

popular "flounder" and "sole" fillets or to replace them when supplies of the latter were short. It is projected that supplies of all types of flatfish in the USA, particularly the premium species, will continue to lag behind demand and that, as a result, sales of Canadian turbot have the potential to expand. This applies to both fresh and frozen fillets.

Mackerel:

The US market has considerable potential for Atlantic mackerel in fresh (head and tail off), frozen (whole for bait and animal feed) and high value-added forms (marinated, smoked, etc). The market is fragmented and does not allow for bulk, high-volume or "commodity" production. Even the fresh market is highly specialized in that it involves a specialized distribution network, e.g., to serve the ethnic-oriented retail outlets. Therefore, marketing these products would involve a more sophisticated approach. However, given the relatively low raw material cost, the mackerel business in the USA could be profitable for Canadian suppliers.

Canadian Shellfish Species:

Shrimp, lobster, crab, mussels and clams have great potential because either they represent small shares of the market segment they are in or the total market segment is growing. The only limit is Canada's ability to supply.

General:

In the U.S. opportunities exist for all Canadian seafood products except for those that are produced in excess of market demand (poor quality cod blocks or cello 5 fillets, saltfish in bulk, etc). In relative terms, especially from the point of view of small/medium processors, opportunities are greater for specialty products (differentiated according to traditional or ethnic taste -- smoked fish, marinated fish, etc), fresh fillets (if marketed properly and if quality is assured), and fresh/live shellfish (lobster, shrimp, mussels, etc.)