

FINLAND

SUPPLY AND CONSUMPTION

Per capita consumption of fish in Finland during 1989 was 18.8 kilograms, compared with 20.4 kilograms for beef and 31.8 kilograms for pork. The catch of wild salmon in 1989 was estimated at 1,051 tons. The production of rainbow trout by aquaculture totalled 20,000 tons. Consumption of farmed trout during 1989 was 4 kilograms per capita. In addition to the domestic catch of *Salmo salar*, 524 tons of frozen fillets were imported; 436 tons were sourced from Norway, 84 tons from Sweden, 3 tons from Canada, and 1 ton from Denmark. Total consumption of salmon was 315 grams per capita in 1989.

The production of farmed trout has doubled over the last five years and the industry is close to the point of saturation. The trend has been reflected in retail prices which makes trout one of the least expensive seafood items on the market. Finnish catches of wild salmon were remarkably good in 1989 and 1990 which has brought down the retail prices. Salmon and trout are retailed fresh, whole, gutted and filleted. Imported frozen salmon is not suitable for making *gravlax*, the main use of salmon in Finland. The major competitor for Canadian frozen salmon fillets are domestically farmed trout. The production of farmed trout increased from 2 million kilograms in 1975 up to 20 million kilograms in 1989. During the same period, the importation of frozen salmon fillets declined from \$250,000 in 1976, to \$40,000 in 1989. Domestic farmed trout fills the difference between demand and supply when the domestic catch of salmon is not sufficient.

There are four main wholesale and retail chains in Finland through which 95 percent of the Finnish food trade moves for both retail and institutional. There is only one main importer of a wide variety of seafood products. The importer purchases selected Canadian seafood items from importers in continental Europe because they are in a position to buy whole container loads from Canada.

POST PROPOSALS

Finnish fisheries experts predict the present catch level for wild salmon will prevail and prices will remain moderate. Rainbow trout farming has reached capacity and prices will remain competitive. The importation of salmon, except boneless fillets, is restricted by import permits which can be hard to obtain. Canned salmon is not produced locally and imports take place without restrictions. In 1989, 185 tons of salmon was imported, 109 tons from the USSR and 76 tons from Thailand. During the first few months of 1990, 190 tons of frozen salmon fillets were imported from Norway and 44 tons from Sweden, with the CIF price average approximately \$12.25 per kilogram. As long as the present market situation prevails it will be difficult to increase the market share of frozen Canadian salmon fillets in Finland.