

## ITALY

### SUPPLY AND CONSUMPTION

Italy represents one of the smaller, but not insignificant European markets for salmon. Both Atlantic and Pacific salmon are imported into Italy, with the former generally consumed fresh and smoked, and the latter used mainly for smoking. Smoked salmon is also imported, representing about 50 percent of smoked salmon consumption. The market purchases largely un-gutted salmon with a preference for 2-3 and 3-4 kilogram fish, larger salmon are difficult to sell. Salmon is a relatively new product on the market and sales have had little impact on the consumption of other species. The main competition for salmon will likely be from sea bass and sea bream. Sales are best in the period before the Christmas holiday season and during Easter. The ratio of sales is 60 percent catering, and 40 percent retail.

Smoked salmon is looked upon as a "must" food for catered parties, special occasions, and as a hors d'oeuvre in quality restaurants. Italy imports approximately 2,500 tonnes of frozen salmon each year, largely for smoking. The main source of supply is Canada (1,098 tons), followed by the U.S. (434 tons), and Denmark (203 tons). Prior to 1984, only small amounts of fresh salmon were imported into Italy, and a small amount of imported frozen salmon was thawed and sold as fresh. In the past few years, the market for fresh salmon has grown remarkably, increasing to 3,628 tonnes in 1988, with the main suppliers being Denmark (1,940 tons), Norway (906 tons) and Switzerland (637 tons). Most of the smoked salmon consumed in Italy is smoked locally using imported frozen salmon. An increasing quantity of salmon is being imported in smoked form, 2,360 tons in 1988. Imports of Canadian smoked salmon have steadily grown to reach a high of 57 tons in 1988. Limited interest in the Canadian smoked product is due to the Italian preference for European smoking methods, and because European packaging quality is superior.

Italian smokers purchase 1-2 kilogram up to 7-8 kilogram salmon. The market for smaller packs of slices is less developed than for whole sides. Vacuum packaging is the most common form of packaging, with a relatively small niche market in Italy. Sales are equally divided between the retail and catering sectors, but in both sectors, smoked salmon is generally an unfamiliar product for consumers, and current consumption is strongly biased towards the higher income groups in Northern Italy. Traditional taste preferences have been for hard smoked products based on imported sockeye salmon from wild Pacific landings, bright red in colour and strong tasting. The rise in availability of less hard smoked product and paler smoked Atlantic salmon is increasing. The higher quality retail outlets sell Atlantic smoked salmon. The market is seasonal with sales peaking during Christmas. Canada is the major supplier of canned salmon, followed by France and the USA.