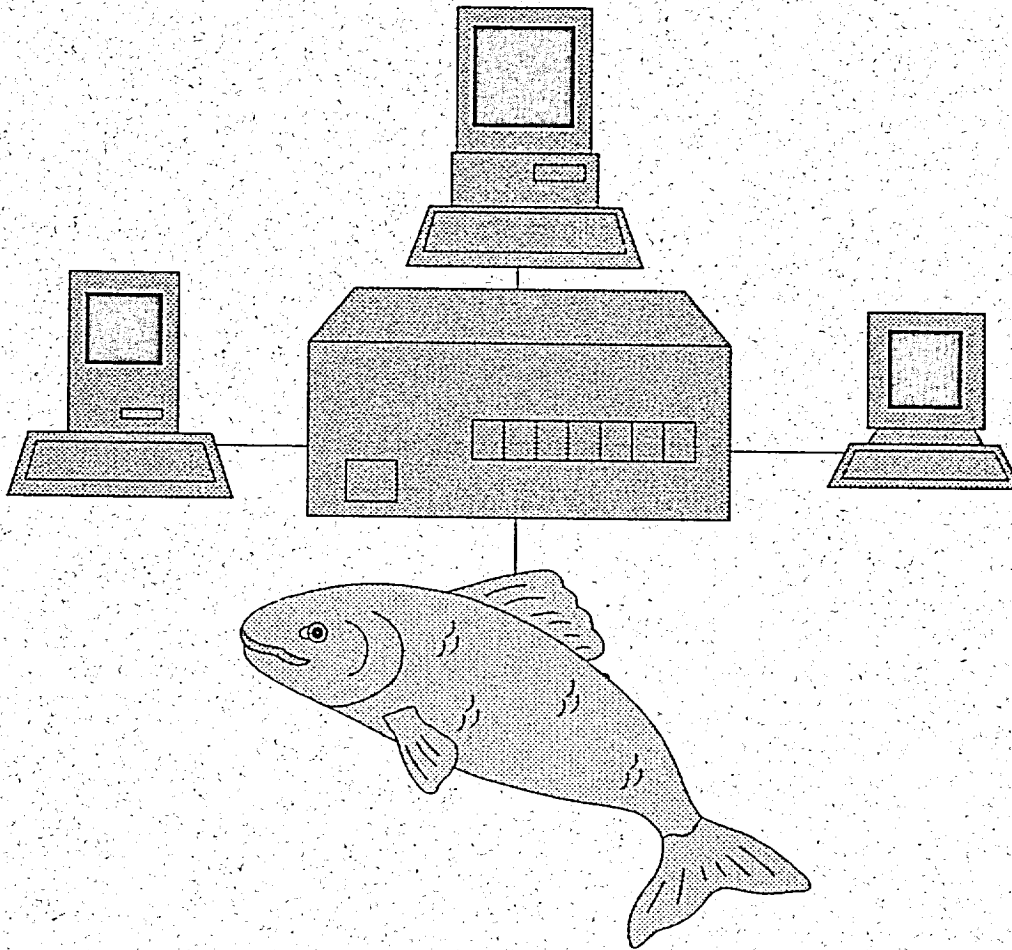


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**WORLD SALMON
MARKETING SURVEY
ÉTUDE MONDIALE SUR LA MISE
EN MARCHÉ DU SAUMON**

External Affairs and
International Trade Canada

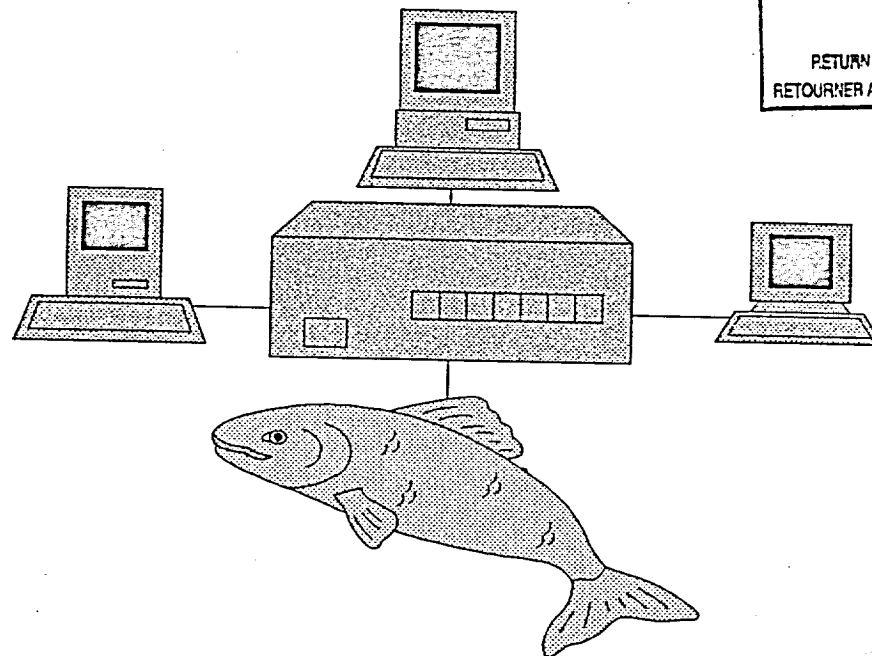
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Min. des Affaires extérieures

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WORLD SALMON MARKETING SURVEY ÉTUDE MONDIALE SUR LA MISE EN MARCHÉ DU SAUMON

Prepared for/Préparé pour
External Affairs and International Trade Canada/Affaires
extérieures et commerce extérieur Canada

by/par

Gary G. Smith

INFI-GAR Economic Services

Edited by/Édité par: W.P. Molson

Agri-Food, Fisheries and Resources Division/Direction
de l'agro-alimentaire, des pêcheries et des ressources

International Marketing Bureau/Direction
générale du marketing international

125 Sussex Drive/promenade

Ottawa, Ontario K1A 0G2

Tel:(613) 995-1712

Fax:(613) 943-1103

April/Avril 1992

43-268-248

ABSTRACT

The *WORLD SALMON MARKETING SURVEY* provides market assessments from Canadian Trade Commissioners and Commercial Officers at 35 Canadian Trade Offices abroad. The Survey is organized geographically by countries, and regionally in terms of the territory covered by our posts in the United States. The profiles include information on factors relating to the marketing of salmon such as: supply and consumption; distribution channels; tariffs; phytosanitary regulations; local business practices; recent market developments and trends; as well as suggestions on how Canadian export performance might be improved.

Lists of Canadian Trade Offices abroad, International Trade Centres located across Canada, together with the Geographic Trade Divisions within the Department and their geographic responsibilities are appended.

RÉSUMÉ

L'ÉTUDE MONDIALE SUR LA MISE EN MARCHÉ DU SAUMON comporte des évaluations de marchés provenant des délégués commerciaux du Canada et des agents commerciaux de 35 bureaux canadiens du commerce à l'étranger. L'Étude est structurée géographiquement par pays, mais aussi par région pour le territoire desservi par nos missions aux États-Unis. Les profils présentés incluent des renseignements concernant les facteurs qui ont une influence sur la commercialisation du saumon, tels les suivants : offre et consommation, circuits de distribution, droits de douane, règlements phytosanitaires, pratiques commerciales locales, évolution et tendances récentes du marché. Ils sont complétés par des suggestions sur les façons d'améliorer la tenue des exportations canadiennes.

On trouvera à la fin de l'Étude la liste des bureaux canadiens du commerce à l'étranger, des centres internationaux du commerce situés d'un bout à l'autre du Canada, de même que des directions commerciales géographiques du Ministère, avec une description de leurs responsabilités géographiques.

INTRODUCTION

The *World Salmon Marketing Survey* was developed in response to problems facing salmon exporters as identified by Canadian industry and communicated to External Affairs and International Trade Canada (EAITC). The information contained in the document is intended to act as a catalyst in fostering a concerted dialogue between government and industry to generate a more coordinated Canadian approach to the international marketing of Canadian salmon and salmon products. It is also envisaged that the Survey may be a useful vehicle for facilitating the development and implementation of a focused export marketing strategy for the Canadian salmon industry. In turn, this will serve as an invaluable contribution to the Department's annual post planning process where priorities are established and specific activities are identified to be undertaken both in Headquarters and in our domestic and foreign trade offices.

Canadian exporters are under increasing pressure to shift the emphasis of their approaches from the somewhat traditional allocation of products to buyers to the active marketing of Canadian salmon. If they wish to maintain or improve their export performance, Canadian exporters will need to address various factors affecting both demand and dictating promotional activities or initiatives (e.g. new product development).

Canadian exporters are facing increasing competition from other salmon suppliers in countries such as Norway, Chile, Scotland and USA (Alaska). Larger harvests of certain wild salmon species, together with the availability of greater volumes of farmed salmon on a year-round basis, have not only placed downward pressure on prices but have also altered market dynamics dramatically. Suppliers in some other producing countries benefit from substantial government support measures and expanded levels of resources available to promote their salmon exports. These factors, to cite only a few, point to the need for stepped-up Canadian international salmon marketing efforts, within the framework of our capabilities.

Salmon is one of two species (the other being lobster) identified by industry where export marketing activities could benefit from generic promotion. The *World Salmon Marketing Survey* confirms salmon as a species with considerable potential for increased consumption in a number of markets. It is based on the contributions of Trade Commissioners and Commercial Officers at Canadian Trade Offices abroad. The Survey contains information on countries or regional markets and is the largest survey of world markets for salmon ever undertaken by the Canadian Trade Commissioner Service.

INTRODUCTION

L'*Étude mondiale sur la mise en marché du saumon* a vu le jour en réponse aux problèmes auxquels se heurtent les exportateurs de saumon et qui ont été mis en évidence par l'industrie canadienne avant d'être communiqués à Affaires extérieures et Commerce extérieur Canada (AECEC). L'information que contient le présent document vise à favoriser la concertation entre le gouvernement et l'industrie afin d'en arriver à mieux coordonner la façon d'aborder au Canada la commercialisation internationale du saumon et des produits du saumon canadiens. On pense également que l'*Étude* pourrait être un instrument utile pour faciliter l'élaboration et la mise en oeuvre d'une stratégie focalisée de commercialisation des exportations au profit de l'industrie canadienne du saumon. Par ailleurs, ces données seront d'un apport précieux pour la planification annuelle des missions, dans le cadre de laquelle nous fixons les priorités et précisons les activités particulières à entreprendre tant à l'administration centrale que dans les bureaux du commerce situés au pays et à l'étranger.

Les exportateurs canadiens sont de plus en plus soumis à des pressions les incitant à modifier leurs méthodes, axées jusqu'ici sur une répartition quelque peu traditionnelle des produits aux acheteurs, à la mise en marché active du saumon canadien. Afin de préserver ou améliorer la tenue de leurs exportations, les exportateurs canadiens doivent tenir compte des facteurs qui touchent la demande et imposent des activités ou des initiatives de promotion (ex. mise au point de nouveaux produits).

Les exportateurs canadiens subissent de plus en plus une concurrence de la part d'autres fournisseurs de saumon provenant de pays comme la Norvège, le Chili, l'Écosse et les États-Unis (Alaska). Des prises plus importantes de certaines espèces de saumons sauvages, de même qu'une offre plus abondante de saumons d'élevage pendant toute l'année, ont non seulement exercé des pressions à la baisse sur les prix mais ont également modifié en profondeur la dynamique du marché. Les fournisseurs de certains autres pays producteurs bénéficient d'une aide gouvernementale considérable et de ressources accrues aux fins de la promotion de leurs exportations de saumon. Ces facteurs, pour ne citer que ceux-là, témoignent de la nécessité de multiplier les efforts canadiens de commercialisation du saumon à l'échelle internationale, dans les limites de nos capacités.

Le saumon figure parmi les deux espèces (l'autre étant le homard) pour lesquelles, selon l'industrie, les activités de commercialisation des exportations pourraient bénéficier d'une publicité générique. L'*Étude mondiale sur la mise en marché du saumon* confirme que le saumon est une espèce dont la consommation offre un potentiel considérable d'accroissement sur plusieurs marchés. Cette étude est fondée sur la collaboration des délégués commerciaux et des agents commerciaux des bureaux canadiens du commerce à l'étranger. Elle comprend de l'information sur les divers pays ou marchés régionaux et constitue la plus grande enquête sur les marchés mondiaux jamais entreprise par le Service des délégués commerciaux du Canada.

Pour tenir compte des ressources limitées dont disposent les exportateurs canadiens de saumon, on s'est attaché dans l'*Étude* à mettre en évidence les occasions et les défis qui se présentent à l'étranger dans le but d'aider à mieux focaliser les activités de commercialisation du saumon canadien. L'*Étude* fournit des données sur le marché de la plupart des grands pays importateurs de saumon, ainsi que sur d'autres marchés offrant un potentiel intéressant pour les exportateurs canadiens de saumon. Les pays où les perspectives de vente ont été jugées limitées ou négligeables (ex. Norvège, Chili, une grande partie de

Recognizing the limited resources available to Canadian salmon exporters, the Survey was directed towards the identification of opportunities and challenges abroad in an attempt to help focus Canadian salmon marketing activities. It provides market-specific information for most major salmon importing countries, and other markets with good potential for Canadian salmon exporters. Those countries, where prospects for Canadian sales were considered to be more limited or negligible (e.g. Norway, Chile and much of Latin America and Africa), have been excluded. Information contained in the Survey is intended for use by individual firms, associations or consortia to develop and plan marketing initiatives for salmon products worldwide. The Survey should help in identifying priority export markets and in targeting the distribution of promotional materials to foreign audiences.

Canadian Trade Offices are well positioned to assist Canadian exporters and coordinate export promotion activities in markets of interest, in concert with Canadian industry. Canadian salmon exporters are encouraged to contact individual Trade Offices for information or guidance on commercial practices in individual countries or regional markets.

As also noted above, this Survey is intended to act as a vehicle for dialogue, not the end, but more the beginning of a process. Included with the Survey is a **SALMON MARKETING CHECKLIST** which individual firms, associations and others interested in enhancing the export performance of the Canadian salmon industry are encouraged to complete and return in the self addressed envelope provided. Completion of the checklist represents an opportunity to contribute to the basic information base by signalling particular interests and perspectives which will be factored into the development of export marketing strategies for salmon and salmon products. Responses will be tabulated and the aggregated data shared with industry, the Provinces and all Canadian trade offices.

We would be interested in any comments you may have concerning the Survey or the enclosed Checklist. We can be contacted by writing to the Agri-Food, Fisheries and Resources Division, External Affairs and International Trade Canada, 125 Sussex Drive, Ottawa, Ontario, K1A 0G2, by fax at (613) 943-1103 or by telephone at (613) 995-1712.

Richard Ablett
Director
Agri-Food, Fisheries and Resources Division
International Marketing Bureau

l'Amérique du Sud et de l'Afrique) ont été exclus. L'information que contient l'Étude est destinée aux entreprises, aux associations et aux consortiums, qui pourront s'en servir afin de mettre et point et de planifier des initiatives de commercialisation des produits du saumon à l'échelle mondiale. L'Étude devrait aider à identifier les marchés d'exportation prioritaires et à mieux cibler la distribution du matériel publicitaire à l'intention des auditoires étrangers.

Les bureaux canadiens du commerce sont bien placés pour aider les exportateurs canadiens et coordonner les activités de promotion des exportations sur les marchés convoités, de concert avec l'industrie canadienne. Les exportateurs canadiens de saumon sont invités à communiquer avec les bureaux du commerce individuels pour obtenir de l'information ou des conseils concernant les pratiques commerciales qui ont cours dans les divers pays ou sur les marchés régionaux.

