BRITISH COLUMBIA SALMON FARMERS

TRADE MISSION TO THE BOSTON SEAFOOD SHOW AND FULTON FISH MARKET

MARCH 5 TO 12, 1989

External Affairs and International Trade Canada

Canada

British Columbia Salmon Farmers Trade Mission to the Boston Seafood Show and Fulton Fish Market March 5 to 12, 1989

A Report to the United States Trade and Investment Development Division and the Fisheries Division External Affairs and International Trade Canada

Prepared by
Don Tillapaugh
Kanish Aquafarms Ltd.
Heriot Bay, British Columbia
Keith Ware
Quality Seafarms Ltd.
Campbell River, British Columbia

External Affairs and International Trade Canada
Affaires extérieures et Commerce extérieur Canada

Acknowledgements

The B.C. Salmon Farmers Association would like to thank External Affairs and International Trade Canada (EAITC) for funding and arranging the mission. The delegation extends its sincere thanks to Bob Steinbock of the Fisheries Division of EAITC, and Jack McManus and Nilo Cachero of the Canadian Consulate General in Boston for all their assistance and support of the investigation. We believe that the co-operation between government, independent farmers and the BCSFA is a valuable asset to learning the required steps needed to successfully promote Canadian products.

(Publié également en français)

Contents

LIST OF APPENDICES

Background

The British Columbia salmon farming industry is a dynamic new growth industry in the province which has expanded extensively since 1985. Development of successful husbandry practices and integration with appropriate technologies have allowed B.C. entrepreneurs to increase production from 100 metric tons in 1985 to 6 000 metric tons in 1988. Production for 1989 is estimated at 14 500 metric tons. While production in B.C. has been growing at a rapid rate, so has production from other salmon-producing countries. This has resulted in an oversupply in world markets and a decline in the price of farmed salmon from all countries of origin (see Appendix A).

In view of the general decline in world prices for farmed salmon due to oversupply (see Appendix B), an inefficient marketing and distribution system in B.C., profit taking in the distribution system, and a disincentive to develop new markets and maintain or increase prices, a group of independent salmon farmers joined together in February 1989 to explore ways and means to co-operate in lowering costs of production and increasing sales prices through co-operative selling. The members of the group were:

FARM	*REPRESENTATIVE*
Kanish Aquafarms Ltd.	Don Tillapaugh
Norent Inc.	Kjell Aasen
Quality Seafarms Ltd.	Keith Ware
Quartz Bay Seafarms Ltd.	Derek Sharpe
Conville Point Seafarms	Paul Tate
RSR Seafarms Ltd.	Rolf Aunet
Saltstream Engineering Ltd.	Rob Smeal

Together these seven companies produce in excess of 2 000 metric tons annually which is a significant volume to support marketing and sales efforts.

Trade Mission Proposal

Alan Archibald, Director of Marketing for the B.C. Salmon Farmers Association (BCSFA) was invited to the February 5, 1989, meeting of the independent farmers in the Campbell River area to discuss the "crisis" in sales prices and potential solutions. At the meeting Mr. Archibald noted that funds were available through External Affairs and International Trade Canada, to support a trade mission to the Boston Seafood Show. He suggested that participation in the show would help the group achieve some of their identified needs including:

1. an increased awareness of seafood sales and distribution;
2. the development of marketing ideas;
3. the establishment of buyer contacts; and
4. the gathering of much needed market intelligence.

These then became the objectives of the trade mission.

Arrangements were made with External Affairs and International Trade Canada identifying the group and the contact person Don Tillapaugh. Plans were set within two weeks. Because of time constraints, the salmon farmers felt that seven days was the maximum time available for the mission. Allowing two days for travel, it was felt that the emphasis should be placed on the Seafood Show because all the major buyers would be in attendance. Following the show, part of the group planned to visit the Fulton Fish Market in New York while others planned to investigate commercial/retail sales and distribution in the New England area. Prior to departure, a letter of introduction and an invitation to meet the group at the Boston Seafood Show (see Appendix D) was sent to a number of potential contacts provided by External Affairs and International Trade Canada. To adequately cover the show and be available for buyer contacts at the BCSFA booth, the group was divided into three subgroups.

Boston Seafood Show

The Boston Seafood Show is the world's largest seafood trade show. Held in the Hynes Convention Center and occupying two entire floors, 800 exhibitors from some 25 countries occupy over 1 000 booths to display their products to more than 20 000 seafood buyers. Fifty to sixty per cent of the seafood business in the United States is done through Boston.

