

FINLAND

Finnish consumers are among the largest consumers of fish per capita in the world, 20kg per person on average. In 1992, Finland imported 30,000 tonnes of fish and seafood products, equalling approximately 30 percent of total consumption. In comparison, Finland only exported 2,200 tonnes of fish and seafood in 1992. Finland is a marginal market for lobster products, largely because lobster is not harvested off the shores of the Baltic Sea, and thus is not a traditional Finnish delicacy. The peak year for lobster consumption in Finland was at the height of the economic boom during 1989, when total lobster imports were 42 tons, of which 36 tons was source from Canada. Of the total imports, 26 tonnes were frozen "popsicle pack", nine tonnes canned, and six tonnes fresh lobster.

Lobster import statistics for 1992 were as follows: H.S.0306.11 (>1 tonne valued at Cdn\$1,000); 0306.12 (11 tonnes valued at Cdn\$143,000); 0306.22 (5 tonnes valued at Cdn\$105,000); and 1605.3 (1 ton valued at Cdn\$25,000). Major competing products are domestically caught crayfish, which is also imported frozen from the United States, and fresh from Russia. Lobster products are primarily consumed in restaurants in Finland. Due to low consumption and limited volume, lobster products are not imported direct, but rather through wholesalers in countries where consumption levels are greater (eg. live lobsters from France, and frozen from Sweden). Canadian lobster products have captured a strong position in the Finnish market. Lobster can be imported without a permit, but demand is limited.

FRANCE

The market for lobster, a species considered to be traditional with French society, is large and well-established in France. A decline in the French catch, combined with an increase in lobster consumption, imports have increased in volume. There are two distinct markets for lobster in France: live and frozen. Live lobster is in competition with live rock lobster (red or pink) in the French domestic market. The French market is supplied by Canada, Scotland, Ireland, and the United States. Large, live shellfish (rock lobster and lobster included), are a popular food item, especially during the Christmas and New Year's holidays, often in conjunction with very elaborate recipes. However, the consumption of festive foods began to show the effects of the economic crisis in 1992, after a number of years of steady growth.

Supplies of rock lobster entering the French market have diminished of late, and have become very expensive (approximately Cdn\$100 per kilo, wholesale), to the benefit of American and European lobster. *Homarus americanus* from the United States and Canada is considered to be of inferior quality to the European lobster, and is available at a much lower price. Availability and relatively low price, are largely responsible for the sharp rise in imports of American lobster.

Traditional French distribution systems operate through the following intermediaries: an importer, which is often a company in the Rungis market; and, a distributor or "final vendor" which sells the live lobster either to the final consumer (an individual), or to restaurants. This system is followed throughout much of the year, and the distributor may be a traditional fish shop or a supermarket. Many of the large supermarket chains sell live lobster at the end of the year at loss-leader prices (i.e. with no margin for the company). Some restaurant chains import direct from foreign countries. Two types of product coexist in this market: lobsters that arrive direct from international markets, and lobsters which have spent time in tanks in Brittany, the latter is often consumed in restaurants.

French Lobster Imports

{MT}

| Product | 1989 | 1990 | 1991 | 1992 |
|------------------------|-------|-------|-------|-------|
| Lobster, live | 2,500 | 3,200 | 3,900 | 3,600 |
| Lobster, whole, frozen | 2,000 | 2,100 | 2,500 | 1,600 |
| Lobster, frozen pieces | 600 | 500 | 400 | 400 |

Source: EEC Statistics

Generally, imports of frozen lobster products to France are on the decline, due to changing preferences in the festive products selected by the supermarkets. For a number of years, the popularity of "popsicle pack" increased significantly, because it can be sold as "lobster" at a fairly low price. As the product became more common, it became less beneficial for the supermarkets to put on sale.