

Market Development

MARKET BRIEF ON

AQUARIUM FISH

OVERVIEW OF THE EUROPEAN UNION

ITALY

JAPAN

UNITED STATES OF AMERICA

1995

ITC



INTERNATIONAL TRADE CENTRE UNCTAD/GATT

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GENEVA

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Aquarium fish - European Union

PRODUCT DESCRIPTION

This market brief covers ornamental fish, with special emphasis on tropical fish. In the European Union (EU) statistics, they are classified under the following CN (Combined Nomenclature) codes:

CN 0301.10 Ornamental fish
 CN 0301.10-10 Live ornamental freshwater fish
 CN 0301.10-90 Live ornamental saltwater fish

TRADE

European Union: imports of ornamental fish, 1990-1994 (V: ECU '000; Q: metric tons)										
	1990		1991		1992		1993		1994	
	Q	V	Q	V	Q	V	Q	V	Q	V
Total	2,503	58,564	2,940	69,017	3,050	72,173	3,624	74,479	3,927	83,589
Extra	2,190	49,651	2,465	59,284	2,505	62,561	2,597	67,580	2,801	74,510
Intra	308	8,866	481	9,727	540	9,615	1,027	7,899	1,126	9,079

Source: EUROSTAT COMEXT.
 Note: Totals may not tally due to rounding of data. Figures comprise freshwater and saltwater fish.

The statistical data for the EU as a whole differ substantially from the aggregates of the totals officially reported by each country. In 1994 freshwater fish accounted for more than 90% of total EU imports by value, the remainder being saltwater fish. Annex I shows that during the period 1991-1994, Germany was the largest EU national import market, followed by the United Kingdom and France; in 1994 these countries accounted for 64% of EU imports of aquarium fish in terms of value. Italy, the Benelux countries and Spain accounted together for 32%.

During the period under review EU exports of both categories increased moderately and in 1994 totalled ECU 17.7 million of which ECU 10.1 million consisted of exports to non-EU countries.

MAIN ORIGINS OF IMPORTS

In 1994 some 80 countries supplied ornamental fish to the EU, the great majority were developing countries. Asian countries are important players in the aquarium fish industry.

Annex II shows that in 1994 Singapore, the world's single largest exporter of aquarium fish, accounted for 42.5% of total EU freshwater imports by value. The second and third largest supplier countries were Israel and the Czech Republic (respectively 9.3% and 8.4%). Japan, Malaysia, Indonesia, China, Hong Kong, Sri Lanka and Thailand accounted altogether for approximately 20%. The next largest supplying region is the American continent, with 14% of the total EU imports, originating principally in the United States (5.5%), Brazil (5.2%) and Colombia (2.3%). In recent years African countries - particularly Nigeria, Zaire, Guinea, the United Republic of Tanzania, Burundi and Malawi - have gained a significant market share.

In 1994, Indonesia, Singapore, the Philippines and Sri Lanka accounted for 72% of total EU imports of saltwater fish, the balance came principally from the United States, Kenya, Maldives and Egypt. See annex III.

MARKET CHARACTERISTICS

According to trade sources, among the most popular species in demand are:

- *Paracheidon innesi* (Neon)
- *Poecilia reticulata* in numerous varieties (Lebistes and Guppy)
- *Xiphophorus maculatus* in different varieties (Platy)
- *Xiphophorus hellis* in different varieties (Xipho)
- *Betta splendens*
- *Pterophyllum scalare* in different varieties (Angels and Scalare)
- *Corydoras* of many species
- *Paracheiroidon axelrodi*

Others:

- *Rasbora* of different species
- *Gymnocorymbus*
- *Trichogaster*
- *Capoeta* (Barbus)
- *Brachydanio*
- *Colisia*
- *Botia*
- *Mollienisia* (Molly)

The colour and the shape of the fish usually play an important role in consumer preference. Tropical fish are preferred because of their varied colours. Owing to the rising cost of production and transport as well as the interest in high-quality fish, breeders are gaining greater shares of the market. It is necessary to maintain flexibility to be able to adapt production to changes in market demand. The following are the most important pond-raised fish families:

- *Characidae*
- *Cyprinade* (Barbs and Goldfish)
- *Callichthyidae* (mostly *Corydoras*)
- *Loricaridae* (*Plecostomus* and *Ancistrus*)
- *Poecilidae* (Guppies, Platies, Swordtails and Mollies)
- *Cichlidae* (Cichlids, Mouthbreeder and Egglayers)
- *Anabantidae* (Labyrinthfish, Betta and Gourami)

MARKET ACCESS

No duty is levied on imports of freshwater ornamental fish. The duty is 13.5% for saltwater fish and 11% for other invertebrates. The following table gives some examples:

Origin	Rate of duty		
	Freshwater fish	Saltwater fish	Invertebrates
Indonesia	Nil	13.5% *	11%
Singapore	Nil	13.5% *	11%
Sri Lanka	Nil	13.5% *	11%
Kenya	Nil	13.5% *	11%
United States	Nil	13.5% *	11%

* N.B. Under the Uruguay Round this rate will be reduced to 7.5% in equal annual installments until July 2000.

However, if the shipment is accompanied by a Generalized System of Preferences (GSP) certificate, the importer can obtain an exemption from the saltwater fish duty and, in the case of invertebrates, a duty reduction from 11% to 4%.

Other relevant information on regulations affecting imports of certain species are found in the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES) (see appendix I: Overview of CITES trade regulations). In some EU countries imports of ornamental fish are subject to veterinary controls.

DISTRIBUTION CHANNELS

Three main channels of distribution can be defined broadly, even though their activities overlap to some extent. Wholesalers are the first category: they are usually well-established importing companies run by qualified staff whose priority is welfare of the fish. These are unpacked in ideal conditions, preferably under red light to reduce stress and to allow a faster recovery from the journey. Some of these companies import large numbers of fish and have up to 1,000 tanks; others within the same channel have fewer tanks (50) but specialize either in fish from a particular region or in a group of species. This category represents the most important source of supply for many pet shops. Wholesalers, acting on behalf of consolidators or transshippers, are the second category: they simply function as intermediaries. The third category consists of groups of retailers who jointly import a certain number of boxes and then divide the fish according to their initial orders. Appendix III gives a list of importers.

TRANSPORTATION/ PACKAGING

Aquarium fish freight and packing charges can add up to 50% to the total cost of the fish. Fish are usually packed in polythene bags which are filled 1/4 with water and the rest with oxygen or compressed air, then sealed and packed in a polystyrene box which normally measures 50 cm x 40 cm x 40 cm. The number of fish that a box can contain depends on the size of the fish; a rough average is 330 fish per box. The following table shows the different weights of such boxes:

Country/area	Weight
Nigeria	6 kg
Brazil, Ecuador	8 kg-10 kg
Colombia	9 kg
Israel, Germany, Singapore, South Africa, Sri Lanka	10 kg
Hong Kong	11 kg
United States	14 kg

Air-breathing fish (i.e. Anabantids and Callichthyids) are particularly sensitive to high concentrations of oxygen; lack of awareness or carelessness can dramatically increase the mortality rate among these species. For this reason, transportation is mainly by air. Almost all world airlines will only accept live animals packed according to the International Air Transport Association (IATA) Live Animals Regulations, an agreement which is recognized almost worldwide.

TRADE PROMOTION

Various trade events/fairs organized all around the world offer the latest news within the aquarium fish industry. Importers and exporters provide detailed and informative materials about their companies, production, prices, etc. which can help them enter new markets. A wide range of specialized magazines are also available and help promote trade. (See appendix II: Useful addresses worldwide.)

MARKET PROSPECTS

According to trade sources EU production of ornamental fish will remain rather low and the market will continue to depend on imports, particularly of tropical fish.

With imports amounting to ECU 75.5 million in 1994, the EU is the world's largest importer of ornamental fish. Importers and wholesalers expect that imports will remain at the present level or increase moderately during the coming years. They are actively looking for new and reliable trade partners in tropical and subtropical countries in order to diversify their sources of supply and the fish species.

Better handling and shipping will help reduce the mortality rate of fish, which is one of the main causes of loss for importers. This will consequently contribute to decrease trade margins and retail prices with subsequent fostering of demand.

