Global Market Opportunities Review

Lobster

GLOBAL MARKET OPPORTUNITIES REVIEW

LOBSTER

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INTERNATIONAL MARKETING BUREAU
EXTERNAL AFFAIRS AND INTERNATIONAL TRADE CANADA

Participants in the Preparation of this Review

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Industry, Science and Technology Canada	Canadian Atlantic Lobster Promotion Association (CALPA)
Fisheries and Oceans Canada	

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TABLE OF CONTENTS

LIST OF APPENDICES

PREFACE

The purpose of this study is to provide a review of the global marketing opportunities for lobster. It also offers an assessment of the Canadian lobster industry, examines it's strengths and suggests a course of action for governments (federal and provincial) to facilitate industry in order to develop a coordinated export marketing strategy for the benefit of all the stakeholders.

The **REVIEW** includes an in-depth assessment by Trade Commissioners in 49 Canadian trade offices abroad of conditions and trends in their respective countries. The **REVIEW** will assist individual firms, associations and consortia to develop and implement export marketing plans by providing practical information and leads for each country.

Note:
Information contained in this REVIEW has been gathered from a wide variety of sources. External Affairs and International Trade (EAITC) has taken great care in presenting the information but does not guarantee the accuracy of the information, not the absence of errors and omissions.

EXECUTIVE SUMMARY

Canada is the world's largest producer and exporter of lobster. In 1992 total Canadian landings exceeded **46,000 tonnes**, approximately **30% of total global landings.** Almost 90% of Canadian production was exported, with a total value in excess of **$300 million.** The U.S. accounts for **70%** of Canada's lobster exports, with a value exceeding **$200 million Cdn.**, followed by Japan and the EC.

Canadian lobster (Homarus Americanus) is only found in the northeast waters of Canada and the United States. This species competes with other species such as the European lobster, crayfish and rock lobster in the global market. The Canadian industry comprises over **11,000 fishermen** and **250 lobster processing establishments and exporters.** However, about a dozen of the firms account for the majority of our exports.

The Canadian lobster industry is noted globally for its resource management, health and inspection services and its image for producing a quality, pollution-free product. Exports are primarily in the live form, although other opportunities exist for innovative product forms in niche markets. There may be some benefit in increasing efforts to develop a generic Canadian image, particularly with respect to the marketing of products forms other than live lobster.

A detailed survey on opportunities in several regions of the United States and thirty-seven other countries is contained in this document. This information has been supplied by forty-nine trade commissioners from major fish importing countries together with **full names and addresses of major importers and buyers.**

CANADIAN LOBSTER IN A GLOBAL CONTEXT

1. SECTOR DESCRIPTION

Production of lobster (homarus Americanus) is confined to northeastern North America. In Canada, this means the five Atlantic provinces Quebec, Prince Edward Island, New Brunswick, Nova Scotia and Newfoundland. The United States is the only other producer of this species of lobster with which the Canadian lobster industry must compete in North American and other markets.

Other competing species include:

European lobster (*Homarus gammarus*) are found in the UK and Scandinavia. Scampi also belong to the true family of lobsters (*nephropidae*) being marine and having large claws on the front pair of legs.

Crayfish (*Astacidae* and *Cambaridae*) are found in Northern Hemisphere waters. *Parastacidae* are found in the Southern Hemisphere in various countries. Like true lobsters, crayfish have two claws but are confined to freshwater.

Rock lobster (*Palinuradae* spiny lobster) are found in Cuba, Columbia, S.Africa, Australia and in a range of other countries where water is temperate. This species lacks large claws on the first pair of legs.

Shrimp (Various species) are found in many locations.

GLOBAL MARKET AND CANADA'S SHARE

Total global lobster landings (all species) in 1990 were 152.7 tonnes. Canada is the world's largest supplier of all lobster species. Canadian landings have increased steadily from 19,000 tonnes in 1978 to over 46,500 tonnes in 1990. The United States imports over 70% of Canadian lobster exports with a value exceeding Cdn.$ 200 million.

WORLD LOBSTER LANDINGS BY SPECIES (000 MT)

	1986	1987	1988	1989	1990
Spiny	68.8	65.4	67.3	61.1	62.3
American	58.9	60.1	62.5	67.1	74.2
Rock	16.4	17.3	13.6	9.3	13.6
European	1.8	2.1	2.1	2.1	2.6
TOTAL	**145.9**	**144.9**	**145.5**	**139.6**	**152.7**

Source: FAO Year Book, Fisheries Statistics, 1990

The principal product forms include live, whole frozen (in brine), "popsicle packs", canned and portion-controlled vacuum packed meat, spreads (paté, mousse), prepared dinners. Lobster size dictates to a large extent the form in which lobster is marketed.

LANDINGS: 10 MAJOR PRODUCING COUNTRIES (000 MT)

	1986	1987	1988	1989	1990
Canada	38.0	39.4	40.4	43.1	46.5
USA	24.0	23.3	25.3	27.2	27.6
Australia	15.9	16.5	16.2	14.5	18.5
Cuba	11.7	12.8	11.7	11.2	8.0
Brazil	6.9	6.9	8.5	6.2	6.2
South Africa	6.1	7.1	6.3	4.7	5.1
Bahamas	3.6	4.6	5.1	6.2	5.8
New Zealand	5.3	5.0	1.2	3.7	3.1
Mexico	2.3	2.4	2.3	2.4	2.3
Honduras	5.3	1.5	1.6	1.5	1.3
Total	**119.1**	**119.5**	**118.6**	**120.7**	**124.4**
Global Total	**145.9**	**144.9**	**145.5**	**139.6**	**152.7**

Source: FAO Year Book, Fisheries Statistics, 1990

CANADIAN STATISTICS

In 1991, there were 11,545 Canadian lobster fishermen producing a landed value of over $ 250 million of which the vast majority is exported at a value of over $ 330 million.

LOBSTER LANDINGS BY PROVINCE (1991)

	Metric Tonnes	Value
Nova Scotia	23,332	152,249,000
New Brunswick	8,005	36,072,000
P.E.I.	9,707	46,224,000
Quebec	3,483	17,892,000
Newfoundland	2,922	15,862,000
Total	**47,449**	**268,299,000**

In the Atlantic provinces, the estimated lobster production in 1991 was as follows:

	Metric Tonnes	Value
Fresh in shell	28,000	233,360,000
Frozen in shell	4,640	39,800,000
Fresh meat	30	840,000
Frozen meat	3,200	65,440,000
Canned	160	4,100,000
Others	1,740	15,470,000

The 1991 Canadian per capita consumption of in shell, fresh and frozen lobster was 0.04 kg and the per capita consumption of fresh and frozen meat was 0.03 kg.

CANADIAN LOBSTER EXPORTS (1991)

Rock Lobsters (0306.11)		
United States	3.2 tonnes	$300,000
Lobsters nes, frozen, in shell, boiled (0306.12)		
United States	1,828.5 tonnes	$35,419,000
France	2,409.5 tonnes	$24,312,000
Japan	1,249.7 tonnes	$13,541,000
Belgium	3.2 tonnes	$3,948,000
Total	5,490.9 tonnes	$86,457,000
Lobster nes, not frozen, live, in shell, including boiled in shell (0306.22)		
United States	15,885.6 tonnes	$133,543,000
France	1,199.3 tonnes	$13,164,000
Netherlands	1,018.5 tonnes	$10,408,000
Japan	977.9 tonnes	$13,161,000
Total	19,081.3 tonnes	$194,207,000
Lobsters, prepared or preserved (1605.30)		
United States	2,608.3 tonnes	$52,069,000
France	128.9 tonnes	$857,000
Japan	85.0 tonnes	$1,432,000
Total	2,822·2 tonnes	$54,358.000

CANADIAN LOBSTER IMPORTS (1991)

Rock lobster & other sea crayfish, frozen in shell or not, including boiled in shell (0306.11)		
Cuba	177.6 tonnes	$5,508,000
Bahamas	125.4 tonnes	$4,038,000
United States	90.7 tonnes	$2,258,000
Taiwan	74.2 tonnes	$1,100,000
Total	467.9 tonnes	$17,527,000
Lobsters nes, frozen, in shell, boiled (0306.12)		
United States	75.1 tonnes	$1,587,000
Total	83.8 tonnes	$1,768,000
Rock lobster & other sea crayfish not frozen, in shell or not, incl. boiled in shell (0306.21)		
Total	11.9 tonnes	$98,000
Lobsters nes, not frozen, in shell, including boiled in shell (0306.22)		
United States	2,576.2 tonnes	$19,459,000
Total	2,583.1 tonnes	$19,518,000
Lobster, prepared or preserved (1605.30)		
United States	70.8 tonnes	$716,000
Total	104.5 tonnes	$1,338,000

2. MARKET PROSPECTS

The lobster sector in Canada presents a number of special factors regarding exports:

(1) New technologies are becoming available that will improve the handling, packaging, transportation and distribution of lobster products.

(2) The lobster industry, with the possible exception of PEI, does experience some variation in cyclical supply. However, overall landings have been fairly stable over the past three or four years.

(3) Industry has identified lobster as a product which would benefit from generic market promotion. To that end, CALPA is developing a generic export marketing plan.

Seafood consumption is increasing world-wide with population growth and demand for alternate sources of protein. The consumption of luxury items including lobster, especially in the hotel and restaurant industry, continues to grow. In Europe, consumption of lobster is also closely linked to traditional events e.g. Christmas and Easter holiday periods. In northeast North America, live lobster demand is tied to the summer vacation and tourist seasons; supply is regulated by the harvesting season.

The seafood market generally has expanded from a series of regional markets to a global marketplace. This evolution makes the generic promotion of lobster all the more important. The USA, Japan and Europe continue, however, to hold the best potential for growth in demand.

Lobster is perceived as an expensive luxury product in most markets. Live and whole frozen lobster is mainly consumed in restaurants due to perceived difficulties in preparation as well as the practical logistical realities of preparing lobster at home.

In 1990-91, fluctuation of the Canadian dollar, the application of a number of unfavourable trade measures and stiffening competition from American exporters, prompted the Canadian industry to reassess its position in world markets. This has led to more emphasis being placed on value-added and further processed lobster products

To meet growing food service demand for value-added, portion controlled lobster meat, industry has developed a vacuum-packed form of the product which is replacing the more traditional canned product. This has caused a considerable boost in sales, particularly in the U.S.

In their efforts to promote sales of live lobsters domestically and increasingly in international markets, some provinces are encouraging the use of distinctive claw bands (e.g. Quebec uses a blue fleur de lys band while Nova Scotia favours a maple leaf logo). While both approaches have proved successful, noticeably in our domestic markets, in the long run, the use of national rather than provincial bands might be more effective in international markets.

More accurate information regarding foreign seafood consumption trends in general, and lobster in particular, is required. Demographics and consumer concerns and preferences in individual markets have changed dramatically in the past five years, a trend which is expected to continue.

For seafood products, including lobster, consumers are concerned not only with prices but increasingly with considerations such as product safety, health benefits, environmental factors, selection and preparation methods. Brand identity remains important for importers and consumers.

Lobster consumption is influenced by consumer income levels, geographic location, family traditions and cultural dietary patterns. Significantly different patterns are evident among countries concerning how, where, in what manner and in what form lobster is consumed e.g. with dill in Finland, "popsicle packs" in France or in seafood specialty restaurants in Switzerland.

Air Canada, Canadian Airlines, as well as US and foreign airlines are shipping live product. Where direct air freight service is available to major gateways, the scope for enhanced sales of live lobsters is significantly increased (e.g. KLM Halifax-Amsterdam service). The reductions in air freight availability from Atlantic Canada by KLM and Air Canada has exacerbated the existing problem. High transportation costs and mortality rates are prime marketing considerations necessitating improved distributing and handling facilities in buyer countries.

3. CANADIAN COMPETITIVE STRENGTHS

A well-managed fisheries regime in Canada, developed over many decades, holds the prospect of providing a stable supply of lobster on a sustainable basis. This contrasts with the situation in New England where depletion of the resource is becoming evident.

The effective management of the Canadian lobster resource eliminates problems of 'by-catch', associated with other fisheries and is consistent with Canada's commitment to protecting the ecosystem in the lobster harvest.

A hallmark of the Canadian lobster is a high quality, hard-shelled product with excellent image as to source, clean environment, rigorous quality standards and the plant health inspection system.

Having a broader range of available lobster sizes than available in the US, the only competing supplier of Homarus Americanus, provides more flexibility to serve special market niches.

Lobster is high in protein, has important trace elements and essential amino acids, is low in cholesterol or saturated fats and virtually calorie-free, depending on the method of preparation. As such, it holds attraction for a growing number of consumers preoccupied with the health benefits of food products, a fact which should be emphasized, particularly in Europe.

Canadian exporters have demonstrated a capacity to adapt to varying market conditions. Examples are the introduction of processed product innovations in recent years involving an increased emphasis on specialty meat products (e.g. scored lobster claws to compete with scored crab claws) and the introduction of new packaging concepts and techniques.

Similarly, development of frozen lobster products provides scope for the creation of brand identity. It also alleviates oversupply and some transportation problems and cuts across the issue of seasonality.

Proximity to, and ability to access the large US market is a significant advantage for Canadian suppliers.

4. SECTORIAL MARKETING AND ACCESS ISSUES

4.1 MARKETING CHALLENGES

Since the US is our sole competitor for homarus Americanus, both in the US domestic market and offshore, movement in the Canadian dollar has a rapid impact on our competitiveness. Competition from lower priced shellfish (snow crab, Alaskan snow crab and shrimp) is increasing.

Canadian industry, with many small firms, is vulnerable to a lack of coordination in its marketing approach. The formation of CALPA and development of a generic marketing plan presents an opportunity to address these problems.

A tendency to market lobster simply as a commodity without more sophisticated marketing techniques, (including packaging) undermines its appeal and consequently, full profit potential. The subject of upgrading and added value must also be addressed in order to exploit the full economic value of lobster.

Limited direct transportation links, especially by air, into many overseas markets represents a problem for exporting live Canadian lobster with minimum losses through mortality. Boston has better air connections, resulting in significant trans-shipments to Europe.

The availability of tanks necessary to support live sales is limited, or absent, in many markets although this situation appears to be improving.

An effective distribution system in the US, beyond the northeast, is not yet well established.

Except in New England, a strong Canadian identity at the consumer level is not evident in the US. Canadian lobsters are often sold as "Maine" lobsters, with which consumers identify. Canadian hard-shell lobsters are sometimes mixed with American soft-shell varieties. There is also evidence that some US brokers sell imported Canadian lobster as US product.

Unstable prices, combined with fluctuations of supply, affect the growth of live lobster consumption in the US restaurant and food-service trade. Many US restaurants use lobster on menus as a traffic builder, or sell as a loss-leader or for special promotions when supply is abundant and prices depressed. The use of holding tanks is only seen as a partial solution due to the high capital cost.

Consumer education is required in many markets in order to dispel the notion that lobster is an exotic food dish, for special occasions only.

4.2 ACCESS AND TRADE BARRIERS

In many markets, tariffs and NTBs (phytosanitary, packaging & labelling requirements, inspections) are not a major factor as there is no particular call for protecting indigenous production of lobster. Some degree of tariff protection, however, exists in some areas vis à vis competing products e.g. rock lobster. Given the importance of Canadian exports of lobster and lobster products, access impediments in particular jurisdictions have been identified and are being pursued in the MTN.

TARIFFS. To the extent tariffs are reduced or eliminated, especially for value-added forms which generally attract higher rates, prices for lobster will become somewhat lower in markets of interest, making it more competitive relative to other competing products. Similarly, the reduction of tariff margins of preference (e.g. EFTA/EC preferences, GSP/GPT for many developed countries providing better access for warm water species) confers an improved price advantage for Canadian exporters.

NTBs. Phytosanitary regulations and size limitations represent the most difficult access problems facing Canadian exporters in many markets. In the US, carapace size restrictions for live lobsters and listeria is an ongoing issue for processed products along with delays in inspection. In the Nordic countries, Sweden has minimum carapace size requirements of 22 cm for live imports and Norway prohibits the entry of live product unless it is cooked immediately upon importation, prior to entering Norwegian commerce. This arises from concerns over the transfer of gaffkemia disease from imports to domestic stocks. The draft MTN Agreement on Sanitary and Phytosanitary Measures (SPS) will provide scope to reduce the impact of some of these measures.

In Korea and the PRC, slow customs and rigorous inspection systems have adversely affected imports although it appears that Korean customs clearance procedures have recently improved.

4.3 COMMERCIAL PRACTICES AND CONSTRAINTS

The harvesting seasons vary from region to region with the peak period being from May to July. This does not coincide with peak periods of European demand for live lobsters during the Christmas and Easter holidays. Increasing availability of holding tanks can mitigate this to a degree but will require significant investment in target markets of importance such as Japan or the UK.

Canadian product is sometimes sold as American due to a lack of identity as to the real origin. This loss of identity at the border may, however, be an advantage in some circumstances.

There are approximately 250 exporters of Canadian lobster and lobster products, but few firms have the capacity to take direct advantage of opportunities in international markets. CALPA has a mandate to promote lobster products generically and in varied forms so as to stimulate demand for the product. In pursuit of this goal, CALPA will need the ongoing support of the provincial and federal governments to ensure that the Canadian lobster image remains strong in all major markets.

Canadian exporters face major constraints in terms of access to effective transportation services, especially for shipments of live lobster. Buyers sometimes call for less than container sized lots and it may be difficult to fill these orders. The necessity to trans-ship, usually through Boston with its better links to major markets, can increase handling and freight rates as well as mortality levels. Boston also serves as a major distribution point for shipments to other destinations in the US.

5. EXPORT MARKETING STRATEGY

Focused Market Priorities

A longer-term marketing strategy, taking into account shifting market demand, new competitors or demographic changes, is essential to international success. The US market for Canadian live lobster has long established roots and accounts for 80 % of Canadian exports of live lobster. Demand for live and processed lobster in Japan and the EC countries also offer significant opportunities for expansion. However, this does not preclude the need to pursue other markets which have the potential for development. Live lobster requires efficient and reliable transportation with suitable holding tanks and storage facilities that requires significant capital investment.

Generic Market Promotion

The question of a Canadian generic marketing approach frequently arises since most Canadian lobster entering the US is absorbed as 'Maine lobster' and may be re-exported as a US product. The establishment of a Canadian generic image for exports to Japan and the EC countries will require a significant additional commitment to promotional efforts aimed at both the consumer and hotel, restaurant and the institution trade. This will create a distinctive image for Canadian products and establish customer-brand and product recognition and loyalty.

Quality Image

To enhance the quality image of Canadian lobster products a promotional programme developed in consultation with CALPA and the provincial governments is required. The programme should feature the existing Quality Management Plan (QMP) encompassing all phases of production, processing and delivery to market. Additionally, good video material and promotional aids are needed to feature the environmental and food safety attributes of Canadian lobster. The promotional programme should be flexible.

Improve the Delivery of Market Intelligence

Industry has indicated a need for better and more timely commercial information and intelligence on developments and sales opportunities in foreign markets. More government effort is to be targeted at providing the private sector, directly and through industry associations, with information on market conditions, consumption trends, market access factors, distribution channels, and business contacts with respect to lobster in general, industrial species or specific products.

Raise the International Profile of Canadian Lobster and Products

We need to heighten the awareness, through education of consumers, institutions and retailers, that Canada has a good supply of a well managed resource of consistently high quality lobster. Broadened sector participation in strategically selected international events, such as seafood trade shows, trade missions, seminars and conferences, should be pursued to improve industry's global presence and market share. We also need to improve the visibility of Canadian lobster at the retail level with attention to packaging and point-of-purchase material as well as dispel perceptions of lobster as a luxury product.

Funding Mechanism

Strong and securely financed associations are key. Consideration will need to be given to stimulate the adoption of funding mechanisms, such as levies or check-offs to support marketing initiatives.

Partnerships

The success of the promotional plan will depend on cooperation between federal government departments and agencies such as EAITC, FAO, ACOA as well as CALPA and the provincial governments to ensure that our collective efforts are complimentary and consistent in facilitating the lead taken by industry. This programme must be factored into the International Trade Business Plan.

Market Access
It is not sufficient to only negotiate access to new markets, but existing access must also be vigorously pursued. Therefore efforts will focus on defending existing levels of market access and removing such barriers as tariffs, tariff rate quotas, import quotas, health and phytosanitary restrictions.

Strategic Alliances
The impact of globalization, and increasing competition may require the Canadian lobster sector to pursue strategic partnerships or investment and marketing alliances in order to secure markets for Canadian products, particularly for value-added products.

With a view to determining more precise market opportunities and constraints relating to all forms of Canadian lobster exports, the Agri-food, Fisheries and Resources Division of EAITC has produced the attached geographic survey, based on data provided by Trade Commissioners in 49 EAITC posts abroad. This survey details the opportunities and constraints for the export of lobster to the countries listed. It also lists importers and contacts.

REFERENCES/ACKNOWLEDGEMENTS

References:

FAO Yearbook
International Trade Business Plan

Acknowledgements:

The Department of External Affairs and International Trade wish to acknowledge the assistance given in preparation of this review by;

Industry, Science and Technology Canada
Fisheries and Oceans Canada
Canadian Atlantic Lobster Promotion Association (CALPA)

Publications available from Info Export Centre:

Canadian Fish and Seafood Exporters Sourcing Guide
World Directory of Seafood Importers
Capability Sheets
Species Fact Sheets
Guidelines for Canadian Seafood Exporters

Other Global Market Opportunity Reports available:

Salmon
Non-Traditional Seafood Species
Aquaculture
Fish and Seafood - General

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UNITED STATES

1

ATLANTA

SUPPLY & CONSUMPTION

The Consulate General in Atlanta covers the states of North Carolina, South Carolina, Tennessee, Mississippi, Alabama, Georgia, Florida, Puerto Rico and the U.S. Virgin Islands. Many of these states also enjoy an active tourism industry which augments considerably a population base of 43 million people. Retail food sales are expected to reach US$78 billion for 1992. Estimates for foodservice sales vary according to source, however it is probable that restaurant sales will approach US$83 billion while fast food sales should reach an additional US$78 for 1992, each representing increases over 1991. It is difficult to estimate the imports of Canadian lobster into the territory. All lobster is sold as "Maine lobster", and the public is encouraged to think in those terms. Restaurants sell lobster (generally in the form of tails, but do not differentiate between the *Homerus Americanus* species and the other types (rock and spiny etc.) that come from other areas of the world.

