

Sea Fish Industry Authority : University of Hull
Joint Study

The
Inland Wholesale
Fish Markets

1. The Inland Markets Survey

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David Symes

PREFACE

This report is one of a series that forms the first stage in a Joint Study of the inland wholesale fish markets in Great Britain, undertaken by Sarah Maddock (Humberside College of Higher Education), John Tower (Seafish) and David Symes (University of Hull). Each report describes the situation at a single market (or, in the case of the Small Markets, a group of five markets). A Summary Report represents the information for all markets in a consolidated and comparable form and a Retail Survey report is being prepared from around 400 responses to a questionnaire distributed through the Sea Fish Standard.

The initial purpose of these reports is to provide the basis for an informed discussion of the situation confronting the inland markets towards the end of the 1980s. We should, therefore, be very grateful to receive any comments, criticisms or suggestions from those who read any of the reports. A Final Report will be prepared after a further round of discussions with representatives from the inland markets has been completed.

Information contained in the report is based solely upon the results of questionnaires and from interviews conducted at the markets during July-October 1987 by members of the study team and assisted, from time to time, by other members of Seafish staff. It therefore represents the views and opinions of those most closely concerned with the inland markets - either as merchants or their customers. Except in the brief conclusions to the report we have refrained from interposing our own thoughts, though these will be more prominent in the Final Report. Analysis of the data and the drafting of the report was undertaken by David Symes at the University of Hull.

We should like to take this opportunity of expressing our thanks to all those who have taken part and whose interest in the project has done much to stimulate our own interest and enthusiasm.

David Symes,
January, 1988

THE INLAND WHOLESALE FISH MARKETS

1. THE INLAND MARKETS SURVEY

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BILLINGSGATE

BIRMINGHAM

GLASGOW

LIVERPOOL

MANCHESTER

SHEFFIELD

THE INLAND WHOLESALE FISH MARKET

1. THE INLAND MARKETS SURVEY

A1. INTRODUCTION

This report forms part of the Inland Wholesale Markets Joint Study, undertaken in response to a request from the National Federation of Inland Wholesale Fish Merchants. Originally the study was to focus upon the three major English markets at Billingsgate, Birmingham and Manchester, but was subsequently extended to include Liverpool and Glasgow and a number of smaller markets. It was the pilot survey at Sheffield which alerted the survey team to the particular problems of the small markets. The location of the inland markets included in the survey is indicated in Figure 1.

Interviews were conducted with 110 merchants between July and October 1987. At all markets, except Billingsgate, the aim was to get as close as possible to a complete coverage of all merchants; at Billingsgate a sample survey of approximately half the firms was attempted.

As a first stage in the analysis a series of Market Profiles, each analysing the situation at a particular market, has been produced, together with the present Summary Report. The hope is that these profiles will provide the basis for further discussion of the situation in the inland markets before proceeding to the preparation of the Final Report.

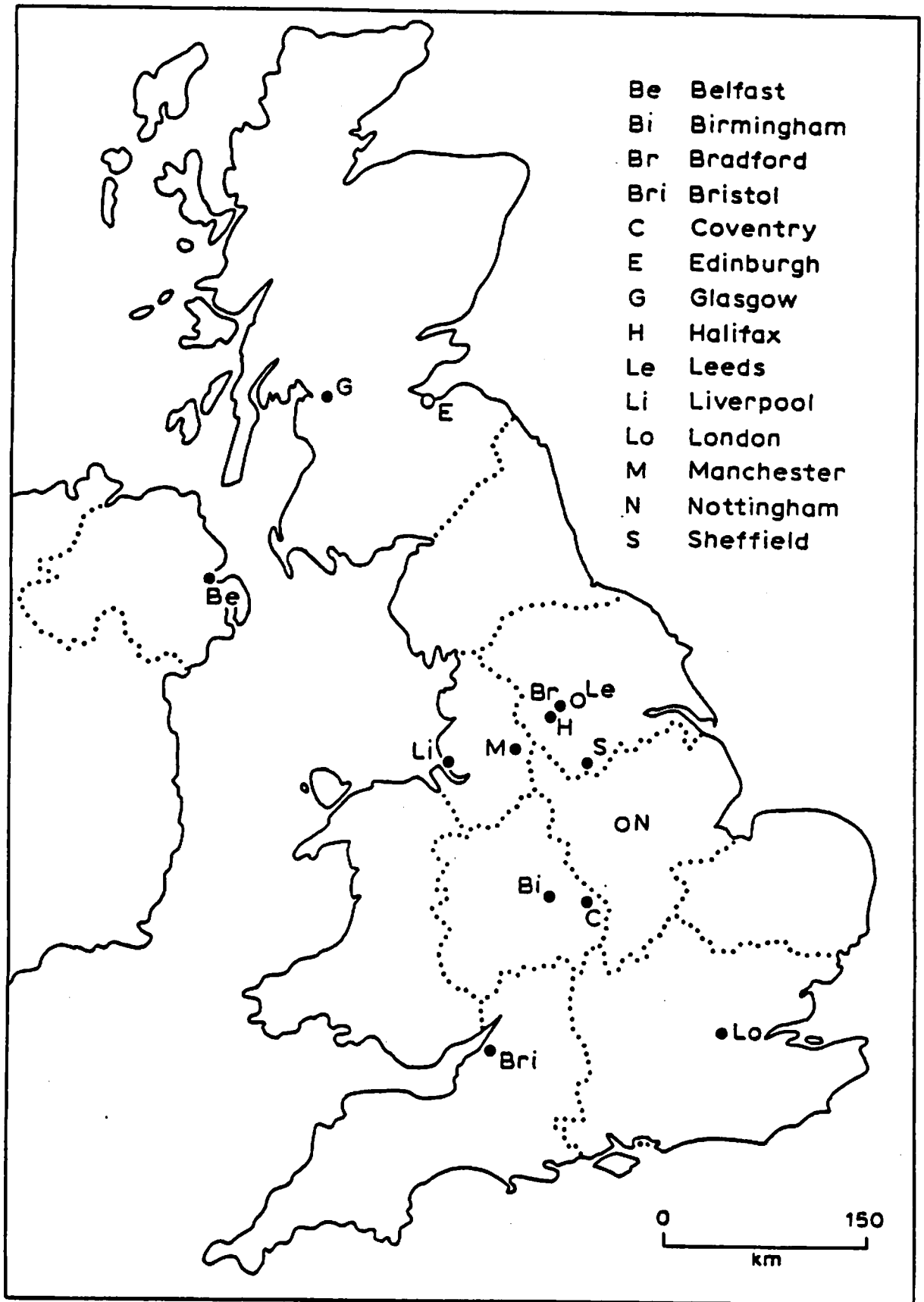


Fig. 1. The inland markets : solid circles indicate markets included in survey

B. THE STRUCTURE OF THE INLAND MARKETS

B2. TYPE OF FIRM

TABLE 1
TYPE OF FIRM AND NUMBER OF YEARS ON THE MARKET

	No. of years trading			No Answer	Total	
	10	10-25	Over 25		No.	%
Sole Trader	1	1	3	0	5	4
Family Partnership	1	6	12	1	20	18
Limited Co.	6	14	58	3	81	74
Subsidiary	1	1	1	1	4	4
Total	9	22	74	5	110	-
%	8	20	68	4	-	100

COMMENT

A consistent pattern was evident on all the markets of well-established firms now trading as limited companies or, less commonly, family partnerships accounting for a considerable majority of businesses. In both cases the business had frequently been handed down within the family over several generations. It was noticeable that very few firms had been formed within the last ten years. This lack of 'new blood' was regretted by some merchants who feared it would reduce the innovativeness and dynamism of the market.

Except at Billingsgate and probably Birmingham there was little evidence of a 'waiting list' of firms wishing to move onto the market from outside. As a result stands which became vacant on the dissolution of a firm were usually taken over by existing businesses wishing to expand or left empty.

Each profile follows a more or less standard format in which the main findings of the market survey are presented in tabulated form with a brief commentary (part B), together with a self-evaluation of the market's strength and weaknesses (parts C and D) and the authors' own preliminary conclusions. It should be noted that, with the exception of the short concluding section, all the opinions represented are those of the merchants themselves; they are not necessarily shared by the authors of the report.

The same format is followed in this Summary Report. Its aim is to present an overall picture for the inland markets as a whole and at the same time to indicate the differences between the six markets studied.

B3. SIZE OF FIRM : ANNUAL TURNOVER

TABLE 2

	Turnover £m					Total	Turnover £m	
	0.5	0.5-1.0	1.0-2.0	2.0+	N/A		Total	Av/firm
Billingsgate	3	6	14	9	5	37	71.8	1.94
Birmingham	2	2	6	3	4	17	21.8	1.28
Manchester	2	3	3	2	5	15	29.5	1.97
Liverpool	1	4	3	1	3	12	20.7	1.73
Small Markets	2	6	1	1	3	13	6.8	0.53
Glasgow	3	3	3	1	6	16	11.2	0.80
Total	13	24	30	17	26	110	161.8	1.47
%	12	22	27	15	24	100	-	-

COMMENT

Roughly 75% of firms were willing to provide an approximate statement of their annual turnover. This has proved a quick and effective method of measuring the size of business. Extreme difficulties were experienced during early attempts to gather information on the weights of fish handled by individual firms. Turnover data have been used later in the analysis to describe the proportions of trade allocated to different sectors (whitefish, pelagics, shellfish etc); to assess the relative importance of different types of customer; and to indicate the degree of localisation of the market's trade.

Each market revealed a very diverse structure of business size (see Figure 2) with estimated turnovers ranging from less than £500,000 to over £2.0 million. In general, the smaller the market (in terms of the number of firms trading) the greater the proportion of small firms i.e. those with turnovers less than £1.0m. Thus at Billingsgate only 28% of firms fell within this category whereas at the 'small markets' 80% of firms reported turnovers under £1.0m. At two markets - Manchester and Liverpool - the average sales are grossly distorted by the presence of a single very large firm whose individual turnover accounts for at least 45% of the market total.

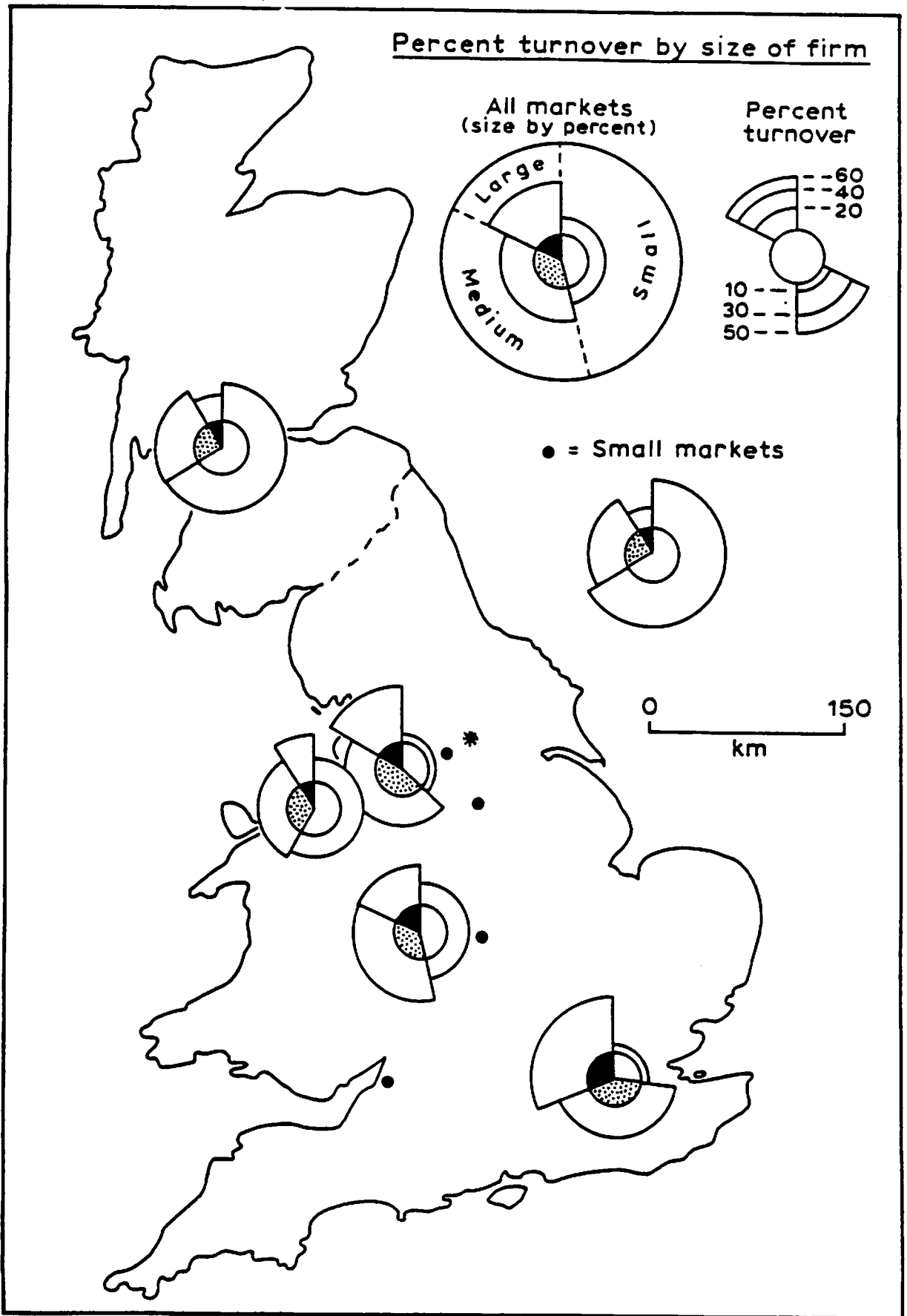


Fig. 2. Percentage turnovers by size of firm

It has been possible, on the basis of information collected in the course of the survey, to attempt an estimate of the total turnover for each market (see Figure 3). This has been arrived at by multiplying the total employment in firms on the market by an average figure for turnover/person employed, calculated from those figures where information on turnover was available. It must be stressed that the method of calculation is very crude and the resulting figures should be treated with great caution:

