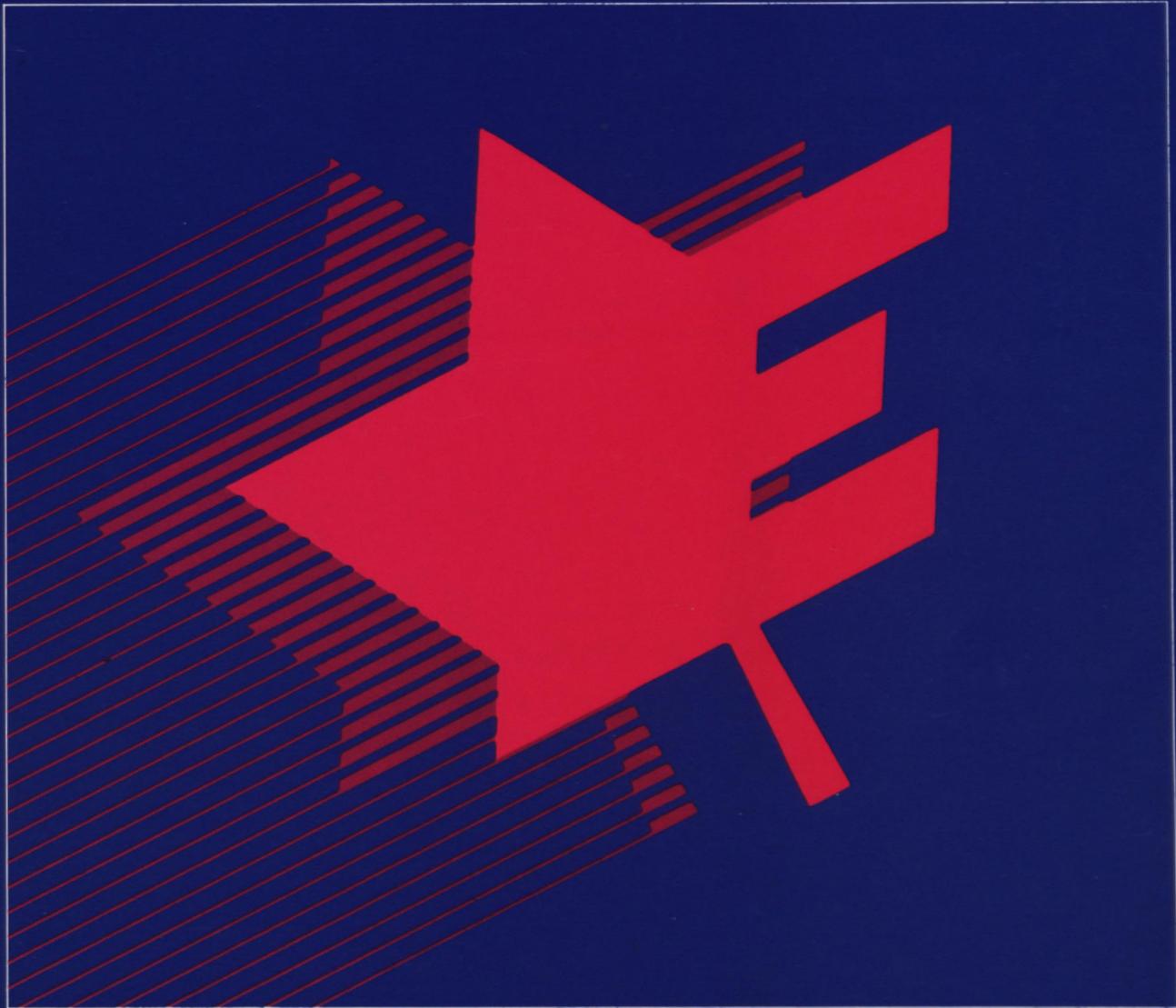


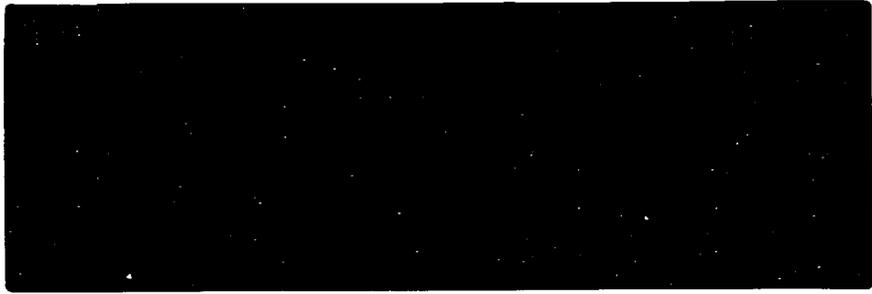
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DRAFT

FEDERAL REPUBLIC OF GERMANY
GUIDELINES FOR CANADIAN
FISH EXPORTERS
1988/89

Dept. of External Affairs
Min. des Affaires extérieures

AUG 17 1990

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Prepared by: Robert Steinbock
Trade Commissioner
Fisheries Division
International Trade
Development Branch
Department of External
Affairs, OTTAWA
February 1989

43-256-775

READERS WHO WOULD LIKE MORE INFORMATION ON THE EXPORT OPPORTUNITIES IN THE FEDERAL OF GERMANY SHOULD CONTACT TRADE COMMISSIONERS AT THE NEAREST INTERNATIONAL TRADE CENTRE OR AT THE WESTERN EUROPE TRADE AND INVESTMENT DEVELOPMENT DIVISION OR FISHERIES DIVISION IN OTTAWA.

IF YOU ARE "EXPORT READY" AND WISH TO TAKE ADVANTAGE OF THESE OPPORTUNITIES, YOU SHOULD LET THE CANADIAN CONSULATE IN DUSSELDORF KNOW OF YOUR EXPORT CAPABILITIES, INDICATING YOUR WILLINGNESS TO RESPOND TO BUYER INQUIRIES.

FOR YOUR CONVENIENCE, CONTACT INFORMATION FOR THE INTERNATIONAL TRADE CENTRES IS APPENDED TO THIS REPORT.

INTRODUCTION

The Canadian Consulate General in Dusseldorf, Federal Republic of Germany, in its 1988/89 post plan, identified "Fish, Shellfish and Other Fish Products" as a priority subsector for market development activities by the post.

The Post's 1988/89 plan is set out in Appendix 1 to this report. The report elaborates on the plan and provides supplemental information on the West German market for fish products.

This report is intended:

- to make Canadian fish exporters aware of the export market opportunities for fish in West Germany;
- to provide exporters with sufficient information to assess whether further exploration of the market opportunities is warranted;
- to facilitate contacts with West German fish buyers;
- to provide helpful information to Canadian fish exporters, and to make them aware of the services provided and activities undertaken in support of Canadian export development by trade officers in the Canadian Consulate General in Dusseldorf;
- to promote discussion of Canadian fish export interests, priorities, competitive challenges and marketing efforts in West Germany.

Care has been taken to assure the accuracy of the information in this report at the time of preparation. However, prudent exporters are advised to check all relevant details with prospective buyers and to adhere to the specifications set by West German importers and authorities.

We want to hear about your efforts to develop the West German market for fish and fish products, both successful and unsuccessful. If we have missed important information, please let us know.

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POST: Dusseldorf

LAST UPDATED: January, 1989

COUNTRY: Germany, Federal Republic of Germany

FEDERAL REPUBLIC OF GERMANY, THE MARKET IN BRIEF: The Federal Republic of Germany is the largest and most affluent Member State of the European Economic Community. Germany's imports, currently expanding at 6% a year, are relatively evenly distributed throughout the various sectors, and primary goods play a prominent role in imports. Food and beverages remain the largest single import sector, accounting for about 14% by value. Per capita consumption of fishery products is relatively high and reached 13.2 kg/year in 1987. West Germany is also largely dependent on imports to meet the growing demand for seafood. Fully two-thirds of all seafood is imported. Canada's share of this market has remained persistently low despite record exports to the European Community as a whole in 1987. Exports to West Germany were a relatively modest \$29.9 million, only 7 percent of Canadian seafood exports to the European Community. Currently Canadian fish exports to West Germany consist of a number of commodities for further processing - frozen herring, frozen salmon and fish roes as well as products for direct sale at the retail level - live lobster, frozen herring fillets and sole fillets. While some of these products face relatively high tariffs, good sales prospects exist with favourable exchange rates and market promotion.

FISHERIES CONTACT(S) AT POST: Mr. Dennis S.M. Baker, Consul General.
Mr. Christopher Maclean, Commercial Officer, Canadian Consulate General,
Immermann Hoff, Immermannstrasse 65D, 4000 Dusseldorf 1, Federal Republic of
Germany, Telephone: (011-49-211) 35-34-71, Telex: (Destination Code 41)
8587144 (DMCN D), Fax: None.

EXTERNAL AFFAIRS HEADQUARTERS CONTACTS: TAF (Fisheries Division)
Bob Steinbock - 996-3558. RWT (Western Europe Trade Division) - David Cohen
- 996-3774.

