with bone (standard)	1922	1710
Industrial blocks, boneless	2197	1955
*Individual filletts, with skin	2042	1817
Individual filletts, skinless	2378	2116
Blocks in immediate packing weighing not more than 4 kg	2463	2192
Minced blocks	1002	892
Pollock (Saithe)		
Whole: With or without head	571	508
Other	844	751
Filletts: Industrial blocks, with bone (standard)	1176	1046
Industrial blocks, boneless	1282	1141
Individual filletts, with skin	1201	1069
Individual filletts, skinless	1330	1183
Blocks in immediate packing weighing not more than 4 kg	1427	1270
Minced blocks	654	582

Frozen Products (Annex IV) (continued)		<u>ECU/TON</u>	<u>USD/TON</u>
Haddock			
Whole:	With or without head	727	647
	Other	1004	893
Filletts:	Industrial blocks, with bone (standard)	1738	1546
	Industrial blocks, boneless	2194	1952
	Individual filletts, with skin	1989	1770
	Individual filletts, skinless	2259	2010
	Blocks in immediate packing weighing not more than 4 kg	2340	2082
Minced blocks		800	712
Mackerel			
Whole:	With head	326	290
	Headless	362	322
	Sides	482	429
Filletts		608	541
Hake			
Whole:	With or without head	674	600
	Other	1028	915
Filletts:	Industrial blocks, with bone (standard)	1030	916
	Industrial blocks, boneless	1212	1078
	Individual filletts, with skin	1069	951
	Individual filletts, skinless	1269	1129
	Blocks in immediate packing weighing not more than 4 kg	1340	1192
Minced blocks		787	700

NOTE: ECU Conversion Rate = 0.889786 (as of 1/13/86)

+ The reference prices given for fresh and chilled products are the highest applicable to the species to which they refer. Lower reference prices for different presentations, sizes, and freshness grades apply.

* "Industrial blocks" are laminated blocks.
"Individual filletts" include interleaved blocks.

Note: If any of the products listed above enter the Community at less than the appropriate reference prices, the EEC Commission may take action under Regulation 3796/81 to regulate imports of the products concerned.

APPENDIX V

EUROPEAN ECONOMIC COMMUNITY
TARIFF SCHEDULE FOR SELECTED
SEAFOOD IMPORTS FROM THE U.S.

(Effective from 12/9/85)

<u>TRADE DESCRIPTION</u>	<u>DUTY RATE (%)</u>
<u>Freshwater Eels</u>	
Fresh, chilled, or frozen	3.5
Smoked	14.0
<u>Salmon</u>	
Fresh, chilled, or frozen	2.0
Salted or in brine	
Whole, headless, or in pieces	11.0
Fillets	15.0
Smoked	13.0
<u>Herring</u>	
Fresh or chilled:	
Whole, headless, or in pieces:	
February 15 - June 15	Free
June 16 - February 14	15.0 (a, b)
Frozen:	
Whole, headless, or in pieces:	
February 15 - June 15	Free
June 16 - February 14	15.0 (a, b)
Fillets	15.0
<u>Tuna (yellowfin, albacore, other)</u>	
For industrial manufacture	22.0 (a, c)
Other uses:	
Fresh, chilled, or frozen	22.0 (a, c)
Frozen fillets	18.0
<u>Shark (all species)</u>	
Fresh or chilled:	
Whole or in pieces	8.0 (d)
Frozen:	
Whole or in pieces	8.0 (d)
Fillets	15.0
<u>Halibut</u>	
Fresh, chilled, or frozen	8.0
Dried, salted, or in brine	15.0
Smoked:	
Greenland halibut	15.0
Atlantic halibut	16.0
<u>Cod</u>	
Fresh or chilled:	
Whole, headless, or in pieces	12.0
Fillets:	18.0
Frozen:	
Whole, headless, or in pieces	12.0
Fillets	15.0 (e)

