

associated hotel and restaurant trade has not lived up to expectations, and does not appear to present significant opportunities to Canadian suppliers.

IMPORT MARKET SIZE (Post's estimate)	CDN SHARE (Post's estimate)	
Cdn\$ millions	Cdn\$ millions	Percentage
1986: \$70	\$0.0	(0.0%)
1987: \$70	\$0.0	(0.0%)
1988: \$75	\$0.1	(0.1%)

Imports are predominantly of frozen pelagic products; three species, horse mackerel, mackerel and sardine, accounted for over 78% of imports in 1986. Total imports of frozen fish were 107,000 tonnes in 1986 and 104,000 tonnes in 1987.

Limited quantities of freshwater fish are imported from neighbouring countries.

MAJOR COMPETITORS (by share, post's est.): Mauritania (30%), Netherlands (29%), USSR (19%), Senegal (14%), others (8%).

Comments on competitors:

Mauritania is a point of landing for foreign fishing vessels, primarily East European.

Similarly, Senegal is point of landing for Polish, Soviet, East German trawlers. Senegal participates in a free trade arrangement with Ivory Coast, Burkina Faso, Niger, Mali and Mauritania.

Netherlands has an active mackerel fishery ranging as far as the East Coast of North America. The Netherlands' share of imports may also reflect the country's role as point of shipment, as opposed to point of origin.

EEC members have certain advantages in this market due to Ivorian licensing and quota arrangements. European firms have established relationships in Côte d'Ivoire, and many have offices there. France, in particular, has a special relationship as the former colonial power and present guarantor of the CFA franc. In addition, there is regularly scheduled shipping between Western Europe and Côte d'Ivoire.

West Europeans harvest with large freezer vessels, supplying product which is less expensive and has better quality than mackerel caught by small nearshore vessels.

USSR and other East Bloc nations have traditionally fished large quantities of pelagic fish off of West and Southwest Africa, and can offload their catches with little effort in Côte d'Ivoire and other members of the Economic Community of West Africa (CEAO). Soviet efforts to maximize hard currency earnings have, on occasion, been associated with allegations that Soviet sales in Abidjan have been at "dumped" prices.