As of December 1992, live lobster is sold at approximately US$6.95/lb to US$7.95/lb at retail and on occasion a supermarket chain will have a loss-leader sale at about US$3.99/lb. A distributor will sell it to the supermarket at a 30% (approximate) mark-up. The biggest competitor to Canadian frozen lobster tail is the Caribbean lobster tail which most distributors buy from brokers at about US$11.95/lb, in a falling market. If the distributor can buy direct from the supplier in the Caribbean the price will be in the neighbourhood of US$9.00/lb. Australian and New Zealand lobster tails are at the US$16.00/lb level and are making inroads into the foodservice market. Demand for frozen tails from Canadian sources is well developed, when available, with pricing varying according to market forces. Media attention on the safety of seafood may adversely affect the sale of lobster, if this issue continues on the front burner. The U.S. FDA and the National Oceanic and Atmospheric Administration (NOAA) have received increased funding which will strengthen their inspection procedures in all areas of seafood imports as well as domestic production. Informed sources suggest that it is inevitable that safety regulations will have a significant impact on the seafood industry in the near term.

DISTRIBUTION SYSTEMS

Boston appears to remain the classic point of origin of live lobster, hence the accepted "Maine lobster" nomenclature. However, some suppliers are increasingly finding ways to ship on a direct and continuing basis to some markets in the Southeastern U.S., as high transportation costs impact considerably on an already expensive commodity. Distributors in high density population areas typically hold lobsters in tanks and deliver them to either retail customers or to foodservice accounts on a daily or weekly basis. Retail customers have tanks in the seafood section into which they keep stock to meet the next three to five days sales. The tank count varies according to the expected traffic. Sales often feature live lobsters in a retail environment, however value-added lobster products are rarely sale items. Value-added lobster products enter the usual food distributor channels or are sold direct to the retail chain, either in proprietary packaging or under private label.

PROMOTIONAL ACTIVITIES

The Consulate General-Atlanta has scheduled two incoming missions to Atlantic Canada as well as other missions to the food/seafood industry in Toronto and Montreal, all in fiscal year 1993-94. The following important foodservice events take place in the Post territory: 1) Southeast Hospitality and Foodservice Expo, October 1993 in Atlanta, Georgia; 2) Food and Foodservice Equipment Show of the Caribbean, April 1993 in San Juan, Puerto Rico; and 3) Solo Food Show (Canadian products only), December 1993, in Miami, Florida. The post is fully disposed to cooperating with CALPA or with individual or provincial entities in doing other promotional activities targeted to specific markets.

POST COMMENTS

Opportunities exist for the following lobster products. Live lobsters: direct shipment to distributors, retail chains or restaurant chains. (One medium sized distributor ships 8000 to 15000 lbs. per week in Atlanta). Frozen meat: 2# vacuum packed (very popular and some 5#, 10#, 20# cello. Cuisson Sous-Vide: this is a rapidly growing form of packaging. Smaller hotels are copying the larger ones that have started using Sous-Vide in both their main restaurants and in their room service kitchens. In addition, smaller restaurants that do not have highly trained chefs and cooks have started using these products. It is also starting to be sold over the counter to the discriminating public in specialty stores. Frozen parts: base for bisque, shredded meats for sandwiches and canapes. Frozen tail: the sizes (oz) most commonly used are 2/3's, 3/4's, and 4/5's, with heavy emphasis on the 3/4's.

Programs instituted by CALPA have played a significant role in overcoming the lack of a clear Canadian national image in the minds of institutional buyers. Programs could be targeted to the lobster buying public: 1) special bands and/or identification tags that clearly indicate Canadian origin; 2) establishment of a quality control mechanism which would identify the product as having passed the most stringent quality standards; 3) special promotions with retail chains or restaurant chains which identify the product as Canadian lobster; 4) establishment of a clearing house for information where a chef or a domestic cook could get menus and serving information. This could be in conjunction with an 1-800 number and/or address in magazines aimed at the professional cook and the interested amateur cook.

IMPORTERS/USERS

Bama Fish
3113 Main Street
East Point, Georgia
Contact: Doug Brinsmade

Collins Fish & Seafood Inc.
328 N.E. 70th Street
Miami, Florida 33138
Contact: Buddy Levine
Tel:(305) 751-3711

ComSource Inc.
P.O. Box 724945, 280 Interstate N. Pwy
Atlanta, Georgia 30339
Tel:(404) 952-0871
Fax:(404) 850-1305

F.A.B. Inc.
6400 Atlantic Boulevard
Norcross, Georgia 30071
Contact: Steve Jacobson
Tel:(404) 449-1333

General Mills Restaurants Inc.
6770 Lake Ellenor Drive
Orlando, Florida 32809
Contact: James Salmon
Tel:(407) 851-0370

Harry H. Bell & Sons Inc.
756-28th Street South
St. Petersburg, Florida 33712
Contact: Mr. Terry Riggs
Tel:(813) 327-3474

Lombardi's Seafood Inc.
7491 Brokerage Drive
Orlando, Florida 32809
Contact: Tony Lombardi
Tel:(407) 859-1015
Fax:(407) 240-2562

Offshore Seafood Inc.
5522 New Peachtree Road, Suite C-3
Atlanta, Georgia 30341
Contact: Karl Lindblad

Poseidon Enterprise Inc.
2224 Graham Drive
Charlotte, North Carolina 28273
Contact: Rich LaVecchia
Tel:(704) 588-8700
Fax:(704) 588-8706

Robert Orr/Sysco Food Services
P.O. Box 305138
Nashville, Tennessee 37230
Contact: Tony Moran

Sysco Food Services-Southeast Inc.
555 N.E. 185th Street
Miami, Florida 33179
Contact: Tom McGuire
Tel:(305) 651-5421
Fax:(305) 653-2095

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BOSTON

SUPPLY & CONSUMPTION

New England is a key market for Canadian lobster. The U.S. produces less than 50% of its domestic demand with Canada supplying most of the balance. Over 80% of all lobster product exported to the U.S. is sent to New England. Imports to the U.S. in 1991 were 20,354 tonnes with a value of Cdn$221,332,000, including nine different forms and packing styles. The two major forms were live lobsters, 15,642 tonnes valued at Cdn$129,776,000; and cooked/frozen lobster meat 1889 tonnes valued at Cdn$36,745,000.

PHYTOSANITARY REGULATIONS

Canadian producers of canned cooked, frozen lobster meat have had problems with listeria, a bacteria which seems to only show up in canned products. Whole frozen/cooked lobster has not yet experienced problems with listeria. Most Canadian companies who have had these problems have remedied the situation, however every once in a while there are reports of new cases. Once rejected by the FDA, this product can be returned to Canada to be pasteurized. Although this eliminates the listeria, it may lessen the quality and texture of the meat.

TARIFFS/NTB'S

Difficulties associated with the carapace are unresolved, the current size is 3 1/4 inch. The New England Fisheries Management Council (NEFMC) had voted to delay any further increases at this time, the original plan would have had two more increases to end up at 3 5/16 inches. The U.S. harvesters and processors complained about all the increases, saying that they needed time to evaluate the economic impact on each size increase before another went into effect. The NEFMC voted to delay and prepare a new lobster management plan to the U.S. Secretary of Commerce. The new plan has several areas that are likened to the Canadian plan, such as limiting entry, and closed seasons for all areas of fishing. It has always been known that Canada has these regulations and the landings in Canada have increased over the last 10 years by 100%. In the U.S., fishing has been allowed 12 months a year depending on weather, with summer lobster taken here being almost all soft shell. The soft shell lobsters are not able to be shipped without higher rates of fatalities. If a new management plan is approved by the U.S. Secretary of Commerce, the carapace size will most likely remain at 3 1/4 inches.

POST COMMENTS

Opportunities exist for frozen, raw lobster tails, individually wrapped and sized in one ounce increments. This product is valued at $10-15 per pound and the processor still has balance of the lobster for other production such as claw meat cooked and frozen, salad lobster meat etc. Other opportunities exist in value-added products. U.S. buyers have begun to resist cooked frozen lobster meat in tin cans, thus producers should start producing product in vacuum pack, the same as crab products (ie. one lb poly wrapped and two lb poly wrapped). Another product form with potential is lobster in sauces etc. One major exporter has been very successful in selling value-added products in the territory.

For Further Information Contact:

Canadian Consulate General
Officer: Jack McManus
Three Copley Place, Suite 400
Boston, Massachusetts 02116
Tel:(617) 262-3760
Fax:(617) 262-3415

BUFFALO

SUPPLY & CONSUMPTION

The Consulate General in Buffalo estimates the total market size for lobster to be US$5 million (39 counties of western New York State referred to as Upstate New York). Five U.S./Canadian border crossing points serve the territory: Peace Bridge; Lewiston; Niagara Falls; Alexandria Bay; and Champlain, with the Peace Bridge being the second busiest in the U.S. The two most popular forms of purchasing lobster are: 1) live-received by air; and 2) frozen-by truck, with demand higher for frozen than truck. Most food chains prefer to buy direct from the supplier rather than going through a distributor, largely based on better prices. Restaurants in the territory tend to deal more with fish distributors/wholesalers. The only trends and increase in consumption patterns that can be identified are based strictly on price. as supply is plentiful in Spring and Fall, prices are lower and consumption increases during these times. Australia, New Zealand and South America also supply the market, largely in the form of frozen lobster tails.

DISTRIBUTION SYSTEMS

It appears that direct sales and fish brokers in Maine or Boston are common buying channels for the market. Much depends on size of shipment versus freight charges incurred. All lobster products are regulated by the FDA. Although inspections do occur, local indication is that there has been very little sampling or stoppage by the FDA.

TARIFFS/NTB'S

Live and frozen lobster enter duty free, while value-added prepared lobster meat or surimi seafood carries a duty rate of approximately 7% (Canada) and 10% for most favoured nation. There is also a reduced Merchandise Processing Fee (MPF) on Canadian products.

PROMOTIONAL ACTIVITIES

The Consulate General in Buffalo will not be hosting its annual Canadian Solo Food Show, and other than wholesale shows, there are no promotional activities planned. The largest deterrent to selling lobster in this territory is price, possibly more advertising and new menu choices would encourage the consumer to purchase Canadian lobster and value-added products.

IMPORTERS/USERS

Southtowns Seafood
65 Mid County Drive
Orchard Park, New York 14127
Contact: Dave Norton
Tel:(716) 662-4413

Tops Markets
60 Dingens Street
Buffalo, New York 14206
Contact: Jim Lane
Tel:(716) 823-3712

Wegmans
1500 Brooks Avenue
Rochester, New York 14692
Contact: Jim Kilman
Tel:(716) 328-2550

For Further Information Contact:
Canadian Consulate General
Officer: Marcia Grove
One Marine Midland Center, #3150
Buffalo, New York 14203-2884
Tel:(716) 852-1247
Fax:(716) 852-4340

CHICAGO

SUPPLY & CONSUMPTION

Chicago, the distribution hub to the Midwest with a population base of seven million, should be viewed as a viable and integral part of marketing, promoting and selling Canadian lobster. O'Hare International, the world's largest airport, can readily facilitate, expedite and ensure freshness of perishable product shipments, not only to Chicago but other parts of the world. Of great importance is the impressive hospitality industry resulting from Chicago as a destination for business travellers (>3 million in 1992). Chicago is host to over 27,000 corporate meetings, trade shows, and conventions, contributing in excess of $2 billion per year to the city's economy. The scope of the hospitality/foodservice industry becomes even more important when leisure travellers (11.6 million in 1992) are included in the overall statistics. Since the demand for lobster is greatest in the hospitality industry (foodservice sales account for more than 70% of all lobster that is consumed), the Chicago market should be seriously considered in the distribution process. Despite the higher demand in foodservice, Chicago has seen a recent trend toward actively promoting lobster at the retail level. Current prices reflect the following: a four ounce lobster tail retails for about US$4.00, lobster tails above eight ounces for about US$20.00 per pound, and whole lobsters approximately US$9.00 per pound.

PROMOTIONAL ACTIVITIES

In addition to offering substantial marketing opportunities, Chicago is positioned well for offering great promotional venues. Two extremely important international food shows take place in Chicago annually. Held back to back in the month of May are the Food Marketing Institute Show (FMI) and the National Restaurant SHOW (NRA), both of which enjoy the status of being the biggest and best in their respected industries.

IMPORTERS/USERS

Chicago Fish House
1250 West Division
Chicago. Illinois 60622
Contact: Jack Mitsakopoulos
Tel:(312) 227-7000
Fax:(312) 227-0451

Morley Sales Company
809 West Madison Street, #507
Chicago, Illinois 60607
Contact: Robert G. Slavik
Tel:(312) 829-1125
Fax:(312) 829-3680

L. Isaacson & Stein Fish Co. Inc.
800 West Fulton Market
Chicago, Illinois 60607
Contact: Milton Block
Tel:(312) 421-2444
Fax:(312) 421-2736

Slade Gorton Company Inc.
735 West Lake Street
Chicago, Illinois 60606
Contact: Norbert J. Thoma
Tel:(312) 782-4222
Fax:(312) 782-4267

Micosa Fine Foods
3250 N. Arlington Heights Road
Suite #201
Arlington Heights, Illinois 60004
Contact: Gerald M. Goldman
Tel:(708) 632-1200

Supreme Lobster & Seafood Co.
220 East North Avenue
Villa Park, Illinois 60181
Contact: Anthony J. Bianco
Tel:(708) 832-6700
Fax:(708) 832-6688

For Further Information Contact:
Canadian Consulate General
Officer: Karen Willhite
Two Prudential Plaza
180 N. Stetson Avenue, Suite 2400
Chicago, Illinois 60601
Tel:(312) 616-1860
Fax:(312) 616-1877

CLEVELAND

SUPPLY & CONSUMPTION

This territory has a population of over 20 million consumers with average food store sales over US$25 billion. Canada exports a wide variety of seafood products totalling over US$11 million (not including exports shipped through Boston). Preferred species include salmon; yellow and white perch; halibut; walleye; tuna; pollock; trout; redfish; smoked and dried fish; shrimp; canned, frozen and fresh lobster; rope grown mussels; and snow crab. Consumption of fresh lobster is seasonal, summer and early fall, Christmas and New Years. Standard wholesale price (as of December 1992) for 1 1/4 lb lobster runs from US$4.99 to $5.25 wholesale. Purchasing decisions are based on competitive pricing, market demand, and reliability of supplier. Consumer eating trends are greatly influenced by the restaurant and foodservice industry, thus, information from national publications such as Seafood News, Restaurant Business, Restaurant Hospitality, Seafood Leader, and Grocery Marketing, can be valuable in assessing overall consumer behaviour and future market trends.

DISTRIBUTION SYSTEMS

Important seafood wholesalers and distributors in Ohio include Abbot Foods, Northern Haserot, Euclid Fish, State Fish, Squeri Foods, Midwest Seafood, Remarks Incorporated, Waterfront Foods, etc. Many buy Canadian products, primarily Canadian salmon, some Atlantic cod, rope grown mussels and shellfish. Seafood processors are encouraged to work with Canadian freight forwarders to create a direct supply pipeline to local markets, which would result in lower costs and fresher product for the local wholesalers. Important chain stores with seafood counter operations include First National Supermarkets, Supervalue, Riser Foods, Wetterau, Super Food Services, Seaway, Big Bear, Cardinal and Kroger. Many distribute to corporate accounts and foodservice operations. These chains buy through local wholesalers or direct sales. Canadian seafood processors are encouraged to call on seafood purchasing directors at the corporate level.

Not all buying and distributing patterns are the same, for example, seafood buying patterns for Kroger are unique. Kroger is a fully integrated (manufacturing, distribution and sales) chain of 1250 food stores and 1000 convenience stores, headquartered in Cincinnati, Ohio. The chain is divided into 11 Kroger marketing areas (KMA) or regional profit centres responsible for independent divisions. Seafood products are purchased at both the KMA and corporate levels. Corporate buys three months in advance, KMA three weeks in advance. Corporate buys for 700 seafood departments, KMA 90 stores. The Kroger frozen food operation is located in Louisville, Kentucky, and fresh fish is shipped to Greensburg, Indiana. Canadian seafood marketing operations are encouraged to call at the corporate level, but for the region in general, seafood products are purchased through Detroit and Boston. In general, seafood products are purchased and distributed to retailers and foodservice accounts, some direct shipments do occur.

Some important quickservice and mid-scale restaurant companies specializing in seafood have their corporate headquarters in the territory. Long John Silver in Lexington, Kentucky, which owns and operates 1448 stores nationwide, reports sales of over US$830 million for 1991. Long John Silver uses pollock and hoki as replacements for the scarcer north Atlantic cod. The company is currently developing a world-wide sourcing network in order to control and contract long-term sources. Metromedia, located in Dayton, Ohio owns and operates Ponderosa Steakhouses which serve steak and lobster tail combinations, reports sales of over US$775 million for 1991. Other major chains with corporate headquarters of franchise operations in the territory include Stoufer Restaurant Company, Arthur Treachers, L N Grill, and Docks.

PROMOTIONAL ACTIVITIES

Local buyers attend the Boston Seafood Show, the Ohio Grocers Show, the Canadian Seafood Show in Cleveland, and some interest exists for seafood buying missions to Canada.

POST COMMENTS

The Consulate General in Cleveland suggests a possible NEBS mission of Canadian seafood exporters to compliment the Canadian Seafood Show, or support for exporters through in-store Canadian seafood promotions where large chains (ie. Kroger, Riser and First National) have the most outlets. Wholesalers have shown an increased interest in Canadian seafood products. As in all regions, high quality, competitive prices and reliable shipments are all priority considerations, which according to post contacts in industry, is the most difficult challenge facing wholesalers, distributors and foodservice operations. Post suggests creating a marketing packet for distribution in the territory. The packet should include brochures and information from Canadian fisheries describing lobster products, sourcing, quality standards, handling, storage and preparation information for retail accounts.

IMPORTERS/USERS

Euclid Fish
651 East 185th Street
Cleveland, Ohio 44119
Tel:(216) 531-6448

Mid-West Seafood
P.O. Box 427
Springboro, Ohio 45066

Waterfront Seafoods
5299 Crayton Avenue
Cleveland, Ohio 44104
Tel:(216) 881-4111

Kroger Company
1014 Vine Street
Cincinnati, Ohio 45201
Tel:(513) 762-4000

Northern Haserot Company
2000 West 14th Street
Cleveland, Ohio
Tel:(216) 339-0600

For Further Information Contact:
Canadian Consulate General
Officer: Betsy Holm
Illuminating Building, Suite 1008
55 Public Square
Cleveland, Ohio 44113-1983
Tel:(216) 771-0150
Fax:(216) 771-1688

Metro-Media Steak Inc.
Dayton International Airport Drive
Vandalia, Ohio 43377
Tel:(513) 454-2400

State Fish
1600 Merwin
Cleveland, Ohio 44113
Tel:(216) 696-0080

DALLAS

SUPPLY AND CONSUMPTION

Texas is considered a wealthy state with a population of 17 million, approximately one-half of all Texans are distributed into the following four major metropolitan areas: Houston (3.2 million), Dallas (2.5 million), San Antonio (1.3 million), and Fort Worth (1.2 million). In addition to these four large metropolitan areas, the population of the state is further dispersed into other cities such as: Austin (700,000), El Paso (500,000), Beaumont (400,000), Corpus Christi (350,000), and Brownsville (250,000). Texas, as an urban affluent society, has the profile necessary for an increase in per capita seafood consumption. It has been estimated that one-half of the retail food business in Texas is split amongst five supermarket chains: H.E. Butt (HEB), Kroger, Randalls, Winn Dixie and Albertsons. As well, there are a number of other smaller grocery chains that have significant volumes of retail food sales. These smaller chains do not necessarily have stores located throughout the state, but are usually located in certain specific regions of the state. Some of these smaller chains are: Fiesta, Minyard Food Stores, Rice Markets, and Brookshire. All of the above mentioned supermarket chains carry a wide array of seafood (fresh, frozen and canned).

Louisiana has a population of approximately 4.7 million, composed of the major cities New Orleans, Baton Rouge, Lafayette, Shreveport, Monroe and Alexandria. Louisiana produces over 90% of the crawfish ("little lobster") in the United States, and represents a US$50 million a year industry for Louisiana producers, fishermen and aquaculture industry. Nearly three million pounds of crawfish are sold annually to Sweden, Belgium, France and Japan. Thirty percent of crawfish production is sold out of state, and 70% is consumed within Louisiana.

DISTRIBUTION SYSTEMS

Most seafood entering Texas is imported from Louisiana, California and Massachusetts (mainly Boston). Some Canadian seafood enters Texas via Los Angeles and Boston, but as undifferentiated products, and its Canadian identity is no longer evident at the consumer level. At the wholesale level, the following distributors are felt to have the largest shares of the Texas market: HEB, Sysco, Ben E. Keith, Club Marketing Services, White Swan Food Service Distributors, American Food service, Landlock Seafood Company, seafood Supply, Southland Distribution Incorporated, and Scrivner. For lobster exporters wanting to export to this post territory, it is highly recommended that producers and manufacturers find a broker, and/or distributor, and/or a wholesaler.

