

The Belgian Market for Fishery Products

Belgium's small fishing industry has had stable catches for the past several years (Table 1). Domestic landings, however, provide only about one-third of the country's total supply of fishery commodities, and imports of edible fishery products have averaged over 100,000 metric tons (t) annually since 1973. Prospects for increased domestic catches are poor because traditional coastal fishery resources are depleted and catch allocations severely restrict local fishermen. Belgium thus appears to be an excellent, if small, potential market for increased U.S. fishery exports. Such exports in 1976 totaled only 2,800 tons, valued at \$12.6 million, or 2.5 percent in volume and 10 percent in value of total Belgian fishery imports.

Fleet and Catch

Belgian fishing vessel numbers have been declining since the 1950's. The fleet in 1978 was comprised of 215 vessels with a total of 20,700 GRT. Most Belgian fishing vessels are small; only 89 have a capacity exceeding 100 GRT. When compared with vessels owned by fishermen from other members of the European Economic Community (EEC), the Belgian fleet appears unusually small (Table 2). Belgium, unlike other EEC countries, has virtually no distant-water fishing fleet. Fishing is done almost exclusively in coastal waters by small, owner-operated vessels.

The Belgian fisheries catch since 1974 has been relatively stable, rising gradually to 51,000 t (Table 3). In 1978, Belgian fishermen landed 48,000 t of demersal fish, accounting for about 96 percent of the country's total catch. Cod is by far the predominant species fished; its 1978 landings totaled over 19,000 t, or nearly 40 percent of the total Belgian catch. Cod was the only

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species whose landings increased substantially in 1978. Most of the increase, however, was due to larger catches of young cod. EEC authorities believe that cod is over fished in this area, and that last year's increased landings cannot be sustained.

Domestic Market

The annual per capita consumption¹ of fishery products in Belgium is estimated at about 18 kg, near the west European yearly per capita average of 19 kg, but higher than the 15 kg per person in the United States. According to a recent unpublished report by NMFS marketing specialists who vis-

¹From "Fisheries of the United States, 1978," and based on live weight equivalents of fish consumed. Actual per capita consumption would be less, i.e., actual 1978 U.S. per capita consumption was about 7 kg.

ited western Europe, Belgian consumers tend to prefer salmon, herring, tuna, shrimp, mackerel, eels, crab, lobster, and mussels. None are fished extensively by Belgian fishermen (Table 3). Conversely, none of the species that are predominantly fished by the Belgian fleet (cod, sole, saithe, and plaice) are

Table 1.—Belgium's fisheries catch and imports and exports of edible fishery products, 1973-1978, in metric tons¹.

Year	Catch ²	Imports ³	Exports ³
1973	46,305t	105,800t	27,400t
1974	41,995	112,100	23,700
1975	43,027	101,400	21,500
1976	44,501	113,311	24,000
1977	45,366	112,129	22,200
1978	50,893	105,436	24,631

¹Belgium imported 32,000-34,000 t of fish meal annually during 1976-1978. Belgian fish meal exports rose from 2,000 t in 1976 to over 6,000 t in 1978.

²Live weight.

³Product weight.

Source: OECD Review of Fisheries.

Table 2.—Fishing fleets, 1976¹.

Country	Vessels	
	No.	GRT
United Kingdom	630	230,776
France	607	201,718
Germany	151	141,069
Italy	247	91,822
Netherlands	389	88,819
Denmark	358	69,009
Belgium	89	13,592
Ireland	27	13,592

¹Only vessels 100 GRT or more.

Source: Lloyd's Register of Shipping, 1976.

Table 3.—Belgium's fish catch by species and landed weight, 1974-1978.

Species	Catch (in metric tons)				
	1974	1975	1976	1977	1978
Fish					
Demersal					
Plaice	6,397	6,277	5,934	8,008	6,887
Sole	2,660	2,763	3,415	3,277	2,960
Cod	10,739	8,659	9,296	12,109	19,498
Haddock	1,883	2,921	3,699	3,264	2,146
Saithe	2,265	1,544	1,875	1,564	1,145
Whiting	3,087	3,266	3,145	3,537	3,535
Redfish	1,992	1,671	1,524	1,396	1,549
Skate	1,582	1,485	1,753	1,517	1,612
Others	7,679	8,382	7,806	7,474	8,726
Total	38,284	23,973	38,447	42,146	48,062
Pelagic					
Herring	603	2,371	1,445	57	1
Sprat	34	—	—	—	—
Others	183	185	322	66	26
Total	820	2,556	1,767	123	27
Total, fish	39,104	39,529	40,214	42,289	48,089
Shellfish					
Norway lobster					
lobster	426	434	448	474	854
Shrimp	1,322	1,617	2,093	1,236	591
Others	1,143	1,447	1,746	1,387	1,359
Total	2,891	3,498	4,287	3,097	2,804
Grand Total	41,995	43,027	44,501	45,366	50,893

among the products Belgians prefer. Therefore, Belgian fishery markets rely heavily on imports of fishery products to satisfy domestic demand.

