



Danish Import Promotion Office
for Products from Developing Countries



Fish & Crustaceans

A survey of the market for fish & crustaceans in Denmark

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DIPO

The Danish import promotion office DIPO operates in accordance with an agreement between the Danish Chamber of Commerce and The Danish International Development Assistance, DANIDA. The office is situated in the Chamber of Commerce but is financed by DANIDA.

The aim of DIPO is to provide service to exporters in the developing countries in their endeavors to enter the Danish market. The office can assist with market information and with establishing contacts to Danish importers. Business offers are published free of charge at DIPO's website (www.dipo.dk) and in DIPO's newsletter *UlandsHandel*, which is published five times annually and distributed to Danish importers.

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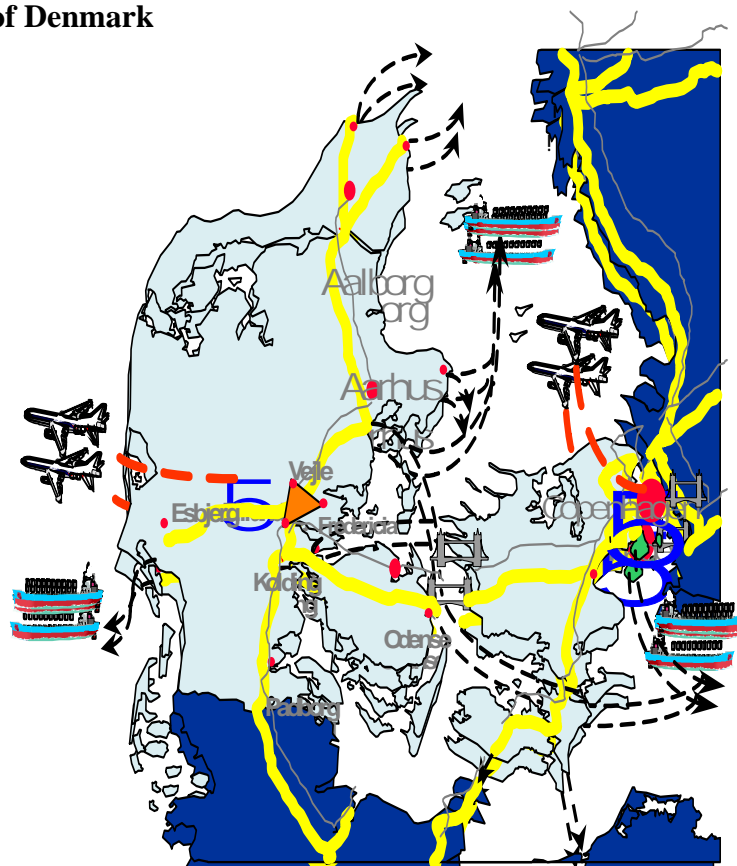
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Map of Denmark



The European Union:

- Austria
- Belgium
- Denmark
- Finland
- France
- Germany
- Great Britain
- Greece
- Ireland
- Italy
- Luxemburg
- Netherlands
- Portugal
- Spain
- Sweden

Facts about Denmark

Area: 43,095 sq. kilometers
Population: 5.3 million
Capital: Copenhagen: 1.5 million inhabitants
Language: Danish
Government: Democracy
GDP (2000): DKK 1,296,136 million
GDP per capita (2000): DKK 241,816
Currency: Krone, DKK (1DKK = 100 øre)
 Denmark has not adopted the common currency EURO
Exchange Rate, US\$: 1US\$ = 8.61 DKK (February 1st 2002)
Time Zone: Central European Time Zone
 One hour ahead of GMT
Business Hours: Monday to Friday
 9.00 a.m. to 4.00 p.m.
Weight and Measures: The Metric System
Climate: 4 seasons: spring, summer, autumn, and winter
Member of International Organizations:
 EU, NATO, WTO, OECD, UN

Other Large Cities:

Aarhus: 500,000 inhabitants
 Odense: 200,000 inhabitants
 Aalborg: 160,000 inhabitants

Distances:

Copenhagen – Aarhus: 300 kilometers
 Copenhagen – Odense: 165 kilometers
 Copenhagen – Aalborg: 400 kilometers

Public Holidays, 2002:

New Year's Day	January 1 st
Maundy Thursday	March 28 th
Good Friday	March 29 th
Easter Monday	April 1 st
Prayer Day	April 26 th
Ascension Day	May 9 th
Whitsunday	May 19 th +20 th
Constitution Day	June 5 th
Christmas Eve	December 24 th
Christmas Day	December 25 th
Boxing Day	December 26 th
New Year's Eve	December 31 st

1. Introduction to Denmark

Membership of the EU

As a member of the EU, Denmark enjoys open market access to the other EU countries. Within the EU a Customs Union has been formed, allowing goods to move freely across borders without customs or taxes. For non-EU countries, however, specific rules apply (please refer to chapter 6 “Customs Duty and Import Regulations”).

Denmark also enjoys membership of international organizations such as the OECD and the WTO and is traditionally striving to actively remove obstacles to free trade within these frameworks.

General Trade Figures

The Danish economy is highly dependent on trade with other countries due to the country's size and location in one of the world's most dynamic regions.

Approximately two third of the Danish foreign trade is carried out with other EU countries. With regards to total imports to Denmark (only goods) in 2000, imports from other EU countries accounted for 82.3 percent. Asia accounted for 10.4 percent, the Americas for 6.8 percent, and only 0.5 percent of total imports came from Africa.

Industrial Pattern

Small and medium sized companies characterize the Danish industry. Compared to other industrialized countries, even the largest Danish companies are, with few exceptions, only medium sized.

Except for heavy industries such as mining, car and plane industries etc., practically all business sectors exist in Denmark. Due to an increasing specialization, division of tasks, and seasonality, however, a large range of products is also imported to Denmark. The Danish industry is mainly constituted of light manufacturing and reprocessing, and production is often characterized by a high degree of specialization in a particular, well-defined field. Products, which have made Denmark known internationally, are primarily meat and dairy products, pharmaceuticals, furniture, beer, electronic products and advanced metal industry.

Infrastructure

The Danish infrastructure is highly developed. The road network is of high standard, the railway system connects almost every town with more than 10,000 inhabitants, there are many, easily accessible harbors, and Denmark has several domestic airports. Copenhagen Airport is the largest airport in Northern Europe being served by most international carriers. Ferries, tunnels and a number of bridges interconnect the islands of Denmark and, furthermore, a bridge connects Denmark to Sweden (see map on page 3).