REPRESENTATIVE OFFICE IN CANADA:

Embassy of the Federal Republic of Germany
1 Waverley Street
Ottawa, Ontario
K2P 0T8
Tel: (613) 232-1101

- Canadian German Chamber of Industry & Commerce Inc.
Head Office: 480 University Ave., #1410, Toronto, Ont. M5G 1X2
(416) 598-3355 - FAX: 598-1840
Executive Director, V. Harnack
- 1010 Sherbrooke St. W., Montreal, Quebec H3A 2R7, (514) 844-1473
- #1330, 10060 Jasper Ave., Edmonton, Alberta T5J 3R8, (403)
420-6611

COUNTRY DATA: Population 60,980,202 (July 1988)

Area: 248,580 km².

Pop. Density: 248 persons per square km.

Major cities: Bonn, Berlin, Bremen, Cologne, Dortmund, Dusseldorf, Essen, Frankfurt, Hamburg, Hanover, Kiel, Main/Wiesbaden, Mannheim, Ludwigshafen, Munich, Nuremberg, Saarbrucken, Stuttgart.

GNP: US\$908.3 billion

GNP per capita: US\$14,890

Economy: Free Market Economy

Currency: Deutsche Mark (DM)

Weights and Measures: Metric System. There are no unusual measures or terminology, except for certain archaic terms still occasionally found in agriculture.

Language: German

Religion: 45% Roman Catholic, 44% Protestant, 11% Other.

Constitutional system: Basic Law (Grundgesetz) of Federal Republic of Germany. May 23, 1949 - Provisional Constitution. Government is Federal Republic.

HIGHLIGHTS OF THE DOMESTIC FISHERY

Resources: In 1987, the fishing quotas of the FRG amounted to 370,000 tonnes (204,000 tonnes in EEC waters and 166,000 tonnes in external waters). Deep-sea fisheries received 257,000 tonnes of the overall quota (of which 196,000 tonnes were accounted for by traditional species) and cutter fisheries received 113,000 tonnes (of which 106,000 tonnes were accounted for by traditional species). A considerable part of the quotas could not be caught due to particular biological or hydrological reasons, to an uneconomic situation as well as to a lack of abundance of fish resulting from overfishing.

At the end of 1987, the FRG large deep-sea fisheries consisted of 17 units with a total of about 25,000 GRT, of which 5 are freezers, 9 wetfish trawlers and 3 Dutch herring freezers flying the German flag. The cutter fleet, with about 650 units and approximately 24,000 GRT, remained unchanged from 1986.

Management: The EC Fisheries Council takes decisions on behalf of EC Member States on fisheries management measures for Community, third country and international waters. 1987 Total Allowable Catches (TAC's) and quotas reflect the Community's ongoing policy of ensuring as far as possible the stability of fishing activities while taking into account scientists' advice

on stock conservation. Tables show the total quotas for all stocks (main species/areas) allocated to each Member State in 1987 in the zones covered by Community regulations.

The Community negotiated bilateral, trilateral and multilateral fishing arrangements for 1987 with several third countries:

- Norway and Sweden
- Faroe Islands
- Norway and Sweden - Skagerrak and Kattegat
- Greenland
- Morocco
- Sao Tomé and Príncipe
- Angola, Mauritania, Dominica and the Comoros

Multilateral Arrangements:

- Northwest Atlantic Fisheries Organization (NAFO)
- Convention on Future Multilateral Cooperation on North-Eastern Atlantic Fisheries (NEAFC)
- International Baltic Sea Fishery Convention (IBSFC)
- North Atlantic Salmon Conservation Organization (NASCO)
- Convention for the Conservation of Antarctic Marine Living Resources (CCAMLR)
- FAO Committee on Fisheries
- ICES

Observer Status at Following Meetings in 1987:

- IWC (*International Whaling Commission*)
- ICCAT (*International Commission for the Conservation of Atlantic Tunas*)
- WECAFC (*Western Central Atlantic Fishery Commission*)
- ICSEAF (*International Commission for South-East Atlantic Fisheries*)

Landings: 179,000 M.T. (1987)

Aquaculture: 41,200 M.T. (1985): Trout - 14,000 M.T., Carp - 6,200 M.T., Oysters - 24 M.T., Mussels - 21,000 M.T.

Processing Sector:

Statistics: (FAO) (M.T. live weight)

	1982 - 1984	
	<u>AVERAGE</u>	
Total Landings	315,390	
Non-food Uses	96,782	
Imports	577,305	
Exports	226,708	
Domestic Disappearance	571,873	
Population (1000)	61,412	
Domestic Disappearance per capita (kg)	9.3	13.2 (1987)

COMMENTS AND OBSERVATIONS ON MARKET

General:

IMPORT MARKET SIZE (Post's estimate) CDN SHARE (Post's estimate)

1987: \$1179.00 mm	\$31.00 mm (2.6%)
1988: \$1162.00 mm	\$20.00 mm (1.7%)
1989: \$1055.00 mm	\$25.00 mm (2.4%)

CUMULATIVE 3-YEAR EXPORT POTENTIAL (Post's estimate): \$30-60 mm

MAJOR COMPETITORS (by share, post's est.): EEC - 60%, other West Europe (EFTA Countries) - 35%, Other Countries - 5%

Comments on competitors: Denmark and Netherlands are major herring suppliers from the EEC. Norway, Iceland, Sweden are major suppliers from EFTA Countries.

CURRENT STATUS OF CDN EXPORTS, POST'S ASSESSMENT: Canadian Market Share declining.

LEADING CDN EXPORTS, BY SPECIES/PRODUCT (Statistics Canada figures, value in Cdn\$ thousands, volume in tonnes)

<u>SPECIES/PRODUCT</u>	1986		1987	
	\$000	vol	\$000	vol
Lobster, live	3567	233	5583	358
Fish, nes, roe	2066	424	4060	680
Salmon, chum, frozen whole or dressed	2533	579	3451	653
Herring, frozen whole or dressed	1265	2083	2889	3638
Sauger fillet, frozen	1595	214	2424	254
Salmon, spring, frozen whole or dressed	1073	153	1609	181
Sea fish, nes, frozen whole or dressed	1372	283	1279	249
Herring, fillets, frozen	1521	2071	1201	1362
Sole, flounder fillets, frozen	601	86	1157	142
TOTAL	\$24,772	7520	\$29,931	8973

HISTORIC CANADIAN EXPORTS: Herring (various product forms) mackerel, cod, salmon, eels.

POST NOTES GOOD PROSPECTS FOR FOLLOWING PRODUCTS: Live/frozen lobster; shrimp; smoked salmon; frozen salmon; salmon roe; canned salmon; cod.

OTHER PROSPECTS: Freshwater fish, herring, mackerel, dogfish, snow crab, surf clams, oysters, monkfish tails, fresh halibut, pike perch, surimi products, salmon paté.

NEGATIVE PROSPECTS: Salted Fish.

ACCESS CONDITIONS:

PRICE AND TERMS: Quotes are preferred in CIF.

CREDIT: (including EDC status): N/A.

TARIFFS: See EEC TARIFFS and Tariff Rate Quotas (as of January 1989) in Appendix 2.

TRANSPORT: West Germany's transportation network is very sophisticated and goods can be taken in numerous different ways such as: via Frankfurt Airport; through the seaports of Hamburg, Bremen and Bremerhaven, which all offer freeport facilities; by river, especially the Rhine (via Rotterdam) and the Danube; across Germany on the Autobahnen and the Federal Railway.

Marine: The waterways of West Germany are heavily used for bulk goods and carry almost a quarter of all German freight. The Rhine river carries over 60% of all German waterborne traffic and it may soon be linked to Germany's other main water conduit, the Danube. The Europa project, scheduled for completion in 1989 or 1990, will bridge the gap between these two great rivers, linking the North Sea to the Black Sea.

There are regular cargo shipments to Europe from Halifax and Montreal and refrigerated container service is available for fish and seafood exports.

Air: Frankfurt's international airport, the world's largest cargo airport outside the USA, is a center of traffic in Europe. Most airlines operate services to Germany.

Land: Railroads have track totalling 31,800 km. Carrying 36% by weight of all German freight, the state-owned rail network retains the edge over road-haulage for long distance freight. A vast quantity of track was destroyed in the war, encouraging extensive modernization, and 41% of the network is now electrified. Recent investment has focussed on high speed and frequent freight service throughout the country, while other freight innovations include extensive container facilities and "piggyback" traffic.

Highways total 466,305 km. Road haulage, which accounts for 37% of German freight traffic, is in the hands of numerous private companies, but is subject to very strict regulations and tariffs, calibrated by the weight and distance (the RKT). The basic modernization of the Autobahn network is largely complete. However Germany's roads are exceptionally crowded and the accident rate is high.

Warehousing: Warehousing goods in Germany for an agent to draw on at will is a strong selling point.

Warehoused goods can remain the property of the exporter until the agent withdraws them. In government-run bonded warehouses, no import duty or tax needs to be paid until the goods are actually withdrawn; on goods stored in private open warehouses, taxes and duties must already have been paid.

Distribution: There is no single all-embracing distribution system in Germany, and the main offices for even the large chains of wholesalers and retailers are scattered across the country. An agent thus may be useful depending on the type of product. However, the high proportion of imported goods sold means that even the smallest retailers are often familiar with import procedures and can offer advice.