Annex I

European Union: imports of ornamental fish from non-EU countries, 1991-1994 (Q: metric tons; V: ECU '000)								
	1991		1992		1993		1994	
	Q	V	Q	V	Q	V	Q	V
EU (12 countries)	2,465	59,284	2,505	62,561	2,621	67,593	2,802	74,532
Germany	228	13,383	254	14,958	335	16,782	382	19,262
United Kingdom	1,239	16,840	1,081	15,621	1,103	16,061	1,174	17,117
France	441	10,048	468	10,486	467	10,768	484	11,729
Netherlands	221	5,294	266	5,517	266	6,239	281	6,674
Italy	32	5,017	13	5,817	8	5,968	16	6,614
Spain	160	3,620	203	4,664	169	5,247	172	5,799
Belgium-Luxembourg	74	3,134	115	3,665	171	4,456	193	5,065
Denmark	27	1,109	27	1,029	28	1,058	37	1,165
Portugal	31	449	70	574	63	717	50	777
Greece	9	371	8	222	8	270	10	319
Ireland	3	19	0	8	3	9	3	11

Source: EUROSTAT-COMEXT.

Annex II

European Union: principal non-EU suppliers of freshwater ornamental fish, 1994 (Q: metric tons; V: ECU '000)		
	Q	V
Total imports from non-EU countries/ territories of which:	2,472	67,040
Singapore	939	28.501
Israel	353	6,260
Czech Republic	109	5,696
United States	203	3,686
Brazil	114	3,510
Japan	61	3,157
Thailand	96	2,673
Malaysia	58	1,745
China	71	1,649
Hong Kong	60	1,633
Colombia	87	1,538
Indonesia	58	1,508
Sri Lanka	45	895
Nigeria	39	669
Zaire	32	545
Peru	22	446
Guinea	6	250
Burundi	13	224
Tanzania, United Rep. of	14	214
Viet Nam	16	163
Zambia	7	160
South Africa	7	143

Source: EUROSTAT-COMEXT.

Annex III

European Union: principal suppliers of saltwater ornamental fish, 1994 (Q: metric tons; V: ECU '000)		
	Q	V
Total imports from non-EU countries/ territories of which:	330	7,492
Indonesia	90	1816
Singapore	42	1,265
Philippines	36	1,186
Sri Lanka	48	1,138
United States	36	792
Kenya	22	315
Maldives	18	201
Egypt	3	163
Suriname	2	77
Brazil	1	66
Martinique	4	63

Source: EUROSTAT-COMEXT.

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- Dr Herbert R. Axelroad. **Breeding Aquarium Fish**, 1979. T.F.H. Publications Inc.

Aquarium fish - Italy

PRODUCT DESCRIPTION

This market brief covers ornamental fish, which in the Italian foreign trade statistics are classified under the following codes:

HS 0301.10-100 Live ornamental freshwater fish

HS 0301.10-900 Live ornamental saltwater fish

TRADE

Italy: imports and exports of ornamental freshwater fish, 1990-1994 (Q: quintals; V: Lit million)										
	1990		1991		1992		1993		1994	
	Q	V	Q	V	Q	V	Q	V	Q	V
Imports	496	5,158.6	535	6,473.2	394	7,986.3	411	9,267.8	561	11,625.9
Exports	286	553.2	335	755.9	348	742.5	231	881.6	357	938.5
Source: ISTAT.										
Quintal = 100 kg.										

Italy: imports and exports of ornamental saltwater fish, 1990-1994 (Q: quintals; V: Lit million)										
	1990		1991		1992		1993		1994	
	Q	V	Q	V	Q	V	Q	V	Q	V
Imports	184	1,832.6	203	2,483.4	147	2,570.1	550	3,655.3	532	4,261.6
Exports	193	129.1	243	238.3	262	75.1	576	308.2	305	938.5
Source: ISTAT.										

MAIN ORIGINS OF IMPORTS

In 1994 the principal suppliers of Italy in terms of value (in Lit million) were:

- HS 0301.10-100 Live ornamental freshwater fish: Singapore (6,305.2), the Netherlands (1,636.1), the Czech Republic (606.2), the United States (483.2).

- HS 0301.10-900 Live ornamental saltwater fish: the Netherlands, Greece, the United States, Sri Lanka, Indonesia, Singapore and the Philippines.

Singapore accounted for nearly 60% of total freshwater aquarium fish imports. Another major source of supply is the Czech Republic, with its tank-raised fish, which are transported mainly by truck. This portion of trade accounts for approximately 10% of Italian freshwater aquarium fish imports.

MARKET CHARACTERISTICS

The most demanded species within the Italian market are generally those listed on page 2.

In the recent years the entry into the Italian market of new importers has increased the competition up to a point where the market experienced a drop in prices. Some of these importers were unable to accurately estimate the high costs of maintenance and as a result could not survive in the market. For this reason margins in the tropical aquarium fish industry are very high.

DISTRIBUTION CHANNELS

One of the main characteristics of the Italian market is its fragmentation: hundreds of small- and medium-sized importers are present in the market. In recent years a number of outlets have opened; many of these have had to close down because of staff lack of experience and consequent mismanagement of tanks and fish.

The distribution channels can be divided into three major groups. The first consists of wholesalers with tanks for quarantine of tropical and cold-water fish. The second is a group of wholesalers without tanks (transshippers), who sometimes ignore the Italian sanitary regulations in their import procedures. The third group is made up of retailers who, either individually or jointly, import directly from suppliers, particularly from Singapore or other countries in the Far East. Tropical aquarium fish are mainly sold through specialized stores; the number of such outlets is 1,800 to 2,000 nationwide.

COMMERCIAL PRACTICES

The importer sends the order to the supplier together with details concerning the airline, the flight number and approximate dates of delivery. The terms of payment vary from supplier to supplier; the common practice for payment ranges from 8 to 30 days after receipt of the shipment.

Insurance in this sector is a delicate issue. Since tropical aquarium fish have a high mortality rate, the cost of insurance would be too high to bear for importers, and almost no insurance company will insure these products. Occasionally the supplier will replace, in the following shipment, the fish lost; still, the importer has to bear the losses incurred in respect of the costs of transportation, packaging, customs and other miscellaneous expenses.

MARKET PROSPECTS

During the period 1990-1994 Italian imports of aquarium fish increased steadily, by value reaching double the 1990 level in 1994. The fact that an increasing number of Italian traders are entering this sector indicates an optimistic view regarding its future growth. Some of them seem to disturb the trade owing to lack of experience, but those who survive in this competitive market and specialize will contribute to strengthen the Italian distribution

channels in expansion throughout Italy. Although small compared to the world's major importing markets, this fast-growing market offers good prospects to exporters in developing countries and will probably play an important role as a point of entry for transit to other EU countries.

USEFUL ADDRESSES

Ministero delle Risorse Agricole
Alimentari Corpo Forestale dello Stato
Servizio Certificazione CITES
Via G. Carducci, 5
00187 Roma
Tel: (396) 46657038/46657040/46657052
Fax: (396) 6748075

ICE
Istituto Nazionale del Commercio Estero
(Italian Institute for Foreign Trade)
Cooperation Department
Via Liszt, 21
00144 Roma
Tel: (396) 59921/5992473
Fax: (396) 59647438

Ministero della Sanità
Direzione Generale Servizi Veterinari
Viale dell'Industria, 20
00144 Roma
Tel: (396) 59943946/59943296

ASCOM
Piazza dei Martiri, 16
Palazzo Porta Dante
32100 Belluno
Tel: (39437) 215111
Fax: (39437) 25736

Aquarium fish - Japan

PRODUCT DESCRIPTION

In the Japanese foreign trade statistics ornamental fish are classified under the following codes:

HS 0301.10-010 Carp and gold-fish, ornamental fish, live

HS 0301.10-020 Ornamental fish, excluding carp and gold-fish, live

This market brief covers the second group, with special emphasis on tropical fish.

TRADE

Japan: imports and exports of ornamental fish, 1991-1994								
(Q: kg; V: ¥ '000)								
	1991		1992		1993		1994	
	Q	V	Q	V	Q	V	Q	V
Imports	231,392	4,227,368	300,947	5,416,156	391,533	6,018,884	476,141	6,850,776
Exports	73,634	784,800	75,332	784,222	78,214	707,229	90,251	740,009

Source: Japan Export & Import, Japan Tariff Association.

Imports (calculated from customs clearances) of live ornamental fish increased steadily and in 1994 were around US\$ 67 million in value terms (about US\$ 23 million in 1990). In terms of quantity, imports increased considerably from 300 tons in 1990 to 476.1 tons in 1994. During the period under review exports by value were fairly stable.

MAIN ORIGINS OF IMPORTS

In 1994, out of some 50 countries exporting ornamental fish to Japan, the principal suppliers in value terms were (figures in ¥ '000):

Singapore	1,353,991	Malaysia	327,183
Hong Kong	1,051,162	Philippines	268,892
United States	970,572	Netherlands	262,573
Indonesia	633,965	Peru	164,097
Germany	470,172	Taiwan Province (China)	132,245
Brazil	423,891	Colombia	111,046
Thailand	371,485	United Kingdom	109,050

Singapore, Hong Kong, Thailand, Indonesia are traditional suppliers to Japan. In recent years imports from America, particularly from the United States and Brazil have gained a considerable market share. Singapore is the largest supplier of Guppies. The United States mainly supplies wild-caught South American fish, which are imported and re-exported by several companies through Miami and Los Angeles. Most wild-caught marine fish are shipped by the Philippines and Indonesia. Brazil supplies local wild-caught Amazon.

