

Competing products for frozen "popsicle" lobster are: frozen rock lobster; frozen gambas; and frozen rock lobster tails. Canada is the only source of imports for frozen "popsicle" lobster entering the French market. Common weights are 200g, 225g and 250g for supermarkets, and 300g and 400g for seafood specialty shops. A reasonable estimate would be that between 80 percent and 90 percent of "popsicle" lobster is sold in supermarkets, which buy direct, or through an importer. Main periods of consumption are the year-end holiday (Christmas), and Easter. Competing products for individually quick-frozen lobster products include: frozen rock lobster, and frozen rock lobster tails. Canada is the only supplier of I.Q.F. lobster to the French market, and the product has only recently become available. An attractive market is opening up for the restaurant sector, and in some supermarket chains.

New lobster products have appeared on the French market: portion controlled frozen half lobster; and fresh, cooked half-split lobster from Canada. More conventional lobster products such as frozen lobster meat, frozen lobster tails and tomalley (frozen or canned), are relatively still unknown. Frozen, empty lobster shells are currently imported into France, and are used to produce flavourings and medicinal extracts, and imported by wholesalers. Tomalley and top shells are used to make fish soups and lobster bisque (lobster soup). Canned lobster is very expensive in France, and quantities are limited.

Marketing Considerations

The most attractive product to French customers is live lobster, and promotional efforts in France could be centred around this product form. A high-priced product {FF\$80/kg wholesale}, lobster has a festive image which can be cultivated by international suppliers. Frozen lobster products can be marketed among French restaurants, and developed in cooperation with catering firms. Demand is increasing in France for frozen lobster in individual portions for the microwave; and for uncooked, individually wrapped lobster tails. New products should be developed in cooperation with French companies to cater to specific French specifications, either in supermarkets or restaurants.

The food product distribution system in France has undergone far-reaching changes in recent years. Large-scale distributors or supermarket chains {"grandes et moyennes surfaces" (GMS)} play a leading role in the sale of food products. In total, 51 percent of sales occur in the hypermarkets (+ 2500 m²) and supermarkets (400 - 2500 m²). In fresh and frozen fish products, the hypermarkets and supermarkets have over 40 percent of sales, as opposed to 29.7 percent for the specialty fish shops, 20.5 percent for local markets, and 9.4 percent through other distribution channels. Market segments such as deep-frozen and smoked products, the GMS's hold to 60 percent. Traditional fish shops, which sell mainly fresh fish, are losing ground to the GMS's. Most supermarkets contain a specialty shop for fresh fish, crustaceans and molluscs; refrigerator cases filled with fresh prepared dishes and smoked fish; and freezer chests of frozen products, including fish fillets, crustaceans and frozen prepared meals.

The "conventional" restaurant sector constitutes an attractive outlet for fresh lobster products. Almost all French restaurants have a number of fish dishes on the menu, and many offer lobster. Specialized catering firms supply restaurants with high-quality deep-frozen products, and firms market "professional" lines of high-quality products such as frozen sauces, which are seldom available at the retail level. The category of institutional and corporate food services, which includes factory canteens, school cafeterias and the like, is extensively developed in France, and constitutes an attractive outlet for products at the middle, and low-end of the market.

Central purchasing agencies have grown up with the rise of large-scale distributing and specialty stores such as freezer centres and diet-food stores. Not all French purchasing agencies import direct. The seven largest purchasing agencies in France are: Scagel-Scamer-Intermarché; Galec-Lederc, followed by Carrefour-Euromarché; Auchan; Promodes-CAP-Continent; SCA-Monoprix; and Casino.

GERMANY

The demand for fish and fish products in Germany continues to grow. Fish consumption per capita has been steadily rising over the past few years, from 11.6 kg in 1983 to a record high of 14.8 kg in 1992, thus clearly exceeding the worldwide average per capita consumption of 13.3 kg. Total consumption, with 1.2 million tonnes in 1992, for the third time in a row exceeded the 1 million tonne level. Within German domestic consumption, over 80 percent was imported, making Germany a major market for suppliers of fish and fish products. Over 80 percent of German households have freezers, and the number of microwave ovens reaches over one third of German homes. This has contributed to a big surge in the sale of frozen fish products, which in 1992 accounted for 23 percent of all fish consumption.