Over 75% of all trade purchases in Germany is attributable to the "ten" largest "umbrella" organizations, often combining retailing and wholesaling functions. Despite this concentration of buying power, exporters may find it necessary to deal with many local representatives.

See section below "TIPS ON APPROACHING THE MARKET" - Using an agent.

Customs Clearance: Goods arriving in Germany must be presented by the carrier to the Customs office. A special presentation list is required only in postal traffic and in such cases where customs clearance does not follow immediately. Senders' declarations can serve as a presentation list as prescribed in international goods traffic. If intended to be cleared through customs at the port of entry, an application and a special customs declaration has to be filed, either by the carrier or by the buyer or the recipient of the merchandise, at the time the customs declaration is made. Application must be made within a period not to exceed 45 days from the date of presentation if the goods arrive by sea, 15 days if other means. Goods intended to be cleared at another place within the country remain under customs bond while in transit. Goods not declared within the prescribed periods are taken under official custody and held pending declaration, at the expense and the risk of the interested parties. Goods may be examined by the importer before being cleared. It is our understanding that the German

Bureau of Customs now permits correction of errors in imports entries without filing a formal protest, which broadens the scope of errors subject to correction.

LICENSING: It is advisable to consult a lawyer before entering into any licence agreement; deals may for instance run into problems with either EC or West German anti-cartel law.

There are two principal types of licence in Germany: the simple and the exclusive. With an exclusive licence, the licensee can only grant one licence in any area; with a simple licence, any number can be granted.

INSPECTIONS: Enforcement of the German food law, and consequently both the taking of samples of foodstuffs and the performance of chemical analyses on them, is entirely in the hands of the 11 German states. Each individual state has developed its own administrative orders.

Special regulations govern aflatoxins in foodstuffs. Regarding the maximum level of mercury in fish, crustacea and molluscs, the FRG prohibits the circulation of fish foods for consumption with a mercury content of more than 1 ppm.

Regulations over levels of Nematodes

Draft regulations to set the maximum permitted levels of nematodes in fish sold to consumers have been prepared at both the national and Community level. Contrary to earlier expectations, EC legislation has still not been implemented and it remains open as to what will eventually be passed.

The German draft legislation, although not yet in force, poses some potential problems in the view of the German fish association. Both the Danes and the Norwegians have made interventions in Bonn that they could not guarantee the low level of nematodes required in these regulations (not more than one nematode per kilo as measured by the light table method). It is believed that they have proposed a maximum level of three nematodes per kilo.

Although the German trade can live with the proposed levels, they are worried about how the various veterinary services will actually carry out the testing. The trade feels that there is a wide latitude and that a situation could result where a shipment is certified at one level only to have tests by another method make it unacceptable. Probably only a legal decision will clarify this once regulations are in place.

Voluntary Nematode testing for imports from Canada

The present system of certification by Fisheries and Oceans works very well and is perfectly satisfactory to the German trade. With an eye to future demands, however, importers are now asking their suppliers to inspect the fish for worms and supply the documentation to the importer. This is not given to their customers but remains on file in case of any dispute.

The Fish Association feels that this is a responsible precautionary measure, not only in view of impending nematode legislation but also because of new, more stringent German product liability law.

The German draft regulations (Fisch-V0) also contain another potential problem for the fish trade. This is the proposal to establish a maximum level of 200 Milligrams of Histamine per kilo of fish.

PACKAGING AND LABELLING: The West German food labelling ordinance provides that fish and fish products be labelled in such a manner as to indicate the name and location of the producer or packer, contents according to the usual tradename, quantity in metric measurement, durability (shelf life), manner of preparation, list of ingredients including additives or preserving agents, etc. The German importer is obliged by law to inform the foreign supplier of all labelling or marking requirements and the exact German text to be used.

Importers may be requested to submit certificates of origin for goods subject to quota restrictions ... and for other imports subject to preferential treatment. No special form is required, but it must be complete with the description of goods and the name and address of the manufacturer and/or shipper, marks and numbers of the packages and their contents, value and mode of transportation.

DOCUMENTATION: The following are the documentary requirements exporters must meet which are based on the law and/or regulations when shipping to this particular market. On commercial shipments to Germany, the documents required are:

- Air Waybills (9 copies on standard IATA forms. Forward 3 copies with shipment)
- Bill of Lading (make out 'To order')
- Commercial Invoice (one copy to be signed by shipper)
- Certificate of origin (2 copies required in cases of special tariff treatment, non-liberalized goods or when required by importer for Letter of Credit)
- Shipper's Export Declaration (4 copies)
- Sanitary (Health) Certificate (issued by DFO Inspection Branch)

Documents in English or French are acceptable.

OTHER: Business Etiquette - Visits during July and August are ill-advised. Punctuality, politeness and a degree of formality are far more significant to a German businessman than to his North American counterpart. Failure to acknowledge this could end any business possibilities.

A thorough knowledge of your product including delivery periods, shipping costs, extent of distribution support and other characteristics is essential.

Most German businessmen will not risk their reputation by becoming overly dependent on a new supplier. Good performance will be rewarded.

FACTORS FAVOURABLE FOR CANADIAN EXPORTS:

- Support provided by the PEMD program
- Canadian participation in major trade fairs in Europe i.e. ANUGA in Cologne, SIAL in Paris
- Canadian participation in trade missions
- Canadian industry's use of Canadian Government export promotion activities
- Canada's position as one of the few major sources of international fish supplies
- Strong sectoral capability in Canada

REASONS FOR LACK OF CANADIAN EXPORTS TO DATE:

- Non-competitive pricing - Difficult to compete on price basis with herring and mackerel from Denmark and Netherlands which harvest these species by factory freezer trawlers.
- High tariffs (i.e. 20 percent tariff on canned herring) relative to duty free status enjoyed by EC suppliers and preferences enjoyed by EFTA suppliers (Norway, Iceland, Sweden, etc.).
- Non-tariff protectionist measures. (i.e. Tariff Rate Quotas)
- Possible reluctance from Canadian exporters to cultivate a market other than the U.S. and a reluctance to introduce new products.

REASONS FOR PREVIOUS SUCCESS OF CANADIAN EXPORTERS:

See section above - Factors Favourable for Canadian Exports

LIMITATIONS OF SOURCING TOOLS CURRENTLY AVAILABLE:

- Sourcing assistance is available from Canadian federal and provincial governments and departments. WIN Export and BOSS computer directory of Canadian exporters, their products and company profile.

- Supply reports by External Affairs and Fisheries and Oceans provide data on Canadian supply capabilities.
- Product/service information from Canadian companies - Good company literature permits Post officers to work effectively for Canadian exporters. Literature should be left with firms when visiting West Germany.
- Need to update information on regular basis.
- Visit Reports - Headquarters and post officers provide reports of visits by companies interested in the market, their capabilities and objectives - this information may often provide leads on supply sources.

POST EXPORT SUPPORT ACTIVITIES PLANNED OR IN PROGRESS:

1. Update existing fish fact sheets describing the German market for selected species.

Results expected: Make Canadian suppliers aware of opportunities and distribution channels.

Status:

2. Continue to introduce high value products for the delicatessen market.

Results expected: Sales increase by 5%.

Status:

3. Develop new channels of distribution other than importers, wholesalers, retailers, etc.

Results expected: Sales increase by 5%.

Status:

TIPS ON APPROACHING THE MARKET: There are good export opportunities for Canadian fish products in West Germany however there are some disadvantages for Canadians. Over the years, Dutch and Scandinavian suppliers have developed an expertise in meeting the specific requirements of the German market. This factor as well as their proximity to the market and their tariff preferences means that they can generally outperform North American newcomers.

German importers, brokers and processors are professional to the point of perfection and they require that their trading partners maintain the same degree of professionalism and close attention to detail. They

insist on meticulous care in all transactions as the only way of adhering to precise cost scheduling that is necessary to the survival of their processing industry in a highly competitive market.

In practical terms, this means that exporters must comply with technical specifications but also ensure prompt and complete responses to requests for offers, precise grading of products, complete and accurate labelling of packages, and speedy shipments. This does not mean that the German market accepts only products of premium quality. On the contrary, the market is very value conscious and will accept products of medium quality - but of consistent standard at reasonable prices.

The development of EEC directives on fisheries products is being monitored closely through an interdepartmental working group that has been established on the EC internal market integration. The working group will analyse the situation as it evolves to identify and resolve potential barriers as well as to identify opportunities for Canadian exporters.

The following information may be useful in general terms in approaching the German market:

1. Finding a niche: For many companies, the secret of success, particularly on the highly competitive consumer market, is to identify and exploit a narrow market segment. To identify this niche, on-the-spot market research is virtually essential. Regional variations in consumer spending patterns are much more marked in Germany than many similar-sized countries, and importers should always seek local advice to establish whether their product is accepted well in a particular area. Even domestic producers usually pick a "Nielsen" area to test their product prior to launch.

Foreign producers should always be prepared to see the market from the German point of view and adapt their product accordingly.

2. Trade fairs: Even for domestic firms, trade fairs are a crucial part of selling in Germany; for foreigners, they provide perhaps the best possible gateway to the market. But it is essential to avoid exhibiting until the product is completely ready for the German market.

