

Lobster product distribution in Australia is on a state-by-state basis. Domestic lobster harvests from Western Australia and Tasmania are sold through distributors, while imports are handled by Australian brokers and distributors. The Australian market is dominated by fresh rock lobster, but there are limited opportunities for imported frozen rock lobster and *Homarus* spp.. Possibilities exist for imports of extra-large, whole frozen lobster, which would be seen by Australian consumers as clearly different from domestic lobster. In addition, there is potential for imports of processed lobster portions.

BAHRAIN

Canada-Bahrain relations are good, although neither country maintains a diplomatic mission in the other's capital. Traditionally, Bahrain has been an entrepot and, although its importance in this sphere has declined with the development of mainland ports, Bahrain has used its central geographical location to become an important service centre for the Arab Gulf region as a whole. Bahrain will continue to develop its role as a regional centre for banking and tourism and will benefit in these areas from the Bahrain-Saudi Arabia causeway. In spite of the promotion of the agricultural sector, Bahrain's imports of food, live animals, beverages and tobacco account for approximately 10 percent of total import spending. Agriculture has declined rapidly since the 1960's, largely as a result of the heavy demands made on Bahrain's limited water supplies. The recent wars in the area has affected Bahrain's economy to the extent that it has lost some of its attractiveness as an entrepot centre to Dubai. As demonstrated by the Canadian Trading House Mission to Bahrain in 1993, the country should not be overlooked as a market of considerable potential for small and medium-sized suppliers of a broad range of goods and services. Bahrain is a cash market for trade, and irrevocable letter of credit is the normal practice in making payments. Bahrain is not a large importer of fish and seafood products with total imports of US\$3.55 million in 1992, a figure that has remained relatively steady over the past five years. Of that total, US\$2.4 million represented fish, fresh, chilled or frozen; US\$550,000 represented imports of crustaceans and molluscs; and US\$400,000 was comprised of canned fish. Bahrain is encompassed by the Gulf of Arabia and has a long tradition of consuming species caught in those waters.

CHINA

Chinese consumers clearly prefer fresh fish in their diets, but consume significant amounts of specialty dried seafood products. Chinese citizens are extremely discerning where fish and seafood products are concerned, and continue to demand products with consistently high quality. Chinese residents incorporate a wide variety of seafood products into their diets. Some of the more popular species which are consumed on a regular basis include lobster and other crustaceans. As the Chinese economy opens up more to international seafood imports, lobster exporters may be positioned to capture market share. Because of very high prices in the Chinese market {Cdn\$60.00 per kilogram}, consumption and imports are at insignificant levels. According to the China Society of Fisheries, there are no Chinese exports of lobster products.

Demand for food products in general is expected to increase because of the growth in private expenditure patterns of the population, as well as the influx of tourists into China. Other significant niche marketing opportunities for lobster products are developing in the airline catering sector and the growing fast food and beverage sectors. The food categories showing the largest increases in demand for China include seafood products.

Frozen seafood products are slowly making inroads into the Chinese consumer markets, partially influenced by increased access to imported products. Future trends are expected to follow other semi-industrialized nations whereby an increased presence of women in the workforce leads to higher demand for conveniently prepared foodstuffs and seafood products. Current popularity of "microwaveable" food products is slowly influencing seafood consumption patterns, but still offers niche opportunities for international lobster exporters. Major hotels concentrated in the major centres of China are important users of high-value frozen seafood products, including demand for lobster.

HONG KONG

The market for foodstuffs in Hong Kong is estimated at approximately Cdn\$3.85 billion, of which 80 percent is supplied by imports and 20 percent by local production. Foodstuffs are largely imported into Hong Kong from China, Taiwan and neighbouring countries. However, with the continuous growth of supermarkets and changes in eating habits among younger Chinese, western style processed foods, frozen seafoods and packed items have become more popular. Substantial quantities of these items have been imported from abroad to satisfy local demand. Many world renowned brands such as Del-Monte, Campbell, Bird's Eye, Sara Lee, Kraft, Nabisco, Heinz, etc. are easily available in local supermarkets.