

i.e. good fishing techniques and skills, should permit economic survival.

Reply by Dobson - NZ has looked at the overall economies and finds licensing access to be more profitable. This can cause problems (US vs. NZ 1988), but they urge liberalization and acceptance of these newer types of marketing ideas.

Asian Roe Markets and their Supply Base - K. Konishi Fisheries Department, Marubeni, Japan

- 95 percent of roe market demands come from Japan - 90,000 tonnes is consumed annually - therefore will focus comments on Japan.

- Amount of supplies in Japanese market:

Herring Roe (kazunoko) - there is no domestic production. It is imported frozen and salted, mostly from Canada (41,000 tonnes) and Ireland (5,000 tonnes).

Salted Herring Roes - 16,500 tonnes from Canada, Netherlands, Korea, US and other.

Salmon Roe - domestic production is 300 tonnes. Imported/salted is 5,900 tonnes (US - 7,700, Canada - 100 tonnes, other -800 tonnes).

Ikura (eggs are separated) - domestic production - 4,500 tonnes (Hokkaido and N. Japan), imported - 400 tonnes.

Cod Roe - domestic production - 30,000 tonnes, imported frozen - 21,000 tonnes (USSR, US, Korea, Poland, Other), imported salted - 2,400 tonnes (N. Korea, S. Korea, Others).

Roe-bearing Capelin - 39,000 tonnes imported - 33,000 from Canada.

Other Roe (e.g. flying fish) - 2,400 tonnes.

Total Value = 180 billion Yen / \$1.2 billion US. (wholesale)

- Imports are 61 percent of total supply. Particular dependence is 100 percent of herring and capelin roe and 97 percent of salmon roe.

- Prices and regional consumption patterns vary considerably given supply/demand fluctuation, religions, seasons, daily staple, etc. Salted roe is considered a lucky food (due to past history - its disappearance in local waters and subsequent return as an