

INTRODUCTION

The *World Salmon Marketing Survey* was developed in response to problems facing salmon exporters as identified by Canadian industry and communicated to External Affairs and International Trade Canada (EAITC). The information contained in the document is intended to act as a catalyst in fostering a concerted dialogue between government and industry to generate a more coordinated Canadian approach to the international marketing of Canadian salmon and salmon products. It is also envisaged that the Survey may be a useful vehicle for facilitating the development and implementation of a focused export marketing strategy for the Canadian salmon industry. In turn, this will serve as an invaluable contribution to the Department's annual post planning process where priorities are established and specific activities are identified to be undertaken both in Headquarters and in our domestic and foreign trade offices.

Canadian exporters are under increasing pressure to shift the emphasis of their approaches from the somewhat traditional allocation of products to buyers to the active marketing of Canadian salmon. If they wish to maintain or improve their export performance, Canadian exporters will need to address various factors affecting both demand and dictating promotional activities or initiatives (e.g. new product development).

Canadian exporters are facing increasing competition from other salmon suppliers in countries such as Norway, Chile, Scotland and USA (Alaska). Larger harvests of certain wild salmon species, together with the availability of greater volumes of farmed salmon on a year-round basis, have not only placed downward pressure on prices but have also altered market dynamics dramatically. Suppliers in some other producing countries benefit from substantial government support measures and expanded levels of resources available to promote their salmon exports. These factors, to cite only a few, point to the need for stepped-up Canadian international salmon marketing efforts, within the framework of our capabilities.

Salmon is one of two species (the other being lobster) identified by industry where export marketing activities could benefit from generic promotion. The *World Salmon Marketing Survey* confirms salmon as a species with considerable potential for increased consumption in a number of markets. It is based on the contributions of Trade Commissioners and Commercial Officers at Canadian Trade Offices abroad. The Survey contains information on countries or regional markets and is the largest survey of world markets for salmon ever undertaken by the Canadian Trade Commissioner Service.