

## BELGIUM

### SUPPLY AND CONSUMPTION

The consumption of seafood in Belgium has shown a positive growth trend (both in volume and value terms) over the last five years, is expected to continue throughout the 1990's. Gross per capita consumption of fish in Belgium is 16.3 kilograms per capita. However, as the figure includes industrial usage (including animal feed), a more accurate estimate of actual consumption is 8.5 kilograms per capita. Not only has consumption of traditional fish and seafood products increased (eg. for round fish such as herring and cod by 13 percent over the last five years; for flat fish 8 by percent; and for canned fish by 15 percent), but consumption of seafood products formerly considered luxury items (smoked salmon, lobsters, crab) has shown dynamic growth. Consumption of smoked salmon increased by 28.4 percent annually between 1987 and 1990. Surveys have shown that consumption is moving towards prepared seafood dishes and frozen easy-to-prepare seafood items.

Belgium is highly reliant on imports of all seafood products. Domestic supply accounts for 35 percent of Belgium's fish and 5 percent of the country's shellfish requirements. The main suppliers of seafood to Belgium are the Netherlands, Denmark and France, with Canadian seafood exports increasing steadily over the last five years. Belgium imports for domestic consumption as well as for processing and export.

Precise statistics on salmon consumption are not available for Belgium, but trade numbers provide an overall basis for analysis. Total imports of salmon products into Belgium increased by 60 percent between 1988 and 1990; fresh and chilled salmon imports to Belgium increased by 86 percent in the same period; frozen salmon imports increased by 8 percent; and smoked salmon imports increased by 20 percent. Consumption of smoked salmon products has grown significantly over recent years in Belgium: an increase of 34.2 percent in 1987; 23.5 percent increase in 1988;; 33.3 percent in 1989; and an increase of 22.6 percent in 1990. In 1990, per capita consumption of smoked salmon was 103 grams, with an average price of BF1175 per kilogram.

The Belgium consumer purchases mainly fresh and smoked salmon products on a regular basis. Most of the frozen salmon imported into Belgium is used for smoking purposes. Given the price advantage and transportation considerations of Norwegian farmed salmon, some Belgium smokers have switched entirely to imported fresh salmon. Canadian frozen Pacific salmon competes directly with American products in the Belgium market. The United States also exports frozen Atlantic salmon, although the bulk of imports in this category come from Norway. The United Kingdom and Denmark are major suppliers of smoked salmon, while Norway, Denmark and the United Kingdom are the major suppliers of fresh salmon.