Billingsgate	£130m
Birmingham	£ 22m
Manchester	£ 30m
Liverpool	£ 21m
Glasgow	£ 15m
Small Markets	<u>£ 14m</u>
Total	£232m

TABLE 3
TREND IN TURNOVER

	Declining	Stable	Increasing	N/A	Total
Billingsgate	3	4	13	17	37
Birmingham	1	5	5	6	17
Manchester	1	0	8	6	15
Liverpool	1	3	6	2	12
Small Markets	4	7	2	0	13
Glasgow	3	6	3	4	16
Total	13	25	37	35	110
%	12	23	34	31	100

COMMENT

For slightly more than two thirds of firms interviewed it was possible to record information not only on annual turnover but also trends over the previous twelve months. Practically half those firms reported 'no change' and thus a relatively small proportion (20%) had

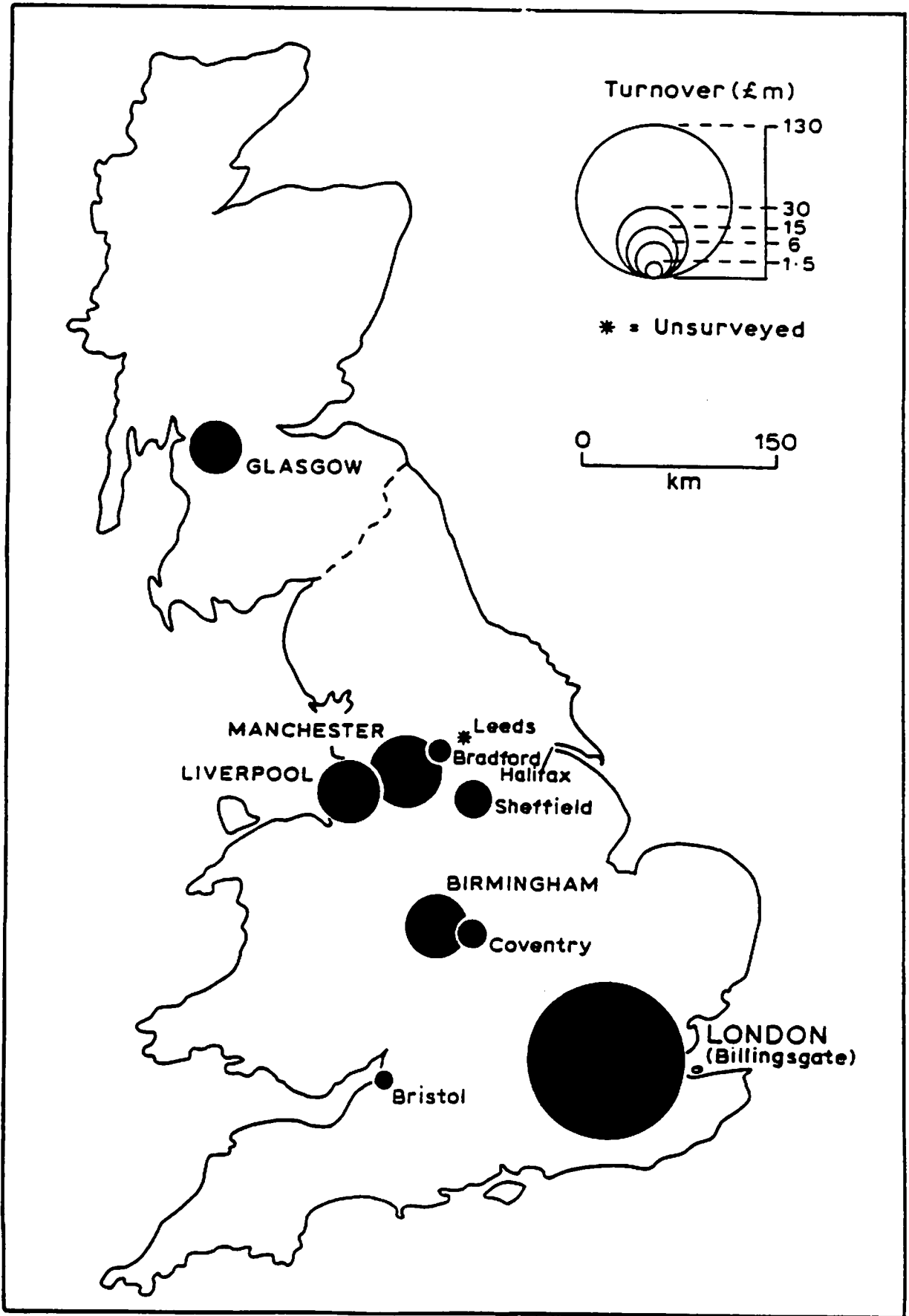


Fig. 3. Estimated total turnover

suffered a reduction in their turnover. Further discussion revealed, however, that in nearly all cases of increased turnover by value this improved performance had been due to increases in the prices of the products traded rather than to an increase in the volume of trade.

	Direction of Trend (%)			Total
	Increase	Stability	Decline	
Small firms	28	38	34	100
Medium firms	63	33	4	100
Large firms	80	20	0	100
Total	49	33	18	100

The situation varied quite markedly between the markets with Manchester (89%), Billingsgate (65%) and Liverpool (60%) reporting the largest number of firms with increased turnover and Glasgow (25%) and the small markets (15%) recording the smallest numbers of firms with increased turnover. This suggests a possible correlation between size of turnover and the direction of trend and is confirmed by further analysis. Indeed all but one of the firms with declining turnovers were in the smallest category (£1.0m). There is evidence also of a continuing concentration of the markets' structures and an increasing share of the total turnover being handled by a progressively smaller number of firms.

B4. SIZE OF FIRM : EMPLOYMENT

TABLE 4

	No. of persons employed				N/A	Total	Employees	
	2	3-4	5-9	10 & Over			Total	Av.
Billingsgate	4	12	15	6	0	37	236	6.38
Birmingham	1	6	6	4	0	17	120	7.06
Manchester	3	3	5	4	0	15	135	9.00
Liverpool	1	5	5	1	0	12	89	7.42
Small Markets	0	4	9	0	0	13	84	6.46
Glasgow	3	6	3	2	2	15	68	5.23
Total	12	36	43	17	2	110	732	6.78
%	11	33	39	15	2	100		

COMMENT

The wholesale trade does not, as a rule, generate a large volume of employment. The majority of firms on the inland markets were small (average 6.78 persons employed) with 44% of firms providing jobs for fewer than 5 persons. In these smaller firms there is little or no specialisation of labour with each person likely to be sharing the tasks of selling the fish on the market floor, loading/unloading of vans and daily book-keeping; often the family will provide all the labour requirements needed by the firm. Functional separation of labour becomes more strongly evident in the larger firms especially where delivery services are provided and some processing of fish is undertaken. It was estimated that total employment within the wholesale firms at the six 'markets' surveyed would amount to between 950 and 1000 persons of whom 10% would be employed on a part-time basis. Female employment opportunities were particularly scarce. Recruitment of suitable labour was said to be a problem on some markets, the unsocial hours, transport difficulties (especially where the market had moved from a town centre location), and the lack of an identifiable career structure may all be in part responsible.

Direct comparisons of the size and structure of the labour force at the different markets is complicated by variations in the employment system. At Billingsgate, for example, portering and delivery services are deemed to be provided by organisations separate from the merchanting firms.

As a result the employment size of the Billingsgate firms is smaller than on most other markets and the turnover per person employed very much higher. The figures for employment and for turnover/person employed at the Manchester and Liverpool markets were also considerably inflated by the two very large firms.

TABLE 5

	Employment			Employ/Firm		£Turnover/ Adj. Employee
	Total	Pt-Time	Adjusted	Total	Adj.	
Billingsgate	236	16	229.6	6.38	6.21	312,700
Birmingham	120	15	114.0	7.06	6.71	191,100
Manchester	135	5	133.0	9.00	8.87	221,700
Liverpool	89	14	83.4	7.41	6.95	248,600
Small Markets	74	10	70.0	5.69	5.38	97,600
Glasgow	68	6	65.6	4.85	4.69	170,900
Total	722	66	695.6	6.56	6.32	236,000

B5. DESCRIPTION OF TRADE

TABLE 6

DESCRIPTION OF TRADE (Number of firms)

	Number of Firms Trading in					Added Value	Total
	Wh. Fish	Pelagics	Sh. Fish	Exotics	Non Fish		
Billingsgate	32	18	20	12	0	4	37
Birmingham	16	10	10	5	6	5	17
Manchester	14	10	9	3	8	2	15
Liverpool	12	11	10	4	8	3	12
Small Mkts	13	9	11	4	9	6	13
Glasgow	16	13	3	0	1	2	16
Total	103	71	63	28	32	22	110
Percentage	94	65	57	25	29	20	100

TABLE 7

DESCRIPTION OF TRADE (By share of turnover)

	Wh. Fish	Pelagics	Sh. Fish	Exotics	Non Fish	Added Value	Total
(a) Value (£m)							
Billingsgate	62.4	10.4	40.3	14.3	-	2.6	130.0
Birmingham	12.0	1.0	3.5	3.5	1.0	1.0	22.0
Manchester	17.5	1.5	6.0	(-)	4.0	1.0	30.0
Liverpool	7.0	2.0	3.0	2.5	4.5	2.0	21.0
Glasgow	12.0	1.75	0.25	-	0.25	0.75	15.0
Small Markets	7.5	0.5	1.0	(-)	4.0	1.0	14.0
All Markets	118.4	17.15	54.05	20.3	13.75	8.35	232.0
(b) (%)							
Billingsgate	48	8	31	11	-	2	100
Birmingham	54.5	4.5	16	16	4.5	4.5	100
Manchester	58	5	20	1	13	3	100
Liverpool	33	10	14	12	21	10	100
Glasgow	80	12	1.5	-	1.5	5	100
Small Markets	54	3	7	-	29	7	100
All Markets	51	7	23	9	6	4	100

COMMENT (See also Figure 4)

Firms were asked to indicate in which areas of trade they were involved and to apportion their turnover between these areas. Not surprisingly whitefish sales (in fresh, frozen and smoked forms) dominated the pattern of trading at all the markets with 94% of all firms involved. Crude estimates suggest that roughly half the total turnover of trade in the inland markets as a whole involved whitefish, varying from 80% at Glasgow to only 33% at Liverpool. Whitefish sales were commonly supported by trade in pelagics (65% of firms) and/or shellfish (57%) but the shares of total turnover attributed to these two areas was strikingly different. Shellfish provided a strong, expanding sector, especially important in the case of Billingsgate, and accounts for 23% of gross turnover throughout the system as a whole. By contrast seasonality of supplies and low unit value reduced the share of the pelagic sector to only 7%. Trade in exotics had diffused unevenly through the system and features as an important element of trade only at Billingsgate, Birmingham and Liverpool. Overall Billingsgate was, as expected, the most well balanced market in terms of availability of the widest range of fish and fish products. Conversely Glasgow was by far the most narrowly based market with a very heavy dependence upon whitefish.

Throughout the system as a whole non-fish sales accounted for only 6% of total turnover though the proportion varied from nil at Billingsgate to 29% in the small markets. Generally speaking the smaller and weaker the market the greater the degree of diversification into non-fish trade.

