

The British Salmon Market

The United Kingdom is an important fish consuming nation, with an annual per capita consumption of about 17.3 kg. Most Britons, however, have no tradition of eating Atlantic salmon, *Salmo salar*, both because of its expense and seasonal availability. Consumer surveys indicate, for example, that only about 1 in 10 British consumers purchase fresh, frozen, or smoked salmon, and those purchases are primarily made by more affluent and older consumers.

Salmon consumption, however, is increasing. The NMFS estimates that about 10,400 t of fresh and frozen salmon were available for consumption or smoking in the United Kingdom during 1983, a 50 percent increase over the 7,000 t available in 1980 (Table 1). No data exist to show in what product form that salmon was consumed. University of Stirling researchers estimate that about 70-75 percent of the fresh and frozen salmon available in 1980 was smoked¹. Actual smoked consumption in the United Kingdom was less because about 20 percent of the salmon smoked was subsequently exported. It is likely that the consumption levels of fresh salmon have increased sharply since 1980 because of the increased production in Scotland, but no data is available to substantiate this.

Fresh and Frozen

Salmon has traditionally been marketed primarily in the restaurant/catering sector. One estimate suggests that up to 70 percent of the fresh and frozen salmon consumed in the United Kingdom is prepared by the catering sector. Luxury restaurants generally insist on fresh

¹Canned products not considered because all are believed to be imported.

Atlantic salmon. In the past they have preferred wild-caught salmon, but farmed salmon are increasingly accepted. Most luxury restaurants still generally prefer to serve Scottish salmon because of its premium image with the British consumer. Managers of medium-priced restaurants are much more cost conscious and many use frozen Pacific salmon, *Oncorhynchus* spp., because it is cheaper. Some of those managers believe that few consumers would be able to tell the difference once the salmon was cooked. Many managers also mention the convenience of the frozen product and more stable seasonal prices. The remainder of the fresh and frozen salmon marketed to consumers is mostly sold by fishmongers and supermarket chains. Traditionally, fishmongers have been the most important outlet, but the current trend of adding fresh (or thawed frozen fish) counters is making increasing inroads.

The salmon price structure is extremely complex. Fresh Atlantic salmon prices vary according to the source, season, and size, with wild salmon commanding the highest prices. At the beginning of the year, wild salmon prices may be over £5 per kg higher than farmed prices (Tables 2-4). Prices fall during the summer, especially for the wild-caught salmon when the natural runs increase supplies. Farmed salmon show much greater price stability than the wild salmon (Fig. 1). In 1984, for example, large wild salmon varied from £5.51 to 11.02/kg while large farmed salmon only varied from £4.85 to 6.61 (Table 4). There are also substantial price differences as a result of size. Larger fresh fish, which can be used for banquets or parties, command as much as twice the price per kilogram than smaller fish command. The price structure may change in the future if

Table 1.—United Kingdom fresh and frozen salmon supply, 1983 (NMFS estimates).

Source	Product form	Quantity (t) ¹	
		1980	1983
Catch	Fresh	1,700 ²	1,500 ²
Cultured	Fresh	598	2,536
Imports	Fresh	333	1,524
Imports	Frozen	5,354	6,483
Exports	Fresh	-343	-1,110
Exports	Frozen	-596	-490
Total		7,046	10,443

¹Import and export data and Tables 5 and 9 have been adjusted to approximate live-weight equivalents.

²Estimated reported and illegal catch.

Table 2.—Salmon prices¹ on the London Billingsgate market, 1982.

Date ²		Price (£/kg)	
		Farmed ³	Wild Scottish ⁴
January	22	2.87-4.41	6.61-11.02
March	26	3.09-5.07	6.83- 9.37
April	8	3.09-5.18	5.51- 8.82
	30	3.09-5.51	5.73- 7.16
May	7	3.53-5.51	6.17- 7.72
	14	3.09-5.95	6.17- 7.72
June	11	2.20-5.95	5.51- 6.61
July	16	2.43-5.53	3.53- 5.29
	23	1.76-4.85	4.08- 5.51
	30	1.76-4.85	4.08- 5.51
August	6	1.98-5.29	3.97- 5.73
	13	1.76-5.07	4.85- 5.73
	27	1.76-5.73	4.18- 5.73
September	3	2.20-3.53	3.97- 5.51
	10	2.20-4.63	5.07- 5.51
	24	2.43-5.51	
October	1	3.31-6.17	
	8	3.09-5.95	
	15	1.98-5.07	
	22	3.09-5.51	
November	12	3.09-5.95	
December	3	2.76-6.06	
	22	3.31-6.17	

¹Price range is for salmon of different sizes; larger fish command the higher prices.

