

Research into lobster growth rates and growth prediction continued in 1993/94. Results from research into the relationship between male growth and female fecundity, collected over a six-year period in six different fishing areas, suggests that fast or slow growth in any one year is a coast-wide phenomenon. This might therefore make female fecundity a good predictor of male growth, which takes place some six months after females become ovigerous.

The West Coast rock lobster quota in South Africa is split up by area, there are nine areas stretching from the Orange River to False Bay. In contrast, the South Coast rock lobster quotas are industry based, with Premier and Hout Bay Fishing having the largest quotas on the South Coast. Quotas do have a secondary market, and so-called "paper quotas" are known within the South African industry.

South African Lobster Quotas

{Tons}

<i>Quota Area</i>	<i>1991</i>	<i>1992</i>	<i>1993</i>
West Coast Rock Lobster	3,790	2,400	2,200

Source: South African Department of Fisheries

Total landed value per nominal ton increased in 1993 for both West Coast rock lobster and South Coast rock lobster. West Coast rock lobster was valued at R\$22,000 per ton in 1993, up from R\$20,000 per ton in 1992 {10 percent}. South Coast rock lobster was valued at R\$45,000 per ton in 1993, up from R\$40,000 per ton in 1992 {12.5 percent}.

The wholesale value of all South African lobster production equalled R\$138,000 in 1993, an increase from R\$134,922 in 1992 {2.5 percent}. During 1993, whole frozen, cooked lobster led the way at R\$52,563 {1,163,670kg at R\$45.17 per kilogram}; followed by frozen tails at R\$47,195 {432,657kg at R\$109.08 per kilogram}; live lobster totalled R\$29,351 {557,235kg at R\$52.67 per kilogram}; and, whole frozen, raw lobster at R\$9,161 {213,925kg at R\$42.82 per kilogram}.

South African Lobster Production

Wholesale Value {R\$,000}

<i>Product Form</i>		<i>1992</i>	<i>1993</i>
Whole frozen, cooked	{R\$45.17/kg}	53,870	52,563
Frozen tails	{R\$109.08/kg}	41,960	41,960
Live	{R\$52.67/kg}	25,812	29,351
Whole frozen, raw	{R\$42.82/kg}	13,280	9,161
South African Totals		134,922	138,270

Source: FAO/Economic Section: Chief Directorate of Sea Fisheries

ZIMBABWE

Zimbabwe has a relatively well developed local food processing sector and consumers have a reasonable choice of products on the store shelves. There are some luxury frozen food and seafood items imported {including lobster products}, principally fish and seafood products from South Africa and Namibia. Fish and seafood imports are not prohibited, but are significantly constrained in Zimbabwe by a serious scarcity of foreign exchange, which in turn makes imported seafood products very expensive.

As a result of the above circumstances, there is only a limited luxury seafood market in Zimbabwe, which is dominated by South African, and more recently, Namibian firms. Fish and seafood products from these countries are imported by only a few local Zimbabwe companies. Because of the proximity of South Africa and Namibia to the Zimbabwe market, it will be very difficult for international lobster exporters to penetrate the local market with imported lobster products.