

## MARKET OPPORTUNITIES FOR SPECIFIC SPECIES

In their 1992-93 post plans, our missions in Italy have underlined the good potential of certain products for the Italian market. These are : salmon, live lobster, clams and cod fillets.

### SALMON

Although fresh salmon and smoked salmon still continue to be considered as luxury products, the increased availability today of cheap farmed salmon is beginning to alter this image. Before the advent of the farmed product, the Italian consumer purchased salmon for its exotic quality, as a sign of opulence. Now, as it becomes more cheaply available it risks losing this cachet, possibly to the extent of being substituted by other products such as smoked swordfish, tuna or sturgeon.

Prior to 1984, only small amounts of fresh salmon were occasionally imported and a relatively limited amount of the imported frozen salmon was thawed and sold as fresh. In the past few years, however, the price of imported fresh salmon has fallen and the market has grown remarkably, amounting to 5,538 t in 1990, supplied mainly by Norway (4,897 t), Denmark (279 t) and the Faroes (177 t).

Italy currently imports around 2000-2500 tonnes of frozen salmon each year, mainly for smoking. The major source of supply is Canada (972 t of Pacific salmon and 17 t of Atlantic salmon in 1990), followed at a distance by Norway (445 t), Denmark (234 t), Faroes (147 t) and the U.S.A. (128 t).

Although most of the smoked salmon consumed in Italy is smoked locally using imported frozen salmon, an increasing amount is also being imported in smoked form (3,066 t purchased in 1990), mainly from Denmark, France and the U.K. Imports of Canadian smoked salmon began only a few years ago, and grew steadily to reach a high of 57 t in 1988, fell off to only 27 t in 1989, and only recovered to 36 t in 1990. The limited interest in the Canadian smoked product is maybe due to an Italian preference for the European smoking method, but also because European packaging quality has generally been superior. Normally, the Italian market prefers large, heavy-smoked sides, dark red in colour and only lightly salted. Due to the fact that the major consumers are restaurants and caterers, it is very important that the flesh be firm, capable of being handled and cut into very fine slices without splitting or sticking to the knife. It is mainly these consumers who also prefer larger sides (3 to 5 kg.), with which there is proportionately little waste. There is, however, also a seasonal market for smaller sides (2-3 Kg.) for family-size gift packs at Christmas time. An interesting market has developed in recent years also for smoked salmon trimmings and scraps for use by caterers and restaurants in sauces and spreads.