

Integrated fishing companies can stabilize their supply of raw material, to a certain extent, through the use of their own licences plus the option of increasing their quota by buying additional licences. They also augment their supply of raw material by bidding for the catches of the independents on the open market. In some instances, independent fishermen enter into agreements to sell all of their catch on a regular basis to one or two of the principal processors. Usually some formula is set out in the agreement whereby the independent can be certain of a fixed price on a sliding scale depending on the state of the total market. These "loyalty" agreements help reduce the uncertainty for both the independents and the major suppliers, who are concerned about having adequate supplies.

In addition to having well developed relationships with the fish processors, the independent fishermen also do some processing and marketing. Many licence holders ship fresh fish, with minimal amount of processing, direct to the U.S. market. Also, a substantial proportion of the 15% of the total Ontario harvest which is marketed in Canada is sold directly to Ontario consumers by the fishermen at lakeside stalls.

In summary, it should be emphasized that the fishing operations in the Ontario Region are greatly diverse in size and type of activities. While some may handle mostly fresh fish, others engage in substantial processing operations which range from smoking to breasting. The marketing of fresh fish takes place between the spring and autumn, while the marketing of processed frozen products takes place on a year round basis although it also decreases during the winter as raw material availability declines.

of the fact that data is reported in thousands of pounds.

MARKETS FOR FRESH FISH

Market	1977/78	1978/79	1979/80
U.S.A.	1,000	1,000	1,000
Japan	1,000	1,000	1,000
Finland	1,000	1,000	1,000
France	1,000	1,000	1,000
Germany	1,000	1,000	1,000
Switzerland	1,000	1,000	1,000
Sweden	1,000	1,000	1,000
England	1,000	1,000	1,000
Other	1,000	1,000	1,000
Total Exports	10,000	10,000	10,000
Canada	1,000	1,000	1,000

(a) These figures are based on a sample survey of the fish processors in the Ontario fish industry.

Sources: 1) Freshwater Fish Marketing Commission, Annual Report 1977-78.  
 2) Statistics Canada, Special Report on the Fish Industry, prepared by provincial fishing organizations.