²Dates selected are Friday or the last working day of each week. Missing weeks are due to an incomplete set of the source publication, *Fish Trader*, or no quotation for that week.

³Both grilse and salmon.

⁴Excluding grilse.

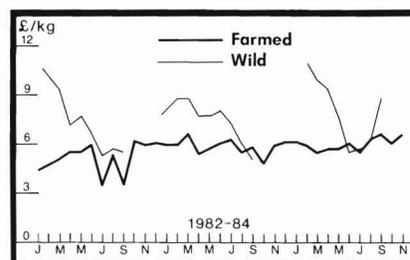


Figure 1.—U.K. prices on the London Billingsgate Market for large Scottish farmed and wild salmon, 1982-84.

Table 3.—Salmon prices¹ on the London Billingsgate market, 1983.

Date ²	Price (£/kg)	
	Farmed ³	Wild Scottish ⁴
January	7 3.09-5.95	
	14 3.09-5.95	
	21 2.65-5.95	
	28 2.65-5.95	
February	4 2.20-5.95	
	11 2.76-5.51	
	18 2.76-5.51	
	25 2.43-5.95	4.85-8.81
March	11 2.43-6.61	5.51-8.81
	18 2.65-6.61	4.41-7.72
April	15 2.98-5.40	5.95-7.72
	22 3.20-6.06	6.06-8.82
May	6 2.87-5.73	5.51-7.72
	13 2.76-5.73	6.06-8.27
	20 4.40-5.95	6.61-8.27
	27 2.65-6.06	4.74-8.27
June	3 3.31-6.06	5.51-8.05
	10 1.87-6.06	5.18-7.28
	17 3.31-5.95	4.96-7.72
	24 2.43-5.51	3.53-6.28
July	1 2.20-6.28	4.41-7.28
	8 2.20-5.51	4.19-7.05
	15 2.20-5.51	3.97-6.83
	22 2.43-5.51	3.74-6.83
	29 2.20-5.29	3.30-5.95
August	5 2.20-5.51	3.42-6.06
	12 2.20-5.07	3.53-5.73
	19 2.20-5.07	3.75-5.07
	26 2.20-4.96	3.75-5.07
September	2 1.87-5.84	3.53-5.07
	9 2.87-5.29	3.53-5.07
	16 2.65-5.73	4.85-5.73
	23 3.75-5.95	
	30 3.75-5.07	
October	7 3.53-4.85	
	14 2.65-5.73	
	21 2.20-5.73	
	28 1.76-5.73	
November	4 3.53-5.95	
	11 2.20-5.95	
	18 2.87-5.73	
	25 2.87-5.73	
December	2 2.87-6.17	

¹Price range is for salmon of different sizes; larger fish command the higher prices.

²Dates selected are Friday or the last working day of each week. Missing weeks are due to an incomplete set of the source publication, *Fish Trader*, or no quotation for that week.

³Both grilse and salmon.

⁴Excluding grilse.

growers succeed in expanding the market for smaller fish. Frozen salmon is also available, mostly imported Pacific salmon. There are also considerable price differences among the Pacific species, depending on the species and size. Generally, Pacific salmon is cheaper, but Scottish growers can undersell chinook, *O. tshawytscha*, and are close enough to the coho salmon, *O. kisutch*, to begin to compete if the price gap narrows much more.

At first, retailers were primarily interested in farmed salmon to extend the season beyond the time when wild salmon is available. The SSGA (Scottish Salmon Growers Association)

Table 4.—Salmon prices¹ on the London Billingsgate market, 1984.