Comme on l'a vu plus haut, l'Étude vise à stimuler le dialogue, à marquer le point de départ d'un processus plutôt que son aboutissement. L'Étude s'accompagne d'une liste de contrôle intitulée Points d'information sur la mise en marché du saumon; les entreprises, les associations et les autres parties Intéressées par la tenue des exportations de l'industrie canadienne du saumon sont encouragées à en cocher les cases qui les concernent et à nous la retourner dans l'enveloppe pré-adressée fournie à cette fin. Elles contribueront ainsi à l'enrichissement de la base de données, en signalant des intérêts et des points de vue particuliers dont il sera tenu compte dans l'élaboration des stratégies de commercialisation des exportations de saumon et de produits du saumon. Les réponses seront dépouillées et les données globales seront communiquées à l'industrie, au provinces et à tous les bureaux canadiens du commerce.

Nous vous serions reconnaissants de nous faire parvenir vos commentaires sur l'Étude ou la liste de contrôle qui l'accompagne. Vous pouvez communiquer avec nous en écrivant à la Direction de l'agro-alimentaire, des pêches et des ressources, Affaires extérieures et Commerce extérieur Canada, 125, promenade Sussex, Ottawa (Ontario), K1A 0G2. Vous pouvez également nous joindre par télécopieur au (613) 943-1103 ou par téléphone au (613) 995-1712.

Richard Ablett
Le directeur,
Direction de l'agro-alimentaire, des pêcheries et des ressources
Direction générale du marketing international

OBSERVATIONS

Information received from our posts confirms that there are significant opportunities for Canadian salmon exporters in many foreign markets. It is also evident that if we are to exploit these opportunities, more attention needs to be given to the particular demands and characteristics of specific markets. We must therefore become more market driven in our approaches. In addition to building on Canadian strengths such as quality of product, there are messages and suggestions from our posts which we believe merit consideration. Identified below, by way of example only, are a number of observations:-

CONSUMER AWARENESS - Consumers in certain Asian markets are not readily aware of salmon as a species. In addition, salmon is considered a luxury item by most Asian consumers and is perceived to be very expensive.

SEASONAL CONSUMPTION - A considerable increase in consumption of salmon during the Christmas and Easter holiday periods is the norm in many European markets. Promotional efforts could be targeted to these two holiday seasons.

SHIPMENT SIZE -The size of many salmon smokers is relatively small in certain countries. In certain markets small smoking operations have switched suppliers to foreign salmon exporters who can provide less-than container loads (LTL).

CANADIAN IMAGE - Many posts advised that Canadian salmon products do not have a distinctive image in their markets. Future marketing efforts should attempt to present a uniquely Canadian image based on high quality and consistency of supply. Initiatives such as gill-tags, clearly marked Canadian shipping boxes, or some other uniquely Canadian symbols can help develop industry recognition.

FOOD SERVICE MARKET SEGMENT -The most consistent outlet for high quality salmon worldwide is the hotel/restaurant sector - a sector which largely caters to the tourist trade. Future salmon marketing efforts should include seminars and presentations aimed at the chefs/cooks employed in the hotel/restaurant sectors. More generally, efforts should be made to target particularly those sectors of the industry which have the scope for increasing Canadian market share.

PROMOTIONAL MATERIALS - Numerous Canadian Trade Offices indicated the need for better promotional materials to help increase Canadian market share. Salmon exporters should develop a continuous and diverse supply of promotional items to be used by the trade, government, and other salmon representatives in such forms as posters, brochures, pins, badges, educational documentation or recipe cards.

OBSERVATIONS

L'information envoyée par nos missions confirme qu'il existe des perspectives intéressantes de vente pour les exportateurs canadiens de saumon sur de nombreux marchés étrangers. Or, pour tirer profit de ces perspectives, il est évident que nous devons accorder une plus grande attention aux exigences et caractéristiques particulières de ces marchés. Nos stratégies doivent donc être davantage axées sur la clientèle. En plus de miser sur les points forts du Canada, comme la qualité du produit, nous aurions intérêt à tenir compte des messages et des suggestions que nous communiquent nos missions. À cet égard, et à titre illustratif uniquement, voici un certain nombre d'observations utiles :

SENSIBILISATION DES CONSOMMATEURS - Les consommateurs sur certains marchés asiatiques ne sont pas vraiment conscients du fait que le saumon est une espèce bien précise. En outre, le saumon est considéré comme un article de luxe par la plupart des consommateurs asiatiques, qui s'imaginent donc qu'il est hors de prix.

CONSOMMATION SAISONNIÈRE - On assiste traditionnellement à une augmentation considérable de la consommation de saumon pendant les fêtes de Noël et de Pâques sur de nombreux marchés européens. Les initiatives de promotion pourraient s'articuler en fonction de ces deux périodes.

TAILLE DES ENVOIS - La taille de bien des entreprises de fumage du saumon demeure relativement modeste dans certains pays. Sur certains marchés, par conséquent, les petites entreprises de fumage se sont tournées vers les exportateurs étrangers de saumon qui pouvaient leur livrer des conteneurs incomplets.

IMAGE DU CANADA - Nombre de nos missions ont signalé que les produits du saumon du Canada ne jouissent pas d'une image distincte sur leurs marchés. Il conviendrait donc que les activités de commercialisation dans l'avenir présentent une image originale du Canada fondée sur la qualité et la régularité de l'approvisionnement. Le recours à des étiquettes de branchie, à des boîtes d'emballage de produit nettement identifié comme canadien ou à d'autres symboles particuliers au Canada pourrait aider à promouvoir l'industrie canadienne.

SEGMENT DES SERVICES ALIMENTAIRES - Le débouché le plus sûr à l'échelle internationale pour le saumon de première qualité est encore le secteur des hôtels et des restaurants - au service surtout de l'industrie touristique. Les efforts de commercialisation du saumon, à l'avenir, devraient inclure des séminaires à l'intention des chefs et des cuisiniers du secteur hôtelier et de la restauration. Plus généralement, il conviendrait que ces activités visent expressément les sous-secteurs de l'industrie susceptibles d'accroître la part canadienne du marché.

MATÉRIEL PUBLICITAIRE - Bon nombre des bureaux du commerce du Canada ont signalé l'opportunité de disposer d'un meilleur matériel publicitaire pour aider à accroître la part canadienne du marché. Il importerait que les exportateurs de saumon assurent un approvisionnement continu et divers d'articles publicitaires à utiliser par l'industrie, les pouvoirs publics et d'autres parties intéressées par le saumon, sous forme d'affiches, de brochures, d'épinglettes, de documents d'information et de fiches de recettes.

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UNITED STATES
OF AMERICA

ATLANTA

SUPPLY AND CONSUMPTION

The post territory has a population of 43 million people and covers North Carolina, South Carolina, Tennessee, Mississippi, Alabama, Georgia, Florida, Puerto Rico and the U.S. Virgin Islands. Many of these states also enjoy a lively tourism industry which augments considerably the population base. Florida alone, with a population of 13 million people expects an influx of 40 million visitors this year. Foodservices industry sales of \$10.5 billion were anticipated in 1991.

The population in Atlanta is generally affluent as well as discriminating. Traditionally, fish has been (in one form or another) a favourite protein. In addition to local consumption, there are also trading companies within the post territory that purchase for and trade with South and Central America and the Caribbean. In common with the rest of the American market, the growth in consumption of fish in the Southeastern United States has slowed somewhat this past year, but remains a very attractive market.

Although difficult to quantify, informed sources have told the post in Atlanta that salmon consumption has shown a marked upturn within the last 1-2 years. Salmon from Alaska has been seen in retail stores throughout the territory at incredibly low loss-leader prices. While the quality is not as good as Canadian salmon, it has had the effect of increasing the awareness of salmon among the general shopping public.

Canadian salmon has always had to compete with the frontrunner--Norway. However, due to the recent ruling by the International trade Commission, Canadian companies now have an opportunity to get a good and lasting hold on the market. Chile has a product which is perceived as having good quality for the price, and is much cheaper than the Canadian Atlantic salmon. However, it is also perceived as not having a consistent level of quality, and the delivery times are perceived as slow, the shelf life (a very important consideration) is thought to be short. Nevertheless, Chile is doing a good job of fostering a favourable image of this commodity product in the minds of the buyers by an expert use of advertising in the trade media.

Contacts in the trade in the post territory are reporting renewed efforts to capture more of the Southeastern United States market by consortia from Scotland. One marketing group is rumoured to have spent over a million dollars to position themselves in the greater Atlanta metro area, and sources indicate that they are going to repeat this again next year.

MARKETING

An often stated detriment to marketing Canadian salmon (or any other Canadian species for that matter) is the lack of a clear national image. Neither foodservices nor retail have a reason to buy Canadian product or to advertise the product they sell as Canadian. To succeed, any promotion of Canadian salmon should be accompanied by hard-hitting generic advertising campaigns. It is the opinion of the Consulate General--Atlanta that for the foreseeable future it may prove to be impossible for Canadian producers to compete with product coming from low wage areas (Chile) where producers may enjoy preferential government treatment. The post in Atlanta believes indications in the marketplace point to these producers capturing a good share of the market on the basis of good quality at lower prices. Against this background, the post suggests steps Canadian companies (or consortia) can do to hold on to or even expand their markets.

1. Advertise in selected trade publications to firm up the popular perception that Canada still has as the best product, with the longest shelf life as well as available product throughout the year.
2. Promote the image of a safe and always secure and stable supplier.
3. Develop and join a trade association that has stringent quality control standards. An example of this might be the Vinnars Quality Alliance, an organization started by the wine producers of Ontario. Every bottle of wine from the membership of this Association is now shipped with a VQA sticker.
4. Hire local representatives who will call on distributors and end users, and who will also take an active part in trade shows and other promotional events.
5. Develop marketing incentives that will help agents and/or distributors promote product to retail and foodservices customers, i.e. cash incentives, free product based on sales, merchandising aids, etc.
6. Develop a well designed gill clip with a distinctive company logo.
7. Design a mouth tag (perhaps modeled after the one provided by the Province of New Brunswick) which will accommodate the hand of a salmon processor. The tag is seen by salmon processors as an easy way to handle the fish so that it will not be damaged thereby reducing loss while processing.
8. Design distinctive shipping boxes that feature the logo of the company and/or an association and that will have the quantity the size clearly visible from a distance.
9. Develop presentations specifically aimed at visiting buyers, including pictures of the operations, lists of representatives, marketing plans, products size and availability charts etc.

POST PROPOSALS

The Consulate General--Atlanta has undertaken several activities that have proven highly successful. These include two incoming missions to visit Canadian salmon farmers, several scheduled trade shows, and visits by post personnel to distributors in the territory to promote Canadian product. The post plans to continue these types of activities over the next year. A further two incoming missions, one to Atlantic Canada and the other to Western Canada are planned. A solo show directed to the foodservices industry in South Florida and other trade shows in the territory should provide Canadian producers with additional opportunities for promotion of their product directly to the Southeastern United States.

BOSTON

SUPPLY AND CONSUMPTION

The market for salmon in New England is somewhat limited at the beginning of 1992, largely because demand is off and prices are low. Local seafood industry contacts are surprised demand is so low when prices are around \$2.85 US for 4-6 pound, and \$3.10-3.15 US for 6-9 pound. Demand was expected to increase over the holiday season, but the market did not respond to the forecast trends. Chilean salmon exporters have been selling at the above noted prices, Canadian producers generally have not, and thus Chile holds the majority of New England market share. Local buyers and distributors have had difficulty understanding a Canadian reluctance to compete with Chilean product especially considering the large discrepancies in freight charges. Norway is only shipping smoked salmon sides into the New England market because of the anti-dumping duties. Markets for smoked sides tend to be smaller usually 300-400 pounds per order.

POST PROPOSALS

The Post believes that British Columbia kings should present the best future marketing opportunities for Canadian products in the New England market. To improve overall market share, Canadian salmon producers should continue to emphasize to U.S. buyers and distributors of the superior quality of Canadian salmon due to the rigid inspection systems and quality controls. A distinctive marketing advantage for Canadian exporters is overnight trucking from Atlantic Canada for all New England destined products.

CHICAGO

SUPPLY AND CONSUMPTION

The Chicago market represents a per capita seafood consumption of 16.6 pounds of fresh fish per year, compared to 15.9 pounds nationally. Chicago's market area provides excellent opportunities for Canadian salmon producers. The major concerns for Canadian exporters should be competitive pricing and exports from Norway and the United Kingdom who export their product directly to the Chicago market.

POST PROPOSALS

Commercial Officers at the Consulate General consistently indicate good opportunities exist for Canadian seafood exporters in the Chicago market area, even though the Canadian industry has not mounted a cohesive and coordinated promotional initiative in the market. Canadian salmon exporters must increase representation in the market through aggressive marketing efforts and promotional activities. The post has identified fresh/chilled Atlantic salmon as having specific opportunities. Listed below are importers in the Chicago area and the specific products they are interested in purchasing.

CHICAGO FISH HOUSE

1250 West Division
Chicago, Illinois 60622
Contact: Mike Sullivan, Fresh Buyer
Tel:(312) 227-7000

DICK LUKIN INCORPORATED

540 Frontage Road
Northfield, Illinois 60093
Contact: Dick Lukin, President
Tel:(708) 441-8885

GOLDEN OCEAN SEAFOOD INC.

2701 South Wells
Chicago, Illinois 60616
Contact: Van Giragosian
Tel:(312) 791-0202
Products: frozen salmon only

ROYAL ENTERPRISES INC.

2222 West Lake Street
Chicago, Illinois 60612
Tel:(312) 226-5944

L. ISAACSON & STEIN FISH CO., INC.

800 West Fulton Market
Chicago, Illinois 60607
Contact: Sherwin Willner/Neil Rabin
Tel:(312) 421-2444
Products: farmed Atlantic only

OCEAN FOODS COMPANY

2120 South Canal Street
Chicago, Illinois 60616
Contact: Robert T. Fagan, Vice Pres.
Tel:(312) 225-5213
Products: wild and farmed

PICK FISHERIES INCORPORATED

702 West Fulton Street
Chicago, Illinois 60606
Contact: Manuel Rodrigo, Buyer
Tel:(312) 226-4700
Products: wild and farmed

CLEVELAND

SUPPLY AND CONSUMPTION

The post territory includes the states of Ohio, Kentucky, West Virginia and Western Pennsylvania and represents a population of 20 million. Present market for seafood consumption has increased by 25 percent from 1989, due to accessibility and marketing of seafood as a healthier alternative to red meat. Salmon is rated high among the top three seafood choices along with yellowfin tuna and swordfish, according to local seafood wholesalers. Salmon is preferred based on texture, flavour and flexibility of preparation, with varieties of choice being coho, North Atlantic and Pacific salmon.

Approximately 95 percent of the salmon sold is from Atlantic Canada, and occasionally Chilean or Pacific is purchased mainly during the summer months. Local wholesalers find that Atlantic Canadian salmon is more accessible, Canadian companies are more responsive to orders, the overall quality is high, and seafood processors from Atlantic Canada are well known in the territory.

Commercial officers interviewed 12 wholesalers and brokers in northeast Ohio who sell to grocers, restaurants and foodservices operations. These wholesalers buy and sell by price, seasonal preferences, and consistency of quality and size. For example, more Pacific salmon is sold in the summer months because it is more plentiful and less expensive than other salmon varieties. In general, wholesalers in northeast Ohio report moving 3,000-5,000 pounds weekly, with sales higher (up to 10,000 pounds) in the summer months due to lighter eating habits and the ability to grill fish outdoors. The Consulate Trade Office in Pittsburgh reports that wholesalers are moving approximately 2,000-3,000 pounds per week, and the Trade Office in Cincinnati reports an average of 3,000-4,000 pounds per week. Depending on price and available quantities, wholesalers are either sourcing direct with product drop-shipped, or buying through distributors in Boston. For example, the National Wholesale Grocery Company, First National Supermarkets, Incorporated, with corporate headquarters in Cleveland, sell an average of 10,000-15,000 pounds weekly. The company buys through a local wholesaler, State Fish, who sources the product in Boston. First National also employs a private seafood consultant in Toronto who works with the firm's Federal inspector in Boston. The post has been working with the seafood buyer at First National who has expressed some interest in purchasing Pacific salmon from a firm in British Columbia.

