salmon have contributed to the increasing popularity of farmed salmon among Japanese consumers. Although Canada's share in this field is very limited, the importance of Canadian farmed salmon exports is expected to continue to increase.

Rapid economic growth in Japan from 1970 to 1990 has also led to significant changes in traditional eating habits. These changes have been accelerated in recent years by additional socioeconomic changes: the increase in the number of women in the workforce (women now comprise more than 41 per cent of the total), the decrease in average family size and increase in single-person households, the aging of society, and the increasing internationalization of the Japanese population.

Changes occurring in the food-services sector in Japan present opportunities to Canadian exporters. While the expense-account fine-dining days may be over (or at least in decline), the overall trend to eat out continues to grow in Japan because of changing work habits and the breakdown of the traditional Japanese family. Per capita, the Japanese spend approximately $2,000 a year in restaurants.

Much in line with North American consumers, Japanese consumers are now looking for convenience, quality and value. Two-thirds of Japanese families now own microwaves. They are eating a wider variety of foods and more ready-to-serve prepared items. They continue to demonstrate concern for the safety of food products and are showing a growing preference for "healthy" foods (lower fat and salt content).

Japanese consumer spending on high-value, processed products has increased dramatically in the past 10 years. Sales of frozen foods, especially single-portion dishes, have grown. There may be enormous potential for suppliers to the processed "convenience" foods market should Japan's per capita consumption of frozen foods (9.7 kg per year) grow to U.S. levels (more than 50 kg per year). In addition, more frozen and chilled products are being introduced specifically for microwave preparation.

Canadian Seafood Exports and Market Constraints

Canadian seafood exporters are facing their own set of problems. The overriding concern continues to be resource constraints in certain species on both coasts. These problems are compounded by changing relationships with importers, the weakened yen, increasing costs of production, and reductions in government assistance and support. Some sources have suggested that the Japanese import quota system can be an obstacle to market entry and/or growth of some species in the market; however, the Canadian Embassy has not received any documented complaints of sales lost to import quotas. Nevertheless, the quota system remains an irritant for Canadian producers.

While trade (and consumer) perceptions of Canada are generally positive, the Canadian industry is still not considered sufficiently responsive to Japanese needs in the areas of product form, price, and customer relationships. Where once Japanese seafood buyers used to make purchases on the basis of quality, they now make them on the basis of price.

Other Considerations

The Japanese fish market has been on the road to recovery after the long-lasting slowdown. However, while the depreciated