Date ²	Price (£/kg)	
	Farmed ³	Wild Scottish ⁴
January	6 3.53-6.17	
	13 2.65-6.61	
	20 3.09-5.95	
February	3 3.09-5.95	
	10 3.09-5.95	8.82-11.02
	24 3.09-5.95	8.82-11.02
March	2 3.53-5.51	6.61- 9.92
	9 3.09-5.95	6.61- 9.92
	16 2.98-5.95	7.72-11.02
	30 2.87-4.85	6.61- 9.92
April	6 2.87-5.73	7.16- 9.36
	19 2.65-5.51	4.96- 7.16
May	11 2.43-5.73	4.41- 7.71
	18 2.43-5.51	4.41- 5.95
	25 2.43-5.51	4.41- 6.17
June	1 2.43-6.06	4.41- 5.51
	8 2.43-6.06	4.41- 6.17
	15 2.43-6.06	4.41- 6.61
	29 2.43-5.62	4.19- 5.95
July	6 3.53-5.51	4.41- 5.73
	13 2.20-5.73	4.63- 5.95
	27 2.20-5.73	5.07- 6.17
August	4 4.08-6.28	5.07- 6.17
	10 2.20-5.51	5.07- 6.17
	17 2.20-5.51	5.07- 6.17
	24 3.31-5.95	4.96- 6.61
	31 3.96-5.51	5.51- 7.72
September	14 3.53-6.61	6.61- 8.82
	21 3.31-6.06	
	28 3.31-5.95	
October	5 3.09-6.06	
	12 3.31-6.61	
	19 3.31-4.84	
November	3 3.31-6.61	
	10 2.65-7.06	
	16 3.31-5.70	

¹Price range is for salmon of different sizes; larger fish command the higher prices.

²Dates selected are Friday or the last working day of each week. Missing weeks are due to an incomplete set of the source publication, *Fish Trader*, or no quotation for that week.

³Both grilse and salmon.

⁴Excluding grilse.

hired a London public relations firm to run a Scottish Salmon Information Service in an effort to publicize the high quality of farmed salmon. The initial campaign cost £50,000. Growers hoped to reduce the price differential between wild and farmed salmon by making consumers more familiar with the high quality of the farmed product. Growers are convinced that their product is superior to wild-caught salmon. In some cases, fresh salmon marketed in the United Kingdom is not now identified as being wild or farmed. Some conservative bastions, however, such as the exclusive London department store Harrods² still insist on the distinction.

The concern among some growers

²Mention of trade names or commercial firms does not imply endorsement by the National Marine Fisheries Service, NOAA.

that increasing salmon supplies would depress prices has not materialized. Despite the fact that growers have increased production 300 percent since 1980, salmon prices in the United Kingdom have not declined (Fig. 1). Some companies report a greater seasonal stability in salmon prices. Marketing specialists believe that the increased production has enabled fishmongers to sell salmon at reasonable prices throughout the year, helping to stabilize the market. Expanding salmon production in Scotland may, in the long run, have little impact on the prices for salmon in the United Kingdom. Scottish production, even if it reaches 10,000 t by 1990, will be only a fraction of the expected Norwegian production of Atlantic salmon and an even smaller proportion of the total world production of Atlantic and Pacific salmon, which exceeds 500,000 t. Prices on the British market will probably be primarily determined by developments in Norway and other more important salmon producing countries.

Salmon growers have benefited from the resurging popularity of fresh fish in the United Kingdom. Many supermarkets and even some department stores have opened fresh fish counters where salmon is readily available to a much wider cross section of British consumers than was the case previously. Salmon marketed through Marks and Spencers, for example, is apparently reaching new customers that did not normally buy from fishmongers.

Smoked and Canned

The catering sector also dominates the marketing of smoked salmon, which is widely available in both luxury and medium-priced restaurants. The ease of handling and minimal preparation make it an attractive product. Most of the remaining product is sold in the delicatessen department of supermarkets. There is also a small mail-order trade. The premium-priced product is still Scottish wild salmon, although the quality of farmed salmon is increasingly narrowing the price gap. Imported Pacific salmon is also available for the price-

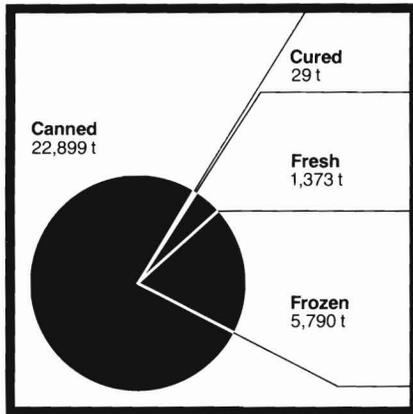


Figure 2.—United Kingdom salmon imports by commodity, 1983. Total is 30,000 t.

conscious consumer.

