

## HIGHLIGHTS

1. During Fiscal Year 1989-90, twenty-eight Canadian trade offices abroad identified the fish and seafood sector as a priority for export market development. Distribution of the trade offices included 6 posts in the United States, 5 posts in Japan and the Pacific Rim countries, 13 posts in Western Europe and the Nordic countries, 2 posts in Eastern Europe and 2 posts in other areas.
2. With the exception of Portugal, where a decline was expected, all trade offices with a priority on fish and seafood projected stable or increased market demand for seafood in FY 1989-90. Countries where the highest market growth was expected, included Korea (Seoul) 16.7 percent, Italy (Milan) 16.7 percent for primary products, West Germany (Dusseldorf) 13.0 percent, Brazil (Sao Paulo) 12.5 percent, Japan (Tokyo) 11.5 percent, Spain (Madrid) 10.0 percent, Sweden (Stockholm) 9.7 percent for primary products and 9.1 percent for secondary products, and Switzerland (Berne) 9.4 percent.
3. Canada's market share reported by 18 posts was 5.0 percent or less, indicating that there is significant room for increased Canadian exports. Market areas with a Canadian share higher than 5.0 percent included New York 28.0 percent, East Germany (Warsaw) 24.0 percent, Detroit 20.0 percent, Poland (Warsaw) 17.0 percent, Portugal (Lisbon) 13.0 percent, Switzerland (Berne) 11.6 percent for primary products and 6.0 percent for processed products, Boston 10.0 percent, Atlanta 8.0 percent, Sweden (Stockholm) 7.5 percent for primary products and 5.9 percent for processed products, Australia (Sydney) 6.8 percent and Brazil (Sao Paulo) 6.0 percent. Areas projected for significant improvement in Canada's market share included Australia (Sydney) 75.0 percent, Korea (Seoul) 40.0 percent, Austria (Vienna) 35.1 percent, Hong Kong 26.7 percent, and Finland (Helsinki) and Ireland (Dublin) both at 25.0 percent.
4. Many trade offices projected significant increases in Canadian seafood exports in FY 1989-90, particularly in Japan and the Pacific Rim markets and Western Europe. The highest percentage growth was projected for Australia (Sydney) 78.6 percent, Korea (Seoul) 66.7 percent, Austria (Vienna) 40.0 percent, Brazil (Sao Paulo) 37.5 percent and Hong Kong 31.3 percent. Canadian exports were also expected to decline in Eastern Europe in Poland (Warsaw) 21.1 percent and East Germany (Warsaw) 16.7 percent.
5. The qualitative assessment by Canadian trade offices of the current status of Canadian fish exports indicates that Canadian products are well established and growing in 8 market areas, mature with little growth in 5 areas, and small but expanding in 13 market areas. However, estimates of long-term potential are encouraging for many areas. For FY 1989-90, 12 trade offices projected a cumulative three-year growth potential of \$100 million or more, 1 trade office projected growth potential of \$60-100 million, 7 trade offices projected growth potential of \$30-60 million, 2 trade offices projected growth potential of \$15-30 million, and 3 trade offices projected growth potential of \$5-15 million.
6. Canada's main global competitors, as identified by posts, are the United States and Norway. At the same time, Denmark, the Netherlands, Iceland and Spain are important regional competitors in Europe and the Atlantic Rim markets. Equally, Japan, Taiwan and Korea are important competitors in Pacific markets.
7. The number of specific new export opportunities for fish and seafood continues to rise. For FY 1989-90 Canadian trade offices identified 189 opportunities. This compares to 176 export opportunities identified for FY 1988-89 and 175 for FY 1987-88. Numbers of export opportunities identified by major species or product categories included Salmon (23), Lobster (20), Cod (19), Roe (13), Shrimp (10), Crab (9), Clams (7), Herring (7), Squid (5), Redfish (5) and Hake (5).