

enhance the health aspects of the product and reduce its salt content. Prices should remain competitive with other fish products to sustain and increase roe sales in Japan.

10) Alaska has successfully developed a series of high-value by-products including cod heads, bellies and milt for the Asian markets, and they are developing markets for cod livers, roe, skins, salted swim bladders and skins. Salmon milt is a newly emerging product for the Taiwanese market. Boneless salmon mince can be combined with surimi for soups, salmon jerky, chili, fish sausages etc. Skins are frozen and shipped to Taiwan and Korea to be processed into leather products. Hydrolysed salmon protein paste can be used in pet food, livestock and aquaculture feedstocks and from shrimp shells, the extracted chitin is being processed into chitison.

11) Changing consumption patterns in Japan include a blurring of food categories and types and more fashion trends in fish as a result of greater travel abroad by consumers. It is a buyers market in food in Japan, especially in fish, with an increase in fresh and live importation. There has been substantial growth in the last few years in the variety of supermarket and chain department stores. The nature of the demand has also changed i.e. no longer whole fish, but dressed and processed fish (i.e. fillet or steaks, etc.).

12) The five year forecast in Europe is for a 35 percent growth in the market - 2 million tonnes - mostly in aquaculture products and imports - 1.1 million tonnes and the F.R.G. and U.K. are the strongest markets. Both are recovering from the nematode-induced collapse. There are three markets for ready-meal products, the frozen, chilled and shelf-stable products. Fish is the most ideal product for future consumer trends if marketing changes from being production-oriented to more consumer-oriented, using consumer input. Suggested guidelines for future marketing efforts include concentrate on catering expansion first, place emphasis on convenience and the healthy aspects of the product. Promote recognition of the wide variety of species available in sophisticated innovative meals, particularly for children and for holidays.

13) In 1989 the growth in salmon production exceeded current consumption levels, but Norway is still selling more (50 percent over 1988). The Norwegian increase is halting and production may well decline. The freezing/storage process is actually attracting less product than expected, leading to price stabilisation much sooner than expected.

14) November 1988 marked the end of the traditional salmon market in Japan, as now demand has been more than met by supply and competition is apparent where before it was seller's market. Wild