

1 Introduction

Japan is the world's largest market for fresh, frozen and salted salmon, with an annual consumption of more than 300 000 metric tons. This represents one of the most important markets for B.C. farmed salmon producers, whose industry's future growth is significantly export-driven.

In order to clearly identify potential export sales to Japan, the Canadian Embassy in Tokyo, in conjunction with the B.C. Salmon Farmers Association, conducted a survey of different Japanese importers of salmon. The survey, which was undertaken in March 1989, serves as the basis of this market study.

2 Market Background

Japanese Salmon Consumption

Salmon consumption in Japan has grown in proportion to increases in personal disposable income. As Japanese consumers have become relatively more wealthy, their preferences have shifted towards what is perceived as being a superior fish — the salmon.

Notwithstanding the exceptional 1988 market, when salmon consumption fell because of supply shortages and high prices, it is expected that salmon consumption will experience strong and sustained growth over the medium and long-term. This will come as a result of an abundant supply situation created, in part, by increased domestic and foreign farmed salmon production.

Table 1

Supply of Salmon in Japan (000 Metric Tons)

	1984	1985	1986	1987	1988
Beginning Inventory (January 1)	76.5	66.3	99.0	85.8	71.2
Domestic Catch — Total	171.3	219.4	184.9	200.2	185.9
Imports — Total	94.6	118.1	115.4	111.4	133.7
Total Supply Available	342.4	403.8	399.3	397.4	390.8
Ending Inventory (December 31)	66.3	99.0	85.8	67.1	84.6
Apparent Consumption	276.1	304.8	313.5	330.3	306.2