

- There are no expectations of further increases in salmon consumption after beef liberalization takes effect in 1992, on the contrary, a decline is expected.
- Aquaculture Trends: Product improvement and estimates of fixed customers mean good import prospects for 1990 - 90,000 tonnes.
- There will be increased sales promotion in the Japanese market.
- There will be increased Coho imports from Chile and other imports will also increase, but freezer methods need enhancing and price/quality fluctuation should be avoided. Standardized, stabilized products are needed for the Japanese market, probably requiring increased processing.
- There are no brand recognition at the retail level, as there are no country of origin labelling on the package in supermarkets. Exporters should consider adding this feature to increase recognition, as seals or other identification methods are being considered to identify it to the customer and assist sales.
- Consumption trends: there is a lower consumption rate as at any price higher than Y 180 / 100g the consumption level reduces to 4 kg/per family. Below Y 170 / 100g, consumption jumps to 5-6 kg per family, illustrating the persistent relationship between price levels and large consumption.

**Smoked Salmon Market in Europe - G. O'Sullivan, Irish Sea Fisheries Board, Paris Office, France.**

- Norwegian and Scottish salmon are increasing to 64 per cent of the market, with Pacific salmon comprising the other 36 per cent.
- France is the largest market for this product in Europe, which itself is one of the fastest growing in the seafood sector, increasing at an annual rate of 10-20 per cent.
- Acceleration of farmed salmon production has spurred the production of smoked salmon. The 1989 total EEC output was 36,000 tonnes, the main producers being France, UK, Denmark, FRG and Norway. Production is increasing by 10 per cent per year, with a small number of companies producing a high percentage - 20 smokers produce over 40 per cent of total output, out of 200 companies involved in production.
- There is a large import dependency, with W. Germany as the most dependant, followed by Italy and France.