Most salmon consumed in the United Kingdom is canned, and all is imported. British consumers bought almost 23,000 t of canned salmon in 1983, about three times as much as the total of all fresh, frozen, and smoked purchases combined. Canned salmon is the cheapest salmon product regularly available to British consumers. Industry sources believe there is little competition between the fresh and the canned product. Canned consumption declined in 1982 as a result of a botulism incident in Belgium which received considerable publicity throughout Europe. Consumption recovered in 1983, but did not equal 1981 levels.

Trade

Imports

The United Kingdom imported over 30,000 t of salmon in 1983, valued at over \$140 million, more than a 35 percent increase over the 22,000 t imported in 1982. Nearly 23,000 t of the 1983 total, or over 75 percent, was canned salmon from the United States, Canada, and the Soviet Union (Fig. 2). The 1983 increase was primarily in canned products and probably reflects the recovering demand as consumers increased purchases after the botulism scare in 1982. Even though Scottish growers increased salmon production in 1983, imports of fresh salmon also increased. Fresh

Table 5.—U.K. salmon imports in metric tons by commodity and country, 1980-83.

Commodity and origin	Imports (t)			
	1980	1981	1982	1983
Fresh/chilled				
Norway	106	326	602	880
Ireland	154	127	156	440
France		2	2	23
Denmark	6	20		13
United States	16			8
Netherlands	2	25		1
Other	16	1	3	8
Subtotal¹	300	501	763	1,373
Frozen				
United States	2,601	2,983	3,100	3,293
Canada	1,115	1,484	1,059	1,266
Norway	157	344	382	556
Ireland	250	85	220	228
Faroe Islands	62	267	321	153
Denmark	252	265	237	129
France	5	4	26	67
Japan	234	74	18	33
Sweden	94	1	25	25
Belgium/Lux.	4	3		14
Netherlands	16		12	10
Chile		88	16	8
Germany	30	10	5	5
Greenland			20	3
Other	1	10	13	
Subtotal¹	4,821	5,618	5,454	5,790
Cured				
Denmark	11	11	9	13
Ireland	9	2	8	8
France	13		3	4
Other	25	1	12	3
Subtotal¹	58	15	34	29
Canned				
United States	15,375	15,263	7,195	12,658
Canada	7,565	10,014	6,572	8,642
Soviet Union	1,286	3,143	1,450	989
Netherlands	156	58	178	373
Belgium/Lux.	2		17	155
Iceland				61
Denmark		19		9
Ireland			219	4
South Korea		63	118	
Japan	37	593	32	
Germany		16		
Other	43	26	39	8
Subtotal¹	24,464	29,195	15,820	22,899
Grand Total¹	29,643	35,329	22,071	30,090

¹Totals may not agree due to rounding. Source: Eurostat trade statistics.

imports totaled almost 1,400 t in 1983, nearly double the 800 t imported in 1982. Most of the fresh salmon was imported from Norway, but some was also purchased from Ireland (Tables 5, 6).

The United States is the principal supplier of salmon to the British market. The United States supplied

Table 6.—U.K. salmon import values by commodity and country, 1980-83.

