

COMPETITION

EC countries supply some 70% of the total imports of fish to the Belgian market. Imports come primarily from the Netherlands, Denmark and France. Each of these countries has their own specialized fish resources and often breeding grounds as well. The majority of EC imports of fish and seafood consist of fresh or chilled fish, and mollusc.

The Netherlands is Belgium's biggest trading partner in the EC for fish, and supplies several species to the Belgian market. Their exports to Belgium are dominated by the trading of mussels, which are generally bred on special sandbanks. Originally, this was strictly done on the sandbanks in Zeeland, but has now shifted largely to the Wadden in the north of the country. Some three months before the actual harvesting, the mussels are transported down to the Oosterschelde. The Dutch mussel remains the favourite of Belgian consumers, partly because it is very resistant with a high meat percentage. The season begins approximately in July or August, and lasts until November or December. However, since in recent years the price of the Dutch mussel has increased dramatically, several producers have started mixing Dutch and other mussels together. For this reason Belgian importers have begun to look for other sources, in order to offer a variety of mussels and prolong the season that mussels can be offered to the consumer. Canadian mussels were introduced, and have already been widely acclaimed.

The second major fish trading partner for Belgium in the EC is Denmark. This country is most widely acclaimed for its exports of cod, which is rich in flavour and superb in texture. At the same time, Denmark also supplies a number of other flatfish and pelagic species such as eel, herring, mussels and trout. Part of the reason for the Danish success in exporting fish to Belgium has to do with the increasing concern over the environmental conditions of the North Sea. Since the general belief is that Scandinavian waters are far less polluted, the Belgian consumer tends to be more inclined to purchase fish from this region (i.e. Danish fresh fish).

NORWAY

Norway is Belgium's major trading partner for salmon, with a 1991 volume turnover of exports of 46,278 tons, and a value turnover of 33,637,210 Cdn\$. The majority of this salmon is farmed salmon of the Atlantic species, with several particular characteristics which make it highly desirable. Norwegian salmon is known to have a solid meat structure and predictable taste. Perhaps even more importantly, regular production can be guaranteed and there is always the possibility of a swift reaction on the part of producers to the seasonal peaks in the demand for salmon, such as the end-of-the-year holiday season. Finally, Norwegian salmon producers are ready to supply less than full container quantities on a regular basis to small processing firms in Belgium.

Having said this however, it must be pointed out that farmed Norwegian salmon also has certain drawbacks, which in turn opens up market opportunities for other salmon exporting countries. Farmed salmon has a less distinctive pink or reddish colour, and it is known that Belgian consumers prefer the colour to be much stronger. Unlike wild salmon, farmed salmon has a far less strong taste, affecting both its use in the smoking process and in preparation of fresh salmon dishes. Finally, there is the problem of the increasing unreliability of the price of Norwegian salmon, which in recent months has increased dramatically. As a result, purchasing managers of both food and processing chains have been looking for substitutes to Norwegian salmon from other countries.