POST COMMENTS

In July 1991, the Consulate General in Dallas organized a highly successful U.S. buyers mission to Canada. The Posts' introduction of an American company to a Canadian lobster supplier resulted in sales in excess of a few hundred thousand dollars for the first order. Although the Canadian lobster industry is not yet strong in this territory, there definitely is a potential market for Canadian lobster throughout the Post territory. The Louisiana Seafood Promotion & Marketing Board has confirmed that there is potential in Louisiana. The time looks opportune for the gradual penetration of Canadian lobster products. The Consulate General in Dallas is actively pursuing marketing opportunities and activities which could help the Canadian lobster industry. There is definite market potential in the territory for lobster products, and the Post is willing to help any Canadian company who wishes to export to the market. The prerequisites are the following: 1) a Canadian identity must be created, 2) a steady supply must be made available in order to build consistent demand.

IMPORTERS/USERS

Albertsons Inc.
7580 Oak Grove Road
Fort Worth, Texas
Contact: Tom Scheer
Tel:(817) 568-3900

H.E. Butt Grocery Company
4710 N. Pan Am Expressway
San Antonio, Texas 78218
Contact: Jeff Franzblau
Tel:(512) 662-5415

Minyard Food Stores
777 Freeport Parkway
Coppell, Texas 75019
Contact: Arlie Morrison
Tel:(214) 393-8700

The Cullom Companies Inc.
14303 Inwood Road
Dallas, Texas 75244
Contact: Craig McNight
Tel:(214) 661-9700

Club Marketing Services
102 East Freeman
Duncanville, Texas 75116
Contact: Dalton Lott
Tel:(214) 296-6630

White Swan FoodService Dist. Inc.
P.O. Box 2804
Lubbock, Texas 79408
Contact: Bob Cogswell
Tel:(806) 747-5204

Ben E. Keith Foods
1805 Record Crossing
Dallas, Texas 75235
Contact: Howard Hallan
Tel:(214) 388-5411

For Further Information Contact:
Canadian Consulate General
Officer: Joanne M. Legault
St. Paul Place, Suite 1700
750 N. St. Paul Street
Dallas, Texas 75201-3281
Tel:(214) 922-9806
Fax:(214) 922-9815

Brookshire Brothers Inc.
1201 Ellen Trout Drive
Lufkin, Texas 75901
Contact: Ms. Darla Hood
Tel:(409) 634-8155

The Kroger Company
1901 Gateway
Irving, Texas 75038
Contact: Dreick Penick
Tel:(214) 580-3000

Randall's Food Markets Inc.
3663 Briarpark
Houston, Texas 77042
Contact: Steve Fraley
Tel:(713) 268-3674

Winn-Dixie Texas Inc.
5500 South Freeway
Fort Worth, Texas 76115
Contact: J.E. Vaughn
Tel:(817) 921-1100

Landlock Seafood Company
1815 Trinity Valley Drive
Carrollton, Texas 75006
Contact: Ms. Janet Shelton
Tel:(214) 241-7500

American Foodservice
4721 Simonton Road
Dallas, Texas 75244
Contact: John Bell
Tel:(214) 233-5750

Flying Lobster Limited
627 Peddie
Houston, Texas 77008
Contact: Wally Kopfler
Tel:(713) 868-7555

Fiesta Mart Inc.
P.O. Box 7481, 5235 Katy Freeway
Houston, Texas 77248-7481
Contact: Mohammad Jeddy
Tel:(713) 869-5060

The Kroger Company
16770 Imperial Valley Drive
Houston, Texas 77060
Contact: Bob Zinzke
Tel:(713) 820-7500

Rice Food Markets
5333 Gulfton
Houston, Texas 77081
Contact: Scott Silverman
Tel:(713) 662-7700

American Airlines
4255 Amon Carter, MD4280 C. Port IV
Fort Worth, Texas 76155
Contact: Tom Badyna
Tel:(817) 963-2687

Texas International Food Brokers
P.O. Box 2010
Euless, Texas 76039
Contact: Mrs. Bernice Hoyt
Tel:(817) 540-2455

Affiliated Foods Inc.
P.O. Box 1000
Keller, Texas 76248
Contact: Gene Sharp
Tel:(817) 431-4417

Fleming Companies Inc.
6301 Waterford Boulevard
Oklahoma City, Oklahoma 73126
Contact: John Moll
Tel:(405) 840-7200

DETROIT

IMPORTERS/USERS

Northwest Food Company Inc.
12301 Conant
Detroit, Michigan 48212
Contact: Irv Groskind
Tel:(313) 368-2500

Stand Fish Distributors
1011 East Ferry
Detroit, Michigan 48211
Contact: Bert Halpern
Tel:(313) 871-1115

City Smoked Fish
14440 Wildemere
Detroit, Michigan 48238
Tel:(313) 883-3668

Hamilton Fish Company Inc.
1901 Brewster
Detroit, Michigan 48207
Tel:(313) 832-6100

For Further Information Contact:
Canadian Consulate General
Officer: Ron Biddle
600 Renaissance Center, Suite 1100
Detroit, Michigan 48243-1798
Tel:(313) 567-2340
Fax:(313) 567-2164

Salasnek Fisheries Inc.
2140 Wilkins Street
Detroit, Michigan 48207
Contact: Roy Phillips
Tel:(313) 567-2000
Fax:(313) 567-1517

United Fish Distributors
1349 Adelaide
Detroit, Michigan 48207
Contact: Louis Davis
Tel:(313) 567-6533

Donian Fish Company Inc.
3116 Corunna Road, P.O. Box 304
Flint, Michigan 48501
Contact: Mike Donlan
Tel:(313) 232-7184

Lamberts Poultry & Fish
689 Michigan Avenue
Holland, Michigan 49423
Tel:(616) 396-1431

Superior Seafoods
P.O. Box 350
4243 Broadmoor Street East
Grand Rapids, Michigan 49508
Contact: Paul Osterhaven
Tel:(616) 698-7700

Stapleton's
237 S. Hemlock Road
Hemlock, Michigan 48626
Contact: Nelson T. Stapleton

Great Lakes Fish & Seafood Co.
126 West 7 Mile Road
Detroit, Michigan 48203
Tel:(313) 368-6050

Maxwell Foods
1921 East Ferry Street
Detroit, Michigan 48211
Tel:(313) 923-9000

LOS ANGELES

SUPPLY & CONSUMPTION

The demand for lobster has fallen slightly, mainly because of a weakened economy. The market prices have also dropped as a result of the fallen demand. However, because of lower pricing, the demand for frozen tails has been increasing. The market is highly competitive with Australia being the leading supplier.

The demand for live lobster in the Los Angeles market is not as strong as demand on the eastern seaboard. Demand is mostly from exclusive white-tablecloth restaurants that have holding tanks and feature live seafood products. Most of the leading specialty retail grocery chains have holding tanks and feature seasonal specials on lobster. Only half a dozen brokers and distributors in this post territory have the capability to handle live product.

POST COMMENTS

Markets exist for IQF tails in sizes 5-6 ounce and 6-8 ounce. The hospitality trade has been the primary user. With the falling prices of Australian tails, demand by retailers is increasing.

IMPORTERS/USERS

American Fish Company
530 Ceres Avenue
Los Angeles, California 90013-1717
Contact: Jim Lanter
Tel:(213) 612-0350
Fax:(213) 489-3891

Meridian Products Inc.
P.O. Box 2843
Santa Fe Springs, California 90670
Contact: Richard V. Martin
Tel:(213) 945-9700
Fax:(213) 945-3142

Star Fisheries
2206 Signal Place
San Pedro, California 90731
Contact: Anthony DiMaggio
Tel:(310) 832-8395

For Further Information Contact:
Canadian Consulate General
Officer: Carl Light
300 South Grand Avenue, 10th Floor
California Plaza
Los Angeles, California 90071
Tel:(213) 687-7432
Fax:(213) 620-8827

Amende & Schultz
P.O. Box 788
South Pasadena, California 91030
Tel:(213) 682-3806
Fax:(818) 799-7572

R.M. Sloan Company
732 W. 9th Street, Suite 101
San Pedro, California 90731
Contact: Doug Harbison
Tel:(310) 775-7555
Fax:(310) 831-4450

Star Fisheries
2465 South Industrial Park
Suite #7
Tempe, Arizona 85282
Contact: Wayne Gruninger
Tel:(602) 921-0800

J.J. Camillo Seafood Brokerage
545 Harbor Lane
San Diego, California 92101
Contact: Maurice Camillo
Tel:(619) 238-1963
Fax:(619) 238-0659

Seawin
617 Stanford
Los Angeles, California 90021
Contact: Tony Poon, Nan Tran
Tel:(213) 688-2899

State Fish Company Inc.
2194 Signal Place
San Pedro, California 90731
Contact: Sam DeLuca
Tel:(310) 832-2633
Fax:(310) 831-2402

MINNEAPOLIS

SUPPLY & CONSUMPTION

The Upper Midwest U.S. territory covered by the Consulate General-Minneapolis is traditionally not noted for high consumption of shellfish. Nevertheless, the major cities in the territory, (Minneapolis/St.Paul; Omaha; Des Moines) have populations with disposable income levels above the national norm and are now served by excellent air transportation systems. Although mainly perceived as a "luxury" item, potential exists to promote lobster to a large audience of consumers for whom the product formerly seemed unaffordable. This would be particularly true if the exchange rate remains favourable and supplies are plentiful. Currently the region accounts for approximately 6% of lobster consumption in the United States, but carefully executed promotional programmes have potential to cause a significant rise in this figure.

At present there is no special identity in the marketplace for Canadian lobsters. Most lobster products are shipped through Boston distributors and are perceived generically as "Maine lobsters". Preferred product forms are live (1-1 1/2 lb), whole cooked chilled, cold water tails (5-8oz), vacuum packed meat, "popsicle pack" frozen, frozen cooked meat in 12oz, and 2lb tins. Many of the upscale restaurants and grocery chains in the region maintain live tanks, despite the technical difficulties and manpower requirements of doing so, and remain committed to them. Preferred means of shipment of live product is tail down "egg crate" style. However, one major chain, Cub Foods, is eliminating live tanks in many stores because of difficulties for upkeep and initial threats of picketing from animal rightists, who fortunately have not yet become active in this market. "Popsicle pack" is becoming less and less common, as are 12oz tins, although they are seen on retail shelves from time to time (theft does not seem to be as much as an issue as in other parts of the U.S., although retailers would prefer vacuum packed). Major competing products are other shellfish (particularly frozen shrimp and crab) and surimi products.

DISTRIBUTION SYSTEMS

Most grocery retailers in the territory purchase fresh product from Boston suppliers or from a local wholesaler that purchases from Boston. Although there has been interest expressed in developing direct connections with Canadian suppliers, transportation and border formalities are seen as problems for both retailers and wholesalers. Also important is consistency of supply and price. The post is unaware of any direct imports at the present time, although one chain has had contact with Clearwater. Import problems would be the same as for other parts of the U.S., namely listeria and carapace size.

PROMOTIONAL ACTIVITIES

Trade fair opportunities are limited in this market, with major buyers attending the Boston Seafood Show annually. The best show in Minneapolis is directed at the foodservice trade, the Upper Midwest Hospitality Show, held annually in February, which attracts 25,000 attendees. On a more intimate level, excellent exposure to the top buyers can be obtained at the Canadian Solo Food and Beverage Show, held annually in Minneapolis in February and attended by 400. The Post would encourage trade missions, both incoming and outgoing.

POST COMMENTS

During periods when supplies are plentiful, excellent sales volumes could be obtained in the Minneapolis market through a one-week promotion with one or more chains involving a minimum amount of advertising (newspaper or radio) and in-store activities (demos, P.O.P. materials, displays).

This would probably be most successful using cooked fresh whole product, frozen tails and cooked canned meat, and could be successfully carried out virtually any season of the year. Similar promotions of frozen shrimp and fresh farmed salmon have resulted in one-week sales of 60,000-80,000 pounds in the Minneapolis market, although the existence of a wide variety of independent chains would allow significant choice in the size of promotion desired. A "Canadian" identity would be highly acceptable in this market, particularly if Canadian (not Provincial) promotional materials were developed.

Foodservice accounts could easily be reached through a demonstration of Canadian lobster products (and their merits) recipes, etc. to the local chef's associations. These associations have been happy to work with the Post in the past and are generally pleased with Canadian products.

IMPORTERS/USERS

Absolutely Fresh Seafood Company
1727 Leavenworth Street
Omaha, Nebraska 68102
Contact: Gary Lindberg
Tel:(402) 345-5057

American Fish & Seafood Company
5501 Opportunity Court
Minnetonka, Minnesota 55343
Contact: Mr. L.P. Bialick
Tel:(612) 935-3474

Coastal Seafoods
2330 Minnehaha Avenue
Minneapolis, Minnesota 55404
Contact: Tim Lauer
Tel:(612) 724-5911

Morey Fish Company
742 Decatur Avenue North
Golden Valley, Minnesota 55427
Contact: William Frank
Tel:(612) 541-7400

Byerly Foods
7171 France Avenue South
Minneapolis, Minnesota 55435
Contact: Mr. Dale Riley
Tel:(612) 831-3601

Cub Stores Inc.
127 Water Street
Stillwater, Minneapolis 55082
Contact: Ms. Jane Springer
Tel:(612) 439-7200

Lund's Inc.
1450 West Lake Street
Minneapolis, Minnesota 55408
Contact: Larry Long
Tel:(612) 825-4433

Rainbow Foods
1515 Excelsior Avenue East
Hopkins, Minnesota 55343
Contact: Tom Scheirer
Tel:(612) 931-1100

Baker's Supermarkets
8420 West Dodge Road
Omaha, Nebraska 68114
Contact: Joe Bickley
Tel:(402) 397-4321

Dahl's Food Marts
4343 Merle Hay Road
Des Moines, Iowa 50310
Contact: Mark Nissen
Tel:(515) 278-1657

Hy Vee Foodstores Inc.
1801 Osceola Avenue
Chariton, Iowa 50049
Contact: Denny Luxavsky
Tel:(515) 774-2121

For Further Information Contact:
Canadian Consulate General
Officer: Margaret Mearns
Suite 900, 701 Fourth Avenue S.
Minneapolis, Minnesota 55415-1899
Tel:(612) 333-4641
Fax:(612) 332-4061

NEW YORK

SUPPLY & CONSUMPTION

The Canadian Consulate General in New York City has provided statistics which indicate that 343,000 pounds of live lobster were shipped to the Fulton Fish Market (New York City's primary distribution center for fresh seafood products) during 1992, up from 326,800 pounds in 1991. All live lobsters arrived by truck, with supplies arriving from Maine (147,600 pounds); New York (131,900); Nova Scotia (33,000 pounds); Massachusetts (11,900 pounds); Connecticut (11,000 pounds); Rhode Island (6,800 pounds); Maryland (500 pounds); and, New Jersey (300 pounds). Prices for lobster fluctuated during the year, but as of December 1992, live lobsters from Nova Scotia were priced: 2 pound (US$6.35); 1-1/2 (US$5.40); 1-1/4 (US$4.92); CHIX (US$4.70); and, Culls:Med/Small (US$3.77).

PROMOTIONAL ACTIVITIES

The Canadian Consulate General in New York is scheduled to participate in the National Prepared Frozen Food Festival, September 22, 1993, and this is a show for the foodservice industry. In the past, Fishery Products International and National Sea Products have been exhibitors, and the Post feels that it would be a good show for firms producing frozen lobster meat.

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SAN FRANCISCO

SUPPLY & CONSUMPTION

Lobster is a price sensitive commodity in the San Francisco market. To promote sales, Canadian exporters need to come into the market at a better price. The lobster market is a comparatively small market, spot direct, sold direct. With this type of high ticket item, what affects sales is the same all across the U.S., with socio-economic factors dictating which area will sell more. The San Francisco Bay area's affluent eight million residents and additional eight million yearly tourists, is one of the leading U.S. market areas. As an elastic high priced commodity, at a certain price, consumers will not buy. When whole cooked or tails are too high, as at present (US$15-$30), there will be a slight decline in the U.S. market. The leading importer/wholesaler has indicated that the market has been constant with more competition. When a supermarket chain has a promotion, they sell at cost; when lobsters are on a restaurant menu, because they are so expensive, it also usually sells at market price. When prices go too high, crab is usually substituted.

Canadian lobster tails are in competition with Australian (cold water). Historically, customers know the Australian tails (same latitude as Canada, and same product). For the past 20-25 years, the Australian product has been readily available and "in the pipeline" as the established product, and on menus as the recognized product. However, the price is now so high, most restaurants have taken it off the menu and have turned to the warm water variety. Canadian lobster tails are usually 4-7 ounces, with a preference for 8-10 ounces or 10-12 ounces. Lately, Canada has had a price advantage. A 5-8 ounce tail is available today, delivered at US$15.32. The North Australian tails, similar to Caribbean warm water tails are prices at US$13.50.

DISTRIBUTION SYSTEMS

Live lobsters are purchased out of Boston, or direct. The wholesaler adds at least 20% to the cost, and if purchased direct, approximately 10% is added to the price for administration costs.

PROMOTIONAL ACTIVITIES

The leading local wholesaler for live lobsters (Fisherman's Wharf), sees supermarket (Safeway) promotional opportunities (assuming quality and availability) at any time to be based on price and availability, with US$5.99 per pound as the magic sales number. In conjunction with one or two other distributors, they could move 35,000-45,000 1 to 1 1/4 pound lobsters with a four to six week lead time (US$.75 more for 1 3/4 to 3 pound sizes).

POST COMMENTS

If Canadian suppliers want to promote their products in an attempt to increase a foothold in the local market, they must supply the product at a better market price than the competition.

IMPORTERS/USERS

Dodwell
435 Fourth Street
Oakland, California
Tel:(510) 465-0836

Fisherman's Wharf Seafoods
San Francisco, California
Tel:(415) 330-1700
Fax:(415) 822-9078

Joe Pucci & Sons
678 Third Street
Oakland, California
Tel:(510) 444-3769
Fax:(510) 444-3973

Just Lobster
24 South Spruce Street
S. San Fransisco, California
Tel:(415) 737-9111

Sea Hawk
1334 Dell Avenue
Campbell, California
Tel:(408) 378-9944

Lusamerica
1325 East Julian Street
San Jose, California
Tel:(408) 294-6622

For Further Information Contact:
Canadian Consulate General
Officer: Carl Light
300 South Grand Avenue, 10th Floor
California Plaza
Los Angeles, California 90071
Tel:(213) 687-7432
Fax:(213) 620-8827

New England Lobster Company
1530 Gilbreth Road
Burlingame, California
Tel:(415) 692-5587

SEATTLE

SUPPLY & CONSUMPTION

Lobster consumption in the Pacific Northwest continues to be predominantly in the foodservice sector, although some high-end specialty retail grocery stores are making excellent progress. For example, Larry's Markets ran a lobster promotion in the fall of 1992 (August-September). The 20-24 ounce live product was purchased directly from Boston. At an advertised price of US$5.99 per pound, volume for the promotion was estimated to be in excess of 30,000 pounds for their three top stores. Normal prices for live lobster range from US$9.99 per pound for under two pounds, to US$13.99 for lobster in excess of two pounds. Present live "Maine" product is coming from operations that manipulate moulting for consistent supply. This is the first promotion of its kind in the Pacific Northwest, and the Post anticipates that if supply and prices are comparable next year, the promotion will be repeated.

Presently, live product primarily originates from Maine, although buyers are interested in considering alternate sources. Primary competition to the live product are frozen tails from Australia, the Caribbean, Mexico, Hawaii and Hong Kong. Frozen West Australian tails are retailing in the US$35-$40 per pound category. Sizes run from one-third of a pound to six pounds. Although direct competition originates from silver tails, rock lobster, langostino and scampi, indirectly, Alaskan and local crab is also perceived as a replacement for "centre of the plate" entrées.

PROMOTIONAL ACTIVITIES

The following retail and institutional trade shows are relevant to the promotion of lobster in the Pacific Northwest: 1) Washington State Food Dealers Convention and Trade Show, held October 11-13, 1993; 2) Oregon Food Dealers Association Convention and Trade Show, held October 21-24, 1993; and 3) Pacific Northwest Restaurant Show, held April 17-19, 1993 in Portland, and March 1994 in Seattle.

POST COMMENTS

In addition to the obvious advantages in currency exchange and proximity to the market over offshore products, Canada is seen as having clean and pristine undertone and Canadian products are perceived as being high in quality. Canadian suppliers are encouraged to capitalize on the Federal assistance programs available to them. The Seattle office has been coordinating Canadian Food Shows and Canadian Pavilions in regional trade shows since 1976. These shows provide an excellent and unparalleled opportunity to network with the local food community.

