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## NOTICE TO READERS

The purpose of this study is to provide a review of international lobster markets and offers market intelligence for use by the Canadian lobster industry. Information is provided to facilitate industry in developing and implementing export marketing strategies for the benefit of all stakeholders. The review includes a brief analysis of 52 countries abroad including conditions and trends in each market. Information contained in the review is intended to assist individual firms and consortia to develop and implement marketing plans by providing practical information for each country.

Lobster harvests have increased in Canada since 1987, with landings for 1993 totalling 40,469 MT. Careful management of the resource has ensured plentiful supply over the past five years. Nova Scotia is the largest lobster producer, but landings in the province have declined to 17,973 MT {Cdn\$156.7 million} in 1993, down from 23,469 MT {Cdn\$153.9 million} in 1991. Landings in Prince Edward Island have declined in a similar fashion from a high of 9,634 MT {Cdn\$45.3 million} in 1991, to a low of 8,794 MT {Cdn\$51.0 million} in 1993. New Brunswick harvests have also declined from a high of 9,193 MT {Cdn\$44.4 million} in 1989, down to 7,637 MT {Cdn\$44.9 million} in 1993. Quebec and Newfoundland landings have remained relatively stable over the past ten years, but in terms of value, Quebec has increased significantly since 1984 to Cdn\$24.9 million in 1993.

Canadian exports of lobster products have been strong during the 1990's, with exports for the January to November period in 1994 showing impressive gains over 1993 statistics. Canadian lobster exports for the first 11 months of 1994 totalled 27,925 MT {an increase of 15.5% over the same period in 1993}, valued at \$433,497 million {an increase of 13.7% over 1993}. Leading the way for 1994 includes lobster, in brine, frozen up 8.3% by volume; lobster, nes, frozen up 24.9%; lobster, live up 12.8%; lobster, in ATC, nes up 24.3%; and, Lobster, prepared, preserved up 15.5% over 1993 by volume.

Care has been taken to ensure accuracy at the time of preparation. *However, prudent Canadian fish and seafood exporters are advised to check all relevant details and specifications with their commercial contacts and to adhere strictly to the requirements and regulations set by international importers and authorities.* Foreign Affairs and International Trade (DFAIT) has taken care in presenting the information contained in this review, but does not guarantee the accuracy of the data nor the absence of errors and omissions. DFAIT accepts no responsibility for interpretation by companies of the information contained in this document or for the reliance by companies upon such information or opinions.

The report was prepared by the Sectoral Liaison Secretariat (TOSA), Foreign Affairs & International Trade. Queries about the report should be directed to TOSA at 125 Sussex Drive, Ottawa. [Fax:(613) 943-1103]. A condensed version of this document is available through FAXLINK at (613) 944-4500.

The report was researched, formatted and coordinated by Gary G. Smith of *INFI-GAR*, vetted by Martin Foubert of Foreign Affairs and International Trade, and statistical databases were provided by Laurette Gagnon of Fisheries and Oceans. The country-specific information contained in this review was provided by Trade Commissioners and Commercial Officers from Canadian Embassies, High Commissions and Consulates in 46 countries.