

Canadian exports of frozen salmon (the principal Canadian salmon export item) have declined by some 10 percent over the past five years from 391 tonnes in 1986 to 352 tonnes in 1990. In terms of species, coho continues to be the largest export item (estimated to represent almost 80 percent of Canadian exports), with sockeye, chum, pink and red king imported to a lesser extent. Canadian frozen salmon continues to be imported by the larger Belgium fish processors and smokers. The smaller smokers have switched to Norwegian salmon, partially because of the price competitiveness, but also because they can apparently order in smaller quantities on a more frequent basis.

#### BELGIUM SALMON IMPORTS

	(Kilograms)	1988	1989	1990
Live		6,300	3,000	8,000
Fresh/chilled		3,296,400	4,771,300	6,125,700
Frozen, Pacific		1,163,500	900,900	1,275,300
Frozen, Atlantic		210,300	286,200	226,300
Fillets, fresh		29,200	35,000	63,600
Fillets, frozen		34,700	90,400	95,200
Smoked		465,700	582,500	559,700

#### POST PROPOSALS

Canada has traditionally supplied the Belgium market with frozen salmon destined for the Belgium processing (as opposed to retail) sector. Canadian exports have declined in a salmon market which has grown significantly in the past few years. According to the Belgian trade, price competition and the ability of importers to import smaller than container loads of salmon from the Norwegians have influenced the decline in Canadian exports more than any other factors. Given the abundance and price competitiveness of Norwegian fresh salmon on the market, the possibilities for Canadian exporters to expand sales would seem to be limited in the general retail market. However, some individuals in the Belgium salmon trade think that there may be a niche market for Canadian wild salmon. The average Belgian consumer reportedly believes that all salmon is wild salmon, or at least does not recognize that there is a difference between farmed and wild salmon.