

SOUTH AMERICA

ARGENTINA

Each year, Argentines consume approximately 6.4 kilograms of fish and seafood products per capita. About 95 percent of the fish and seafood products consumed is supplied by the domestic fishing fleet, and the remaining 5 percent imported mainly from Spain and Chile. There is no domestic supply of lobster in Argentina and all local consumption is achieved through importation. Argentina consumers have traditionally been marginal consumers of fish and seafood products, thus lobster consumption is extremely low. Primary consumers of lobster products are up-scale restaurants and specialized high-quality specialty seafood establishments.

Lobster products are imported both live and frozen, mainly from Chile, Ecuador, Brazil and the United States. However, the quantities imported are minimal and purchases are not on a regular basis. It is estimated one metric tonne of lobster is imported per month, with 900 kilograms of the total consumed in Buenos Aires and its surrounding suburbs. Consumption of lobster has been relatively stable over the years except for the high inflation periods {1989-1990}, when lobster imports were almost stopped. Retail prices for lobster products are very high and range from a low of US\$30.00 per kilogram, to US\$70.00 per kilogram, with prices even higher in Argentine restaurants. Both frozen and live lobsters are imported by 2-3 specialized Argentine importers of fishery products, who distribute the product direct to retail outlets and consumers. Argentine importers make purchase decisions as to the origin of the product based on price, rather than quality. Awareness of quality standards and grading for lobster is limited, and lobster is considered a status symbol, rather than a specialty seafood item. Opportunities for international lobster exporters are limited due to low consumption and negligible import potential for lobster in Argentina.

BRAZIL

Despite a huge coastline of approximately 7,000 kilometres, including 200 miles of sea boundary, Brazil has a relatively low fisheries harvest. Brazil is the 20th largest fishing nation with landings in the order of 850,000 MT per year. Brazil is not a traditional fish and/or shellfish importer, except for non-domestic species which are considered luxury products. Consumption of non-domestic species is oriented to the higher social and economic levels of consumers who can afford paying more for top-quality products. Consumption of lobster tends to peak in the holy seasons of Christmas, Easter and Holy Week. Figures for 1991 and 1992 indicate lobster imports into Brazil virtually disappeared during this period, whereas Brazilian exports of frozen lobster products reached 4,363 MT in 1991, and 1,082 MT in 1992. Brazil is a major exporter and consumer of lobster products {specifically rock lobster}, due to its long coastline and resulting continental shelf.

VENEZUELA

The Venezuelan lobster sector is managed by a group of small independent fishermen who catch the product off the Venezuelan coastline. However, intermediate traders with transport and refrigeration facilities create a greater share of the profits by distributing lobsters to the market. Because of this, fresh or frozen lobsters are considered a luxury seafood product for most Venezuelan consumers. Domestic lobster supplies are Caribbean rock lobster with a long tail and small claws, and very rich in flavour. Domestic lobster production and consumption is approximately 2,000 MT per annum. There are negligible imports or exports of lobster products, and there is a closed catch season of six months running from May 1 to October 30. Primary markets for lobster products are in the metropolitan cities where higher purchasing power exists amongst the population.

The distribution system for lobster in Venezuela proceeds from fishermen to transporters, then on to distributors, retailers and the final consumer. Consumer prices at retail stores are approximately 150-180 percent above the prices paid to domestic lobster fishermen. Opportunities are abundant for international lobster exporters {fresh; frozen; or canned}, largely due to significant increases in tourism and an expanding hotel and restaurant trade in the area. Aquaculture is very new and developing in Venezuela, and most domestic companies are looking to increase production and elevate profits from new seafood species and products. Moreover, Venezuela is emerging as an important trading nation and a growing tourist destination, and international lobster suppliers should target the Venezuela market during the closed catch season.