

The import share of the fish and seafood market in Belgium represents some 80% of the total market. This fact alone should be enough to consider Belgium as a potential market for fish exports. The preference of the Belgian consumer for fresh fish is also apparent from this table, with the most popular imported types being fresh salmon and cod.

Imports of fresh salmon more than doubled in volume terms from 1988-1991, increasing from 32,964 tons to 67,817 tons. In terms of value, however, a rather large price decrease was felt, going from 34.3 million Cdn\$ in 1988 to 50.7 million Cdn\$ in 1991, or a decline from \$10.41/kilo to \$ 7.48/kilo. Shrimp and mussels, also great favourites of Belgian cuisine, showed substantial increases during the same period.

Up to 1990, canned or otherwise preserved fish witnessed a steady increase. However, growth rates are slowing down in this sector, since frozen fish is gaining rapidly on more traditional ways of fish preparations. Contributing to this phenomenon is the changing social structure of the Belgian population, with both parents working full time, and the subsequent shift towards consumption in restaurants or to frozen microwaveable dishes.

At the same time, in the last few years new fish varieties have penetrated the market with considerable success. For example, not only was monkfish quite successfully introduced, value-added fish products like surimi received a positive reaction from consumers.

MARKET PROSPECTS

With fish becoming ever more popular with the general public in Belgium, there are plenty of opportunities for Canadian exporters wishing to penetrate the Belgian market. There are, however, three areas that could provide the best prospects.

Firstly, it must be remembered that the Belgian consumer is already used to a *wide variety of fish species*. In addition to the traditional favourites such as cod, sole, shrimp, salmon and mussels, there exists extensive demand for plaice, monkfish, eel, herring, mackerel, tuna, shark, halibut, turbot, whiting, flounder, angler fish, lobster and oysters. This opens up opportunities for Canadian exporters to experiment with trade of more than just the traditional Canadian fish exports of salmon or lobsters. The introduction of the Canadian mussel, for example, is already a major step taken into that direction.

A second market is that of the *value-added fish products*. The introduction of surimi with the taste of lobster has been a major success with the Belgian consumer. Similar products, such as surimi with the taste of another fish like salmon or smoked salmon, could prove to be equally successful, but are still almost impossible to find for Belgian importers. Canada, with its varied fish resources, could therefore play a leading role in this market, simply by approaching it in an inventive way.

Finally, there is the market of *prepared seafood dishes* in the frozen seafood section. Up until now, this market has been divided between three major competitors, offering only a limited range of seafood products. Canadian exporters are definitely in a position to achieve a major market share if they try for a recognizable and less traditional seafood product for every day consumption.