

Promotion towards Belgian retailers can also be done through the specialized magazine *Visaktua*. This magazine concentrates regularly on the introduction of new species, and frequently features interesting issues about new exporting countries in the Belgian market. More information about the fish industry and fish retailing in Belgium can be obtained from the various organizations that readily assist new companies in finding their way around. Among these are the National Federation for Fish Retailers, the National Organization of Fishmongers and the Professional Union of Fish Distributors.

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Given the propensity of Belgians to be major fish consumers, it was generally considered that prices had little effect upon Belgian seafood consumption. Indeed, it would seem that up until 1991 the latter was true. Nevertheless, the behaviour of prices in the mussel market in 1992 has changed this belief. There would appear to be a direct positive relationship between the price of mussels and the consumption of them by Belgian consumers, as mussel consumption has decreased dramatically as prices have risen. With mussel prices for 1992 increasing even further, importers and purchasers alike have been scrambling to find new species to introduce to Belgian consumers. This could represent a prime opportunity for Canadian mussel exporters to enter the Belgian market.

At the same time it is apparent that the general economic slowdown that began in 1991 has altered the consumption habits of Belgian consumers. While they still spend a substantial proportion of their food budget on fish, they are beginning to switch from the expensive traditional species to newer and cheaper fish, or even to frozen fish. Traditional species now tend to appear on the shopping list for the holiday season or strictly on the menu in the restaurants.

It is important to be aware of the fact that the European Community has a whole range of tariffs applicable to the import of seafood. Tariffs differ between species, and can also differ between peak and off-peak seasons. In general, however, these tariffs range from about 8% up to as much as 25%. Generally fresh or frozen unprocessed fish has the lowest tariffs, processed fish is to be found on the mid range of the tariff list and value-added processed seafood can be found in the highest tariff range. However, it is very important when entering the Belgian market to understand the only moderate value of the applicable tariff. This is because Belgium is a country which is known for its extensive distribution scheme. Distribution is generally described as an extensive pyramid, with a large number of "middle men". Although the tariff rate is lower for unprocessed fisheries products, the number of middle transactions carried out - e.g. from exporter to importer, to processing company, to wholesaler and finally to retailer - adds a substantial value to the price of the original product. Entering at a much higher level in the distribution pyramid - e.g. directly to the big retail outlets - definitely offsets the higher tariff. As larger Canadian companies can realize better economies of scale than their Belgian counterparts, their price, even with the relative high tariff imposed on it, will still offset the price of the same product processed in Belgium.

Nevertheless, Canadian exporters should constantly update their information on applicable tariffs through the EC Commission mission in Canada, or through the external affairs office in Ottawa, which keeps track of all the latest tariffs applicable. Tariffs tend to change quickly, and for the moment are not yet agreed upon for 1993. But Canadian exporters should realize that the tariffs imposed by the EC on seafood are not the large trade barrier they are sometimes believed to be. Finally, it is important to remember that all fish sold in Belgium is subject to VAT. For most food products, VAT is 6%, but for luxury food items this can also be 12 or even 19.5%.