

prompt a greater than 5% rise in consumption.

From the consumer perspective - particularly in the USA - concerns remain over cooking fish (smell, bones, limited use for leftovers) and salmon is considered less versatile than groundfish - a concern in other markets as well, such as the U.K. In all markets, however, there is a growing interest in health considerations (reduction in fats, cholesterol), environmental factors which have inhibited consumption of seafood (fish taken in polluted waters, chemical residues in farmed products), safety of products (bad publicity), and convenience of preparation. Fish products can score well in these areas, however, and harvestors, processors and distributors are improving their techniques to ensure product safety. In the USA, studies indicate that salmon consumers generally have higher incomes and consume more seafood than the norm.

In the food service sector, longer term planning cycles are evident. There are requirements for a high level of trust, consistent high performance, uniformity and quality of product, supply continuity for large volumes, from suppliers. More stable pricing than at retail is very often possible although price remains the key factor. Appearance would seem to be less important than at retail. There is also evidence that farmed salmon is perceived as being fresher than salmon harvested in the wild but the latter may still be preferred due to colour in certain markets. Food service operators rely heavily on distributors for quality and will quickly change sources of supply if spoilage occurs.

At retail, presentation is all important. A well-trained, informed sales staff is required and sales aids (point of purchase materials, in-store demos) are necessary. Retailers demand the best and want to know all about the product e.g. source, when and where harvested, how handled and shipped, etc. Fresh fish counters very often are not profitable but serve to portray the retailers overall attention to freshness and quality. In the USA, salmon is the fastest growing fish species in terms of per capita consumption followed by catfish, shrimp, and surimi. Newer products such as farmed tilapia are starting to make inroads.

## 6. ELEMENTS OF AN EXPORT MARKET STRATEGY

- A starting point must be the identification of target export markets, countries and/or groups of consumers. The interests of the Eastern Canadian farmed salmon industry are focused almost exclusively in the USA. In the West, export interests are considerably more diversified with the USA, Japan and Europe being the most important markets in that order. Australia, New Zealand and other Pacific rim destinations are also of interest and sales of canned salmon occur in a broad range of markets. There are also other emerging markets such as Mexico which are of potential interest to producers on both Coasts. The Trade Commissioner