Means of communication are excellent as well. The postal service is efficient and reliable, and telephone, fax service and email are available throughout the country.

Climate

The Danish climate consists of four seasons: spring, summer, autumn and winter. The average temperature in July ranges from 12 to 20 degrees Celsius, opposed to the average temperature of January, which ranges from -3 to +2 degrees Celsius. Some snow can be expected from December to March, and rainfall is common with about 700 mm precipitation annually.

Standard of Living

With a high GDP per capita as well as a highly prioritized welfare system, the Danish standard of living is among the highest in the world. Income is evenly distributed among the population and normally, both men and women work full time.

Households

Of total household consumption, Danes spend approximately 11.5 percent on food. On average, Danes consume 170 grams of fish per week, which is equivalent to a yearly consumption of 9-10 kg of fish per person (In comparison, every Swede consume 30 kg per year, and in Iceland the yearly consumption of fish products is 45 kg per person). However, the consumption of fish products in Denmark has risen within the last five years. National campaigns promoting fish products have affected positively the consumption of fish products and furthermore, supermarkets experience increasing sales of ready meals containing fish.

Danes primarily consume fish, which inhabit the oceans close to Denmark. However, in recent years, Danish retailers have experienced that the Danish consumer is increasingly willing to try foreign and -to Danes-unknown species of fish and crustaceans.

2. Market Definition

In this market brief the definition of fish and crustaceans will be based on products within the category SITC 03 and the equivalent CN codes 03.02 – 03.07 and 16.04 – 16.05. The application of two different classification systems is due to statistical survey methods. On an aggregate country level the SITC categories are more elaborate, while on a product level the CN codes are more detailed. Therefore, the SITC categorization will be used when analyzing market size and when comparing different countries' exports to Denmark, whereas the CN codes will be applied when analyzing exports of specific products to Denmark, as well as when describing customs duty and import regulations.

SITC (Standard International Trade Classification) is the UN classification system, and 03 refers to the category of fish, shellfish, mollusks, and Aquatic invertebrates and preparations thereof.

The Combined Nomenclature (CN) is the 8-digit trade classification system used by the European Union for tariff purposes. The system is directly linked to the 6-digit Harmonized System (HS) used by the vast majority of trading nations throughout the world. When exporting to countries within the EU, it is necessary to state the exact CN number. The CN 03 and CN 16 codes can be subdivided into 8-digit specific groupings depending on type and format of the fish product. When applying sub-categories, it will be stated clearly by the specific CN number. The CN codes that will be used in this market brief are:

- ▶ 03.02: Fish, fresh or chilled
- ▶ 03.03: Fish, frozen
- ▶ 03.04: Filet or other fish meat, fresh, chilled or frozen
- ▶ 03.05: Fish, dried or salted
- ▶ 03.06: Shellfish
- ▶ 03.07: Mollusks
- ▶ 16.04: Fish, prepared or preserved
- ▶ 16.05: Shellfish and mollusks, prepared or preserved

The market brief will furthermore focus on groups of fish and crustaceans relevant for developing countries. These groups are: tuna, salmon, crab and lobster, shrimps and prawns, mollusks, and cephalopods. The CN sub-categories belonging to these groups will be stated clearly when applied.

More information on the Combined Nomenclature is available on www.hmce.co.uk

3. Market Analysis

Market size

Due to statistical survey methods it is not possible to make an accurate calculation of the size of the Danish market for fish and crustaceans. The data retrievable on Denmark's own landings only concern fish that have not been undergoing any form of processing, as opposed to data on imports and exports, which only account for processed products. This makes the data unsuitable for comparison, since the value of unprocessed products only represents a fraction compared to products, which have been undergoing value-adding processes and may have passed through several intermediaries. Nonetheless, in line with the focus of this market brief, the most important data concern imports, and from table 3.1 trends can be derived on the size and development of the Danish market for fish and crustaceans. Imports have increased continuously since 1998, which corresponds well with a growing interest in fish and crustaceans supported by increased marketing efforts and a positive health image related to fish products. However, besides being a small market in terms of population, Danes are still among the Europeans with the lowest consumption of fish products (European Union, 2000).

Table 3.1

Imports and Exports of Fish and Crustaceans from 1998 to 2001 (1,000 DKK)				
	1998	1999	2000	2001
Imports	8,104,841	8,260,403	9,369,838	10,121,333
Exports	14,066,563	14,414,181	15,157,445	16,759,478

Source: Statistics of Denmark, 2002

Imports

Although being among the largest fishing nations in Europe, the imports of fish and crustaceans to Denmark are considerable. Fish products are imported either because of their price competitiveness compared to Danish products, because of limited access to certain types of fish due to Denmark's geographical location, or they are imported for value-adding processing and re-export to other countries. The following table presents the countries that constitute close to all imports to Denmark.

Table 3.2

Top Exporting Countries to the Danish Market from 1999 – 2001 (DKK 1000)				
Country	1999	2000	2001	Share of imports In percent
Norway	1,942,487	2,301,647	2,108,898	21
Greenland	1,635,266	1,819,578	1,819,578	18
Faeroe Islands	877,974	1,008,193	1,336,711	13
Russia	458,262	722,239	833,195	8
Sweden	620,867	643,074	729,045	7
Canada	566,551	650,301	601,506	6
Germany	326,365	291,706	415,770	4
UK	195,716	249,230	322,113	3
Iceland	324,612	279,916	256,620	3
Netherlands	186,298	240,350	244,515	2
Chile	68,619	73,074	197,190	2
China	106,754	116,239	165,437	2
Poland	123,705	132,490	148,205	1

USA	126,424	63,368	137,036	1
France	51,101	41,962	88,606	1
Thailand	85,217	81,733	82,458	1
Lithuania	40,527	58,062	71,398	1
Spain	37,466	58,615	56,791	1
Malaysia	44,406	41,368	51,155	1
Indonesia	38,046	41,906	47,019	0
Estonia	78,602	50,323	37,892	0
Total	7,935,265	8,965,374	9,751,138	96
All countries	8,260,403	9,369,838	10,121,333	100
Percentage of Total	96.1	95.7	96.3	

Source: Statistics of Denmark, 2002

The above-mentioned countries cover more than 96 percent of the imports to Denmark while the last four percent can be divided up on multiple smaller exporters with a market share that can only be calculated in per thousands. Besides volatility in exports of individual countries, the countries on the list have shown a rather stable dominance over the market for imports in the three-year period. Although the market share has been stable, the value of the imports has increased over the three years.

