

Discussions with members of the trade suggest there are a number of ways in which salmon consumption is likely to increase:

- i) extension of fresh salmon sales in retail supermarkets and hypermarkets;
- ii) increasing the low frequency with which consumers buy fresh salmon to a higher rate of purchase;
- iii) increased salmon consumption in the South of Germany where consumption is relatively low;
- iv) erosion of the market share of Pacific salmon as Atlantic salmon prices fall;
- v) as supplies of quality salmon increase, interest may be stimulated for frozen convenience products. The German market for frozen prepared meals has grown by over 50 percent since 1980.

Overall prospects for the expansion of salmon in Germany are good. The German market has been dominated by Norwegian salmon, with the Scottish and Irish industries not having directed significant quantities to the market. However, both countries have favourable consumer images in the Federal Republic of Germany, and will be able to compete strongly with Norway. One of the main importers and distributors in Germany, **NORDSEE**, is part of the Unilever Group which owns Marine Harvest, the main Scottish salmon farming company, which should help facilitate Scottish entry into the market. The extensive marketing activities and large supplies from Norway. Competition from farmed Pacific salmon is not seen as a threat over the longer term, given the growing preference for Atlantic salmon in the smoking sector and the poor quality image of Pacific salmon.