

Fish in Germany was until recently retained mostly by fishmongers, but is now increasingly available through the food section of department stores and in supermarkets. Currently, fishmongers are dominant in the German fresh and smoked fish sectors, while supermarkets have been key in expanding the frozen fish market. German department stores focus mainly on the prepared meals end of the market with fish preparations and luxury items. Competition exists within the market from shrimp and prawns. Germans favour live lobster, frozen lobster is not as popular, and canned lobster is seldom used, mainly only in salads. Current import statistics for 1993 are as follows: H.S.0306.11 (118,400 kilos valued at DM\$5,487,000); 0306.12.1 (366,900 kilos valued at DM\$5,565,000); 0306.12.9 (16,100 kilos valued at DM\$491,000); 0306.21 (50,900 kilos valued at DM\$1,943,000); 0306.22 (853,900 kilos valued at DM\$15,349,000); and 1605.3 (43,700 kilos valued at DM\$1,960,000).

The major point of entry for live lobster in Germany is the Frankfurt airport. Lobster is distributed mainly through wholesalers, primarily situated in Hamburg. Fishmongers are dominant in the fresh and smoked fish sectors, while supermarkets have been key in expanding the frozen fish market. Department stores focus mainly on the upper end of the market by selling fish preparations and luxury items. There is no central fish market to serve as a pricing and distribution hub, although most German importers can be found in Hamburg and Bremerhaven. Germany is a net importer of lobster. Luxury fish consumption has risen sharply over the past few years, especially in restaurants, as Germans tend to dine out more. Two-thirds of the lobster consumed locally is in restaurants, with one-third consumed in households. High and rising incomes make this country an excellent market for lobster, and offer good prospects for such luxury products as shrimp, shellfish or freshwater fish. At the same time, the less-affluent consumers of eastern Germany have served to reinforce demand for cheaper forms of fish. Appropriate promotional events in Germany which should be considered by Canadian lobster exporters are ANUGA, and the Bremen Fish Fair.

GREECE

Although Greece, except for its northern boundaries, is surrounded by sea, it is a net fish importer making it a good export market for many fish and seafood products. Greek fish importers and agents have been in business for many years and have established good commercial ties with international suppliers. Lobsters are generally considered to be an expensive fisheries product in Greece, and sells for approximately US\$35 per kilogram in the fish markets and for over US\$60 per kilogram in restaurants. A small quantity of lobsters are produced locally, but most lobster products are imported. According to the National Statistics Bureau of Greece, 17,837kg of lobster were imported in 1991 (valued at US\$258,037), and 23,030kg were imported from January-September 1992 (valued at US\$430,440). The breakdown for 1992 was as follows: H.S.0306.11 (2742kg); 0306.12 (18,220kg); 0306.22 (1956kg); and 1605.3 (112kg). Lobster is generally imported into Greece from countries such as Canada, France, Italy, the United Kingdom, Thailand, Holland, Denmark and the United States. Occasionally, small quantities are imported from Morocco, Mauritania, Ghana, Tanzania, Norway, India, Iceland, Philippines, and even Albania. Potential exists in Greece for frozen lobster tails of 10-12 ounces, however, only if the price upon arrival in Greece can be under US\$25 per kilo. Cold storage facilities are ample in the Athens area, and other major cities throughout Greece. Transportation to final destination, no matter how far from Athens, poses little problem for international lobster exporters. Greece is an attractive long-term market offering good potential for frozen and live lobster.

IRELAND

Per capita fish consumption in Ireland for 1991 was approximately 8.03 kilograms per annum. Household consumption of lobster in Ireland is very modest. As a marine nation with a substantial fisheries sector, lobster (*Homanus gammanus*) landings in Ireland totalled 470.3 tonnes in 1993, a decrease from 549.0 tonnes in 1992 {14.4 percent}. A high percentage of the catch is exported, mainly to the France. Prices in the Irish market for lobster are largely determined and dictated by prices on the Paris market.

Irish Lobster Landings

	1990	1991	1992	1993
Metric Tonnes Landed	553.2	614.9	549.0	470.3

Source: Ireland Department of Marine