Denmark's neighbors: Norway, Greenland, Faeroe Islands, Sweden, and Iceland have a market share of more than 50 percent. Eastern European countries such as Russia and Poland enjoy increasingly larger exports to Denmark. The list also contains a number of developing countries: Chile, China, Thailand, Malaysia, and Indonesia. However, these main exporting developing countries together do not account for more than five percent of total imports.

This market brief will narrow the focus to imports from developing countries only, instead of dealing with the whole market as such. Furthermore, due to a marked difference between the types of fish and crustaceans imported from developing countries and those of the largest exporters mentioned above, only types relevant to developing countries will be subject to further investigation. Thus, the following table presents the developing countries with largest exports of fish and crustaceans to Denmark from 1999 to 2001.

Table 3.3

Developing Countries with Largest Exports of Fish Products to Denmark (1,000 DKK)					
Country	1999	2000	2001	Percentage change 1999-2001	Percentage of total imports 2001
Chile	68,619	73,074	197,190	187.37	1.95
China	106,754	116,239	165,437	54.97	1.63
Thailand	85,217	81,733	82,458	-3.24	0.81
Malaysia	44,406	41,368	51,155	15.20	0.51
Indonesia	38,046	41,906	47,019	23.58	0.46
Bangladesh	7,779	19,218	28,836	270.69	0.28
Colombia	21,298	21,637	25,387	19.20	0.25
Madagascar	17,441	17,828	18,313	5.00	0.18
Vietnam	7,029	6,334	14,813	110.74	0.15
India	14,688	9,191	12,778	-13.00	0.13
Seychelles	243	9,690	6,767	2684.77	0.07
Philippines	6,325	5,304	4,590	-27.43	0.05
Ivory Coast	-	1,194	4,164	-	0.04
Papua New Guinea	1,287	187	2,151	67.13	0.02
Argentina	3,817	2,055	1,770	-53.63	0.02

Brazil	1,785	1,468	1,478	-17.20	0.01
Total	424,734	448,426	664,306	56.41	6.56
Total imports (All countries)	8,260,403	9,369,838	1,0121,333		100
Percentage share of total imports	5.14	4.79	6.56		

- No data available

Source: Statistics of Denmark, 2002

The market for fish and crustaceans from developing countries has grown increasingly larger in the three-year period not only in terms of value but also in terms of a small increase in the share of total imports. On an individual country level, there have been great fluctuations from a 27 percent decline of the Philippines to an increase of 2685 percent of the Seychelles. The immense increase in the imports from the Seychelles is caused by an increasing demand for their tuna and bonito. Fluctuations can often be related to increases in demand for certain types of fish. For instance, changes in prices on popular local types of fish will lead to the search for substitutes. Chile, for example, has witnessed a tremendous rise in the demand for Pacific salmon, mainly due to increasing prices on Atlantic salmon. Fluctuations may also be caused by lack of compliance with EU regulations, which may prohibit the import of fish from certain areas. Recently, the finding of chloramphenicol in some fish products (especially in crayfish and shrimps) from Asian countries such as China, Thailand, Vietnam and Bangladesh has restricted the access to the EU. For more information on regulations, see chapter 6.

As mentioned, Chile has experienced an almost vertical increase in exports of salmon, making it the largest exporter among the developing countries. Besides salmon, Chile mainly exports shrimps, and mussels. China is second and has witnessed a steady but fast growth in exports. China is the developing country exporting the greatest variety of fish and crustaceans; among these are crabs, shrimps, salmon, cod and octopus. Other South East Asian countries exporting to Denmark are Thailand, Malaysia, Indonesia, Bangladesh, Vietnam, Papua New Guinea, and the Philippines. The main export articles from these countries are tuna, shrimps and, to some extent, octopus. The two African countries Madagascar and the Ivory Coast, which are also represented on the list, solely export tuna. Of the South American countries, besides Chile, Columbia exports tuna, Argentina mainly supplies hake, while Brazil exports monkfish.

Fish Products

Close to all exports of fish and crustaceans from developing countries to Denmark are included in the six categories: tuna, salmon, crab and lobster, shrimps and prawns, mollusks, and cephalopods. This section will treat each of these categories separately. Each category can be divided into multiple subcategories; for instance, tuna contains more than 25 subcategories in the CN classification systems. Therefore, only subcategories relevant for developing countries will be investigated in this market brief. For each category, it will be stated clearly which CN categories are subject for analysis.

Salmon

Salmon constitutes the leading product group exported to Denmark by developing countries. The Danish market for salmon is growing rapidly making it increasingly attractive for developing countries. All salmon imported to Denmark from these countries are included in the following four CN categories.

Table 3.4

CN Number	Description
03031000	Frozen Pacific salmon 'oncorhynchus'
03032200	Frozen Atlantic salmon 'salmo salar' and Danube salmon 'hucho hucho'
03041013	Fresh or chilled fillets of Pacific salmon 'oncorhynchus'. Atlantic salmon 'salmo salar' and Danube salmon

	'hucho hucho'
03042013	Frozen fillets of Pacific salmon 'oncorhynchus', Atlantic salmon 'salmo salar' and Danube salmon 'hucho hucho'

Source: Statistics of Denmark, 2002

Developing countries exporting salmon to Denmark are: Chile, China and Thailand. These countries mainly supply salmon in frozen format.

Table 3.5 presents the development of the market for salmon. In the period 1999-2001 there have been significant progresses in the market for salmon. The market has become increasingly larger with an increase in exports of almost three million kilos. This is due to the increased marketing of fish products and the easier access to salmon, especially in supermarkets. Another development concerns the developing countries' market share, which has increased from 7 to 37 percent. This owes especially to the fact that developing countries are competitive on price when compared to traditional suppliers such as Norway and Canada. Chile is the country exporting most salmon to Denmark. In 1999 Chile was only ranked no. five exporting 725,517 kilos, whereas by 2001 Chile was the market leader with exports amounting to 5,521,842 kilos. Chile thereby surpassed Norway, the USA, and the Faeroe Islands. The main reasons for this success stem from the fact that EU is running a case against Norway, and that Pacific Salmon is a price competitive substitute to North Atlantic salmon. Apart from Chile, China and Thailand are particularly strong in Pacific salmon. Among the developing countries China was the second largest exporter with 103,566 kilos, while Thailand accounted for 17,250 kilos in 2001.