IMPORTERS/USERS

Mutual Fish Company
2335 Rainier South
Seattle, Washington 98144
Tel:(206) 322-4368

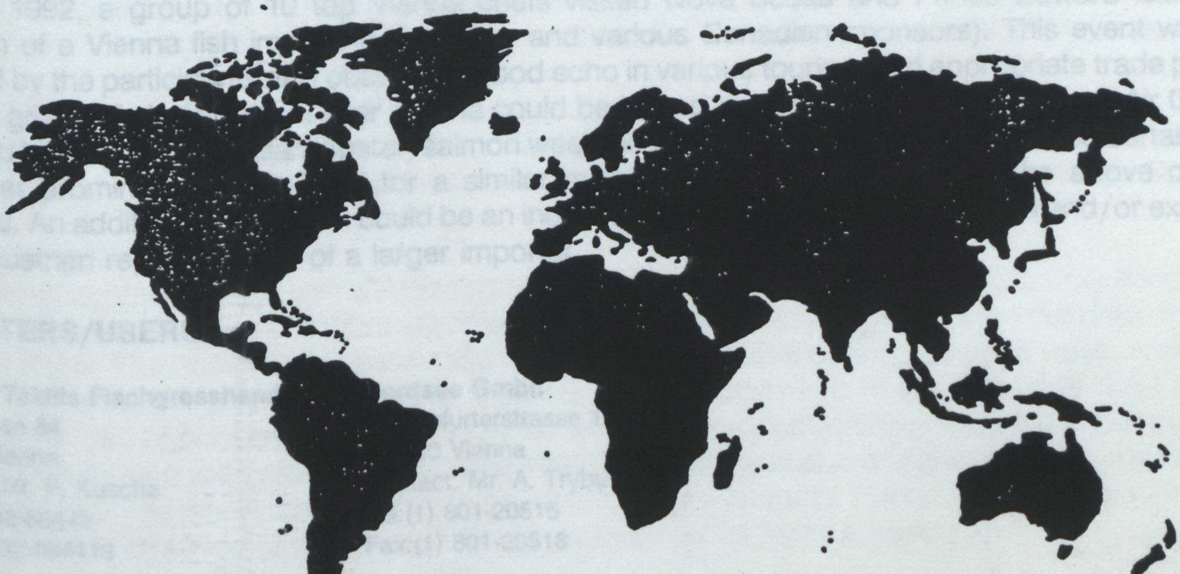
Osprey N.W. Seafoods
R.R. #2, Box 3078
Lopez, Washington 98261
Tel:(206) 468-2052

Pacific Fish Company
814-6th Avenue South
Seattle, Washington 98134
Tel:(206) 623-1011

For Further Information Contact:
Canadian Consulate General
Officer: Doug McCracken
412 Plaza 600, 6th & Stewart Streets
Seattle, Washington 98101-1286
Tel:(206) 443-1777
Fax:(206) 443-1782

Portland Fish Wholesale Company
310 N.W. Davis Street
Portland, Oregon 97209
Tel:(503) 299-6780

EUROPE/SCANDINAVIA



AUSTRIA

SUPPLY & CONSUMPTION

Austria's total imports of crustaceans of all kinds in 1991 were 2200 metric tons valued at Cdn$21,100,000, C.I.F. Austrian border. The Canadian share of imports was 46 metric tonnes valued at Cdn$708,000 (calculated at current exchange rate). Lobster imports for 1991 are broken down as follows: H.S.0306.11 (2800 kilos); 0306.12 (18,400 kilos); 0306.21 (900 kilos); 0306.22.9 (50,700 kilos); and 1605.3 (4100 kilos). The major suppliers were the EC and EFTA countries, as well as Canada. Deliveries are spread throughout the year, although the demand increases during the Christmas season, and is very low in July and August when most Austrians are on annual vacation. There are more and more top restaurants offering lobster on their menus, however, at very high prices to the final consumer. Most of the marketed lobsters are used by the larger hotels and specialty fish restaurants.

DISTRIBUTION SYSTEMS

Importers and wholesalers distribute lobster direct to retail traders, hotels, restaurants etc.

TARIFFS/NTB'S

The Austrian customs tariff provides for an ad valorem duty of 20% for all H.S. lobster imports from Canada mentioned above in Supply & Consumption. In addition to customs, an import turnover tax (V.A.T.) of 10% is levied on the duty paid price.

PROMOTIONAL ACTIVITIES

In June 1992, a group of 10 top Vienna chefs visited Nova Scotia and Prince Edward Island (on invitation of a Vienna fish importing company and various Canadian sponsors). This event was well received by the participants and obtained a good echo in various tourism and appropriate trade papers. Another group of chefs from all over Austria could be invited to a similar event. In addition, Air Canada arranged in the past, Canadian lobster/salmon weeks in the Vienna Hilton. The Post could certainly use any other prominent Vienna hotel for a similar event, especially where one of the above chefs is engaged. An additional promotion could be an incoming tour of Canadian processors and/or exporters for an Austrian representative of a larger importer.

IMPORTERS/USERS

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A-1200 Vienna
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Nordsee Gmbh
Breitenfurterstrasse 164
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For Further Information Contact:
Canadian Embassy
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BELGIUM

SUPPLY & CONSUMPTION

Some 500 metric tonnes of lobster entered Belgium in 1991, 80% live and 20% frozen. Canadian marketshare was around 70%, the United States 20%, and EEC countries, mainly Scotland and France, comprised the remaining 10%. Acceptable weights vary between 300 grams and 1000 grams, with 500-600 grams the most desirable weights. As of December 1992, import prices for lobster were as follows: lobsters up to 600 grams (Cdn$4.70 per pound); 600 grams and up (Cdn$5.00 per pound). Imports are coming into Belgium from the Netherlands, and the Post suspects that Canadian and American lobsters are being trans-shipped from Holland to the local market.

Up to December 1991, there was a growing trend in lobster imports, but since then there has been a decrease of 20% in imports, mainly due to the economic slowdown. On the other hand, importers complain that the extreme price fluctuations policy practised by Canadian exporters has had a negative impact on their sales to restaurants and hotels, their most important customers. Demand for lobster meat and prepared dishes with lobster meat, while still minimal, is expected to increase in the coming years. Import statistics for 1991 are as follows: H.S.0306.11 (36,200 kilos valued at F$31,554,000); 0306.12.1 (397,900 kilos valued at F$134,101,000); 0306.12.9 (23,300 kilos valued at F$9,793,000); 0306.22.1 (1,602,500 kilos valued at F$687,124,000); and 1605.3 (16,100 kilos valued at F$9,811,000).

DISTRIBUTION SYSTEMS

There exists a well established distribution system for live and frozen lobsters in Belgium. Lobsters come into Belgium through importers who sell directly to hotels, restaurants, wholesalers, supermarkets and fine food retail outlets. Canned lobster is imported by the supermarkets and trading houses.

PHYTOSANITARY REGULATIONS

There are no regulated health standards for lobsters in Belgium. A health certificate must accompany the shipment of live lobsters and a veterinarian inspects each shipment arriving at the Brussels airport.

PROMOTIONAL ACTIVITIES

The Post will be participating with a national stand at the first European Seafood Fair, April 20-22, 1993, which is organized by Diversified Expositions, the same group which organizes the International Boston Seafood Show. The Post will also have a Canada Week in Brussels during the same week, April 20-27. During that week, the Embassy plans to organize a food festival in a highly reputable hotel and this might be another opportunity to promote Canadian lobster products. There is also another possibility of organizing a Canadian Lobster Day in June 1993. Providing proper funding is available, the Embassy could launch campaigns in department stores, hotels and restaurants. Adequate promotional materials and resources (personnel and financial) would be required for such a campaign.

POST COMMENTS

There exists a capacity problem for direct flights from Canada to Belgium, especially during the peak season of Christmas and New Years. It is impossible for Belgian importers to book space on Sabena flights are full for this period. Furthermore, it is possible that in the near future (six months) Sabena will no longer fly from Montreal to Brussels. Of course, lobsters can be shipped by Air Canada to Paris, London or Frankfurt, but this will increase costs, and connections to Belgium are not always easy. Belgian importers may have to switch to American suppliers who can ship direct from Boston. This situation could reduce Canadian exporters share of the Belgian market in the near future.

IMPORTERS/USERS

De Bacquer N.V.
Industrielaan 5
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Fax:(02) 582-0824

Pieters Visbedrijf N.V.
Kolvestraat 4
Industrieterrein Blauwe Toren
8000 Brugge
Contact: Leo Verheye

De Jager N.V.
Kloosterstraat 134-142
2000 Antwerpen
Contact: Mr. De Jager
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Fax:(03) 237-9953

For Further Information Contact:
Canadian Embassy
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1040 Brussels, Kingdom of Belgium
Tel:(011-32-2) 735-6040
Fax:(011-32-2) 735-3383

Lobster Fish
Quai Au Bois A Bruler 19
1000 Brussels
Contact: Mr. Blomart
Tel:(02) 218-3603
Fax:(02) 217-8804

DENMARK

SUPPLY & CONSUMPTION

Denmark has been a relatively good market for lobster, both local Scottish fresh lobster in season, Canadian live, and frozen in brine. Lobster is only consumed boiled and halved served cold, and almost never as part of a recipe. For gourmet occasions, locally caught and fresh scottish lobster command far higher prices. The Denmark consumer market is suffering both from the world recession and high domestic unemployment, resulting in all products being sold on price competitive factor. The only fish products which have increasing markets are relatively inexpensive products, such as surimi and squid. Consequently, many hotels and restaurants are going out of business causing difficult conditions for the lobster importers, two of whom are likewise out of business. Danish importers have otherwise been importing live lobsters sourced in Canada (three times weekly via Boston), which has both better holding facilities and air routes which reduce the mortality rate on route. Due to the recession, importers currently have large stocks of frozen in brine. These are however, also marketed retail with the most popular season being the month of December. Live lobsters are sold by the frozen fish specialty shops and to the hotel and restaurant trade. Import statistics for 1991 are as follows: H.S.0306.12.1 (125.1 tons valued at DKr$6,929,000); and 0306.22.1 (58.2 tons valued at DKr$4,864,000). The Post reports that a portion of imports indicated as originating in the United States, is actually sourced from Canada.

PHYTOSANITARY REGULATIONS

Live lobsters are kept in tanks for up to one week upon entering Denmark.

TARIFFS/NTB'S

Live lobster enters under H.S.0306.22.1 at 8% duty, while whole, frozen in brine enters under 0306.12.1 at 16% duty. However, Danish importers advise that in fact, all lobster enters at 8%, and an additional 8% would badly disrupt the market based solely on pricing factors.

PROMOTIONAL ACTIVITIES

The Post doubts that promotional activities would have any influence and believes that the situation will worsen in 1993. The Post has proposed a fish, food and wine promotional activity for Danish catering sector for September 1993. This project has not yet been approved, nor would it be appropriate to implement at that time if the recession in the hotel and restaurant sector worsens as anticipated.

POST COMMENTS

Canadian lobster exporters should be aware of the difficult financial conditions in the Danish fish industry, and only ship to new companies against secured payments.

IMPORTERS/USERS

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DK-1561 Copenhagen V
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Fax:(45-33) 15-67-65

Kongsbak Lassen A/S
Kalvebodpladsvej 26
DK-2300 Copenhagen S
Contact: Jacob Kongsbak Lassen
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FINLAND

SUPPLY & CONSUMPTION

Finland represents a marginal market for lobster products. Lobsters are not found on the shores of the Baltic Sea and are thus not a traditional delicacy. The peak year for lobster consumption in Finland was at the height of the economic boom in 1989. Total imports then were 42 tons, of which 36 tons was of Canadian origin. Twenty-six tons were frozen popsicle, nine tone canned and six tons fresh. Import statistics for 1991 were as follows: H.S.0306.11 (>1 ton valued at Cdn$1,0000); 0306.12 (11 tons valued at Cdn$143,000); 0306.22 (5 tons valued at Cdn$105,000); and 1605.3 (1 ton valued at Cdn$25,000). The major competing products are domestically caught crayfish which are also imported frozen from the United States, and fresh from Russia. Lobster products are primarily consumed in restaurants.

DISTRIBUTION SYSTEMS

Due to the low consumption and import volumes, lobsters are not imported directly from the source, but from wholesalers in countries where consumption is greater (eg. live lobsters from France, and frozen from Sweden).

PHYTOSANITARY REGULATIONS

There are no special phytosanitary regulations for lobster products entering Finland. Suitability for human consumption is appraised by smell, taste and appearance in sample testing.

TARIFFS/NTB'S

All lobster products enter Finland duty free, except for H.S.1605.3 which have an import duty of 15%. There are no non-tariff barriers, but a sales tax of 22% exists.

PROMOTIONAL ACTIVITIES

The Post recommends that Canadian lobster exporters organize a tasting and sampling presentation by Canadian chefs in a local seafood restaurant for the leading hotel and restaurant chefs and press with recipes which can be used for future reference.

POST COMMENTS

Canadian lobster products have a strong position in the small market, which unfortunately at the moment, is suppressed by the world recession.

IMPORTERS/USERS

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Kokkonen Arvo Ky
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Fax:(011-358-0) 601-060

FRANCE

SUPPLY AND CONSUMPTION

The lobster market is an established, important, growing market in France, and is considered to be a traditional food. Very little lobster is caught off the French coast, and domestic consumption is on the rise which has resulted in larger volumes of imports. There are two separate and quite distinct markets, live lobster and frozen lobster (whole or parts).

The overall market for live lobster (H.S.0306.22.1) in 1991 was 4210 metric tonnes, with 3910 metric tonnes supplied through imports. The live product competes with live crayfish (red and pink), and competing countries are Scotland, Ireland, and the United States. Large, live crustaceans (crayfish, lobster) are fancy foods eaten mainly during the Christmas and New Year's holidays, often in very elaborate recipes. Recession has not adversely affected the consumption of festive food products in recent years. Crayfish have become rare and very expensive, with the wholesale price at approximately Cdn$100 per kilo, which has benefitted lobster. *Homarus americanus*, which comes from the U.S. and Canada, is considered to be of lesser quality than the European lobster, and is sold at a much lower price. The availability of the North American variety and its lower price have resulted in a considerable increase in imports.

Nearly all of the live lobsters from the United States are mistakenly sold under the name "Canadian lobster", which under French law is fraudulent misrepresentation of the product's origin. However, some of these lobsters are actually caught in Canada and then immersed in the coastal waters of Maine. The presence of American companies with facilities in Canada favours this system. In addition, many Canadian lobsters are shipped through Boston because of the availability of air freight, which for French customs purposes gives them a U.S. origin. Despite these problems, the Embassy feels that live Canadian lobster has undergone very solid growth in volume in recent years, since imports from Canada have risen much more rapidly than total imports, and growth can still take place (at a slower rate) if air freight is available.

Imports of whole Canadian lobster (H.S.0306.12.1), cooked and uncooked, totalled 2540 metric tonnes in 1991. For frozen lobster parts (H.S.0306.12.9), cooked but not prepared, total imports were 387 metric tonnes in 1991. On the whole, the importing of frozen products has increased, albeit irregularly, largely due to variations in the quantities and prices of "popsicle" lobster. A distinction is made between "popsicle" lobster and "popsicle pack lobster" (whole frozen, cooked in brine) and other frozen products. Competing products are: frozen crayfish, jumbo shrimp, and frozen crayfish tails. The most common weights are 200, 225 and 250 grams for wide distribution, and 300 and 400 grams for specialized stores. Between 80-90% of these popsicles are sold in supermarkets, which purchase directly or via importers. The two main periods of consumption are Christmas and Easter. The product is often sold in 10-unit packs, and sold by containers.

Despite promotion and the relatively low price of the product (the supermarkets generally sell it as a loss leader), lobster is little-known and strange-looking to prospective buyers. Many competitive products (Cuban crayfish, jumbo shrimp) are the subject of promotional campaigns, some of which include television. A popsicle lobster of 200 or 250 grams produces about 60 to 70 grams of meat, which can be quite disappointing on the plate. Promotional campaigns for Canadian lobster are focused on supermarkets and on the price, not the quality or the recipes that can be used. As for price, Canada is the pace-setter. In terms of quality, we feel that the consumers should be told about the difference in quality between the various fishing periods, and only spring lobster should be sold in popsicle form.

Imports include whole frozen I.Q.F. lobster, frozen lobster parts (claws, tails), and lobster meat. Competing products include frozen crayfish, and frozen crayfish tails. This product has been available only recently in France. An interesting outlet for the product is provided by restaurants and certain supermarket chains. A problem is that the claws or shell parts can break when the lobsters are not protected while being shipped. They are imported by wholesalers or companies specializing in food for restaurants.

New products on the market include frozen "portion control" or "half-split" half lobster, and fresh cooked lobster (imported live from Canada and cooked by a French company). The most common lobster meat products such as frozen lobster tails and frozen tomalley are still relatively unknown. Outlets could be found for each of these products, however, tests with frozen lobster meat have been rather inconclusive, since the French like to eat lobster in the shell. There is a market for frozen empty lobster shells in France. Top shells are used to make aromatic extracts and medicines, and are often imported by wholesalers. Fish soups and the well-known "lobster bisque soup" are also prepared with the tomalley and top shells. For canned lobster and lobster preparations (H.S.1605.3), imports were 194 metric tonnes in 1991. These products can be presented in very different forms. Imports from Canada are increasing regularly. Canned lobster is very expensive in terms of the volume of the contents, and consumers sometimes find it disappointing.

DISTRIBUTION SYSTEMS

The traditional distribution system uses the following intermediaries: 1) an "importer" which is often a company on the Rungis market; and 2) a "distributor" or "final vendor" which sells the live lobster, either to a final consumer (private individual) or to a restaurant. This system is followed for much of the year, and the distributor can be a traditional fishmonger or a supermarket. During Christmas and New Year's, most of the major supermarkets sell live lobster at loss leader prices, and during this time, they purchase directly in Canada. Some restaurant chains also import directly from abroad. Unbeknown to the average consumer, there are two types of products coexisting on the market: lobster that arrives directly from Canada, and lobster that has been kept in pounds in Brittany, and the latter are often used by restaurants.

PHYTOSANITARY REGULATIONS

The product must be accompanied by the proper sanitary certificate. Models are provided by Fisheries and Oceans Canada: Type I for live and frozen uncooked lobster, Type II for frozen cooked products. The date frozen must be shown on the documents and packaging, and certificates are completed by a Fisheries and Oceans inspector. The product may also be inspected upon arrival by a Ministry of Agriculture veterinarian. If the product is intended for consumer sales, it must be labelled in accordance with a number of specific regulations. If the product is considered to be cooked food, the processing plant must be approved by the French authorities on a proposal by Fisheries and Oceans Canada.

TARIFFS/NTB'S

The customs duties are the same in all EEC countries for Canadian products: whole frozen lobsters (8%); frozen lobster parts (16%); live lobster (8%); whole non-live, non-frozen lobster (8%); non-live, non-frozen lobster parts (20%); and canned lobster and lobster preparations (30%). The duty is calculated on the C.I.F. value, and there are no particular non-tariff customs barriers.

PROMOTIONAL ACTIVITIES

The drawing-card for lobster is the live product, and it should be the focal point of a promotion. Canada has a very good image in France, and is seen as a clear, pure, humanitarian country. Exporters should concentrate on Canada, as opposed to a given province, as the source. For example, lobster could be banded with rubber bands bearing the name "Canada". Packaging should aim at clearing up misunderstandings among consumers. For example: 1) many of the French believe that Canadian lobster is cultivated; and 2) the French think that Canadian lobster is not as good as European lobster.

When Canadian lobster is more widely known, it may be possible to promote live lobster for the May-June period, however, May is not a good month because of the logistical problems created by the many holidays. It has been observed that hot, sunny weather causes a decline in the consumption of seafood, especially during July and August, not to mention the problems involved in shipping lobster. A high-priced product, lobster has a festive image, and this positive festive image should be retained.

As for frozen lobster products, promotion should be done at the restaurant level and developed in cooperation with the restaurants or with catering companies. This is entirely theoretical, because the promotion of live lobster requires a multi-year commitment with a medium-term marketing plan. Short-term operations will not affect the image or consumption of lobster, and would require budgets not subject to constant review.

Booklets on how to cook lobster would have little promotional value, because French know how to cook it and are not afraid to purchase it for home preparation, as France is a country of expert cooks. The use of literature or promotional material in English only is of no value, they must be in French.

POST COMMENTS

In order to facilitate exports of live lobster, air freight between Nova Scotia and France must be improved and freight made more available. In addition, the end of the GATT negotiations could result in a decline in customs duties for the more elaborate products, which would improve their market prospects. In general, new products make a market more dynamic. There is a growing demand for food frozen in individual trays for microwave, uncooked lobster tails, for example. New products such as these must be prepared in cooperation with French companies in order to meet French requirements, be it at the supermarket or restaurant level.

IMPORTERS/USERS

Beganton (S.A. Gaby Beganton)
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Davigel S.A.
Zone Industrielle, B.P. 41
76201 Dieppe
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Galec (Centrale D'Achat Leclerc)
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207, rue des Margats, B.P. 467
62206 Boulogne Sur Mer Cedex
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Gerard et Cie S.A.
Moulin du Domaine
35430 St Jouan des Guerets
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Legrand et Malo S.A.
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76060 Le Havre Cedex
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GERMANY

SUPPLY & CONSUMPTION

Germany is a net importer of lobster. Luxury fish consumption has risen sharply over the past few years, especially in restaurants, as Germans tend to dine out more. Approximately two-thirds of the lobster consumed locally is in restaurants, with one-third consumed in households. Competition exists within the market from shrimp and prawns. Germans favour live lobster, frozen lobster is not as popular, and canned lobster is seldom used, mainly only in salads. Current import statistics are as follows: H.S.0306.11 (118,400 kilos valued at DM$5,487,000); 0306.12.1 (366,900 kilos valued at DM$5,565,000); 0306.12.9 (16,100 kilos valued at DM$491,000); 0306.21 (50,900 kilos valued at DM$1,943,000); 0306.22 (853,900 kilos valued at DM$15,349,000); and 1605.3 (43,700 kilos valued at DM$1,960,000).

DISTRIBUTION SYSTEMS

The major point of entry for live lobster in Germany is the Frankfurt airport. Lobster is distributed mainly through wholesalers, primarily situated in Hamburg. Fishmongers are dominant in the fresh and smoked fish sectors, while supermarkets have been key in expanding the frozen fish market. Department stores focus mainly on the upper end of the market by selling fish preparations and luxury items. There is no central fish market to serve as a pricing and distribution hub, although most German importers can be found in Hamburg and Bremerhaven.

PHYTOSANITARY REGULATIONS

Imports of fish and fish products are not subject to detailed import regulations. Products are not examined for compliance with German food regulations until they cross the border, and are conducted in connection with the general supervision of food being offered for sale on the market. The principal purpose of these inspections is to find out whether the imported products are injurious to health, spoiled, adultered or mislabelled. in connection, bacteriological, parasitological, pathological-anatomical and chemical tests are carried out. Additionally, increasing attention is paid to residues (mainly those of pesticides), toxic metals and substances having a pharmacological effect. The examination also extends to freshness, labelling, and compliance with EC marketing standards.

PROMOTIONAL ACTIVITIES

Appropriate promotional events in Germany which should be considered by Canadian lobster exporters are ANUGA, October 1993, and the Bremen Fish Fair held in June 1994.

