

	1988	1989	1990	1990 AVE CIF PRICES	
				Lire/kg	\$/kg
<u>SQUID, ILLEX SPP, FROZEN</u>					
(0307.99.110)	<u>8923</u>	<u>8706</u>	<u>7798</u>		
(8% tariff)					
<u>CRAB, CANNED</u>					
(1605.10.000)	<u>523</u>	<u>423</u>	<u>552</u>		
Canada			4	18,000	17.41
(16% tariff)					

Source: ISTAT. The Canadian dollar average exchange rate in 1988 was Lire 1046, in 1989 Lire 1130, and in 1990 Lire 1034.

COD

With very little local production, the Italian cod market is dominated by imports, which in 1990 amounted to a total of over 30,000 tonnes. The major portion of this consisted of preserved codfish, totalling 22,056 t., of which 3,955 t. of stockfish, 4,526 t. of dried and salted, 9,219 t. of non-dried, salted or in brine, and 4,356 t. of salted cod fillets. Imports of frozen cod, on the other hand, amounted to only 8,926 t, of which 8,926 t of whole fish and 2,960 t of fillets.

Frozen cod is a staple of the frozen fish product industry, which has grown slowly but steadily over the past generation. Frozen cod consumption is judged to be about evenly split between the institutional market and the consumer-pack sector, and preferred product forms are either H & G whole and fillets. Other more specialized "surgelati" products are often imported under co-packing arrangements with major Italian distributors.

As opposed to the frozen product, dried and/or salted cod has been known on the Italian market for centuries and, although demand is in slight decline, the product continues to hold place in the Italian dietary tradition. There is no local production, and the major suppliers are Norway, Iceland, Faroes Islands, Spain, Denmark and Canada. Quality is of utmost importance here as well, important aspects being consistent fish size, smoothness of split, consistent moisture content, firmness and whiteness of flesh, absence of blood spots, parasites, etc. Given the steady decline in consumption, quality considerations are essential in maintaining or increasing share in this still important market. Aside from the somewhat unique traditional market for Gaspé cure, there is a general preference for choice medium and small, both white and black wings, of moisture content equivalent to the