Commodity and origin	Imports (in U.S. \$1,000)			
	1980	1981	1982	1983
Fresh/chilled				
Norway	1,170	2,370	3,979	5,406
Ireland	1,193	715	774	1,832
France	3	15	14	131
Denmark	67	113	5	80
United States	79			36
Netherlands	14	119	9	6
Other	106	13	10	30
Subtotal¹	2,632	3,345	4,790	7,521
Frozen				
United States	11,285	10,789	11,160	9,695
Canada	6,076	6,988	4,765	4,450
Norway	1,717	2,759	2,818	3,694
Ireland	2,618	658	934	1,424
Faroe Islands	514	2,046	2,101	1,024
Denmark	1,912	1,674	1,382	740
France	35	20	119	304
Sweden	337	4	168	146
Japan	923	327	78	117
Belgium/Lux.	18	15		65
Netherlands	58	2	58	32
Germany	58	57	70	24
Chile		392	54	24
Greenland			119	17
Other	2	66	63	3
Subtotal¹	25,553	25,797	23,887	21,758
Cured				
Denmark	146	109	91	127
Ireland	212	32	94	101
France	393	6	47	17
Other	65	33	178	44
Subtotal¹	816	180	410	289
Canned				
United States	80,709	74,133	31,285	57,306
Canada	43,378	58,437	33,550	47,490
Soviet Union	4,813	8,252	6,877	4,330
Netherlands	672	250	951	1,804
Belgium/Lux.	4	2	87	893
Iceland				255
Denmark		77	29	50
Ireland			1,014	23
Korea (ROK)		282	555	
Japan	145	2,638	122	
Germany		68	2	
Other	178	99	95	78
Subtotal¹	129,900	144,239	74,568	112,229
Grand Total¹	158,901	173,561	103,655	141,797

¹Totals may not agree due to rounding. Source: Eurostat trade statistics.

over 55 percent of the frozen salmon, mostly headed and gutted, and 55 percent of the canned salmon imported in 1983 (Table 5). Canada is the United Kingdom's second leading supplier.

United States and Canadian exporters have been concerned about the impact of the increasing produc-

tion of farmed salmon on the British market for frozen salmon. Increasing Scottish production and imports of fresh salmon from Norway and Ireland, however, have not yet resulted in lower total imports of frozen salmon. Total frozen imports, however, were not affected by the increase in fresh imports during 1983. Purchases of frozen salmon totaled 5,800 t, slightly more than in 1982. Both the United States and Canada increased shipments to the United Kingdom in 1983. No one knows if this trend will continue, but most observers believe that frozen imports of Pacific salmon are unlikely to be greatly affected by Scottish production of fresh Atlantic salmon as long as there is a substantial price differential.

U.S. shipments of the higher-priced Pacific species such as chinook and sockeye, *O. nerka*, however, have been affected since 1981 (Table 7). Most buyers report that price is the major reason for selecting frozen salmon, although some also say that convenience is important.

Projecting future prices of farmed salmon is difficult. There seems to be little prospect for substantially reducing farmed salmon production costs. Feed is the major cost in culturing salmon and feed costs are largely determined by fishmeal prices. Continuing research on salmon culture may enable growers to make small reductions in production costs, but only a substantial reduction in fishmeal prices would enable growers to reduce prices to a point where they could more effectively compete with imported Pacific salmon. The continued growth of the Norwegian salmon culture industry, however, may depress prices. Any significant price decline would make farmed salmon more competitive with imported Pacific salmon.

U.S. and Canadian exporters are also concerned about the U.K. market for canned salmon. However, the increasing supplies of farmed salmon will probably not affect the canned salmon market. Canned salmon appeals to a different clientele than fresh salmon, and expanded Scottish pro-

Table 7.—U.S. frozen salmon¹ exports to the United Kingdom by species, 1980-83.

Species	U.S. exports (t)			
	1980	1981	1982	1983
Chum		838.9	1,068.8	1,500.0
Sockeye		513.0	140.6	108.9
Pink		1,068.2	286.3	243.4
Chinook		49.0	36.3	11.7
Other		1,381.0	1,373.1	1,331.4
Total	2,603.8	3,850.1	2,905.1	3,195.4

¹May include small quantities of fresh salmon.

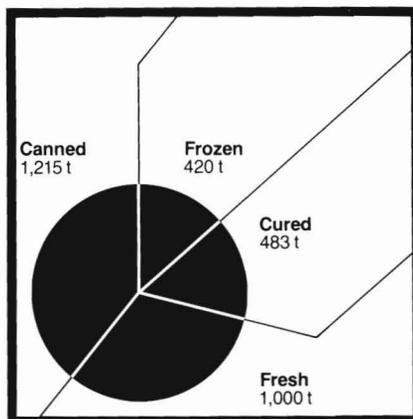


Figure 3.—United Kingdom salmon exports by commodity, 1983. Total is 3,118 t.

duction of fresh salmon is unlikely to affect U.S. canned salmon exports. U.S. exporters, however, are still concerned about depressed consumption levels in the United Kingdom and other European countries. Consumption in 1983 improved, but did not recover to pre-1982 levels. U.S. exporters do not yet know whether consumption in 1983 was still affected by the 1982 botulism incident or represents new, lower consumption patterns in the United Kingdom.

