

Italy's food distribution system is characterized by myriads of small retailers served by several levels of equally small intermediaries. Supermarkets exist, but even by European standards constitute a relatively limited segment of the market. Even the largest importers and wholesalers cannot normally guarantee adequate distribution outside of their own provinces. The sheer numbers of firms involved and the many levels of intermediaries makes it difficult to follow the market. Live lobster shipments entering Italy are routinely consigned to Milan or Rome airports by Italian carriers. The Milan Fair offers the best venue for promotion of lobster products in Italy, and particularly for increased value-added products. There has been little interest in frozen lobster or lobster meat, but consumers should eventually be willing to consider the frozen product as an alternative, particularly if preparation and cooking convenience is improved, and packaging made more attractive.

NETHERLANDS

Fisheries has been a way of life for many centuries in the Netherlands. In more recent times, shrinking resources and the resultant introduction of catch quotas has led to overcapacity in the Dutch fishing fleet, one of the most modern in the world. Lobster is not harvested in the Netherlands and domestic requirements must be imported. However, purchases are not made solely for the local market, a portion of the lobster is for export, mainly to neighbouring EC countries, and is typical of the Netherlands and its highly developed "gateway-to-Europe" role. The market for frozen lobster parts and meat is negligible, mainly due to the uncomfortably high import duty, and unfamiliarity with the products. The bulk of the lobster consumed in the Netherlands is eaten in restaurants. The role of the Netherlands as the trade and distribution hub of Europe applies equally to fish and lobster products. A good portion of imports, which have expanded significantly in recent years, is re-exported serving markets chiefly in Europe.

Netherlands Lobster Exports

{Tonnes}

Destination	1991	1992	1993
Total Exports	811	761	536
Belgium/Luxembourg	735	668	482
France	27	29	11
Other Europe	46	60	38
Other Countries	3	4	5

Source: Canadian Embassy, The Hague.

For fresh lobster, large Dutch importers have their own basins where the lobsters are given a chance to "de-stress" after their flight. From there, the lobsters are sold to regional distributors and wholesale supermarkets both locally and abroad, especially in Belgium. Smaller importers with limited holding facilities cater to the restaurant trade and retail outlets in their areas, rather attempting to cover the entire Dutch market. For frozen lobster, "popsicle" is usually bought in containerloads and distributed by the importer directly to retailers, both supermarkets and specialty fish stores. Lobster parts and meat for institutional products are sold through wholesale supermarkets, which cater to the restaurant trade. Purchasing abroad is direct, or through a Dutch importer.

Netherlands Lobster Imports

{Tonnes}

Destination	1991	1992	1993
Total Imports	1,147	1,335	995
Canada	960	1,112	798
United States	122	175	162
United Kingdom	32	18	12
Other Europe	28	20	22
Other Countries	5	—	—

Source: Canadian Embassy, The Hague.