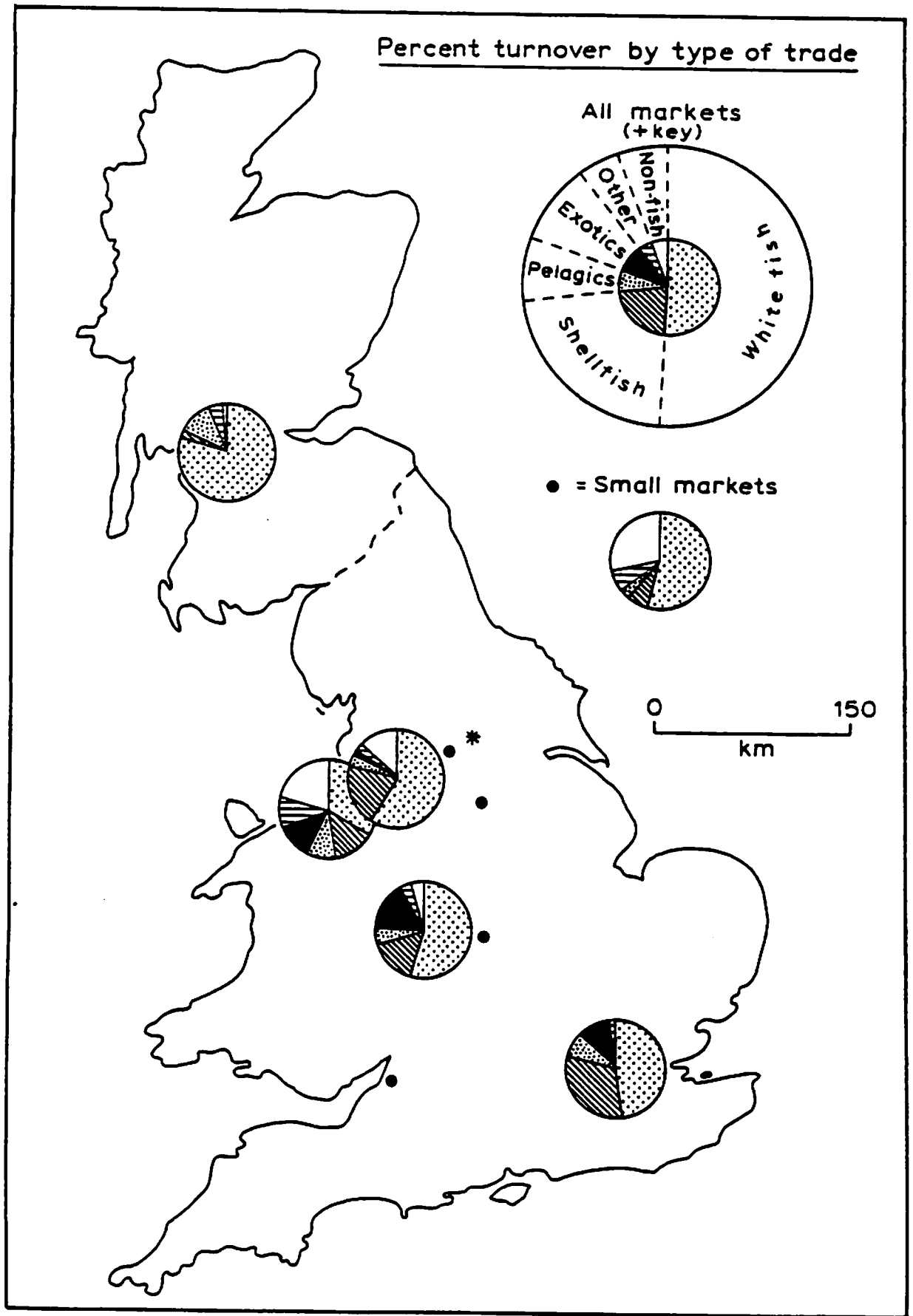


Fig. 4. Percentage turnover by type of trade

TABLE 8
CLASSIFICATION OF FIRMS BY DEGREE OF SPECIALISATION

	Specialists In				Non Specialised	Total
	Non Fish	Wh. Fish	Sh. Fish	Exotics		
Billingsgate	0	17	8	2	10	37
Birmingham	0	9	1	0	7	17
Manchester	0	8	1	0	6	15
Liverpool	0	4	0	0	8	12
Small Markets	2	5	0	0	6	13
Glasgow	0	15	0	0	1	16
Total	2	58	10	2	38	110
Percentage	2	58 53	9	2	34	100

COMMENT

On the basis of the information relating to the percentage of total turnover attributable to particular sectors of trade, firms were classified as either 'specialist' or 'non-specialised'. A specialist firm was one in which 75% or more of turnover originated from only one sector of trade. Roughly two thirds of all firms surveyed fell within the specialist category and more than half were classified as 'specialist whitefish' firms. There was a limited degree of specialisation in the shellfish, exotics and non-fish sectors. The remaining one third of firms operated on a more broadly based, non-specialised pattern. Specialisation was most marked at Billingsgate, where nearly three quarters of all firms were specialised, and at Glasgow where all but one firm conformed to the definition of specialist whitefish; it was least pronounced at Liverpool.

B6. RANGE OF SPECIES OFFERED

TABLE 9
TOP FIVE SPECIES

	Rank Order				
	1	2	3	4	5
Billingsgate	Cod	Plaice	Haddock	Soles	Prawns) Skate)
Birmingham	Cod	Plaice	Haddock	Salmon	Soles) Prawns)
Manchester	Cod	Plaice	Whiting	Hake	Haddock
Liverpool	Cod	Plaice	Haddock	Whiting	Mackerel
Small Markets	Cod	Plaice	Haddock	Mackerel	Coley
Glasgow	Whiting	Haddock	L. Soles	Grey Soles	Cod
All Markets	Cod	Plaice	Haddock	Whiting	L. Soles

COMMENT

It was not possible to produce a complete species list for each market nor to arrive at estimates of tonnages for each of the principal species handled on the inland markets. Instead an indication of the six main selling lines in rank order was obtained for each firm and this has been used to evaluate the relative importance of individual species (although, in a large number of instances, ranking ceased after three or four species).

From the evidence of 'top six lines' it seems likely that there is a direct relationship between the size of the market and the range of species offered for sale. As expected the trade is dominated by the three major demersal species - cod, plaice and haddock; only the Glasgow and Manchester markets broke this sequence. Below third rank there was no consistent pattern though significantly the London and Birmingham markets showed a preference for the higher priced whitefish species and for shellfish, while the trade of the northern markets, together with the small markets, maintained a preference for low priced species of either whitefish or pelagics.

B7. SOURCES OF SUPPLY

TABLE 10
SOURCES OF SUPPLY FOR WHITEFISH

		MENTIONS		AVERAGE
		TOTAL	OF WHICH 1ST	SCORE
<u>Cod:</u>	N.E. Scotland	55	42	1.24
	Humberside	38	16	1.60
	Lowestoft	5	0	2.60
	Other districts	20	6	1.90
<u>Haddock:</u>	N.E. Scotland	46	42	1.09
	Humberside	14	8	1.43
	Lowestoft	0	0	-
	Other districts	4	1	1.75
<u>Plaice:</u>	N.E. Scotland	31	21	1.35
	Humberside	25	18	1.32
	Lowestoft	20	11	1.40
	Other districts	9	5	1.44
<u>Other</u>				
<u>Whitefish:</u>	N.E. Scotland	32	27	1.19
	Humberside	9	6	1.44
	Lowestoft	7	3	1.57
	Other districts	26	18	1.35
<u>All</u>				
<u>Whitefish:</u>	N.E. Scotland	164	132	1.21
	Humberside	86	48	1.50
	Lowestoft	32	14	1.69
	Other districts	58	30	1.55

Merchants were asked to indicate the principal sources of supply for the main items of trade handled by their firms. For fresh whitefish, which make up the bulk of the inland market trade, the N.E. Scottish ports (Aberdeen, Peterhead, Fraserburgh) are clearly the predominant source. Second were the Humber ports (Hull and Grimsby) where reduced white fish landings have been supplemented by containerised fresh whitefish supplies, principally from Iceland. The

only other port to feature regularly in the merchants' buying patterns was Lowestoft, most notably for plaice.

This general pattern held true for practically all markets. Not surprisingly Scottish dominance was greatest at Glasgow and weakest in the case of the small markets where proximity to the Humberside markets or sheer distance from N.E. Scotland gave the advantage to the Humber ports. In general, it is possible to discern a distance decay effect with the strength of the N.E. Scottish influence declining the further south the market. Of particular interest is the relative importance of supplies from 'other districts'. Although they may be seen to occupy a position somewhere between Humberside and Lowestoft, their orientation varies from port to port. Thus in Glasgow the 'other districts' mainly comprise the Scottish west coast ports with little variation in species; in the northern English markets the Yorkshire coast ports of Scarborough and Whitby attain local importance; and at Birmingham and to a greater extent, Billingsgate, it is the south coast ports from Kent through to Cornwall that feature significantly in the supply of higher value whitefish (soles, brill, bream etc).

Apart from seasonally available shellfish (crab, lobster, mussels etc) and pelagic fish (herring and mackerel) bought around the UK coast, farmed salmon and trout, and the traditionally processed smoked fish from Humberside and Scotland most other supplies reached their respective inland markets either as direct imports or, more commonly, through import agents. Except at Billingsgate the number of firms dealing directly with imported fish was very small - usually no more than one firm on each market.

B8. SEASONALITY OF SUPPLIES

All markets faced problems of shortages of supplies of fresh whitefish especially in the weeks surrounding Christmas and the New Year. Strategies varied little between the markets. Most merchants claimed to widen the range of search for available supplies of scarce and expensive fish in order to satisfy the customers' preference for fresh fish. For many - particularly those with a significant volume of sales to the frying trade - the expedient was to freeze down surplus fish in the late summer and autumn for release over the Christmas period. Whatever the solution, it seems likely that the volume of sales of fish through the inland markets will dip sharply in the two to three week period between 20th December and 5th January. No evidence was offered of any other regular periods of short supply.

B9. CUSTOMER PROFILE

TABLE 11
TYPE OF CUSTOMER (No. of firms)

	S/Mkts	Mongers	Stalls	Mobiles	Friers	Hotels etc	Indust. Caterers	Insti- tutions	Other	Total
Billingsgate	12	37	24	16	15	21	7	1	11	37
Birmingham	4	17	16	15	13	11	3	1	3	17
Manchester	1	15	11	8	8	10	5	3	3	15
Liverpool	0	11	11	10	10	7	2	1	2	12
Small Mkts	1	12	7	8	9	9	6	5	2	13
Glasgow	0	15	5	12	11	3	1	0	2	16
Total	18	107	74	69	66	62	24	11	23	110
Percentage	16	97	67	69	60	56	22	10	21	100

TABLE 12
TYPE OF CUSTOMER BY SHARE OF TURNOVER

	Super- Markets	Fish- Mongers	Market Stalls	Mobile Traders	Fish Friers	Hotels/ Rests.	Instit. Caterers	Others	Total
(a) (£m)									
Billingsgate	4	38	17	5	15	21	12	18	130
Birmingham	0.5	8	4	2	3	3	0.5	1	22
Manchester	0.5	10	4	1.5	5	5	1	3	30
Liverpool	-	4	2	1	6	4	1	3	21
Glasgow	-	7	0.5	2.5	3.5	0.5	0.5	0.5	15
Small Markets	(-)	2.5	1.5	1	5.5	2	1.5	(-)	14
All Markets	5	69.5	29	13	38	35.5	16.5	25.5	232
(b) (%)									
Billingsgate	3	29	13	4	12	16	9	14	100
Birmingham	2	36	18	9	14	14	2	5	100
Manchester	2	33	13	5	17	17	3	10	100
Liverpool	-	19	9.5	5	28.5	19	5	14	100
Glasgow	-	47	3	17	23	3	3	3	100
Small Markets	(-)	18	11	7	39	14	11	(-)	100
All Markets	2	30	13	6	16	15	7	11	100

COMMENT (See also Figure 5)

The traditional links of the inland markets with the retail trade remain strong, with 97% of firms including mongers among their customers; two thirds also sold fish to market stalls and mobile shops. Surprisingly, therefore, in view of this and the strength of specialisation in the retail trade (see Table 13), retail outlets accounted for only a shade over half the total turnover. Within the retail sector, valued at around £115m, fishmongers (including grocery outlets) accounted for 60%, market stalls 25%, mobile shops 10% and supermarkets less than 5%. The importance of the retail sector varied between the markets: it commanded the highest share at Glasgow (67%) and Birmingham (63%) and the lowest at Liverpool (34%) and on the smaller markets (36%).

Of the alternative types of customer the two most important - the friers, accounting for £38m or 16%, and the hotels and restaurants (£36m or 15%) revealed contrasting fortunes. The former represented a declining area of trade as the shops diversified into other forms of 'take away' foods: it remained of particular importance on the smaller markets (where it represented 40% of turnover) and in Glasgow (23%). The private catering industry, on the other hand, was a relatively booming area of trade especially at Billingsgate, though paradoxically it achieved its strongest share of turnover in the north western markets of Liverpool (19%) and Manchester (17%) largely on account of the influence of two very large firms. At Billingsgate, Manchester and Liverpool - again under the influence of these same large firms - there was a significant trade with other wholesalers off the market.

