POST OBSERVATIONS

France's own fisheries do not produce enough to supply the market. Import and export trade in both fresh and frozen fish products is growing steadily; imports have remained stable in recent years. Demand is especially steady for white fish, especially cod, flatfish and crustaceans, and is rising for products which are seldom if ever landed in France, a fact which aggravates the foreign trade deficit. With C$3.5 billion in imports and only C$1.1 billion in exports, France's foreign trade in fish products experienced a deficit of C$2.4 billion in 1992.

France is Canada's largest European customer. But among France's foreign suppliers Canada ranks only tenth, behind the UK, Norway, Denmark, the Netherlands, Iceland, Ivory Coast, the USA, Germany and Senegal. Only 2.62% of all fish products imported into France in 1992 came from Canada. Canada is at a disadvantage vis-à-vis other suppliers, except the USA, in terms of import duties and transportation costs. As noted above, there are no tariff barriers within the EU. Preferential duties exist for the countries of Africa, Norway, Greenland, the Faroe Islands and Iceland.

CONSUMPTION
The 57 million people of France consumed 1,302,800 tonnes of seafood in 1992. In 1987, estimated per capita consumption was 15.41 kg of fresh fish, crustaceans and shellfish, 4.18 kg of frozen fish and crustaceans, and 4.28 kg of canned fish and crustaceans. In France the consumption of fish is an ancient and ongoing tradition, for the cities are not very far from the ports. Almost all edible species of fish landed off France's shores are consumed domestically.

FRESH PRODUCTS
Much of France's production of fish and crustaceans is sold fresh. In the ports, catches are sold at auction at locations known as "criées." The products are then shipped by truck either to the final buyers (fish markets or processors) or to the Rungis market, near Paris, for resale.

PROCESSING SECTOR
The more traditional fish-canning industry, with its fairly uncomplicated products (such as sardines, tuna, mackerel fillets), is losing ground. The number of canneries has greatly declined, and the surviving firms are able to keep going only because of the subsidiaries in Morocco or Tunisia, where production costs are lower. An increasing range and variety of prepared dishes have become available in recent years.

The suspicion with which frozen products were regarded a few years ago has largely disappeared. The quality of the products available on the market is very high. In 1992, 35% of French households, and 55% of four-person households were equipped with microwave ovens; this trend is making it easier to sell frozen products.

At the same time, because the French have adopted frozen products later than North Americans, and because they have a strong attachment to fresh products - freshness being regarded as a synonym for quality - the development of new technologies has given rise to fresh prepared dishes alongside the traditional frozen and canned prepared dishes that were already available. Consumption of smoked products, most notably smoked salmon, is increasing year by year.