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GREECE

SUPPLY & CONSUMPTION

Lobsters are generally considered to be an expensive fisheries product in Greece. Lobster sells at approximately $45 per kilo in the fish markets and for over $75 per kilo in restaurants. A small quantity of lobster is produced locally, but most lobster is imported. According to the National Statistics Bureau of Greece, 17,837 kilos of lobster was imported in 1991 (valued at $258,037), and 23,030 kilos were imported from January-September 1992 (valued at $430,440). The breakdown for 1992 was as follows: H.S.0306.11 (2742 kilos); 0306.12 (18,220 kilos); 0306.22 (1956 kilos); and 1605.3 (112 kilos).

Lobster is generally imported from France, Italy, the United Kingdom, Thailand, Holland, Denmark and the United States. Occasionally, small quantities are imported from Morocco, Mauritania, Ghana, Tanzania, Norway, India, Iceland, Philippines, and even Albania. In the past, some fish importers have tried importing live lobsters from Canada, but the mortality rate was very high and the cost of transportation was not justifiable.

POST COMMENTS

There is market potential for frozen lobster tails of 10-12 ounces, however, only if the price upon arrival in Greece can be under $35 per kilo. The Post has been actively trying to promote Canadian lobster in the Greek market. A special lobster promotional luncheon was hosted by the Canadian Ambassador at his residence on May 30, 1991. The luncheon was supported by two major Canadian companies. The promotion was a success, although no business resulted with either company to date. The 34 guests that attended were selected lobster buyers and decision makers from the trade, hotel chains, supermarket chains, catering companies and cruise ship companies.

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IRELAND

SUPPLY & CONSUMPTION

As a marine nation with a substantial fisheries sector, lobster (*Homanus gammanus*) landings are in the order of 400 tonnes per annum. A high percentage of the catch is exported mainly to the French market. Household consumption of Lobster in Ireland is very modest, as are the level of imports which are normally in the order of 20-25 tonnes per annum. However, a major market constraint is that imports of live lobster are not permitted under the Import of Live Fish Order 1972, except from Northern Ireland. With specific reference to lobster, the authorities advise that they would be concerned with the possibility of introducing Gaffkaemia. However, a forthcoming EEC directive may change the terms of reference in 1993, based on working party considerations etc.

Import statistics for 1991 were as follows: H.S.0306.12.1 (3.3 tonnes valued at £18,4000); 0306.12.9 (8.6 tonnes valued at £41,600); 0306.21 (3.2 tonnes valued at £13,700); 0306.22.91 (0.4 tonnes valued at £3,400); 0306.22.99 (1.7 tonnes valued at £8,500); and 1605.3 (1.3 tonnes valued at £7,100).

DISTRIBUTION SYSTEMS

Distribution is often handled by quayside buying agents who channel live supplies to the French market to retail/fish merchants or to restaurants. In addition, they can negotiate imports from their counterparts in Northern Ireland. Restaurant owners will also buy quayside or from the Dublin fish market.

PHYTOSANITARY REGULATIONS

Imports of frozen lobster require a health certificate.

TARIFFS/NTB'S

The Customs and Excise Tariff of Ireland is based on the EC Common External tariff. The following rates apply to non-EEC products: H.S.0306.12.1 (8%); 0306.12.9 (16%); 0306.21 (25%); 0306.22 (8%); 0306.22.91 (8%); 0306.22.99 (20%); 1605.30.1 (20%, 0% from July-Dec 1992); and 1605.30.9 (20%).

POST COMMENTS

Grading undertaken, especially for Irish exports, is encouraged (ie. 350-600 grams, 600-900 grams, 900 grams +). The trade and the restaurant owners now advise that they consider lobster to be a luxury product, hence the modest level of consumption (and imports). Crab consumption is more buoyant with landings of some 3000 tonnes per annum. Crab meat exports are destined for the French, Swedish and British markets.

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GREECE

SUPPLY & CONSUMPTION

Lobsters are generally considered to be an expensive fisheries produ[illegible] [illegible] is [illegible] [illegible] imported from [illegible] [illegible] [illegible] the United States. Occasionally, [illegible] Tanzania, Norway, India, Iceland, Philippines, and even Albania. In the past, some fish importers have [illegible]

POST COMMENTS

There is market potential for frozen lobster tails of 10-12 ounces, however [illegible] The promotion was a success, although no business resulted with either company to date. The [illegible] guests that attended were selected lobster buyers and decision [illegible] The 34 supermarket chains, catering companies and [illegible]

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ITALY

SUPPLY & CONSUMPTION

Italy's production of all crustaceans in 1991 was officially estimated at 33,635 tonnes, representing a continuing decline as pollution and over-fishing progressively reduce marketable resources. Crustacean imports in 1991 slightly exceeded official domestic output, amounting to around 38,000 tonnes. Major items included the following: frozen Pandalis shrimp (5607 tonnes), other frozen shrimp and prawns (18,943 tonnes), frozen Norway lobsters (4933 tonnes), and frozen freshwater crayfish (2515 tonnes). Total imports of canned crustacean products are practically nil.

Demand for crustaceans is concentrated in the major coastal cities, and is strongest during the summer vacation period when normal domestic requirements are augmented by strong foreign tourist demand. While certain fish products are traditionally marketed through fishmongers and supermarkets for cooking in the home, crustaceans, and especially the larger-sized species, are consumed almost exclusively by the restaurant and catering sector. In general, Italians have a marked preference for fresh products, are demanding as far as quality is concerned, and are generally disposed to pay the higher prices entailed. Supplier offers are consequently often judged less on price than on quality concerns.

In this context, the lobster market in Italy currently amounts to about 3500-4000 tonnes, split between the so-called "Aragosta", or *Palinurus* and related species, and the "Astice", or *Homarus* species. The total domestic catch runs to around 400-500 tonnes, 90% of which is Aragosta. Imports in 1991 made up some 85% of the market, more than half of this consisting of *Homarus Americanus* imported from the United States (1733 tonnes) and Canada (355 tonnes). Sales of the latter have grown at a substantial pace, almost doubling between 1989 and 1990, while showing a less dramatic but still significant increase of 25% in 1991. During 1992 there was a decline due to the current difficult economic situation, and 1993 is expected to show a further drop. People are dining out less frequently, and consuming less lavish meals than formerly. There is a potential market for prepared frozen products, mainly in the catering sector, but this will require patient development and promotion on the part of exporting firms.

DISTRIBUTION SYSTEMS

Italy's food distribution system is still characterized by myriads of small retailers served by several levels of equally small intermediaries. Supermarkets exist, but even by European standards constitute a relatively limited segment of the market. Even the largest importers and wholesalers cannot normally guarantee adequate distribution outside of their own provinces. The sheer numbers of firms involved and the many levels of intermediaries makes it difficult to follow the market. This lack of transparency is further fostered even by reputable firms, which may operate under several different names in order to cater to different clienteles or for tax reasons. Most firms do not normally belong to associations, seldom advertise, and conduct their business almost solely on the basis of personal recommendations. Naturally, such a situation is regularly exploited by less reputable and/or fly-by-night operators, who will frequently defraud unsuspecting suppliers (it is recommended when dealing with all but well-known and respected firms, business be done exclusively on letter of credit or equally guaranteed basis). Live lobster shipments from Canada to Italy are routinely consigned to Milan or Rome airports by both Italian and Canadian carriers, and cargo offices of both airlines are well aware of potential problems and how to resolve them. One of the main difficulties in the past has been the lack of direct connections from the Maritime provinces to Italy, and resulting potential problems involved in trans-shipment via intermediate airports.

PHYTOSANITARY REGULATIONS

In the case of live lobsters, the only certification required is a standard fisheries inspection certificate and an additional declaration that the mercury level is less than 0.7ppm. In the case of processed frozen products, Italian regulations governing so-called "surgelati" (quick-frozen products) require that the packing plant of origin be specially authorized by the Italian Ministry of Health. (Details on requirements can be obtained from Fisheries and Oceans Canada, Inspections Services Branch).

TARIFFS/NTB'S

Duty rates on lobster products are the same as for other EEC countries, and at the present time are as follows: H.S.0306.11 (25%); 0306.12.1 (8%); 0306.12.9 (16%); 0306.21 (25%); 0306.22.1 (8%); 0306.22.91 (8%); 0306.22.99 (16%); and 1605.3 (20%).

PROMOTIONAL ACTIVITIES

The only promotional activity for Canadian lobster in Italy thus far has been the participation of various Canadian exporters in the International Fishing fair in Ancona, and the Expo Food Fair in Milan. Given the nature of the market (exclusively in the catering and restaurant trade), this has been considered the best approach. The Milan Fair, in particular, offers unquestionably the best venue for promotion of fish products in Italy, and particularly for increased value-added products, which should soon begin to make in-roads particularly in the catering sector.

POST COMMENTS

Current strengths of Canadian firms include: 1) quality of raw material; and 2) good reputation as reliable suppliers. Current weaknesses include: 1) current stronger dollar; 2) lack of serious long-term interest by many firms in developing Italian market; 3) general need for more attractive packaging; and 4) lack of permanent agency agreements.

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NETHERLANDS

SUPPLY & CONSUMPTION

No lobster is produced in the Netherlands so that requirements must be imported. However, purchases are not made solely for the local market, a good part of the lobster that comes in is for export, mainly to neighbouring countries. This is typical of the Netherlands and its highly developed "gateway-to-Europe" function. Apparent consumption of lobster based on import and export figures has shown an erratic pattern over the past three years. While imports in 1989 and 1990 jumped, in relative terms exports lagged behind indicating substantial increases in consumption. The year 1991 marked a dramatic change in this trend, imports went up less strongly, but exports soared by as much as 60% resulting in a notable drop in consumption. The Dutch are modest buyers of popsicle lobster. The market for frozen lobster parts and meat is negligible mainly due to the uncomfortably high import duty set by the EC (165% and 20% respectively) and unfamiliarity with these types of products. The bulk of the lobster consumed in the Netherlands is still eaten in restaurants. Total imports of live lobster for 1991 were 1147 tonnes valued at Fls$21,486,000.

DISTRIBUTION SYSTEMS

Large importers of fresh lobster have their own basins where the lobsters are given a chance to "de-stress" after their flight. From there the lobsters are sold to regional distributors and wholesale supermarkets both locally and abroad, especially Belgium. One large Dutch importer is known to buy on behalf of companies in France, and thus benefits from discount prices for combined consignments (even involving a charter flight in the pre-Christmas season). Smaller importers with limited holding facilities cater to the restaurant trade and retail outlets in their areas rather than covering the whole market. For frozen lobster, popsicle lobster is usually bought in containerloads and distributed by the importer directly to retailers, both supermarkets and specialty fish stores. Lobster parts and meat as institutional products would be sold through wholesale supermarkets, which cater for a good part to the restaurant trade. Purchasing abroad in this case could be direct or through an importer.

TARIFFS/NTB'S

The duties currently applicable to imports of live lobster and lobster products into the Netherlands from Canada and other non-EC sources are as follows: live lobster (8%); frozen popsicle lobster (8%); frozen lobster parts (16%); frozen lobster meat (20%); and, canned lobster meat (20%). The duties are payable on the C.I.F. value of shipments. The Dutch V.A.T. on the above items currently stands at 6%, the V.A.T. is levied on the duty-paid value.

PROMOTIONAL ACTIVITIES

The Commercial Division of the Canadian Embassy in The Hague has actively participated in lobster promotions undertaken by a major local importer and, in recent years, a leading wholesale supermarket operation. These promotions up until now have focused on the hotel/restaurant and catering trades chiefly because it is felt that the higher the number of places where lobster is served, the greater the interest of local consumers will be in buying lobster for preparation at home. In 1990, the Post had a budget to do a lobster promotion (which was very successful); and the Post feels that even small budgets allocated for promotions on an annual basis would help to ensure continuity and sustain effectiveness. The interest and active support of the New Brunswick Department of Fisheries and Aquaculture in ongoing promotions in conjunction with a wholesale supermarket organization deserves special mention in this regard.

The manner in which the Dutch fisheries trade is organized and operates, does not lend itself to missions from Canada. Even participation in local fish trade shows probably would not be cost-effective. The Post says this against the background of a small country with a relatively large number of importers and traders, each of whom as a rule does not want his competitors to know whom he buys from, at which prices, and in which volumes. In other words, secretiveness still generally prevails.

The Post is pleased with the reinstatement of CALPA, the only source in Canada for material for generic lobster promotions, and looks forward to working with them on relevant local activities. The better part of Canadian lobster promotion in the Netherlands to date has been devoted to live lobster, but in early 1993, frozen lobster parts will be specially promoted at a major HRI-show in Amsterdam. Sponsors will include the Province of New Brunswick, VEN International Food Market, and hopefully KLM Airlines. If all works out as planned, chef Richard Chiasson will come over to the Netherlands for the third time to unfold the secrets of good lobster cooking.

POST COMMENTS

Benefiting from growing consumer affluence and a favourable Cdn$/guilder exchange rate, Canadian lobster exporters have done well in the Dutch market in recent years. Regular local publicity on the nutritional value of fish has helped to make fish increasingly popular in the Netherlands, a comparatively modest consumer of fish, but on a per capita basis (14.5 kilos) exceeding Canadians. Another factor that will have contributed to Canada's performance is the ability to ship lobster at a zero-to-low mortality rate. The Post has yet to receive a complaint from a local importer on the quality of Canadian lobster.

Of Canada's two major strengths, price and quality, price would appear the most vulnerable. It is determined by resource, exchange fluctuations, the availability of air cargo space, demand in export markets and, perhaps somewhat improbable, the formation of export consortiums or significant mergers of individual exporters. Canadian Atlantic lobster is among the worlds best controlled fish resources and this should guarantee future supply.

For the Netherlands, an important but the not the largest market for Canadian lobster in Europe, any price increases will have a negative effect on imports, but purchasing power domestically and in nearby countries is a significant determinant. Indications at present point to an economic downturn and consumer spending is beginning to decline. If this decline continues and prices should go up for whatever reason (improved demand in the U.S.; lower supplies; higher dollar), Dutch imports will likely go down in 1993, as opposed to a current estimated increase of 15-20% in 1993. It is difficult to predict if anything can be done to control the volatility of markets, but that growing potential in improving economies, by and large, will offset restrained demand in areas now hit by recession.

The decision of KLM to discontinue their regular Amsterdam-Halifax-Ottawa 747 run effective October 1992, has created a significant transportation problem. This service has been replaced by Martin Air, a Dutch charter company in which KLM has a majority interest. The 767 aircraft Martin Air operates have considerably less freight carrying capacity and the Dutch lobster importers were forced to look for alternatives, many of which fly to airports in nearby countries.

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NORWAY

SUPPLY & CONSUMPTION
The Norwegian market for lobster is small, but growing, and local production is negligible. Demand is largely from restaurants and the catering trade which are primarily buying live lobsters. There is limited demand for some frozen in brine, and popsicle bags for the consumer market. The main supplier of lobster to the Norwegian market is Scotland.

DISTRIBUTION SYSTEMS
Wholesale distribution of lobster is conducted to a few retail outlets in the Oslo area. Live lobster must be boiled at the port of entry, but Norwegian authorities will accept cooking after distribution. Live lobster cannot be held in tanks.

PHYTOSANITARY REGULATIONS
Phytosanitary regulations are very strict, and appropriate certificates are required. Norwegian Food Health authorities are especially on the look-out for Gaffkemia disease. In addition, an import licence is required for all lobster imports.

TARIFFS/NTB'S
All lobster products enter Norway free of duty except for H.S.1605.3, which has a NOK$0.37 per kilo duty. There is a 20% V.A.T. which applies to all products.

PROMOTIONAL ACTIVITIES
There are a number of various promotional activities which should be considered by Canadian lobster exporters wishing to expand sales to the Norwegian market. They include: 1) presentation of Canadian lobster at major restaurants; 2) a lobster theme night or week, by bringing Canadian chefs to Oslo, Bergen and Trondheim; 3) invite current and potential importers and end-users to promotional activities; 4) media advertising and coverage of Canadian products; and 5) recipe distribution and development.

POST COMMENTS
Canadian lobster has a very good reputation in the Norwegian market, but exporters need to show more interest and visit the territory more often, as well as increasing advertising.

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POLAND

SUPPLY & CONSUMPTION
Consumption of lobsters in Poland is almost negligible, largely due to its status as a highly luxurious product. Lobster is not a traditional food, and it is rarely available in retail stores.

DISTRIBUTION SYSTEMS
If lobster is to be imported, the most probable distribution channel would be through the local fish importers and distributors already in business.

PHYTOSANITARY REGULATIONS
Imports of lobster require an exporters health certificate.

TARIFFS/NTB'S
There is an import tariff of 30% on lobster entering Poland.

PROMOTIONAL ACTIVITIES
Any promotional activities in the market would have to start from scratch, due to the unfamiliarity of the product to local consumers. The best possibilities would be to target the high class restaurants in the major hotels which would at least provide a determination if limited demand exists.

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PORTUGAL

SUPPLY & CONSUMPTION

The total market size in Portugal for lobster ranges from 1100-1250 tonnes per year, of which 350-360 tonnes are supplied by imports, and the remaining 780-890 tonnes by domestic production. Imports by Portugal of lobster in 1991 totalled 354.9 tonnes, valued at Cdn$5.4 million, of which 76.4 tonnes consisted of live rock lobster, 47 tonnes of live *Homarus*, 218.8 tonnes of frozen rock lobster, 10.6 tonnes of frozen *Homarus*, and 2.1 tonnes of cooked lobster, not frozen. Primary import sources of supply are: France, Cape Verde and Brazil (live product); and Cuba, France, Spain and India (frozen product). Since 1987 when for the first time Canadian lobster appeared on the Portuguese market, Canada has been exporting some quantities of lobster in both frozen and live form.

The Portuguese have a clear preference for live lobsters, with the European *Homarus* and rock lobster being the favourite species. The 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. The most common size of lobster (in both live and frozen forms) is 500-1500 grams. Canned lobster meat consumption is very low, and therefore opportunities for imports are negligible.

DISTRIBUTION SYSTEMS

The live lobster market is served by a few specialized importers and distributors. sales of the frozen product are handled by a number of frozen fish importers and distributors.

PHYTOSANITARY REGULATIONS

By the Order-in-Council (Portaria) no. 559/76, dated September 7, 1976, inspection and control are mandatory for fish and fisheries products, fresh, processed or in any way preserved, destined for human consumption. For imported fish and fisheries products, the inspection and control are done at customs points by the Portuguese Livestock Veterinary Services. The Portaria requires that consignments of fish and fisheries products imported from abroad be accompanied by a health certificate issued by the competent authorities of the exporting country, certifying that the exported products are in good health conditions for human consumption. This health certificate must be accompanied by an official Portuguese translation. Translation must be recognized, by a Portuguese notary if done in Portugal, or by a Portuguese consul in the exporting country if done in that country.

TARIFFS/NTB'S

The following duties apply to lobster products imported into Portugal from Canada: H.S.0306.11.1 (26%); 0306.21 (26.2%); 0306.12.1 (11.3%); 0306.22.1 (11.3%); 0306.22.91 (11.3%); and 1605.3 (21.2%).

PROMOTIONAL ACTIVITIES

Canadian exporters are encouraged to visit Portugal to attend, or if possible, to participate at Alimentaria, a major food trade show scheduled to be held from May 12-16, 1993 in Lisbon. Trade Commissioners would assist the industry in organizing a promotional event where retail outlets and hotels could sample the product. The best timing would be in May 1993, during the Alimentaria food show.

POST COMMENTS

Canadian lobster exports are being impeded by the lack of direct air routes from the principal Canadian cities in the Atlantic provinces to Lisbon. There are only three weekly flights direct from Toronto (two via Montreal) to Lisbon. In most cases, air connections between Halifax and Lisbon have to be made through Amsterdam or London. Exports are also limited by the lack of appropriate tanks in Portugal to hold the Canadian product. In addition to these difficulties, shipments from Canada of lobster products face quite significant tariff disadvantages vis-a-vis traditional supplying countries.

One challenge for Canadian exporters would be to develop promotional materials in Portuguese to promote Canadian lobster as a product of quality (eg. clean, cold waters, Canada's seafood inspection system as a guarantee of quality, etc.). Another challenge for Canadian exporters would be to consider establishing a holding, or distribution facility in Amsterdam, Paris, or Madrid, to serve the whole European market.

The present exchange rate is a major contributing factor to Canada's competitiveness. The Escudo which traded at 139.6 in June 1991, is now worth approximately 110.0 to one Canadian dollar. The low Canadian dollar enhances the ability of Canadian exporters to compete with the traditional suppliers in the Portuguese market. Another strength is the size of the Canadian industry and its excellent quality control. The relationship established between Canadian and Portuguese firms currently engaged in the lobster business in Portugal, could become an effective vehicle for joint efforts to promote sales of Canadian lobster.

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Beirafrio-Industria de Prod. Alim. S.A.
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RUSSIA

SUPPLY & CONSUMPTION

Efforts to obtain information on the market size and import statistics from Russian fisheries authorities did not yield any results, and the Post was informed that there is no market for lobster in Russia. Traditionally, Russians have not been important consumers of lobster products, the preference has been for products such as crab and prawns which can be sourced domestically. Given the hard currency shortages, domestic price considerations favour the lower end products. While the price of fish has increased dramatically over the past year, generally it would be uneconomical for Canadian exporters to sell lobster for roubles through the state distribution channels.

DISTRIBUTION SYSTEMS

There is a growing hard currency market for lobster among Russians and expatriates through non-state channels. The product is distributed mostly to restaurants and hotels with some retail directly to expatriate and hard currency earning Russian consumers. A Canadian joint venture with the Moscow Aerostar Hotel, for example, imports live lobster on a weekly basis from a Canadian company in Nova Scotia. In addition, a recently established Canadian/U.S. firm, Moscow Lobster and Fish Company, is sourcing product from Nova Scotia and the American northeast. The current price is US$10.50 per pound. There is some competition from German and United Kingdom firms which are distributing frozen lobster tails and European lobster, but despite lower transportation costs, they are not price competitive vis-a-vis the North American product.