MARKET CHARACTERISTICS

According to reliable trade sources, the estimated market size for ornamental fish and related aquarium products has reached approximately US\$ 1,560 million in 1994 in retail price terms. The number of estimated aquarium hobbyists in Japan is around 1.2 million out of a total population of 120 million. According to market research in 1992, the household popularity ratio for ornamental fish was 2.9%, compared to 4.0% of the United States, which is the largest market in the world.

The most demanded species is the Guppy: it represents 28% of the total Japanese market. Guppies are popular since they are not expensive and are beautiful and easy to look after for beginner hobbyists. However, specimens often incur diseases because of a poor genetic base, with the result is that the fish die early discouraging beginners from continuing. The same can be of other species, such as *Angel* and *Discus*. The latter boomed in the world market several years ago while the economy was rosy, but during the most recent years of recession consumers have become more selective and demanding.

The following are the most popular species in Japan:

- Guppies (*poecilia reticulatus*)
- Neon Tetra (*Paracheirodon Innesi*)
- Red Nose Tetra (*Petitella georgiae*) or (*Hemigrammus rhodostomus*)
- Cardinal Tetra (*Paracheirodon Axelrodi*)
- Black Tetra (*Gymnocorymbus Ternetzi*)
- Tiger Barb (*Puntius Tetrazona*)
- *Rasbora Heteromorpha*
- Discus (*Symphisodon Aequifasciatus*)
- Angel Fish (*Pterophyllum Scalare*)
- *Betta Splendens*
- Gourami (*Colisa Lalia*)
- Platy (*Xiphophorus Maculatus*)
- Swordtail (*Xiphophorus Helleri*)
- *Corydoras Julii*
- Alge Eater (*Gyrinocheilus Aymonieri*)
- White Clouds (*Tanichthys Albonubes*)
- Zebra Danio (*Brachydanio Rerio*)

MARKET ACCESS

Import declarations must be filed with the Customs office having jurisdiction over the bonded area storing the cargo. The documents to be submitted should include:

- Import Declaration Form (3 copies)
- Import-related papers (invoice, packing list, freight and insurance documents, this last if available)
- Import Licence
- Export permit issued in the exporting country

If the import is permitted following the review of documentation or, as may be deemed necessary, physical inspection by Customs, an import permit is issued. According to World Tariff the duty levied on aquarium fish imports is 2.3% (the Uruguay Round end tariff is 1.7%). Exemption from the duty can be obtained if the shipment is accompanied by a Certificate of Origin under the Generalized System of Preferences (Form A).

The following are the principal legislation instruments applicable:

- Preservation of Endangered Species of Wild Fauna and Flora (CITES). (See appendix I: Overview of CITES trade regulations.)
- Protection of Cultural Heritage Law.

The first law directly controls the trade of ornamental fish. It took effect as of 1 April 1993 after combining the Control of Trade of Endangered Species of Wild Fauna and Flora Law, CITES, with the Special Birds Law. Previously, the domestic laws to complement CITES put more emphasis on the control of purchasing/selling in Japan; nowadays provides for a wider and more systematic control, which also covers imports and exports, and the protection of the habitats of these animals and aquatic plants. Since 1 April 1995 native Japanese fish called *Itasenbara* and *Miyako Tanago* (king of barb) have been included as protected species. Corals and shellfish *Tridacnidae spp* are also included.

The second law, which entered into force in 1950, is aimed mainly at preserving cultural buildings such as ancient temples and historical places. Since nature is a part of the culture, the "Natural Monuments" system was created. The taking of living things which are designated as natural monuments is absolutely prohibited in the restricted areas, and acts which might affect their living patterns are forbidden. At present, several kinds of fish and some goldfish are designated as natural monuments.

DISTRIBUTION CHANNELS

The distribution system in Japan comprises various channels. The importer purchases tropical fish from suppliers around the world, then sells them to Japanese domestic wholesalers. There are 16 large-scale importers, located mainly in metropolitan areas such as Tokyo, Osaka and Kobe. Approximately 200 wholesalers all over the country buy from importers and sell to local retailers. The usual method of wholesale trading in Japan is to take orders after communicating the prices to the retailers. Wholesalers also organize auctions to which they invite retailers once a week from spring to autumn and twice a month in winter. Most wholesalers handle not only aquarium fish but also aquatic plants and related aquarium products.

There are about 3,000 retailers in Japan; most of them are specialized shops selling tropical fish and other kinds of pets. Two types of shops operate: the first are independent outlets, the second are branches of large-scale retailers. There are also brokers between goldfish breeders and wholesalers. This category deals in a different way from the industry of tropical fish: goldfish breeders are numerous and small in scale; the broker helps to arrange deals for them. In the sale of goldfish, auctions are common. The distribution system for *koi* can be broadly compared to that for goldfish.

Today the role of each channel within the Japanese distribution system is not as strictly refined as before and in the future it will become more and more flexible.

TRANSPORTATION/PACKAGING

The situation and problems described under the same heading in the chapter on the EU market also apply to Japan. Other causes of heavy losses (up to 30%) are dense packing during air transport and delays in handling in airports.

MARKET PROSPECTS

With imports amounting to US\$ 67 million in 1994, Japan is the world's second largest market for ornamental fish after the EU. Imports are expected to continue to increase. Mostly due to the prohibition on keeping animals such as cats and dogs in most apartments/condominiums, people are becoming more and more interested in starting aquaria. Another reason for the expected future market growth is the aesthetic effects of aquaria: consumers have the opportunity for an art expression and creativity through the different colours, shape and size of fish.

Since fish mortality represents an obstacle to increasing the number of hobbyists in the Japanese market, suppliers able to offer superior quality, healthy and disease-resistant fish would stand an opportunity to enter the market.

USEFUL ADDRESSES

Japan External Trade Organization
2-5, Toranomon 2-Chome
Minato-ku
Tokyo 105
Tel: (813) 35825522
Fax: (813) 35870219
Tlx: 24378 JETRO J

Fishery Agency
Ministry of Agriculture
Forestry and Fishery
1-2-1, Kasumikaseki
Chiyoda-ku
Tokyo 100
Tel: (813) 35028111

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Aquarium fish - United States

PRODUCT DESCRIPTION

In the United States foreign trade statistics ornamental fish are classified under the following code:

HTSUSA 0301.100000 Fish, ornamental, live

TRADE

United States: imports and exports of ornamental fish, 1991-1994 (value in US\$ '000)				
	1991	1992	1993	1994
Imports	36,145	41,117	45,250	46,769
Exports	12,819	15,146	17,368	n.a.

Source: US Department of Commerce.

Imports in 1994 are 29.3% above the 1991 level. The bulk of exports went to Asia, principally to Japan.

MAIN ORIGINS OF IMPORTS

In 1994 the principal suppliers of the United States in value terms were (figures in US\$ '000):

Thailand	9,460	Brazil	1,628
Singapore	8,567	Japan	1,200
Indonesia	6,055	Malaysia	1,118
Hong Kong	4,575	Kiribati	503
Philippines	4,146	China	482
Colombia	2,415	Nigeria	416
Peru	2,140	Guyana	367

The minor suppliers included Zaire, Burundi and the United Republic of Tanzania. Some 80% of imports originated in Asia, the balance came principally from South America.

MARKET CHARACTERISTICS

In 1992, a survey of the United States ornamental fish industry showed that 10 million homes owned an aquarium and that there were over 200 million ornamental fish in the

country. Data also show that 10% of United States households (9.2 million homes) maintain freshwater aquaria and 40% of these maintain more than one. While demand is mainly for freshwater fish, there is a growing interest amongst hobbyists in marine species, which are found in 0.8% of all households (730,000) in the United States. The numbers of aquaria in offices, hospitals, or public areas are unknown.

The following table gives an overview of aquarium ownership in the United States:

	Aquarium ownership		
	One aquarium	Two aquaria	Three aquaria
Freshwater 9.2 ML homes	56%	23%	21%
Marine 730,000 homes	84%	11%	5%

Florida is the most important captive-bred freshwater fish producer in the country (95% of national production) with 187 active growers of tropical fish, with an aggregate turnover of US\$ 46.7 million in 1991 (64% of total aquacultural products in value terms). The majority of this production is sold within the domestic market, although a portion finds its way to western Europe and elsewhere. Growers also sold US\$ 7.3 million worth of tropical fish which they imported for resale. In 1993 there were 10,300 acres of land (including watersurface area), in Florida devoted to aquaculture production, as compared to 8,100 acres reported in 1991.

