primary end is associated with the production of surimi blocks for the manufacture of kamaboko, the raw material for the manufacture of seafood analogs, as well as canned fish. While these products are made in highly automated facilities, the custom packaging of seafood is also important. This has spawned a large number of often relatively small enterprises supplying niche markets. The preparation of food gifts for holidays is one of the most developed forms of secondary processing. At the retail level,the focus is on prepackaged fresh and cured fish portions designed for same day consumption. In the food service sector emphasis is on the production of frozen food. Frozen processed foods make up about two thirds of the total frozen food used in institutions and has been growing by 10 per cent annually since 1980. A major stimulus has come from the growth of western style restaurants which consume a high percentage of processed foods. However,the frozen food market in Japan is less developed than in Canada, and frozen foods make up only a small percentage of foods used by institutions.

Statistics:	1986	1987
Total Landings (tonnes)	12,465,000	12,847,000
Total Imports (tonnes)	2,080,000	2,414,000
Total Exports (tonnes)	729,200	730,000
Domestic Disappearance (tonnes)	13,071,800	14,531,000
" " per capita (kg)	35.8 KG	36.3 KG

COMMENTS AND OBSERVATIONS ON MARKET

General:

IMPORT MARKET SIZE (Post's estimate) Cdn$ millions	CDN SHARE (Post's estimate) Cdn$ millions	Percentage
1987: $ 2,000	$500	(4.2%)
1988: $13,459	$600	(4.2%)
1989: $14,800	$840	(5.7%)
1990: $16,000	$930	(5.8%)

MAJOR COMPETITORS (by share, post's est.): United States (17%), Korea (15%), Taiwan (14%), China (5%), Indonesia (5%), Thailand (5%).

Comments on competitors:

CURRENT STATUS OF CDN EXPORTS, POST'S ASSESSMENT: "Well established and growing."

CUMULATIVE 3-YEAR EXPORT POTENTIAL FOR CANADIAN PRODUCTS was