HEALTH REGULATIONS

No new health regulations apply, other than a soon to be implemented Food and Drug Administration voluntary nutritional labelling for seafood products which will more than likely boost salmon consumption due to high nutritional value.

POST PROPOSALS

All of the wholesalers interviewed in Cleveland territory can be expected to continue to import salmon and other seafood products from Canada. They would like marketing support from Canadian seafood processors to help sell salmon as well as other Canadian seafood products. The post recommends Canadian seafood exporter directories; brochures with landed price lists; product information which elaborates on Canada's cool clean waters and high quality standards; and point of sale material such as promotional items, posters, etc. The post further recommends that Canadian companies make direct in person sales calls or communicate with the market by telephone or fax on a regular basis. In addition, it is also suggested that firms ship samples of salmon and product information.

The post would be pleased to organize a seafood show for regional buyers, following the Boston Seafood Show as a means to follow up leads for companies. The local market has expressed an interest in attending such an event. In September 27-29, 1991, the post participated in the Ohio Grocers Association Convention and Trade Show with a Canadian pavilion of 28 companies, 6 of whom exhibited seafood products. A Canadian seafood reception featuring Atlantic and Pacific salmon, lobster, mussels and oysters was held at the show attended by 650 grocery industry buyers. A sourcing workshop featuring a Canadian breakfast was also held during the show and featured a speaker from CALPA and a representative from CAFE. Canadian exhibitors reported that good contacts and reliable leads were made as a result of this workshop and on the exhibit floor. The Show sponsored by the Ohio Grocers Association is now the second largest regional grocery event in the U.S. and attracts key buyers from two national chains and large multi-divisional wholesale food companies, brokers, and independent retailers.

DALLAS

POST PROPOSALS

Dallas/Fort Worth (4 million) is one of the fastest growing metropolises in the United States. Canadian personnel in Dallas helped Taste of Canada coordinate a seafood promotion in Dallas/Fort Worth *Tom Thumb* stores during February 27--March 12, 1991. The post organized two receptions which were held at the Fairmont Hotel, the Sunday reception targeted the foodservices trade and media, and the Tuesday reception honoured *Tom Thumb* personnel. The promotion included fresh seafood with some frozen fish and fresh salmon chosen as the feature product. Taste of Canada reported salmon as the best received product of the promotion. "The distributor advises that the 37,000 pounds sold during the two-week promotion was four times the quantity which *Tom Thumb* would normally sell in a two-week period.

In the *Report on Taste of Canada Seafood Promotion*, many of the demo reports and observed consumer reactions were listed, and are highlighted below.

- A. **Product Attributes**
 - salmon tastes so good
 - I buy salmon often, and I like to barbecue it
 - people from up north seem to know and like salmon the best
 - feature price is a good idea
- B. **Recipes and Salmon POS**
 - Magic Rule is excellent
 - recipes should specify temperature for cooking
- C. **Demonstration Process**
 - I liked the explanations given by the demo ladies
 - I would have preferred to sample the product
 - we would have sold more product if it had been sampled
- D. **Consumer Trips**
 - a trip is a good selling feature
 - the trip helped to draw customers
 - I would love to visit Canada

In addition, the *Tom Thumb* management commented as follows:

- Canadian quality is very good, perhaps surprisingly so, and they would be pleased to use Canadian products again.
- The support provided by the advertisement, the POS, and the demonstrations helped sell much more fish than usual.
- They would be happy to run another Taste of Canada promotion.

The report also stated the reactions of *Seafood Supply Company*, the sole supplier to *Tom Thumb* stores, and are listed below.

A. Products

- Canadian quality is excellent in all product lines supplied.
- As far as salmon is concerned, the chef's creations at the receptions have finally proved that Canadian salmon is as good as any alternative. Paul Clark said "You have destroyed the Norwegian myth".

B. Market Development

- Spin-off from the retail promotion into the foodservices sector is already evident: Hyatt Hotels in Dallas have agreed to switch to Canadian product; Fairmont Hotels nationwide have indicated a willingness to switch.

C. Promotion

- Enthusiastic about all aspects and its positive effects on their company.
- Feels media coverage could have been more complete.
- Looks forward to participating in another *Taste of Canada* promotion.

Initiatives for salmon products in the Dallas/Fort Worth area can build on the valuable information highlighted from the promotion held last Spring. The Canadian Trade Commissioner Service offers a matrix of services and marketing assistance in planning and executing salmon promotional endeavours. The above referenced report provided four main conclusions drawn from the promotion. The conclusions offer important marketing considerations for any future salmon marketing promotions.

- A. Dallas appears to be a high growth potential market for Canadian salmon; the ability to increase consumption four-fold during a two-week promotion suggests low penetration with excellent upside opportunities.
- B. With respect to other species, sales were encouraging in drawing attention to Canadian products, but less dramatically than the salmon.
- C. Convincing Dallas consumers to purchase Canadian seafood has just begun; the door is more open than before, but it will require continued efforts to keep it open. Retailers and consumers have short memories and need frequent reinforcement to continue a high level of interest.
- D. Some may think the Norwegian myth has been destroyed in Dallas. More likely, it has only been sent into remission, and will need ongoing effort to keep it in its place.

DETROIT

SUPPLY AND CONSUMPTION

The Michigan/Indiana market area offers Canadian suppliers opportunities to market salmon products, although continued market penetration will be difficult as Canada now controls an estimated 50 percent market share. Salmon consumption in the market area is estimated to be approximately 1 million pounds per year. The majority of the volume, or approximately 60 percent, is marketed in fresh form with the balance sold as frozen.

Traditionally, salmon is positioned as an up-scale menu item compared to cod or haddock (used in fish and chip combinations) which are consumed in abundance by the predominantly blue-collar populace. Salmon has not represented a good alternative to these other species. Nonetheless, salmon is available in fresh fillet or steak format in most retail fish counters, as well as with fish wholesalers. Frozen fillets and steaks are the most popular in the vacuum packed 4-6 ounce, and 6-9 ounce portion sizes due to the convenience of preparation at the restaurant level. The abundance of international competition is evident with salmon being sourced from Iceland, Alaska, and the United States East coast.

LOS ANGELES

SALMON IMPORTS TO SOUTHERN CALIFORNIA

	(Pounds)
Salmon, Coho	319,440
Chile	292,812
Canada	26,628
Salmon, King	302,509
Canada	268,891
New Zealand	29,441
Chile	2,784
Ecuador	1,474
Smoked Salmon	257,796
Norway	189,132
Canada	36,149
United Kingdom	30,007
Sweden	1,943
New Zealand	482
Japan	83
Other Salmon Products	3,255,486
Norway	2,782,998
Canada	143,609
Chile	126,255
United Kingdom	115,102
New Zealand	49,263
Netherlands	22,096
Denmark	9,061
Ireland	3,701
Thailand	2,138
Mexico	1,219
Japan	44
TOTAL EXPORTS TO SOUTHERN CALIFORNIA	4,137,038

SALMON IMPORTS TO LOS ANGELES

	(Pounds)
Fresh	3,858,004
Frozen	239,287
Preserved	38,506
Canned	756
Dried	485
TOTAL SALMON EXPORTS	4,137,038

MINNEAPOLIS

SUPPLY AND CONSUMPTION

Salmon is the most popular fish species sold in the Upper Midwest market, followed by cod and walleye/pickrel. Salmon ranks first in sales in both retail and foodservices, with retail sales currently being the predominant and most rapidly increasing market segment. Minneapolis/St.Paul's two largest retail chains, CUB Foods and Rainbow Foods (which control 55 percent market share in the Twin Cities market and are expanding operations throughout the central U.S.) both have very aggressive fresh fish marketing programmes and consumer education programmes that have greatly increased fish consumption in this market area over the past few years. These two chains have the ability to move considerable quantities of fish through their outlets in a very brief time span. A typical fresh salmon promotion by one of these chains could involve special pricing and a modest newspaper advertisement, and could result in sales of 15-20 truckloads of product in one week.

Alaska is the source of most salmon sold in the Minneapolis/St.Paul market, followed by Norway. Most Canadian salmon sold in the market is sourced through B.C. Packers. There is one local farmed salmon firm which has become a factor in the market: Minnesota Aquafarms of Chisholm, Minnesota. Operating in abandoned open-pit mines in the northern part of the state, the firm now processes approximately 25,000 pounds per week. The product is able to command a premium price because it is carefully processed with meticulous bone removal.

In the Minneapolis/St.Paul market, salmon steaks are more popular with consumers than fillets. Canned salmon consumption is declining as inexpensive fresh salmon has become more readily available. Frozen portion-pack salmon steaks are used considerably in the foodservices trade. The market for smoked salmon is small, largely due to high price levels and a Minnesota state law regulating the sale of smoked fish which effectively prohibits cold smoked product. (This law is currently undergoing revision and new legislation, to be enacted within the next few months, will open the local market to Canadian processors).

TARIFFS

There are no trade barriers other than the Minnesota state legislation concerning smoked fish products currently being revised. The major health concern with the U.S. Food and Drug Administration is listeria, a problem well recognized by Canadian industry. All relevant health regulations for Canadian salmon exports to the U.S. are highlighted in detail at the end of this chapter.

POST PROPOSALS

Buyers from the major retail chains and the wholesale firms that supply them have expressed interest in sourcing from Canadian processors. If there is likelihood of large production they would be very interested in exploring the possibilities of a special one-week fresh fish promotion. Considerations the buyers deem important in putting together a programme are as follows:

1. Quality. Overall freshness, bone removal, consistency of size.
2. Adequacy of supply.
3. Guarantee of price and quantity with at least a 3 week lead time.
4. Logistics of delivery.

The buyers may be approached directly, but may recommend that Canadian processors use the services of a local broker or marketing consultant to assist in putting together a complete promotional programme. Buyer names and broker recommendations are readily available from the Canadian Consulate General in Minneapolis.

NEW YORK

SUPPLY AND CONSUMPTION

Salmon consumption in the New York marketing area has been increasing in recent years, and it is likely to grow even further in the future. In the New York market, farmed Norwegian salmon currently dominates supply. According to the National Marine Fisheries Service the following figures apply to the receipts at the Fulton Fish Market by salmon species for 1989.

	(Pounds)
ATLANTIC SALMON	4,398,200
Delivered By Air	4,340,600
Norway	4,146,200
Iceland	103,500
Chile	101,900
Scotland	37,900
Ireland	30,200
Faroe Islands	19,200
British Columbia	9,700
New Brunswick	2,000
Delivered By Truck	47,600
New Brunswick	37,900
Nova Scotia	9,200
Maine	500
CHUM SALMON	14,600
Delivered By Air	14,600
Washington	10,800
British Columbia	3,800
KING SALMON (RED)	208,600
Delivered By Air	201,200
California	129,400
British Columbia	59,700
Washington	8,300
Alaska	3,800
Delivered By Truck	7,400
California	7,400
SILVER SALMON (COHO)	54,000
Delivered By Air	51,400
British Columbia	28,900
Chile	21,000
Washington	1,500
Delivered By Truck	2,600
British Columbia	2,600

SEATTLE

SUPPLY AND CONSUMPTION

Despite the high regional production (post territory includes Alaska) of salmon products, a combination of quality, price and availability (timing) has enabled Canadian salmon to become a strong contender in the Seattle market.

CANADIAN SALMON EXPORTS TO SEATTLE

January 1991 - September 1991

Description	Pounds	\$US
Atlantic, fresh (99% farmed)	4,673,770	14,477,734
Atlantic, frozen	12,425	32,708
Chinook, fresh (78% farmed)	24,782,468	60,207,261
Chinook, frozen	1,110,898	2,667,236
Coho, fresh (40% farmed)	1,143,597	2,208,006
Coho, frozen	351,834	705,035
Chum, fresh	3,194,705	3,941,824
Chum, frozen	1,818,312	2,085,447
Sockeye, fresh	2,140,287	3,311,956
Sockeye, frozen	244,195	577,274
Sockeye, canned	178,546	744,469
Pink, fresh	1,199,911	744,512
Pink, frozen	696,687	668,511
Pink, canned	541,390	940,486
Salted	90,353	326,225
Smoked	30,603	182,511
Other, canned	72,108	125,050
Other, prepared	9,237	43,918

POST PROPOSALS

Canadian salmon exporters considering approaching the Seattle market must focus on quality and price through wholesalers which usually cover both the retail and foodservices and to salmon processors. Based on the large local production available on the market, timing is a key variable for Canadian exporters to consider. The best opportunities exist for fresh farmed chinook and Atlantics, fresh chum and fresh sockeye.

BEST U.S. CITIES FOR BUSINESS

Canadian salmon exporters may wish to consider establishing sales offices or forming joint ventures in the United States in an attempt to increase market share for Canadian salmon products. Most U.S. importers of salmon demand a high quality product, coupled with superior after sales service. Investing abroad is one method of establishing a solid presence in foreign markets. Sociological and demographic trends in the United States create an evolving environment for firms considering investments abroad. The market intelligence highlighted below may help Canadian exporters who may be contemplating expansion of sales in the U.S. market. Over the past three years, *Fortune* magazine has been conducting a survey of major U.S. cities in an attempt to establish which cities are the best for business. The findings of the survey are highlighted in the following market intelligence.

Fortune magazine found that a trend was evident which placed cost as far more important than it had been for business during the 1980's. A senior V.P. for the consulting firm who directed the survey, indicated that increased globalization of the world economy has made "cost containment with an emphasis on quality an imperative". *Fortune* magazine stated attributes which executives most demand in a city when considering an investment, they are:" a flexible, high-quality work force; proximity to markets; a strong local pro-business attitude; a good public education system; convenient air service to key cities; costs--housing, labour, facilities, and taxes; an efficient highway system; and a whole host of intangibles leading to quality of life". The survey concluded that the cities in the U.S. which offer the best value represent the most attractive environment for developing a business presence. Results of the survey may provide information to Canadian salmon exporters about possible metropolitan centres to consider when making investment decisions in the United States. The top ten U.S. cities for business identified in the survey are listed below.

1. Atlanta, Georgia
2. Dallas/Fort Worth, Texas
3. Pittsburgh, Pennsylvania
4. Kansas City, Missouri
5. Nashville, Tennessee
6. Salt Lake City, Utah
7. Charlotte, North Carolina
8. Orlando, Florida
9. Austin, Texas
10. Phoenix, Arizona

**Extracted from "The Best Cities for Business" *Fortune*, December 4, 1991. Pg 52.

UNITED STATES HEALTH REGULATIONS FOR SALMON

BACTERIA

Cold smoking does not inhibit bacterial infection of the salmon product. The two bacterium of concern to Canadian smoked salmon producers are Clostridium botulinum, type E, and Listeria monocytogenes.

Clostridium botulinum type E, generally known as botulism, are a common marine bacteria. Due to its ability to survive in cold, anaerobic conditions, the threat of its presence caused Health and Welfare Canada to issue strict packaging regulations which require vacuum packed cold smoked salmon to be frozen to inhibit bacterial growth. The regulations, contrary to the market preference for a fresh vacuum packaged product, place Canadian smokers at a competitive disadvantage because international competitors do not face similar packaging rules and freezing requirements.

Listeria monocytogenes are a common bacteria most frequently found in dairy products. Listeriosis, the disease caused by the bacteria, is fatal to about one in four people infected. Although no illness has been linked to listeria infected seafood, concerns have been high since the bacteria was found in smoked salmon. The U.S. Food and Drug Administration has instituted testing for Listeria contamination, and restricts entry to the United States to zero level tolerance. Further complicating the smoking industry, is the fact Canadian and U.S. testing protocols are not mutually acceptable, thus testing by Canada does not preclude testing and rejection by the United States. In the case where a test reveals the presence of the bacteria, all subsequent shipments by that smokehouse will be subject to testing and possible rejection by the U.S. authorities. United States authorities tests generally take about ten days, unfortunately, a bacteria free shipment is by then already close to the end of its viable shelf life and may not be accepted by the buyer.