3. Sources of information: There are many official and quasi-official sources of information. The Canadian Association of Fish Exporters (CAFE) in Ottawa can provide advice on markets. A local German chamber of commerce (Toronto, Montreal, Edmonton) may be a valuable source. A central source of literature in English is the German Foreign Trade Information Office (Postfach 10 80 07, Köln 1), which produces a helpful publication called "How to approach the German market", and another on "Import Duties, Taxes and Import Regulations".

4. Adapting to the market: Any firm trying to break into the sophisticated and fiercely competitive German market must maintain consistently high product standards. Germans are prepared to pay high prices for their purchases, but demand high quality in return.

5. Using an agent: It is possible to sell direct to the major buying organizations in West Germany. But by far the majority of trade in West Germany is handled by agents, and buyers are used to placing orders with agents who pay regular visits.

German agents are, on the whole, extremely efficient at marketing, especially to large outlets, and their knowledge of buyers and purchasing habits can be invaluable to foreign producers wishing to enter the market in Germany. Most can safely be left to handle sales and distribution from beginning to end. Nevertheless, it pays suppliers to put in an appearance with the buyers at least once a year.

More than 60% of German agents work on commission, although there are also agents who work on consignment, agents who carry stock on their own account, and importers. But agents covering the whole country are few and far between, and most importers are obliged to appoint half a dozen or so to act for them in various regions. This is not quite the drawback it sounds, for there are considerable differences in regional purchasing habits, and a local agent should have a thorough knowledge of local tastes.

Problems and pitfalls: Agents usually handle several suppliers in the same product area, so it is important to establish just what the agent will do. Agents should also be given a detailed brief of a supplier's products, a rundown of advertising and marketing plans, a written agreement of terms of delivery, payment and so on.

Strict regulations, soon to be established on an EC-wide basis, govern the relationship between agent and supplier. But the German Agency Law tends to protect the agent more than the supplier, so it is vital to consult a German lawyer before signing a contract. Sample contracts and German law on such agreements are available in various languages from the agents' and brokers' national association: Centralvereinigung Deutscher Handelsvertreter-und Handelsmakler-Verbande, Geleniusstr 1, Koln 41. The Canadian Consulate General in Dusseldorf can provide valuable advice on choosing an agent.

Government Association Contacts:

1. Embassy of the Federal Republic of Germany
1 Waverley Street
Ottawa, Ontario
K2P 0T8
(613) 232-1101

2. Local German Chamber of Commerce (Toronto, Montreal, Edmonton)
3. German Foreign Trade Information Office Postfach 10 80 07, Koln 1
4. Fishing Industry Marketing Institute (FIMA)
5. Federal Association of the Fish Industry and Fish Wholesalers
Hamburg, West Germany

KEY IMPORT CONTACTS:

"NORDSEE" DEUTSCHE
Hochseefischerei GmbH
Am Lunedeich
2850 Bremerhaven
FRG
phone: 0471/131 telex: 02.387 38
SPECIES/PRODUCTS
cod (frozen), groundfish (frozen)
Also a processor

ADOLF F. RASSAU
Sierichstr. 157
2000 Hamburg 60
FRG
phone: 040.488.006 telex: 02.164 040
SPECIES/PRODUCTS
eels, salmon

APPEL & FRENZEL GMBH
Kieshecker Weg 40
D.4000 Dusseldorf 30
FRG
phone: 0211/424501 telex: 8584959
SPECIES/PRODUCTS
salmon roe

BOSCH & CO. GMBH
Lippeltstr. 1
2000 Hamburg 1
FRG
phone: 040.33 51 75 telex: 02.161 020
SPECIES/PRODUCTS
lobsters (live, frozen & products)

A AND P WAREHANDELS GMBH
Im Heidewinkel 7
2091 Radbruch
FRG
phone: 04178-331 and 393
telex: 2.189201
SPECIES/PRODUCTS
lobster (canned and frozen)

ANGLO-SKANDIA IM - UND
EXPORT GMBH & CO.
GroBe Elbstr. 133
2000 Hamburg 50
FRG
phone: 040 38 18 13
telex: 02.125 65
SPECIES/PRODUCTS
cod (frozen), dogfish,
groundfish (frozen),
herring, salmon

B. ESSMANN & CO.
GroBe Elbstr. 212
2000 Hamburg 50
FRG
phone: 040.38 19 31
telex: 02.12 662
SPECIES/PRODUCTS
lobster (live)

C. LISNER & SOHNE
Werftstr. 14
Postfach 270
D.4230 Wesel/Rhein.
FRG
phone: 0281/23001
telex: 812860
SPECIES/PRODUCTS
salmon roe

CARL SIMONSEN
Elbchaussee 26
2000 Hamburg 50
FRG
phone: 040.39 13 45 telex: 02.11 384
SPECIES/PRODUCTS
dogfish, herring (agent)

CAVIAR IM - UND EXPORT GMBH & CO.
Ohlweg 5
D.2000 Hamburg-Barsbüttele
FRG
phone: 040/670951 telex: n/a
SPECIES/PRODUCTS
salmon roe

CHRISTIAN GOEDECKEN JR.
Große Elbstr. 210
2000 Hamburg 50
FRG
phone: 040.389 991 telex: 02.212 513
SPECIES/PRODUCTS
lobster (live), salmon (processor), salmon roe

ERICH KONIG
Nordbahnstr. 10
1000 Berlin 51
FRG
phone: 030/491 11 00 telex: 01.81 677
SPECIES/PRODUCTS
eels (processor), salmon (processor)

F. SCHOTTKE GMBH & CO.
P.O. Box 29 04 08
2850 Bremerhaven
FRG
phone: 0471/720 31
telex: 02.387 73
SPECIES/PRODUCTS
cod (frozen), groundfish (frozen)

CASPIAN CAVIAR
Schauenburger Str. 59
D.2000 Hamburg 1
FRG
phone: 040/365255
telex: 2.173060
SPECIES/PRODUCTS
salmon roe

CAVIAR-CHRISTENSEN (ABBA
GMBH)
Große Elbstr. 160
2000 Hamburg 50
FRG
phone: 040.38 11 91
telex: 02.147 77
SPECIES/PRODUCTS
eels, salmon (processor),
salmon roe

DEUTSCHE SEE
Am Lunedeich
2850 Bremerhaven
FRG
phone: 0471-131
telex: 02.387 41
SPECIES/PRODUCTS
lobster (live)

ERNST J.L. FRANKE (GMBH &
CO.)
Abba GmbH
Große Elbstr. 212
2000 Hamburg 50
FRG
phone: 040/38 70 77
telex: n/a
SPECIES/PRODUCTS
salmon

FR. PEDERSEN
Große Elbstr. 152
2000 Hamburg 50
FRG
phone: 040-38 16 17
telex: 02-129 61
SPECIES/PRODUCTS
lobsters (live)

ERNST KRATZENSTEIN & CO.
(GmbH & Co.)
Rothenbaumchaussee 58
2000 Hamburg 13
FRG
phone: 040.417099 telex: 02.14045
SPECIES/PRODUCTS
herring (also an agent)

FLAMINGO-FISCH GMBH & CO. KG
Fischereihafen
Halle 8
2850 Bremerhaven
FRG
phone: 0471/710 94 telex: 02.386 14
SPECIES/PRODUCTS
cod (frozen), groundfish (frozen)

FRIEDRICH WILHELM LUBBERT
GmbH & Co.
Wittlingstrasse
2850 Bremerhaven
FRG
phone: 0471-72084
telex: 02.38641
SPECIES/PRODUCTS
cod, groundfish (frozen), herring

GOTTFRIED FRIEDRICHS
Borselstr. 26
2000 Hamburg 50
FRG
phone: 040-39 12 21 telex: 02-131 14
SPECIES/PRODUCTS
eels (processor), salmon (processor),
salmon roe

HORST BERTRAM
Lohdorfer Str. 156
5650 Solingen 11
FRG
phone: 02122/620 66 telex: 08.514 558
SPECIES/PRODUCTS
salmon (agent)

FRIGO FOOD IMPORT GMBH
Große Elbstr. 141
2000 Hamburg 50
FRG
phone: 040-38 14 61
telex: 02.12 595
SPECIES/PRODUCTS
lobster (frozen & products)

HEINZ BOTTCHER
President-Herwig Str
2190 Cuxhaven
FRG
phone: 04721-22004
telex: 02.32142
SPECIES/PRODUCTS
herring (also an agent)

HUSSMANN & HAHN
Fischereihafen
2190 Cuxhaven
FRG
phone: 04721-60 150
telex: 02.32 151
SPECIES/PRODUCTS
cod (frozen), dogfish,
groundfish (frozen),
herring, salmon roe
(processor of all items)

INTERNATIONAL EMPORIUM
Außenhandels GmbH
Uhlandstr. 66
2000 Hamburg 76
FRG
phone: 040-25 80 01
telex: 2.15 525
SPECIES/PRODUCTS
eels

JULIUS JORGENSEN (GmbH & Co.)
Schopenstehl 20-21
2000 Hamburg 1
FRG
phone: 040-32 23 11
telex: 02.161016
SPECIES/PRODUCTS
herring