Table 3.5

The Exports to Denmark of Salmon* from 1999 to 2001, in kilos			
	1999	2000	2001
Total exports of salmon to Denmark (in kilos)	12,520,027	10,021,214	15,068,413
Developing countries' exports of salmon to Denmark (in kilos)	825,762	1,261,519	5,642,658
Developing countries' share of total exports of salmon to Denmark (in percent)	7	13	37

* CN categories: 03031000, 03032200, 03041013, and 03042013

Source: Statistics of Denmark

Tuna

Tuna is the second leading product group (in kilos) exported to Denmark by developing countries. Developing countries only supply tuna in frozen or canned format, while fresh and chilled tuna most often come from countries geographically closer to Denmark. The types of tuna exported to Denmark from developing countries are yellowfin, albacore, longfin, skipjack, and bonito. All tuna from developing countries are included in the five CN categories presented in the table below.

Table 3.6

CN Number	Description
03034390	Frozen skipjack or stripe-bellied bonito (excl. for industrial processing or preservation)
03042045	Frozen fillets of tuna 'thunnus' and of fish of the genus 'euthynnus'
16041411	Prepared or preserved tunas and skipjack, whole or in pieces, in vegetable oil (excl. minced)
16041418	Tunas and skipjack, prepared or preserved (excl. minced and loins and such products in vegetable oil)
16042070	Prepared or preserved tunas, skipjack or other fish of genus euthynnus (excl. whole or in pieces)

Source: Statistics of Denmark, 2002

The developing countries exporting tuna to Denmark are: Thailand, Indonesia, Columbia, Madagascar, Vietnam, India, Seychelles, Ivory Coast, Papua New Guinea, Philippines, Mauritius, Ghana, Senegal, and Ecuador. In 2001 Colombia was the main exporter accounting for 1,365,003 kilos of tuna exports to Denmark, followed by Thailand exporting 1,104,089 kilos, and ranking third was Madagascar with 1,078,335 kilos.

Table 3.7 presents the development in the market for tuna (yellowfin, albacore, longfin, skipjack, and bonito) from 1999 to 2001. The fact that these species are very important for developing countries can also be seen from their market share of 86 percent. The table shows that the market for tuna has increased steadily in the three-year period. Hence, although the market share of the developing countries has remained stable, developing countries have slowly increased their exports.

Table 3.7

Exports to Denmark of Tuna and Bonito* from 1999 to 2001, in kilos

	1999	2000	2001
Total exports of tuna and bonito to Denmark (in kilos)	6,148,376	6,304,240	6,427,955
Developing countries' exports of tuna and bonito to Denmark (in kilos)	5,336,177	5,445,161	5,527,783
Share of total exports of tuna and bonito to Denmark (in percent)	87	86	86

* CN categories: 03034390, 03042045, 16041411, 16041418, and 16042070

Source: Statistics of Denmark

Crab and Lobster

The market for crab and lobster has been growing rapidly in the last three years. While countries geographically close to Denmark export fresh or chilled crab and lobster, developing countries mainly export them as prepared or preserved. The exports to Denmark from developing countries are included in the three CN categories in table 3.8.

Table 3.8

CN Number	Description
03061490	Frozen crabs, whether in shell or not, incl. crabs in shell, cooked by steaming or by boiling in water (excl. 'paralithodes camchaticus, chionoecetes', 'callinectes sapidus' and 'cancer pagurus')
16051000	Crab, prepared or preserved
16053090	Lobster, prepared or preserved (excl. lobster meat, cooked, for the manufacture of lobster butter or of lobster pastes, pates, soups or sauces)

Source: Statistics of Denmark, 2002

In 1999 the developing countries exporting crab and lobster to Denmark consisted of China, Thailand, Vietnam, Chile, Philippines, and Malaysia. However, by 2001 only China, Thailand, and Vietnam were left.

Table 3.9 presents the development in the market for crab and lobster. Of the exports of crab and lobster included in the three CN categories, Greenland was by far the country exporting most in 2001 with 417,136 kilos, followed by China with 212,916 kilos, while Thailand was on a third place with 26,415 kilos. The previous year China, Thailand and Malaysia were the three most exporting countries, but in only one year Greenland increased the export with more than 90 percent. This caused a lowering of the developing countries' market share from 73 percent in 2000 to only 35 percent in 2001. This does not, however, mean that the market for developing countries has not developed positively in the three-year period. During this

period the market went from 103,000 kilos to 250,000 kilos in 2001, which was an increase of more than 150 percent. The market for crab and lobster therefore represents great opportunities for developing countries.

Table 3.9

Exports to Denmark of Crab and Lobster* from 1999 to 2001, in kilos			
	1999	2000	2001
Total exports of crab and lobster to Denmark (in kilos)	175,221	251,898	716,406
Developing countries' exports of crab and lobster to Denmark (in kilos)	91,599	182,956	249,751
Share of total exports of crab and lobster to Denmark (in percent)	59	73	35

*CN categories: 03061490, 16051000, and 16053090

Source: Statistics of Denmark

Shrimps and Prawns

Shrimps and prawns represent a very large product group in the imports to Denmark. Even though, developing countries only cover a small percentage of total exports, it is still a market half the size of tuna and salmon. The CN categories relevant for developing countries are listed below.

Table 3.10

CN Number	Description
03061310	Frozen shrimps and prawns of the pandalidae family, whether in shell or not, incl. shrimps and prawns in shell, cooked by steaming or by boiling in water.
03061350	Frozen shrimps of the genus 'penaeus', whether in shell or not, incl. shrimps in shell, cooked by steaming or by boiling in water.
03061380	Frozen shrimps and prawns, whether in shell or not, incl. shrimps and prawns in shell, cooked by steaming or by boiling in water (excl. 'pandalidae', 'crangnon', deepwater rose shrimps 'parape Naeus longirostris' and shrimps of the genus 'penaeus').
16052010	Shrimps and prawns, prepared or preserved, in airtight containers.
16052091	Shrimps and prawns, prepared or preserved, in immediate packings of a net content of < 2 kilos (excl. shrimps and prawns in airtight containers).
16052099	Shrimps and prawns, prepared or preserved, in immediate packings of a net content of > 2 kilos (excl. shrimps and prawns in airtight containers).