Exports

The United Kingdom imports much more salmon than it exports. British salmon exports are only a fraction of the large quantities imported and consumed domestically. The leading export commodity is canned salmon (Fig. 3), but this is believed to be primarily the re-export of canned salmon imported from other coun-

Table 8.—U.K. salmon exports by quantity, 1980-83.

Commodity and destination	Exports (t)			
	1980	1981	1982	1983
Fresh/chilled				
France	212	416	538	814
Netherlands	17	16	24	55
Belgium/Lux.	26	12	10	45
Ireland	29	34	33	41
Denmark	13			
Other	17	17	20	45
Subtotal ¹	314	495	625	1,000
Frozen				
France	316	206	299	171
Ireland	52	47	22	48
Denmark	30		111	35
Netherlands	11	9	49	34
Switzerland	7	7	12	29
Germany	3	42	7	24
Belgium/Lux.	7	22	42	23
Spain	39	16	7	18
Italy		4	14	8
South Africa	13	15		2
Other	59	23	22	28
Subtotal ¹	537	391	585	420
Cured				
United States	44	40	157	115
France	70	107	89	111
Italy	21	25	30	32
Australia	13	8	21	31
Switzerland	16	21	20	27
South Africa	31	25	17	24
Belgium/Lux.	28	16	23	23
Hong Kong	14	22	13	18
Ireland		14	30	16
U.A. Emirates	12	8	11	16
Other	85	44	54	70
Subtotal ¹	334	330	465	483
Canned				
Ireland	428	486	370	663
Netherlands	211	433	423	438
United States		46	40	55
Belgium/Lux.	9	9	32	18
Nigeria	23			
Other	72	40	34	41
Subtotal ¹	743	1,014	899	1,215
Grand Total¹	1,928	2,230	2,574	3,118

¹Totals may not agree due to rounding. Source: Eurostat trade statistics.

tries. Export shipments of fresh salmon increased sharply in 1983, as production of farmed salmon rose in Scotland. Shipments totaled 1,000 t in 1983, a 60 percent increase over the 625 t exported in 1982. The principal market for the fresh exports is France (Tables 8, 9). Some of the major ex-

Table 9.—U.K. salmon exports by value, 1980-83.

Commodity and Destination	Exports (in U.S. \$1,000)			
	1980	1981	1982	1983
Fresh/chilled				
France	2,001	2,957	3,504	4,706
Netherlands	202	137	169	360
Belgium/Lux.	287	119	72	304
Ireland	216	127	201	203
Denmark	167			
Other	262	159	240	424
Subtotal ¹	3,134	3,500	4,186	5,997
Frozen				
France	3,602	1,540	1,912	1,054
Ireland	302	303	138	232
Netherlands	72	77	312	174
Switzerland	60	50	67	164
Denmark	191		524	127
Belgium/Lux.	72	145	272	127
Germany	31	282	35	82
Spain	479	141	49	72
Italy		28	89	33
South Africa	149	605		17
Other	517	181	208	241
Subtotal ¹	5,475	3,352	3,606	2,323
Cured				
France	1,740	2,370	1,732	1,912
United States	1,149	907	1,462	1,890
Switzerland	372	452	361	463
Italy	540	499	141	457
South Africa	493	392	281	362
Australia	160	97	256	351
Belgium/Lux.	659	349	421	338
Hong Kong	323	363	256	255
U.A. Emirates	280	192	231	229
Ireland		160	272	106
Other	1,801	934	1,289	1,107
Subtotal ¹	7,517	6,715	6,702	7,470
Canned				
Ireland	1,820	1,934	1,322	2,205
Netherlands	1,114	1,643	1,568	1,466
United States		184	199	289
Belgium/Lux.	42	25	107	59
Nigeria	191			3
Other	420	281	189	233
Subtotal ¹	3,587	4,067	3,384	4,255
Grand Total¹	19,713	17,534	17,878	20,045

¹Totals may not agree due to rounding. Source: Eurostat trade statistics.

porters are now studying the possibility of exporting fish to the United States, and have already shipped samples. The United Kingdom already exports roughly similar quantities of smoked salmon to the United States and France. (Source: IFR-84/100-B.)