The general feeling among the B.C. salmon farmers after the first day at the Boston Seafood Show was of depression because British Columbia salmon lacked a presence at the show. Certainly the BCSFA had a single booth but, standing alone, it commanded little attention. The other major salmon-farming areas of the world had large, highly impressive displays. The photos in Appendix E demonstrate the marketing efforts of B.C.'s competitors. Norway, the world leader in farmed salmon production, had three entire aisles of display area. To attract attention they offered to check blood cholesterol levels of attendees. Their displays were second to none and they had private enclosed areas for completing deals. The Scottish Salmon Board had an attractive booth with a man outfitted in traditional kilt and highland garb, cooking their products for interested buyers. The Chileans, who produce about the same amount of salmon as B.C., had an entire aisle with a triple booth at the end. The Irish salmon farmers also had a very high-profile national display.

British Columbia was represented by the BCSFA, B.C. Packers, J.S. McMillan Fisheries, Calkins and Burke, and Royal Pacific Sea Farms Ltd. Each B.C. farmed salmon company had an individual booth while competitors from other countries all displayed side by side under their national banner and in doing so created a real presence. If, for example, a buyer wanted to purchase Chilean farmed salmon, the Chilean

aisle could easily be located and then the best deal could be made with one of the many separate companies displaying there. Conversely, to find B.C. farmed salmon, a potential buyer had to search the entire area equal to three football fields of booths on two floors to find the five individual booths promoting B.C. salmon. As a result, B.C. farmed salmon received little attention.

Competing countries displaying cultured salmon for sale emphasized two principal messages — pristine natural rearing environment and high-quality product. The BCSFA booth, while having attractive glossy pictures as a backdrop, presented a different message — technology and biology. It was felt that this message was misdirected for the purpose of selling fish.

Value-added products were displayed in a wide variety of forms beside fresh whole salmon in the BCSFA booth. Products ranged from simple cuts of steaks and fillets and individual portion packs of fresh fish to smoked, seasoned and packaged products in a variety of forms. The pictures in Appendix F show a selection of products available. One member of the delegation suggested the variety of value-added products available was fairly standard and that there should be more creative products.

Several companies displayed the packaging technologies available. One company, Trygon, had a machine operating to package fish at the show. It created quite a stir when steaks and fillets from some B.C. farmed salmon brought to the show for display, were packaged on-site. The deep red colour of the flesh attracted considerable interest. The colour is not evident in a whole fish (even by belly inspection) until it is cut. When the packaged products were placed on display in the booth beside the whole fish, buyer attention immediately increased. The picture below shows the B.C. fish display.

The rich flesh colour can easily be compared with the products shown in the photos of international competitors in Appendix E. In markets where "redder is better," B.C. salmon easily surpasses Atlantic salmon.

Price was the first consideration of all the buyers surveyed. Salmon, which is in oversupply, is trading as a commodity and is subject to "the market." The "market" is a mind-set of the people in the seafood distribution system which responds, not to what is necessarily actual, but to what is perceived. It is a business which is rife with rumours, a great deal of misinformation, a lot of second-hand information and a little accurate information. This all works together towards "talking the price down." The B.C. group are farmers and "hands-on" managers who take great pride in producing quality fish and are voluntary members of the B.C. Salmon Farmers Association Quality Assurance Program. It was difficult for them to accept that quality did not obtain premium prices as expected in the marketplace. Further, another hallmark of aquafarming, reliable supply, was seriously discounted because there are now so many farmed salmon suppliers. The bottom line is that quality and reliable supply are, at most, worth only $0.05 in the marketplace for fresh farmed salmon and if the price drops any further it will be necessary to renegotiate or lose a customer.

New England Area

After the Seafood Show ended, there was a brief opportunity to explore retail supermarkets and delicatessens in the area surrounding Boston. In the supermarkets (e.g. Stop and Shop), there appeared to be a general lack of salmon available, especially Pacific salmon, indicating some market potential. Delicatessens sold smoked salmon of various types (for bagels and lox) and the price, usually, was very expensive ranging from US$13.00 to $18.00 per lb. (450 g). Deli owners surveyed were happy with the salmon products they had and were not generally open to suggestions about smoked Pacific salmon.

On two occasions we observed Atlantic salmon being sold as Atlantic Kings. This was a definite misnomer but it turned out that the company selling Atlantic salmon was called Atlantic King.