The presence of Listeria monocytogenes bacteria in cross border shipments has directly led to the closure of at least six major Canadian salmon smokehouses. With plant cleanliness as the only preventative measure available to Canadian salmon smokers, the industry must completely eliminate the bacteria from its product. In Europe, many salmon smokehouses employ radiation to kill bacteria. The radiation process is neither acceptable to the public, nor permissible by law in North America.

LATIN AMERICA

MEXICO

SUPPLY AND CONSUMPTION

The local Mexican market for salmon products is mainly limited to the upper middle class and wealthy segments of the population. Salmon products are available in smoked vacuum-packed forms to consumers through major supermarket chain stores and specialty fish marketing outlets in all major Mexican cities, or fresh and smoked through the gourmet restaurant trade. Pacific (*Oncorhynchus spp.*), Atlantic (*Salmo salar*) and Danube (*Hucho hucho*) are all imported in fresh, chilled (refrigerated), frozen and smoked form. The following import statistics for salmon products are in U.S. dollars and released by the Secretaria de Comercio Y Fomento Industrial (SECOFI).

H.S.C.	Description & Main Suppliers	1989	1990
0302.12.01	Fresh, chilled (refrigerated)	84,179	148,957
	United States	66,389	102,926
	Norway	—	26,991
	Belgium	6,619	13,322
	Chile	—	3,453
	Canada	11,171	2,147
0303.10.01	Other	—	118
	Pacific, frozen	132,422	185,983
	United States	115,362	168,973
	Canada	16,363	12,825
	Norway	—	2,961
	Netherlands	—	783
	Denmark	100	300
	Chile	—	131
	France	445	10
Other	152	—	
0303.22.01	Atlantic & Danube, frozen	119,013	270,622
	Norway	82,288	186,173
	United States	36,701	63,613
	Isle of Niue	—	20,769
	Chile	—	67
0305.41.01	Other	24	—
	Pacific/Atlantic/Danube, salt/dry, smoked	433,402	904,884
	United States	276,179	479,191
	Norway	79,717	200,723
	Canada	5,547	24,831
	Chile	321	24,343
	Belgium	12,914	21,086
	Spain	1,432	7,199
France	183	4,356	

TARIFFS

Under current regulations in Mexico, permits are not required to import salmon products, although the ad valorem duty is extremely high at 50 percent. Negotiations between Canada, Mexico and the United States toward a North American Free Trade Agreement, if completed, will help provide improved tariff access for Canadian and U.S. salmon suppliers over offshore countries (eg. Norway, Scotland).

HEALTH REGULATIONS

All seafood imports require a commercial invoice, bills of lading, certificate of origin, free sale certificate and health certificate declaring that the salmon product is within maximum levels for heavy metals established in Codex Alimentarius. A "Free Sale Certificate" is also required and is a declaration on the exporters letterhead stating the products processed by the company are genuinely Canadian and comply with all sanitary conditions and regulations established by Canadian health authorities, and cleared for consumption in Canada and abroad. All documents must be attested to by competent Canadian authorities and Visaed by a Mexican Consular Office in Canada.

POST PROPOSALS

Price competitiveness and optimum product quality are paramount considerations when approaching the Mexican market which, as may be seen by the previous statistics, is supplied by many other countries including Canada. A promising marketing initiative in the Mexican market would be aggressive promotions, particularly aimed at the gourmet restaurant trade. Properly targeted promotions could result in increased export volumes of smoked, fresh, chilled and frozen salmon products to the Mexican market. Marketing promotions should consider, because of the specialty/gourmet characteristics of salmon in Mexico, the post does not expect significant increases in marketing opportunities at the supermarket outlet level.

ASIA/PACIFIC

AUSTRALIA

SUPPLY AND CONSUMPTION

With a population of approximately 16 million, Australia offers an attractive market for particular Canadian salmon products. Australia has established, on the island state of Tasmania, a viable Atlantic salmon industry which is presently suffering from over-supply. Past Canadian export sales to Australia have been dominated by canned salmon (\approx 75 percent). Opportunities do exist for Canada to export more salmon products to the Australian market, but efforts down the years have seen no significant change from the predominance of canned salmon.

HEALTH REGULATIONS

Fresh salmonids are banned from import to the Australian market. Salmon must be heat smoked under prescribed conditions in plants approved by the Australian quarantine authorities (details may be obtained from your local office of the Department of Fisheries and Oceans). Mercury limits for seafood entering Australia must not exceed .5 ppm.

POST PROPOSALS

Australia is a sophisticated and price-conscious market for fish products and therefore presentation, consistent quality, and continuity of supply are of paramount importance. It can be expected that Australian importers will not even acknowledge an offer that vis by international standards not reasonable. The market, however, is a reliable one and one that generally pays as specified.

HONG KONG

SUPPLY AND CONSUMPTION

Hong Kong residents have an affection for seafood in their daily diets. Approximately 460 tonnes of seafood is consumed each day by the Hong Kong population, compared to only 300 tonnes of poultry. About 40 percent of seafood consumption is supplied from local waters while the balance comes from foreign suppliers. Local Hong Kong production and processing generally complements rather than competes with imported products, and helps to satisfy the local demand for live/fresh fish. Demand is increasing for seafood in Hong Kong as total imports rose in 1990 by 12 percent.

Virtually all salmon consumed in Hong Kong is imported, primarily from Scotland and Norway. Demand for salmon products has been growing by approximately 5 percent per year. Total salmon consumption is approximately 1,000-1,500 metric tonnes per year in Hong Kong with Canada supplying approximately 10 percent of the market. Canadian salmon products had a reputation with Hong Kong importers as being of a higher, consistent quality, however, consumers are not informed about salmon as a species.

The main species imported from Canada are coho and chum in sizes of 7-9 pounds, head-off and gutted. Primary outlets for salmon products in Hong Kong are hotels, Western style restaurants, caterers and, to a smaller extent, high-end supermarkets and delicatessens. Approximately 40 percent of frozen salmon imports go to the hotels and 60 percent of frozen goes to Western style restaurants; while 80 percent of fresh salmon goes to hotels, 18 percent to Western style restaurants, and 2 percent to Chinese restaurants. Salmon is less popular in Chinese restaurants largely because it is not considered to blend well with Chinese ingredients or lend itself to Chinese cooking methods. Salmon heads are gaining favourable reaction from Chinese chefs as well as Hong Kong households due to the price and good taste.

Salmon products are usually handled by importers who bring in shipments on their own accounts and then distribute the product either directly, or through wholesalers to hotels, restaurants and retail stores. Distribution may be channelled through either importers-endusers or retailers, or importers-wholesalers-endusers or retailers. Hotels, restaurants and other foodservices establishments do not usually purchase directly from the overseas suppliers, but rather from the importers or wholesalers on a contractual basis for a period of 3-6 months on prices agreed upon by both parties, with prices controlled by the Hong Kong importers. Canadian salmon is not as competitive as Norwegian and Scottish salmon largely because of price. Although Norwegian salmon is accepted by the trade as offering superior quality, prices are lower than Canadian salmon due to considerable government assistance as well as focused and extensive promotional activities.

The salmon market, as with other food markets in Hong Kong, is extremely competitive. With respect to quality, Canadian salmon has the following drawbacks, especially in fresh/chilled form.

1. Colour is too pale compared to Norwegian and Scottish salmon.
2. Spots on the skin, which give the appearance that the salmon was once frozen, then thawed and sold to Hong Kong as fresh.
3. Meat is too soft, the Chinese prefer it firmer.
4. Not enough fat content, the Chinese prefer it more oily in appearance.
5. Poor and inconsistent size standards in shipments.

1990 SMOKED SALMON EXPORTS TO HONG KONG

	Quantity	Value (\$Cdn)
United Kingdom	79,455	1,492,679
Norway	51,005	822,192
Canada	42,617	620,779
United States of America	6,613	91,875
Japan	3,428	64,668
France	3,276	173,382
Denmark	1,820	25,908
Switzerland	384	39,244
Sweden	330	6,340
Belgium/Luxembourg	329	6,982
Netherlands	236	5,009
Germany	172	3,268
New Zealand	144	6,044
TOTAL IMPORTS	189,807	3,358,374

TARIFFS

Hong Kong is a free port, and as such, there are no import tariffs which affect salmon product imports.

HEALTH REGULATIONS

Health regulations imposed on the importation of salmon products into Hong Kong are outlined in the "Public Health and Urban Ordinance, Food and Drug Section". Allowable limits for certain specific substances in salmon products are listed below.

Tin	230ppm
Arsenic	6ppm
Lead	6ppm
Cadmium	2ppm
Antimony	1ppm
Chromium	1ppm
Mercury	0.5ppm

POST PROPOSALS

The selling features of Canadian salmon need to be identified and promoted so as to improve both importers and end-users perceptions towards Canadian salmon products. Foremost is quality and consistency of supply for Canadian salmon exporters to increase positive exposure in the Hong Kong market. Promotional activities to be considered by Canadian salmon exporters and associations could include educational workshops targeted at hotel chefs and importers. Promotional leaflets and brochures describing the processes, species, nutritional value and other features of Canadian salmon should be developed and distributed widely to complement any promotional activity. Coordinating promotional activities with hotels could be undertaken to influence consumption by the tourist trade. The High Commission for Canada in Hong Kong annually organises food promotions with various hotels and supermarkets.

JAPAN

SUPPLY AND CONSUMPTION

The salmon and trout species available in Japan fall into five categories: (1) fall Chum salmon returning to spawn in the rivers into which they were originally released, primarily caught in fixed nets; (2) spring season salmon and trout from the North Pacific and the Japan Sea; (3) silver salmon bred in sea water; (4) imported fish from the U.S. and Canada, mainly non-captive-bred red Salmon; and (5) captive-bred salmon and trout primarily from northern Europe and Chile. Japanese domestic production for the first three categories was estimated at 187,000 tonnes in 1989. An increase in the number of young fall chum salmon released into Japanese rivers has resulted in greater numbers returning to spawn in recent years. Silver Salmon has also enjoyed a rapid increase in production during recent years. Quota restrictions on the size of Japanese catches in Soviet waters has resulted in a decrease in the spring landings of salmon and trout.

Until 1975, North Pacific salmon (**hokuyo sake**) and North Pacific trout accounted for the majority of domestic output. A gradual strengthening of restrictions on offshore fishing resulted in a steady erosion of earnings to the point where catches have been reduced to about 20,000 tonnes, or 20 percent of past landings. Compensating for the decline in North Pacific salmon is the fall chum salmon. Long-term research has shown the number of salmon returning to spawn has increased dramatically: in 1975, approximately 17.5 million salmon came back to spawn resulting in 58,000 tonnes of landings; by 1986, the number had increased to approximately 48.6 million fish, or 155,000 tonnes of landings. Earnings from fall chum have been stable and good stocks levels are being maintained.

Captive breeding of silver salmon has been increasing steadily over the past decade in Japan. Production is centered in **Miyagi Prefecture**, with this area accounting for almost 90 percent (10,000 tonnes) of the total output. Silver salmon from Miyagi are regarded as being of high quality. The salmon farming industry in Japan faces a major problem from salt water pollution, consequently, the short-term prognosis for the sector is that there will not be significant growth. Annual domestic Japanese production has been stable at 180,000 tonnes. Output of salmon has been increasing, trout production has experienced a downturn and now accounts for only 10 percent of total salmon and trout production. **Hokkaido** accounts for approximately 80 percent of salt-preserved salmon and trout. Production of smoked salmon and trout has increased rapidly, growing by 400 percent over the last ten years. Japanese production of canned salmon and trout has fallen.

Japan is the largest importer of marine products in the world. In 1989, total imports were 2.3 million tonnes worth US\$10.5 billion. Third in importance were salmon and trout at \$940 million, or nine percent. Salmon and trout have always been favourite species in the Japanese market and have been indicators of the general demand in the domestic

market. Total domestic Japanese consumption of salmon and trout in 1989 was estimated at 320,000 tonnes. In 1988, imports of fresh, chilled and frozen salmon and trout totalled 133,163 tonnes, representing a 20.3 percent increase over 1987. In 1989, imports increased by a further 11.9 per cent to 148,983 tonnes. Frozen fish products account for approximately 90 percent of imports, with fresh, salted and canned fish making up the balance. There have been significant advances over the last two or three years by northern European suppliers of captive-bred Atlantic salmon and sea trout. The main consumers of salmon in Japan are smoked fish producers, with fresh salmon suppliers around the world air freighting product to Japan.

The United States is the largest supplier of salmon and trout to Japan, with Canada second. In recent years, the U.S. share has fallen from 85.4 percent in 1987, to 67.8 percent in 1989, while Canada has been the main beneficiary. Also on the increase are imports of fresh and chilled salmon from Norway. Imports from the Soviet Union account for only 1-3 percent of Japanese imports. Underlying the large increase in imports from Canada is the 1989 US-Canada Free Trade Agreement, which lifted the export restrictions which applied to salmon and trout not classified as "top-grade". Strikes by wharf workers and incidents of supplying second and third-grade salmon, however have eroded confidence in Canada's ability to guarantee continuity of supply and quality control.

HEALTH REGULATIONS

The importation of fresh and frozen salmon is covered by the Quarantine Act and the Food Sanitation Act. Any wholesaler wishing to import salmon or trout must submit an "Import Notification of Food etc", (**Shokuhin nado yunyu todoke sho**) for each shipment to the Ministry of Health and Welfare through the Quarantine Office in the port of entry. The submission must include the following information: the name of the imported product; the port of origin; the amount and weight of the product; the name and address of the processor in Japan; a list of preservatives; and any other relevant information. The importer must provide a statement concerning action to be taken if there is an accident, or problems during transportation of the goods within Japan. Frozen salmon products must state the appropriate action to be taken if the refrigeration unit breaks down during transportation and the goods are spoiled. Goods satisfying quarantine regulations are forwarded to Customs for processing. Where an inspection is deemed necessary, on-site tests will be carried out by Quarantine Officers stationed at all major ports of entry. Goods which fail the on-site inspection are either returned to the country of origin, or destroyed. The process of disposing of goods is the responsibility of the importing agent. Canadian salmon exporters should be aware that local provincial and municipal governments have additional regulations relating to bacteria content and freshness, and to ensure the transportation of salmon within Japan is conducted in a hygienic way.

TARIFFS

The import tariffs for fresh and chilled, excluding fillets, Pacific and Atlantic salmon and frozen, excluding fillets, is 5 percent; dried, salt-preserved and salt-water preserved salmon and trout roe is 5 percent; fillets, excluding smoked salmon, is 12 percent; smoked salmon and trout is 15 percent; dried salmon and trout, excluding smoked fish, is 12 percent; and salt-preserved salmon and trout is 12 percent.

NEW ZEALAND

SUPPLY AND CONSUMPTION

The only Canadian salmon products currently imported into New Zealand are canned and account for approximately 90 percent of the market. Even though Canadian market share is very high, the figure is a slight reduction from the past due to increased competition in the market. Smoked salmon products no longer are allowed entry to the market because of regulations implemented over the past year following food studies carried out in Australia and consequently adopted by New Zealand.

POST PROPOSALS

The post in Wellington has proposed conducting a Canadian canned salmon promotion in the new fiscal year to ensure Canadian products continue to maintain the current market share. Program approval is still required and until such time, the planned events are only in the proposal stage.

SINGAPORE

SUPPLY AND CONSUMPTION

The Singapore market demand for salmon is still relatively small with the bulk coming from high-end institutional users, like hotels and continental restaurants. Total salmon imports to Singapore are minimal, and as such, no comprehensive statistics are available from local trade sources. Salmon imports are classified under the general fish category.