Fisheries Policy in the European Community

The European Community (EC) has a unique mechanism for making fisheries policy. The Community's centralized institutions, not the governments of the individual EC member-states, regulate EC fishermen. The 200-mile zones of all 10 EC members are combined to form a single jurisdiction. The member-states still maintain jurisdiction over waters within 12 miles (in some cases 6 miles) from their coasts. Also, the EC's jurisdiction does not apply to the Mediterranean waters of member countries.

The EC determines the total allowable catch (TAC) for the common zone as well as the amounts of the TAC that each member-state is allocated. Fishery agreements with non-EC countries and other regulations for fishing in EC waters are also handled by EC institutions.

Three of the Community's four centralized institutions, the European Commission, the Council of Ministers, and the European Parliament, participate in the formulation of EC fisheries law and policy (Fig. 1). The European Court of Justice, the remaining EC institution, ensures that member-states conform to Community law, but does not participate

in the policy-making process.

The Commission, the EC's main policy-making body, makes proposals for European laws, executes agreed-on policies, and acts as a mediator between the governments of the member-states. European laws may be specific measures or general outlines of policy, such as the Common Fisheries Policy. The laws are binding on all member states upon their ratification by the Council of Ministers.

The Commission is composed of 14 civil servants recruited from the EC member-states. The Members of the Commission are appointed to 4-year terms by agreement between the member-state governments to draft the Community's legislation. They cannot be removed except by Parliamentary censure. Each Member is responsible for formulating general policy on specific issues, such as agriculture, foreign policy, industrial policy, etc. At present, Giorgios Con-togeorgis of Greece is the Commission Member responsible for fisheries (plus transport and tourism).

The Commission Members are not specialists on the specific issues for which they have responsibilities, and they do not handle the details of legislative proposals. Specific issues are addressed by the 23 Directorates General of the Commission, each of which covers a different issue.

Directorate General XIV (DG XIV) is in charge of fisheries and plays the most important role in the making of EC fishery policies. DG XIV, through the European Commission, submits detailed proposals for all EC fishery regulations to the Council of Ministers for approval. Besides proposals that deal with specific issues, memoranda on general guidelines may also be submitted to the Council.

DG XIV, currently headed by Eamonn Gallagher of Ireland, is divided into three main sections: Directorate A—International Questions, Directorate B—Markets and Internal Resources, and Directorate C—Structures, Aids, and National Measures (Fig. 2).

The Commission has also established a number of special advisory

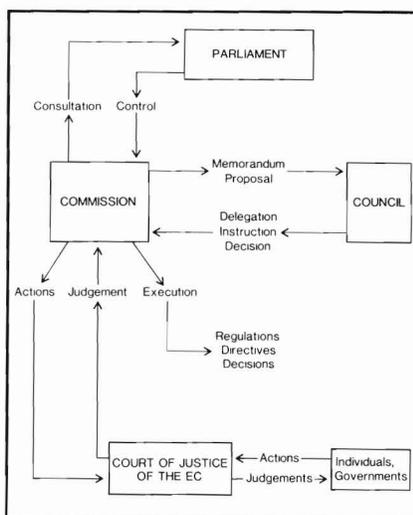


Figure 1.—The institutions of the European Community.