The eastern seaboard is a target market for Atlantic salmon from Norway. The Norwegian Fish Farmers Sales Organization has opened an office in New York and allocated a budget of $1 million to develop this market. Currently, the Norwegians are able to sell a 3 kg Atlantic in New York or Boston more cheaply than an equivalent King salmon from B.C. Although there were some mixed signals, it appears that the northeastern U.S. prefers Atlantics over Pacifics. The general conclusion among the group was that B.C. marketing efforts might better be directed to areas other than the eastern seaboard at this time.

Fulton Fish Market

In addition to researching the Boston Seafood Show and area, three members from the BCSFA delegation and trade commissioner Bob Steinbock of the Fisheries Division, External Affairs and International Trade Canada visited the Fulton Fish Market in New York. The objective was to learn about the operations of the Fish Market in general and in particular its possibility as a channel for sales of fresh Pacific salmon. The group met with Richard Lord, a representantive of collective sellers of the fish market, and other representatives and toured the area. (A selection of Fulton Fish Market Companies appears in Appendix G.)

The Fish Market is a wholesale seafood market with 70 wholesalers. It is located on South Street in lower Manhatten. Open from 4 to 8 a.m., it sells mainly to day distributors who arrive at 4 a.m., buy their required products through selective shopping, load onto trucks, and usually start their deliveries by 6 or 7 a.m.

The market was originally a direct-delivery dock for local fish boats. Later there was a live holding complex that kept fish in nets in the river beside the market but pollution has stopped any live holding of fish. Further, boat delivery has ceased because of present-day commercial water travel logistics and all products are now brought in by truck. The market has been in general decline in terms of volume, quality and general demand for some years now. Discussion is underway to build a new and more acceptable facility in a better location.

The group arrived at the market early in the morning and were surprised by the lack of hygiene and circa 1900 marketing methodology. Fish were brought out from coolers in the morning, boxes were stacked haphazardly in front of the market and the occasional box was open for inspection. Fish were left in the open air or sitting in water for at least the 2 or 3 hours when the group was there. In general all fish were handled roughly and carelessly and even fish that were dropped on the dirty floor were gaffed and flung back into a box.

Of special note was some B.C. farmed fish. Processing dates on the box indicated it had been processed 14 days earlier. The gills were still in and were white and covered with mucus. They were and looked like they had been sitting for days in 10 cm (4in.) of water with minimal ice left. Scale loss was severe. Surprisingly, the meat quality appeared acceptable and vendors at the market commented on two occasions that Pacific salmon kept better than Norwegian salmon. If anyone should know about holding fish for long periods of time, it would be the vendors at the Fulton Fish Market.

Pacific salmon at the Fulton Market were being sold at $0.35 to $0.40 per lb. (450 g) less than Norwegian salmon. Buyers at the market did not appear sophisticated in their knowledge nor particular about the quality. They wanted cheap fish and that is what they got. The "best buy" was a 14-day-old, 2 to 4 lb. (900 to 1800 g) gill-in Pacific salmon.

Norwegian farmed salmon was available in relatively large volumes. At least four companies were noted. The companies at Fulton said they used Norwegian fish because of reliable delivery, consistent supply, good packaging and large size of fish.

Salmon sales accounted for less than five per cent of all fish sales and salmon did not appear to be a specialty item or highly regarded.

Considerable secondary processing was being done in the back of many shops. Filleting and steaking was common.

Recommendations for B.C. Farmed Fish Sales to the U.S. East Coast

Initially, there were serious questions concerning the benefits of sending fish to the Fulton Fish Market as it is not a quality-oriented sales centre. Damage is being done to the quality status of B.C. farmed salmon since it seems that Fulton is being used as a last resort dumping ground for North American wholesalers. On the other hand Norwegian farmed salmon is being directly shipped on a regular basis, hence there is a perception of better quality and consistent supply.

If production in B.C. reaches volumes that warrant sales to the Fulton Fish Market, then sales should be regular and direct with emphasis on quality and a very strong buyer-education program included. The use of a "Quality Assurance" sticker and program would be a severe liability if the fish were not handled correctly at the wholesaler/distributor level and subsequently presented as a poor-quality inexpensive fish.

Generic promotion in this case appears to be greatly needed. Saving the reputation of Pacific salmon lies in generic promotion and the education of buyers. In open-air markets, the species and price appear more important than a brand loyalty established between individual companies; hence, generic promotion in this case would be appropriate.