IFICO
P.O. Box 29 00 59
2850 Bremerhaven
FRG
phone: 0471/730 51 telex: 02.388 84
SPECIES/PRODUCTS
cod (frozen), groundfish (frozen)
Also a processor

JORGEN CHRISTENSEN
Papenstrasse 32
D-2000 Hamburg 70
FRG
phone: 040/250 60 04 telex: 02-165504
SPECIES/PRODUCTS
eels, salmon roe

KARSTEN HAGENA
Schnackenburgallee 8
2000 Hamburg 50
FRG
phone: 040-850 10 65
telex: 02.119 12
SPECIES/PRODUCTS
eels, lobster (live), salmon

MOVENPICK RESTAURANTBETRIEBS - UND
Handelsgesellschaft
Mr. Gunter H. Husslein
Morikestr. 67
7000 Stuttgart 1
FRG
phone: 0711/701 060 telex: 07.23362
SPECIES/PRODUCTS
freshwater fish (also an agent)

OCEAN-FISCH
Am Lunedeich
2850 Bremerhaven
FRG
phone: 0471/72 071 telex: 02.388 31
SPECIES/PRODUCTS
cod (frozen), groundfish (frozen)

L.G. CARRION & CO.
Gr. Johannisstr. 13
2000 Hamburg 11
FRG
phone: 040-365961
telex: 02.14717
SPECIES/PRODUCTS
herring (agent)

NORDA HERINGSHANDELSGES, MBH
Behringstr. 156
2000 Hamburg 50
FRG
phone: 040-88 20 71
telex: 02.134 34
SPECIES/PRODUCT(S)
dogfish, herring (processor)

PACKFISCH
VERKAUFSGESELLSCHAFT
Hamburger Fischereien
Ausrustungskai 6
2000 Hamburg 50
FRG
phone: 040/38 02 020
telex: 02.157 30
SPECIES/PRODUCTS
cod (frozen), groundfish
(frozen)

RUDOLF KANZOW
Hammerbrookstr. 90
2000 Hamburg 1
FRG
phone: 040/23 41 81
telex: 02.162 981
SPECIES/PRODUCTS
cod (frozen), freshwater
fish (also an agent),
groundfish, lobster (frozen
& products), salmon (also an
agent)

SCHREIBER & MOLL
Banksstraße 20-26
2000 Hamburg 1
FRG
phone: 040-33 17 36 telex:
02.152 255
SPECIES/PRODUCTS
salmon (agent)

PAUL KORNER GmbH
Mengstraße 66
2400 Lubeck
FRG
phone: 0451-71378 telex: 02.6871
SPECIES/PRODUCTS
herring (also a processor)

STUHRK DELIKATESSEN IMPORT
Ohleckerring 28.30
D-2000 Hamburg 62
FRG
phone: 040/531 30 15
telex: 2165115
SPECIES/PRODUCTS
salmon roe

THORMAHLEN & CO.
Alte Landstr. 7
2070 Schmalenbeck
FRG
phone: 04102/635 54
telex: 02.189 859
SPECIES/PRODUCTS
eels, salmon

Export and Investment Promotion Planning System

88/89 Sector/Sub-Sector Highlights
Submitted by Sector, Region, Post

Sector: 002 FISHERIES, SEA PRODUCTS & SERV.

Subsector: 021 FISH & SHELLFISH & OTHER PROD

Region: WESTERN EUROPE

Mission: 424 DUSSELDORF

Market: 128 GERMANY WEST

Statistical Data On Sector/sub-sector	Next Year (Projected)	Current Year (Estimated)	1 Year Ago	2 Years Ago
Mkt Size (import) \$	1055.00M	\$ 1162.00M	\$ 1179.00M	\$ 1057.00M
Canadian Exports \$	25.00M	\$ 20.00M	\$ 31.00M	\$ 35.00M
Canadian Share of Import Market	2.40%	1.70%	2.60%	3.30%

Major Competing Countries

Market Share

i) 609 EUROPEAN COMMON MARKET C	060 %
ii) 608 WEST EUROPE	035 %
iii) 616 OTHER COUNTRIES	005 %

Cumulative 3 Year Export Potential For CDN Products
in this Sector/Subsector: 30-60 \$M

Current Status of Canadian Exports: Market Share Declining

Products/services for which there are good market prospects	Current Total Imports in Canadian \$.
i) LIVE/FROZEN LOBSTER	\$ 7.80 M
ii) SHRIMPS	\$ 0.42 M
iii) SMOKED SALMON	\$ 1.40 M
iv) FROZEN SALMON	\$ 5.80 M
v) SALMON ROE	\$ 0.00 M
vi) CANNED SALMON	\$ 0.00 M
vii) COD	\$ 0.00 M

The Trade Office reports that the following factors influence Canadian export performance in this market for this Sector (Sub-Sector).

- there are import restrictions which can present significant problems
- the degree of import duty protection of local industry tends to be high

Export and Investment Promotion Planning System

MISSION: 424 DUSSELDORF

COUNTRY: 128 GERMANY WEST

In the Trade Office's opinion, Canadian export performance in this sector (sub-sector) in this market is lower than optimum mainly because of:

- non competitive pricing
- high tariffs
- non-tariff protectionist measures which are difficult to overcome
- other factor(s) described by the Trade Office as follows:
RELUCTANCE FROM CANADIAN PROCESSORS TO CULTIVATE A MARKET OTHER THAN THE US, AND A RELUCTANCE TO INTRODUCE NEW PRODUCTS.

Some Canadian Exporters to this Market in this Sector (Sub-Sector) have enjoyed success previously as a result of a variety of factors which the Trade Office reports to include:

- support provided by the PEMD program
- participation in trade fairs
- participation in trade missions
- use of Canadian Government export promotion activities
- Canada's position as one of the few major sources of international supply
- strong sectoral capability in Canada

The Trade Office has recommended that a comprehensive market study of this Sector (Sub-Sector) would enhance the knowledge of Canadian exporters to this market.

In support of Canadian exports in this Sector (Sub-Sector) the Trade Office is currently engaged in activities which include:

Activity: UPDATE EXISTING FISH FACT SHEETS DESCRIBING THE GERMAN MARKET FOR SELECTED SPECIES.

Results Expected: MAKE CANADIAN SUPPLIERS AWARE OF OPPORTUNITIES AND DISTRIBUTION CHANNELS.

For the next fiscal year, the Trade Office is planning to undertake the following new export support initiative(s) in this Sector (Sub-Sector):

Activity: CONTINUE TO INTRODUCE HIGH VALUE PRODUCTS FOR THE DELICATESSEN MARKET.

Results Expected: SALES INCREASE BY 5%

Activity: DEVELOP NEW CHANNELS OF DISTRIBUTION OTHER THAN IMPORTERS: WHOLE-SALERS, RETAILORS, ETC.

Results Expected: SALES INCREASE BY 5%

Comp. Murphy FPI

The following EEC tariffs apply as of January 1989:

A: Conventional rates apply to Canada and to other contracting parties to the GATT (unless the Autonomous duty is lower).

B: Autonomous rates apply when they are lower than conventional rates. Tariff quotas in the form of temporary suspensions of the autonomous rates, which are also applicable to the GATT signatories when the tariff advantages exceed those bound in GATT, are instituted to cope with under-supply on the domestic market. These tariff suspensions are published in the Official Journal of the EEC.

C: Generalized System of Preferences (GSP) rates apply to developing countries including ACP (African, Caribbean and Pacific countries signatory to the Lome convention), LDDC (least developed among developing countries), and MED countries (Mediterranean countries which enjoy special preferences under an association or other preferential agreement with the EEC).

D: Other Preferential rates apply to countries which have concluded special agreements with the EEC or have been granted special treatment by the EEC. These are:

FO: Faroe Islands; N: Norway; IS: Iceland; DZ: Algeria;

ET: Egypt; MA: Morocco; TN: Tunisia; TR: Turkey;

LO: ACP and OCT countries. Greenland enjoys free access for all products.

