

Introduction

The Department of External Affairs sponsored a mission of Atlantic herring roe producers to Japan, November 26 - December 2, 1988. The purpose of the mission was threefold: (1) to obtain a better understanding of the market for flavoured roe in view of the substantial increases in exports in recent years; (2) to investigate quality standards of Canadian and competing roe products; and (3) to assess potential promotional activities in order to secure greater market share and thus to enable increased utilization of expanding east coast herring landings.

Herring roe or "kazunoko" is a traditional food of the Japanese, consumed predominantly during the festive New Year's season. The Japanese consumer purchases kazunoko in two forms, as a salted product ("shio kazunoko") and as a ready to eat seasoned roe product ("ajitsuke kazunoko"). British Columbia herring roe is processed as the former; however, the high price of shio kazunoko limits consumption to the festive New Year's season. The seasoned roe is referred to as a "sozai" or an accompaniment dish, one which is suitable for everyday consumption. The price is more affordable and increasingly large quantities are being consumed in Japan. It is this kazunoko product, developed as a means of utilizing the abundant Atlantic Canadian herring roe resource, which shows the greatest potential for market expansion. Atlantic roe is used to produce a variety of flavoured end products which are sold as ready to eat foods and as ingredients with other prepared products. These products compete at the upper end of the range with "shio kazunoko" and at the lower end with capelin and pollock roe.

To meet consumer demands the Japanese industry has turned to various world suppliers of herring roe. The product quality from different parts of the world varies tremendously due to processing, handling techniques and inherent qualities of the roe. Currently, Canada dominates the Atlantic roe market with about 80% market share followed by Ireland with 19%. Canadian exports in 1988 were some 7,000 tonnes valued at about \$80 million.

The mission was led by Ron Bulmer, President of the Fisheries Council of Canada and consisted of seven representatives (see attached list) including Kimberley Watson, Research and Productivity Council, New Brunswick. Ms. Watson, a fisheries technologist, who recently completed a study on methods to improve the standard of Atlantic Canadian herring roe in Japan.

The group visited herring roe processors in Niigata, Sapporo and Yoichi and examined at first hand the production of herring roe. Visits were also made to