

Table 9

Frozen Farmed Salmon (Per Cent)

	Atlantic	Imported King	Coho	Japanese Coho
Sashimi/Sushi	7	11	2	3
High-Class Restaurants/Hotels	27	21	8	7
Family Restaurants	8	8	10	10
Retail Market: Fresh	19	22	27	31
Retail Market: Salted	12	17	45	41
Smokers	19	18	11	5
Others	8	2	0	1

Growth Estimates for Farmed Salmon Market

The companies interviewed were of the opinion that the market for frozen farmed Coho will experience the greatest growth, at slightly less than 10 per cent per annum, from its current level of 3 500 metric tons to 6 000 metric tons in 1995.

In 1988, frozen farmed Coho salmon had approximately 22 per cent of the total Japanese market for farmed salmon. According to the survey's estimates, this market share will increase by 5 to 27 per cent by 1995. It will constitute the second most important market after frozen Atlantic salmon, which is expected to enjoy a 37 per cent market share in 1995, up by 11 per cent from its 1988 market share of 26 per cent. This growth is an estimated average annual sales increase of 9 per cent for frozen farmed Atlantic salmon over the period 1989 to 1995.

It is estimated that by 1995 frozen Atlantic and Coho salmon will account for nearly two-thirds of all farmed salmon sales in Japan. Sales of frozen King salmon are expected to account for 10 per cent of all farmed salmon sales, meaning that by 1995 three-quarters of all farmed salmon sold in Japan will be frozen salmon.

Currently, fresh farmed salmon accounts for almost 40 per cent of all sales, with fresh farmed Atlantic salmon accounting for two-thirds of these sales. This trend will continue into 1995 but the relative importance of fresh farmed Atlantic salmon will decline as more and more market share is acquired by frozen farmed salmon.

Table 10

Farmed Salmon Estimated Market Size (Metric Tons)

	1988	1989	1995
Atlantic Salmon			
Fresh	1 900	2 500	3 300
Frozen	1 900	4 200	7 800
King			
Fresh	400	600	1 000
Frozen	1 000	1 100	2 000
Coho			
Fresh	400	500	1 000
Frozen	1 500	3 500	6 000
Total	7 100	12 400	21 100

Japanese Preferences

Size

Japanese importers indicated the following size preferences:

Atlantic salmon (fresh and frozen): 2 to 3 kg or 3 to 4 kg

Coho salmon (frozen): 2 to 3 kg or 3 to 4 kg

King salmon (fresh and frozen): no size preference

Colour

Japanese importers indicated overwhelmingly that they prefer the colour of King and Coho salmon over that of Atlantic salmon.