The main competition to Canadian salmon producers are clearly the Norwegians who dominate the market in Singapore and are aggressively participating in every major seafood event in the country. Although the profile and awareness generated for Norwegian salmon has been high, it is not expected salmon consumption will increase dramatically in the near future, given taste preferences, non-familiarity with the species, and eating habits of the 76 percent ethnic Chinese local population. Any significant increases in salmon consumption in Singapore will originate from an increased tourist consumption largely through the hotel/restaurant trade, and promotional efforts should be directed at this sector of the consumer market. Major institutional brokers, ship chandlers, seafood distributors, and niche end fine food traders constitute the main salmon importers. The main product forms imported into Singapore are fillets, smoked, frozen, and fresh whole salmon products.

TARIFFS

Salmon product imports receive duty-free entry to Singapore and are not subject to any form of official trade barriers. The Singapore importer must register the transaction with the local agricultural authority. The implementation of TRADENET, a fully computerized trade processing system, has provided the structure for all trade transactions to be processed electronically without cumbersome documentation.

POST PROPOSALS

General market intelligence received from Singapore salmon importers is that they regard Canadian salmon as somewhat inferior to Norwegian salmon. Singapore importers feel Norwegian salmon is more price competitive and they receive good after-sales support from the Norwegian exporters. They are strongly committed to their Norwegian suppliers. A few Norwegian salmon companies have formed joint ventures with local Singapore companies in an attempt to gain a stronger market share in the local Singapore salmon market. Canadian salmon exporters must promote their products aggressively in Singapore if larger market shares are to be realized. Targeting the hotel/restaurant sector of the economy may be an avenue for increasing the exposure of Canadian salmon products.

SOUTH KOREA

SUPPLY AND CONSUMPTION

According to the latest edition of the Food Balance Sheet prepared by the Rural Economic Research Institute, Korea consumed a total of 2,526,700 metric tonnes of fish in 1989 (including 301,500 Metric tonnes of seaweed). Per capita consumption of fish is high at 36 kilograms per capita. By species, daily per capita consumption of fish was: pollack at 14.33 grams; mackerel at 6.33 grams; sardine at 5.84 grams; and anchovy 5.37 grams. Per capita consumption figures for salmon are unavailable because salmon is considered a luxury item and is not regularly consumed by Koreans.

The National Fisheries Administration maintains salmon hatchery farms on the east coast and releases approximately 14 million head of salmon fingerlings into the sea per year. Unfortunately, total return rates are limited to a small amount of chum and pink salmon, an estimated total of 27 metric tonnes in 1988 and 57 metric tonnes in 1989. Korea has an efficient salmon processing industry and imports over 2.5 million tonnes of frozen salmon and exports roughly the same amount as canned salmon products. Both import and export volumes of salmon have been declining substantially over the past two years. Many salmon canneries have been closed over the last two years due to non-competitive export prices. Imports of fresh salmon are small, but Canada is the largest supplier with approximately 92 percent of total market share. The United States and Singapore are the major competitors for frozen salmon by holding 64 percent and 26 percent of total market share respectively. Canada's market share has been 0.9 percent of total market share in 1988, 2.9 percent in 1989, and 1.8 percent in 1990. Prior to 1990, there were three large salmon canneries in Korea which imported substantial amounts of frozen salmon for processing, but all three operations have since discontinued production.

Salmon products are eaten in Korea fresh, cooked and smoked. Although the consumption of fresh salmon is extremely limited (approximately 2 percent of total fish consumption) due to higher prices, fresh salmon is mainly used for making raw dishes (*sasimi* or *susi*) in hotels and upper-class Japanese style restaurants. Korean importers prefer 8-10 pound King or Chinook salmon which is generally imported by air in 50 pound styrofoam packs. Smoked salmon is mainly consumed in tourist hotels, buffet restaurants and department stores with approximately 97 percent of frozen salmon imports going for domestic smoking purposes. Korean importers prefer 6-9 pound chum and sockeye, head-less and gutted, and imported in 50 or 100 pound standard wooden box packing. A limited quantity of imported frozen salmon is processed into 2-4 pound or 6-9 pound individually sliced consumer packages for housewives who buy from department stores to cook salmon soups or steak.

Peak demand for salmon in Korea is in the month of December with the lowest demand occurring during the months of July and August. There are three licensed salmon smokers in Korea, but most first class hotels possess their own smoking facilities. The names and addresses of fresh salmon importers and smokers are listed below.

NEW STAR TRADING COMPANY

16-1, Noryangjin-Dong
Dongjak-Ku, Seoul
Fax: 815-7221
Contact: Mr. Y.D. Kim, President
Products: fresh salmon

KOREA TOURIST HOTEL SUPPLY CENTER

255-5, Neung-Dong
Seongdong-Ku, Seoul
Fax: 452-7294
Contact: Mr. H.H. Yoo, Director
Products: fresh salmon

CHUNGJIGI TRADING COMPANY

517-4, Sinsa-Dong
Kangnam-Ku, Seoul
Fax: 542-546
Contact: Mr. G.C. Kim, President
Products: fresh salmon

JEIL REFRIGERATOR COMPANY

Room 901, Sungwan Building
1-2, Bukchang-Dong
Choong-Ku, Seoul
Fax: 755-6743
Contact: Mr. D.S. Kang, Exec. Director
Products: salmon smoker

TIFFANY FOOD COMPANY LIMITED

4th Floor, Dongwon Building
243-6, 1 Ka, HanKang-Ro
Yongsan-Ku, Seoul
Fax: 795-4927
Contact: Mr. K.H. Yoon, President
Products: salmon smoker

DEA KWANG FOODS COMPANY

Room 212, Kapo Building
126-2, Hyoje-Dong
Chongro-Ku, Seoul
Fax: 743-3333
Contact: Mr. H.J. Chung, President

Fresh salmon is limited to the higher-class market, and as such, Korean importers generally distribute the product directly to the hotels and Japanese style restaurants. With the exception of **Jeil Refrigerating Company Limited** which maintains five sales agents in major Korean cities, smoked salmon is distributed directly to smokers to hotels, buffet restaurants, hotel food dealers, and high quality fish stores in the main fish markets. The custom sliced consumer packs in 2-4 pound and 6-9 pound packages of frozen salmon are sold mainly through department stores and large supermarkets. Smoked salmon is currently sold to agents and dealers at approximately \$21.42 Cdn per kilogram and in department stores for \$55.55 per kilogram. Sliced salmon steaks are sold to dealers for \$7.93 and for \$19.04 per kilogram in department stores. Fresh salmon is sold to hotels and restaurants at \$23.80 per kilogram.

POST PROPOSALS

Salmon has not been traditionally a common species in Korea and there are still many Koreans who have never tasted salmon. The Korean government applies a 20 percent tariff on fresh or chilled salmon and a 10 percent tariff on frozen salmon, but this does not present a major obstacle for expanding salmon consumption in Korea. The consumption patterns are changing rapidly for certain food products among the younger Koreans, but the consumption of seafood is not changing as fast as it is for other food products such as hamburgers, sausages and french fries. As virtually all salmon is imported, consumers have a perception that salmon is much higher in price than other locally available species. Major supplying countries such as Canada and the United States should be able to change the general recognition of consumers on salmon through promotions, and an expansion of the market could be expected. The state of Alaska held a major salmon promotion in September 1991. A greater degree of international travel has been exposing a new generation of Korean consumers to the taste of salmon products.

Canada has been able to maintain a very good image in Korea with respect to salmon quality, but Korean importers claim that the price of frozen salmon is approximately \$US 0.20 higher per kilogram than Alaskan salmon products. Canadian suppliers should continue to maintain the current quality standards and reasonable prices as well as considering the following promotional events: develop new recipes or menus to distribute to hotels, restaurants and consumers through importers or department stores; host salmon seminars with cooking method demonstrations; host in-store promotions with Korean importers; distribute salmon literature including posters. and direct salmon marketing efforts at Korean tourist groups, airlines, and hotels and restaurants catering to the Korean tourist trade in Canada (approximately 50,000 per year).

TAIWAN

SUPPLY AND CONSUMPTION

Taiwan imported less than 50 metric tons of salmon products in 1989. Thirty-four tons (70 percent) of salted salmon was imported from Japan, and ten tons were imported from Canada, which included 1.3 tons of smoked salmon.

1989 TAIWAN SALMON IMPORTS

	(Kilograms)
Pacific, fresh or chilled	171
Japan	116
USA	55
Pacific, frozen	7,938
Canada	7,938
Atlantic, frozen	1,227
USA	1,227
Smoked	3,106
Japan	1,477
Canada	1,283
Norway	250
Hong Kong	96
Salted	34,601
Japan	34,601
Whole or pieces, prepared or preserved, frozen	612
Canada	612
Canned, prepared or preserved	24,219
Japan	24,168
USA	51
Other, prepared or preserved	5,535
Japan	4,638
USA	897

Most frozen salmon imports to Taiwan are sold to western style restaurants, with salted salmon generally served with rice gruel for breakfast at home. Mr. Dah-wen Shieh, Deputy Director of Fisheries Department, Council of Agriculture (COA), indicated salmon is not widely recognized and accepted by Taiwan consumers. At home most Taiwan families prepare fish by steam or quick fry methods, and salmon has yet to be included among the fish products used.

TARIFFS

Tariff reductions have taken place in Taiwan over recent years in an attempt to liberalize the import regime, in part due to an attempt by the territory to gain entry into the General Agreement on Tariffs and Trade (GATT). The leaders of Taiwan have structured rounds of tariff reductions with the latest occurring in 1989. A further round of reductions is scheduled for 1992. Salmon products experienced very small reductions in the 1989 round of tariff cuts and it is unknown how salmon products will be treated in the next round of tariff reductions.

TARIFF REDUCTIONS

	Pre-1989	1989
Pacific, fresh, chilled, frozen	45%	35%
Atlantic, fresh, chilled, frozen	50%	40%
Smoked	50%	40%
Salted or in brine	20%	15%
Not minced, prepared or preserved, canned	25%	22½%

An import permit is required for salmon products entering Taiwan, which must be licensed by an authorized bank. Imported salmon products are taxed and released only after being approved by the port quarantine section of the Department of Health.

THAILAND

SUPPLY AND CONSUMPTION

Thailand is ranked number one in the world in terms of fishery production, and the catch is ample enough to supply domestic demand with excess allocated to export-oriented industries. Fishery exports now rank in the top five export sectors in the Thailand economy. Market potential does exist for salmon in Thailand, largely among the institutional services such as airlines, first class hotels and local foreign communities. The local market for imported salmon products is small, but expanding.

THAILAND SALMON IMPORTS

Description	1989	1990
Fresh or chilled	1,437	1,777
Norway	525	1,462
Japan	508	315
Sweden	327	--
United States	50	--
Australia	27	--
Other Salmonidae, excluding livers & roes	42,334	23,365
Norway	34,126	20,174
Australia	1,220	1,135
United States	4,670	1,089
United Kingdom	--	842
Singapore	95	50
Austria	--	45
Canada	--	20
New Zealand	--	10
Malaysia	1,620	--
Netherlands	415	--
Taiwan	168	--
Japan	20	--

TARIFFS

A customs duty of 60 percent applies to salmon imports and is based on a C.I.F. basis.

HEALTH REGULATIONS

No health certificate is required for fresh or frozen salmon products imported into Thailand, however, all food products imported into Thailand must get permission from the Office of Food and Drug Administration.

POST PROPOSALS

The post expresses the view that there is market potential for Canadian salmon products in Thailand. Activities in the past have attempted to introduce salmon to the local market, but little success was realized largely because Canadian salmon products are not price competitive with other fishery products available on the market. Local importers/agents play a critical role in distributing salmon to institutions, and the following list represents major importers of food products into Thailand.

SIAM FOOD SERVICES

2439 Old Paknam Railway Road,
Bangkok 10110
Fax: (662) 249-7294

**VITA FRESH-VITAPAC COMPANY
LIMITED**

302/93-95 Taveemitr Ahcienda
Asoke Dindaeng Road, Huay Kwang,
Bangkok 10310
Fax: (662) 247-1865

**CHOICE FOOD (THAILAND)
COMPANY LIMITED**

595/10-11 SOI 33/1, Sukhumvit Road,
Bangkok 10110
Fax: (662) 258-0705/6

SIAM MAKRO COMPANY LIMITED

3498 Lardprao Road,
Klongchan, Bangkok,
Bangkok 10240
Fax: (662) 375-2789

EUROPE
AND
NORDIC COUNTRIES

AUSTRIA

SUPPLY AND CONSUMPTION

Total salmon and salmonoid consumption in Austria is approximately 0.7 kilograms per capita a year. Total 1989 supply of salmon/salmonidae was 518.3 metric tons, valued at approximately C\$8.3 million C.I.F. the Austrian border. The major suppliers were Norway, Denmark, Canada and Sweden. Salmon exports to Austria generally travel through four main distributors (Nordsee, Cerny, Schenkel and Wiking) which are importers, wholesalers and retailers and/or chains (Nordsee). Deliveries are spread over the entire calendar year, but the pre-Xmas period is when demand increases by up to 30 percent for fresh and smoked salmon products. The generally accepted credit terms are for 30 days, however, terms depend on the specific contacts i.e. old-established or new contacts. Austrian consumers prefer Scandinavian salmon because of its even colour, consistent fat content, and the steady supply.

Fresh salmon arrives in the market usually in the form of fillets between 1 and 1.4 kilograms, or in steaks of approximately 0.2 kilograms. Smoked salmon products in airtight plastic containers are usually between 500 grams and 1.8 kilograms. If Canada can supply consistent colour and fat content all year round (not just using Austria as a "spot" market in an over-supply situation), in addition to overcoming the cost of transportation and duties, there appears to be no reason Canadian salmon exporters can not increase export sales to the Austrian market.

TARIFFS

Since July 1, 1990 EFTA suppliers (Norway, Sweden) have enjoyed duty-free entry for salmon products into Austria which represents an additional competitive disadvantage for Canadian suppliers. The difference amounts to approximately Austrian shilling 15.00, or roughly \$1.50Cdn per 100 kilograms, based on the 25 percent ad valorem duty.

HEALTH REGULATIONS

The Austrian importer is responsible for compliance with all standard regulations affecting imported salmon and salmon products. Allowable tolerance for mercury is no more than 0.50 ppm. Certification requirements are for a Certificate of Inspection, Origin and Hygiene (FP1404). A Certificate of Inspection, Content (FP1408) must also be obtained stating the fish product meets the required tolerances.

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.

Canadian exports of frozen salmon (the principal Canadian salmon export item) have declined by some 10 percent over the past five years from 391 tonnes in 1986 to 352 tonnes in 1990. In terms of species, coho continues to be the largest export item (estimated to represent almost 80 percent of Canadian exports), with sockeye, chum, pink and red king imported to a lesser extent. Canadian frozen salmon continues to be imported by the larger Belgium fish processors and smokers. The smaller smokers have switched to Norwegian salmon, partially because of the price competitiveness, but also because they can apparently order in smaller quantities on a more frequent basis.

BELGIUM SALMON IMPORTS

	(Kilograms)	1988	1989	1990
Live		6,300	3,000	8,000
Fresh/chilled		3,296,400	4,771,300	6,125,700
Frozen, Pacific		1,163,500	900,900	1,275,300
Frozen, Atlantic		210,300	286,200	226,300
Fillets, fresh		29,200	35,000	63,600
Fillets, frozen		34,700	90,400	95,200
Smoked		465,700	582,500	559,700

POST PROPOSALS

Canada has traditionally supplied the Belgium market with frozen salmon destined for the Belgium processing (as opposed to retail) sector. Canadian exports have declined in a salmon market which has grown significantly in the past few years. According to the Belgian trade, price competition and the ability of importers to import smaller than container loads of salmon from the Norwegians have influenced the decline in Canadian exports more than any other factors. Given the abundance and price competitiveness of Norwegian fresh salmon on the market, the possibilities for Canadian exporters to expand sales would seem to be limited in the general retail market. However, some individuals in the Belgium salmon trade think that there may be a niche market for Canadian wild salmon. The average Belgian consumer reportedly believes that all salmon is wild salmon, or at least does not recognize that there is a difference between farmed and wild salmon.