MARKET ACCESS

No duty is levied on imports of freshwater ornamental fish. In the schedule for reduction in tariffs for fish and fish products under the Uruguay Round, saltwater fish carry a 15.0% base tariff with a 7.5% end tariff.

All wildlife shipments must enter and leave the country through Customs ports designated by the Fish and Wildlife Service USFWS. Currently there are 11 designated ports: New York , NY; Miami, FL; Baltimore, MD; New Orleans, LA; Dallas, FT. Worth, TX; Los Angeles and San Francisco, CA; Chicago, IL; Seattle, WA; Honolulu, HI and Portland, OR. For all imports and reexports, prior notice to the Fish and Wildlife Service inspector and the U.S. Customs service inspector should be given (72 hours prior notice is recommended). The USFWS requests the following documents at port:

- Form 3-177 (Wildlife Declaration Form) an original plus 3 copies;
- Copy of airway bill or bill of lading;
- Copy of invoice (Pro-forma invoice if shipment is non-commercial).
- CITES permits or certificates necessary for appendices I, II, III wildlife with the following provisions:

	Appendix I	Appendix II	Appendix III
Imports into the United States	Provide original United States import permit. Provide original foreign export permit or reexport certificate.	Provide original foreign export permit or reexport certificate.	Provide original foreign export permit (if from listing country) or certificate of origin; or reexport certificate.

Details of the regulations concerning certain species are to be found in the Convention on International Trade in Endangered Species (CITES) (see appendix I: Overview of CITES trade regulations).

Some species protected under CITES are also protected by other United States laws, under which permit requirements may be more stringent. Permit applicants must satisfy the requirements of all laws under which a particular species is protected. The USFWS (Office of Management Authority (OMA), of the U.S. Department of the Interior) may be contacted for more information on these laws (see useful addresses).

DISTRIBUTION CHANNELS

Live specimens are sold by 9,000 to 12,000 pet stores, aquarium stores, garden supply stores, discount stores, variety stores, pet food warehouses, etc.

Industry and hobbyists provide steady markets for more than 3,000 species. Freshwater fish are obtained: 76% from a pet or fish store and 14% from a discount store, while 10% are bred at home, 90% of marine fish are obtained from a pet or fish store.

COMMERCIAL PRACTICES

Transshippers normally collect orders from wholesalers and import in large, consolidated shipments. Business transactions are sometimes done on an open account basis. Terms vary, although they must be competitive against local suppliers. Payment is normally made 2-3 weeks after the arrival of consignments, although its mode normally depends on the degree of trust between the importer and exporter. The cost of freight is always paid by the importer, usually in advance. Shipments are normally not covered by insurance owing to the high risk of loss and the difficulty of identifying the precise contents of each consignment.

TRANSPORTATION/PACKAGING

Los Angeles is by far the main point of entry of aquarium fish, followed by New York City and Chicago. The transport and packaging problems described in the EU section also apply in the United States.

MARKET PROSPECTS

With imports totalling US\$ 46.9 million in 1994, the United States are the world's third largest import market of aquarium fish. The annual growth of the industry (10% to 12% in recent years) is expected to continue. Despite the increasing domestic production, imports will probably continue to increase, and its market will remain a major outlet for suppliers from developing countries.

USEFUL ADDRESSES

Associations

Farms Association, Inc.
P.O. Box 1519
Winter Haven, FL 33882
Tel: (1813) 2935710
Fax: (1813) 2995154

Florida Agricultural
Statistics Service
1222 Woodward Street
Orlando, FL 32803
Tel: (1407) 6486013

Pet Industry Distributors Ass'n
5024-R Campbell Blvd.
Baltimore, MD 21236
Tel: (1410) 9318100
Fax: (1410) 9318111

Pet Industry Joint
Advisory Council
1220 19th. St., N.W., Suite 400
Washington, D.C. 20036
Tel: (1202) 4521525
Fax: (1202) 2934377

BIBLIOGRAPHY

- NFO Research, Inc. **National Pet Owners Study**, May 1992.
- US Department of Commerce. **US Imports for Consumption - Harmonized TSUSA Commodity by Country of Origin.**
- US Department of Commerce. **US Exports Harmonized Schedule B Commodity by Country.**
- International Trade Centre UNCTAD/GATT - **Tropical Aquarium Fish - USA**, Market brief, 1991.
- Fancy Publications Inc., **Pets Products News & PSM**, Box 6050 Mission Vije, CA 92690, United States of America.
- H.H. Backer Associates Inc., **Pet Age**, 20 E. Jackson Blvd. Ste 200, Chicago-IL 6060, United States of America.

Appendix I

Overview of CITES trade regulations

The Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES) is an international legal instrument that was signed in Washington, D.C., on 3 March 1973. It entered into force on 1 July 1975 and now (June 1995) has a membership of 128 States.

The aim of the Convention is to ensure the cooperation of contracting States (Parties) to prevent international trade in specimens of wild animals and plants from threatening their survival.

HOW CITES WORKS

CITES works by subjecting trade in readily recognizable specimens of selected species to certain controls. The species covered by CITES are listed in three appendices, according to the degree of protection they need. These appendices are revised at the biennial meetings of the Conference of the Parties.

Appendix I includes species threatened with extinction. Trade in specimens of these species is permitted only in exceptional circumstances.

Appendix II includes species not necessarily threatened with extinction, but in which trade must be controlled in order to avoid utilization incompatible with their survival.

Appendix III contains species that are protected in at least one country, which has asked other CITES Parties for assistance in controlling the trade.

Each Party to the Convention must designate one or more Management Authorities in charge of administering the licensing system and one or more scientific authorities to advise them on the effects of trade on the status of the species. A specimen of a CITES-listed species may be imported into or exported (or re-exported) from a State party to the Convention only if the appropriate document has been obtained and presented for clearance at the port of entry or exit.

A list of Management Authorities of Parties to CITES can be obtained by writing to:

CITES Secretariat
UNEP
Case Postale 456
1219 Châtelaine/Genève
Tel: (41 22) 9799139/40
Fax: (41 22) 7973417

CITES AND TRADE IN TROPICAL AQUARIUM FISH

Few species of fish are listed in the CITES appendices. The following table lists those which are:

Hartono Farm
Mr Hartono
Tanjung Pura 285
Pontianak
West Kalimantan

PT Dinamika Kapuas
Mr Soehartono Aliman
Gajah Mada Street No. 150,152,154,156
Pontianak
West Kalimantan

PT Munjul Pri
ma Utama
Mr Tris Tanoto
Jl. Raya Munjul 99
Cibubur
Jakarta Timur

PT Seloka Swara Yudha
Mr Agustinus Tantohari
Jl. Raya Sentul, Km 2.5 (farm)
Bogor
Jl. Sukabumi 19 (office)
Djakarta

PT Sumber Jaya Baru Sakti
Mr Sutopo Tjendera
Sultan Muhammad 226
Pontianak
West Kalimantan

The Henrie
Mr The Henrie
Tanjung Pura 381-383
West Kalimantan

MALAYSIA

Mr Ng Huan Tong and
Ng Hang Yong
10, Jalan Jenang
11, Jalan Merawan
83000 Batu Pahat
Johor

Mr Goh Siak Ngan
Rainbow Aquaculture (M) Sdn.Bhd.
No 34, Jalan Biru Muda
Taman Bukit Pasir
8300 Batu Pahat
Johor

SINGAPORE

Mr Ho Kian Huat
M/S Rainbow Aquarium Pte Ltd
Lot 35-38
Sungei Tengah Agrotechnology Park

Appendix II

Useful addresses worldwide (non-exhaustive)

A. Trade fairs

PET FAIR
Exhibition Center
Lodz, Poland
Organiser: Lodz Int'l Fair Ltd
Vl. Sienkiewiczca 85/87
90-057 Lodz
Poland
Tel: (4842) 372934
Fax: (4842) 372935

ANIMALIA
Beaulieu Congress and
Exhibition Centre
Lausanne
Switzerland
Organizer: Société Coopérative
du Comptoir Suisse
P.O. Box 89, Beaulieu,
CH-100 Lausanne 22
Switzerland
Contact: Mr Alexander Glauser
Tel: (4121) 6432111
Fax: (4121) 6437111

ANIDO
CV de Hallen Kortrijk
216, Doorniksesteenweg
B-8500 Kortrijk
Belgium
Tel: (3256) 204000
Fax: (3256) 217930

SIZOO Int'l Pet Show
Barcelona, Spain
Organizer: Fira de Barcelona,
Avda. Reina María Cristina
E-08004 Barcelona
Spain
Tel: (343) 4233101
Fax: (343) 4266025

DIBEVO
Postbus 94
3800 AB Amersfoort
Netherlands
Tel: (3133) 550433
Fax: (3133) 552835

