edible offal. Canada currently provides 99 percent of the U.S. market for quail.

Meatpackers of both beef and pork are becoming increasingly concentrated. In 1989 the top three firms accounted for more than 70 percent of the total cattle slaughter. To compensate for declining consumption, beef processors are moving to the production of higher value-added products and branded product lines.

Canada is a major supplier of red meat to the U.S. In 1991 Canada supplied 22 percent of U.S. red meat imports, slightly behind Australia which supplied 24 percent. Canadian exports accounted for 40 percent of the total fresh/chilled pork and 25 percent of the other fresh/chilled meats or frozen beef. Canada supplied 25 percent of the total fresh/chilled or frozen beef imported by the U.S.

Fish and Shellfish

Per capita consumption of fish and shellfish fell to 14.9 pounds in 1991. However, consumer demand for seafood has remained relatively constant, especially value-added frozen food items, at around 15 pounds per person per year, but chicken and turkey products appear to be winning market share.

There may be room for expansion in seafood sales at the level of the individual supermarket chains through specialty seafood counters.

Fruit and Vegetables

The trend toward "healthy" foods has meant a decline in the consumption of canned vegetables over the past ten years. At the same time, the demand for fresh and frozen vegetables has increased. The consumption of canned foods is likely to decline further as consumer preference shifts toward fresh-frozen and frozen convenience foods which emphasize nutrition. As part of this trend, the demand for salad dressings has also increased as more restaurants and grocers install salad bars.

Frozen Foods

While the frozen food industry is a mature industry, growth is predicted in the areas of frozen breakfast items, ethnic foods and low-calorie items.

The growing number of single-parent households, dual-income families and working women has reduced the time available at home for meal preparation and spurred the demand for frozen convenience foods. An increase in the number of microwave ovens has also helped frozen food manufacturers. At present 70 percent of all U.S. households have a microwave oven, up from 10 percent in 1980. Many major food companies state that 80 percent of their product line will be microwavable by 1995. As well, the growing involvement of children in meal planning will mean that meals which are easy to prepare and serve will see a rise in sales.

Ethnic Foods

Italian foods, pizza and sauces continue to be popular with the American consumer and sales are projected to exceed $11 billion by the year 2000. Hispanic foods are the fastest growing segment of the ethnic market and the forecast for this sector is $6 billion in annual sales by the end of this century. Pizzerias and Mexican restaurants are the two fastest growing types of foodservice establishments. Oriental foods are expected to exceed $1.5 billion by the year 2000. Sales of spicy Thai and Korean foods should continue to grow, and the freshness, convenience and quality associated with Oriental foods will fit the consumer's desire for healthful, easy-to-prepare meals.

Pasta consumption in the U.S. is expected to continue to rise into the next decade as health-conscious Americans substitute complex carbohydrates for saturated fats. Statistics indicate a steady upward trend in consumption. U.S. per capita consumption was 18.4 lbs in 1990, up from 12.8 in 1980. In good or bad economic times pasta sells well because it is a good consumer value. The annual sales of most companies have increased 3 to 5 percent.