

The better ones among them also supply local restaurants that have less access to large fresh fish ports in the neighbourhood. Generally these fishmongers offer an extensive variety of fresh fish, even in the more remote inland regions. Many of them visit the coastal fish ports of Oostende, Nieuwpoort or Zeebrugge almost daily in order to cater to the taste of their consumers.

Food chains and department stores have substantially increased their market share in the fresh seafood sector. Next to their frozen food counters, they have now opened fresh seafood counters with an extensive variety of fish and freshly prepared fish dishes or salads. Changes in social structure have greatly influenced the organization of the fish and seafood retail market. Consumers are increasingly limited to only one shopping day per week, usually Saturday, and tend to prefer the big food outlets for the sake of convenience.

These new seafood counters form a direct challenge to the traditional fishmongers. From the exporter's point of view, the food chains have become a major target market for their products. In order to capture even more of the traditional fishmongers' market, the purchasing managers of the big food chains are constantly looking for new varieties of fish from other countries.

Restaurants have become increasingly important in the seafood consumption pattern of the Belgian consumer. These restaurants range from the upscale to the economical. In 1988, fish consumption was still primarily restricted to home consumption, accounting for 60% of total consumption, and restaurant consumption only estimated at some 25%. At present, fish consumption in restaurants has increased to at least 35% at the expense of the fish consumption at home.

A traditional 15% of the consumption of fish still takes place in various kinds of institutions: schools, hospitals, company restaurants etc. Institutions are increasingly aware of their role in promoting the nutritional value of fish in a balanced diet and have therefore started offering fish more frequently on the menu.

BELGIAN SEAFOOD TURNOVER

An examination of statistics on the Belgian fish and seafood market illustrates an industry that has fared well in spite of a general economic downturn. In 1991, the Belgian seafood market experienced a decline in its volume turnover for the first time since 1978. In spite of this decrease, however, in value terms seafood production increased more than 8%. This can be partly explained by a shift in the habits of Belgian consumers. In recent years there has been a shift in consumer preferences to more expensive varieties of seafood, as well as an increase in restaurant consumption.

Belgian landings today account for only a minor part of the domestic fish and seafood supply: only 14.42% of the value turnover and 19.35% of the volume turnover is of national origin. Imports continue to increase in importance, in part because Belgian landings are greatly influenced by the yearly fishing quotas allotted by the European Community.

Even with the increasing importance of imports, the Canadian share faced tough competition in 1991 from other countries, and its market share actually declined. There exists no valid reason, however, for the Canadian market share to decline. Looking at the trade and market data available, there still exists a broad window of opportunity for Canadian exporters. By taking up the challenge, exporters could substantially increase their market share.