

SWITZERLAND

Switzerland and the Principality of Liechtenstein are largely depend on fish imports as local production only covers about 9 percent of total consumption. Total imports of fish including canned and processed fish in 1992 were 49,068 metric tons, a 3 percent decrease against 1991. Switzerland's fish consumption is rather small, with total per capita consumption amounting to 7.7 kilograms per year. Switzerland is a landlocked country with no domestic lobster production or exports. Due to the recession, the market for lobster products in Switzerland is far from encouraging, but niche opportunities do exist. Lobster is perceived as a luxury food item, and the market in Switzerland is rather small. Over the past few years however, the domestic Swiss market for lobster products has been growing. A total of 25.2 MT {SFr\$500,000} of frozen lobster products {*Homarus* spp.} were imported into Switzerland in 1993, a decrease from 40.3 MT {SFr\$947,000} in 1992. Primary international suppliers to the Swiss market were France, the Netherlands, the United States and Canada. A total of 213.6 MT {valued at SFr\$4.15 million} of live lobster {*Homarus* spp.} was imported into Switzerland in 1993, to which Canada contributed 60.3 MT {SFr\$1.15 million}, resulting in a market share equal to 28.2 percent by volume, and 27.8 percent by value. Total imports of live lobster fell by 15 percent in 1993 against 1992 figures. Other major suppliers of live lobster to the Swiss market include the United States and France, with the U.S. accounting for 126.7 MT valued at SFr\$2.31 million.

Swiss Lobster Imports of *Homarus americanus*

Product	1992	1992	1993	1993
	MT	SFr	MT	SFr
Lobster, live	249.9	4,613,000	213.6	4,147,000
Lobster, frozen	40.3	947,000	25.2	500,000
Lobster, canned	n/a	n/a	6.2	145,000

Source: Canadian Embassy, Berne.

Lobster is also imported to Switzerland frozen in brine, and canned from the same suppliers. Competition to *Homarus* spp. is largely from spiny lobster {*Palinurus* spp.}. Importers of live lobster sell directly to Swiss hotels, restaurants and fine food establishments. Frozen in brine lobster products are sold by department stores {eg. Migros, Switzerland's most important food chain}. In addition, there were small volumes of canned lobster imports into Switzerland totalling 6.2 MT {SFr\$145,000} in 1993. Despite heavy competition from European {particularly Scandinavian} and other international suppliers, good prospects continue to exist in the Swiss market for live and frozen lobster. At today's levels, European lobster {*Homarus gammus*} remain high in price compared to Canadian and American supplies {*Homarus americanus*}, however, European lobster products are considered to be of better quality by Swiss importers, but scarce in supply. An importer of live lobster in Switzerland paid the following prices for imported product in the fall of 1994: Canadian lobster-Cdn\$8.09 per pound {454 grams}; and, Maine lobster-US\$5.75 per pound {prices are c.i.f Zurich airport; minimum quantity 100kg}. In general, lobster prices have decreased over the last five years.

UNITED KINGDOM

Canadian lobster dominates the live lobster market in the United Kingdom. Domestic landings are less than 1,000 tonnes per annum, and much of this is exported to France. The United States has a much smaller share of the United Kingdom market for live lobster, although some Canadian suppliers move product through Boston. In addition, there is no canned or frozen lobster product produced locally. Canadian live lobster generally enjoys a better quality image than American product. However, the latter tends to be cheaper, and some traders buy it when Canada has soft-shelled lobster. There is a certain cachet about local lobster, particularly Scottish product. Some of the most exclusive chefs claim the Scottish lobster is superior, but the supply small, and price high for most of the year.

Sales of frozen product have been relatively static in the United Kingdom during the 1990's. New "pack" types may improve sales, but the United Kingdom was in sharp recession for two years, which has made it a tough market to market lobster products. Live lobster business accounts for the major market, and is almost exclusively sold to restaurants. A very small sector of the population, mainly ethnic Chinese, buy live lobster to cook at home. There has been recent interest in United Kingdom supermarkets for selling cooked, chilled lobster. Import statistics for lobster products entering the United Kingdom for 1992 were as follows: fresh or chilled totalling 814 MT valued at US\$8.23 million; and, frozen lobster products totalling 617 MT valued at 6.61 million.