Promotional activities to be considered by Canadian salmon exporters to Belgium might include an awareness campaign to educate Belgian consumers on the differences between farmed and wild salmon, although the gourmet market (restaurants, specialty fish mongers) is already much aware of the differences between the Canadian wild and the Norwegian farmed product. Canadian exporters could capitalize on this awareness by providing a high quality and unique product. In addition to providing a wide variety of promotional materials (in both French and Dutch), there are a number of other possible marketing activities which could be undertaken. In September 1992, the TAVOLA trade fair for fine foods and delicatessen will take place in Kortrijk, Belgium. This fair concentrates on the upper end of the market for fine foods and was attended in 1990 not only by Belgian, but by Dutch, British, french and German fine food firms.

In addition, the first European Seafood Exposition which is being managed by the organizers of the International Boston Seafood Show will be held in Brussels from April 20-22, 1993. This event is in direct response to calls for an international seafood show in Europe and will be dedicated exclusively to seafood products and services.

DENMARK

SUPPLY AND CONSUMPTION

Danish aquaculture production started experimentally during the 1970's with production of approximately 300 tons. The pilot projects were sea-based and mainly rainbow trout was harvested. Denmark now has commercially developed sea-based aquaculture, and three land-based salt water pumping projects (with heated waste water). Annual production is approximately 5,000 tons, and is expected to increase to 10,000 tons during the next few years. The sea-based farms have been developed on a salt water production period from April to November, which tends to cause a glut on the market.

Despite of the availability of abundant quantities of fresh, high quality fish, Danish consumption is low, and salmon brokers estimate salmon consumption is also low at approximately 400 grams per capita. Greenland, Baltic and Norwegian Atlantic salmon generally command considerably higher prices than Norwegian and Danish farmed, or Pacific salmon generally. Greenland and Baltic salmon are marketed as "wild". The Baltic salmon caught off the island of Bornholm is provided with a metal tag on the tail with the boat number, a marketing initiative which has been successful in France. These salmon are used predominately for gourmet catering, while Norwegian, Danish farmed, and Pacific are principally used in the Danish smoking and pickling industries. The advantages enjoyed by the Danish and Norwegian salmon are: higher fat content than in Pacific salmon; easy accessibility in smaller lots rather than whole containers; consistent quality; and the overall better condition of the fish. Pacific chum are principally used by the Danish smokehouses, mainly because the species often incurs bruises during handling. Denmark also functions as a entrepôt for large quantities of Norwegian farmed salmon which increases availability. Danish smokehouses are estimated to use approximately 10,000 tons annually.

HEALTH REGULATIONS

The following acts, regulations, and guidelines can be examined for more extensive details concerning health regulations for salmon products entering Denmark. Labelling and marking standards can be complicated for certain products, and Canadian salmon exporters should contact the:

**Ministry of Fisheries
Stormgade 2 DK 1470
Copenhagen K. Denmark**

In addition, Bill No.#167 is the Act outlining the quality control of fish and fish products entering Denmark. Danish guidelines for nutritional labelling are contained in *Foodstuffs General Rules* (Specification DVN 1000:2); and for nutritional value (Specification DVN 1001:2).

FINLAND

SUPPLY AND CONSUMPTION

Per capita consumption of fish in Finland during 1989 was 18.8 kilograms, compared with 20.4 kilograms for beef and 31.8 kilograms for pork. The catch of wild salmon in 1989 was estimated at 1,051 tons. The production of rainbow trout by aquaculture totalled 20,000 tons. Consumption of farmed trout during 1989 was 4 kilograms per capita. In addition to the domestic catch of *Salmo salar*, 524 tons of frozen fillets were imported; 436 tons were sourced from Norway, 84 tons from Sweden, 3 tons from Canada, and 1 ton from Denmark. Total consumption of salmon was 315 grams per capita in 1989.

The production of farmed trout has doubled over the last five years and the industry is close to the point of saturation. The trend has been reflected in retail prices which makes trout one of the least expensive seafood items on the market. Finnish catches of wild salmon were remarkably good in 1989 and 1990 which has brought down the retail prices. Salmon and trout are retailed fresh, whole, gutted and filleted. Imported frozen salmon is not suitable for making *gravlax*, the main use of salmon in Finland. The major competitor for Canadian frozen salmon fillets are domestically farmed trout. The production of farmed trout increased from 2 million kilograms in 1975 up to 20 million kilograms in 1989. During the same period, the importation of frozen salmon fillets declined from \$250,000 in 1976, to \$40,000 in 1989. Domestic farmed trout fills the difference between demand and supply when the domestic catch of salmon is not sufficient.

There are four main wholesale and retail chains in Finland through which 95 percent of the Finnish food trade moves for both retail and institutional. There is only one main importer of a wide variety of seafood products. The importer purchases selected Canadian seafood items from importers in continental Europe because they are in a position to buy whole container loads from Canada.

POST PROPOSALS

Finnish fisheries experts predict the present catch level for wild salmon will prevail and prices will remain moderate. Rainbow trout farming has reached capacity and prices will remain competitive. The importation of salmon, except boneless fillets, is restricted by import permits which can be hard to obtain. Canned salmon is not produced locally and imports take place without restrictions. In 1989, 185 tons of salmon was imported, 109 tons from the USSR and 76 tons from Thailand. During the first few months of 1990, 190 tons of frozen salmon fillets were imported from Norway and 44 tons from Sweden, with the CIF price average approximately \$12.25 per kilogram. As long as the present market situation prevails it will be difficult to increase the market share of frozen Canadian salmon fillets in Finland.

FRANCE

SUPPLY AND CONSUMPTION

The 56.5 million people of France consumed 1.2 million tonnes of fisheries products in 1989. Estimated per capita consumption was 14.75 kilos of fresh fish, crustaceans and shellfish; 3.43 kilos of frozen fish and crustaceans; and 3.55 kilos of canned fish and crustaceans. The consumption of fish is a long standing but on-going tradition as most cities are in close proximity to ports. In 1990, France imported Cdn\$2.52 billion worth of fish products, including \$80.8 million from Canada. Canada ranks 10th among France's suppliers of fishery products. France represents the largest European market for salmon and smoked salmon.

HEALTH REGULATIONS

Salmon products entering the French market must be accompanied by a sanitary certificate (known officially as a "certificat de salubrite") made out by an inspector from Fisheries and Oceans Canada. Models of such sanitary certificates have been provided by the French authorities. On the certificates, the products must be designated by their Latin and official French names, and their place of origin must be indicated. All fish products are subject to inspection by veterinarians and by Customs and Fraud Prevention Service personnel when entering the country (see also Guidelines for Canadian Fish Exporters to France, EAITC/TAA 1992).

TARIFFS

Customs duties for salmon products entering the French market are: fresh (2 percent); frozen (2 percent); smoked (13 percent); and canned (5.5 percent).

POST PROPOSALS

Attempts have been made by Canadian salmon exporters to ship fresh salmon, mainly in the summer, but the post does not feel this sector will expand in the future. Total imports of frozen salmon increased in 1990, but Canada's market share is steadily shrinking. Most frozen product had previously been allocated to the smoking sector, but the post feels more could be marketed in France for processing into prepared dishes and for sale to supermarkets. The most desirable type of salmon for smoking purposes is troll caught coho, shipped cleaned with head removed, in cartons of 50, 100 or 200 pounds. Weight categories in pounds are 2/4, 3/5, 4/6, 6/9, 9/12 and 12/up. Other end-uses for French importers include steaks and fillets. Smoked salmon could be expanded to the French market if the price remains at a competitive level. Smoking techniques in France (cold smoking) must be taken into account by Canadian exporters, whether to make the same product or to market a new one (hot-smoked salmon, salmon jerky. Canned salmon exporters must realize the market is based on price in a relatively small consumer market, the product is not well known, and not all supermarkets carry the product.

Regarding promotion, Norway, Scotland and Alaska are all making vigorous efforts marketing in France. Norway and Scotland have product promotion offices in France, and spend substantial sums on advertising, especially in the form of television commercials. Some smokers advertise that their product is made from salmon that "has never been frozen", and is therefore obviously not of Canadian origin. Canadian activities of a similar nature are negligible in the market. One potentially attractive possibility might be for Canada to consider a combined generic promotion with Alaska, for example, which produces common salmon species. In addition, many French people think that Alaska is a part of Canada, or associate the state more clearly with Canada than with the U.S.

GERMANY

SUPPLY AND CONSUMPTION

The German market for salmon is supplied wholly by imports as Germany does not catch or produce salmon species. Pacific and Atlantic salmon are imported, with the latter largely sourced in Norway. Seventy percent of salmon imports are fresh/chilled product with most of the farmed salmon imported in fresh form. Approximately one-half of the imported salmon is smoked, with the remainder mainly sold fresh on ice. Quantities of salmon used in value added preparations are small, but growing.

Germany imports substantial quantities of smoked salmon and exports small quantities. Smoked salmon imports come primarily from Denmark, and represents a mixture of smoked Atlantic and smoked Pacific salmon. Total consumption has more than doubled during the period 1980-87. There has been static total consumption of fish in Germany, but as in other European markets, imports of smoked salmon have risen during this period from 714 tonnes in 1980, to 2,325 tonnes in 1987. The increase in consumption is attributed to imports of Atlantic farmed salmon.

German smokers buy 3-4 kilogram to 7-8 kilogram salmon, with a limited, but growing demand for 2-3 kilogram size as the market for small packs of slices increases. Sales are made to both the catering and retail sectors. Demand is highly seasonal with an estimated 30-40 percent of sales made during the last two months of the year, with another smaller peak during the Easter period. The increased consumption of smoked salmon has created year-round demand. The catering sector purchases largely whole sides of between one kilogram and 2.6 kilograms, while the retail sector purchases sides and packs of slices between 50 and 500 grams, with 200 gram packs dominating the market. Most smoked salmon is packed in vacuum packs. Prices for smoked salmon vary between DM48 per kilogram and DM75 per kilograms. Smoked salmon is sold under manufacturer labels, and by the retail brand by the major retailers.

The market in Germany is segmented by quality, with higher income consumers and quality restaurants purchasing the top quality Atlantic salmon, with consumption of Pacific salmon confined to the more price conscious consumers. Imported smoked salmon from Scotland and Norway tends to sell in the higher priced segment of the market. German salmon smokers vary in size, with approximately 80-90 percent of output originating from four large German companies serving the country, with smaller regional suppliers. The larger companies, and most of the smaller companies, source raw materials directly from the exporting country. Smokers operate their own distribution direct to retailers and caterers. Wholesalers are used mainly to serve smaller specialty retailers and catering outlets via general food wholesalers.

TARIFFS

Import duties for salmon products are: 2 percent for fresh/frozen salmon; 13 percent for smoked salmon; and 5.5 percent for canned. VAT rates are: 2 percent for fresh/frozen salmon and smoked salmon; and 9 percent for canned salmon.

HEALTH REGULATIONS

Salmon-like products which are not made of genuine salmon, or products made of fish not derived from certain species of sturgeon, are regarded as adulterated if there is no indication of the fact they are substitutes and preservatives have added. "Seelachs" [Pollock] must therefore, be marked as "Lachsersatz" (salmon substitute). In the case of fish roe products, the type of fish from which the roe was derived has to be stated.

Canned seafood products are allowed to contain preservatives, colouring agents and other additives which have been expressly approved for canning purposes. For certain seafood products such as marinated products, pastes, salted fish in oil, "Seelachs" in oil, roe products, and anchovy-type products, the following preservatives may be contained within the product:

1. Sorbic acid (E200-203)
2. Benzoic acid (E210-213)
3. Parahydroxybenzoic acid ethyl ester (E214-219)
4. Formic acid (E236-238)

Local salmon smokers use fresh smoke from natural wood. Salt petre (potassium or sodium nitrate) may also be used in the production of salmon products. The qualitative evaluation of fish and fish products is carried out in accordance with the Guiding Principles of the German Food Book. Even though actual laws are not represented, the book constitutes and explains recognized norms for the production, composition, evaluation and designation of salmon products.

POST PROPOSALS

For many Canadian companies, the secret to success, particularly in the highly competitive consumer market, is to identify and exploit a narrow market segment. To determine an appropriate niche, on-the-spot market research is virtually essential. Regional variations in consumer spending patterns are more marked in Germany than in many similar sized countries. Importers should always seek local advice to confirm whether the product is accepted well in a particular area. Domestic producers usually pick a "Nielson" area to test their product prior to launch.

Discussions with members of the trade suggest there are a number of ways in which salmon consumption is likely to increase:

- i) extension of fresh salmon sales in retail supermarkets and hypermarkets;
- ii) increasing the low frequency with which consumers buy fresh salmon to a higher rate of purchase;
- iii) increased salmon consumption in the South of Germany where consumption is relatively low;
- iv) erosion of the market share of Pacific salmon as Atlantic salmon prices fall;
- v) as supplies of quality salmon increase, interest may be stimulated for frozen convenience products. The German market for frozen prepared meals has grown by over 50 percent since 1980.

Overall prospects for the expansion of salmon in Germany are good. The German market has been dominated by Norwegian salmon, with the Scottish and Irish industries not having directed significant quantities to the market. However, both countries have favourable consumer images in the Federal Republic of Germany, and will be able to compete strongly with Norway. One of the main importers and distributors in Germany, **NORDSEE**, is part of the Unilever Group which owns Marine Harvest, the main Scottish salmon farming company, which should help facilitate Scottish entry into the market. The extensive marketing activities and large supplies from Norway. Competition from farmed Pacific salmon is not seen as a threat over the longer term, given the growing preference for Atlantic salmon in the smoking sector and the poor quality image of Pacific salmon.

GREECE

SUPPLY AND CONSUMPTION

1990 GREEK SALMON IMPORTS

0302.12	Pacific, Atlantic salmon, fresh/chilled	3,089kg
0303.10	Pacific salmon, frozen	1,244kg
0303.22	Atlantic salmon, frozen	108,000kg
0305.41	Pacific, Atlantic salmon, smoked	66,000kg
1604.11	Salmon, canned or preserved	21,000kg
TOTAL IMPORTS		199,333kg

Based on information from the trade, the total market for salmon in Greece is approximately 400 tons a year. There is only one smoking plant currently operating in Greece with a daily capacity of approximately 6 tons, but the plant is currently producing below capacity.

TARIFFS

For all forms of salmon the import duty is 2 percent, except for smoked, which is 18 percent for all non-EEC countries.

HEALTH REGULATIONS

All health regulations covering seafood imports to the Greek market are subject to the regulations outlined in the Presidential Decree 786/78 Regulations. Salmon exports to Greece must contain no more than 0.7 ppm of mercury. Imported salmon products can not contain any organochlorides, pesticides or heavy metals in quantities able to damage general consumer health. In addition, all salmon products imported into Greece must meet all requirements of decree No.#786/1.11.1978 of the Greek regulations. For all seafood exports to Greece, the FP1404 certificate is required, and must contain the following information and statement:

- a) method of preservation;
- b) starting date of preservation (for other than frozen or canned product);
- c) date of catch;
- d) date of freezing;
- e) freezing temperature;
- f) maintenance temperature;
- g) scientific name (Latin).

The above information must be given to the Greek Inspection Services by the producer (exporter) in writing. The producer's declaration is acceptable. The present certificate is issued in Greek, English or French, and cannot be issued more than 15 days in advance of shipment. In addition, the inspection stamp must be on every carton, box, or package of all frozen salmon products.