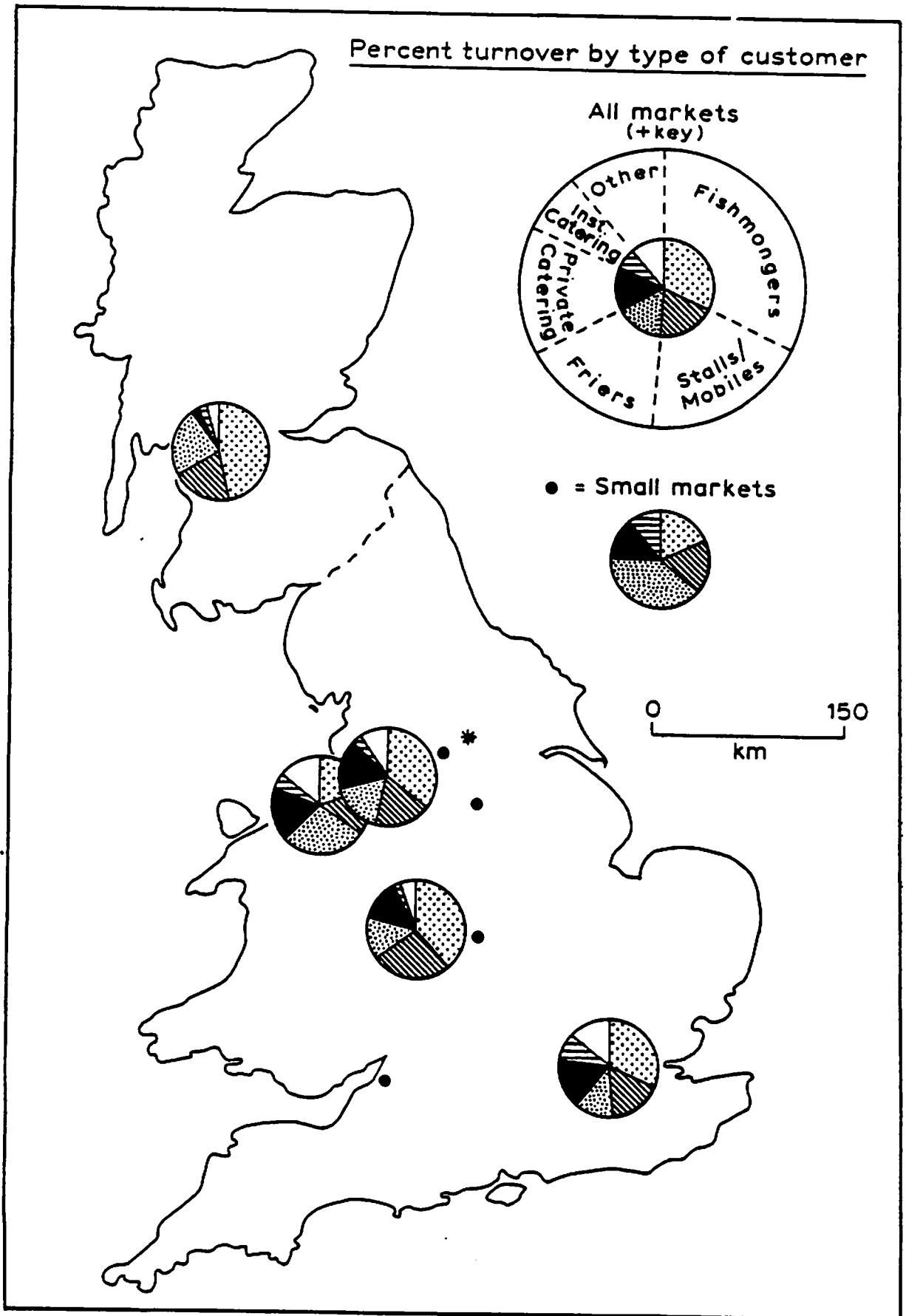


Fig. 5. Percentage turnover by type of customer

TABLE 13

CLASSIFICATION OF FIRMS BY LEVEL OF SPECIALISATION IN CUSTOM

	RETAIL	SPECIALIST				WHOLESALE	NON-SPECIALIST	TOTAL
		FRIERS	HOTEL	IND./INST.				
Billingsgate	11	2	1	1	1	21	37	
Birmingham	6	2	0	0	0	9	17	
Manchester	6	1	0	1	1	6	15	
Liverpool	4	2	0	0	0	6	12	
Small Mkts	1	3	0	1	0	8	13	
Glasgow	10	0	0	0	0	6	16	
Total	38	10	1	3	2	56	110	
Percentage	35	9	1	3	2	51	100	

COMMENT

The relative importance of the different sectors of the inland markets' trade was again reflected in the pattern of specialisation. Overall roughly equal numbers of firms fell within the specialist and non-specialised categories. As expected the retail sector (mongers, stalls and mobiles) accounted for the largest proportion of specialist firms (70%) followed by friers (19%). Perhaps unexpectedly, only one firm had so far concentrated 75% or more of its turnover in the expanding hotel and restaurant trade. In general, it appeared to be the smaller sized firms which were most likely to specialise. Apart from Glasgow where 62% of firms were specialised (all in the retail trade) and Manchester (60%) there was little to choose between markets in terms of their levels of specialisation.

TABLE 14
FIRMS BY NUMBER OF CUSTOMERS

	NUMBER OF CUSTOMERS					NO ANSWER	TOTAL
	< 50	50-99	100-199	200-299	300		
Billingsgate	2	7	5	7	12	4	37
Birmingham	1	5	3	2	4	0	17
Manchester	1	1	4	3	4	2	15
Liverpool	1	2	4	2	3	0	12
Small Mkts	3	3	5	1	0	1	13
Glasgow	0	6	2	3	1	4	16
Total	8	24	25	18	24	11	110
Percentage	7	22	23	16	22	10	100

TABLE 15
PROPORTION OF ACCOUNT CUSTOMERS

	% of TOTAL CUSTOMERS AS ACCOUNT CUSTOMERS					N/A	TOTAL
	< 60	60-69	70-79	80-89	90 + Over		
Billingsgate	6	6	6	6	12	1	37
Birmingham	3	0	3	2	7	2	17
Manchester	6	3	3	1	2	0	15
Liverpool	6	2	2	1	1	0	12
Small Mkts	1	3	1	1	5	2	13
Glasgow	0	0	2	4	9	1	16
Total	22	14	17	15	36	6	110
Percentage	20	13	15	14	33	5	100

COMMENT

It is clearly not possible to estimate the total number of customers using a particular inland market because of the unidentifiable proportion who will purchase fish from two or more merchants on the same market. It is, however, possible to draw attention to variation in the number of customers etc. not only between the different markets but, more significantly according to the size of firm. The average number of customers per firm for all markets was 200: at Manchester, Billingsgate and Liverpool the figures were substantially above the average;

and at Birmingham, Glasgow and the small markets they were substantially below. As one might expect the size of a firm's clientele tends to correlate with the size of firm. Thus the small firms with less than £1.0m turnover averaged only 130 customers compared with 350 for the large firms with turnover in excess of £2.0 million. But more importantly the analysis suggests that the small firms generally attracted only those customers who purchased relatively small volumes and values. Indeed much of the trade of the small firms was with the retail sector (mongers, market stalls and mobile shops) which characteristically purchased small volumes on a day by day basis from a number of different merchants. By contrast the larger firms dealt mainly with larger customers either in the retail sector or in the frying, hotel and restaurant and industrial and institutional catering sectors. These types of customers tend to buy larger volumes and to concentrate their purchasing on a single firm with the result that the customers of the large firms averaged £250 of purchases per week.

These inter-firm differences tend to cancel each other out within the market so that the average turnover/customer is remarkably similar for all markets except Glasgow, where the low turnover/customer reflects its strong emphasis upon the retail sector, and the small markets. The latter provide a surprising anomaly. As expected their firms attract a comparatively small number of customers but mainly from outside the retail sector. As a result the turnover/customer on the small market is well above the average for all markets.

	AVERAGE	
	NO. OF CUSTOMERS	£ TURNOVER/CUSTOMER
Billingsgate	230	7850
Birmingham	175	7325
Manchester	260	7300
Liverpool	230	7550
Small Markets	105	8575
Glasgow	130	6550
Small firms	130	4250
Medium firms	200	6250
Large firms	350	12000
All firms	200	7575

B10. CUSTOMER CATCHMENT

TABLE 16
DELIVERIES

	% FIRMS WITH DELIVERIES	NUMBER OF VEHICLES						N/A	TOTAL
		0	1	2	3	4	5 + OVER		
Billingsgate	0	37	0	0	0	0	0	0	37
Birmingham	71	5	6	4	1	0	0	1	17
Manchester	60	6	1	2	3	2	1	0	15
Liverpool	83	2	4	2	2	0	2	0	12
Small Mkts	100	0	2	5	4	1	1	0	13
Glasgow	25	9	2	1	1	0	1	2	16
Total	46	59	15	14	11	3	5	3	110
Percentage	-	54	13	13	10	3	4	3	100

COMMENT

Deliveries have become an integral part of the service provided by the inland markets to their customers. Apart from Billingsgate, where distribution from the market is largely undertaken by separate carrier services and Glasgow, a substantial majority of firms at all markets now provide a delivery service, ranging from 60% of firms at Manchester to 100% in the case of the small markets. Despite this the bulk of the trade is handled on a customer-collect basis. Again excluding Billingsgate, roughly 36% of trade by turnover value is delivered by the merchants' own transport - ranging from 16% at Birmingham and Glasgow to 77% at the small markets. At Billingsgate a contract delivery service replaces the merchants' own deliveries and handles some 44% of the distribution to customers; hired transport services are also used at some of the other markets, mainly in the case of large firms which are supplying the wholesale trade on a nationwide basis.

Judging from the experiences of the small markets the ability to offer a delivery service is an important factor in their survival. And

it is of particular significance to the friers' sector, whereas most retail customers found it preferable to collect their fish from the inland market in order to guarantee having it available for display in time for shop opening. At Glasgow, where only a minority of merchants offer a delivery service, concern was voiced at the increasing insistence on the part of local fish friers for the delivery of fish to their premises.

There was however no correlation between the strength of the delivery service (measured either in terms of the number of merchants offering delivery or the proportion of trade handled) and the size of the catchment. This was true for both the market and the individual merchants. In most cases the total catchment area for a market's trade exceeded the area within which deliveries were made. Many firms provided deliveries only within the immediate area of the market, leaving customers in the outlying areas to collect their own supplies of fish from the market.

According to the merchants' own statements, the inland markets cover a large area of the U.K. In Figure 6 the limits to the markets' trade areas are defined by the 'furthest customer'. It suggests that only Northern Scotland, North East England and the extreme south west of England and Wales lie beyond the reach of the inland markets. But the survey results indicate that almost exactly half the total sales value was accounted for by trade originating within a 10 mile radius of the market premises - not all that surprising when one recalls that all the inland markets were located within cities of approx. 275,000 population and upwards. The small markets revealed the narrowest catchments with almost 80% of their trade occurring within 10 miles of the market and less than 5% from beyond a 25 mile radius. All other markets showed significant proportions of their total turnover arising from sales to customers situated 25 miles or more from the market; at no market (other than the small markets) was the proportion less than 15%. Markets with the highest proportion of trade coming from these more distant areas were Manchester (25%) and Liverpool (33%). In both cases the significance of the distance trade was greatly inflated

by the presence of one exceptionally large firm with an extensive catchment and a significant volume of trade with secondary wholesalers; if these firms are discounted the share of the markets' turnover attributable to distance trade falls back to around the 15% level.

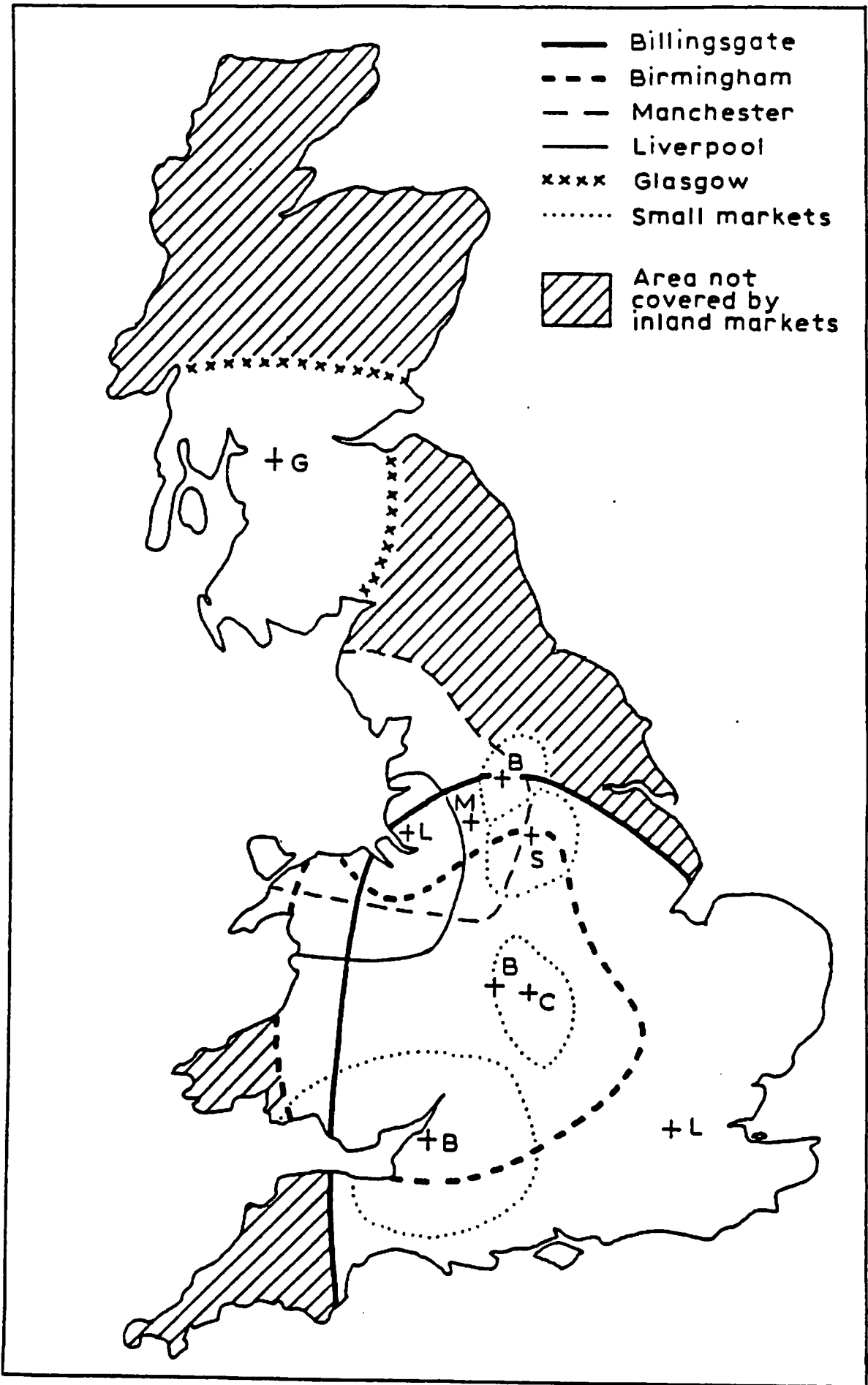


Fig. 6. Catchment areas of the markets

B11. WEEKLY TRADING PATTERN

TABLE 17
RELATIVE IMPORTANCE OF DAYS' TRADING

	Mon	Tues	Wed	Thurs	Fri	Sat
Merchants attending	51	108	108	108	108	96
Average Score*	0.91	5.21	2.87	5.20	4.37	2.33
Rank order	6	1	4	2	3	5

*Average score based on: heaviest day's trading = 6.....
lightest day's trading = 1, market closed or merchant not attending = 0.