The authors believe that one of the BCSFA stated observations, at least as it relates to the Fulton Fish Market, is correct; i.e., there are "too many sellers in the market." This is obvious when one sees a two-week old shipment of fish in New York and tracks its geographic sales path: Vancouver Island-Vancouver-Vancouver (changed hands)-Seattle-Los Angeles-New York.

General Recommendations for Trade Show Participation

1. The presence and image of B.C. farmed salmon must be enlarged and improved. British Columbia (or B.C.), is unknown in the rest of the world. A study is recommended to determine positive alternatives to the present use of "B.C. farmed salmon."

2. Representatives of the B.C. salmon farming industry should participate together under one banner at trade shows. Individual booths have little impact at a trade fair such as the Boston Seafood Show. A significant competitive advantage in profile and presence is lost. To compete internationally, a presence equal to other countries must be created. It is recommended that the BCSFA open a dialogue with B.C. companies participating at major trade shows to convince them of the mutual benefits of group displays. It is further recommended that the BCSFA seek government assistance to fund an enhanced trade show presence as a way to encourage all companies to co-operate in this regard.

3. Currently, the British Columbia Salmon Farmers Association booth presents a pictorial message which is misdirected for seafood buyers. It primarily denotes biology and technology. The message should be simple – pristine environment, high-quality fish, Los Angeles taste-test champions. The fresh fish display should be completely reworked. The brown display table is aesthetically very unappealing. The highest-quality salmon for display should be ensured. At least some of the fresh salmon should be filletted or steaked to expose the quality and deep red colour of the flesh. It is recommended that the Marketing Committee of the BCSFA convene a workshop to solicit input from the membership on the development of a new trade show display.

4. British Columbia needs to be represented at the major trade shows in a dynamic way. The industry must be convinced to push its products. With limited marketing dollars, there may be better potential for markets, other than Boston and the eastern seaboard; however, as 50 to 60 per cent of the U.S. seafood business goes through Boston, continued and vastly improved participation at the Boston Seafood Show is recommended.

5. The importance of marketing and market development for farmed salmon from British Columbia cannot be over-emphasized at this time. It is recommended that the general membership of the B.C. Salmon Farmers Association be informed of the need and urgency of these activities; the members of the trade mission to Boston are in a unique position to convey this message.

Note: Members of the trade mission formed a panel for discussion on marketing at the Annual General Meeting of the BCSFA on April 21, 1989 (see Appendix I). Further, the membership voted in favour of a $0.02 per pound levy on premium grade harvested salmon, eighty per cent of which is to be used to support the marketing program of the Association.

Further Information and Canadian Contacts

If you require further information on seafood shows or are interested in the opportunities identified by Canadian missions abroad, your first point of contact is your nearest International Trade Centre, located in major centres across Canada (see Appendix J). In addition, you may contact the Fisheries Division and the geographic trade development divisions of External Affairs and International Trade Canada, or the posts directly. The *Directory of the Canadian Trade Commissioner Service* may be consulted for a list of names and addresses.

UNITED STATES TRADE AND INVESTMENT DEVELOPMENT DIVISION (UTE)

Belkis Possamai, Marketing Officer
United States Relations Bureau
External Affairs and International Trade Canada
Tel: (613) 993-5849

TRADE COMMISSIONERS

Sandra Harris, Trade Commissioner
Fisheries Division
International Trade Development Branch
External Affairs and International Trade Canada
Ottawa, Ontario, Canada
K1A 0G2
Tel: (613) 996-3558
Fax:(613) 995-8384

Daniel Caron, Consul and Trade Commissioner
Canadian Consulate General
Three Copley Place, Suite 400
Boston, MA, 02116
Tel: (617) 262-3760
Fax: (617) 262-3415

Jack McManus, Commercial Officer
Canadian Consulate General
Three Copley Place, Suite 400
Boston, MA, 02116
Tel: (617) 262-3760
Fax: (617) 262-3415

Appendix A

INTERNATIONAL FARMED SALMON PRODUCTION

(Metric)

	1987	1988	1989	1990
Norway	46 000	80 300	120 000	145 000
Scotland	14 000	18 000	33 000	50 000
B.C.	1 200	6 000	14 500	20 000
Chile	2 100	3 100	6 600	13 000
Other	18 000	25 700	38 400	53 000
Total	81 300	133 100	212 500	281 000