PHYTOSANITARY REGULATIONS

A health inspection certificate is required for lobster products entering Russia. For some fish products such as salmon, Russian inspectors require explicit confirmation that the product has been tested for certain diseases. In the case of lobster, a standard Canadian Fisheries and Oceans certificate that indicates the product is fit for human consumption is sufficient.

TARIFFS/NTB'S

Lobster imports currently face a 15% tariff, but this may change when Russia introduces new customs tariffs in 1993.

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POST COMMENTS

Canadian lobster exports are being impeded by the lack of direct air routes from the principal Canadian [illegible] provinces to Lisbon. There are only three weekly flights [illegible]

[illegible]

One challenge for Canadian exporters would be to [illegible] promotional materials [illegible] promote Canadian lobster as a product of quality (eg. clean, cold waters, Canada's [illegible] system as a guarantee of quality, etc.). Another challenge for Canadian exporters would be to consider [illegible] distribution facility in Amsterdam, Paris, or [illegible]

[illegible] lobster business in Portugal, could become an effective vehicle for joint efforts [illegible] Canadian lobster.

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SPAIN

SUPPLY & CONSUMPTION

Fisheries landings by species are not published by the Spanish government, but the domestic lobster catch is small and only meets a fraction of demand. Traditional preference in Spain has been for domestic lobster (some *Homarus*, but mostly spiny) from the Galicia region in northwest Spain, followed by spiny lobster imported from the United Kingdom, Ireland and France. Third in order of preference is spiny lobster from Morocco, then North American lobster for which there is a growing recognition and acceptance. Imports from Portugal (Azores) are mostly rock lobster, considered inferior in quality. Cuban lobster is at the bottom of the list, but sells well due to the low price and constant availability. The latest Spanish customs statistics are for 1991 and show the following imports: H.S.0306.11 (426 tonnes); 0306.12 (20 tonnes); 0306.12 (269 tonnes); 0306.22 (955 tonnes); and 1605.3 (7 tonnes). Total C.I.F. value for all imports of lobster in 1991 was approximately Cdn$1 million.

DISTRIBUTION SYSTEMS

For airfreight shipments, live product is shipped to Madrid, Bilbao, or Barcelona. If direct flight connections are not available at time of shipment, second preference is usually via KLM in Amsterdam which is respected for fast forwarding. London Heathrow is avoided due to frequent delays. Other frequent carriers include Canadian, TWA, and American Airlines.

Spanish importers represent the first link in trading pattern, as they are main suppliers to wholesalers, retail outlets, and restaurant trade, which in most cases, do not import for their own account. For many years, all Spanish food importers must be registered with the Ministry of Health and are identified by their registration number. Spanish importers are legally responsible for the goods they introduce into the Spanish marketplace.

PHYTOSANITARY REGULATIONS

Documentation accompanying shipment must include a Fisheries and Oceans Canada certificate, a commercial invoice showing F.O.B. and C.I.F. prices, and a certificate of origin stamped by the nearest Canadian Chamber of Commerce or Spanish Consulate in Canada.

TARIFFS/NTB'S

The tariff structure for lobster products entering spain from Canada are as follows: H.S. 0306.11.19 (24.5%); 0306.11.9 (22.8%); 0306.12.1 (8%); 0306.12.9 (15%); 0306.21.11 (21.9%); 0306.21.19 (24.5%); 0306.21.9 (22.8%); 0306.22.91 (7%); 0306.22.99 (8%); and 1605.3 (20%). All lobster products are subject to a 6% V.A.T. Usual payment conditions are C.A.D., or irrevocable letter of credit.

PROMOTIONAL ACTIVITIES

The Post feels that marketing initiatives for Canadian lobster in Spain in recent years, including participation of some exporters at Alimentaria International Food fair, held in Barcelona in 1990 and 1992, mistakenly concentrated on frozen product without any publicity support. Sales of popsicle packs have so far been modest, as advertising and promotional activities will be necessary to make any headway.

POST COMMENTS

Canadian suppliers have made almost no effort to market frozen lobster claws for which there is good potential. At present, the prospects for marketing cooked, chilled or frozen canned products are remote as they do not conform to current consumer habits. Local trade contacts advise that potential lies with guaranteeing year-round, prompt deliveries of live lobster with minimal price fluctuations (particularly in view of high tariff barriers). There is little or no public sensitivity to the sale of live lobsters in the local market. One Canadian lobster company appears to have overcome problems with reduced meat content in live lobster at certain times of the year, and another Canadian company which has actively addressed Spanish demands. Otherwise, in spite of numerous enquiries the Post has passed to Canadian suppliers, response has been very weak. No Canadian lobster exporter, as far as Post is aware, has appointed a Spanish agent or distributor, or undertaken any supportive publicity or advertising campaign which is required if Canada is to increase its currently meagre share of this important market.

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SWEDEN

SUPPLY & CONSUMPTION

Swedish per capita consumption of shellfish and seafood in general is very high. The local annual catch of lobster totalling about 19 tons (live weight) is by no means meeting demand. Norway and Scotland were the main foreign suppliers until Canadian and U.S. frozen lobster cooked in brine captured the market, a market which is now being complemented by Canadian and U.S. live lobster. Local fresh fish wholesalers and some fishermen have always supplied the majority of the lobster in the fresh, already boiled form, to the market. When the North American cooked frozen lobster, which soon became known as the "Canadian" lobster was introduced, it proved to be an excellent complement to the fresh lobster (not only for the individual customers but also for restaurants) in that it was far less perishable and also available at lower prices. Moreover, because of its long shelf life, the cooked frozen lobster can be distributed on a nation-wide basis reaching remotely located areas far away from major shopping centres and/or fresh fish stores. Frozen cooked lobster really captured the market, and in the boom year of 1990, Swedish imports totalled 508 tons of which Canada supplied 95%, or 482 tons. There was some carry over from 1990, but total imports in 1991 dropped to 304 tons, but Canadian marketshare rose to 98%. There is thus no real competition from other national suppliers for the cooked frozen lobster, nor is there any local production.

Swedish consumers in general (private and restaurants), except those on or close to the Swedish west coast, are not likely to become accustomed to buying and/or handling live lobster. With this pattern follows a general disinterest among local restaurants in installing holding tanks for receiving live lobster. Instead the importers and wholesalers are the targets for live lobster sales. These firms have hitherto shown a moderately growing interest in sourcing live lobster in North America. These lobsters, when boiled, are sold fresh at prices around SEK$198, while locally caught boiled command a far higher price from SEK$298 and up per kilo for gourmet reasons, coupled with scarcity. Of Sweden's imports in 1991 totalling 106 tons, Canada supplied 39 tons, whereas the U.S. secured a larger market share of 59 tons. Processed canned or frozen lobster meat consumption shows a downward trend, because the products have become very expensive. Canada is by far the predominant supplier with 45 tons of Sweden's total imports of 48 tons. There is no local production.

Sweden's current deep recession with the shut-down of industries, business enterprises of all nature, hotels and restaurants, coupled with unemployment rates growing to 1930's levels, will no doubt have a negative effect on local demand for luxury shellfish such as lobster. Local government's drastic cost saving packages will heavily reduce the Swedish consumers purchasing power. Also, the recent devaluation of local currency makes imported products more expensive. Market prospects for 1993 are thus not optimistic.

DISTRIBUTION SYSTEMS

Nation-wide wholesale distribution of whole lobster frozen in brine is to retail chains, independent grocery stores, restaurants, and the catering sector. Lobster meat, frozen has national wholesale distribution primarily to restaurants and the catering trade, with a minimal amount absorbed by retail stores. As for live lobster, importing seafood wholesalers bring in lobster, and boil them for distribution to restaurants and fresh fish retail stores. Also, importers deliver lobster to fish wholesalers for processing (cooking) and distribution as described above. Insignificant volumes of live lobster is sold direct into restaurants, and only on an ad hoc basis for special shellfish menu weeks.

PHYTOSANITARY REGULATIONS
There are no special phytosanitary regulations for lobster products entering Sweden. Health authorities and/or a veterinary service, undertake inspections of incoming shipments on an ad hoc basis. Such inspections do not appear to have constituted any problems for Canadian lobster sales to Sweden.

TARIFFS/NTB'S
All lobster products enter Sweden duty free from Canada, however, as of January 1, 993, there is a V.A.T. of 24%, up from the previous V.A.T. of 21%. Lobster less than 22 centimetres in length (from the forehead to the end of the last tail transom), may not be imported and/or sold locally. Live or whole cooked lobster may not be imported from July 15 to September 15 inclusive. There are no restrictions applied to distribution, wholesale or retail of lobster during the import restriction period.

PROMOTIONAL ACTIVITIES
In view of conditions currently prevailing in Sweden, the Embassy trade officers believe it would not be opportune, nor productive, to plan any special promotional activities, at least not for the calender year 1993. The Embassy will instead work closely with local companies handling Canadian lobster in an effort to assist them in maintaining the excellent market that has been built up during the last few years.

POST COMMENTS
With cooked whole frozen lobster in brine, Canada's strong sectoral capacity has no doubt contributed to success in the local market. Competition only exists amongst Canadian suppliers to this market. This also applies to cooked lobster meat, whether frozen cryovacs or canned. Popsicles (now referred to locally as the Canadian lobster) often appear as "week-end" bargains in the large nation-wide food retail chains. At these occasions retail prices have been very low, often just somewhat over the actual landed price. One gas station chain has also occasionally had Canadian popsicle lobster for sale at "rock bottom" prices. These bargain occurrences have a negative effect on the consumers perception of lobster as a gourmet or luxury item, particularly when the product is sold at gas stations. Popsicles not only occupy large cold storage space, they are also tricky to handle and thaw. Local buyers (particulary in the restaurant trade) would welcome a "lighter" product (ie. a whole cooked lobster, frozen with less or no brine/water, in say, cryovacs or alike). Live lobster from North America have entered the market as substitutes and complements to the limited supply of local or Norwegian lobster, Overseas lobsters are claimed to be irregular in quality, often with less meat in the claws and tails. Imported product priced accordingly by the local trade, giving Nordic lobster premium price and North American far less.

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SWITZERLAND

SUPPLY & CONSUMPTION

Switzerland's fish consumption is rather small, with per capita consumption of fish, crustaceans and molluscs amounting to 7.7 kilos per year. Local production only meets 9% of demand. Import statistics for 1991 were as follows: H.S.0306.11 (110 tons valued at SFR$4,200,000); 0306.12 (38 tons valued at SFR$700,000); 0306.21 (7 tons valued at SFR$200,000); 0306.22 (263 tons valued at SFR$4,600,000); and 1605.3 (9 tons valued at 140,000). In 1991 and 1992, live lobster accounted for the highest share of total lobster imports. The main supplier is the United States, followed by Canada and France. During this period, it was Canada who increased its marketshare modestly, from 48 tons to 62 tons (U.S. imports increased from 165 to 169 tons), whereas imports from France decreased from 20 to 18 tons. Lobster is also imported frozen in brine and canned. In 1991, Canada was the main supplier, but imports have disappeared completely. It seems that the competition is mainly from spiny lobster (*Palinuras spp.*), for which Canada has no source of supply. Whereas, the United States and Canada are the leading suppliers of North American and European lobster (*Americanus/Homarus gammars*).

With lobster being a luxury item, its market in Switzerland is rather small. In the past few years, the market has been small but growing. Switzerland is presently suffering a severe recession which, as a first step, is reflected in the decline of luxury items such as live lobster in high class hotels and restaurants. The Post has been told that, in order to maintain the number of clients, restaurants switched from high but more expensive quality lobster (eg. Canadian), to a cheaper or inferior quality product coming from the United States. It is feared that as a result, the reputation for live lobster will diminish.

DISTRIBUTION SYSTEMS

Importers of live lobster sell directly to hotels, restaurants and fine food outlets. Frozen in brine is mainly sold by Department stores (eg. Migros, Switzerland's most important food chain).

PHYTOSANITARY REGULATIONS

Imports are subject to a veterinary control at the border for which a tax of SFR$4.00 per kilo gross weight is levied. Lobsters can only be imported under the condition that their claws be fixed with rubber bands (pegged lobsters, ie. a piece of wood between their claws are prohibited). Import regulations for lobster are outlined in "*Conditions d'importation pour la viande et les preparations de viande de poissons, crustaces, mollusques etc.*". Shipments must be accompanied by the Public Health Certificate for the importation of fish preparations, crustaceans, molluscs, sea urchins and products thereof. Supplies which are not accompanied with this certificate will be returned.

TARIFFS/NTB'S

Imports of lobster by licensed Swiss importers are duty free.

PROMOTIONAL ACTIVITIES

Due to the present recession, the market for lobster is far from being encouraging, Canadian suppliers should not abstain from undertaking promotional activities. On the contrary, Canadian exporters should increase their efforts by encouraging restaurant promotions for live lobster and promotions in department stores for frozen lobster in brine. Consideration should also be given to promotion at food fairs in Switzerland such as IGEHO in Basel in 1993, and Gastronomia in Lausanne in 1994.

POST COMMENTS

It seems obvious that Canada's strength is in the export of live lobsters. It is hoped that, despite the recession, Canada can maintain its position during this period and hopefully increase its exports to Switzerland in the long run.

One supplier has drawn attention to the following transportation problem. During the summer months, live lobster is delivered by Air Canada, arriving at the Zurich airport at 10:00a.m.. the product is immediately inspected by the veterinarian and cleared through customs to be distributed in the shortest time possible. However, during winter (as of November 1), Air Canada ceases respective flights and they are forced to take Swiss Air. Unfortunately, Swiss Air flights only arrive in the afternoon and distribution is often delayed until the next morning. Another importer purchases live lobster from a U.S. supplier located in Boston via Swiss Air. He claims that 80% of those lobsters are of Canadian origin, but appear as U.S. lobsters in the import statistics. This U.S. supplier is apparently well placed to provide excellent services by having a lobster tank and excellent packaging facilities. Prior to departure, the requested amount of lobster is taken from the tank, packed in 15-20 pound styrophor boxes, and directly flown to Switzerland.

Migros has completely ceased the import of live lobster, claiming the animal and environment protection organizations impose too much pressure on the trade, and thus further harming the already recession stressed business. Kassenstrurz, a television broadcast for the protection of consumers, featured the above topic in December 1992. The station will want to discourage consumers from buying live lobster for the Christmas season, and again harm business, in this case, the Christmas business is the most lucrative time for live lobster. A similar campaign was broadcast a few years ago with respect to farmed salmon. It was pointed out that farmed salmon had to be treated with antibiotics in order to reduce the death rate, and that very often the presence of listeria was proved. The trade then claimed that the broadcast negatively influenced the Christmas business. Clearly, animal protection organizations are putting pressure on consumers with respect to some seafood products.

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UNITED KINGDOM

SUPPLY & CONSUMPTION

Canadian lobster now dominates the live lobster market in the United Kingdom. Domestic landings are less than 1000 tonnes per annum, and much of these are exported to France. The United States has a much smaller share of the U.K. market than Canada, although some Canadian suppliers do move product through Boston. There is no canned or frozen product produced locally. Import statistics suggest that a large quantity of frozen U.S. lobster entered the market last year. This is a phenomenon, that after talking with the trade, which might be due to a misclassification at point of entry by customs and excise. Sales of frozen product have been relatively static in recent years. It is hoped that new types of pack may improve sales, but the U.K. has been in sharp recession for two years, which has made it a tough market to launch the product. Of interest is the success of one supermarket chain in selling whole cooked chilled lobster last summer.

The live lobster business accounts for the major market currently, and is almost exclusively to restaurants. A very small sector of the population, mainly ethnic Chinese, buy live lobster to cook at home, but most British people would be appalled at the idea. They tend not even to like to seeing lobster live in restaurant tanks, and then "condemn them to death" by choosing them for their meal.

There has been recent interest in supermarkets in selling cooked (in Canada) chilled lobster with some success last summer. However, the very stringent new U.K. Food Act, with its call for "due diligence", means that very strict quality control conditions are applied to Canadian suppliers of cooked product, and the U.K. importer assumes legal responsibility for compliance with the Act. This is especially important with the short shelf-life chilled product, and leads importers to stick with suppliers that they have established good relationships.

The market for traditional frozen products is fairly static. Popsicle packs are sold in supermarkets and freezer centres. Some importers (eg. Princes and Ross), have put their own cartons on to improve the appearance of the product. Cold pack (frozen, canned) is no longer sold at the retail level because of consumers unfamiliarity with a canned product which has to be kept frozen, and fears on the part of retailers that the can might be stored incorrectly, thereby leading to food poisoning, or at least customer complaints. The limited cold pack sales which occur are for foodservice purposes. Supermarkets, freezer centres and foodservice outlets are all supplied by traders.

Import statistics for lobster products entering the U.K. market for 1991 were as follows: H.S.0306.11 (37,627 kilos valued at £483,939); 0306.12.1 (508,233 kilos valued at £2,793,762); 0306.12.9 (53,463 kilos valued at £261,962); 0306.21 (3332 kilos valued at £42,318); 0306.22.1 (784,014 kilos valued at £4,225,162); 0306.22.91 (25,080 kilos valued at £119,417); 0306.22.99 (12,530 kilos valued at £108,381); and 1605.3 (91,807 kilos valued at £498,829).

DISTRIBUTION SYSTEMS

Traders generally perform an intermediary role for local or imported lobster and they supply restaurants, supermarkets and fishmongers. Some traders are based at wholesale fish markets, particularly Billingsgate, while others operate their own delivery service, particularly useful when servicing the restaurant trade with live lobster.

PHYTOSANITARY REGULATIONS

As of January 1, 1993, fisheries products entering the EC are subject to EC Directive #675 which contains stringent provisions with respect to inspection. Because of the initial problems experienced under EC Directive #675, the European Community has temporarily stopped enforcing the directive until higher quality inspection equipment can be put into place. Canada has asked to be granted a derogation from EC Directive #675. The EC must first evaluate the Canadian Quality Management Program (QMP), which will include inspection of Canadian operations, to determine if Canada will be granted a derogation.

TARIFFS/NTB'S

Tariffs are standard throughout the EC and are levied on the C.I.F. value. Live and whole chilled or whole frozen (cooked or uncooked), 8%; frozen lobster, other than whole, in shell, cooked, chilled or frozen, 16%; lobster, prepared or preserved (eg. cooked and out of shell such as cold pack or meat pack or meat packs) 20%. From January 1993, as part of the single market process, live animals (including live lobster) may only enter the EC at designated points. Once inside the EC they may move freely. The U.K. has designated the following airports: Heathrow, Gatwick, Stansted, Luton, Birmingham, Manchester and Glasgow. Sea ports to apply are Bimmingham, Tilbury, Felixstowe, Harwich, and possible Liverpool. All these now have three years to bring themselves up to standards required, but as of January 1, 1993, no other points of entry for non-EC live animals may be used.

PROMOTIONAL ACTIVITIES

Trade officers have coordinated ongoing lobster promotional programme over the past four years. Initial efforts were concentrated on the trade and trade press, and Canadian lobster is now well known in the trade. The focus of current activities is now more towards consumers. The Embassy has supported a restaurant promotion in the North of England during the last two summers, and last year a restaurant promotion at the prestigious Savoy Hotel in London. The Post plans to repeat both in 1993 and to identify others, preferably with hotel and restaurant chains, in addition to monitoring developments of sales in supermarkets to identify any appropriate promotional activities. A generic campaign will be mounted in 1993 for Canadian lobster. A major biennial food fair is the International Food Exhibition (IFE), which takes place from April 25-29, 1993 in London. In addition, a good promotional video showing the Canadian lobster fishery, talking about management of the resource, and dealing with how to handle a whole live lobster, would be very useful for a number of applications. Recent promotional material from CALPA (folder with information sheets) is good, and will helps trade officers in their work.

POST COMMENTS

A Canadian strength lies in ability to supply the market. Canada is very fortunate in that because of the abundance of the resource, it can offer closely graded live lobster to the U.K. market much more effectively than domestic producers. Also, given favourable flight schedules, importers can telephone one evening and receive the product the next morning. However, there has been a worrying reduction recently in direct flights from Halifax to London, and this is causing concern with U.K. importers. Through November 1992, there was effectively only one direct flight a week. Boston, of course, has a greater choice of carriers, and there is probably little that can be done about this problem, but it is a concern. Canadian live lobster generally enjoys a much better quality image than American product. However, the latter tends to be cheaper, and some traders buy it when Canada has soft-shelled lobster. There is a certain snobbery about local lobster, particularly Scottish product. Some of the most exclusive chefs claim that the Scottish lobster is better. However, the supply is so small, and the price so high for most of the year, that it is not a serious competitor.

IMPORTERS/USERS

Ross Young Limited
Ross House, Wickham Road
Grimsby, South Humberside DN31 3JP
Contact: Mr. M. Thomson
Tel:(047) 235-9111
Fax:(047) 224-0640

Clouston Foods (Europe) Ltd.
924 Oxford Road, Tilehurst
Reading, Berks RG3 6TB
Contact: Mr. P. Byrne
Tel:(073) 442-5544
Fax:(073) 441-0051

Watt Fish
Unit 5, Torrview Industrial Estate
East Allington. Totness
Devonshire TQ9 7QQ
Contact: Peter Watt
Tel:(05) 485-2448
Fax:(05) 485-2292

M & J Seafoods
39 Rabans Close
Aylsbury, Bucks HP19 3RS
Contact: Chris Harris
Tel:(029) 643-2711
Fax:(029) 643-1793

New England Lobsters International
20 Smugglers Way
Wandsworth, London SW18
Contact: Fred Stroyan
Tel:(081) 877-1175
Fax:(081) 877-1118.

