

8. CURRENT SITUATION AND OUTLOOK: A PRODUCT-BY-PRODUCT SURVEY

Customs categories and tariffs for all products will be found in Appendix 1.

8.1 Salmon

Total salmon products market, 1988:

French production	2 000 tonnes
Imports of fresh salmon	21 347 tonnes
Imports of frozen salmon	20 324 tonnes
Imports of smoked salmon	1 554 tonnes
Imports of canned salmon	3 566 tonnes
Total	48 791 tonnes

Canada operates only in the frozen and canned salmon market sectors. Shipments of fresh salmon have been brought in by air on a trial basis, but the experiments do not appear to have yielded any conclusive results. A very small quantity of smoked salmon is also imported from Canada.

8.1.1 Frozen salmon

Competing products: fresh salmon (which is available in large quantities on the French market) and imported smoked salmon.

Competing suppliers: Norway, the UK, the United States, the Faeroe Islands and Denmark.

Frozen salmon is subject to a customs duty of 2%.

France imported 20 324 tonnes of frozen salmon in 1988, of which 3 010 tonnes came from Canada. Canada's share of the market is steadily shrinking.

Traditionally, Canadian salmon has been used for processing into smoked salmon. Approximately 10 400 tonnes of smoked salmon were sold in France in 1988, of which 1 500 tonnes were imported. The remaining 8 900 tonnes were smoked in France from some 14 800 tonnes of imported salmon. Canada has been gradually displaced in this market by Norway. Only an estimated 10% to 20% of the smoked salmon sold in France is now prepared from salmon of Canadian origin, which is regarded as low-quality feedstock for the smoked product.