

package even though total net weight might be low. Homma Suisan would like to see more of the small to medium size roes from Canada to cover the mass consumption markets.

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The company is one of the major producers of flavoured roe with 500 tonnes production in 1987 and is associated with the Taiyo Fishery Co. Ltd., one of Japan's leading fishing companies.

The company depends on Canadian Atlantic roe for 90% of its production, which is marketed throughout Japan in frozen form. Mr. Maekawa noted that although the product is refrozen after processing there is no discernible difference in the quality of the product after defrosting. It was noted that although the market for flavoured roe is largely confined to the northern island of Hokkaido steadily increased consumption on the Japanese mainland and the southern islands of Kyushu and Shikoku is now apparent. The utilization of freezing is a major factor in expansion of distribution. Some 70% of Kaneshime Shokukin product is now shipped in frozen form.

The company also produces pressed capelin roe but due to price competition from flavoured herring roe, the market for capelin roe is said to be only about 10% of previous levels with further declines expected. The company also produces "artificial" pressed herring roe on kelp using loose Atlantic roe. The potential for this substitute for Pacific herring roe on kelp is said to be strong since the supply is relatively low. However, it was felt that Atlantic "natural" herring roe did not have the same "sticking" power as Pacific roe and would not yield the same natural product.

Mr. Maekawa noted that his company uses the larger sized whole roes during the festive/gift giving season in December. This comes principally from Grade 2 Canadian roe which is sorted and frozen for later distribution. Generally speaking the smaller immature and broken roe derived from mainly Grade 3 and 4 roes are used throughout the rest of the year.

With respect to the need for industry-wide quality standards, Mr. Maekawa expressed strong confidence in existing grade standards established between Japanese