Homarus Catering Supplies
Unit 2, St. James's Mews
276 St. James's Street
London SE1 51X
Contact: Mr. Walder
Tel:(071) 237-3012
Fax:(071) 237-3012

Anchor Seafoods Limited
Devonshire House, Handcross
West Sussex RH17 6BJ
Contact: Edwin Young
Tel:(044) 440-0363
Fax:(044) 440-0949

C.H. Nye Limited
53 New Billingsgate Market
London E14
Tel:(071) 515-7874
Fax:(071) 538-2413

Shellfish Seafoods
Watling Street
North Hinkley, Leeics
Contact: David Freeman
Tel:(045) 563-2481
Fax:(045) 525-0861

Aberdeen Prime Fish
73 Netherlands Road
Oakleigh Park
Barnet, Herts. EN5 1BS
Contact: Mr. T.A. Tobey
Tel:(081) 446-4148

Minch Group
393 Liverpool Road
Islington, London N1 1NB
Contact: Mr. F. Doyle
Tel:(071) 700-5736
Fax:(071) 700-5738

Midfish
Ocean House
Wholesale Markets Precinct
Pershore Street
Birmingham B5 6UU
Tel:(021) 622-5171
Fax:(021) 666-6943

Sea Products International
Wholesale Market Precinct
Pershoe Street, Birmingham B5 6UU
Contact: Oliver Giblin
Tel:(021) 622-5111
Fax:(021) 622-6123

C. & A. Seafoods
Office 88, New Billingsgate Market
London E14
Contact: Mr. C. Seagrave
Tel:(071) 515-9192

Ramus Seafoods
Ocean House, Kings Road
Harrogate, Yorks HG1 9XX
Contact: Chris Ramus
Tel:(042) 356-3271
Fax:(042) 353-1040

Simson's Fisheries, Shrewville Ltd.
Imperial House, Redlands
Coulsdon. Surrey CR3 2HT
Contact: Tim Lucas
Tel:(081) 668-0931/2
Fax:(081) 668-2396

Network Fisheries Limited
West Quay, New Haven
East Sussex BN9 9BT
Contact: Mr. P. Ellis
Tel:(027) 351-3884
Fax:(027) 351-7884

For Further Information Contact:
Canadian High Commission
Officer: Janet Farmer
Macdonald House
One Grosvenor Square
London W1X 0AB, England
Tel:(011-44-71) 258-6600
Fax:(011-44-71) 258-6384

ASIA/PACIFIC

AUSTRALIA

SUPPLY & CONSUMPTION

Apparent 1990/91 domestic consumption of lobster (all types) was estimated at 5533 tonnes, of which 218 tonnes was imported. Australia is a major producer of rock lobster and it exports over 70% of its production to Southeast Asia and the United States. Imports of frozen lobster (*Homarus spp.*) are principally from Thailand, Papua New Guinea, Mexico, Cuba and Canada. Imports of rock lobster are mainly from Thailand, Papua New Guinea, the United States and Canada. Market preference is for small fresh or chilled whole lobster and fresh, chilled or frozen tails.

Import statistics for 1990-91 for H.S.0306.12.0002 (*Homarus spp.*, frozen) totalled 175,019 kilos, valued at Aust$3,040,000. Imports from Canada totalled 18,084 kilos valued at Aust$293,000, and there were no imports the two previous years. Local importers claim that there have been little or no imports from Canada in the last 10 years, as prices for Western Australia and Tasmanian lobsters have dropped significantly. The 1990-91 imports from Canada were made by a Western Australian supermarket in mid-1991 as part of a major seafood promotion. However, the promotion was not a success and 4130 kilos were re-exported to Japan. Import statistics for H.S.0306.11.001 (rock lobster, frozen) totalled 45,987 kilos valued at Aust$783,000. Imports from Canada were 4500 kilos valued at Aust$75,839. Import statistics for H.S.0306.21.006 (rock lobster, other than frozen) totalled 4186 kilos valued at Aust$74,000. Imports statistics for H.S.0306.22.007/0306.22.008 (*Homarus spp.*, other than frozen) totalled 34,326 kilos valued at Aust$628,000.

DISTRIBUTION SYSTEMS

Product distribution is on a state basis. Domestic lobster from Western Australia and Tasmania are sold through distributors, while imports are handled by brokers and distributors.

PHYTOSANITARY REGULATIONS

There are no special quarantine requirements for frozen lobster. Raw and cooked crustaceans are examined for cadmium, with a maximum concentration allowed of 0.2 mg/kg. Cooked crustaceans are examined for staphylococcal enterotoxin rather than the staphylococci organisms. Due to quarantine concerns (virus fungi-crayfish plague), trade in live lobsters from countries other than New Zealand is prohibited.

POST COMMENTS

The Australian market is dominated by fresh rock lobster, but there are limited opportunities for imported frozen rock lobster and *Homarus spp.*. Comments from trade are that Canadian lobster is not seen as desirable commodity in view of low prices of domestic fresh lobster. Possibilities would exist for extra large whole frozen lobster, which would be seen by the consumer as clearly different from local lobster and for processed lobster portions.

For Further Information Contact:

Canadian Consulate General
Canada House, Level 5, Quay West
111 Harrington Street
Sydney, N.S.W., Australia 2000
Tel:(011-61-2) 364-3000
Fax:(011-61-2) 364-3098

HONG KONG

SUPPLY & CONSUMPTION

The market size of foodstuffs in Hong Kong is estimated at approximately Cdn$3.85 billion, of which 80% is supplied by imports and 20% by local production. The daily consumption for the Hong Kong population is 1010 tonnes of rice, 1090 tonnes of vegetables, 9300 pigs, 460 head of cattle, 300 tonnes of poultry, 460 tonnes of seafood and 1320 tonnes of fruit, largely imported from China, Taiwan and neighbouring countries. However, with the continuous growth of supermarkets and the change in eating habits among the younger Chinese, western style processed foods, frozen foods and packed items have become more popular. Substantial quantities of these items have been imported from abroad to satisfy local demand. Many world renowned brands such as Del-Monte, Campbell, Bird's Eye, Sara Lee, Kraft, Nabisco, Heinz, etc. are easily available in the local supermarkets. A decade ago, very few Canadian food products were available in this market. Since the Solo Food & Beverage Show held in 1987, followed by the continuous effort by the High Commission in arranging in-store food promotions over the last four years, a good selection of quality food products has been introduced into the marketplace.

Currently, almost all lobster available in this market is in live form. Due to the grouping of this item under one general category, it is not possible to provide exact information regarding quantities imported from various sources. According to trade contacts, annual consumption will be approximately 1000-1500 metric tonnes. Sizes 1-1.5 lb is more preferable for hotels and western style restaurants, for Chinese restaurants, larger sizes are preferred. Main supplies are from Australia, New Zealand, the United States and Canada, with some from local waters and neighbouring countries. Canadian exports of lobster showed a steady increase reaching approximately 75 metric tonnes in 1990. The demand is expected to grow steadily at approximately 15-20% annually. Demand for lobster tails also exists in the market, approximately 500 metric tonnes per year, with Australia, New Zealand, China and Cuba as the main suppliers. Hotels and restaurants provide the main demand for lobster tails, with somewhat limited potential for quick frozen, frozen in brine, and canned lobster.

DISTRIBUTION SYSTEMS

Live lobster is normally shipped by air. Some importers take delivery upon arrival and distribute the product to customers immediately, while others store lobsters in tanks and later deliver product to buyers on a daily basis. It is estimated that imported food products are imported into Hong Kong as follows: importers (70%); wholesalers and distributors (10%); retailers and supermarkets (10%); and end-users, hotels and restaurants (5%). Wholesalers sometimes purchase for their own accounts. The majority of wholesalers, because of their tight financial situation, draw supplies for stocks from importers who provide them with special terms and credit facilities. Hotels, restaurants and other food establishments do not usually purchase directly from the suppliers, but rather from the importers or wholesalers on a contractual basis for a period of three or six months on prices agreed upon by both parties. Normally, prices are controlled by the importers who sell to wholesalers and retailers at the same price level, with discount or commission to wholesalers.

PHYTOSANITARY REGULATIONS

All airfreight shipments of lobster require a health certificate issued by a competent authority from the exporting country certifying that the product is packed under hygienic conditions and is fit for human consumption. Failing to provide proper documentation may delay customs clearance upon arrival. Canada's phytosanitary and other quality standards satisfy Hong Kong authorities.

POST COMMENTS

The quality of Canadian lobster is recognised as being superior, when compared to other suppliers. The present way of shipping the product has been to fly from the East Coast to the west Coast, and then put in a tank for a few days, then re-packed and airfreighted to Hong Kong. Therefore, buyers are paying for double airfreight and handling charges. However, if Canadian suppliers could handle the shipments more carefully and efficiently, and can guarantee the mortality rate, shipments can be done directly from the East Coast to Hong Kong, with more competitive prices. Current prices are favourable and are able to compete with lobsters from Australia and New Zealand. It would be preferable if supplies can be available all year round, to enable importers to place orders on a more regular basis.

To establish a successful local presence for lobster and lobster products depends on many factors, including nutritional value, seasonal delicacies, suitability to local palates and successful sales and marketing strategies. Hong Kong is extremely competitive and Canadian suppliers must flexible in response to market needs. Packaging may have to be slightly modified, or prices discounted, to respond to consumer preferences. Canadian exporters should contact Hong Kong importers with offers quoting C.I.F., or cost and freight Hong Kong prices in either Canadian or U.S. currency. Offers should be accompanied by specimen labels, and illustrated catalogues or samples for all packaged items.

IMPORTERS/USERS

Dah Chong Hong Limited
12/F, Hang Seng Building
77 Des Voeux Road C.
Central Hong Kong
Contact: Mr. H.F. Chu
Tel: 523-7271
Fax: 845-0222

John D. Hutchison Trading Ltd.
2 On Ping Street, Siu Lek Yuen
Shatin, New Territories
Contact: Daniel Leung
Tel: 635-5555
Fax: 637-5642

Oliver's Delicatessen
33/F, Windsor House
311 Gloucester Road
Causeway Bay, Hong Kong
Contact: Alexis Gavriloff
Tel: 576-8077
Fax: 577-0420

Sun Wah Marine Products Co. Ltd.
215-239 Wu Shan Road
Tuen Mun, New Territories
Contact: Mr. Fung Man To
Tel: 468-8848/99
Fax: 456-3054/2030

Eurosia Holdings Limited
Rooms 1101-3, 11/F, 54 Hillwood Rd.
The Leader Commercial Building
Tsimshatsui, Kowloon
Contact: Peter Lee
Tel: 366-9309
Fax: 721-5021

Lucullus Food & Wines Co. Ltd.
9 Wang Kwong Road
Kowloon Bay, Kowloon
Contact: John Tai
Tel: 798-1288
Fax: 796-0622

Hai Sang Hong Marine Foodstuffs
G/F, Singga Commercial Centre
149 Connaught Road West
Western District, Hong Kong
Contact: Mr. So Kit Hoi
Tel: 547-8171
Fax: 858-2575

Kamtex International Limited
17/F, 88 Lockhart Road
Wanchai, Hong Kong
Contact: Mr. K.Y. Lam
Tel: 529-3918
Fax: 865-3433

Friesland Foods Limited
17/F, Shun Tak Centre
200 Connaught Road C.
Central Hong Kong
Contact: Mr. E.A. Smulders
Tel: 547-6226
Fax: 858-3093

Mingson Industries Limited
G/F, Kwai Tak Ind. Centre, Block 1
Kwai Chung, New Territories
Contact: Andrew Lee
Tel: 428-1481/1121
Fax: 480-4466

Silco International Limited
Unit B, 4/F, Freder Centre
3 Mok Cheong Street
Tokwawan, Kowloon
Contact: Bernard Hofstein
Tel: 764-3632/44
Fax: 764-0209/334-4429

For Further Information Contact:
Commission for Canada
Officer: Chris Li
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Hong Kong, Hong Kong
Tel:(011-852) 847-7414
Fax:(011-852) 847-7441/810-6736

INDONESIA

SUPPLY & CONSUMPTION

Most lobster in the Indonesian market is from Australia, New Zealand, USA, Hong Kong and Taiwan. Import statistics for 1991 were: H.S.0306.11 (261 kilos); 0306.12 (4272 kilos); 0306..21.9 (106 kilos); and 0306.22.9 (501 kilos). In 1991, 4.2 tons of lobster entered the market through Batam Island for which the Post cannot trace the country of origin. Lobsters are only consumed in five star hotels, certain restaurants and on special occasions, mainly by expatriates and some within the high society. Indonesia produces its own native river lobster which is smaller in size and more affordable.

PHYTOSANITARY REGULATIONS

Imported food products entering Indonesia must be registered with the Dept. of Health. The Directorate of Pharmacy, Department of Health will analyze the products to determine the microbiological standards, ingredients, additives etc., and will require various steps which the importer must follow.

TARIFFS/NTB'S

The tariff structure for lobster products entering Indonesia is as follows: H.S.0306.11 (20% duty); 0306.12 (30% duty); 0306.21 (20% duty and 10% V.A.T.); 0306.21.1 (30% duty); 0306.22 (20% duty and 10% V.A.T.); and 0306.22.1 (30% duty).

The languages used on the label should be either Bahasa Indonesian, or English. The size of the lettering must be sufficiently large enough to be easily readable. The names and addresses of the producer/distributor or licensee should be included on the label. The word Halal is required for fisheries products. According to the joint decree of the Minister of religion and the Minister of Health, No.427/1985, "Halal" food is defined as any kind of food not containing forbidden elements and processed according to the Muslim religion laws. The word Halal should be written on the package to guarantee that Muslims are allowed to consume the product. Halal food manufacturers who put the word "Halal" on the package are responsible for the substance and process of products and required to report to the Ministry of Health describing the processing and composition of the materials used.

PROMOTIONAL ACTIVITIES

An appropriate trade show for lobster products held in Indonesia is the Food and Hotel Indonesia Show, an international hotel, catering, equipment and food exhibition held in February.

POST COMMENTS

A small amount of Canadian lobster was imported by Indonesia in the past, most likely through the United States. The Post does not foresee the possibility of exporting Canadian lobster to Indonesia in container form because demand in the market is so small.

IMPORTERS/USERS

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Contact: Ms. Elizabeth Liman
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Jl. Gatot Subroto 177
Level IV-Jakarta 12870
Contact: Steve Sondakh
Tel:(62-021) 829-8745

For Further Information Contact:
Canadian Embassy
Officer: Tommy Ruslim
P.O. Box 1052/JKT
Jakarta 10110, Republic of Indonesia
Tel:(011-62-21) 510-709
Fax:(011-62-21) 571-2251

INDONESIA

SUPPLY & CONSUMPTION

Most lobster in the Indonesian market is from Australia, New Zealand, USA, Hong Kong and Taiwan. Import statistics for 1994 were, 0306.11 (23 kilos), 0306.21 (4378 kilos), 0306.22.1 (128 kilos), and 0306.22.9 (2911 kilos). In 1994, 8 tonnes of lobsters reached the market through Bali, in which the Post cannot trace the country of origin. Lobsters are only consumed in the star hotels, dining restaurants and on special occasions, mainly by expatriates and some within the high society. Indonesia produces its own native river lobster which is smaller in size and [illegible].

PHYTOSANITARY REGULATIONS

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IMPORTERS/USERS

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Contact: Ms. Elizabeth Lindt
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Pt Mars Sarana Purnama
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Level IV-Jakarta 12870
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For Further Information Contact:
Canadian Embassy
Officer: Tommy [illegible]
P.O. Box 1052/JKT
Jakarta 10110, Republic of Indonesia
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JAPAN

SUPPLY AND CONSUMPTION

The Japanese market for homard and spiny lobster totals almost 20,000 MT per year, about 15,000 MT of that frozen. Detailed statistics on imports are attached. As can be seen in the statistics, the Japanese market for lobster is large and growing, especially for homard lobster (*Homarus Americanus*). While warm water, or spiny, lobster, holds the majority of the Japanese market, 85% of the market for frozen lobster and 61% of the market for live fresh or chilled lobster in 1991, the figures were 87.3 % and 63% in 1988. This indicates a slow erosion of spiny lobster's predominance in the Japanese market. Japanese domestic production of spiny lobster is about 1100 MT per year. However, this product commands a premium price, and cannot be compared to either of the imported types of lobster.

Imports of homard lobster began in earnest in 1985, following both the strengthening of the yen, and a decline in supplies of spiny lobster. The spiny lobster resource seems to have recovered, but homard lobster now has a strong foothold in the Japanese market, and exports continue to grow.

Canada is by far the largest exporter of homard lobster to Japan, with the US coming second and slipping. Canadian exports of homard lobster have grown substantially in the past five years. Export volumes for live lobster have risen 78% since 1987, while frozen lobster exports have risen 351% in the same period. The growth in exports of both live and frozen lobster slowed in 1992 with the economic slowdown in Japan, but there is still plenty of room for further sales growth in the Japanese market.

The vast majority of lobster is sold to the food service sector in Japan, with household consumption accounting for less than 5% of the total. Lobster is used in many wedding and banquet halls for special occasions, and in many high class Western-style restaurants, while its use has also grown among family type restaurants. Red Lobster is one of the largest users of homard lobster, and this chain's large number of outlets, and customers, has doubtlessly aided the increase in consumption of homard lobster.

Spiny lobster commands a premium price in Japan as compared to homard lobster due to its perceived superior taste. Retail prices are in the range of ¥10,000-12,000 for domestic live spiny lobster, ¥5,500-7,000 for imported spiny lobster, and ¥3200-3400 for live homard lobster. Average import prices are shown in the statistics attached. One point that should be noted is that lobster prices rise sharply in the year-end/New Year's season. Many buyers in the seafood industry believe that homard lobster's biggest advantage is its low price, and that it stops being competitive if it rises above 50% of the price of spiny lobster.

Not only is live spiny lobster considered to be superior in taste, but frozen spiny lobster is frozen fresh, rather than cooked, which is preferred by many chefs, whereas most frozen Canadian lobster is exported cooked. Buyers believe that the meat from frozen lobsters is less firm and has less taste. Several Canadian exporters have begun to export uncooked "green" frozen lobster to Japan. However, this reduces the "shelf life" of the product.

Live homard lobster is usually served in the 400-450 gram size, although some are sold in the 300-350 gram size. Frozen lobsters are often served in a half size, with the whole lobster weighing about 300-350 grams. However, there is also demand for lobsters 200-300 grams and 400-450 grams. Overall, serving sizes tend to be smaller in Japan than in Canada.

Most homard lobster is served in a limited number of ways, quasi-Western style. Menu items often include lobster thermidor, lobster with sauce, or lobster salad. Many chefs and consumers do not have the information to prepare lobster in other styles. Spiny lobster is sometimes eaten in raw (sashimi) style, but that has not been done with homard lobster. One point of interest is that Japanese consumers like the "brown matter" in lobsters, which is sometimes removed in Canada before freezing and packaging.

Some Canadian exporters have begun to produce frozen bulk packages of lobster meat for the food service industry. While it is not yet clear whether this product has been well accepted by the Japanese market, it is likely to be a good long term opportunity, as the labour shortage continues to increase demand for labour saving inputs to the food service sector.

Appearance is very important in Japan. Whole lobster should be undamaged, with a good red colour when cooked. Canadian lobster is considered to be a better, and more consistent red than US lobsters. Claws should be not noticeably different in size, and never damaged.

While the retail market for lobster is very small so far, it will be difficult to expand it with the packaging currently used by most exporters, ie. the "popsicle pack". Importers, wholesalers and retailers comment that this packaging is often unattractive, the brine freezes and conceals the lobster inside, and the graphics used are often not attractive to Japanese consumers. Many Canadian exporters are aware of these problems, and have been working hard to improve the appearance of the frozen product. Many exporters have found that the best way to improve their packaging and product acceptability in the Japanese market is to work closely with their Japanese importer who is close to the market and its demands.

It is difficult to identify competing products aside from spiny lobster. However, homard lobster is slowly creating its own niche as consumers become more familiar with it. The US is our only real competitor in the supply of homard lobster in Japan. US lobsters are considered by trade people to be less consistent in supply and quality, and their shells sometimes turn more black than red after cooking. As well, the amount of meat in the shells is less consistent. However, most consumers would not necessarily know the difference between American and Canadian quality, as some restaurants use the expression "Maine Lobster" on their menus, even when all the product served is Canadian.

Lobster consumption is quite seasonal with a large amount of lobster, both spiny and homard, consumed during the New Year period, reportedly about 2.5 times as much as in usual months. January and February are usually below average for consumption, while the balance of the year is fairly steady.

DISTRIBUTION CHANNELS

There are a large number of Japanese importers of lobster, as may be seen in the list of importers attached. While some are quite large companies, a number are small to medium-sized firms, specialized in lobster and a few other fisheries products. Virtually all imports are purchased by importing firms who sell them on to wholesalers or large chains, and then on to retailers. An insignificant amount of lobster is sold through the fisheries products auction markets in Japan, the best known of which is Tsukiji Market in Tokyo. The large tanks and other equipment needed to keep live lobsters alive limits the number of firms which can handle this product. Most restaurants, banquet and wedding halls receive frequent deliveries of lobster due to its perishability and the risks associated with holding it themselves.

It is important to note that consumption of homard lobster is largely centred on the major urban areas of Tokyo and Osaka so far. In fact one of the largest importers of lobster in Japan is located in Osaka, and the Osaka region is an important region for shellfish consumption as a whole.

PHYTOSANITARY REGULATIONS

There are no significant regulations relating to the import of live or frozen lobster. Under the Japanese Food Sanitation Law, potassium polyphosphate and sodium polyphosphate can be used without restriction. Exporters wishing to export processed lobster products, or new types of frozen lobster, should contact the Embassy in Tokyo to investigate whether certain additives are allowed under the Japanese food laws.

TARIFFS/NTB'S

There are no barriers to entry in the Japanese market for lobster. Both spiny and homard lobster are subject to tariffs of 4% of the C.I.F. value for both live and frozen lobster, while processed lobster products are assessed at a rate of 6% on the C.I.F. value.

PROMOTIONAL ACTIVITIES

In 1991, the Canadian Atlantic Lobster Promotion Association (CALPA) produced a number of attractive promotional items for the Japanese market. These include posters and table tents for the restaurant trade. This was followed by a product display and reception at the new Canadian Embassy building in Tokyo. This event attracted a lot of attention from the Japanese food media, and from chefs and other food service personnel. While these materials are very good, and are used regularly for Canada Food Fairs and similar events, follow up is needed.