Fish - fresh (live or dead), chilled or frozen

	A	B	C	D
<u>Freshwater fish:</u>				
1) Trout and other Salmonidae				
a) Trout	12	16	10	DZ, MA, TN, LO: 0; TR: 2.4
b) Salmon	2	16		DZ, MA, TN, TR, LO: 0
c) Lake whitefish	8	16		
d) Other -fresh or chilled	8	16		
-frozen	9	16		
2) Eels (<u>Anguilla</u> spp.)	3	10		DZ, MA, TN, TR, LO: 0
3) Carp	8	10		DZ, MA, TN, TR, LO: 0
4) Aquarium fish	Free	10		
5) Other	8	10		

Saltwater fish

1) Whole, headless or in pieces:

a) Herring:

From 15FEB to 15JUN:

Fresh or chilled Free Free
Frozen Free Free

From 16JUN to 14FEB:

Fresh or chilled 15 20 DZ, MA, TN, LO: 0;
TR: 3
Frozen 15 20 DZ, MA, TN, LO: 3;
TR: 3

b) Sprats:

From 15FEB to 15JUN Free Free

From 16JUN to 14FEB 13 20 DZ, MA, TN, LO: 0;
TR: 3

c) Tuna (Thunnus & Euthynnus spp.):

(For further processing, and other)

Whole:

Yellowfin (Thunnus albacares):

-Weighing no more than
10 kg each -fresh, chilled 22 25
-frozen 20 25
-Other -fresh, chilled 22 25
-frozen 20 25

Albacore (Thunnus alalunga) 22 25
Other 22 25

Gilled and gutted:

Yellowfin (Thunnus albacares):

-Weighing no more than
10 kg each 22 25
-Other 22 25

Albacore (Thunnus alalunga) 22 25
Other 22 25

Other (e.g. "heads off"):

Yellowfin (Thunnus albacares):
-Weighing no more than
10 kg each 22 25
-Other 22 25

Albacore (Thunnus alalunga) 22 25
Other 22 25

DZ, MA, TN, TR, LO: 0

2) Other:

a) Sardines

(Sardina pilchardus):

-Fresh or chilled 23 25 DZ, MA, TN, LO: 0;
TR: 4.6

-Other 23 25 DZ, MA, TN, LO: 0
TR: 4.6

Of the genus <u>Sardinops</u> :			
-Fresh or chilled	15	15	
-Other	15	15	
<u>Sardinella</u> spp.			
-Fresh or chilled	15	15	
-Frozen	15	15	
b) Sharks:			
Dogfish (<u>Squalus acanthias</u> and <u>Scylliorhinus</u> spp.):			
-Fresh or chilled	8	15	4 DZ, MA, TN, TR, LO: 0
-Frozen	8	15	4 DZ, MA, TN, TR, LO: 0
Other:			
Porbeagles (<u>Lamna cornubica</u> ; <u>Isurus Nasus</u>)	8	15	4 DZ, MA, TN, TR, LO: 0 FO: 1.6
Other	8	15	4 DZ, MA, TN, TR, LO: 0
c) Redfish (<u>Sebastes marinus</u>):			
-Fresh or chilled	8	15	DZ, MA, TN, TR, LO: 0; IS: 2
-Frozen	8	15	DZ, MA, TN, TR, LO: 0; IS: 2
Redfish (Other)	15	15	
d) Atlantic halibut and Lesser or Greenland halibut:			
Atlantic halibut (<u>Hippoglossus hippoglossus</u>):			
-Fresh or chilled	8	15	4 DZ, MA, TN, TR, LO: 0; FO: 1.6
-Frozen	8	15	4 DZ, MA, TN, TR, LO: 0; FO: 1.6
Lesser or Greenland halibut (<u>Reinhardtius hippoglossoides</u>):			
-Fresh or chilled	8	15	DZ, MA, TN, TR, LO: 0; FO: 1.6
-Frozen	8	15	DZ, MA, TN, TR, LO: 0; FO: 1.6
Pacific halibut (<u>Hippoglossus stenolepis</u>)	15	15	
e) Cod (<u>Gadus morhua</u>):			
-Fresh or chilled	12	15	DZ, MA, TN, TR, LO: 0; IS: 3.7
-Frozen	12	15	DZ, MA, TN, TR, LO: 0; IS: 3.7
<u>Boreogadus saida</u>	12	15	
Cod (Other)	15	15	
f) Saithe, Coalfish (<u>Pollachius virens</u>):			
-Fresh or chilled	15	15	DZ, MA, TN, TR, LO: 0; IS: 3.7
-Frozen	15	15	DZ, MA, TN, TR, LO: 0;

g) Haddock (<u>Melanogrammus aeglefinus</u>):			
Fresh or chilled	15	15	DZ, MA, TN, TR, LO:0; IS:3.7
Frozen	15	15	DZ, MA, TN, TR, LO:0; IS:3.7
h) Whiting (<u>Merlangus merlangus</u>):			
Fresh or chilled	15	15	DZ, MA, TN, TR, LO:0
Frozen	15	15	DZ, MA, TN, TR, LO:0
i) Ling (<u>Molva</u> spp.):			
Fresh or chilled	15	15	DZ, MA, TN, TR, LO:0
Frozen	15	15	DZ, MA, TN, TR, LO:0
j) Alaska pollock (<u>Theragra chalcogramma</u>) and pollock (<u>Pollachius pollachius</u>):			
Fresh or chilled	15	15	DZ, MA, TN, TR, LO:0
Frozen	15	15	DZ, MA, TN, TR, LO:0
k) Mackerel (<u>Scomber scombrus</u> , <u>Scomber japonicus</u> , <u>Orcynopsis unicolor</u>):			
From 15FEB to 15JUN:			
Fresh or chilled	Free	Free	
Frozen	Free	Free	
From 16JUN to 14FEB:			
Fresh or chilled	20	20	DZ, MA, TN, TR, LO:0
Frozen	20	20	DZ, MA, TN, TR, LO:0
l) Anchovies (<u>Engraulis</u> spp.):			
Fresh or chilled	15	15	DZ, MA, TN, LO:0; TR:3
Frozen	15	15	DZ, MA, TN, LO:0; TR:3
m) Plaice (<u>Pleuronectes platessa</u>):			
Fresh or chilled:			
-Barbel mullet, rock mullet, sea perch, sea dace and sole	15	15	DZ, MA, TN, TR, LO:0
-Aquarium fish	15	15	DZ, MA, TN, TR, LO:0
-Other	15	15	DZ, MA, TN, TR, LO:0
Frozen:			
-Barbel mullet, rock mullet, sea perch, sea dace and sole	15	15	DZ, MA, TN, TR, LO:0
-Aquarium fish	15	15	DZ, MA, TN, TR, LO:0
-Other	15	15	DZ, MA, TN, TR, LO:0
n) Flounder (<u>Platichthys flesus</u>):			
Fresh or chilled	15	15	DZ, MA, TN, TR, LO:0
Frozen	15	15	DZ, MA, TN, TR, LO:0

o) Sea bream (species <u>Dentex</u> and <u>Pagellus</u> spp.):			
Fresh or chilled	15	15	DZ, MA, TN, TR, LO:0
Frozen	15	15	DZ, MA, TN, TR, LO:0
p) Hake (<u>Merluccius</u> spp.):			
Fresh or chilled	15	15	DZ, MA, TN, TR, LO:0
Frozen	15	15	DZ, MA, TN, TR, LO:0
Hake (<u>Urophycis</u> spp.):			
Fresh or chilled	15	15	
Frozen	15	15	
q) Megrin (<u>Lepidorhombus</u> spp.):			
Fresh or chilled	15	15	DZ, MA, TN, TR, LO:0
Frozen	15	15	DZ, MA, TN, TR, LO:0
r) Ray's bream (<u>Brama</u> spp.):			
Fresh or chilled	15	15	DZ, MA, TN, TR, LO:0
Frozen	15	15	DZ, MA, TN, TR, LO:0
s) Monkfish (<u>Lophius</u> spp.):			
Fresh or chilled	15	15	DZ, MA, TN, TR, LO:0
Frozen	15	15	DZ, MA, TN, TR, LO:0
t) Blue whiting (<u>Micromesistius</u> <u>poutassou</u> or <u>Gadus</u> <u>poutassou</u>)			
	15	15	DZ, MA, TN, TR, LO:0
u) Aquarium fish	15	15	Free DZ, MA, TN, TR, LO:0
u) Other	15	15	DZ, MA, TN, TR, LO:0
3) Fillets			
a) Fresh or chilled:			
-Of trout and other <u>Salmonidae</u>	12	16	
-Of salmon	2	16	
-Of other freshwater fish	9	13	
-Of cod (<u>Gadus</u> spp. and <u>Boreogadus</u> <u>saida</u>)	18	18	DZ, MA, TN, LO:0; TR:3.6
-Other	18	18	
b) Frozen:			
-Of trout and other <u>Salmonidae</u>	12	16	
-Of salmon	2	16	
-Of other freshwater fish	9	13	
-Of cod (<u>Gadus</u> <u>morhua</u> , <u>Boreogadus</u> <u>saida</u> , <u>G.</u> <u>ogac</u> , <u>G.</u> <u>macrocephalus</u>)	15	18	DZ, MA, TN, LO, IS:0; FO, N, TR:3
-Of saithe (<u>Pollachius</u> <u>virens</u>)	15	18	DZ, MA, LO, IS:0; FO, N, TR:3
-Of haddock (<u>Melanogrammus</u> <u>aiglefinus</u>)	15	18	DZ, MA, TN, LO, N,