Most fish are consumed fresh in Belgium, reflecting the relatively conservative consumption patterns of Belgian consumers. About 90 percent of the 1978 catch was marketed fresh, as well as about 27 percent of all imports (Table 4). Although consumption of frozen products accounted for only 6 percent of the domestic catch, it accounted for 24 percent of the much larger quantity of fish imported in 1978. Consumption of frozen products has been increasing in recent years, especially due to the growth of supermarket chains.

International Trade

Belgians rely heavily on international trade for their total fisheries supply. Imports, which supply approximately two-thirds of this total increase or decrease as the domestic catch falls or rises, respectively. Imports of edible fishery products in Belgium have fluctuated between 101,000 and 113,000 t annually since 1973 (Table 1). In addition, Belgium imported over 30,000 t annually of fish meal during 1976-78. The commodities imported in the largest quantities during 1977 were fish meal, mussels, cod, herring, and mackerel, while the most important Belgian fishery imports by value were

shrimp, oysters, and crab.

Belgium's most important suppliers of fishery commodities are other EEC member countries. In 1977, approximately 83 percent of total imports came from those countries, primarily the Netherlands and Denmark. U.S. exports to Belgium constitute only a small portion of total Belgian fishery imports. In 1977, the U.S. exported only 2,800 t of fishery products to Belgium, valued at \$12.6 million. Of this total, approximately half was frozen and canned salmon. The remainder consisted principally of fresh or chilled eels, canned crab, and fresh or frozen king crab (Table 5). Since most Belgian imports originate from other EEC countries, U.S. exports are usually competing with those countries' fishery exports. However, U.S. exports of salmon, by far the most important U.S. fishery export to Belgium, compete mainly with Canadian products.

Belgian exports of edible fishery products were 24,000 t in 1978, a slight increase over 1977 shipments of 22,000 tons. Fish meal exports remained stable at just over 6,000 t during this period. Most exports go to other EEC countries, especially France. Approximately one-third of all Belgian fishery exports consist of cod, whiting, and plaice. Belgian companies have no plans to promote export sales because of the country's small catch and large demand for fishery products.

In response to a number of complaints from European countries regarding the quality of U.S. fishery exports, NMFS officials met with government and industry representatives from several European countries in April 1978. The discussions covered a variety of problems dealing with U.S. fishery exports to western European countries. The main problem cited by the Belgian participants was that markets in that country require unusually high quality fishery products. The Belgian companies import nearly four times more salmon from Canada than from the United States (Table 5). According to the Belgians, the quality of the Canadian products is superior. A spokesman for the U.S. canned salmon industry has indicated, however, that a significant difference in quality between U.S. and Canadian canned salmon is unlikely, since both countries use the same varieties of salmon and the same processing techniques.

Another more general concern expressed by Belgian importers to NMFS officials at the April 1978 meeting was that little is known about the safety and quality standards of U.S. fishery commodities. NMFS representatives recommended that an effort be made to familiarize the appropriate government and corporate officials with the NMFS Fishery Inspection Service, since most of the European participants at the April meetings indicated that they were unaware of its existence. U.S. exporters are encouraged to utilize the NMFS Fishery Inspection Service.

Still another problem is that European importers are not well informed as to what species are available from U.S. exporters, and in what product form. NMFS representatives suggested that this problem could best be solved by increasing contacts between U.S. exporters and potential Belgian buyers.

Belgian health regulations require that U.S. fishery imports be accompanied by both of the following documents: A lot inspection certificate (NOAA form 89-803) and a certificate of wholesomeness (NOAA form 89-845). These certificates are required for imported fresh, chilled, frozen, or canned fish, but not for imports of marinated fish products or semi-preserved fish in sauces. (Source: IFR-79/83).

Table 4.—Belgian utilization of fish by commodity (in metric tons and percentage of total), 1978.

Product	Domestic catch		Imports		Total supply	
	Quantity	Percent	Quantity	Percent	Quantity	Percent
Fresh	40,841	90.1	37,200	26.7	78,041	42.3
Frozen	2,720	6.0	33,400	24.0	36,120	19.6
Canned	680	1.5	30,900	22.2	31,580	17.0
Cured	—	—	3,970	2.8	3,970	2.2
Fish meal	1,088	2.4	33,800	24.3	34,888	18.9
Total	45,329	100.0	139,270	100.0	184,599	100.0

Source: OECD Review of Fisheries, 1978.

Table 5.—Belgium's principal fishery imports from the United States, 1977.

Commodity	Total Belgian imports (t)	Major supplier		U.S. exports	
		Country	Quantity (t)	Quantity (t)	Value (US\$ 1,000)
Fresh, chilled eels	1,826	EEC	995	596	2,077
Frozen salmon	1,860	U.S.	930	930	4,920
Frozen king crab	n.a. ¹	n.a.	n.a.	220	2,873
Canned salmon	3,460	Canada	1,905	442	1,325
Canned crabs	1,142	EEC	274	271	3,149

¹n.a. = not available.

Source: Bulletin Mensuel du Commerce Extérieur de L'Union Economique Belgo-Luxembourgeoise, Dec. 1977, and Fisheries of the United States, 1977