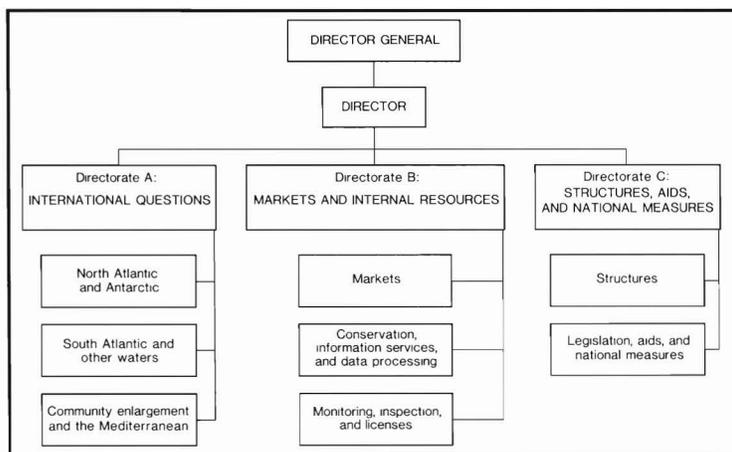


Figure 2. — Organizational chart of the Directorate General XIV: Fisheries of the European Community.

committees composed of representatives of industry, academic, professional, and economic interests. These committees advise the Commission in drafting legislation on issues which affect specific sectors of the Community. There are currently five such committees currently covering fisheries: 1) Advisory Committee on Fishery Products (established in 1973), 2) Joint Committee on Social Problems in Marine Fisheries (1974), 3) Scientific and Technical Committee on Fisheries (1979), 4) Management Committee for Fishery Products (1976), and 5) Standing Committee on the Fishing Industry (1976).

The European Parliament

The European Parliament, a relatively new body, advises the Commission on legislation. Members of the European Parliament are elected by the citizens of the member-states which they represent. There are 434 European Members of Parliament (Euro-MP's): United Kingdom (81), Italy (81), France (81), Federal Republic of Germany (81), the Netherlands (25), Belgium (24), Greece (24), Denmark (16), Ireland (15), and Luxembourg (6). The Members do not sit in Parliament according to country, but rather by political affiliation (Socialists, Christian-Democrats, Conservatives, Communists, Liberals, etc.).

The Parliament has mainly a con-

sultative and advisory role. Legislation proposed by the Commission must first be sent to the Parliament for recommendations before the Council of Ministers can vote on it. The Parliament also prepares reports on various issues which the Commission must review before making legislation. Euro-MP's also present oral questions on specific issues to the Commission and monitor the status of legislative proposals which could affect their constituencies. The Parliament, however, has no formal legislative power and can only block budgetary legislation.

Since the adoption of the Common Fisheries Policy (CFP) in January 1983, the Parliament has been trying to obtain more responsibility in its management. The Parliament has asked the EC Commission to consult with it on all fishery matters related to conservation, technical measures, the fixing of TAC's and quotas, supervisory regulations, and annual agreements with third countries. The Parliament earlier called for the establishment of a separate Parliamentary committee on fisheries since fishery matters are currently handled by the Parliament's agricultural committee.

In July 1984, however, the Parliament voted against the separate fisheries committee. Observers believe that the separate fisheries committee was not approved because it is

politically advantageous for fisheries to be under the agricultural committee, which is more powerful and has a considerably larger budget. The Parliament's fisheries working group, chaired by Bob Battersby of the United Kingdom, thus remains as a subcommittee of the agriculture committee.

The Council of Ministers

The Council of Ministers is composed of cabinet-level ministers from the 10 EC member-states who approve legislation drafted by the Commission. The Ministers make final decisions on all EC legislation and act on behalf of their countries' national interests. The Council members vary, depending on the nature of the legislation before them and on who the member-states decide to send to the meetings.

When fisheries legislation is debated, the Council is usually composed of the fisheries or agriculture ministers of the member states. In some cases, however, important fishery issues are handled by other ministers who may have a greater interest in the legislation. For instance, in February 1984, foreign ministers of EC member-states, not the fishery ministers, decided the terms of Greenland's withdrawal from the Community. While the issue dealt mainly with fisheries, foreign ministers participated in the Council because of Greenland's strategic importance to the Community.

The Council makes the final decisions on Commission proposals and memoranda but may amend or change the proposed legislation by an unanimous vote. Since Commission Members are constantly in touch with the member-states and know what legislation is politically acceptable to each country, Commission proposals generally stand a good chance of passage by the Council of Ministers. Several Council decisions in the past, however, have been hard-fought affairs; the debate over the Common Fisheries Policy lasted nearly 2 years before all Council members could agree on the final version. (Source: IFR-84/41R.)