-Of redfish: - <u>Sebastes marinus</u>)	12	18		IS:0; FO,TR:3 DZ,MA,TN,LO,IS:0; FO,N:3; TR:2.5
-Other	15	18		
-Of whiting (<u>Merlangius merlangus</u>)	15	18		DZ,MA,TN,LO,IS:0; FO,N,TR:3
-Of ling (<u>Molva</u> spp.)	15	18		DZ,MA,TN,LO,IS:0; FO,N,TR:3
-Of tuna (<u>Thunnus</u> spp. and <u>Euthynnus</u> spp., and others)	18	18		DZ,MA,TN,LO,IS:0; TR:3.6
-Of mackerel (<u>Scomber scombrus</u> , <u>S. japonicus</u> , <u>S. australisicus</u> and <u>Orcynopsis unicolor</u>)	15	18		DZ,MA,TN,LO,IS:0; N,TR:3
-Of hake: -(<u>Merluccius</u> spp.)	15	18		DZ,MA,TN,LO,IS:0; FO,N,TR:3
- (<u>Urophycis</u> spp.)	15	18		
-Of sharks (<u>Squalus</u> spp.)	15	18	10	DZ,MA,TN,LO,IS:0; FO,N,TR:3
-Of plaice (<u>Fleuronectes platessa</u>)	15	18		DZ,MA,TN,LO,IS:0; FO,N,TR:3
-Of flounder (<u>Platichthys flesus</u>)	15	18		DZ,MA,TN,LO,IS:0; FO,N,TR:3
-Of herring (<u>Clupea</u> spp.)				
-Of megrim (<u>Lepidorhombus</u> spp.)	15	18		DZ,MA,TN,LO,IS:0; FO,N,TR:3
-Of Ray's bream (<u>Brama</u> spp.)	15	18		DZ,MA,TN,LO,IS:0; FO,N,TR:3
-Of monkfish (<u>Lophius</u> spp.)	15	18		DZ,MA,TN,LO,IS:0; FO,N,TR:3
-Of halibut (<u>Hippoglossus</u> spp.)	15	18	1	DZ,MA,TN,LO,IS:0; FO,N,TR:3
-Of other	15	18		DZ,MA,TN,LO,IS:0; FO,N,TR:3

4) Other fish meat, whether or not minced:

a) Of freshwater fish:

-Fresh or chilled	8	8		
-Frozen	8	8		

b) Other, fresh or chilled

15 18

c) Of saltwater fish, frozen:

-Of herring:				
15FEB to 15JUN			Free	Free
16JUN to 14FEB			15	20
-Of redfish (<u>Sebastes</u> spp.)	8	15		
-Of cod:				
<u>Gadus morhua</u>	12	15		
Other spp.	15	15		
-Of other	15	15		

Livers and roes

10 14 5 DZ,MA,TN,TR,LO,
IS:0

Fish - dried, salted or in brine; smoked fish,
whether or not cooked before or during the
smoking process

Dried and/or salted or in brine:

1) Whole, headless or in pieces:

a) Herring	12	12		DZ,MA,TN,TR,LO:0
b) Cod (<u>Gadus morhua</u> , <u>Boreogadus saida</u> , <u>Gadus ogac</u> , <u>Gadus macrocephalus</u>)	13	13		DZ,MA,TN,TR,LO:0
c) Anchovies (<u>Engraulis</u> spp.):				
-Salted or in brine, in barrels or other containers of a net capacity of 10 kg or more	10	15		DZ,MA,TN,TR,LO:0
-Other	10	15		DZ,MA,TN,TR,LO:0
d) Atlantic halibut (<u>Hippoglossus hippoglossus</u>)	-	15	10	DZ,MA,TN,TR,LO:0
e) Lesser or Greenland halibut (<u>Reinhardtius hippoglossoides</u>)	12	15		
f) Salmon, salted or in brine	11	15	2	DZ,MA,TN,TR,LO:0
g) Hilsa spp., in brine	12	15	8	DZ,MA,TN,TR,LO:0
h) Other	12	15		DZ,MA,TN,TR,LO:0

2) Fillets:

a) Of cod (<u>Gadus morhua</u> , <u>Boreogadus saida</u> , <u>Gadus ogac</u>)	20	20		DZ,MA,TN,TR,LO:0
b) Of cod (<u>Gadus macrocephalus</u>)	14	18		
c) Of salmon, salted or in brine	15	18		DZ,MA,TN,TR,LO:0
d) Of Lesser or Greenland halibut (<u>Reinhardtius hippoglossoides</u>) salted or in brine	15	18		DZ,MA,TN,TR,LO:0
e) Of Hilsa spp., in brine	16	18	8	DZ,MA,TN,TR,LO:0
f) Of other	16	18		DZ,MA,TN,TR,LO:0

Smoked, whether or not cooked before or
during the smoking process:

a) Herring	10	16	DZ, MA, TN, TR, LO: 0
b) Salmon	13	16	DZ, MA, TN, TR, LO: 0
c) Lesser or Greenland halibut (<u>Reinhardtius hippoglossoides</u>)	15	16	DZ, MA, TN, TR, LO: 0
d) Atlantic halibut (<u>Hippoglossus hippoglossus</u>)	16	16	DZ, MA, TN, TR, LO: 0
e) Mackerel (<u>Scomber scombrus</u> , <u>S. japonicus</u> , <u>Orcynopsis unicolor</u>)	14	16	DZ, MA, TN, TR, LO: 0
f) Trout	14	16	DZ, MA, TN, TR, LO: 0
g) Eels (<u>Anguilla</u> spp.)	14	16	DZ, MA, TN, TR, LO: 0
h) Other	14	16	DZ, MA, TN, TR, LO: 0
<u>Livers and roes</u>	11	15	DZ, MA, TN, TR, LO, IS: 0
<u>Fishmeal:</u>	13	15	DZ, MA, TN, TR, LO: 0

Crustaceans, molluscs and other invertebrates, whether in shell or not - fresh (dead or live), chilled, frozen, salted, in brine or dried; crustaceans, in shell, simply boiled in water

Crustaceans:

1) <u>Crawfish (Palinurus, Panulirus, Jasus spp.):</u>			
a) Tails	25	25	7 DZ, MA, TN, TR, LO: 0
b) Other	25		7 DZ, MA, TN, TR, LO: 0
2) <u>Lobster (Homarus spp.):</u>			
a) Live	8	25	4 DZ, MA, TN, TR, LO: 0
b) Other:			
-Whole:	8	25	4 DZ, MA, TN, TR, LO: 0
-Other: Frozen	16	25	4 DZ, MA, TN, TR, LO: 0
Other	20	25	4 DZ, MA, TN, TR, LO: 0
3) <u>Crabs and freshwater crayfish:</u>			
a) Crabs of the species <u>Paralithodes camchaticus</u> , <u>Chionoectes</u> spp. and <u>Callinectes sapidus</u>	8	18	4 DZ, MA, TN, TR, LO: 0
b) Edible crabs (<u>Cancer pagurus</u>)	15	18	4 DZ, MA, TN, TR, LO: 0
c) Other	15	18	4 DZ, MA, TN, TR, LO: 0
4) <u>Shrimps and prawns:</u>			
a) Prawns and shrimps of the family <u>Pandalidae:</u>			

-Fresh or frozen	12	18	4	DZ, MA, TN, TR, LO, IS:0; FO:3; ET:6
-Other	12	18	4	DZ, MA, TN, TR, LO, IS:0; FO:3
b) Shrimp of the genus <u>Crangon</u> :				
-Fresh, chilled or simply boiled in water:				
Fresh	18	18		DZ, MA, TN, TR, LO:0; ET:9
Other	18	18		DZ, MA, TN, TR, LO:0
-Other: Frozen	18	18		DZ, MA, TN, TR, LO:0; ET:9
Other	18	18		DZ, MA, TN, TR, LO:0
c) Other:				
-Fresh or frozen	18	18	4.5	DZ, MA, TN, TR, LO:0; ET:9
-Other	18	18	4.5	DZ, MA, TN, TR, LO:0
5) Other:				
a) Norway lobster (<u>Nephrops norvegicus</u>):				
-Frozen	12	14		DZ, MA, TN, LO:0; TR:2.4
-Other	12	14		DZ, MA, TN, LO:0; TR:2.4
b) <u>Perullius</u> spp.	12	14	4	DZ, MA, TN, LO:0; TR:2.4
c) Other	12	14		DZ, MA, TN, LO:0; TR:2.4

Molluscs and other marine invertebrates:

1) Oysters:				
a) European flat oysters (genus <u>Ostrea</u>) live and weighing not more than 40 g each				
b) Other	Free	Free		DZ, MA, TN, LO:0; TR:3.6
	18	18		
2) Scallops (of the genera <u>Pecten</u> , <u>Chlamys</u> , or <u>Placopecten</u>)				
	8	8		DZ, MA, TN, TR, LO:0
3) Mussels (<u>Mytilus</u> spp.)				
(<u>Perna</u> spp.)	10	10	5.5	DZ, MA, TN, TR, LO:0
	8	8		
4) Snails, other than sea snails				
	Free	6		DZ, MA, TN, TR, LO:0
5) Squid (<u>Ommastrephes</u> , <u>Loligo</u> , <u>Illex</u> , <u>Nototodarus</u> , <u>Sepioteuthis</u> spp.):				
-Loligo spp.	6	8	4	DZ, MA, TN, TR, LO:0
-Ommastrephes sagittatus	6	8	4	DZ, MA, TN, TR, LO:0
-Illex spp.	8	8		DZ, MA, TN, TR, LO:0
-Other	8	8		DZ, MA, TN, TR, LO:0