COMMENT

Except for the Billingsgate and Glasgow markets which are closed on Mondays, all markets were open for trading on six days a week. The pattern of trade throughout the week follows a fairly consistent pattern with Tuesdays and Thursdays the heaviest days and Mondays, Wednesdays and Saturdays the lightest. Saturdays are used principally for settling accounts and for cashing up the week's takings, while quiet trading on a Monday can be used for planning the week's buying and selling. It seems unlikely that there would be a serious loss of trade if all markets followed the example of Billingsgate and Glasgow by closing on Mondays and reducing to a five day trading week. Although there is little difference between the markets there was some variation within the market with those merchants handling substantial accounts with the frying trade tending to find Fridays displacing Thursdays as the second busiest day as firms prepare for their busy weekend trade.

B12. STORAGE AND PROCESSING

It is the aim of most inland merchants wherever possible to turn over their supplies of fresh fish within an 8 hour cycle - or, at worst, a 32 hour cycle. Thus fresh fish delivered to the market at say 4.00am should be sold and dispatched from the market by noon the same day. Where fresh fish remains unsold at the end of the day's trading it may be held over until the following morning's market by being iced over and/or stored in a chill room (depending upon ambient temperature). Towards the end of the second day's trading, unsold fish will be offered for sale at reduced prices in the hope of clearing stock. Very little fish fails to find an outlet; occasionally fish may be frozen down or salted down, sold for fishcake manufacture or for pet food or returned to the coast for reduction to fish meal. However, in order to maintain continuity of supplies to his customers in a fluctuating market, the merchant may need from time to time to purchase supplies of fresh fish a few days in advance of anticipated sales. And for merchants handling shellfish, some farmed fish or exotics, for which deliveries to the market are less frequent, it may be necessary to hold stock for very much longer periods, normally in freezer stores.

It follows that nearly all inland merchants have need of immediately available chillroom storage, access to ice-making machinery and, less frequently, access to freezer storage. Nearly all merchants have adequate chillroom storage, that is sufficient to hold upto one or possibly two days stock, though probably less than a third have their own ice-making plant. Freezer storage is normally available on the market or in public and private cold stores off the market.

Very little processing of fish is done on the market: only a small minority will skin, gut and fillet roundfish or 'portion' fish for their customers. At Billingsgate there are some facilities for boiling shellfish attached to the market but otherwise most preparation of fish has to be done off the market usually by subsidiaries of the merchants' firms.

C. ATTITUDES AND OPINIONS

C13. INTRODUCTION

In the second part of the interview, merchants were invited to express their opinions on a wide range of matters relating to the market and its trade. In the first place, they were asked to allocate scores to their own suppliers and customers on the basis of 'very good' (5), 'good' (4), 'adequate'(3), 'poor' (2), 'very poor' (1) and then to comment more generally on the issues raised. Finally merchants were asked to comment on the inland market's function, its problems, and its prospects over the next 5 years. As a result some fairly outspoken views were expressed and these have been assembled in the individual market profiles. The purpose of this summary report is to attempt to identify general opinions prevailing throughout the inland markets as a whole. In the following pages, therefore, the tables present the results for all markets together, and also indicate, in summary score form, the overall assessment given at each market separately. In general the scores appear to indicate a fairly narrow variation in opinion between the different markets.

C14. COASTAL MERCHANTS

TABLE 18

a)	Very Good	Good	Adeq.	Poor	Very Poor	N/A	Total	Average Score
Quality	31	30	23	7	1	8	100	3.90
Reliability	17	35	23	15	1	9	100	3.59
Presentation	18	42	17	6	3	14	100	3.77

b)	B'gate	B'ham	M/c	L'pool	Small Markets	Glasgow	All markets
Average Score							
Q+R+P	3.70	4.09	3.59	3.65	3.91	3.63	3.75

COMMENT

Most merchants were well pleased with the service provided by their own 'senders'. It is seen as the merchant's own responsibility to exercise control over the quality of fish he is willing to accept from the coast. The persistence of strong ties of loyalty between the individual inland merchant and a limited number of senders, whose trade does not overlap other merchants on the same market, has helped to assure reliability of supplies. But some merchants throughout the system reported a decline in both continuity and quality of supplies and questioned whether the traditional ties between the inland and coastal markets were beginning to weaken with the result that the inland market was being used as a clearing house for fish that could not be sold elsewhere. In particular the diversion of good quality fresh fish to overseas markets at times of relative scarcity was noted. There was quite widespread criticism of continuing problems of handling and packaging of fish despite the adoption of polystyrene boxes.

Generally the highest praise was reserved for the N.E. Scottish fish and also for supplies from a number of the smaller ports favoured by particular inland markets (e.g. the Yorkshire coast and the South West) and the strongest criticism for Humberside fish and particularly the imported supplies of fresh fish. Surprisingly the most vigorous criticisms of Scottish fish were voiced on the Glasgow market; maybe the English markets with their customary dependence on Humberside (and, therefore, on distant water catches) have simply grown accustomed to an indifferent quality of fresh fish.

Comment was also made on the fact that the quality of fish tends to vary through the week with poor quality fish available on the markets in the early part of the week - the result of landing patterns at the N.E. Scottish ports.

C15. TRANSPORT FROM THE COAST

TABLE 19

	Very Good	Good	Adq.	Poor	Very Poor	N.A.	Average Score
Care in Transit	16	38	20	24	6	6	3.50
Reliability	56	35	4	1	0	4	4.63

	B'gate	B'ham	M/c	L'pool	Small Markets	Glasgow	All Markets
Av. Score C+R	3.90	4.24	4.00	3.96	3.92	4.13	4.01

COMMENT

There was some polarisation of attitudes towards the delivery of fish from the coast varying between almost unqualified praise for reliability of deliveries to criticism of poor handling of fish in transit. There were few reported failures in getting the fish onto the inland markets in good time for the opening of trading, through merchants at Bristol were critical of late deliveries from both N.E. Scotland (the longest overland haul) and from the South West (the shortest). Opinions on care in transit varied but there was generally concern at the careless handling of boxes on loading, unloading and transshipment, leading to breakages and damage to the fish, and also at the fact that many firms, including those from N.E. Scotland, still persisted in transporting fish on long overland hauls in non-refrigerated vehicles.

C16. FISHMONGERS

TABLE 20

	Very Good	Good	Adq.	Poor	Very Poor	N.A.	Average Score
Presentation	12	34	18	13	1	22	3.56
Range	8	33	22	11	2	24	3.46
Quality	13	31	15	5	1	35	3.76

	B'gate	B'ham	M/c	L'pool	Small Markets	Glasgow	All Markets
Av. Score P+R+Q	3.51	4.24	3.21	3.58	3.21	3.59	3.58

COMMENT

The retail industry continues to make up by far the most important area of custom for the inland markets, with fishmongers commanding pride of place. In commenting on their fishmonger customers, merchants were quick to distinguish between the specialist high street monger, on the one hand, and the 'general grocery' trade and mobile trader on the other. The traditional monger is one who knows the business as far as quality and presentation is concerned but he tends to be conservative in terms of the range of species he is willing to carry. Concern was expressed at the growing scarcity of good retail outlets especially in town centre locations. Much stronger criticisms - amounting in some instances to unveiled contempt - were directed at the general grocery trade with its alleged lack of knowledge or concern for quality and presentation, and towards the mobile trader who stands accused of poor handling and unsatisfactory storage of fish with the result that a very indifferent quality of fish was being offered for sale.

C17. SUPERMARKETS

TABLE 21

	Very Good	Good	Adq.	Poor	Very Poor	N.A.	Average Score
Presentation	15	21	10	9	9	36	3.38
Range	10	24	22	5	1	38	3.65
Quality	7	14	14	11	3	51	3.25

	B'gate	B'ham	M/c	L'pool	Small Markets	Glasgow	All Markets
Av. Score P+R+Q	3.29	3.46	3.25	3.67	4.00	3.29	3.42

COMMENT

The inland markets have, by and large, failed to make any major impression on the sales of fresh fish by the supermarket outlets with their marked preference for central buying policies. Only at Billingsgate were a significant number of merchants involved in selling to the major supermarket groups. Inland merchants thus look upon this sector of the retail industry with mixed feelings. They show a grudging admiration for the supermarket system of one-stop shopping and offer reluctant praise for their belated promotion of fish to the buying public and for their display facilities. But they were concerned that the supermarkets were tending to promote fish as a relatively expensive food item and that their success was seriously undermining the viability of the more traditional high street outlets and especially of the non-specialised grocer/green-grocer carrying relatively small quantities of fish. And they revealed barely disguised contempt for the supermarkets' uninformed attitudes towards quality of fresh fish and for the lack of understanding of the trade shown by their sales staff.

Nonetheless there was a widespread recognition that the supermarkets represented a major threat to the future of the inland market trade.

C18. FISH FRIERS

TABLE 22

	Very Good	Good	Adq.	Poor	Very Poor	N.A.	Average Score
Presentation	12	19	15	6	3	45	3.56
Range	6	20	12	15	4	43	3.17
Quality	6	21	19	6	1	47	3.50

	B'gate	B'ham	M/c	L'pool	Small Markets	Glasgow	All Markets
Av. Score P+R+Q	3.42	3.74	3.27	3.05	3.33	3.31	3.40

COMMENT

The fish friers represented the second most important source of sales for the inland markets but, like the retail sector, it was a declining area of trade as sales of fish account for a diminishing share of the fast food trade and as friers are increasingly turning to direct deliveries from the coast as their main source of supplies. In fact the friers were given the poorest overall assessment by the inland merchants but this concealed a strong polarisation of individual opinion. For some merchants the friers have clearly become too demanding with their insistence on careful grading of fish for accurate proportioning and on the delivery of their orders - and there was considerable criticism of their slowness in settling accounts. A distinction was drawn between the more 'reliable' British friers and the ethnic minorities, who were seen to be rapidly taking over the fish and chip trade in certain areas and who were accused of having less knowledge of and less interest in fish than in other items of fast food. In general such criticisms were muted in the case of those merchants with considerable interest in the frying trade.

C19. HOTELS AND RESTAURANTS

TABLE 23

	Very Good	Good	Adq.	Poor	Very Poor	N.A.	Average Score
Presentation Range	12	26	16	7	2	37	3.61
	18	20	15	3	2	42	3.86

	B'gate	B'ham	M/c	L'pool	Small Markets	Glasgow	All Markets
Av. Score P+R	4.10	3.92	3.65	4.47	2.20	3.47	3.74

COMMENT

In marked contrast to the retail and frying sectors, hotels and restaurants were seen to represent an expanding area of trade - rather more so in the prosperous and cosmopolitan London region than elsewhere in Britain. Not only were they seen to be increasing their sales of fish but also to be diversifying the range of species offered, particularly among the more highly priced whitefish, shellfish and exotics.

The results of the merchants' attitudes towards this burgeoning area of trade were diminished by the surprisingly large number of instances where no opinion was offered. Nonetheless the hotel and restaurant sector emerges with the highest overall score among the different areas of custom - only among the small markets were they accorded a low score.

Among the Billingsgate merchants the catering industry was generally regarded as exhibiting a highly developed sense of quality with many of the major hotels and restaurants employing experienced buyers who visited the market regularly to select the best fish. There was however a sense that good fish eating was an experience likely to remain contained within the better hotels and restaurants rather than diffused into the domestic sector. Outside Billingsgate, further comment on the catering industry was both scarce and terse perhaps underlining the difference between the situation in London and the provinces.

C20. QUALITY DEMANDS FROM CUSTOMERS

TABLE 21

	Rank Order					N/A	Average Score
	1	2	3	4	5		
Mongers	54	20	5	0	0	31	1.37
Hotels/Rests.	22	11	11	5	2	59	2.10
Friers	8	21	13	6	2	60	2.46
Mobiles	2	16	18	7	5	62	2.94
Ind/Inst Caterers	0	2	4	6	12	86	4.17

COMMENT

Merchants were asked to rank various types of customer according to the demands they exerted upon the quality of fish supplies. In most cases merchants were content to rank only one or two customer types and to leave the remaining categories 'unsorted'. Nonetheless the results correspond quite well with the assessments of the individual sectors of the market discussed in detail above. The specialist fishmongers and the hotels and restaurants emerged in first and second rank respectively, followed by the friers and the mobile traders with the institutional and industrial caterers in a very poor last position. There was little variation between the individual markets - only at Glasgow was there any noticeable difference in ranking with the friers displacing the hotel and restaurant trade into third place.