<u>TRADE DESCRIPTION</u>	<u>DUTY RATE (%)</u>
<u>Cod (cont.)</u>	
Dried, salted, or in brine	
Whole, headless, or in pieces	13.0 (f)
Fillets	20.0
<u>Alaska pollock</u>	
Fresh, chilled, or frozen	15.0
<u>Mackerel</u>	
Fresh or chilled:	
Whole, headless, or in pieces:	
February 15 - June 15	Free
June 16 - February 14	20.0
Frozen:	
Whole, headless, or in pieces:	
February 15 - June 15	Free
June 16 - February 14	20.0
Fillets	15.0
<u>Hake</u>	
Fresh or chilled	15.0 (g)
Frozen (including fillets)	15.0 (g)
<u>Livers and Roes</u>	
Fresh, chilled, or frozen	10.0
<u>Lobster</u>	
Live	8.0
Other:	
Whole	8.0
Other:	
Frozen	16.0
Other	20.0
<u>Crab</u>	
Of species <u>Paralithodes camchaticas</u> ,	
<u>Chionoecetes</u> spp., <u>Callinectes</u> <u>sapidus</u>	8.0
Other	15.0
<u>Shrimp and Prawns</u>	
Of the Pandalidae family	12.0
Of the genus <u>Crangon</u>	18.0
Other	18.0
<u>Oysters</u>	18.0
<u>Mussels</u>	10.0
<u>Squid</u>	
<u>Loligo</u> spp.	6.0
<u>Illex</u> spp.	8.0
<u>Todarodes</u> <u>sagittatus</u>	6.0
<u>Octopus</u>	8.0

a) Subject to compliance with the reference price. A countervailing tax is provided for in the case of non-compliance.

b) Duty exemption within the limits of an annual tariff quota of 34,000 tons to be granted by the competent authorities and subject to compliance with the reference price.

c) Duty exemption in respect of tunny intended for the canning industry, within the limits of an annual tariff quota of 30,000 tons to be granted by the competent authorities and subject to compliance with the reference price. Qualification for this quota is governed by conditions to be determined by the competent authorities.

d) Duty rate reduced to 6% in respect of piked dogfish (Squalus acanthias) within the limits of an annual tariff quota of 5,000 tons to be granted by the competent authorities.

e) Duty rate reduced to 8% for cod of the species Gadus morhua within the limits of an annual tariff quota of 10,000 tons to be granted by the competent authorities.

f) Duty exemption within the limits of an annual tariff quota of 25,000 tons to be granted by the competent authorities.

g) Duty rate reduced to 8% for silver hake (Merluccius bilinearis) within the limits of an annual tariff quota of 2,000 tons to be granted by the competent authorities.

Source: Official Journal of the European Communities
European Communities Commission, Luxembourg

APPENDIX VI

LIST OF AVAILABLE MARKET STUDIES

Available Market Studies

Several recent studies on the market for fishery products in the United Kingdom are available. These studies could be helpful in identifying export opportunities and developing marketing strategies.

- 1) Title: Product Group Report No. 44: Fish (1985)
From: Market Assessment Publications
2 Duncan Terrace
London I 8B2
United Kingdom
Cost: 150 Pounds Sterling (approximately \$194)
Subject: This is a report on the market for finfish products including a discussion of marketing trends.

- 2) Title: Wild and Farmed Fish and Shellfish Markets in Europe (1985)
From: Frost and Sullivan Inc.
Department R-1
106 Fulton Street
New York, NY 10038
Cost: \$1,675
Subject: This report analyzes market trends and opportunities for fish and shellfish in Europe.

- 3) Title: Fish Marketing in the U.K. (1985)
From: Professor Ian Goulding
Shellfield City Polytechnic
Sheffield, U.K.
Cost: \$2.00
Subject: This report analyzes market trends, improved marketing methods and processing technology.

In addition to these reports, the U.S. and Foreign Commercial Service offers three services which can assist an exporter in identifying and assessing markets. These services are:

- 1) Export Statistics Profiles (ESP) which feature market analysis and detailed statistical tables which examine the fishing industry's export sales and performance over the past five years. The cost is \$70.00 per ESP.

- 2) ESP Overview which contains three segments of the ESP: the "Export Market Brief", an "Export Market Potential Rating Chart", and a "Product Guide and Concordance". This overview provides information indicating country's potentials of buying U.S. seafood products. The cost is \$10.00 per overview.

- 3) International Marketing Information (IMI) which provides specialized market data for a given country. The cost is \$15.00 per IMI.

To obtain order forms or more information regarding these services, contact the following office:

U.S. Department of Commerce
Office of Information Product
Development and Distribution
P.O. Box 14207
Washington, D.C. 20044