

Table 6**Size Distribution of Japanese Farmed Coho Salmon**

Size	Per Cent
2 kg or less	10
2 to 2.5 kg	45
2.5 to 3 kg	35
3 kg up	10

Tariffs

The import tariff on fresh and frozen farmed salmon is 5 per cent. Since the import tariff on wild salmon is approximately the same, tariffs do not discriminate against imported farmed salmon.

Recent Market Supply and Price Trends

Based on Japanese fisheries statistics for 1988 and 1989, the salmon industry has experienced an over-supply situation in Japan, characterized by substantial

price decreases. This is particularly true for farmed Coho salmon, whose Japanese production rose by over 27 per cent, from 16 500 metric tons in 1988 to 21 000 metric tons in 1989. Over the same period, Japanese producers saw their prices fall by 32 per cent, from over 900 Yen/kilo in 1988 to 601 Yen/kilo in 1989.

According to these Japanese fisheries statistics (which include farmed salmon) from January 1988 to August 1989, the quantity of all imported Pacific and Atlantic salmon increased by as much as 200 per cent, whereas the unit value of these imports fell by more than 12 per cent.

In the case of imported frozen Pacific salmon, the unit value of imports fell by almost 20 per cent. The quantity imported, however, increased by only 6 per cent, due in part to the enhanced price competitiveness of fresh Pacific salmon.

In spite of the adverse supply and price conditions, it is anticipated that Japanese farmed salmon production will continue to grow at current rates and that this production will be limited to Coho salmon.

Table 7**Imported Salmon by Volume and Value**

Species	1988		1989	
	Volume (Metric Tons)	Value (Yen million)	Volume (Metric Tons)	Value (Yen million)
Fresh Pacific and Atlantic	2 740	3 954	5 605	7 055
Frozen Pacific	74 917	82 251	79 451	69 565
Frozen Atlantic	341	421	1 134	1 071