C21. PHYSICAL CONDITION OF THE MARKET PREMISES

TABLE 25

	Highly Satisfied	Satisfied	Dis-Satisfied	Highly Dissatisfied	N/A	Total
All markets (%)	4	46	24	21	5	100

	B'gate	B'ham	M'c	L'pool	Small Markets	Glasgow	All Markets
Av. score*	2.66	2.65	2.47	1.58	1.78	2.13	2.35

*calculated on basis of highly satisfied = 4.... highly dissatisfied = 1.

COMMENT

Except at Bristol all the markets had been rehoused in new premises within the previous 20 years or so - in most cases on sites in the outer urban area close to access to the motorway network. Only the Birmingham market had retained its city centre location. Slightly more merchants were satisfied (50%) with the physical conditions of the market premises than were dissatisfied (45%). Yet what was significant about the answers to this question was the strength of disapproval recorded at certain markets. This is reflected in the very low average scores in the case of Liverpool and the small markets.

In general most criticism was directed towards the poor basic design of the building, the lack of space and inadequate access and, in particular, the poor standards of maintenance and repair carried out by the local authority landlords resulting in a poor working environment and potentially unhygienic conditions.

At Bristol the situation is compounded by the fact that the market still occupies its Victorian town centre premises unsuited to the conditions of transport and trade in the late 20th Century. But, without doubt, the worst situation occurred at Liverpool where the market had remained temporarily housed in a converted cattle yard adjacent to the city abattoir for over 20 years and in conditions which were wholly inadequate for trading in fresh foodstuffs.

Plans for the relocation (and rebuilding) of market premises were under active consideration only in the case of the small Coventry market.

D. THE ROLE OF THE INLAND MARKETS: PROBLEMS AND THE NEED FOR ACTION

D22. INTRODUCTION

A series of open-ended questions were introduced into the later stages of the interview which referred to the role of the inland market, the identification of the principal problems, sources of future competition and the need for action over the short term. It thus provided an opportunity for a critical self-examination of the situation facing the inland markets. The responses revealed a high degree of consistency throughout the market systems.

D23. THE ROLE OF THE INLAND MARKET

A comprehensive definition of the role of the inland market can be built up from the range of answers provided by individual merchants:

"a central clearing house and intermediate distribution point for wetfish and other fish products, situated between the point of first hand sale at the coast and the final point of sale to the customer, which is able to offer choice, variety, continuity and quality of raw material to the retail and catering trades at realistic, competitive prices".

It is particularly well adapted to the needs of the small customer who wishes to buy small quantities of a potentially wide variety of fish on a frequent and regular basis. The distinction between the inland market and the independent wholesaler lies essentially in the elements of choice and competition.

From time to time doubts were expressed as to whether the inland market remained fully competent to discharge this role. In some instances the element of competition had diminished as the size of the market had declined and as the fewer, remaining merchants - deliberately or otherwise - divided up the custom on a basis of specialisation. The fact that the market's function was being progressively marginalised by

successful external competition (direct deliveries, freezer depots and independent wholesaling companies) pointed to a devolving role. Yet there was little willingness on the part of the merchants to concede the need for changes within the inland market's system in order to re-establish the market's central position within the distribution system. There was a reluctant admission that firms were being forced to change their style of trading, to diversify the range of products offered for sale and to assume a stronger distributional function.

D24. PROBLEMS FACING THE INLAND MARKETS

Merchants were, in general, keenly aware of a number of problems external to the market which threatened the continuation of the inland market's function. These included:

- i) the reliability and quality of wetfish supplies together with the fluctuating but upward trending prices : uncertainty of supplies and unstable prices tended to induce consumer resistance and to cause a shift in custom towards the more stable frozen fish supplier;
- ii) direct consignments of wetfish from the coastal markets to the larger retail and catering customers within the market's catchment area and which therefore bypass the inland wholesale market;
- iii) competition from the supermarkets, whose direct buying policies also ignore the inland market; their success is seriously undermining the competitive position of the high street fishmongers and grocer/monger - major customers of the inland market;
- iv) changing attitudes to fish among the buying public, in which there has been a strong generational shift away from fresh fish and towards the convenience of frozen fish and ready-to-cook recipe dishes.

Rather surprisingly there was little direct reference to financial problems faced by the inland merchants but there were implicit references to 'cashflow' problems resulting from the slowness of certain customers in settling their accounts.

Merchants were generally less willing to look within the organisation of the inland markets or their own individual businesses to identify problems and impediments to expansion. Practically all inland markets suffer from a lack of effective internal organisation, strong direction and constructive cooperation among their members. The strong bonds of loyalty and mutual confidence upstream and downstream from the market are largely absent from across-market relationships. Where merchants did point to problems within the system (as was the case in Billingsgate) these usually referred to:

- i) restrictive practices, including limited hours of trading;
- ii) physical constraints caused by the design of the market building;
- iii) poor relationships between the market and the landlord, usually the local authority;
- iv) rising costs of operation, including overhead charges levied by the landlords and costs of distribution from the market.

D25. FUTURE COMPETITION

Merchants throughout the inland market system were clearly concerned by the likelihood of growing competition for scarce supplies and a diminishing number of customers. With the international nature of the market for fresh fish there was concern that the top quality fresh fish landed in the UK would be captured by foreign buyers from certain European countries who were willing and able to outbid the coastal merchants at the point of first sale. Other direct threats were identified as coming from the further growth of direct deliveries by the

coastal merchants and from independent wholesale firms and frozen food depots operating outside the framework of the inland markets. Indirectly the greatest threat was likely to come from the continuing growth of the supermarket trade at the expense of the inland markets' most important customer, the specialist fishmonger. In a few instances the most serious competition was identified as emerging from within the market itself, with the uneven growth of firms and the emergence of very large companies capable of dominating the market, capturing the most lucrative areas of business and dictating the pattern of trade for the market as a whole. Although such firms probably no longer needed the framework of the inland market to enhance their own businesses they were capable of restraining the expansion of other firms on the market - and it was probably in their interest to do so.

D26. ACTION FOR THE FUTURE

Although keenly aware of the difficult times ahead, the merchants were much less certain as to the kind of strategies required to combat the problems. Their attitudes again seem to reflect the strong sense of individualism that characterises the inland market and a lack of consideration for the importance of collective action. Their prescription for action was focused upon the need to remedy the physical defects of the market and to liberate themselves from the restrictive influences imposed by their local authority landlords. But only one market was taking positive steps in this direction. Several merchants hoped to find some means of limiting the influence of direct deliveries and independent wholesalers within a given radius of the market, but as such action would almost certainly represent an artificial restraint upon trade its chances of success seem remote. Among a minority of merchants there was a recognition of the need to restructure the inland market around a smaller number of stronger firms, to welcome the injection of 'new blood' and new ideas, and to increase the opportunity for more effective concerted action.

There was little enthusiasm for the hypothetical option of going independent except among a number of the largest firms. The reaction of

most merchants was to reaffirm the essential characteristics of an inland market: the elements of choice and competitive pricing and the opportunity for buyers to 'walk the market' before making their purchases. But equally their rejection of the idea carried with it a strong hint of unwillingness to alter customary practices and a reluctance to assume a greater role as a distribution service, particularly noticeable among those smaller firms who do not yet offer a delivery service for their customers.

E27. CONCLUSION

It is not intended here to attempt any overall assessment of the situation facing the inland markets. That will come later after a further round of discussions with those most directly concerned and after the analysis of a postal questionnaire conducted among the markets' principal customers - the fishmongers and fish friers. It is, however, clear from Figure 7 that the inland markets perform a useful function in assembling fish and related products from a diverse range of sources for onward sale to a wide variety of customers.

What does need to be stressed by way of conclusion is, first of all, the individuality of the markets and indeed of their component firms. Each market has its own unique combination of strengths and weaknesses and each presents its own particular problems. The markets vary in size and strength and in the patterns of trade and the nature of their customers. Sometimes these differences reflect the advantages and disadvantages of their regional location, including such factors as access to supplies and the purchasing power of the regional population. But the structure of the individual market also results from the differential growth of firms within the market area and this internal dynamic helps to determine the pattern of relationships within the market.

To a large extent the differentiated structure of the market reflects the diverse attitudes and business strategies adopted by the individual merchants. At most markets there is usually one or more entrepreneurial merchants who have succeeded in building up large businesses through diversification both within and away from the fish trade, almost certainly at the expense of all or most of their competitors trading on the market. In style of trading they have outgrown the constraints imposed by the inland market organisation. But they, in their turn, overshadow the rest of the market and, in some ways, may restrict the opportunities for expansion among other merchants. There is also, usually, a strong nucleus of merchants who, within a more traditional framework, are striving to maintain a lively,

vigorous and expanding business. They may lack the physical capacity, capital or simply management skills to follow the example set by the more entrepreneurial merchants. They urgently need the support of a strong, dynamic market organisation to help realise their goals. But there is also, inevitably, a small but hard core of 'time-serving' traders, who appear to be doing very little business and who are seemingly unwilling to change, to seek new markets, to reinvest or even to tolerate the discomfort and temporary inconvenience of a changing system which will benefit others. They are simply waiting for events to take over, while eking out a living from a declining volume of trade. Their presence on the market may be sufficient to stymie attempts at modernisation and progress, especially in circumstances where change requires the unanimous agreement of all its members and which thus reduces the organisation of the market to the level of its most obstinate, inefficient or uninterested member.

Because of this diversity of structure it is clear that the inland markets as a whole occupy a vulnerable position within the distribution system for fish. Changes in the pattern of supplies and in the purchasing habits of the population, together with new elements of competition within the distribution chain, have each brought new pressures to bear on the inland markets and the challenge of adaptive change. In responding to this challenge the inland markets not only face an over-riding set of common problems but they also share a common fate.