EUROZOO
Postbus 1318
3800 BH Amersfoort
Netherlands
Tel: (3133) 947672/950640
Fax: (3133) 945886

INTERZOO
Nürnberg Messe GmbH
Nürnberg
Germany
Tel: (49911) 86060
Fax: (49911) 86060-228

ZOOMARK
Vimax srl
Via Rezzo Nico
22100 Como
Italy
Tel: (3931) 301059
Fax: (3931) 301418

PETINDEX
9, Tufton Street
Ashford, Kent TN23 1QN
United Kingdom
Tel: (441233) 621877
Fax: (441233) 645669

APPMA's NATIONAL TRADE SHOW
New Orleans, Louisiana, United States
Organizer: APPMA
511 Harwood Building
Scarsdale, NY 10583
United States
Tel: (914) 4721103

WWPSA
Long Beach Convention Center
Long Beach, California
United States
Organizer: WWPSA
406 S. First Avenue Arcadia
Pasadena, CA 91006-3829
United States
Tel: (818) 447222
Fax: (818) 4478350

INTERNATIONAL PET EXPO
Sands Exposition Center
Las Vegas, Nevada, United States
Organizer: International Pet Expo Inc.
c/o WWPSA (see above)

PET EXPO
Radisson Hotel
Melbourne
Australia
Tel: (613) 98962899
Fax: (613) 98963521

AQUARAMA
World Trade Center
Singapore
Organizer: Expoconsult
Pte Ltd, 100 Beach Road
26-00 Shaw Towers
Singapore
Contact: John Neo, Linda Tan,
Radhika Ojha
Tel: (65) 2999273
Fax: (65) 2999782

B. Trade magazines

PETS EUROPE
P.O. Box 1318
3800 BH Amersfoort
Netherlands
Tel: (3133) 33947672/950640
Fax: (3133) 945886

Animal Distribution
B.P. 30
75811 Rambouillet Cedex
France
Tel: (331) 34847060
Fax: (331) 34847055

ZZF
P.O. Box 1420
56070 Langen
Germany
Tel: (496103) 54166
Fax: (496103) 21087

HobbyZoo
Viale Milton, 7
50129 Firenze
Italy
Tel: (3955) 473843
Fax: (3955) 499195

Animalerie
54, rue Fbg-Poissonnière
F-75009 Paris
France
Tel: (331) 47709462
Fax: (331) 45233681

Animalia
Ave. Paralel 180
08015 Barcelona
Spain
Tel: (343) 3255350
Fax: (343) 4235499

Pet Business World
9, Tufton Street
Ashford, Kent TN23 1QN
United Kingdom
Tel: (441233) 621877
Fax: (441233) 645669

Pet Product Marketing
Bretton Centre
Bretton, Peterborough PE3 8DZ
United Kingdom
Tel: (441733) 246666
Fax: (441733) 265515

C. Associations

OFI
Ornamental Fish International
P.O. Box 445
Corsham, Wiltshire
United Kingdom
Tel: (441225) 810084
Fax: (441225) 811215

EPO
European Pet Organization
Postfach 1420
56070 Langen
Germany
Tel: (496103) 54166
Fax: (496103) 21087

Dyrehandlernes Brancheforening
Lyngby Hovedgade 80
2800 Lyngby
Denmark
Tel: (45) 42872071

Prodaf
59, rue Fbg-Poissonniere
75009 Paris
France
Tel: (331) 47709462
Fax: (331) 45233681

Zoobranches Riksförbundet
Ronnhagegatan 2
21459 Malmö
Sweden
Tel: (4640) 191770
Fax: (4640) 191770

PTIA
Bedford Business Center
Mile Road
Bedford MK42 9TW
United Kingdom
Tel: (441234) 273933
Fax: (441234) 273550

Appendix III

List of importers worldwide (this list is not exhaustive)

Austria

Zoo W Fischer
St Veitgasse 44/Topi
1130 Vienna
Tel: (43 1) 877 5832
Fax: (43 1) 877 9265

Satzfischzucht Hochleitner
Unterbrunnweg 3
6370 Kitzbuehel
Mobil Tel: (43 663) 85 9764

Brazil Import
Schubertstr. 15
4840 Voecklabruck
Tel: (43 7672) 7935
Fax: (43 7672) 27281

Belgium

Animales
Veerstraat 55
9031 Gent-Drongen
Tel: (32 9) 2262 210

Animaux sans Frontieres
Rue de la Meuse 44
1210 Brussels
Tel: (32 2) 427 3164, 427 427 475

Aquara Antwerp
De Borrekenslaan 90
2630 Aartselaar
Tel: (32 3) 887 6451
Fax: (32 3) 887 0117

Bva Aquatheek
Berlaarsestraat 11
2500 Lier
Tel: (32 3) 480 8520
Fax: (32 3) 488 0605

Dieltjens & Fils sprl
Antwerpseweg 209
2340 Vlimmeren
Tel: (32 3) 309 1182
Fax: (32 3) 312 0704

Fishcherie nv
Koerselsestcenweg 136
3582 Beringen
Tel: (32 11) 428 408
Fax: (32 11) 435 764

Fish Farm Vanstalle
Kloosterdam, 1-7
1850 Grimbergen
Tel: (32 2) 269 2621
Fax: (32 2) 269 2622

Fr. Deckers
Slekhoevevelden 1
2860 St Katelijne-Waver
Tel: (32 11) 5 313 136

Huybrechts
Beukenlaan 82
2980 Zoersel
I.A.T.
Tel: (32 33) 83 0747
Fax: (32 33) 84 3473

Intern. Swap Network
Quai Danemont 16
1000 Brussels
Tel: (322) 520 3307

Koi & Goldfish Farm SA
1, Chemin de la Guenette
1400 Nivelles
Tel: (32 67) 220 601

New Glassurel sprl
rue des Loups 15
1070 Brussels
Tel: (32 2) 5 20 6987

PISCIMEUSE
Chemin de la Justice, 8b
4500 Tihange
Tel: (32 85) 234 505
Fax: (32 85) 236 091

Tropical Aquarium sprl
392, Chaussee de Ledelinsart
6060 Gilly
Tel: (32 71) 42 2023

Tropicarium - Import Bvba
 Brockstraat 248
 9220 Hamme
 Tel: (32 52) 472 194
 Fax: (32 52) 477 428

Van de Put Fres
 Boomsteeg 40
 3520 Zonhoven
 Tel: (32 11) 814 086
 Fax: (32 11) 816 492

Vergauwen Urbain
 14 rue Moies
 4280 Hannot
 Tel: (32 19) 512 769

Surmont Storma
 Ghiselstraat 61
 8870 Izegem
 Tel: (31 51) 303 399

New Brussel Aquarium
 39, Blvd Barthelemy
 Brussels
 Tel: (32 2) 512 8266
 Fax: (32 2) 513 9278

Denmark

CREDO FISH
 Amalienborgvej 13
 9400 Norresundby
 Tel: (45) 981 90155
 Fax: (45) 9886 9129

Danish Aquar. Fishes & Research
 Ryesgade 19C
 52100 Copenhagen
 Denmark
 Tel: (45) 31 354 009
 Fax: (45) 31 354 019

Etheg Copenhagen
 Viskumvej 3
 2770 Kastrup
 Denmark
 Tel: (45) 32 506 834

Rebaek Aquarium
 Rebaek Sopark 1, Box 13
 2650 Hvidovre/Copenhagen
 Denmark
 Tel: (45) 31 474 725

Erik Sirak
 Lursensvej 28
 2950 Vedbæk
 Tel: (45) 42 893 439

Aqua En Gros
 Bogensevej 17A
 5270 Odense N
 Tel: (45) 66 181 272

Aquafarm Aps
 Mejeribakken 3, Gronfeldt
 8400 Ebeltoft
 Tel: (45) 86 365 5433
 Fax: (45) 86 365 004

Dansk Tropefisk Aps
 Hjaltesvej 14 Voel
 8600 Silkeborg
 Tel: (45) 86 853 087
 Fax: (45) 86 853 327

Traenks Tropicals
 36, Gammelgaardsvej
 2730 Herlev
 Tel: (45) 429 10 772
 Fax: (45) 4291 9057

Tropica Aquarium Plants Aps
 P.O. Box 3 DK 8530
 Hjortshoj
 Tel: (45) 86220 566
 Fax: (45) 8622 8466

Finland

Akvaario Elo Oy
 Asunvainionkatu 3
 33720 Tampere
 Tel: (358 31) 75 311

Akvaario Piekkala
 PL12, Tikantie 14B
 04321 Riihikallio
 Tel: (358 27) 31241
 Fax: (358 27) 31208

Turun Akvaario
 Mr. R. Laakso
 Kaarningonkatu 18
 20720 Turku
 Tel: (358 21) 365 500
 Fax: (358 21) 365 976

