

diminishing promotional project funds. By combining elements of the agri-food, fish, consumer and tourism programs, the Embassy is able to obtain a much larger return for all sectors than would each sector functioning in isolation. For example, in addition to Canadian tourism, the fish and agri-food sectors were major beneficiaries (e.g., 24 tonnes of lobster; 1 tonne of smoked salmon; 3 tonnes of beef; 3000 bottles of wine, and so on) of the Tourism Program's investment in the May 1996 Canadian food and tourism promotion at the Prince Hotels and Resorts chain.

In addition to the agri-food, tourism and consumer products sectors, the fish sector is a major beneficiary of the Menu Development Program at Japanese hotels and restaurants and at the annual Canadian Culinary Cup Competition for Japanese chefs. The fish and agri-food sectors also benefit from the Consumer Products Program investment in certain of Japan's regional fairs.

Building Awareness and Market Knowledge

The Canadian Embassy provides general and specific market intelligence and information to the Canadian industry through the *Japan Fisheries Market Report*, produced and distributed bi-monthly by the Embassy. Some specific market reports will also be prepared.

Japan is a critical market for many under-utilized species and exporters frequently seek ad hoc information on current and longer-term market trends. Tracking market shifts and anticipating demand are extremely important to the Canadian industry, and a renewed emphasis on market intelligence is expected to benefit the Canadian producers and to assist them in the long-term planning necessary for competitiveness.

Adapting Products for the Marketplace

The adaptation of Canadian seafood to Japanese cuisine is an important element of the Action Plan. Bringing Japanese chefs to Canada to assist in the development of new products and to advise processors is a priority with segments of the industry. Also highly rated by the industry are activities that feature Canadian chefs in Japan demonstrating the versatility and suitability of Canadian fish and seafood in a variety of preparations.

The Japanese market for fish and fisheries products suitable for use as materials for *sushi* is enormous. Although Canadian exports to Japan include many fish species that could be used for *sushi* (bluefin tuna, surfclam, northern shrimp, spot prawn, sea urchin roe, salmon, herring roe, Greenland halibut, and so on), these species are not well known to the wholesalers at the central markets, the *sushi* chefs and the take-out *sushi* trade. Canadian exporters will incorporate information on the quality and availability of Canadian fish species suitable for making *sushi* in presentations at seminars on the margins of the solo shows.

Promoting Products in the Marketplace

Canadian fish exporters have expressed a strong interest in the benefits of a promotional image for Canadian fish and seafood.

The primary target of a promotional image is the end-user, who, it is hoped, will "pull" products through the distribution system. In the case of Japan, the end-users would include chefs, retailers and, ultimately, 125-million individual consumers. Developing a brand image requires a substantial investment over a long period of time and is most justified in cases where there is a significant