POST PROPOSALS

Local Greek salmon buyers have expressed concerns that Canadian salmon has a "breaking" problem related to Canadian catch methods, which in turn affects the appearance of the product, even after smoking. Canadian smoked salmon is roughly the same price as Scottish smoked salmon, and Scotland is Canada's largest competitor in Greece. Smoked salmon is generally considered to be a luxury item for the Christmas season, or is used for entertaining. Canadian salmon exporters could increase exports to the Greek market with distinctively Canadian promotions and marketing aimed at the key sectors of the economy.

IRELAND

SUPPLY AND CONSUMPTION

Since 1982 when only one hundred tons of salmon were produced, Ireland has doubled output every year, such that over 4,700 tons were sold in 1988. Ireland has projected output at approximately 15,000 tons. France continues to be the main customer for Irish farmed salmon, in addition to markets currently being developed in the United States and Japan. Eighty percent of Irish salmon production is exported in whole form as fresh or chilled, and markets are being developed for smoked salmon for which the demand is growing rapidly. Ireland also exports fair quantities of salmon cutlets in permeable skin packs to the US.

TARIFFS

The EEC tariff rates for fresh and frozen salmon products are 2 percent; 13 percent for smoked salmon products; and 5.5 percent for canned salmon.

HEALTH REGULATIONS

Prepacked salmon product food labelling requirements are based on EEC Directive 79/112, and must show the following information:

- * the name of product; the net quantity in metric units;
- * the date of minimum durability ("best before");
- * any special storage conditions or conditions of use; the name and address of the manufacturer or of a packager or seller based in the Community;
- * details concerning place of origin if the absence of this information might mislead the consumer;
- * instructions for use where necessary;
- * a list of ingredients under the heading "ingredients";
- * the name or business name and address of the manufacturer, packer or seller established within the EEC.

ITALY

SUPPLY AND CONSUMPTION

Italy represents one of the smaller, but not insignificant European markets for salmon. Both Atlantic and Pacific salmon are imported into Italy, with the former generally consumed fresh and smoked, and the latter used mainly for smoking. Smoked salmon is also imported, representing about 50 percent of smoked salmon consumption. The market purchases largely un-gutted salmon with a preference for 2-3 and 3-4 kilogram fish, larger salmon are difficult to sell. Salmon is a relatively new product on the market and sales have had little impact on the consumption of other species. The main competition for salmon will likely be from sea bass and sea bream. Sales are best in the period before the Christmas holiday season and during Easter. The ratio of sales is 60 percent catering, and 40 percent retail.

Smoked salmon is looked upon as a "must" food for catered parties, special occasions, and as a hors d'oeuvre in quality restaurants. Italy imports approximately 2,500 tonnes of frozen salmon each year, largely for smoking. The main source of supply is Canada (1,098 tons), followed by the U.S. (434 tons), and Denmark (203 tons). Prior to 1984, only small amounts of fresh salmon were imported into Italy, and a small amount of imported frozen salmon was thawed and sold as fresh. In the past few years, the market for fresh salmon has grown remarkably, increasing to 3,628 tonnes in 1988, with the main suppliers being Denmark (1,940 tons), Norway (906 tons) and Switzerland (637 tons). Most of the smoked salmon consumed in Italy is smoked locally using imported frozen salmon. An increasing quantity of salmon is being imported in smoked form, 2,360 tons in 1988. Imports of Canadian smoked salmon have steadily grown to reach a high of 57 tons in 1988. Limited interest in the Canadian smoked product is due to the Italian preference for European smoking methods, and because European packaging quality is superior.

Italian smokers purchase 1-2 kilogram up to 7-8 kilogram salmon. The market for smaller packs of slices is less developed than for whole sides. Vacuum packaging is the most common form of packaging, with a relatively small niche market in Italy. Sales are equally divided between the retail and catering sectors, but in both sectors, smoked salmon is generally an unfamiliar product for consumers, and current consumption is strongly biased towards the higher income groups in Northern Italy. Traditional taste preferences have been for hard smoked products based on imported sockeye salmon from wild Pacific landings, bright red in colour and strong tasting. The rise in availability of less hard smoked product and paler smoked Atlantic salmon is increasing. The higher quality retail outlets sell Atlantic smoked salmon. The market is seasonal with sales peaking during Christmas. Canada is the major supplier of canned salmon, followed by France and the USA.

TARIFFS

Import duties for salmon products are: 2 percent for fresh/frozen salmon; 13 percent for smoked salmon; and 5.5 percent for canned salmon. VAT rates are: 2 percent for fresh/frozen salmon and smoked salmon; and 9 percent for canned salmon.

HEALTH REGULATIONS

The standard Canadian Fisheries Service certificate of health is required for frozen product, and standard certificates of origin and mercury certificates (mercury content must be below 0.7 ppm) are required for all salmon products. A radioactivity certificate is required for salmon products from the Pacific coast. No special additives should be found in the product (other than salt, sugar, etc.) and if any are added, Canadian exporters should verify ahead with the importers. Labelling regulations are strict on imported products and labels must clearly list the following: the name of the product; the name or trademark of the producing firm; the location (city/town) of the firm; the location of the packing plant (codes are permitted if previously communicated to the Italian authorities); a list of ingredients in descending order based on weight or volume; net weight expressed in grams or kilograms; and the date of packaging (code permitted). Based on recent changes in labelling regulations, the Italian language is now required, and the label must show the expiry date for consumption. Consumer pack labels must include instructions for preserving the product, such as shelf life at various refrigeration temperatures. Canned products must show the net drained weight. Canadian exporters are urged to check labelling requirements carefully with Italian importers.

POST PROPOSALS

To avoid confusion based on language problems and the fragmentation of the local market, Canadian salmon exporters should work through a local Italian agent. First-time business should always be conducted on the basis of irrevocable letter of credit. There is rising optimism from North American salmon exporters selling to Europe and Japan, although Italy seems to be planning to smoke a larger share of farmed Atlantics rather than wild Pacific salmon. Italian smokers have large inventories (35-50 percent) of the 1988 troll salmon on hand, while fresh farmed Atlantics are 35 percent cheaper. In Italy, price is the name of the game. In addition, Atlantics beat out troll kings in 13 out of 14 vital marketing characteristics, such as colour, bruising, bacteria count, processing time, sizes, and recovery. Smoked salmon is no longer a gourmet item in Italy, the lower cost of Atlantic salmon has increased the market. The Canadian industry should support the Italian market with promotion programs, suggesting if the price were right and wild salmon were supported by a promotion program, sales of Canadian salmon to the Italian market would increase.

NETHERLANDS

SUPPLY AND CONSUMPTION

Salmon has not been harvested in the Netherlands in commercial quantities since the early part of the century when the salmon species were quite common in the river Rhine. In the absence of information on the salmon market from local sources, the following table was compiled from Dutch trade statistics and shows domestic disappearance.

DOMESTIC DUTCH DISAPPEARANCE

	1987	1988	1989
IMPORTS	2,594	2,686	3,240
Salmon, fresh/chilled	1,333	1,690	2,431
Salmon, frozen	1,261	958	772
Salmon fillets, fresh	--	14	15
Salmon fillets, frozen	--	24	22
EXPORTS	537	523	454
Salmon, fresh/chilled	260	175	260
Salmon, frozen	277	302	168
Salmon fillets, fresh	--	8	6
Salmon fillets, frozen	--	38	20
IMPORTS LESS EXPORTS	2,057	2,163	2,786
ADJUSTMENT FOR SMOKED SALMON	-62	-8	-193
DOMESTIC DISAPPEARANCE	1,995	2,155	2,593

The primary conclusion to be drawn from these statistics is that larger purchases of fresh/chilled salmon were responsible for the expansion of Dutch salmon imports over last three years. Dutch imports of frozen salmon, the trade category in which Canada traditionally has played a leading role, declined over the period. Norway has become the main supplier to the Netherlands.

Salmon is generally consumed fresh or smoked in the Netherlands. Imported frozen salmon has traditionally been used for smoking, but fresh salmon (from Norway) has increasingly been processed by smokers in recent years. There were twenty-two officially registered salmon smokers in the Netherlands in 1989.

The following paragraph highlights some general comments concerning the acceptance of Canadian salmon by the Dutch. Troll coho is the preferred salmon species from Canada, the higher quality of the species is in accordance with an increased demand for higher quality salmon. Chum is generally found to be a suitable species for the lower price range of the market. One local trader recently arranged direct contact with British Columbia fisherman, who upon request, began gutting the fish on board fishing vessels. The request has resulted in considerable quality improvement, particularly with regard to colour. When **sockeye** catches are good and prices competitive, significant quantities of sockeye have been purchased by Dutch smokers. Price and quality are the leading considerations by the Dutch when purchasing Canadian sockeye. **Pink** salmon is also of interest to smokers in the Netherlands, demand is for sizes larger than 5 pounds only, with a preference for troll pinks. **Red King** receptiveness has been negligible in the Netherlands, largely due to the colour inconsistency of the species.

Until recently, salmon was considered a luxury product in the Netherlands, whether consumed fresh or smoked. The increased availability of low priced farmed salmon from Norway has caused many restaurants to offer salmon dishes at prices which compete favourably with meat dishes. Fresh salmon has gradually lost its status due to its image as a costly specialty item. Smoked salmon continues to be regarded as a luxury item owing to the high cost in both restaurants and retail outlets.

HEALTH REGULATIONS

For any information concerning health regulations, product specifications, labelling, and marking standards or other current specifications contact:

**Keuringsdienst voor Waren (Food Inspection Service)
Prinsengracht 50 Hague
The Netherlands**

PORTUGAL

SUPPLY AND CONSUMPTION

Although a relatively small country, Portugal is one of the EEC's largest seafood consumers with per capita fish consumption of 40.6 kilograms in 1989. The country is a stable and somewhat conservative market with a well established demand for a number of different products and product forms; salt cod, unprocessed frozen fish, fresh fish and shellfish. The Portuguese domestic fleet supplies approximately 65 percent of seafood requirements in the local market.

Salmon is however one of the few species for which consumption has traditionally been very modest, due essentially to pricing problems. Portugal has virtually no salmon resources, and although the country has an aquaculture industry, it is of little significance (2 farms producing not more than a total of 180 tonnes of salmon per annum). Until quite recently, only smoked salmon was available on the Portuguese market. Essentially due to the introduction of farmed Atlantic salmon from Norway, the species is now found in fresh, and to a much lesser extent, frozen forms at supermarkets in the major Portuguese cities (notably Lisbon and Porto), and is served in many restaurants at prices that compete with meat dishes.

The volume of salmon imported by Portugal increased by 99 percent in 1990, to give a total import market size of 194.2 tonnes (valued at \$1.6 million Canadian), of which 103.4 tonnes consisted of salmon in fresh/chilled form; 50.2 tonnes in frozen form; 15.7 tonnes in smoked form; 2.5 tonnes in salted state; and 22.4 tonnes in live state for the aquaculture industry. Purchases of fresh/chilled salmon increased by 191 percent accounting for 47 percent of the total import market by volume and 55 percent by total value. Norway is reported to be the main source of supply for the fresh/chilled product, although the Portuguese import statistics do not reflect the volume of salmon originating from Norway, as substantial quantities of Norwegian salmon are coming into Portugal by transshipment through Spain. In so far as smoked salmon is concerned, Portugal has traditionally obtained virtually all of its modest requirements from Denmark and France.

The salmon market in Portugal at this point in time can therefore be described as being relatively limited in absolute size, but in a phase of rapid development. The demand for the species, notably in the fresh form, will continue to grow as Portuguese purchasing power becomes stronger and consumption spreads from the Lisbon and Porto areas to other regions of the country. The frozen fish market is currently growing in Portugal and salmon is expected to become a more dynamic species in this market. Portugal's domestic market provides a challenge and an opportunity for Canadian salmon exporters to introduce a high quality product at reasonable prices.

Fresh or chilled salmon is generally imported into Portugal in 1 kg, 2-3 kg, 4-5 kg, and 6-7 kg sizes, with a preference for the 5/6/7 kg sizes. Fresh farmed Norwegian Atlantic salmon arrives head-on, un-gutted, and packed in 20-22 kilogram plastic boxes. The current wholesale prices per kilogram are approximately Esc.1,000 for 2-3 kg sizes; Esc.1,200 for 4-5 kg sizes; and Esc.1,300 for the 6-7 kg sizes. Fresh salmon is purchased by Portuguese importers who sell the product to wholesalers, who in turn re-sell it to the supermarkets, restaurants and hotels. Fresh and chilled salmon is also used for smoking, but there are currently only two salmon smokers in all of Portugal.

Frozen salmon imports are generally in sizes and packing similar to fresh/chilled salmon products. Portuguese importers prefer 4-5 kg sizes, with head-off, and gutted. The bulk of the imported frozen salmon goes to the hotel/restaurant sector and frozen fish retail sale outlets. Buyers are principally importers and distributors. Danish frozen salmon was recently quoted at Danish Krona 53 per kilogram C.I.F. Lisbon. Opportunities for imports of salmon fillets in both frozen and fresh forms are negligible. As a rule, imported Danish smoked salmon arrives in Portugal sliced, packed in boxes containing 10x2.2 kg flat pieces each. The product is purchased by Portuguese importers who sell it to the specialty food retail outlets and the restaurant/hotel sector. The current price for the Danish smoked salmon is reported to be selling at approximately Danish Krona 160 per kilogram C.I.F. Lisbon.

PORTUGAL SALMON IMPORTS

	(Tons)	1988	1989	1990
Live, Atlantic		--	27.0	22.4
Fresh/chilled		21.4	35.5	103.3
Frozen, Pacific		3.3	21.9	24.7
Frozen, Atlantic		40.7	2.3	24.9
Fillets, fresh or chilled		--	--	0.1
Fillets, frozen		--	--	0.6
Smoked		12.6	10.8	15.7
Salted		--	--	2.5

POST PROPOSALS

One challenge for Canadian salmon exporters is to identify the Portuguese importers and distributors who would be interested in handling promotional activities and after-sales service of Canadian salmon products. Canadian exporters should attempt to increase the exposure of various Canadian salmon species as a symbol of high quality products. The Portuguese market should be targeted at the trade and industry levels. Trade Commissioners in Lisbon feel the Canadian Association of Fish Exporter's "**Seafood Canada**" could be used as a good vehicle for dissemination of pertinent information on Canadian salmon products. Canadian firms are invited to attend the seafood trade fair **EXPOMAR**, scheduled to be held on November 18-22, 1992. The Canadian Embassy in Lisbon would be happy to provide appropriate names and addresses of Portuguese salmon importers and distributors to Canadian salmon processors/exporters.

SPAIN

SUPPLY AND CONSUMPTION

Spain has the largest fishing fleet in the EEC, with landings of approximately one million metric tons per year. Imports of fish products continue to increase steadily reaching 715,000 metric tons, valued at over \$2 billion in 1987. Total annual domestic consumption of seafood is 1.4 million metric tons, equal to 36 kilograms per person, the second highest seafood consumption in the world next to Japan. Spanish imports of fresh salmon in 1989 totalled 19,918 metric tons, with Norway supplying 9,106 metric tons and Canada supplying none. Spain did however purchase 52 metric tons of frozen Pacific salmon from Canada; 3 metric tons of frozen Atlantic salmon; and one metric ton of both smoked salmon and canned salmon.

Marketing initiatives by Norwegian suppliers in Spain during recent years have been persistent and highly successful. Product is delivered by air transport and has an additional advantage because fresh salmon is imported at a lower tariff rate than frozen. The Spanish market for salmon has given preference to farmed Norwegian salmon which is either sold as steaks, or smoked by Spanish salmon producers.

TARIFFS

Imported salmon products entering the Spanish market are subject to the following tariff rates: fresh salmon, Canada 1.3 percent, the EEC nil; frozen salmon, Canada 6.2 percent, and the EEC 4.9 percent; smoked salmon products, Canada 13 percent, and the EEC 4.1 percent; and for canned salmon, Canada 11.6 percent, and the EEC 6.1 percent.

