These basic themes reinforce the need to continue the shift away from a production based to a more market driven approach if industry is to maximize profit from its output. There is a requirement to target and adapt to different market segments (e.g.) the hotel/restaurant and institutional trade, food service or consumers at retail.

Today over 100 coastal states, both developed and developing, control 99% of the world's total marine fishery resource, whereas just over 15 years earlier it was dominated by a handful of powerful maritime countries. The structure of the world fishery has undergone many changes as more and more nations develop their marine resources. China has become a major global fish and seafood processor of value added exports and seller of raw material for further processing. The result has been a much more competitive and unstable international marketplace.

The accelerated westernization of the Russian economy allows its Fisheries Committee to set export quotas for its various enterprises to generate hard currency. All Russian enterprises in this new economic order must become self financing from either domestic or export sales. In spite of overall reduced catches by the Russians, more finfish and shellfish will be exported (i.e. salmon, haddock, cod, pollock, crab, shrimp and caviar products) providing a significant new challenge for Canadian exporters in traditional markets (eg. Japan).

In 1991, aquaculture produced 20% of the world's edible fish protein and in the year 2000 could account for 30% or more. In 1992, the farm gate value of Canadian aquacultured products was valued by the Canadian Aquaculture Producers Council as being at C$ 265 million.

The growth in worldwide consumption of seafood has and will continue as a result of recognized health benefits. The demand for food protein in the developing world will increase while at the same time those same countries will export their seafood for the generation of hard currency. In many world markets, tariffs and non-tariff barriers are not major factors that affect access. In others they are a problem and given the importance of Canadian seafood exports, access impediments in particular countries, however, have been well identified and are being pursued as a priority in the MTN as well as bilaterally.

(4) POST PLAN PRIORITIES

For FY 1993-94, forty-two Canadian Trade Offices abroad identified the fish and seafood sector as a priority for export market development and/ or plan some promotional activity. This included 17 posts in Europe, 12 in the USA, 7 in the Asia-Pacific region, 4 in Latin America and one in the Middle East.

For a number of other posts, fish and seafood was not identified as a stand-alone sector but was included as part of the Agri-food sector in terms of planned activities.