Source: Statistics of Denmark, 2002

Greenland, Canada, Iceland, the Faeroe Islands, and Norway are the largest exporters of shrimps and prawns to Denmark. Greenland had the largest share in 2001 exporting 46,951,868 kilos, which was fifteen times more than exports from all developing countries put together. The developing countries only account for three percent of total exports, and the share has been relatively constant from 1999 to 2001. The developing countries exporting to Denmark are: Bangladesh, Chile, China, India, Indonesia, Malaysia, Thailand, and Vietnam. Malaysia was the country exporting most with 1,047,110 kilos in 2001, followed by Indonesia with 476,053 kilos. From the table it is difficult to assess whether or not the market for shrimps and prawns is growing, since a large decline in 2000 has disrupted a possible trend.

Table 3.11

Exports to Denmark of Shrimps and Prawns* from 1999 to 2001, in kilos			
	1999	2000	2001
Total exports of shrimps and prawns to Denmark (in kilos)	96,100,917	90,421,711	103,528,590
Developing countries' exports of shrimps and prawns to Denmark (in kilos)	3,056,537	2,187,900	2,809,327
Developing countries' share of total exports of shrimps and prawns to Denmark (in percent)	3	2	3

*CN categories: 03061310, 03061350, 03061380, 16052010, 16052091, 16052099

Source: Statistics of Denmark, 2002

Mollusks

Although developing countries' share of exports of Mollusks (oysters, scallops, and mussels) to Denmark is rather low, their share is growing and so is the total market. Developing countries export mollusks in all types of format, except from fresh because of the geographical distance. Mollusks exported to Denmark from developing countries are all included in the five CN categories presented in the following table.

Table 3.12

CN Number	Description
03072990	Scallops, incl. queen scallops, of the generan pecten, chlamys or placopecten, frozen. dried, salted or in brine, with or without shell (excl. coquilles St. Jacques 'pecten maximus')
03073910	Mussels 'mytilus', frozen, dried, salted or in brine, with or without shell
03079913	Striped venus and other 'veneridae', with or without shell, frozen
16059011	Mussels of the species mytilus and of the species perna, prepared or preserved, in airtight containers
16059019	Mussels of the species mytilus and of the species perna, prepared or preserved (excl. mussels in airtight containers)

Source: Statistics of Denmark, 2002

The country exporting most mollusks to Denmark in 2001 was Greenland with 274,050 kilos followed by France, United Kingdom, and Spain. While developing countries generally export to a wide variety of EU countries, only Thailand, Chile and China export to Denmark. Thailand exported 47,055 kilos, followed by Chile with 38,285 kilos and China with 12,000 kilos. As table 3.13 shows the export from developing countries has more than doubled since 1999, which makes the market increasingly interesting for these countries.

Table 3.13

Exports to Denmark of Mollusks* from 1999 to 2001, in kilos			
	1999	2000	2001
Total exports of mollusks to Denmark (in kilos)	1,183,033	813,181	1,485,089
Developing countries' exports of mollusks to Denmark (in kilos)	41,380	34,208	97,340
Share of total exports of mollusks to Denmark (in percent)	3	4	7

* CN categories: 03072990, 03073910, 03079913, 16059011, and 16059019

Source: Statistics of Denmark, 2002

Cephalopods

Cephalopods (octopus, cuttlefish, and squid) are a very important product group for developing countries. Cephalopods are all exported in frozen format and include the following CN categories.

Table 3.14

CN Number	Description
03074918	Frozen cuttlefish 'sepia officinalis' and 'rossia macrosoma', with or without shell
03074931	Frozen squid 'loligo vulgaris', with or without shell
03074938	Squid 'loligo', frozen (excl. loligo vulgaris, pealei and patagonica)
03075910	Frozen octopus 'octopus', with or without shell
03079911	'Illex', with or without shell, frozen

Source: Statistics of Denmark, 2002

The largest exporters of the cephalopods are Thailand, Spain, and South Korea. Among the developing countries exporting cephalopods, besides Thailand, are China, Vietnam, India, Philippines, Chad and Argentina. Thailand exported 922,367 kilos, followed by Vietnam with 60,538 kilos, and India with 33,250 kilos. As table 3.15 shows the market for cephalopods is growing, and even though the developing countries' percentage share of total exports has been declining in the three-year period, the amount of kilos exported has still risen significantly. The market for cephalopods is becoming an ever more interesting market for developing countries.

Table 3.15

Exports of Cephalopods from 1999 – 2001, in kilos			
	1999	2000	2001
Total exports of cephalopods to Denmark (in kilos)	1,451,384	1,475,908	1,806,748
Developing countries' exports cephalopods to Denmark (in kilos)	880,802	973,992	1,065,617
Share of total exports of cephalopods to Denmark (in percent)	61	66	59

Source: Statistics of Denmark, 2002

Other Types of Fish

The six categories of fish and crustaceans described above constitute a very high proportion of imports to Denmark from developing countries, but although not enjoying similar dimensions, other types of fish are also relevant for export. Sardines, hake, swordfish, flounder, trout, eels, redfish, pollak, monkfish, surimi and cod are all examples of types of fish that are imported from developing countries. For instance, Vietnam is strong in sardines, while white fish such as pollak and hake may come from Uruguay or Peru. Hake, monkfish, cardinal and orange roughly are imported from developing countries such as Namibia and South Africa. Other types of fish may equally constitute new opportunities, as the Danish market increases and the demand for exotic fish rises.

Tendencies in the Market

Some trends concerning the Danish market for fish and crustaceans can be derived from the analysis. These trends are:

- ▶ The market for fish is a mature market, which has been characterized by saturation. However, due to increased marketing efforts, a positive health image related to fish products, and easier accessibility to fish products in supermarkets, the market has recently started growing.
- ▶ In relation to the growing market, imports are also growing increasingly larger.
- ▶ Although the developing countries' share of imports is relatively low, it is increasing slowly.
- ▶ Demand is increasing for certain price competitive types of fish from developing countries that may serve as substitutes for local types of fish.
- ▶ The market for salmon, crab and lobster, and mollusks is growing rapidly.
- ▶ The market for tuna, cephalopods, and prawns is growing too, although more steadily.
- ▶ As the total market grows, demand for exotic fish, although being very small, also rises.

