effectively precludes European and other suppliers of farmed salmon from exploiting canned salmon markets which are thus left to suppliers of wild capture Pacific species. Alaska, and likely Russia in the future, represent the stiffest competition. (Approximately 50% of the B.C. salmon harvest is canned).

Generic marketing programs instituted by the B.C. Salmon Marketing Council, the B.C. Farmed Salmon Institute - a wholly-owned subsidiary of the B.C. Salmon Farmers Association - and the New Brunswich Salmon Growers Association deserve recognition as an industry accomplishment and strength. They represent models which other segments of the Canadian fish and seafood industry might wish to emulate.

B. <u>WEAKNESSES</u>

Although the Canadian image is solid, the approach to marketing tends to be fragmented and lacking in cooperation - East vs West and wild vs farmed competition dilutes the effectiveness of Canadian promotional efforts. So too, Provincial/regional identification, as opposed to establishing a single Canadian image, is not helpful in many markets. Even in a regional context, there has been a perception in markets such as the USA, that growers/processors are not acting as a cohesive unit. Consumers in volume markets are not sufficiently sophisticated to perceive differences and reasonable prices and quality will win the day. Small niche markets, where price is not determinant, are the exception. The "branding" question needs to be addressed carefully in terms of image, identity and pricing.

The historic dependence on governments for funding assistance (capital expenditures, international promotion) will become more difficult in a climate of restraint. Funding for international marketing must, therefore, become more industry generated.

With respect to transportation/ distribution systems, the somewhat limited access to gateways in certain more remote offshore markets with high potential, frequently places Canadian exporters at a disadvantage relative to their competition.

Limited industry awareness of opportunities in particular markets points to a lack of coordinated market intelligence such that wild and farmed interests can work more effectively in serving markets and making production decisions. Seasonality, coordinated harvesting of farmed salmon in relation to wild product availability, together with timing for production of particular market forms are questions which need to be addressed further as part of the marketing spectrum. There is a challenge for industry to maintain its existing customer base.

Small and medium sized firms are often not in a position to provide the necessry supply continuity demanded by larger offshore buyers.