

3 B.C. Farmed Salmon Survey

Thirty-eight Japanese salmon importers participated in a survey to determine the market potential for B.C. farmed salmon in Japan. Their answers, although not definitive, are generally representative of their industry's purchasing preferences and practices.

Buyers of Fresh Farmed Salmon

The restaurant trade (which comprises sashimi/sushi, high-class restaurants, and most hotels and family restaurants) is the largest and most important single buyer of imported fresh farmed salmon. Over 55 per cent of all imported Atlantic and King salmon and 40 per cent of all imported Coho salmon are sold to the restaurant trade.

The next most important buyer is the retail trade, which accounts for over 55 per cent of all purchases of imported Coho salmon (fresh and salted), and approximately 35 per cent of all purchases of imported Atlantic and King salmon.

Unlike imported Coho salmon, which dominates the Japanese restaurant trade, Japanese farmed Coho salmon enjoys a 70 per cent market share in the retail trade, compared with a 25 per cent market share in the restaurant trade.

Buyers of Frozen Farmed Salmon

The restaurant trade is the largest buyer of frozen Atlantic and King salmon, accounting for over 40 per cent of all purchases. Frozen Coho salmon represents only 20 per cent of all sales to the restaurant trade. Restaurant demand for frozen salmon is at least 25 per cent lower than for fresh salmon.

The next most important buyer of frozen Atlantic and King salmon is the retail trade, which accounts for between 30 per cent to 40 per cent of all purchases, followed by smokers, accounting for a further 20 per cent of all purchases.

Again, the retail market is the most important buyer of frozen Coho salmon, accounting for almost three-quarters of all imported and Japanese farmed Coho salmon. However, unlike the case of fresh farmed Coho salmon, the restaurant trade is split evenly between Japanese and foreign suppliers.

Table 8

Fresh Farmed Salmon (Per Cent)

	Atlantic	Imported King	Coho	Japanese Coho
Sashimi/Sushi	18	11	11	6
High-Class Restaurants/Hotels	33	38	18	11
Family Restaurants	7	5	10	8
Retail Market: Fresh	23	33	36	46
Retail Market: Salted	8	2	20	25
Smokers	10	7	3	2
Others	0	1	1	1