

POLAND

Poland imported approximately 120,000 tons of fish and seafood during 1993, with Norway, Holland, Great Britain and Russia as the principal suppliers. Consumption of lobster in Poland is almost negligible, largely to its status as a highly luxurious product. There is minimal consumption of lobster amongst the public, and lobster rarely available in retail stores. If lobster were to be imported into Poland, the most probable channel would be through the local fish importers and distributors already in business. Any lobster promotional activities in Poland must start from scratch, due to the unfamiliarity of the product to local consumers. The best possibilities exist in targeting the high class restaurants in major hotels which would at least provide a determination if limited demand exists.

PORTUGAL

Portugal can be described as a relatively stable and conservative market with a well established demand for specific products and product forms. Portugal is one of Europe's largest consumer of fish and seafood products, with per capita consumption of some 46.6 kilograms in 1992. Total size of the Portuguese market was estimated at 533,144 tonnes for 1992, of which 295,684 tonnes were supplied by domestic catches (made in both Portuguese and international waters) and some 237,460 tonnes by imports. The total market in Portugal for lobster is about 1,000 tonnes per year. Domestic lobster landings have dropped from 737 tonnes in 1988, to 117 tonnes in 1993. Over the same period, the value of landings has decreased from PTE\$1.2 billion in 1988, down to PTE\$318 million in 1993. Over the last five years, consumer prices in Portugal for lobster are reported by the local Portuguese trade to have increased from PTE\$6,000-PTE\$7,000 per kilogram in 1998, up to PTE\$13,000-PTE\$14,000 per kilogram. The live lobster market in Portugal is served by a few specialized importers and distributors. Sales of frozen lobster products are handled by a number of frozen seafood importers and distributors.

The Portuguese have a clear preference for live lobster, with the European *Homarus* spp. and rock lobster the favourite species. Live product is in high demand for restaurants. Lobsters are also marketed in frozen form [whole and tails], but the volume of sales is rather small. Frozen lobster and lobster products are used in the retail and foodservice sectors, with the most common size [in both live and frozen forms] 500-1500 grams. Canned lobster meat consumption is very low in Portugal, and therefore opportunities for imports are almost negligible. Primary import sources of supply for lobster products are: France, Cape Verde, Brazil, Mozambique, Canada and Spain [live]; and Cuba, France, Spain, India, Canada, the United States and Kenya [frozen products].

Portuguese Lobster Imports

{Kilograms}

<i>H.S.</i>	1989	1990	1991	1992
0306.1100	757	1,882	1,477	2,593
0306.1210	—	622	101	62
0306.1290	7	—	19	42
0306.2100	100	526	778	778
0306.2210	213	368	457	412
0306.2291	—	3	20	20
Total Imports	1,077	3,401	2,852	3,907

Source: TROIA-Portuguese Foreign Trade

SPAIN

Spain is the European Community's largest consumer of fish products with a per capita consumption of over 31 kilograms per annum. Statistics released by the Spanish Ministry of Agriculture, Fisheries and Food indicate that in 1991, Spaniards consumed 880,324.5 pesetas per capita of fish products in their food purchases which represented 11.8% of total food purchases for the year. Lobster products are developing a greater acceptance amongst Spanish consumers. Profound changes in consumption patterns have occurred in recent years, as Spaniards rapidly adopt the more diverse eating habits and taste preferences evident in other western European countries. Increased living standards, combined with an increase in female participation in the workforce, has helped create a growing demand for new products and species, as well as greater demand for prepared and luxury seafood products, including lobster.