Kapteenin Lintukuuppa
Uudenmaankatu 27
00120 Helsinki
Tel: (358 0) 852 3383

Suomen Akvaariopalvelu Oy
Kyntäjantie 20 B
00390 Helsinki
Tel: (358 0) 787 320
Fax: (358 0) 787 1570

France

Oceania
12, rue Gérard de Nerval
77280 Othis
Tel: (33 1) 6003 9000, 6003 5315
Fax: (33 1) 6003 1157

Le Paradis du Midi
68, Ave de Toulouse
34070 Montpellier
Tel: (33) 67424250

Earl La Ferme Aquatique
Christopher J. Decorte
2 rue d'Avelette
66232 Hinges
Tel: (33) 212 79918
Fax: (33) 212 6073

Piscikoi
1, rue de la Poulrière
27160 La Gueroulde
Tel: (33) 32297 367
Fax: (33) 32354 267

L'Exotarium
208, rue Garibaldi
69003 Lyon
Tel: (33) 78608 506

Dourdan Exotique
14 rue de l'Ouye
91410 Dourdan
Tel: (331) 645 96949

Pisciculture Haegel S.A.
Rue du Commerce/ZI Forlen
67118 Geispolsheim
Tel: (33) 88663186
Fax: (33) 88673542

Sodam s.a.r.l.
B.P. 10238
Rue de Jeune fille
95700 Roissy en France
Tel: (33 1) 6862 6970

Décor Exotique
22, rue Eugène Varline
75010 Paris
Tel: (33 1) 4209 0746

Sidoli Difusion
ZI des Richardes
93160 Noisy le Grand
Tel: (33 1) 4209 0746

Aqua Floral
43, route du Général de Gaulle
67300 Schiltigheim
Tel: (33) 88622 974
Fax: (33) 88835 890

Avifauna
23 rue Véron
75018 Paris
Tel: (33 1) 42 586 940

Aquarium Tropical
9, rue du Hagelbach
68260 Kingersheim
Tel: (33) 8953 7272
Fax: (33) 8953 8323

Au Bengali
1, rue de l'Argilière
80110 Mézieres en Santerre
Tel: (33) 2294 9194
Fax: (33) 2294 9192

Nerea Aquarium
Rue des Près
77178 Oissery
Tel: (33 1) 6001 0403

Volières et Aquariums
9, rue de Vernouillet
28100 Dreux
Tel: (33) 37465 047
Fax: (33) 37628 694

Germany

Aquarium Fritz
Muller
Dieselstr. 9
30916 Isernhagen NB
Tel: (49 511) 773 069
Fax: (49 511) 774 778

Aquarium Glaser Germany
Ulrich Glaser
Liebigstrasse 1
63110 Rodgau 6
(Weiskirchen Industrial Estate)
Tel: (49 6106) 69010
Fax: (49 6106) 690 160/690 162

Aquarium Munster
Pahlsmeier GmbH
Galgheide 8
48291 Telgte
Tel: (49 2504) 93040
Fax: (49 2504) 930420

Aquarium Rio Nachf.
Aquaprint Verlags GmbH
Heiko Bleher
Darmstadter Landstr, 3b
63329 Egelsbach
Tel: (49 6103) 42303
Fax: (49 6103) 45201

Eheim GmbH
P.O. Box 1180
73779 Deizisau
Tel: (49 7153) 700 201
Fax: (49 7153) 700 210

Ingo Pet Fischhof
Ammerreuth 1
94501 Walchsing
Tel: (49 85) 47 413
Fax: (49 85) 47 1665

Juwel Aquarium GmbH
& Co. Kg
Waldweg 10
27356 Rotenburg (Wumme)
Tel: (49 4261) 5091
Fax: (49 4261) 5096

Rebie
Paulusstr 43
33602 Bielefeld
Tel: (49 521) 65402
Fax: (49 521) 62811

Tetra Werke
P.O. Box 1580
Melle
Tel: (49 5422) 1050
Fax: (49 5422) 42985

FiMo Aquaristic GmbH
Hueckerstrasse 113
32257 Buende
Tel: (49 5223) 188 840

Cichliden Centrum
Belich, 15
50259 Pulheim - Stommeln
Tel: (49 2238) 13488

Zierfischzuechtere J. Christ
Steinfurther Allee 41
22117 Hamburg 74
Tel: (49 40) 712 2169
Fax: (49 40) 712 2088

Aquarium Dietzenbach
Von Hevesy Strasse 1a
63128 Dietzenbach 2
Tel: (49 6074) 28281

Tagis Aquarium
Postfach 201 140
63271 Dreieich 2
Tel: (49 6103) 64036

Allgauer Zierfischzuechtere
Weiherstr. 22
87779 Trunkelsberg/Memmingen
Tel: (49 8331) 5580

Aquafarm Ryba
Tannenkamp 12
27404 Zeven
Tel: (49 4281) 3001

Aquarum Rio GmbH
Darmstadter Landstrasse 3b
63329 Egelsbach
Tel: (49 6103) 42303

Quality Fish Import
von Hevesy Strasse 1B
63128 Dietzenbach
Tel: (49 6074) 27051
Fax: (49 6074) 33640

Aquarium Nollmann GmbH
Vennhofallee 74
33689 Bielefeld 11
Tel: (49 5205) 21512

Tech Aquarium
Bergstrasse 7
73266 Ochsenwang (Stuttgart Ulm)
Tel: (49 7023) 6512

Aquarium Watermann
Virchowstrasse 54
26382 Wilhelmshaven
Tel: (49 4421) 43551

Gula Aquaristic KG
Ludwigsburger Steige 119
71686 Remseck 2
Tel: (49 7146) 7804

TSI GmbH
Suechtelner Strasse 5
41747 Viersen 1
Tel: (49 2162) 17025

Aquarium Suedheide KG
Orchideenweg 1-7
29313 Hambuehren 1
Tel: (49 5084) 4523
Fax: (49 5084) 4255

Malawi Tanganjika Aquarium
Weimarer Str. 14
41472 Neuss-Holzheim 22
Tel: (49 2131) 461 900

Aquatop, Grohs & Heuser
Mauerstr. 6
52223 Stolberg
Tel: (49 2402) 240 39

Afrik Aquarium Haltern
Lavesummerstrasse 57
45663 Haltern Sythen
Tel: (49 2361) 372 597

Tranfish GmbH
Robert Koch Str. IC
82152 Planegg
Tel: (49 8985) 93847

Reichert Zierfisch Service
Falkenweg 24
37431 Bad Lauterberg/Harz
Tel: (49 5524) 6477

Fischzucht H. Gross
Kirchring 2
36093 Dietershausen
Tel: (49 6656) 322
Fax: (49 6654) 277

Planfisch International GmbH
Postfach 140
91550 Dinkelsbuehl
Tel: (49 9851) 3089
Fax: (49 9851) 1383

Zierfisch-Import & Grosshandel
Hauptstrasse 109
66978 Clausen
Tel: (49 6333) 5743
Fax: (49 6333) 5743

Greece

Aquarium Patras
29 Gotsi Street
26223 Patras
Tel: (30 61) 22 6588
Fax: (30 61) 22 6784

Aquatica
328, Vouliagmenis Avenue
17342 Athens
Tel: (30 1) 896 1408

Italy

Acquario Nettuno
Via S. Onofrio, 25/B
41043 Formigine (Modena)
Tel: (39 59) 570 105
Fax: (39 59) 573 158

Animal's House
Via Prati Fiscali, 263
00141 Roma
Tel: (39 6) 886 3645
Fax: (39 6) 886 3645

Aquarist
Via de Panfili, 43/45
00121 Ostia Lido (Roma)
Tel: (39 6) 5694 258
Fax: (39 6) 5694 258

Aquarium Centre
Via Po Zona Dragonara
65100 Pescara
Tel: (39 85) 4460 197
Fax: (39 85) 4460 197

Fish House
Via Gritti, 69
31050 Visnadello (Treviso)
Tel: (39 422) 444 140
Fax: (39 422) 444 153

Fish House
Via Telemaco Signorini, 9
20092 Cinisello Balsamo (Mi)
Tel: (39 2) 6601 1498
Fax: (39 2) 6601 1498

Mondo Sommerso
Via Lucania, 8
84100 Salerno
Tel: (39 89) 753 159

Car Mar
Via A. Moro, 28
800046 San Giorgio Cremano (Na)
Tel: (39 81) 574 3496
Fax: (39 81) 574 3496

COF di Campanini Maria
Circonvallazione Ponente, 35
40066 Pieve di Cento (Bologna)
Tel: (39 51) 975 366
Fax: (39 51) 975 462