4. Distribution

Imports of fish and crustaceans from developing countries to the Danish market are primarily carried out by three groups of importers: Danish importers that distribute the fish products to all links further down the Danish distribution chain; wholesalers that import fish products and sell these to manufacturers or retailers; and finally manufacturers that import fish products for further processing in Denmark. Generally, Danish retailers and catering organizations do not import directly from developing countries. As a consequence, fish products often pass through different trade channels before reaching their final destination. Most fish products from developing countries are imported frozen or in cans, and is then processed or re-packed in Denmark before reaching the end-consumer.

Approximately 200 – 250 importers and exporters of fish products operate in Denmark. This number covers all types of importers and exporters –from a one-man company that operates on seasonality to the highly professional company employing hundreds of people year round.

In the following, the typical role of the different parties in the distribution chain is described in order to draw a general picture of the structure and purchasing pattern in the distribution chain.

Importers and Wholesalers

Danish importers and wholesalers are accountable for a large part of the import of fish products to the Danish market. Fish products are imported from foreign suppliers with whom they have often established a long-term relationship. The importers and wholesalers import fish and crustaceans on their own account and sell these to end-product manufacturers as well as to retailers and catering organizations. Importers and wholesalers purchase fish products on demand from customers further down the distribution chain, but mostly they purchase independently and therefore holding stock as well. Most fish products imported from developing countries are in frozen format.

Agents

Agents are intermediaries executing the buying or selling orders of a customer against a commission (approximately 2 – 5 percent of the purchasing price). Agents never actually take possession of a shipment

and neither do the products physically pass through the hands of the agents. Agents were used frequently some years ago by Danish importers, but today they are seldom used, as most importers, wholesalers and manufacturers prefer direct import to the Danish market due to a low mark-up on the price in the industry.

Manufacturers

Danish manufacturers handling fish products mostly import directly from suppliers abroad, but do also purchase through agents or from Danish importers and wholesalers. Most fish products are imported in frozen format. The target groups of manufacturers are retailers, catering organizations as well as other end-product manufacturers in the industry, for example smokehouses.

Retailers and Catering Organizations

Retailers carry out the final stage of selling fish products to the consumers, thereby accounting for a very large share of total sales on the Danish market. Retailers and catering organizations do not import directly from developing countries, but purchase these fish products from Danish importers, wholesalers or manufacturers. Few of the bigger supermarkets in Denmark only purchase fish and fish products directly from other EU countries and the USA.

Transportation

Fish products imported to the Danish market are transported by different means depending on the country of origin and the condition of the fishery products. If the fish products are imported fresh, the means of transportation will always be airfreight, whereas fishery products imported frozen will be transported either by truck (within the EU) or by ship (outside the EU) in deep freeze containers.

Normally, the exporter arranges the transport and is responsible for the freight of the fishery products until it has crossed the Danish border and has been handed over to the importer.

Tendencies in the Distribution Chain

The Danish market for fish products is characterized by many suppliers, processors and distributors. As it is the case in other EU countries, it is also expected that fewer players on the Danish market will be active in the future, thus leading to further centralization.

A tendency is that Danish importers have started to use Southeast Asia as a destination for the processing of fish products, though this only applies to fish caught far away from Danish shores. Due to lower production costs some Danish importers find it cheaper to have the fish processed in Southeast Asian countries and then export the fish products to Denmark.

The Internet is increasingly considered to have many opportunities as means of communication between business partners. E-commerce transactions of fish products in Europe are increasingly gaining ground and new sites are registered frequently. In Denmark, the use of e-commerce transaction of fish products is still rare, but as e-commerce sales is likely to imply bigger and quicker profits this type of transaction can be expected to have effect in the future.

Price and Mark-ups

The price structure of fish products naturally varies depending on the species, the type of retail outlet, and whether a retail company, a wholesaler or a manufacturer imports these. The mark-up price for fish products is generally low, approximately 5-10 percent for each link in the distribution chain.

Success Factors

The different importers of fish products on the Danish market often have a wide net of suppliers with whom they have had close co-operation for several years. This, however, does not mean that they are not open to new suppliers. Often the enquiries from potential suppliers are kept in the importer's database for a possible future business contact, though it is very important that these enquiries are aimed directly at the importer's specific area of business. Standard letters are generally not given much attention by Danish importers. Please refer to chapter 5 "Commercial Practice" on how to contact Danish importers.

A strong marketing and communication effort of the exporter is also recommended. In order to get the attention of the Danish importers it is important that the supplier is able to actively and professionally communicate what his competencies are; often a well-designed company brochure containing a product description and a price introduction is of importance. This type of communication effort will help the professional and qualified exporter to stand out from the crowd.

Danish importers unanimously stress that the fish products should be of high quality, that the foreign supplier should follow rules and regulations regarding hygiene control of the products to the letter, and that stable deliveries can be guaranteed. In general it can be stated that living up to delivery time and agreements regarding quality, price and quantity is of paramount importance if successful cooperation should be established with Danish importers. In other words: normal standards of good business behavior are strongly encouraged.

It must be emphasized that rules and regulation regarding importation of fish products to Denmark and the EU market is subject to strict control. Only suppliers approved and included on a specified EU list are allowed to export fish products to Denmark. Therefore, being able to continuously live up to these rules and regulations is of great importance if a close and enduring relationship should be established with Danish importers. Please also refer to chapter 6 on "Customs Duty and Import Regulations".

Another way of getting the attention of Danish importers is to visit or exhibit at trade fairs. Most Danish importers visit different trade fairs all over the world to meet with potential suppliers and to get an impression of the market potential. Especially, the annual trade fair in Brussels is a good place to meet with Danish importers as most Danish importers are present here. As close, personal relationships are often stressed within the industry, this is a very good way to meet potential business partners for both importers and suppliers and moreover, the foreign supplier has the best possible opportunity to show the Danish importer his products and competencies. Please refer to chapter 7 "Trade Fairs".

5. Commercial Practice

Due to an increasing use of the Internet, Danish importers of fish products receive many offers on a daily basis from foreign suppliers who wish to export to Denmark. Therefore, a foreign supplier of fish products must be aware that a Danish importer can pick and choose among many uninvited offers from qualified suppliers. The new supplier will often have to replace an already existing relationship with competent suppliers, and therefore the first impression and the first contact is of great importance to the subsequent success of entry into the Danish market. In order to even qualify as a supplier to the Danish market, it is important that the supplier obtains approval from the EU of his fishery or processing factory. For more information, please refer to chapter 6.