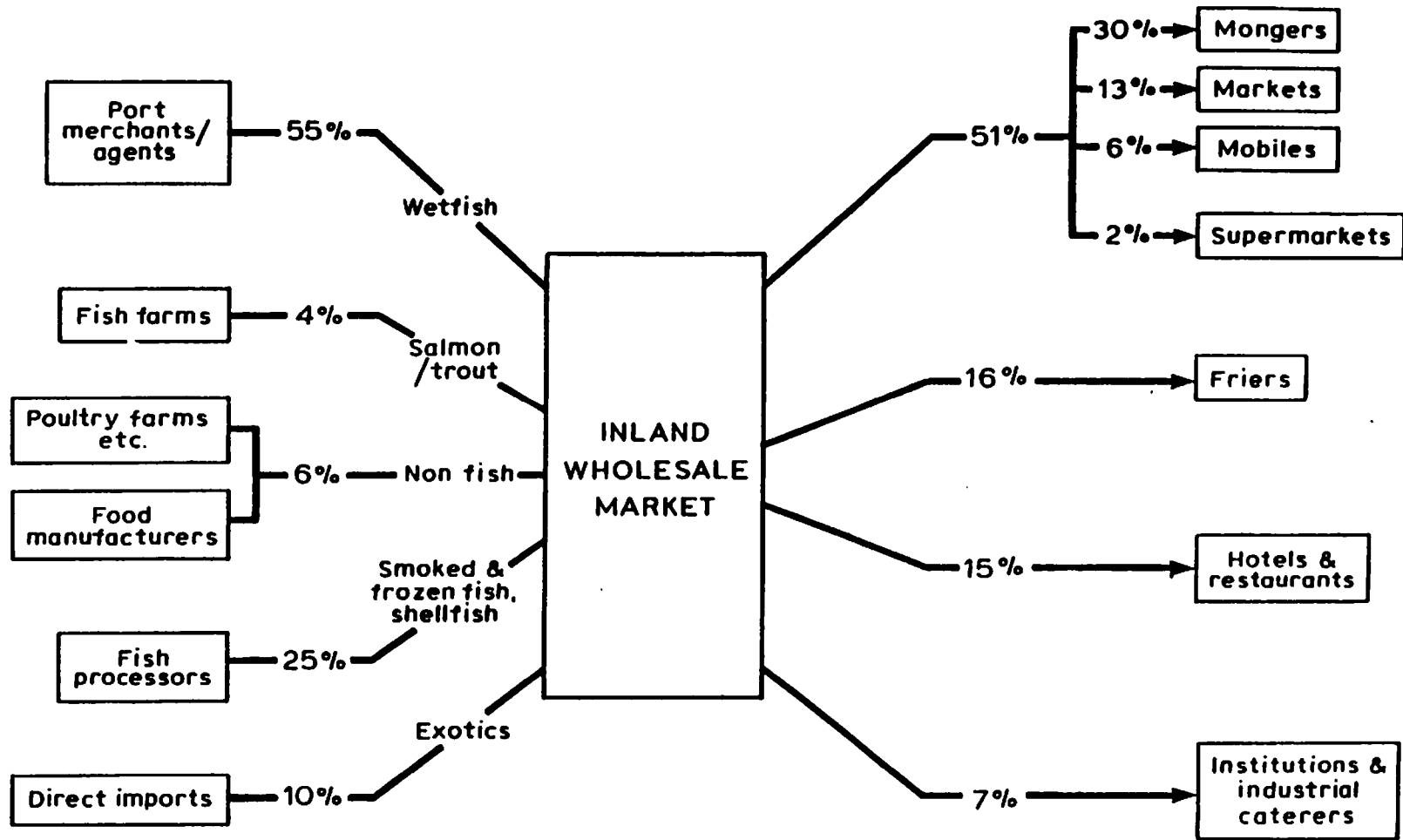


Fig. 7. Summary of the markets' trade

LONDON

BILLINGSGATE MARKET

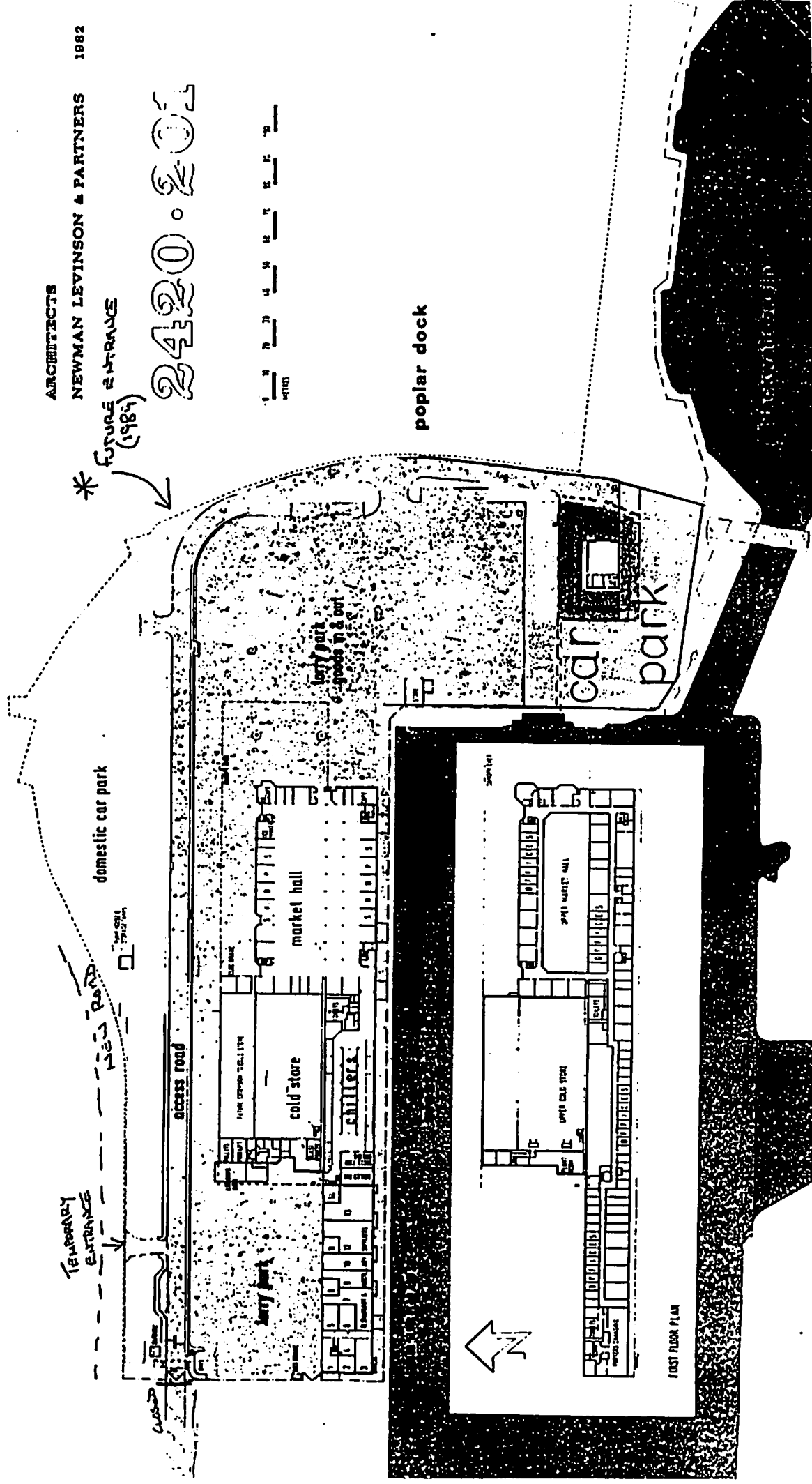
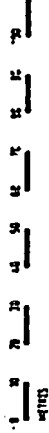
MARKET

ARCHITECTS

NEWMAN LEVINSON & PARTNERS 1982

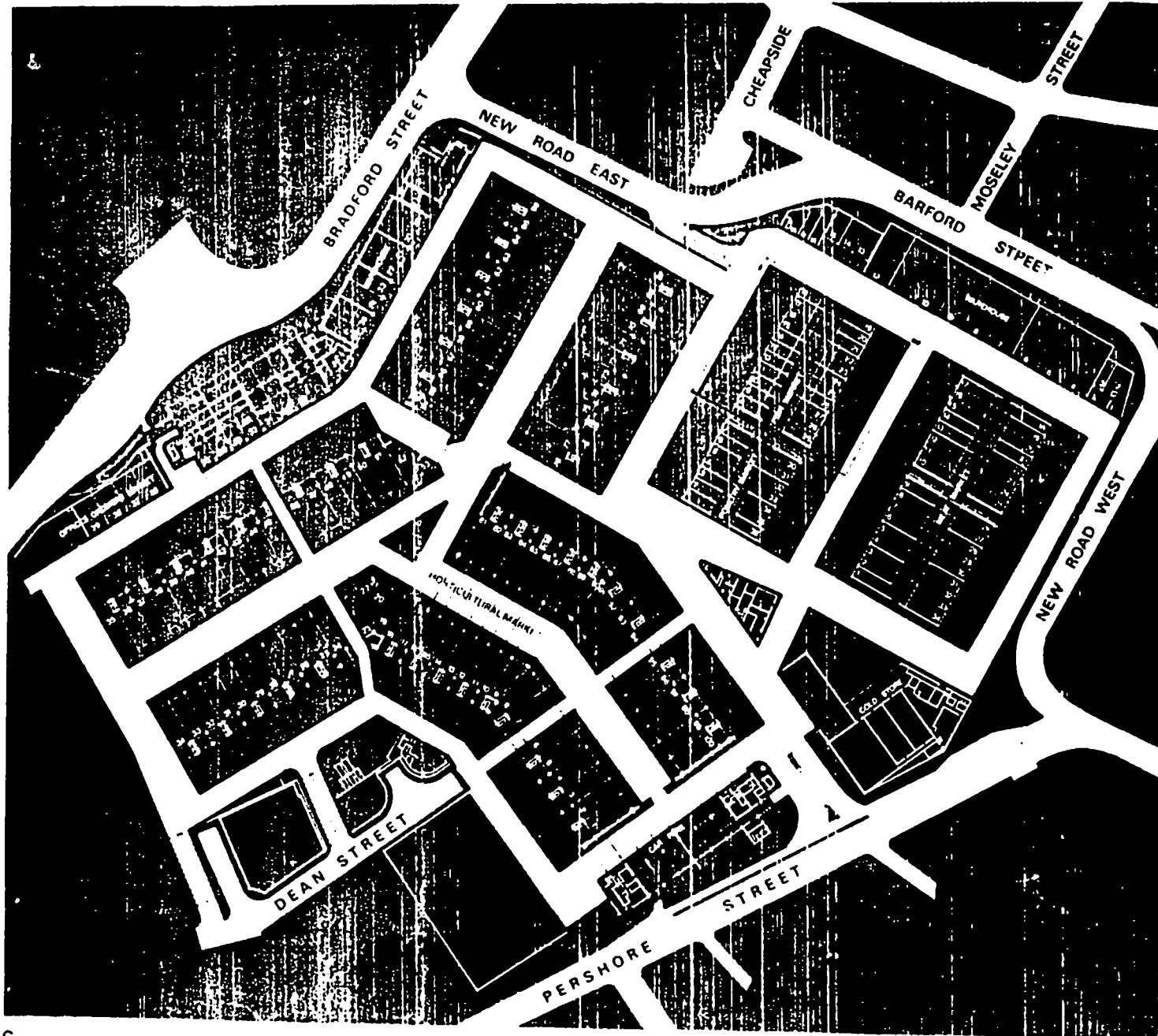
* FUTURE ENTRANCE
(1984)

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FIRST FLOOR PLAN

WHOLESALE MARKETS PRECINCT — Birmingham



Market buildings

1 Meat Market

Area 3,500 sq metres

A two-storey building, the first floor consisting of storage and office space. An environmentally controlled buyer's walk extends along the building on the ground floor between sales stands.

2 Fish and Poultry Market

Area 3,000 sq metres

Similarly designed to the meat market but a roadway divides the ground floor of the fish section and so enables small vehicles to pass inside and circulate easily

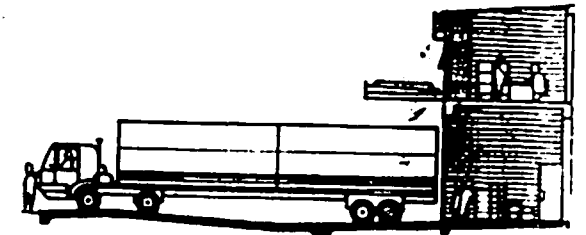
3 Cold Store

One of the largest municipal stores in Britain; it is of three rooms, giving a total capacity of 8,000 cubic metres. With a view to future growth space has been made available near the cold store for a future extension.

4 Horticultural Market

Area 25,300 sq metres

This single storey building is the largest single part of the markets complex. It is a basic 'Y' shape with internal buying facilities geared to the display zones within the market. There are office facilities along the perimeter of the building at mezzanine level. Vehicular access is both internal and external.



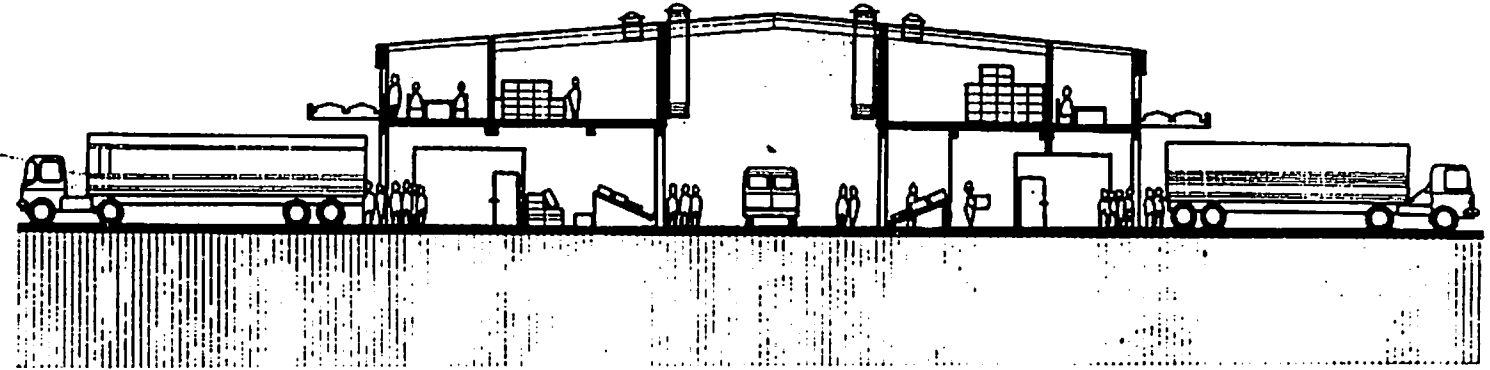
5 Ancillary Buildings

(i) Warehouses. Two large single storey buildings divide into a number of self-contained units.

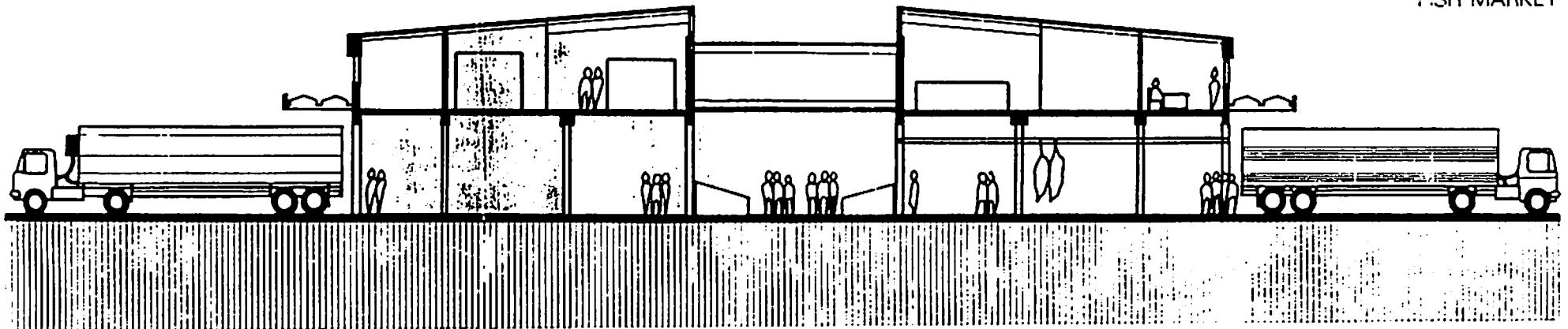
(ii) Growers Market. Here trading space for 30 growers vehicles is provided.

(iii) Offices. These offices, plus a conference suite, are close to the Moat Lane frontage of the markets. Besides the City of Birmingham Markets Department offices there are also additional offices for use by market traders, and a suite for the Veterinary Department.

(iv) Public house, snack bars, shops for ancillary traders and banks, together with two multi-storey vehicle parks for 1,100 cars or vans.