Euraquarium
Via Emilia Levante, 144
40139 Bologna
Tel: (39 51) 544 108/543 677
Fax: (39 51) 491 704

Faro Aquarium
Via Palestro, 10
20092 Cinisello Balsamo (Mi)
Tel: (39 2) 6601 0205
Fax: (39 2) 6601 0205

Seabox Aquarium
Via S. Martino, 43
55049 Viareggio (Lucca)
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10123 Torino
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Tropical Zoo
Viale IV Novembre, 13
00043 Ciampino (Roma)
Tel: (39 6) 791 4106
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Oswaldo Bulichelli
Corso Mazzini, 180
57126 Livorno
Tel: (39 586) 888 353
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Prodac
Via Vegra, 16
35013 la Cittadella (Padova)
Tel: (39 49) 5971 113
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Zeus Aquarium
Via Regina Margherita, 18/20
09100 Cagliari
Tel: (39 70) 669 347
Fax: (39 70) 669 534

Netherlands

Aqua Trade International
Postbus 4812
5953 ZL Reuver
Tel: (31 4704) 3882
Fax: (31 4704) 5414

De Jong Marinelife BV
Spijksesteeg 2 a
4212 KG Spijk (Lingewaal) ZH
Tel: (31 18) 313332
Fax: (31 18) 311548

Aquarium Boonstra
Bos en Lommerweg 112-114
1055 ED Amsterdam
Tel: (31 20) 68 22176
Fax: (31 20) 68 6864825

DEP International
Johan de Witstraat I
4902 VG Oosterhout
Tel: (33162) 224 33
Fax: (33162) 224 33

De Aquariaan
Soestdijksekade 407
2574 BA Den Haag
Tel: (31 70) 321 0011
Fax: (31 70) 321 3131

Gommers-Ducheine
Willem Alexanderstraat 15
6691 EE Gendt
Tel: (31481) 124600
Fax: (31481) 645815

Heja Import-Export
Jan Peterstraat 53
6116 BC Roosteren
Tel: (31 44) 994 098
Fax: (31 44) 994 025

Jarathana BV
Platinastraat 56
8211 AR Lelystad
Tel: (31 32) 0042 484
Fax: (31 32) 0027 623

M.B. Rujsbroek bv
Noordvliet 159
3142 CL Maassluis
Tel: (311899) 15955
Fax: (311899) 12986

Matyi C.V.
Postbus 4641
4803 EP Breda
Tel: (31 76) 654 180
Fax: (31 76) 654 163

Holland Koi Import
Rijndijk 259 B
2394 CE Hazerswoude-Rijndijk
Tel: (31 17) 1415892
Fax: (31 17) 1415650

Fa. Willemsen
Postbus 9082
1006 AB Amsterdam
Tel: (31 20) 6109 047
Fax: (31 20) 6109 057

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Rivierdijk 27a
3372 BE Hardinxveld-Giessendam
Tel: (31 18) 6413655
Fax: (31 18) 64 16791

Gevo
De Spaarpot 24
5667 KX Geldrop
Tel: (31 40) 855505
Fax: (31 40) 853075

Ruinemans Aquarium BV
Postbus 44
3417 ZG Montfoort
Tel: (31 34) 842004
Fax: (31 34) 844299

Sierviskwererij Waterweelde
Escampaan 67
2547 GB Den Haag
Tel: (31 70) 323 8941
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Aquaflora Aquarium
Herenweg 125
3645 DJ Vinkeveen
Tel: (31 2972) 61861
Fax: (31 2972) 62250

Aquarium Sport
Pinjnacker B.V.
Klapwijkseweg 8
2642 RC Pijnacker
Tel: (31 1891) 13033
Fax: (31 1891) 18079

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Postbus 77
3870 CB Hoevelaken
Tel: (31 342) 62098/349 537 245
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Spijksesteeg 2a
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Fax: (31 1831) 1548

Dutch Air B.V.
Hoeksteen 157
2132 MX Hoofddorp
Tel: (31 20) 655 2444
Fax: (31 20) 653 4115

Groothandel Smulders B.V.
Postbus 1022
6235 ZG Ulestraten
Tel: (31 43) 642 387
Fax: (31 43) 645 815

Handels Onderneming
Gebr. de Boon B.V.
Riviedijk 27a
3372 BE Hardinxveld-Giessendam
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Fax: (31 43) 01846 16791

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5667 KX Geldrop
Tel: (31 4085) 5505
Fax: (31 4085) 3075

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 Noordvliet 159
 2142 CL Maassluis
 Tel: (31 1899) 15955
 Fax: (31 1899) 12986

Ruinemans Aquarium B.V.
 Ijsselveld 9
 P.O. Box 44
 3417 ZG Montfoort
 Tel: (31 3484) 72004
 Fax: (31 3484) 74299

Ruto Frozen Fish Food B.V.
 Nijverheidscentrum 44
 2761 JP Zevenhuizen
 Tel: (31 1802) 3327
 Fax: (31 1802) 3379

Verduijn Cichlids
 Wollefoppenweg 107
 2761 DL Zevenhuizen
 Tel: (31 1045) 50253
 Fax: (31 1045) 66738

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Aquamundo Peixes Tropicais
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 4000 Porto
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Carlos Nunes da Silva
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 Fax: (34 3) 225 1792

Ibertropic S.A.
 Paris 124
 Barcelona 36
 Tel: (34 3) 439 1849/322 4912
 Fax: (34 3) 410 8543

P & S, S.L.
 CTRA N-152 KM 24,4
 08185 Lliga de Vall
 Tel: (34 3) 849 4933
 Fax: (34 3) 849 3688

Promotora Bama
 c/Casanova, 201 1 1a
 08036 Barcelona
 Tel: (34 3) 419 1265
 Fax: (34 3) 419 2762

TD Acuariofilia: Torregrosa Dumuid S.L.
 Avda. País Valenciano, 102
 03140 Guardamar, Alicante
 Tel: (34 6) 572 9602/572 9682
 Fax: (34 6) 572 7817/671 9334

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 Fax: (46 8) 583 55219

Aquafisk
 Holmgatan 8
 37138 Karlskrona
 Tel: (46 455) 10746

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A 1 Garden Cattery
 Cross Lane
 Winterley
 Doncaster DN93NT
 Tel: (44 1302) 771 667

A 5 Aquatics
 Watling Street
 Nuneaton CV11 6BG
 Tel: (44 1992) 815 001

Avon Aquatics
 BT Foden Aquarist Aquarium
 93 Thornhill Road
 Longwood, Huddersfield, HD3

Barton Water Gardens
 Barrow Road
 Barton on Humber
 Tel: (44 1652) 660 291

Barracough Fish and Aquarium Supplies
 Haycliffe Lane, Bradford
 West Yorkshire BD5 9ET
 Tel: (44 1274) 576 241
 Fax: (44 1274) 521 245

Beaver Water Plants & Fish Farm
Wayland Farm, Approach Road
Westerham, Kent TN 16 2JT
Tel: (44 1959) 577 747

Belton Fish Farm Ltd
The Turbary
Belton
Nr. Doncaster
South Yorks DN9 1PL
Tel: (44 1427) 872 615
Fax: (44 1427) 872 373

Benair Freight Ltd
Building 301 Cargo Centre,
Manchester Int. Airport
Altrincham
Cheshire WA15 8UX
Tel: (44 161) 436 2277
Fax: (44 161) 436 1670

Blagdon Water Gardens
Bath Road
Upper Langford, Avon
Tel: (44 1934) 852 973

Chandler Cross Boarding Kennels
Chandler Cross, Potten House
Rickmansworth, Herts
Tel: (44 1923) 260 182

C. Murray Aquatics (Scotland)
55 Washington Street
Glasgow G3 8AZ
Scotland
Tel: (44 141) 204 2345
Fax: (44 141) 204 3211

Coral Reef Technology Ltd
62 High Road, Byfleet
Surrey KT14 7QL
Tel: (44 1932) 355 121
Fax: (44 1932) 349 718

Cyrio Ltd
Hards Road
Frognall
Deeping St. James
Peterborough
Tel: (44 1733) 344 502
Fax: (44 1733) 348 093

Dawngame Ltd
115/117 Maybank Road
South Woodford
London E18 1EJ
Tel: (44 181) 559 0897
Fax: (44 181) 559 2657

English Water Gardens
London Road A 24
Washington, W. Sussex RH20 3BL
Tel: (44 1903) 892 408
Fax: (44 1903) 892 006

Fanday Aquatic Imports Ltd
Brandhealth Lane, New End
Redditch, Worcs B96 6NQ
Tel: (44 1527) 822 975
Fax: (44 1527) 893 001

Golden Phoenix Fish Farm
Bank End Road, Finningley
Doncaster DN9 3NT
Tel: (44 1302) 771 667

