

include the good supply potential of the Canadian industry, and the high levels of quality control. Direct competition comes from the United States, and the US has targeted export enhancement funds for the promotion of salmon in the UK market. At the consumer level, there is little awareness of whether the product is of American or Canadian origin, although Marks and Spencer, a major retail outlet, sells only Canadian salmon products and the Post in London works with the firm to maintain the relationship.

LOBSTER

Canadian lobster now dominates the live lobster market in the United Kingdom. Domestic landings are less than 1000 tonnes per annum, and much of these are exported to France. The United States has a much smaller share of the U.K. market than Canada, although some Canadian suppliers move product through Boston where a US pedigree may be assumed. There is no canned or frozen product produced locally. Import statistics indicate that a large quantity of frozen U.S. lobster entered the market last year. This is a phenomenon, that after talking with the trade, the High Commission has been unable to explain and wonders if it might be due to a misclassification at point of entry by customs and excise. Sales of frozen product have been relatively static in recent years. It is hoped that new types of pack may improve sales, but the U.K. has been in sharp recession for two years, which has made it a difficult market in which to launch new product forms. Of interest is the success of one supermarket chain in selling whole cooked chilled lobster last summer.

The live lobster business accounts for the major market currently, and is almost exclusively to restaurants. A very small sector of the population, mainly ethnic Chinese, buy live lobster to cook at home, but most British people would be appalled at the idea. They tend not even to like to seeing lobster live in restaurant tanks, and then "condemn them to death" by choosing them for their meal.

There has been recent interest in supermarkets in selling cooked (in Canada) chilled lobster with some success last summer. However, the stringent new U.K. Food Act, with its call for "due diligence", means that strict quality control conditions are applied to Canadian suppliers of cooked product, and the U.K. importer assumes legal responsibility for compliance with the Act. This is especially important with the short shelf-life chilled product, and leads importers to maintain suppliers with whom which they have established good relationships.

The market for traditional frozen products is static with limited prospects for increased sales. Popsicle packs are sold in supermarkets and freezer centres. Some importers (eg. Princes and Ross), have put their own cartons on to improve the appearance of the product. Cold pack (frozen, canned) is no longer sold at the retail level because of consumer unfamiliarity with a canned product which has to be kept frozen, and fears on the part of retailers that the can might be stored incorrectly, thereby leading to food poisoning, or at least customer complaints. The limited cold pack sales which occur are for foodservice. Supermarkets, freezer centres and foodservice outlets are all supplied by traders.

Import statistics for lobster products entering the U.K. market for 1991 were as follows: H.S.0306.11, live (37,627 kilos valued at £483,939); 0306.12.1, frozen (508,233 kilos valued at £2,793,762); 0306.12.9, frozen (53,463 kilos valued at £261,962); 0306.21, not frozen (3332 kilos valued at £42,318); 0306.22.1, not frozen (784,014 kilos valued at £4,225,162); 0306.22.91, not frozen (25,080 kilos valued at £119,417); 0306.22.99, not frozen (12,530 kilos valued at £108,381); and 1605.3, prepared or preserved (91,807 kilos valued at £498,829). Traders generally perform an intermediary role for local or imported lobster and they supply restaurants, supermarkets and fishmongers. Some traders are based at