6) Cuttlefish:				
-of the species				
<u>Sepia officinalis, Rossia</u>				
<u>macrosoma, Sepiola rondeleti</u>	8	8	5.5	DZ, MA, TN, TR, LO:0
7) Octopus	8	8	4	DZ, MA, TN, TR, LO:0
8) Striped venus and other				
members of the family				
<u>Veneridae, frozen:</u>				
Clams or cockles	8	8	4	DZ, MA, TN, TR, LO:0
Other	8	8	4	DZ, MA, TN, TR, LO:0
9) Other:				
-Live, fresh or chilled	11	11	4	DZ, MA, TN, TR, LO:0
-Frozen	11	14	4	DZ, MA, TN, TR, LO:0
-Other	11	16	4	DZ, MA, TN, TR, LO:0

Fats and oils of fish and marine mammals,
whether or not refined:

Fish-liver oil:

1) Of vitamin A content exceeding 2500				
international units per gram	6	6	Free	IS, TR, LO:0
2) Of halibut (<u>Hippoglossus</u> spp.)	Free	Free		
3) Other	6	6		
<u>Whale oil and oils of other cetaceans</u>	Free	2		
<u>Other</u>	Free	Free		

Prepared or preserved fish, including
caviar and caviar substitutes:

Caviar and caviar substitutes:

1) Caviar (sturgeon roe)	30	30	12	DZ, MA, TN, LO, IS:0; TR:6
2) Other	30	30	14	DZ, MA, TN, LO, IS:0; TR:6

Salmonidae:

1) Salmon	5.5	20	4	DZ, MA, TN, TR, LO:0
2) Other	7	20	4	DZ, MA, TN, TR, LO:0

Herring:

1) Fillets - raw, coated with batter or				
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breadcrumbs, deep frozen	15	18		DZ, MA, TN, LO, IS: 0; FO, N, TR: 3
2) Other:				
a) Fillets of herring, vinegar-cured	20	23		DZ, MA, TN, LO: 0; FO, TR: 4; IS: 10
b) Other	20	23		DZ, MA, TN, LO: 0; TR: 4; IS: 10
<u>Sardines</u>	25	25		LO: 0; TR: 5
<u>Sardinella or sprats</u>	20	25		
<u>Tuna</u>	24	25		LO: 0; DZ, MA, TN: 9.6
<u>Bonito (Sarda spp.)</u>	25	25	18	DZ, MA, TN, LO: 0; TR: 4.2
<u>Mackerel (Scomber scombrus, S. japonicus)</u>	25	25	19	DZ, MA, TN, LO: 0; TR: 4.2
(<u>Scomber australisicus</u>)	20	25		
<u>Anchovies (Engraulis spp.)</u>	-	25		DZ, MA, TN, LO: 0; TR: 5
<u>Other:</u>				
1) Fillets - raw, coated with breadcrumbs, deep frozen	15	18	10	DZ, MA, TN, LO, IS: 0 FO, N, TR: 3
2) Other:				
a) Sprats (<u>Spratus spratus</u>) in airtight cans	20	25	9	DZ, MA, TN, LO, IS: 0; FO, TR: 4; N: 12
b) Preserved smoked coalfish	20	25	9	DZ, MA, TN, LO: 0; TR: 4
c) Other	20	25	9	DZ, MA, TN, LO, IS: 0; FO, TR: 4

Crustaceans and molluscs - prepared or preserved

Crabs:

1) In airtight cans	16	20	6	DZ, MA, TN, TR, LO, IS: 0; N: 7.5
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Freight Forwarders: Exporters may wish to entrust their shipments to a freight forwarder rather than handling the arrangements for foreign delivery and related documentation themselves.

Freight forwarders provide expertise as to the most cost effective shipping arrangements and act as the shipper's coordinator, controlling and monitoring the shipment from collection to delivery. This includes the related documentation, storage, customs clearance, examination of goods, collection of payments and other handling services as specified in the freight handling contract.

Cost and quality of service are both important when choosing a freight forwarder. Industry Science and Technology Canada publishes a "Directory of Canadian Customs Brokers and Freight Forwarders" as part of its Business Opportunities Sourcing System (BOSS). Copies may be obtained from your local ISTC office. Online computer access to the BOSS system may be arranged by calling (613)954-5031.

MARINE REFRIDGERATED CARGO SERVICE

<u>Carrier Time</u>	<u>Agent</u>	<u>Sailing</u>	<u>Service & Frequency</u>	<u>Ports of Discharge</u>	<u>Transit</u>
ABC CONTAINER LINE	Deapsea Marine Montreal: 514-282-9211 FAX: 514-282-8883 TLX: 055-62109 *Ms. Linda Poirier	Halifax	Bi-monthly 20'reefer container	ANTWERP, Belgium (overland service to Switzerland)	8 days
				Rotterdam, Holland Hamburg, West Germany	9 days 9 days
	Halifax: 902-420-0679 FAX: 902-423-8031 TLX: 019-21519 *Ms. Brenda Norman			Bi-weekly transshipment to Gothenburg, Sweden Arhaus, Denmark and Malmo, Sweden	+3 days
				FOS	18 days
ACL CANADA	Montreal: 514-871-3333 FAX: 514-871-3251 TLX: 05561089	Halifax	Bi-weekly	Le Havre, France Rotterdam, Holland (overland services to Switzerland)	10 days 12 days
			Mondays		
	Halifax: 902-420-8550		40' containers	Bremerhaven, West Germany	13 days
				Gothenburg, Sweden (overland service to Denmark)	15 days
		Halifax	Wednesdays	Antwep, Belgium	8 days
			40' containers	Hamburg, West Germany Brehmerhaven, " "	10 days 9 days
				(overland service to Denmark)	
				Le Havre, France	11 days

MARINE REFRIDGERATED CARGO SERVICE

<u>Carrier Line</u>	<u>Agent</u>	<u>Sailing</u>	<u>Service & Frequency</u>	<u>Ports of Discharge</u>	<u>Transit</u>
CANADA MARITIME	Montreal: 514-934-5518 FAX: 514-934-5205 TLX: 055-60434 *Mr. Bill Newton	Montreal	Weekly Saturday or Monday	Antwerp, Belgium	13 days
				(overland service to Switzerland) Hamburg, West Germany	10 days
MAERSK CANADA	Montreal: 514-871-0210 FAX: 514-871-8269 Toronto: 416-863-6621 FAX: 416-863-1695 TLX: 06-217734 Halifax: 902-422-7331 FAX: 902-423-0219		Weekly on Wednesdays 40' containers	Le Havre, France	9 days
				Rotterdam, Holland (overland service to Switzerland)	13 days
				Bremerhaven, W.G.	+2 days 14 days
				Transshipment to Oslo, Norway	+5 days
				Copenhagen, Denmark	+2 days
				Malmo, Sweden	+2 days
				Gothenberg, Sweden	+4 days

MARINE REFRIDGERATED CARGO SERVICE

<u>Carrier Time</u>	<u>Agent</u>	<u>Sailing</u>	<u>Service & Frequency</u>	<u>Ports of Discharge</u>	<u>Transit</u>
HAPAG- LLOYD	Montreal Shipping Montreal: 514-286-4620 FAX: 514-286-9163 *Mr. Derrick Cornacchia Halifax: 902-420-1133 *Mr. Peter Selig	Halifax	weekly (a) Mondays 20' and 40' reefer containers	Le Havre, France	10 days
				Rotterdam, Holland (overland service to Switzerland)	12 days
				Bremerhaven, W.G.	13 days
				Antwerp, Belgium	8 days
				Bremerhaven, W.G.	10 days
POLISH OCEAN LINES	Seabridge International Montreal: 514-281-1797 FAX: 514-284-9319 TLX: 05-24864 *Mr. Kevin Doherty	Halifax	Weekly on Sundays 40' reefer containers	Rotterdam, Holland	16 days
				Bremerhaven, W.G.	17 days
				Transshipment to Copenhagen, Denmark	+2 days
				Arhaus, Denmark	+2 days
				Malmo, Sweden	+2 days
SEALAND	International Sealand Shipping Montreal: 514-367-0340 FAX: 514-367-2253 *Mr. John Keane Toronto: 416-456-3940	Port Elizabeth N.J.	Weekly on Saturdays (Closing Montreal previous Wednesday) 40' reefer Containers	Bremerhaven, W.G.	13 days
				Hamburg, W.G. (transshipment to Switzerland)	14 days
				Rotterdam, Holland	16 days
				Transshipment to Gothenberg, Swenden)	18 days

MARINE REFRIDGERATED CARGO SERVICE

<u>Carrier Time</u>	<u>Agent</u>	<u>Sailing</u>	<u>Service & Frequency</u>	<u>Ports of Discharge</u>	<u>Transit</u>
ZIM CONTAINER SERVICE	Zim Israel Navigation Montreal: 514-288-2335 FAX: 514-282-8094 TLX: 05267449 *Mr. Zelko Celan Halifax: 902-422-1251	Halifax	Every 8 Days 40'reefer containers	Alexandria (via HAIFA)	15 days
LYKES LINES	Bernas Transportation Montreal: 514-499-1588 FAX: 514-499-1328 TLX: 05560152 *Ms. Diane Betts Toronto: 416-238-0598	NYC	Bi-monthly Maritime shippers responsible for own delivery to New York	Alexandria	14 days
EGYPTIAN	Seabridge International Montreal: 514-281-1797 FAX: 514-284-9319 TLX: 0524864 *Mr. Bob Allan		No regular sailing from East Coast upon inducement 40' reefer containers	Alexandria	

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