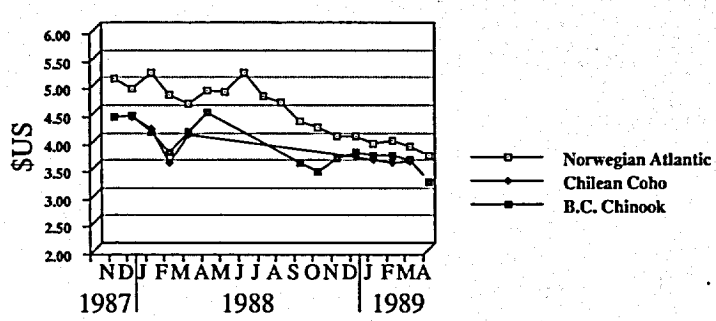
Source: ISFA & DPA Group Inc., April 1989.

Appendix B

FRESH SALMON PRICES

4 to 6 lb. (1.8 to 2.7 kg)

Sales by first receivers



Source: Urner-Barry B.C. *Salmon Farmers Association.*

Appendix C

SALES CHANNELS FOR B.C. FARMED SALMON

B.C. Fishing Companies	33%
Canadian-Based Seafood Brokers	33%
Direct to Foreign Importers	20%
Other	10%
Total	100%

B.C. Salmon Farmers Association.

Appendix D

LETTER TO POTENTIAL CONTACTS

February 28, 1989

Mr. Jack Hollcah, Pres., CEO
Certified Grocers of Florida Inc.
P.O. Box 1510
Ocala, FL.
32678

Dear Mr. Hollcah:

I am writing on behalf of a group of salmon farmers from the Campbell River area of British Columbia, Canada. Campbell River is a world famous sport fishing area for trophy sized King (Chinook) salmon. The same cool, clean, crystal clear waters are now producing high Quality Ocean Farmed Chinook (King) Salmon. Our group of experienced farmers currently represent 2000 tonnes of production annually. Through local processing it can be delivered fresh to you within 36 hours of harvest. Because a number of farms are working together, consistent supply can be maintained. Quality is assured. Our reputations were built on it, and our voluntary membership in the B.C. Salmon Farmers Association Quality Assurance Program underlines our committment.

Our group will be in Boston at the Seafood Show. We will be available for meetings from noon on Monday, March 6th until Thursday. Our objective is to establish long term relationship(s), in as direct a manner as is practicable, with companies requiring our high quality product. Consistent pricing and delivery will be a major component of the discussions.

If you would like to meet with us, would you please let us know by return FAX (604) 286-3726 or phone (606) 286-3828 to this office so that a mutually convenient appointment can be arranged. If you are unable to respond by March 3, a message could be left at our hotel, The Quality Inn (phone (617) 426-1400), or you could meet with a representative of our group who will be at the BCSFA booth #217 for the first hour of the show each day to arrange appointments.

We look forward to meeting you in Boston.

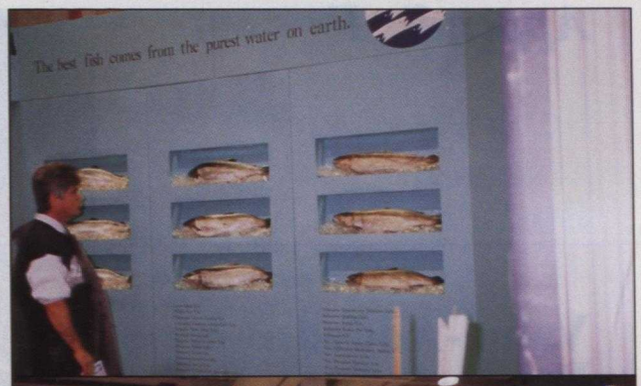
Yours truly,
Norent Inc.,

Kjell Audun Aasen
General Manager

Appendix E

Displays of B.C.'s Competitors

NEW ZEALAND



CHILE

NORWAY

IRELAND

Appendix F

Value-Added Products from B.C.