Contacting the Importer

First step is to send a business offer containing a precise product description, for example along with brochures, and the offer should be specifically aimed at the importer's line of business. Price should also be

introduced as close to the best price possible. It is of vital importance that contact details such as phone and fax number and e-mail address are stated correctly as inaccurate information will give a bad first impression and might cause the importer to immediately lose interest in the product. Many importers also stress that fast communication through e-mails are important as well as having an English-speaking staff.

It should never be assumed that the Danish importer will follow up on the business offer – the follow up is always expected to be made by the supplier. A follow up call will give an idea of the need and purchase pattern of the Danish importer, which can help evaluate the compatibility of the product. Moreover, when a supplier contacts a Danish importer for the first time, he cannot expect an order. It may take months before samples have been approved, a price has been settled, and the terms of the deal discussed and agreed upon.

Meeting with the Importer

Personal contact established through a business visit is also of importance. Danish importers travel widely, and if the product is of relevance to the importer's line of business, he will at some point want to visit the supplier for an inspection of the production facilities. Danish business people are generally result oriented and well versed within their particular field. Therefore, it is advisable to be well prepared and ready to respond to very direct questions about quality, prices, quantities and deliveries.

Delivery

Once a business deal has been settled, it is important that the actual delivery time and the condition of the products correspond to that agreed with the importer. It is therefore necessary that the supplier states the realistic delivery time right from the very beginning of a new partnership. The tolerance towards delay and products, which do not live up to agreements, is very limited and may lead to orders being cancelled.

Ethics and Codes of Conduct

Over the last decade, consumers in Denmark have increasingly paid more attention to the ethical conduct of business, which has given rise to the term "political consumers." This term implies that there is a strong tendency towards Danish consumers placing greater demand on Danish importers and manufacturers. They must be able to guarantee that the fish products imported from developing countries have not been subject to child labor or has caused industrial pollution or otherwise harmed the environment when caught or processed. For example, dynamite fishing could be an issue of concern, as could tuna fishing that harms dolphins. Therefore, by getting involved with Danish importers many suppliers from developing countries will be asked to sign a contract or statement guaranteeing that business is carried out without violating the above mentioned issues.

Furthermore, bribery is almost non-existent in Denmark. Recent studies have shown that Denmark is at the bottom of the list of countries in which bribery or corruption is found.

The Danish legal, regulatory and accounting systems for the business sector can be described as transparent and consistent with EU directives.

Visitor's Visa

For visitors from overseas countries a visa is usually required to visit Denmark. In order to obtain a visa a letter of invitation from the Danish business partner must always be included in the visa application. The exporter must apply for a visa at the Danish Embassy or Consulate in the home country. The visa issued will usually be for entry into the Schengen Area.

6. Customs Duty and Import Regulations

EU Directives

As strict control applies to importation of fish products for consumption in the EU, only certain countries and certain companies within those countries are permitted to export fish and crustaceans to the EU market. Imports of fish products are only allowed for countries, which are included on a specified EU lists (part of Directive 97/296 and 97/20). The list is divided into EEA countries, completely harmonized countries, provisionally harmonized countries as well as not-harmonized countries where different regulations on imports to the EU apply.

With regards to trade with fish products, the EU has set very strict rules regarding the quality standard of the products. Following the harmonization of rules and regulations in the EU (of January 1993) uniform quality regulations apply EU-wide.

Two directives, issued by the European Commission, bear special relevance to the trade with fish products. Directive 91/493/EEC and Directive 91/492/EEC regard the health conditions for the production and placing of fish products. These directives specifically deal with hygienic conditions in the process of handling, preparation, processing, packaging, storage, and transportation. On the basis of these directives, bans and restrictions have been imposed several times. The key feature of both directives is that all fish products, whether fresh, chilled, frozen, canned, salted, smoked or dried, imported from developing countries into the EU must come from a preparation, processing, packaging or storage facility, which has been approved by a relevant official body in the country concerned.

Other directives impose strict requirements to buildings, constructions, purification tanks and storage of the products in order to minimize the microbiological hazards that exist in the handling and processing of fish products. An exporter of fish products must therefore allow certain investigations to be carried out during the production phase and record data for a supervisory authority.

For more information on EU directives, see <http://europa.eu.int/eur-lex/>

EU Trade Agreements and GSP

As a member of the EU, Denmark follows the rules and regulations and applies the Common Customs tariff of the EU. An extended set of trade agreements between the EU and non-EU countries represent a complex set of exceptions to the general rules.

The EU grants a non-reciprocal trade preference to all developing countries. As a *general rule*, the General System of Preference (GSP) allows for duty free imports into the EU from the Least Developed Countries (LDC)* whereas other developing countries benefit from a reduction of the duty. Other countries have also entered into bilateral trade agreements with the EU with mutual preferential access for most goods.

However, as most fish products are classified as sensitive goods by the EU, duty exemption is not given for most fish products. Instead a deduction of the normal rates of duty is given.

**Classified by the OECD Development Assistance Committee, DAC. See www.oecd.org*

Documentation

Imports to Denmark have to follow the guidelines specified by the Danish Ministry of Food, Agriculture and Fisheries as well as regulations decided within the EU. Fish imported for consumption is subject to very strict rules regarding documentation, which must be obeyed.

Fish and crustaceans for consumption on the Danish market will always be subject to inspection by the Danish Veterinary Control upon arrival at the border. The veterinary control includes a physical control of the goods as well as control of needed documentation. Mandatory documents are a certificate of health issued by authorities in the exporter's home country and a certificate of hygiene. It is checked very strictly and therefore it is important to have filled in all relevant documents completely and accurately.

Moreover, specification of size/weight and freshness of the fish and crustaceans often has to be completed for duty clearance.

No import licenses are required by importers of fish products into the EU market.

In order to obtain preferential customs treatment when importing into the EU, it has to be documented that the product originates in a country, which enjoys the preferential agreement with the EU. In order to claim GSP, a GSP certificate of origin (Form A), signed and stamped by the authorities in the beneficiary country, must accompany the products. Furthermore, as a general rule the goods have to be sent directly from the country of origin to the EU.

Rates of Duty

The rates for import duties as of January 2002 are shown in the following table. These rates of duty cover the sub-categories within the CN-number 03.02 to 03.07 as well as 16.04 to 16.05, and apply to non-preferential trade.

