

## POST OBSERVATIONS

The Canadian Embassy in Vienna has again selected the fisheries, sea products and services sector as a priority area for export market development activities for 1993/94. Each year Canadian posts around the world provide summaries in synopsis form of their work-plans for the upcoming fiscal year. The purpose of the synopsis is to provide those engaged in the process of promoting exports from Canada with the means to obtain condensed market data and information on export opportunities at an early stage in the planning process. Submissions from the Canadian Embassy in Vienna relating to the fisheries and seafood sector are summarized below.

| Market Data      | Two Years Ago | One Year Ago | Current Year | Next Year  |
|------------------|---------------|--------------|--------------|------------|
| Market Size      | 151.00 \$M    | 172.00 \$M   | 180.00 \$M   | 190.00 \$M |
| Canadian Exports | 5.40 \$M      | 4.80 \$M     | 5.50 \$M     | 5.60 \$M   |
| Market Share     | 3.60 %        | 2.80 %       | 3.00 %       | 3.00 %     |

The Canadian Embassy in Vienna has estimated that the cumulative three-year export potential for Canadian products in the fishery sector to be between \$15-\$30 million. Major competing suppliers to the Austrian market are the European Common Market (61.0%), and Norway (4.1%). The Post in Vienna notes that the Canadian seafood export market share in Austria is well established and growing.

Key factors contributing to the current successful Canadian fisheries exports include: 1) import restrictions are not a significant impediment in the fisheries sector; 2) trade fair activity; 3) Canada is one of the few sources of supply; and, 4) a strong sectoral capability in Canada. However, key factors for Canadian fisheries exports not reaching market potential include: 1) non-competitive pricing; and, 2) market prospects have not been adequately explored.

The Canadian Embassy in Vienna has identified 4 seafood products for which it believes there are good prospects for Canadian seafood exporters, as listed below.

1. Crustaceans
2. Molluscs
3. High-priced end products
4. Salmon

Canadian Trade Officers in Vienna have stated the potential market for fish products is currently under-exploited by Canadian firms and provides excellent opportunities for a variety of specialty seafood products.

### SALMON

Total salmon and salmonoid consumption in Austria is approximately 0.7 kilograms per capita a year. Salmon exports to Austria generally travel through four main distributors (Nordsee, Cerny, Schenkel and Wiking) whom are importers, wholesalers and retailers and/or chains (Nordsee). Deliveries are spread over the entire calendar year, but the pre-Christmas period is when demand increases by up to 30