

FRANCE

SUPPLY AND CONSUMPTION

The 56.5 million people of France consumed 1.2 million tonnes of fisheries products in 1989. Estimated per capita consumption was 14.75 kilos of fresh fish, crustaceans and shellfish; 3.43 kilos of frozen fish and crustaceans; and 3.55 kilos of canned fish and crustaceans. The consumption of fish is a long standing but on-going tradition as most cities are in close proximity to ports. In 1990, France imported Cdn\$2.52 billion worth of fish products, including \$80.8 million from Canada. Canada ranks 10th among France's suppliers of fishery products. France represents the largest European market for salmon and smoked salmon.

HEALTH REGULATIONS

Salmon products entering the French market must be accompanied by a sanitary certificate (known officially as a "certificat de salubrite") made out by an inspector from Fisheries and Oceans Canada. Models of such sanitary certificates have been provided by the French authorities. On the certificates, the products must be designated by their Latin and official French names, and their place of origin must be indicated. All fish products are subject to inspection by veterinarians and by Customs and Fraud Prevention Service personnel when entering the country (see also Guidelines for Canadian Fish Exporters to France, EAITC/TAA 1992).

TARIFFS

Customs duties for salmon products entering the French market are: fresh (2 percent); frozen (2 percent); smoked (13 percent); and canned (5.5 percent).

POST PROPOSALS

Attempts have been made by Canadian salmon exporters to ship fresh salmon, mainly in the summer, but the post does not feel this sector will expand in the future. Total imports of frozen salmon increased in 1990, but Canada's market share is steadily shrinking. Most frozen product had previously been allocated to the smoking sector, but the post feels more could be marketed in France for processing into prepared dishes and for sale to supermarkets. The most desirable type of salmon for smoking purposes is troll caught coho, shipped cleaned with head removed, in cartons of 50, 100 or 200 pounds. Weight categories in pounds are 2/4, 3/5, 4/6, 6/9, 9/12 and 12/up. Other end-uses for French importers include steaks and fillets. Smoked salmon could be expanded to the French market if the price remains at a competitive level. Smoking techniques in France (cold smoking) must be taken into account by Canadian exporters, whether to make the same product or to market a new one (hot-smoked salmon, salmon jerky. Canned salmon exporters must realize the market is based on price in a relatively small consumer market, the product is not well known, and not all supermarkets carry the product.