

## EUROPE/SCANDINAVIA

### AUSTRIA

Austria has relatively low fish consumption at approximately 5.4 kilos per capita, broken down to 3.4 kilos fresh fish, 1.9 kilos canned fish and 0.1 kilo other fish and seafood products. Although the Austrian market is relatively small, it is a stable consumer market and is increasing slightly, especially for specialty seafood products. Austria's total imports of crustaceans in 1991 were 2,200 MT valued at Cdn\$21,100,000, c.i.f. Austrian border.

The Canadian share of imports was 46 MT valued at Cdn\$708,000. Total Austrian lobster imports for 1991 are broken down as follows: H.S.0306.11 (2,800 kilos); 0306.12 (18,400 kilos); 0306.21 (900 kilos); 0306.22.9 (50,700 kilos); and 1605.3 (4,100 kilos). In 1992, Austrian imports of fresh or chilled lobster totalled 45 MT valued at US\$785,000. Major suppliers of lobster to Austria were the EC and EFTA countries, as well as Canada.

Deliveries are spread throughout the year, although the demand increases during the Christmas season, and is very low in July and August when most Austrians are on annual vacation. More high-quality Austrian restaurants are offering lobster on their menus, however, at very high prices to the final consumer. Most of the marketed lobster products are consumed by the larger Austrian hotels and specialty fish and seafood restaurants. Austrian importers and wholesalers distribute lobster products direct to retail traders, hotels, restaurants etc.

### BELGIUM

Approximately 1,737 tonnes of lobster and lobster products entered Belgium in 1993, 80 percent live and 20 percent frozen. International marketshare for lobster in Belgium includes: Canada {70 percent}; the United States {20 percent}; and the EC, mainly Scotland and France, comprising the remaining 10 percent. Acceptable weights vary between 300 grams and 1000 grams, with 500-600 grams the most desirable weights. Import prices for lobster at the end of 1992 were as follows: lobsters up to 600 grams (Cdn\$4.70 per pound); 600 grams and up (Cdn\$5.00 per pound). Significant volumes of lobster products are entering Belgium from the Netherlands, and are most likely Canadian and U.S. lobster trans-shipped from Holland to the local market.

Belgium importers have complained the extreme price fluctuations which affect lobster products, has had a negative impact on sales to restaurants and hotels, their most important customers. Demand for lobster meat and prepared dishes with lobster, while minimal, is expected to increase in the coming years. Belgium has a well established distribution system for live and frozen lobster products.

Lobster products enter Belgium through importers who sell direct to hotels, restaurants, wholesalers, supermarkets and fine food retail outlets. Canned lobster is imported by supermarkets and trading houses. Lobster exports from Belgium totalled 131 tonnes in 1993, up from 107 tonnes in 1992, an increase 22.4 percent. At the same time, imports of lobster into Belgium equalled 1,737 tonnes in 1993, down from 2,207 tonnes in 1992 {21.3 percent}.

### *Belgium Lobster Exports* {Tonnes}

| H.S.      | Description         | 1990 | 1991 | 1993 | 1993 |
|-----------|---------------------|------|------|------|------|
| 0306.1210 | In brine, frozen    | 25   | 46   | 46   | 82   |
| 0306.1290 | Lobster, nes frozen | 66   | 7    | 3    | 7    |
| 0306.2210 | Lobster, live       | 13   | 6    | 7    | 17   |
| 0306.2290 | Lobster, not frozen | 6    | <1   | <1   | 4    |
| 1605.0000 | Prep/pres, canned   | 12   | 20   | 50   | 21   |
|           | Total Exports       | 122  | 80   | 107  | 131  |

Source: Belgium Central Economy Council