SWITZERLAND

SUPPLY AND CONSUMPTION

Total Pacific salmon imports to the Swiss market were 1,010 metric tons during 1989. Canada was the primary supplier to Switzerland, with total exports equal to 684 metric tons, and a market share of 64 percent. Total Atlantic salmon imports to the Swiss market were 655 metric tons, and Canada supplied 99.7 metric tons for a market share of 15 percent. The primary supplier of Atlantic salmon was Denmark at 308 tons, followed by Norway with 95 tons. Total smoked salmon imports were 387.8 tons during 1989, of which Canada supplied 9.3 tons, for a market share of 2.4 percent. Canned salmon imports to Switzerland totalled 96 tons in 1989 of which Canada supplied 31.8 tons for a market share equal to 33 percent.

Headless chum (silverbright) accounts for 90 percent of total imports of frozen salmon originating from Canada and destined for the Swiss market. The products are primarily distributed to the retail and hotel trade, and are generally imported in 40 or 20 foot containers. The retail trade accounts for 60 percent of Pacific salmon sales with the restaurant trade accounting for the remainder. During 1989, total imports of salmon to the Swiss market dropped by 30 percent, while imports from Canada dropped by 48 percent. Norwegian farmed salmon, which is generally imported fresh, has lost some of its acceptance in the Swiss market gained over the past few years. This is due to the fact that too many antibiotics were found in the products. Swiss salmon smokers prefer to do their own smoking on-site, often in small private smoke houses based on the individual tastes and preferences of their customers.

TARIFFS

Salmon can be imported duty free by licensed importers in Switzerland. No import permit is required, but imports are subject to a veterinary control for which there is a tax of 4 Swiss francs per 100 kilos gross weight.

HEALTH REGULATIONS

Processed fish products, including smoked salmon, require a public health certificate for the importation of fish, crustaceans, molluscs, sea urchins and other fishery products. Shipments which not accompanied by a health certificate will be refused entry. Swiss authorities request that salmon imports must have the content of listeria monocytogenes bacteria controlled. If controls test positive twice (content of bacteria has been proven), the supplier will be entered on the "black list". The Swiss importer is informed of the actions and must advise the authorities and his supplier, that all future shipments from the particular supplier, must be accompanied by a certificate stating the shipment has been controlled and is free of listeria monocytogenes bacteria.

UNITED KINGDOM

SUPPLY AND CONSUMPTION

The United Kingdom is generally a good market for seafood imports, and salmon in particular. The main problem facing Canadian salmon exporters is competition. The competitors with an advantage in the UK market are the Scottish and the Norwegians. The canned salmon market is a different situation based on the relative high cost of farmed salmon, which precludes use by the UK canning industry. One positive factor for Canadian salmon exporters was the strong promotional activities of the Scottish Salmon Growers Association (SSGA), which created excellent consumer awareness of salmon products. Despite these efforts by the Scottish salmon industry, there is little evidence it created consumer loyalty to Scottish salmon. The promotion targeted fresh fish. The main competition for pink salmon in the UK market appears to be tuna, thus price appears to be a determining factor. Red salmon enjoys a separate market segment at the higher end of the market.

The domestic UK salmon smoking sector enjoys a competitive advantage for smoked salmon imports because of a 13 percent tariff, and total imports were 54 tons, half of which were sourced from Ireland. The main opportunities for Canadian salmon exporters exist in supplying frozen salmon for the smoking industry, which only has a two percent tariff. Nevertheless, there are tangible competitive advantages for Canadian salmon exporters, including a cachet for wild salmon. Twice the quantity of salmon is sold as wild salmon of UK origin than is actually landed, which indicates a sales advantage for wild salmon. There appears to be a general ignorance of Pacific salmon species in the UK market, other than the "generic" Pacific labels which sell cheaper than Atlantic products. There are good prospects in the UK market for Canadian canned salmon products. Canadian strengths include the relatively large size of the Canadian industry, and the high levels of quality control. Direct competition mainly comes from the United States, and the US has targeted export enhancement funds for the promotion of salmon in the UK market. At the consumer level, there is little awareness of whether the product is of American or Canadian origin.

TARIFFS

There is a 13 percent import tariff on smoked salmon products, and a two percent tariff on frozen salmon products.

EASTERN EUROPE

POLAND

SUPPLY AND CONSUMPTION

The local market in Poland is estimated by the Post to be approximately 500 tons for 1991, and is comprised of Scandinavian farmed salmon; Russian pink from Kamtschatka; and Canadian Pacific (20 tons). The retail price for smoked salmon on the local market is \$10-15 US per kilogram, depending on the season and origin. Salmon is viewed as a luxury food in contrast to beef at \$4 US per kilogram; pork at \$5 per kilogram; cooked ham at \$7 per kilogram; and other fish species like carp (\$3 per kilogram) and perch (\$5 per kilogram). There are dozens of local seafood importers which are no longer under government control. Imports of salmon from Russia is a recent development, but species obtained from these regions are considered inferior to Canadian salmon products. Most of the market is made up of locally smoked salmon or imported product, with only limited amounts of fresh available during the season on the Baltic.

TARIFFS

All restrictions on the importation of salmon products to Poland, except tariffs, were lifted two years ago. The import duties are: fresh 5 percent; frozen 10 percent; smoked 15 percent; and fillets 10 percent.

HEALTH REGULATIONS

No local health regulations apply to imported salmon other than the veterinary certificate required by Canadian exporters.

POST PROPOSALS

The post believes the local market for salmon products will remain somewhat limited based on competition from lower priced pork and ham. Polish average income is only \$250 US per month and consumers view salmon as an expensive luxury product. However, Canadian salmon exporters may be able to penetrate the market by targeting the high-end deli and restaurant sectors. Properly organized promotional endeavours aimed at hotel/restaurant sector of the economy could increase Canadian exports of salmon products to the Polish market.

MIDDLE EAST

ISRAEL

SUPPLY AND CONSUMPTION

Seafood consumption per capita in Israel is estimated at 13.2 kilograms per capita. The breakdown is as follows: frozen fish 5.9 kilograms; deep-sea fish 1.3 kilograms; canned 2.2 kilograms; and freshwater 3.8 kilograms.

The domestic Israeli market for salmon is very small. Exports of Canadian salmon to Israel in 1990 amounted to 29 tonnes, mainly frozen whole or fillets. Salmon, frozen whole, fillets, smoked and canned, are relatively new products to the Israeli market and are considered luxury items. In recent years local firms have begun smoking salmon and are now competing against imported smoked salmon products, mainly from Norway. Approximately 40 tonnes per annum of salmon are imported for smoking, and the preferred species is chum. The prime consideration is price. The trend in the market is upwards with an estimated growth potential of 20 percent per annum.

Israel imposed a quota of 3,000 tonnes on whole frozen fish imports to protect the Israeli industry, but the quota does not apply to fillets. The importer must deal with the Kashrut (dietary laws) requirements. The main demand is for salmon weighing between 900 grams to 1.5 kilograms for whole fish, and 2.5 to 4 kilograms for fillets. Consumer prices for frozen salmon are as follows: \$9 Cdn per kilogram for whole fish; and \$17 per kilogram for fillets in vacuum packs. Most of the chain food stores in Israel work on a high profit margin of approximately 100 percent.

Canned salmon from Canada has appeared on the market only this past year. Annual consumption in Israel is approximately 40 tonnes. Wholesale prices are between US\$ 1.15 to 1.25 per 200 gram can C.I.F. Consumer prices are US\$ 2.65 per 200 gram can. Canadian pink salmon competes against the cheaper Far East salmon products.

There is a general lack of awareness in this market as to the different kinds of salmon available from Canada. The local consumer must be "educated" about Canadian salmon possessing a superior quality, however, prices must come down to increase Canadian market share. As a result of an outgoing Canadian trade mission that visited Israel last October, various British Columbia salmon products are now available on the local Israeli consumer market.

TARIFFS

The import duty on frozen salmon products entering Israel is \$313 NIS (New Israeli Shekel) per metric tonne [\$1 Cdn equals approximately \$2 NIS]. There are no import duties on fish products imported for industrial usage, and the import duty on canned salmon products is 0.51 NIS per kilogram.

HEALTH REGULATIONS

The Israel Public Health Regulations (1970) requires that labels for salmon products must include: the name of the product; the name of the fish from which the product was prepared; the name and address of the producer; the name and address of the importer; and the word "**KOSHER**" if the owner or importer is in possession of a certificate from the Chief Rabbinate of Israel; or the words "**NOT KOSHER**" if the producer or the importer is not in possession of such a certificate. Acceptable tolerances and guidelines are as follows for salmon products: TBA 2.5mg per gram; TVBN 25mg per 100 grams; mercury 0.5ppm (one sample may be up to 1.0 ppm, but average must not exceed 0.5ppm); and Histamine 200 ppm.

Certification requirements in Israel require that salmon imports must be accompanied by a Certificate of Inspection, Origin and Hygiene (FP 1404). In addition, the certificate must have the following statement added: "Based on analysis of samples randomly selected from the lot, the average TVBN content has been determined to be less than 25mg per 100 grams".

CANADIAN TRADE OFFICES

ATLANTA

Canadian Consulate General
Suite 400, South Tower,
One CNN Center,
Atlanta Georgia 30303-2705
Tel:(404) 577-6810
Fax:(404) 524-5046

AUSTRALIA

Canadian Consulate General
8th Floor, A.M.P. Centre,
50 Bridge Street
Sydney, N.S.W. 2000
Tel:(011-61-2) 231-7022
Fax:(011-61-2) 223-4230

AUSTRIA

Canadian Embassy
Dr. Karl Lueger Ring 10,
A-1010 Vienna
Tel:(011-43-1) 533-3691
Fax:(011-43-1) 535-4473

BELGIUM

Canadian Embassy
2, avenue de Tervuren
1040 Brussels
Tel:(011-32-2) 735-6040
Fax:(011-32-2) 735-3383

BOSTON

Canadian Consulate General
Three Copley Place, Suite 400,
Boston, Massachusetts 02116
Tel:(617) 262-3760
Fax:(617) 262-3415

CHICAGO

Canadian Consulate General
Two Prudential Plaza
180 North Stetson Avenue, Suite 2400,
Chicago, Illinois 60601
Tel:(312) 616-1860
Fax:(312) 616-1877

CLEVELAND

Canadian Consulate
Illuminating Building,
Suite 1008,
55 Public Square,
Cleveland, Ohio 44113-1983
Tel:(216) 771-0150
Fax:(216) 771-1688

DALLAS

Canadian Consulate General
St. Paul Place, Suite 1700,
750 North St. Paul Street,
Dallas, Texas 75201-3281
Tel:(214) 922-9806
Fax:(214) 922-9815

DENMARK

Canadian Embassy
Kr. Bernikowsgade 1,
DK=1105 Copenhagen K
Tel:(011-45-33) 12-22-99
Fax:(011-45-33) 14-05-85

DETROIT

Canadian Consulate General
600 Renaissance Center
Suite 1100,
Detroit, Michigan 48243-1798
Tel:(313) 567-2085
Fax:(313) 567-2164

FINLAND

Canadian Embassy
Pohjois Esplanadi 25 B,
P.O. Box 779,
00100 Helsinki
Tel:(011-358-0) 171-141
Fax:(011-358-0) 601-060

FRANCE

Canadian Embassy
35, avenue Montaigne
75008 Paris, France
Tel:(011-33-1) 47.23.01.01
Fax:(011-33-1) 47.20.19.44

GERMANY

Canadian Consulate General
Immermannstrasse 65 D,
4000 Düsseldorf 1,
Tel:(011-49-211) 35-34-71
Fax:(011-49-211) 35-91-65

GREECE

Canadian Embassy
4 Ioannou Ghennadiou Street
11521 Athens
Tel:(011-30-1) 723-9511
Fax:(011-30-1) 724-7123

HONG KONG

Commission for Canada
13th Floor, Tower 1,
Exchange Square,
8 Connaught Place,
G.P.O. 11142,
Hong Kong, Hong Kong
Tel:(011-852) 847-7414
Fax:(011-852) 847-7441

IRELAND

Canadian Embassy
Canada House,
65 St. Stephen's Green,
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Fax:(011-353-1) 78-12-85

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Fax:(011-972-3) 527-2333

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00161 Rome
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Fax:(011-39-6) 884-8752

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Canadian Embassy
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Tokyo 107
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Fax:(011-81-3) 3470-7280

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Tel:(213) 687-7432
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Apartado Postal 105-05,
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New York, New York 10020-1175
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00-481 Warsaw
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Fax:(011-48-22) 29-64-57

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Avenue Da Liberdade 144/56-4,
1200 Lisbon
Tel:(011-351-1) 347-4892/6
Fax:(011-351-1) 347-6466

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Sixth and Stewart Streets,
Seattle, Washington 98101-1286
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Canadian High Commission
IBM Towers, 14th Floor,
80 Anson Road,
Robinson Road P.O. Box 845,
Singapore 9016
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Fax:(011-65) 225-2450

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Canadian Embassy
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45 Mugyo-Dong, Jung-Ku,
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Tel:(011-82-2) 753-2605/8
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Apartado 587,
28080 Madrid
Tel:(011-34-1) 431-4300
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CH-3000 Berne 6
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Fax:(011-41-31) 44-73-15

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Taipei
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P.O. Box 2090,
Bangkok 10500
Tel:(011-66-2) 237-4126
Fax:(011-66-2) 236-7119

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Canadian High Commission
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One Grosvenor Square,
London W1X 0AB
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Fax:(011-44-71) 491-3968

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Fax: (506) 857-6429

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Tel: (403) 495-2944
Telex: 037-2762
Fax: (403) 495-4507

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Fax: (403) 292-4578

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Affaires extérieures et Commerce extérieur Canada et Industrie, Sciences et Technologie Canada ont créé les **Centres de commerce international (CCI)**. Ces centres, que l'on retrouve partout au Canada, ont pour but d'aider les exportateurs canadiens, qu'ils en soient ou non à leur première expérience dans le domaine des échanges internationaux. Les Centres peuvent leur procurer des publications spécialisées, les inviter à participer à des foires commerciales ou à des délégations, leur offrir une vaste gamme de services et, notamment, les conseiller en matière d'exportation, de transfert de technologie et de création de coentreprises avec des investisseurs étrangers. Vous pouvez obtenir de plus amples renseignements en vous adressant au Centre le plus proche. Le bureau de renseignements sur les exportations d'Affaires extérieures et Commerce extérieur Canada, qui se trouve à Ottawa, peut également vous offrir des conseils utiles; on le joint sans frais en composant le 1-800-267-8376 (ou le 993-6435 pour les résidents d'Ottawa).

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Télécopieur : (709) 772-2373

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Télex : 014-2200
Télécopieur : (506) 857-6429

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C.P. 247
Tour de la Bourse
800, place Victoria, bureau 3800
Montréal (Québec)
H4Z 1E8
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Télécopieur : (514) 283-3302

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Centre de commerce international
105, 21^e rue est
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S7K 0B3
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Regina (Saskatchewan)
S4P 2N8
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Centre de commerce international
Édifice Dominion, 4^e étage
1, rue Front ouest
Toronto (Ontario)
M5J 1A4
Tél. : (416) 973-5053
Télex : 065-24378
Télécopieur : (416) 973-8161

ALBERTA

Edmonton
Centre de commerce international
Pièce 540, Canada Place
9700, avenue Jasper
Edmonton (Alberta)
T5J 4C3
Tél. : (403) 495-2944
Télex : 037-2762
Télécopieur : (403) 495-4507

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Centre de commerce international
Bureau 1100
510, 5^e rue S.O.
Calgary (Alberta)
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If you are seeking advice and information about a specific area or country, Trade Commissioners in the **Geographic Trade Divisions** are available to assist you. They are located at 125 Sussex Drive, Ottawa, Ontario, K1A 0G2 [Fax:(613) 996-9103].

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