Table 6.1

Rates of Duty, January 2002		
	CN-Number	Rate of Duty, %
Fish and crustaceans		
Fish, fresh or chilled	0302	2 – 23
Fish, frozen	0303	2 – 22
Filet or other fish meat, fresh, chilled or frozen	0304	2 – 18
Fish, dried or salted	0305	10 – 20
Shellfish	0306	6 – 18
Mollusks	0307	6 – 18
Fish, prepared or preserved	1604	5.5 – 25
Shellfish and mollusks, prepared or preserved	1605	8 – 20

As most fish products are classified as sensitive goods, duty exemption is not possible even when holding GSP status. Instead exporters able to claim GSP status can deduct 3.5 percentage point off the normal rates of duty. This however, does not apply to Thailand, Greenland and most countries of the former Soviet Union.

It must be stressed, though, that rules and regulations regarding duty are frequently changed. It is therefore advisable to always check the rate of duty in the individual case, based on the product and the country of origin. GSP duty rates should, for example, be checked with your local customs authorities.

Food Additives

In Denmark all food additives must be approved before use and they must have been through toxicological assessments before being accepted. The use of food additives is regulated via the “Positive List”, which is harmonized with EU regulation. Additives, which are not listed, are thus not allowed in Denmark.

Packaging Requirements and Labeling

Environmental issues play a role in packaging. According to environmental legislation and toxicity, certain requirements have to be fulfilled in relation to the use of packaging material. For example, with regards to canned fish products, requirements for the cadmium and mercury content are applicable. Moreover, if plastic bags are used and in direct contact with the fish products, the plastic should be made especially for food products, thereby ensuring that contact between the food and the plastic is not harmful.

As a general guideline, the label on the packaging should include the following information, though for some products additional information is needed. The required information must be given in Danish and therefore the importer will often supply the exporter with correct labels.

Table 6.2

General Guideline on Packaging Labeling	
Labeling Information	Example
Trade name	Shrimps
Origin	Thailand
Kind of preparation	Cooked
Conservation method	Single frozen
Count	Size 100/200 per lb
Ingredients	Shrimp, water, salt
Contents	1 kg
Product weight	900 gram
Expiring date	Best before 31.01.2003, when kept at –18 degrees Celsius
Warning	Do not freeze after thawing
Producer, exporter, importer	

The labeling of cans should contain the following information:

Table 6.3

General Guideline on Labeling of Cans
Net weight
Ingredients, incl. of additives, preservatives
Energy (k-joule)
Name and address of the packer
Best before date
Country of origin

With regards to tuna, it is sometimes recommended that a special label for tunas caught without harming dolphins is put on the cans.

Danish importers often have their own specific requirements regarding type and size of packaging as well as requirements for design and information on labels. Therefore, for an exporter of consumer-packed fish products, the best way to ensure that the product and packaging comply with Danish rules is to rely on the

importer's directions. It is only in the specific case of exporting that the exporter will be able to identify and follow the specific and correct regulations. Therefore, it is recommendable that the exporter cooperates closely with the Danish importer in order to fulfill requirements in general, as the rules and regulations are complex and subject to continuous change.

Price References

To avoid dumping of fish on the European market, a system of price reference has been agreed on. This means that a minimum price for a selected number of fish products has been agreed to and that this price has to be observed. In case the price reference is not observed, importation of the products concerned can be suspended, limited or subject to a duty of equalization. However, reference prices do not have a binding status and developing countries are sometimes allowed to import below the reference price.

Value Added Tax –VAT

The Danish VAT constitutes 25 percent and is among the highest rates within the EU. The 25 percent VAT is levied on all sales, regardless of product type, country of origin etc. Consequently, the high tax rate will in the end influence the retail prices and the consumers' desire and ability to purchase the product.

7. Trade Fairs

Participating in international trade fairs is an important activity in order to create contact to future business partners. Before exhibiting it is often advisable to participate in the fair as a visitor. A well-prepared and properly executed visit to a trade fair can constitute a very cost-effective market research. At the fair it is possible to meet both future competitors and potential customers.

If you choose to exhibit in a trade fair it is important to know in advance who the target groups of the fair are. Moreover, relevant Danish importers should be contacted prior to the trade fair in order to set up meetings during the fair, as some of these importers are likely to be exhibiting themselves. By looking at the list of exhibiting companies printed in trade fair catalogues from previous years it is possible to get a fair impression of which companies to contact in order to set up meetings (The catalogue can be obtained by contacting the trade fair organizers). Some of these might not have time for meetings during the fair if they are exhibiting themselves, and therefore it is important to allow yourself to stay a few days after the fair in order to conduct these meetings.

The only fish fair in Denmark is **Danfish International**. It is an international fish fair held every three years in the city of Ålborg in the Northern part of Denmark. The trade fair is mainly aimed at the processing and equipment part of the fishery industry and less at the actual industry for fishery consumer products. The next Danfish International trade fair is to take place in October 2003. More information is available on the internet: www.akkc.dk

Besides the fair held in Denmark, a number of important international trade fairs for fish products are held in the EU (Please see table 7.1). Danish companies frequently visit fairs outside Denmark, and therefore visiting these also represents a possibility for meeting Danish importers. Especially, the **European Seafood Exposition** in Brussels is an excellent place to meet Danish importers and wholesalers of fish products as this fair is highly prioritized by Danish importers.

In order to ensure the best possible match between your products and the target group of the fair it is highly recommendable to investigate a fair closely before contemplating a visit. Information on the different fairs is available on the internet: www.phone-fax.com/index2.htm

Table 7.1

International Trade Fairs		
Name	Where	When
European Seafood Exposition (ESE)	Brussels, Belgium	April 2003, annually
Fish International & Seafood Europe	Bremen, Germany	February 2004, biennial
Anuga	Cologne, Germany	October 2003, biennial
IFE	London, United Kingdom	March 2003, biennial
Sial	Paris, France	October 2002, biennial
World Fishing exposition Vigo	Vigo, Spain	2003, every six years

8. Important Addresses

DIPO –Danish Import Promotion Office

Boersen
DK –1217 Copenhagen K
Phone: +45 70 12 13 00
Fax: +45 33 12 05 25
E-mail: dipo@commerce.dk
www.dipo.dk

Danish Ministry of Foreign Affairs

Asiatisk Plads 2
DK- 1448 Copenhagen K
Phone: +45 33 92 00 00
Fax: +45 33 12 37 78
E-mail: um@um.dk
www.um.dk

Statistics of Denmark

Sejrøgade 11
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E-mail: dst@dst.dk

Danfish International

Aalborg Congress & Culture Center
Europa Plads 4
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