

ITALIAN SHELLFISH MARKET

Italy's production of all shellfish is estimated officially at around 135,000 t, but the real figure could well be twice as much. Production of shellfish is in steady decline, however, as pollution and over-fishing in the Mediterranean have considerably reduced marketable shellfish resources.

Major species caught (with estimated catch figures in parentheses) are caramote prawn (7,000 tonnes), mantis squillid (4,000 tonnes), mediterranean mussel (5,000 tonnes), cuttlefish (9,000 tonnes), loligo squids (7,000 tonnes), other squids (5,000 tonnes), common octopus (8,000 tonnes), molluscs (20,000 tonnes). Besides output from maritime fisheries, Italy also has a significant aquaculture production of some 80,000 tonnes of bivalve molluscs, consisting mostly of clams.

Imports of all shellfish products in 1992 amounted to just over 200,000 t, of which some 186,000 tonnes fresh/frozen products and 14,000 tonnes canned shellfish. Major import items (with tonnages in parentheses) included the following: frozen pandalis shrimp (6,181 tonnes), other frozen shrimps and prawns (21,623 tonnes), frozen *Illex* squid (9,548 tonnes), frozen loligo squid (9,080 tonnes), oysters (4,577 tonnes), live lobsters (2,215 tonnes), mussels (17,606 tonnes).

Some 41 percent of Italy's 200,000 tonnes shellfish imports are from other EU Member States, and purchases from the United States and Canada are relatively meagre, amounting to only 6,454 tonnes and 423 tonnes, respectively. These consist mainly of live lobsters and loligo squids. Shellfish demand is concentrated in the major coastal cities, and is generally greatest during the summer vacation period, when normal domestic requirements are augmented by strong foreign tourist demand.

While there is a very small market of household sales, the major users are restaurants, hotels, caterers, etc. which have strong preference for fresh products whenever possible. The Italian consumer is quite demanding as far as product quality is concerned, and is usually willing to pay the higher price entailed. In general, supplier offers are rejected less on price considerations than on quality. The following sections provide more detailed information on products of interest to Canadian exporters.

SQUID

Three species of squid are commonly fished in Italian waters, the "calamaro" or common squid (*Loligo vulgaris*), the "totano" or European flying squid (*Todarodes sagittatus*) and the "totano volatore" or Mediterranean flying squid (*Illex coindetti*). Commercially the latter two are generally lumped together, and the only distinction made is between the calamaro and the totano.

The former has firmer flesh, consequently better cooking and keeping quality and fetches a significantly higher price. In recent years the domestic catch has usually run around 7,000 tonnes of calamari and some 5,000 tonnes of totani. Not all of these totals are fished in the Mediterranean, as the Italian ocean fleet also takes squid off the coasts of North and South America as well.