

internationally. The United Nations Development Programme (UNDP) is currently involved in a four-year rural aquaculture and freshwater fisheries project in Côte d'Ivoire.

Processing Sector: There is a major tuna canning industry in Côte d'Ivoire. Two companies, Pêche et Froid and SCODI, are active. Together, they exported 23,800 tonnes of canned product in 1986. France absorbed 83% of output, and the United Kingdom 13%. The balance of exports went to other Western European markets.

As the great majority of fish consumed domestically is in smoked form, fish smoking is a thriving cottage industry in Côte d'Ivoire.

<u>Statistics:</u>	1985	1986
Total Landings (tonnes)	102,204	97,174
Total Imports (tonnes)	89,730	106,924
Total Exports (tonnes)		9
Domestic Disappearance (tonnes)	191,934	204,093
" " per capita (kg)	20	21

(Note: Above figures exclude tuna.)

COMMENTS AND OBSERVATIONS ON MARKET

General: For the foreseeable future, Côte d'Ivoire will remain dependent on imports to meet a major proportion of national demand for fish products. Domestic production of about 100,000 tonnes in 1986 provided for approximately half of annual consumption in the neighbourhood of 200,000 tonnes. Fish provides 75% of animal protein for human consumption in Côte d'Ivoire.

Per capita annual consumption ran as high as 30 kg by 1980, though it had declined to just over 20 kg by 1986 due to general economic decline and belt-tightening.

With little consumer refrigeration, 90% of imported frozen fish is consumed in smoked form. Home supplies are purchased in village markets from local women who act as the principal retailers. These locally influential retailers purchase frozen fish in the round from importers in Abidjan or from frozen storage in various cities throughout the country. This portion of the market provides the best export opportunity for Canadian fish exporters.

In addition to the traditional market, a limited "luxury" market and a very restricted tourist market exist in Côte d'Ivoire. An elite of French, Lebanese and wealthy Ivorians consume higher-value imported products retailed at local "supermarkets". These products are imported primarily from established sources in France.

Tourist arrivals (principally from France) are limited in volume and concentrated around winter and spring holidays. The