

of which the great part is imported in the fresh/chilled state. Exports run around 1,000 mt mainly of canned and smoked product.

The eel catch is relatively steady throughout the year, but, as with imports, there is a notable peak in sales in the October-December period, prior to the main consumption season at Christmas time. There is little fresh eel consumption, and practically all local production and imports are processed by smokers and canners. With regard to size, the canners normally prefer larger sizes (80 cm and up), whereas the smokers prefer the smaller eels. The main sources of supply are the Mediterranean countries such as France, Greece, Turkey and Tunisia, but also from the Netherlands, Belgium, Denmark, the USA and as far away as New Zealand.

Due to the strong preference for the live product, Canadian exporters have in the past encountered technical difficulties in arranging direct non-stop air shipment to Italy, and this remains a key factor in ensuring limited mortality en route, particularly in the summer period. It is important to note that Italian health regulations require that frozen fish products be gutted. Also, besides the usual Fisheries Health Certificate, eels must be accompanied by a mercury certificate stating that the mercury content does not exceed 0.7 ppm. The customs duty on fresh and frozen eels is 3 percent, but a duty-free quota is established each year for fresh or frozen imports destined for the canning and smoking industries.

Lobster:

There is a small but potentially interesting market in Italy for live lobster. Total imports in 1988 amounted to 529 mt, more than double the previous year, of which 79 mt from EC countries, 317 mt from the USA and 131 mt from Canada. It should be noted that much of the product of both EC and USA origin is trans-shipped Canadian product. Due to problems of mortality during shipping, many companies have been hesitant to enter this market, but if firms can organize a reliable shipping program with good technical support en route and at both ends, these problems can be resolved satisfactorily. The customs duty rate for live lobster from Canada is 8 percent. Up to now there has been little interest in frozen lobster or lobster meat, but with the strong, unfulfilled demand for the live product, importers should eventually be willing to consider the frozen product as an alternative.

Clams:

Also in this case, the market up to now has been limited. With increasing problems of pollution in traditional supplying countries, however, demand has developed for supplies from North America. The product of greatest interest at present is