

Considering the stringent sanitary inspections carried out by the Canadian government, Canadian exporters have not encountered any major difficulty in entering the Belgian market. At the same time, the Commission of the European Community is considering announcing that the Canadian inspection system is equivalent to that mentioned in the EC directives.

Customs clearing can be largely facilitated when shipments are accompanied by a "Certificate of Lot Inspection and Wholesomeness". This document was recognized by the Belgian government in 1979. If not accompanied by this certificate, shipments can be delayed for weeks in customs clearing, causing major inconveniences for customers or for the shipments if these concern fresh seafood. Therefore, Canadian exporters of mussels are known to import their products to Luxembourg, for immediate re-export thereafter, as handling of the goods there is generally somewhat faster.

The EC applies very stringent measures on the use of hormones in food. Both synthetic and organic hormones are strictly forbidden, yet up to now this has not affected Canadian seafood exports. However, if experiments with the breeding of temperature resistant fish species come to the production phase, exporters will have to check whether this would fall under the hormone policy of the EC.

The potential of gaining a major market share through the export of value-added fish products and prepared frozen seafood dishes has already been mentioned. While at the present time, fresh seafood dishes are often still prepared by fishmongers or at a delicatessen shop, without regular sanitary inspection, changing social structure and patterns are making the frozen fish market much more attractive.

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As has been mentioned, the Belgian market for fish and seafood products has recently become more volatile. This is not only due to the general feeling of uneasiness with exporters who found too few new market openings. Certain import companies had actually reached a virtual monopoly position with large food chains in Belgium. The most widely known such example is the Makro chain, where 95% of the fish for its seafood counter is provided by one single importing company: Atka from Londerzeel. Fortunately, purchasing managers have begun to realize the drawbacks of this situation, and have now started to visit the various food fairs in Europe in an attempt to attract new suppliers with a wider range of fish products. Some of the most widely known such food chains in Belgium are GB-Inno-BM, Delhaize-Lion, Colruyt, Makro, Nopri and Sarma.

There is, however, a major drawback to this system. As most of these larger food outlets face stiff competition from one another, their profit margins are determined by the rate of turnover they can achieve. Subsequently, their stocking facilities are rather limited, and deliveries have to follow the J.I.T. or Just In Time system. This problem can only be adequately addressed by exporting companies under certain circumstances:

- (1) if they can guarantee deliveries of less than full container quantities on a regular basis and with very short delays of delivery; and
- (2) if they offer a substantial product line of seafood, both in simple frozen and prepared form in order to be able to deliver in container quantities. Short delivery periods will prove to be of essential value to win food chains over from the competition.