Appendix G

Fulton Fish Market Members

REPRESENTATIVE
Richard Lord
Fulton Fish Market Information Services Inc.
17 Fulton Fish Market
New York, NY, 10038
Tel: (212) 962-1608
Fax: (201) 798-3801

SELECTION OF COMPANIES
Arrow Seafoods, Inc.
32 Fulton Fish Market
Zip 10038
Tel: (212) 732-9427

Beyer Lighting Fish Co., Inc.
7-8-9 Fulton Fish Market
Zip 10038
Tel: (212) 732-2919
Fax: (212) 233-2654

C & O Sea Products, Inc.
20 Fulton Fish Market
Zip 10038
Tel: (212) 962-7680

Carter Joseph H., Inc.
33 Fulton Fish Market
Zip 10038
Tel: (212) 964-5286

Commercial Fish & Lobster Company
27 Fulton Fish Market
Zip 10038
Tel: (212) 227-8665

Cornelius, R.J., Inc.
20 Fulton Fish Market
Zip 10038
Tel: (212) 233-2987

House of Quality Fish Company
5 - 6 Fulton Fish Market
Zip 10038
Tel: (212) 587-9009

Levy, M.P. Co., Inc.
28 Fulton Fish Market
Zip 10038
Tel: (212) 227-0882

Birman Fish Co., Inc.
17 Fulton Fish Market
Zip 10038
Tel: (212) 349-9660

Blue Ribbon Fish Company
1-3 Fulton Fish Market
Zip 10038
Tel: (212) 233-0470

Caleb, Haley & Co., Inc.
14 Fulton Fish Market
Zip 10038
Tel: (212) 732-7474

Cinrox Shellfish Co. L, Inc.
107 Fulton Fish Market
Zip 10038
Tel: (212) 349-1761

Commercial Fish Company
27 Fulton Fish Market
Zip 10038
Tel: (212) 732-8782

Galilee Seafood, Inc.
32 Fulton Fish Market
Zip 10038
Tel: (212) 732-9428

La Rocca Fish Co., Inc.
24 Fulton Fish Market
Zip 10038
Tel: (212) 233-0344

Appendix H

Seafood Distributors and Salmon Buyers in Boston Area

SEAFOOD DISTRIBUTORS

Atlantic Crossings, Inc.
206 Dedham Street
Norfolk, MA 02056
Tel: (617) 384-7785
Mr. Vin Sbano
Mr. Tony Sbano

Bay Shore Group, Ltd.
853 Turnpike Street
Suite 244
N. Andover, MA 01845
Tel: (617) 975-0626
Mr. Mike Langley

Bay State Lobster Co., Inc.
379 - 395 Commercial Street
Boston, MA 02109
Tel: (617) 523-4588
Mr. Richard Faro

Commodity Sales, Inc.
1661 Worcester Road
Framingham, MA 01701
Tel: (617) 620-0001
Mr. Steve Foreman
Mr. John Connors

E.L. Cooney
11 Forbes Road
Braintree, MA 02184
Tel: (617) 773-1777
Mr. Thomas Cooney

Crocker & Winsor Seafoods
145 Northern Avenue
Boston, MA 02210
Tel: (617) 482-6648
Mr. Sam Bloom

Demoulos Supermarkets
875 East Street
Tewdbury, MA 01876
Tel: (617) 851-7381
Mr. Ron Carignan

Dole & Bailey, Inc.
24 Fish Pier
Boston, MA 02210
Tel: (617) 935-1234
Mr. Neil Murphy
Mr. Ken Cerullo
Ms. Susan Adelson

Foley (M.F.) Fish Co.
24 W. Howell Street
Dorcester, MA 02125
Tel: (617) 288-1300
Mr. Frank Foley

Fresh Water Fish Co.
145 Northern Avenue
Boston, MA 02210
Tel: (617) 227-4232
Mr. Gerald Abrams

Gorton Corp.
327 Main Street
Gloucester, MA 01930
Tel: (617) 283-3000
Mr. Stan Feener
Mr. Jim Ackert

Hadley Group, Ltd.
P.O. Box 206
Shovel Shop Square
N. Easton, MA 02356
Tel: (617) 238-8515
Mr. Mark Hadley

Jordan's Meats, Inc.
38 India Street
Portland, ME 04104
Tel: (207) 772-5411
Mr. Richard Giles

G.P. Hale Fish Co.
145 Northern Avenue
Boston, MA 02210
Tel: (617) 423-7185
Mr. Wayne Hale

Higgins (G.F.), Inc.
195 Rockland Street
Hanover, MA 02339
Tel: (617) 826-8858
Mr. Gerry Higgins

Ipswich Shellfish Co., Inc.
14 Hayward Street
Ipswich, MA 01938
Tel: (617) 356-4371

