

wholesalers/commission merchants, HRI, and consumers; importers to large-scaled supermarkets.

ii) Any indications of changes in such patterns.

Curtailement of middle marketing channel is increasing (i.e. importers to large supermarkets). Large meat processors sometimes import by themselves.

iii) Implications for Canadian importers (new opportunities, niches).

It is expected that direct deals with meat packers/processors will increase from now on. In this case, Canadian packers could be able to meet large volume each time, which should also provide Canadian exporters with continued opportunities of consummating deals.

D. List main industry contacts:

i) Government departments, agencies, government-regulated bodies involved in beef trade.

Government departments:

- Ministry of Agriculture, Forestry and Fisheries (MAFF)
- Meat and Eggs Division, Livestock Industry Bureau (re demand/supply)
- Animal Health Division, LIB (animal quarantine stations are under the jurisdiction of this division)
- Veterinary Sanitation Division, Environmental Health Bureau (re farm chemicals residue)
- Food Sanitation Division, EHB (re food sanitation law)
- Livestock Industry Promotion Corp. (LIPC or LIPCO)
- Meat Department (re stabilization, upper and lower levels, price)