Harrow Koi Co.
269 Watford Road
Harrow, Middlesex
Tel: (44 181) 4230 208
Fax: (44 181) 4238 899

Glenkrag
Unit 7E, Kilroot Park
Carrickfergus
Co Antrim BT38 7PR
Northern Ireland
Tel: (44 19603) 51491
Fax: (44 19603) 51920

Hozelock Aquatics
Haddenham
Aylesbury
Bucks HP178JD
Tel: (44 1844) 291 881
Fax: (44 1844) 290 344

JMC Aquatics Ltd
59 Stubley Lane, Dronfield
Sheffield, Yorkshire S18 SPG
Tel: (44 114) 415 275
Fax: (44 114) 290 236

Kent Koi Ko
London Road, Badgers Mont
Sevenoaks, Kent TN 14 7AY

Kindler Aquatics
Stoke Place Farm
Stoke Poges, Bucks SL2 4NL
Tel: (44 1753) 692 595

Koi Central
Unit 20 Trinity
Trading Est Tribune
Sittingbourne, Kent
Tel: (44 1795) 477 227

Koi Kraft
Mount Pleasant Farm
Brishing Road
Chart Sutton, Maidstone, Kent
Tel: (44 1622) 743 413

Langleys Aquatic
Langleys Farm
Dunmow, Essex
Tel: (44 1279) 876 245
Fax: (44 1279) 876 628

London Aquatic Co. Ltd
Greenwood Nurseries
Theobald Park Road
Enfield, Middlesex
Tel: (44 181) 3664 143

Neil Hardy Aquatica Ltd
Woodmansterne Lane
Carshalton, Surrey SM5 4DQ
Tel: (44 181) 773 2731
Fax: (44 181) 773 2035

New World Aquatic
Distributors
Cardiff Road, Glan-y-llyn
Taffs Well, Cardiff CF4 7QQ
Tel: (44 1222) 810 663

Ornamental Fish Consolidators
371 High Street
Harlington, Hayes UB3 5DQ

Paradise Tropical Fish Importers
8 St. Georges Estate, St Ouen
Jersey, Channel Islands
Tel: (44 1534) 483 659
Fax: (44 1534) 483 659

Paul Barraclough
Hayfield Mills
Bradford, W. Yorkshire BD5 9ET
Tel: (55 1274) 576 241

Peter Golding Limited
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Hampshire SO21 3QL
Tel: (44 1962) 760 792
Fax: (44 1962) 760 692

Pisces Aquaculture Ltd
Courtaulds, P.O. Box 5
Spondon, Derby DE21 7BP
Tel: (44 1332) 681 399
Fax: (44 1332) 681 806

Pisces Aquaculture Tewin Ltd
Tewin Mill Fish Farm, Kingsbridge
Tewin, Nr Welwyn, Herts AL6
Tel: (44 1438) 718 558

Prestopets
Weald Bridge Nursery
Kents Lane, North Weald
Essex CM16 6AX
Tel: (44 1992) 522 421
Fax: (44 1992) 522 559

Purity on Tap Ltd
Wickfield Farm House
Shefford Woodlands
Newbury, Berks, RG16 7AL
Tel: (44 1488) 648 319
Fax: (44 1488) 648 997

Quality Koi Company
Bridge End
Sugden Memorial Hall
Brighouse, W. Yorkshire
Tel: (44 1484) 722 015

RJ Aquatics
102 Station Road
Bardney, Lincolnshire LN3 5UF
Tel: (44 1526) 398 440

RJ Whitwell Fish Hatcheries
11 Lexden Rd. West Bergholt
Colchester, Essex CO6 3BU
Tel: (44 1206) 240 223

Swallow Aquatics
London Road, Rayleigh
Essex SS6 9ES
Tel: (44 1268) 781 265
Fax: (44 1268) 782 334

Tewin Mill Fish Farm and Fisheries Ltd
 Martin Symonds
 Kingsbridge, Tewin
 Nr. Welwyn Herts, AL6 0LJ
 Tel: (44 1438) 716019/718558
 Fax: (44 1438) 840096

Tropical Marine Centre Limited
 Solesbridge Lane
 Chorleywood
 Herts WD3 SSX
 Tel: (44 1923) 284151
 Fax: (44 1923) 285840

Tropical Waters
 Unit No. 2 St. Lawrence
 Buss. Centre
 Victoria Rd., Feltham
 Middlesex TW 13 2LT
 Tel: (44 181) 7510 337/7511 634

Valley Aquatics
 Flip Road
 Haslingden, Lancs BB4 5EJ
 Tel: (44 1706) 224 370

Viking Aquatics
 27-31 St. Margaret's Street
 Ipswich IP4 2AT
 Tel: (44 1473) 212 234

Waterlife Research Industries Ltd
 Bath Road, Longford
 West Drayton
 Middlesex UB7 OED
 Tel: (44 1753) 682487/685696
 Fax: (44 1753) 685437

Waterworld Limited
 Chester High Road, Burton
 South Wirral L64 8TC
 Tel: (44 151) 336 7718

Waveney Fish Farm Ltd
 Park Road
 Diss, Norfolk IP22 3AS
 Tel: (44 1397) 642 697/652 226
 Fax: (44 1397) 651 315

Wessex Fish Farms
 Water Lane Fish Farm
 Burton Bradstock, Bridport
 Dorset, DT6 4NE
 Tel/Fax: (44 1308) 897 685

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Far East Enterprise Inc.
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 12-10 Kokubu-cho, Tennoji-ku
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Kamihata Fish Industries Ltd
 1330 Amado-Cho
 Chiba City 281
 Tel: (81 472) 57 5344
 Fax: (81 472) 50 0475

Nippon Aquarium Co. Ltd
 3-22-11 Machiya Arakawaku
 Tokyo 116
 Tel: (81 3) 3892 9421
 Fax: (81 3) 3892 9425/3892 9439

Ornament Fish Kansai Co. Ltd
 3-4-18 Nakano-cho
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 Osaka 534
 Tel: (81 6) 353 3003
 Fax: (81 6) 353 3006

Osaka Aquarium Ltd
 8-1, 6 chome, Satanakamachi
 Moriguchi
 Osaka
 Tel: (81 96) 905 6812
 Fax: (81 96) 905 8540

Yutaka Shoji Co. Ltd
 5-13 5 chome
 Higashikohziya
 Ohta-Ku
 Tokyo
 Tel: (81 3) 3745 3051
 Fax: (81 3) 3745 5200

United States

Dolphin International Ltd
 1125 W. Hillcrest Blvd
 Inglewood, CA 90301
 Tel: (1 310) 645 2046
 Fax: (1 310) 337 1393/337 2829

EKK Will Water Life Resources
7502 Symmes Road
Gibsonton, FL 33534
Tel: (1 813) 677 5475
Fax: (1 813) 677 1542

Emark Tropical Imports Inc
2302 Voorhies Avenue
Brooklyn, NY 1235
Tel: (1 718) 769 8600
Fax: (1 718) 934 7752

Empire Fisheries
102 Charlton Street
New York, NY 10014
Tel: (1 212) 741 1023/718 845
Fax: (1 212) 627 8608/718 845

Fish Mart
28 Richard Street
West Haven, CT 06516
Tel: (1 203) 937 7387
Fax: (1 203) 937 9865

5D Tropical Inc
6507 Bob Head Road
Plant City, FL 33565
Tel: (1 813) 986 4560/2803/3988
Fax: (1 813) 986 6792

Florida Aquatic
Nurseries, Inc
700 S. Flamingo Road
Fort Lauderdale, FL 33325
Tel: (1 305) 472 5120
Fax: (1 305) 472 5446

International Fisheries, Inc
2290 W 77th St
Hialeah, FL 33016
Tel: (01 305) 825 0475
Fax: (01 305) 825 1671

International Fisheries, Lax Inc.
5200 W 104th Street
Los Angeles, CA 90045
Tel: (01 310) 417 3474
Fax: (01 310) 338 1196

NAF (North American Fish) Network
8681 Pequaywan Lake Rd
Duluth, MN 55803
Tel: (01 218) 848 2226
Fax: (01 800) 901 2226

Old World Exotic Fish Inc
P.O. Box 970583
Miami, FL 33197
Tel: (01 305) 248 6640
Fax: (01 305) 245 4228

Segrest Farms
6180 Big Bend Road
Gibsonton, FL 33534
Tel: (01 813) 677 9196
Fax: (01 813) 677 4448

Shady Acres Turtle Farm
P.O. Box 267
Ferriday, LA 71334
Tel: (01 318) 757 4761
Fax: (01 318) 757 2446

Surinam Tropical Fish Dist. Inc.
2565 NW 74th Avenue
Miami, FL 33122
Tel: (01 305) 477 2557
Fax: (01 305) 594 7502