LeBoeuf & Associates, Inc.
368 Hillside Avenue
Needham Heights, MA 02194
Tel: (617) 444-5666
Mr. Norm LeBoeuf

Legal Seafoods, Inc.
33 Everett Street
Allston, MA 02134
Tel: (617) 783-8084
Mr. Roger Berkowitz

National Fish & Seafood, Inc.
17 - 21 Rogers Street
Gloucester, MA 01930
Tel: (617) 283-8907
Mr. Jack Ventola

Ocean Venture, Inc.
149 Maple Street
Danvers, MA 01923
Tel: (617) 774-9390
Mr. Norm Desrochers

New Boston Seafoods
2 Food Mart Road
Boston, MA 02188
Tel: (617) 770-8021
Mr. Al Chiacchio

North Coast Seafoods, Inc.
12 - 14 Fargo Street
Boston, MA 02210
Tel: (617) 523-0685
Mr. Jim Stavis

O'Donnell-Usen Fisheries Corp.
255 Northern Avenue
Boston, MA 02210
Tel: (617) 542-2700
Mr. David Bollivar

Ocean Fresh Seafood, Inc.
693-695 E. Washington Street
North Attleboro, MA 02760
Tel: (617) 695-7087
Mr. Bob Coutu

Supreme Sea Products, Inc.
47 Ellery Street
S. Boston, MA 02127
Tel: (617) 269-1500
Mr. Al Catizone

Slade Gorton & Co., Ltd.
295 "A" Street
Boston, MA 02210
Tel: (617) 357-5800
Mr. Mike Gorton

Stavis Seafoods, Inc.
7 Channel Street
Boston, MA 02210
Tel: (617) 482-6349
Mr. Ed. Stavis

Turner Fisheries, Inc.
1 Fish Pier
Boston, MA 02210
Tel: (617) 426-6530
Mr. John Turner

Viking Seafoods, Inc.
P.O. Box 159
50 Crystal Street
Malden, MA 02148
Tel: (617) 321-6050
Mr. Charles Gulino

Universal Fish of Boston, Inc.
10 Tower Office Park
Suite 500
Woburn, MA 01801
Tel: (617) 938-1111
Mr. Tom Katz

West Bay Imports, Ltd.
925 Main Street
East Greenwich, RI 02818
Tel: (401) 738-6500
Mr. Russ Haft

SALMON BUYERS

Legal Sea Foods, Inc.
33 Everett Street
Allston, MA 02134
Tel: (617) 783-8084
Roger Berkowitz

Aslanis Seafoods, Inc.
540 E. Street
P.O. Box 102
Boston, MA 02101
Tel: (617) 423-3474
Gus Aslanis

Crocker & Winsor Seafoods, Inc.
145 Northern Avenue
Boston, MA 02210
Tel: (617) 482-6648
Sam Bloom

John Nagle Co. (Broker)
660 Summer Street
Boston, MA 02210
Tel: (617) 423-6712
Russ Nagle

Maloney Seafood Corp.
235 Northern Avenue
Boston, MA 02210
Tel: (617) 426-5400
Tom Maloney

Northcoast (Booth)
12 - 14 Fargo Street
Boston, MA 02210
Tel: (617) 523-0685
Norm Stavis

R.S. Hamilton Co. (Broker)
145 Northern Avenue
Boston, MA 02210
Tel: (617) 542-3350
David Norwood

Slade Gorton & Co., Inc.
295 A Street
Boston, MA 02210
Mike Gorton
Tel: (617) 357-5800

Stavis Seafoods, Inc.
7 Channel Street
Boston, MA 02210
Tel: (617) 482-6349
Ed Stavis

Steve Connolly Seafood, Inc.
10 Newmarket Square
Boston, MA 02118
Tel: (617) 427-7700
Steve Connolly

National Fish & Seafood, Inc.
17 - 21 Rogers Street
Gloucester, MA 01930
Tel: (617) 283-8907
Jack Ventola

Ocean Fresh Sea Food, Inc.
473 E. Washington Street
North Attleboro, MA 02760
Tel: (617) 695-7087
Bob Coutu

G. F. Higgins, Inc.
825 Washington Street
Pembroke, MA 02359
Tel: (617) 826-8858
Jerry Higgins

Springfield Smoked Fish Co.
150 Switzer Avenue
Springfield, MA 01109
Tel: (413) 737-8693
Bob Axler