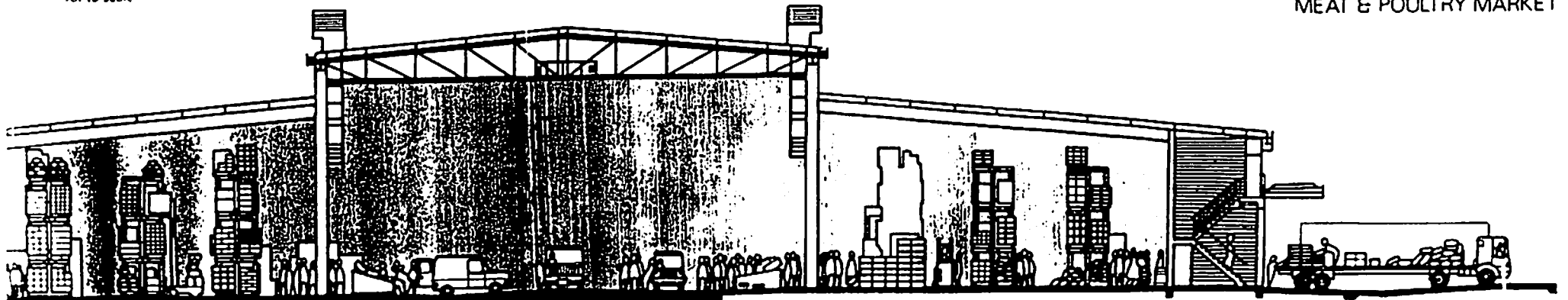


FISH MARKET

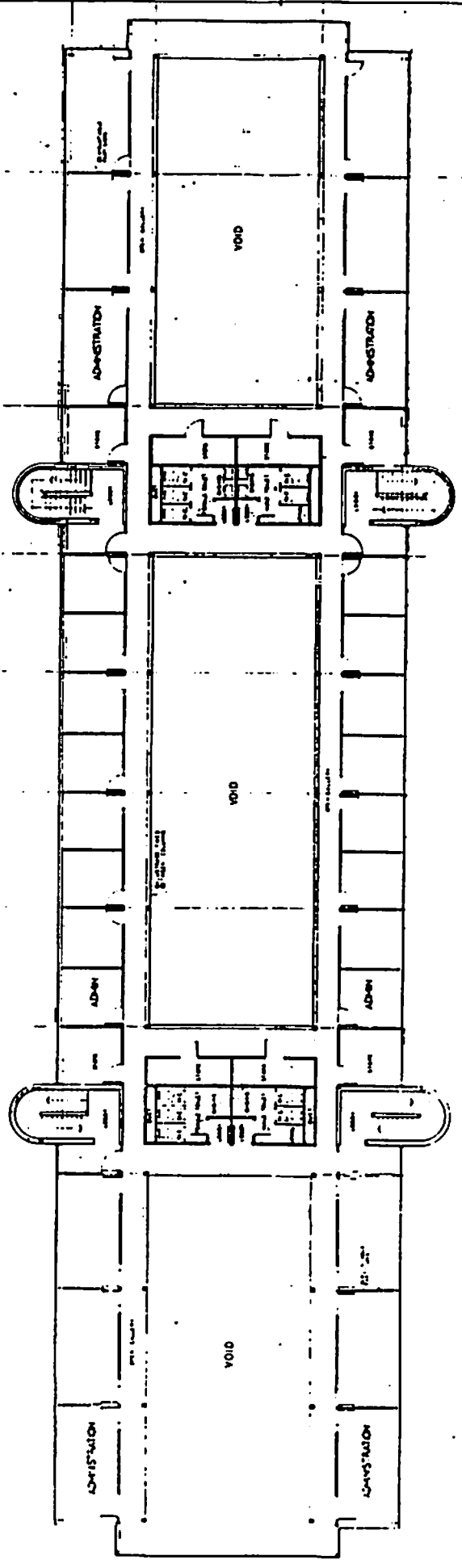


1/10 Scale

MEAT & POULTRY MARKET



HORTICULTURAL MARKET



MEZZANINE LEVEL PLAN GLASGOW FISH MARKET		Scale: 1:100
Peter Black and Partners 21 Princes Street, Glasgow G1 1JF		Project No: 104/032

WHOLESALE FISH MARKET - LIVERPOOL

19/20 70 s.f.	18 166 1/4 s.f.	17 63 1/4 s.f.	16 63 1/4 s.f.	15 105 s.f.	14 80 3/4 s.f.	15 80 3/4 s.f.	12 80 3/4 s.f.	11 104 1/2 s.f.	10 100 s.f.	9 100 s.f.	8 100 s.f.																	
21 276 3/4 s.f.	22 533 sq ft	23 512 1/2 sq. ft.	24 276 3/4 sq. ft.	25 256 1/4 s.f.	26 246 sq. ft	27 307 1/2 sq. ft.	28 338 sq. ft.	29 195 sq. ft.	30 299 sq. ft.	31 520 sq. ft.	32 468 sq. ft.	33 195 sq. ft.	34 195 sq. ft.	35 376 sq. ft.	36 114 sq. ft.	37 633 sq. ft.	38 351 sq. ft.	39 650 sq. ft.	40 390 sq. ft.	41 286 sq. ft.	42 390 sq. ft.	1 399 sq ft	2 285 sq ft	3 555 3/4 sq. ft.	4 327 3/4 sq ft	5 570 sq ft	6 598 1/2 sq ft	7 583 sq ft
BUYERS WALK												BUYERS WALK																
W												OUT																
REFRIGERATOR SPACES 1 2 3 4 144 sq ft 276 sq ft 240 sq ft 175 sq ft FISH MARKET																												

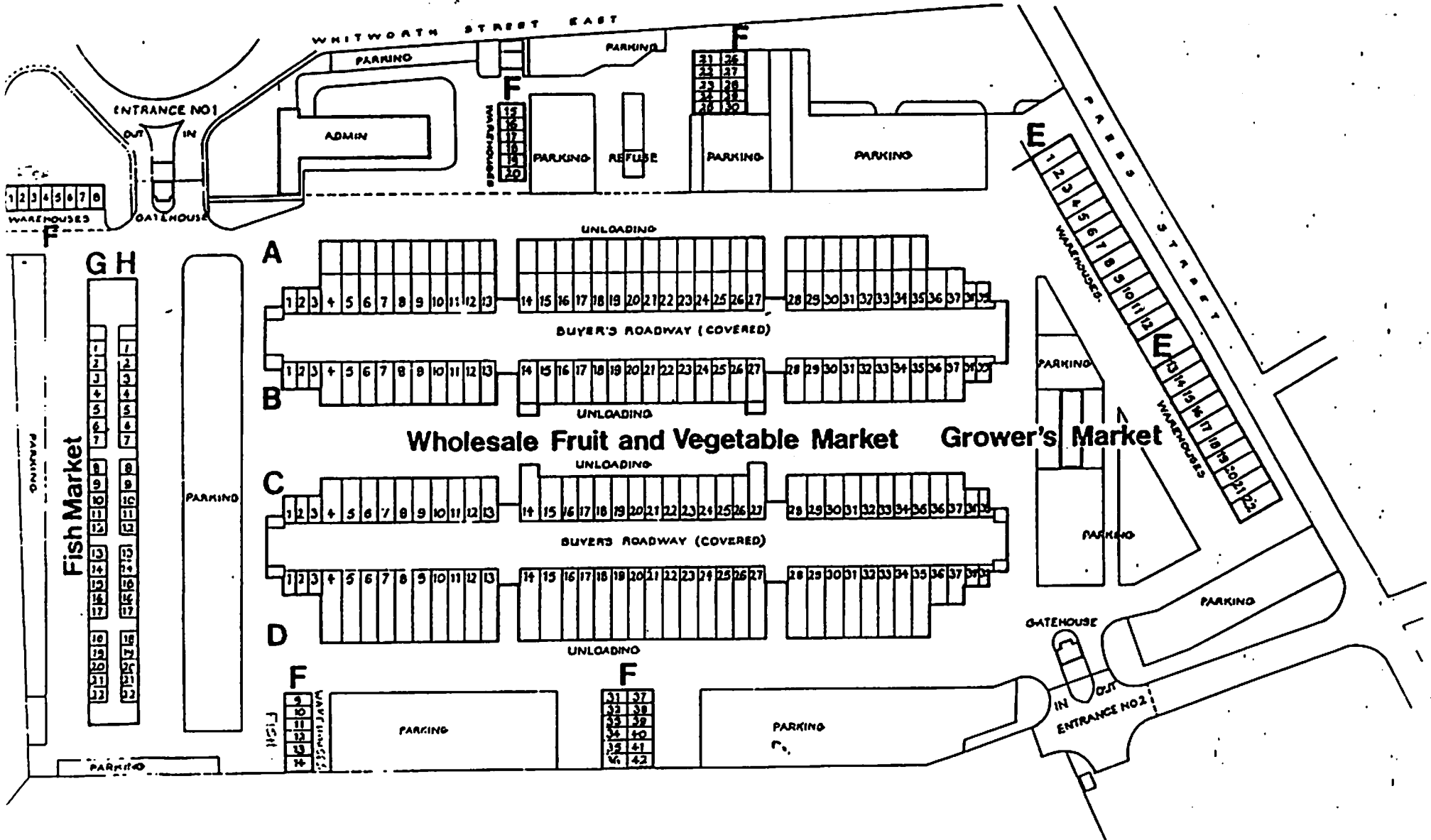
Total area

- 42 Trading Spaces (Fridges and offices in these spaces)
- 4 Refrigerator spaces only
- All space occupied

← TO MANCHESTER.

TO SHEFFIELD →

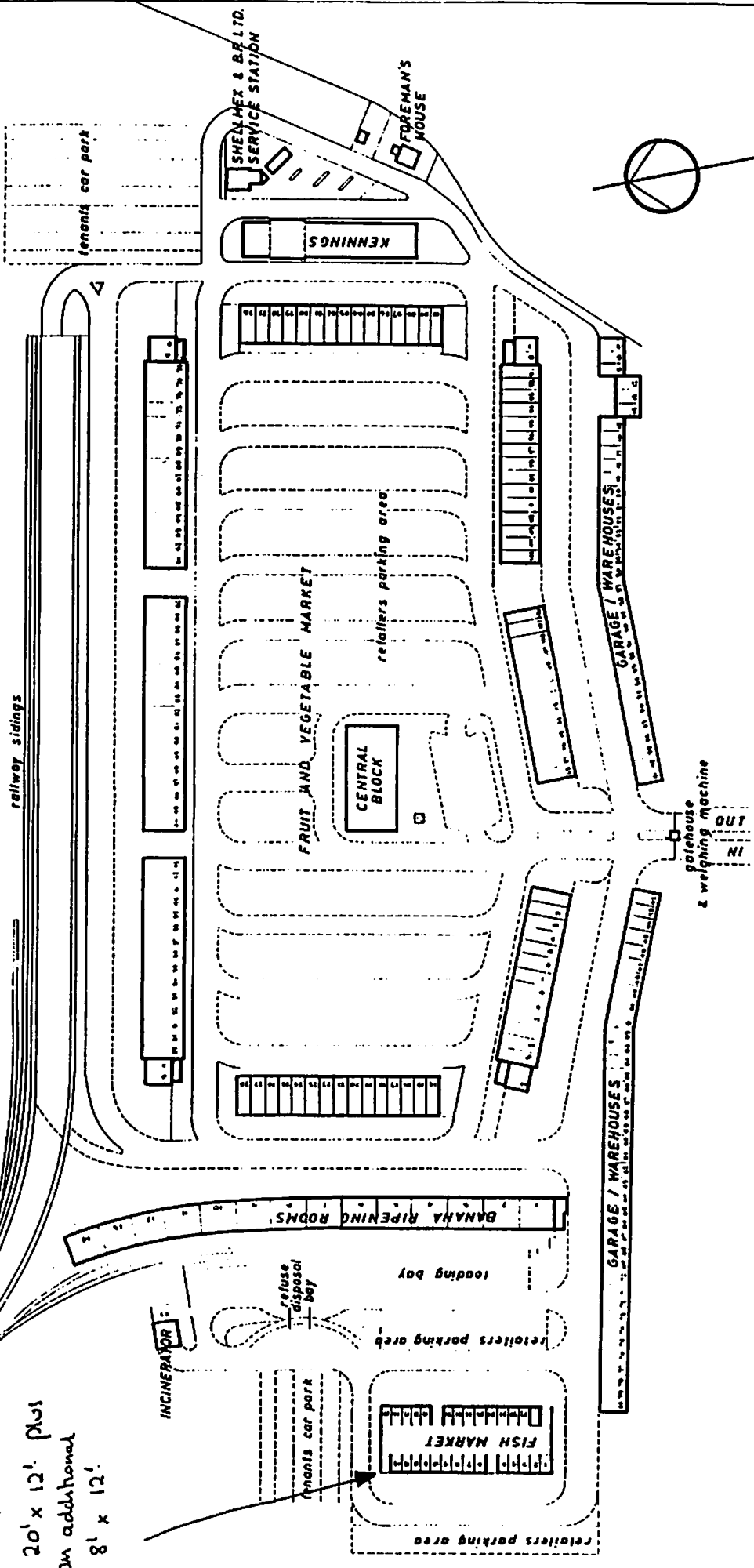
NEW SMITHFIELD MARKET. — MANCHESTER



DRWG. NO 74/168 JAN. 83 d.m.c.

K 76.7

Each Fish unit
20' x 12' plus
on additional
8' x 12'



CITY OF SHEFFIELD WHOLESALE MARKET

SCALE 1:1250

WILLIAM HOLFORD & PARTNERS · ARCHITECTS & PLANNING CONSULTANTS · LIVERPOOL