Dole & Bailey, Inc.
24 - 30 Fish Pier
Boston, MA 02210
Tel: (617) 542-6377
Susan Adelson

Turner Fisheries, Inc.
1 Fish Pier Road
Boston, MA 02210
Tel: (617) 426-6535
Bill Stride

Alpo Pet Foods
P.O. Box 2187
Allentown, PA 18001
Tel: (215) 398-4566
Doug Holz

Appendix I

B.C. Salmon Farmers Association Annual General Meeting

April 21, 1989

Excerpt from the minutes

Panel Discussion:
Presented by Don Tillapaugh, Kanish Aquafarms

Panel Members:

Derek Sharpe	Quartz Bay Sea Farms
Rob Smeal	Saltstream Engineering
Keith Ware	Quality Sea Farms
Paul Tate	Conville Point Sea Farms
Kjell Aasen	Norent Inc.

The above farmers, along with Rolf Aunet of RSR Sea Farms, were sponsored by External Affairs and International Trade Canada on a trade mission to attend the Boston Seafood Show and to visit the New York salmon markets.

The essence of the presentation was that we must, as an industry, have a bigger presence at seafood trade shows. A comment was made by the panel that the competition at the Trade Show – Scotland, Chile, Norway – had very visible and well-presented exhibits and that they had exhibited in a united manner rather than a disjointed, (i.e. one B.C. salmon farming company here and another on the next floor) approach that B.C. appeared to have.

The quality and appearance of fish, as seen by members of the panel during their trip to New York, resulted in a statement that the B.C. salmon farming industry should investigate the distribution channels thoroughly and try to gain more control over the various aspects.

Appendix J

International Trade Centres

ALBERTA
International Trade Centre
Room 540
Canada Place
9700 Jasper Avenue
Edmonton, Alberta
T6J 4C3
Tel: (403) 495-2944
Telex: 037-2762
Fax: (403) 495-4507

International Trade Centre
Suite 1100
510-5th Street S.W.
Calgary, Alberta
T2P 3S2
Tel: (403) 292-6660
Fax: (403) 292-4578

BRITISH COLUMBIA
International Trade Centre
P.O. Box 11610, Suite 900
650 West Georgia Street
Vancouver, British Columbia
V6B 5H8
Tel: (604) 666-1444
Telex: 045-1191
Fax: (604) 666-8330

MANITOBA
International Trade Centre
330 Portage Avenue
9th Floor
P.O. Box 981
Winnipeg, Manitoba
R3C 2V2
Tel: (204) 983-8036
Telex: 075-7624
Fax: (204) 983-2187

NEW BRUNSWICK
International Trade Centre
Assumption Place
770 Main Street
P.O. Box 1210
Moncton, New Brunswick
E1C 8P9
Tel: (506) 857-6452
Telex: 014-2200
Fax: (506) 857-6429
Toll Free: 1-800-332-3801

NEWFOUNDLAND AND LABRADOR
International Trade Centre
90 O'Leary Avenue
P.O. Box 8950
St. John's, Newfoundland
A1B 3R9
Tel: (709) 772-5511
Telex: 016-4749
Fax: (709) 772-2373

NOVA SCOTIA
International Trade Centre
1496 Lower Water Street
P.O. Box 940, Station M
Halifax, Nova Scotia
B3J 2V9
Tel: (902) 426-7540
Telex: 019-22525
Fax: (902) 426-2624

ONTARIO
International Trade Centre
Dominion Public Building
4th Floor
1 Front Street West
Toronto, Ontario
M5J 1A4
Tel: (416) 973-5053
Telex: 065-24378
Fax: (416) 973-8161

PRINCE EDWARD ISLAND
International Trade Centre
Confederation Court Mall
134 Kent Street, Suite 400
P.O. Box 1115
Charlottetown, Price Edward Island
C1A 7M8
Tel: (902) 566-7400
Telex: 014-44129
Fax: (902) 566-7450

QUEBEC
International Trade Centre
Stock Exchange Tower
Suite 3800
800 Victoria Place
P.O. Box 247
Montreal, Quebec
H4Z 1E8
Tel: (514) 283-8185
Telex: 055-60768
Fax: (514) 283-3302

SASKATCHEWAN
International Trade Centre
6th Floor
105 - 21st Street East
Saskatoon, Saskatchewan
S7K 0B3
Tel: (306) 975-5925
Telex: 074-2742
Fax: (306) 975-5334