One Japanese importer held a very successful seminar at the Embassy in Tokyo where chefs and other personnel from the food service industry were advised on the Canadian resource situation, handling and preparation of lobster. A similar event would provide much needed information to the food service sector in Japan. There is also a definite need for more recipes prepared for both the food service sector and consumers to expand the awareness of Canadian homard lobster and increase the number of ways that Japanese can serve the product.

Ideally a three to five year plan should be prepared to educate Japanese trade and consumers, including seminars and taste-testings in both Tokyo and Osaka. It should be possible to promote sales of Canadian lobster in Japan through a well thought out program of information and promotions at not too high a cost. In addition to activities in Tokyo and Osaka, other events could be held in our new offices in Fukuoka and Nagoya. More promotional materials are needed to promote the image of Canadian lobster.

The first Tokyo International Seafood Show, to be held in June 1993 would be an ideal location for the Canadian industry to promote the quality and taste of Canadian lobster. This could be followed up by participation in shows planned in Osaka, and either Fukuoka or Nagoya which will follow the Seafood Show in Tokyo.

The Canadian Embassy in Tokyo and the Osaka Consulate General will continue to provide regular reports on the status of the Japanese market for lobster, as well as ad hoc reports as warranted. Any exporter looking for further information on the opportunities for exports of lobster to Japan is encouraged to contact the Japan Trade Development Division of External Affairs and International Trade

Canada, or the Trade Offices in Japan for further details. In particular, those exporters wishing to sell new product types of frozen lobster, or processed lobster products, should contact the Embassy in Tokyo to ensure that their products meet Japanese food regulations.

POST COMMENTS

Canada has a very positive image in Japan as a land of wide open spaces with clean air and water. This image is a definite advantage when associated with food products. Canadian seafood as a whole has a very good image among trade people and consumers, and Canadian lobster is well respected by importers and wholesalers. Canadian lobster is inexpensive in comparison with spiny lobster, and is therefore more accessible to a larger proportion of the Japanese population.

After several years of rapidly growing sales, homard lobster has developed a definite niche for itself in the Japanese market, and more and more chefs are becoming aware of the advantages of using Canadian lobster. Canadian lobster is considered to provide a stable supply, which is very important in Japan. Restaurants do not like to have to change their menus often, and prefer to keep items on the menu for up to two years. Canadian lobsters turn a deep red when cooked, which is very positive for Japanese consumers, who associate red-coloured seafood products with high cost and good taste. Younger consumers, in particular, are increasing their consumption of homard lobster.

Homard lobster is generally not well known among Japanese consumers, and sales penetration at the retail level has been minimal, in addition, many people do not know that they are eating Canadian lobster rather than American lobster. Chefs and consumers do not know a lot of ways to prepare Canadian lobster, and do not eat it sashimi style (raw). Spiny lobster is considered to be better tasting than homard lobster, and commands a much higher price. A rule of thumb used in the trade is that if homard lobster costs more than 50% of spiny lobster, consumers will consider it too expensive. Japanese consumers are faced with a huge range of seafood products, and it is difficult to make a product stand out. Live lobster is considered difficult to handle, and only a limited number of companies will hold it. Frozen lobster is easier to handle, but importers and users have commented that the packaging is sometimes poor and the consistency of product is not always good, ie. sizes are mixed together and claws are damaged or of different sizes.

The Japanese market for lobster is large and growing, offering many opportunities for Canadian exporters. There is so far limited consumer awareness of Canadian lobster, and recipes and other handling information are needed to encourage greater consumption. Frozen lobster exports have been growing quickly, and further large growth is expected. In particular, the growth of the Japanese food service sector, the increasing affluence of Japanese consumers, and the growing labour shortage will encourage the use of lobster, particularly partly-prepared lobster.

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Contact: Marine Dept. No.2
Tel:(03) 3798-0841
Fax:(03) 3798-0845

Bennys Limited
36-1 Mikotoji
Sakai City, Osaka
Tel:(0722) 94-9650
Fax:(0722) 93-3302

C.I. Seafoods Limited
Tsukiji First Building
4-3-7 Tsukiji
Chuo-ku, Tokyo 104
Tel:(03) 3542-2383
Fax:(03) 3542-2539

Cornel Japan Company Ltd.
3-21-13 Nishiogi-Kita
Suginami-ku, Tokyo
Tel:(03) 3394-6031
Fax:(03) 3397-5523

Delica Tsukabayashi
39-21 Takeda Okenoi-cho
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Fax:(075) 602-4389

Ebijyo & Company Limited
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Ebiko Corporation
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Ebino Daimaru Company Ltd.
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Hanwa Company Ltd. Tokyo
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Happy World Inc.
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Hoko Fishing Company Ltd.
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Hoxan Corporation
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Japan Orchid Fishery Corporation
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Diamond Seafoods Company Ltd.
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Kasho Company Ltd. Tokyo
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Kyokuyo Company Limited
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Malico International Limited
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Maple Foods Company Ltd.
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Mitsubishi Corporation
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Mitsui & Company Limited
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New Toyo Sea Foods Co. Ltd.
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Nichirei Corporation
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Okaya & Company Limited
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Shoko Company Limited
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Nissho Iwai Corporation
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Fax:(03) 3588-3777

Nozaki & Company Limited
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Chuo-ku, Tokyo 104
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Fax:(03) 3545-2006

Shinyei Kaisha
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Tel:(078) 392-6865
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Suzuki Shoten Company Ltd.
101-102 Edoco
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Tonichi Company Limited
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MALAYSIA

SUPPLY & CONSUMPTION

The Malaysian market for lobster is small but growing, largely due to increases in disposable income and a growing affluence in society. The demand for lobster is seasonal and usually high during the festive seasons. Most lobster products imported are used by the major hotels and family restaurants whose clients are mainly from the middle and upper classes. In general, lobsters are preferred in the following forms: 1) cooked and frozen by retail and family restaurants; and 2) live for use in the foodservice sectors (grill rooms).

Malaysia does have local production of lobsters which are generally cheaper than imported product. Wholesale prices for lobster as of December 1992 were as follows: Cdn$30-35 per kilo for cooked and frozen; and Cdn$45-50 per kilo for live. Import statistics for lobster products from January-August 1992 were as follows: H.S.0306.12 (24.55 tonnes); 0306.21.11 (.29 tonnes); 0306.21.19 (.60 tonnes); 0306.21.9 (10.34 tonnes); 0306.22.19 (1.43 tonnes); 0306.22.9 (63.45 tonnes); 1605.30.1 (1.72 tonnes); and 1605.30.9 (7500.57 tonnes). Canada exports only two forms of lobster under the H.S. Codes 0306.12 and 0306.22.9. The major suppliers of lobster to the Malaysian market are Australia, the United States, Thailand, Japan and New Zealand.

DISTRIBUTION SYSTEMS

Potential lies mainly in the wholesale sector, largely because it caters to major hotels and restaurants. In addition, most importers prefer to deal with the cooked and frozen products rather than live, due to the high risk because of high mortality rates.

PHYTOSANITARY REGULATIONS

There are no special health certificates or inspection procedures which apply to lobster imports. The normal certificate of origin and certificate from Fisheries and Oceans Canada are essential.

TARIFFS/NTB'S

All lobster products enter Malaysia duty free except for the following: H.S.0306.21.11 (40% duty and 5% sales tax); and 0306.22.11 (40% duty and 5% sales tax).

PROMOTIONAL ACTIVITIES

The Post does not recommend a lobster mission to Malaysia in view of the present small market. Nevertheless, to create a greater interest and awareness of Canadian lobster products, the Post recommends that lobster products should be included in the next Canadian food promotion (currently in planning stages). Another option would be for the Post, or other relevant organizations (private or public), to co-sponsor regular lobster fairs with major local importers on an annual basis.

POST COMMENTS

Canadian lobsters are reported to be of better quality and better taste compared to current suppliers. By capitalizing on these two qualities, supported by adequate promotion and proper marketing strategies, the demand for more Canadian lobsters looks promising. Ultimately, Canadian lobsters will be competitively priced as per unit cost will be reduced with larger volumes. On the other hand, a primary weakness is that Canadian lobsters are reported to be expensive partly due to high freight charges and small quantities involved. In general, main competition for imported lobsters are locally produced product and tiger prawns which are slightly cheaper and fresher.

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Pacific Shore Finefood Sdn Bhd
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Blue Pacific Enterprise
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Pok Brothers Sdn Bhd
12 Jalan Tukul 16/5
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Tel:(03) 550-5030
Fax:(03) 550-5680

Cold Storage Trading Sdn Bhd
12th Floor, Komplek Kewangan
82 Jalan Raja Chulan
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Tel:(03) 261-2177
Fax:(03) 261-9802

The Malayan Refrigerating Co. S.B.
Lot 1050, Jalan Dua
Selayang Baru
68100 Batu Caves, Selangor
Tel:(03) 618-8040
Fax:(03) 618-9533

SINGAPORE

SUPPLY & CONSUMPTION

Total imports of crustaceans to the Singapore market in 1991 were 3342 metric tons, of which it is estimated that 5-8 tons were lobsters. Lobsters are considered a delicacy in Singapore and are generally consumed during festive occasions or celebrations. Lobster is usually not consumed in individual households, but rather are available in restaurants, hotels and catering establishments. The most preferred form for import are live lobsters, which are then cooked fresh for the customer. To a lesser extent, frozen lobsters are also popular with hotels which frequently prepare various seafood buffets. The main competition in the market comes from lobsters and crayfish that are caught in and around the region, from countries like Malaysia, Bangladesh, India, Sri Lanka and also rock lobsters from Australia. Some local importers have recently began to import lobsters from Boston and Maine, however, it is unknown whether these lobsters are of Canadian origin.

DISTRIBUTION SYSTEMS

Lobsters are distributed mainly through seafood wholesalers and importers who service the institutional market which includes the hotels, restaurants and catering establishments. Lobsters are not generally popular in the retail sectors, and only a handful of retail stores actually carry lobster products. As live lobsters are the most popular, most of the major seafood distributors have facilities available to store the live seafood products they import.

PHYTOSANITARY REGULATIONS

The usual requirements apply for all seafood imports into Singapore, a certificate of origin and a copy of the invoice together with a standard health certificate are required by the Singapore authorities. Random checks on seafood items are conducted by the local health authorities.

TARIFFS/NTB'S

There are no applicable tariffs or quotas for all seafood imports into Singapore, and lobsters are allowed entry duty free.

PROMOTIONAL ACTIVITIES

There is not enough knowledge of the availability of Canadian lobsters in the Singapore marketplace, and the market currently still prefers the local species of lobster. Ideally, Canadian lobster exporters should work with local importers to organize lobster promotion events in the market, and try to create an increased awareness of the product. Coordinating focused promotions in the key institutional outlets, highlighting Canadian lobsters, would be an effective method of gradually creating a wider acceptance for the use of Canadian lobster products.

POST COMMENTS

Canadian strengths lie mainly in the image and reputation of Canadian products. Generally, Canadian lobsters are perceived to be of higher quality than the other sources. The main weaknesses of Canadian lobsters lie in the higher prices which makes it more difficult to compete in the local market. There also appears to be a lack of commitment and flexibility on the part of Canadian exporters to dedicate and invest the time and resources required to penetrate this market. With the proper promotional strategy, the Embassy is confident that awareness and demand for Canadian lobsters can be further increased in the near future.

IMPORTERS/USERS

Euraco Finefood Pte Ltd.
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Pasir Panjang Wholesale Centre
Singapore 0511
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Fax:(65) 779-0730

Tenneco Pte Limited
121 Defu Lane 10
Singapore 1953
Contact: Tan Hai Yong
Tel:(65) 743-4711
Fax:(65) 743-8837

Seafood Distributors (S) 1989 Pte Ltd.
48 Hillview Building
Singapore 2366
Contact: Raymond Loh
Tel:(65) 760-2376
Fax:(65) 760-0853

For Further Information Contact:
Canadian High Commission
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Robinson Road P.O. Box 845
Singapore 9016, Republic of Singapore
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Tan Yong Joo Aquatic Product Import and Export
No. 18 Carpenter Street
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Fax:(65) 285-1521

SOUTH KOREA

SUPPLY & CONSUMPTION

Frozen lobsters are used mainly in hotel buffets and in up-scale Japanese restaurants, especially Tepa-Nya-Ki seafood restaurants. Fresh lobsters and rock lobsters are consumed principally in raw form (sashimi) in the more affluent households. Lobsters are generally shelled during preparation so that they can easily be picked up with chopsticks. Lobster is an essential ingredient, along with locally cultured shrimps and prawns, in the Tepa-Nya-Ki restaurants. As of December 1992, the import price of lobsters is US$7.90 per pound C.I.F., subject to a 5% mortality rate. Import statistics for the half-year ending June 1992 are as follows: 0306.11 (8626 kilos valued at US$226,245); 0306.12 (34,640 kilos valued at US$873,210); 0306.21 (6341 kilos valued at US$173,031); and 0306.22 (17,580 kilos valued at US$343,780). Local sources have estimated that there would be approximately 150 tonnes of frozen and live lobster imported during the last half of 1992.

DISTRIBUTION SYSTEMS

The rapid modernization which has taken place in most facets of the Korean economy has not been matched in the distribution systems for agri-food and fisheries products. In particular, the traditional pattern of distribution, with goods passing down from large to smaller wholesalers, contributes to the current situation in which South Koreans pay very high prices for food, relative to incomes. The South Korean distribution system comprises of wholesale markets, open-air markets, department stores, supermarkets, chain stores and convenience stores. The path of distribution for imported seafood products is generally as follows: suppliers and their trading agents/importers/wholesalers (often more than one stage), then down to retailers, restaurants and consumers.

PHYTOSANITARY REGULATIONS

There is no specific protocol covering the importation of lobster from Canada. To date, imports have been accompanies by a standard certificate issued by Fisheries and Oceans Canada which states that the lobsters concerned have been taken from Canadian waters, and that mercury and lead levels are below 0.5ppm and 0.02mg per kilo on a wet tissue basis. The document must also certify that the lobsters concerned are free of antibiotics (eg. oxytetracycline).

TARIFFS/NTB'S

Imports of live, chilled or frozen lobster are not subject to quantitative restrictions. The customs duty on lobster is 20% of C.I.F. value, and there is a V.A.T. of 10% of duty paid value applied.

PROMOTIONAL ACTIVITIES

Although trade promotional activity will be necessary in order to create a greater awareness of Canadian lobster in the South Korean market, this need not involve expensive print and electronic media. Point of sale (POP) promotions with Korean language POP material (including brochures), along with taste promotions in selected hotels, would be an appropriate level of commitment. To be effective, these initiatives should be undertaken in cooperation with well placed importers and distributors. *Experience Canada '93* (held in the second week of March 1993), is a major trade promotional event for the coming year to be organized by the Post. This type of event provides an excellent opportunity for the Canadian lobster trade to gain a high profile in the South Korean market. Another option would be to participate in a specialty trade fair such as Seoul Food, which is held each April under the auspices of the Korean Trade Promotion Corporation (KOTRA), or the annual chain store trade fair.

POST COMMENTS

It is not necessary to retain a South Korean agent in the lobster trade. Canadian suppliers should deal directly with importers and distributors, as each importer will be concerned with the need to develop the Korean lobster market. Canadian exporters should approach several Korean firms initially, with a view to making some trial shipments before considering entering into an exclusive distribution arrangement.

The growth of an affluent middle class in South Korea has recently led to a burgeoning market for some seafood products, including lobsters. The Korean market can support high prices for products that are perceived as being of premium quality. This market would be worth exploring for Canadian lobster exporters that are willing to commit at least modest resources to market development in cooperation with South Korean importers and distributors.

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THAILAND

SUPPLY & CONSUMPTION

There is local production of lobster (Phuket lobster) with the catch area centred in and around the Andaman Sea. There is no local catch data available, but according to local sources, production is rather small and the market size also limited. The only available import statistics are for 1990, which show very small amounts of H.S.0306.12 (37,996 kilos), and 0306.22 (115 kilos).

DISTRIBUTION SYSTEMS

Imported lobster products are distributed in Thailand through importers and wholesalers to retail supermarkets and the hotel trade.

PHYTOSANITARY REGULATIONS

All food products imported into Thailand must get approval from the Thailand Food and Drug Administration. In addition, health and phytosanitary certificates must accompany the shipment.

PROMOTIONAL ACTIVITIES

The very small size of the market for lobsters does not justify an special promotional activities.

POST COMMENTS

The necessity for fresh product, the close proximity to Vietnam as a source, high transportation costs from Canada, and the limited size of the market for lobsters, make it difficult for Thailand importers to source from Canada.

IMPORTERS/USERS

Siam Food Services
2439 Old Paknam Railway Road
Bangkok 10110
Contact: Ron Armstrong
Tel:(662) 249-1501
Fax:(662) 249-7294

Vita Fresh Vitapac Co. Ltd.
302/93-95 Taveemitr Hacienda
Asoke-Din Daeng Road, Bangkok 10310
Contact: Barry Quatermain
Tel:(662) 245-5311
Fax:(662) 247-1865

Choice Food (Thailand) Co. Ltd.
595/10-11 Soi 33/1 Sukhumvit Road
Near Villa Cinema, Bangkok 10110
Contact: Robert Coomber
Tel:(662) 258-0705
Fax:(662) 258-5090

For Further Information Contact:
Canadian Embassy
Officer: Thawee Thaiprasithiporn
P.O. Box 2090
Bangkok 10500
Kingdom of Thailand
Tel:(011-66-2) 237-4126
Fax:(011-66-2) 236-6463/7119

LATIN/SOUTH AMERICA

ARGENTINA

SUPPLY & CONSUMPTION

There is no domestic supply of lobster in Argentina, therefore all local demand is supplied through imports. Argentines are traditionally marginal consumers of fishery products and lobster consumption is extremely low. The main users of lobster products are up-scale restaurants and specialized high quality fishery retail outlets. Lobster is imported both live and frozen, mainly from Chile, Ecuador, Brazil and the United States, however, quantities are minimal and imports are not on a regular basis. It is estimated that less than one tonne of lobster is imported per month, with 900 pounds of this consumed in Buenos Aires and surrounding suburbs. Consumption has been relatively stable over the years except for the high inflation periods (1989/90) when imports were almost stopped. Retail prices are very high and range from a low of US$35.00 per kilo to US$60.00 per kilo, with prices even higher in restaurants.

DISTRIBUTION SYSTEMS

Both frozen and live lobsters are imported by 2-3 specialized importers of fishery products, who distribute the product directly to retail outlets and consumers. The importers decide the origin of the product based on price rather than quality. There is no general awareness of quality standards for lobster, and people who consume lobster consider it a status symbol rather than a specialty food item.

PHYTOSANITARY REGULATIONS

Lobster can be imported under a normal health certificate which is standard for fishery products entering Argentina.

TARIFFS/NTB'S

Because there is no local production, lobster is imported with a tariff structure of 50% C.I.F. Buenos Aires, plus a 180% V.A.T.

PROMOTIONAL ACTIVITIES

Low consumption and low export potential to Argentina does not allow for any significant promotional activities.

IMPORTERS/USERS

Frozen Fish S.A.
California 1364
1289 Buenos Aires
Contact: Gustavo R. Pierini
Tel:(54) 128-8604
Fax:(54) 121-8148

Alimentos Internacionales Limited
H. Yrigoyen 1991
Florida (1602) Buenos Aires
Contact: Nestor Fuertes
Tel:(54) 1795-2390

For Further Information Contact:
Canadian Embassy
Officer: G.L.B. Perkins
Casilla de Correo 3898
1000 Buenos Aires, Argentina
Tel:(011-54-1) 805-3032
Fax:(011-54-1) 806-1209

BRAZIL

SUPPLY & CONSUMPTION

Brazil is a major exporter of lobster products (specifically rock lobster) as a result of its long sea coastline and sea boundary. Figures for 1991 and 1992 indicate that lobster imports vanished during this period, whereas Brazilian exports for frozen lobster reached 4363 tons in 1991, and 1082 tons in 1992.

For Further Information Contact:
Canadian Embassy
Caixa Postal 00961
Brasilia-DF 70359-970
Federative Republic of Brazil
Tel:(011-55-61) 321-2171
Fax:(011-55-61) 321-4529

COSTA RICA

SUPPLY & CONSUMPTION

The five countries in the Post's area (Costa Rica, El Salvador, Honduras, Nicaragua, Panama) do not import any lobster products. Ten percent of local production covers all the local market requirements and the balance is exported to world markets in shell live and frozen.

For Further Information Contact:

Canadian Embassy
Officer: Manuel Ruiz
Apartado Postal 10303-1000
San José, Republic of Costa Rica
Tel:(011-506) 55-35-22
Fax:(011-506) 23-23-95

CUBA

SUPPLY & CONSUMPTION

Exports of lobster tails (H.S.0306.11) represents one of the principal sources of foreign exchange earnings for Cuba. Consequently, the Cuban government does not encourage imports of any type of lobster or lobster products. Lobster is not available to the local population as virtually all production is exported with a minimum quantity sold at hard currency stores for consumption by foreign tourists and diplomats, as well as in dollar restaurants that cater to foreign residents and international tourists. Due to a shortage of local lobster, the production of which was totally committed to export markets, the Embassy in Havana understands that Cuba imported a small quantity of Canadian lobster destined for tourist consumption. However, this quantity did not appear in Canadian export statistics for 1991 or 1992, thus the quantity involved must have been insignificant. This purchase was reportedly conducted by the state trading agency CARIBEX and its Canadian representative Caribex Seafoods Limited. The Embassy does not believe this instance represents an ongoing opportunity for Canadian exporters. Additionally, it is difficult to forecast whether the situation will arise again in 1993, as it is extremely dependent on Cuba's ability to meet the demand generated by this segment of the market.

POST COMMENTS

Since local requirements for ad hoc imports of lobster are very small and unpredictable, and given local knowledge of Canadian fish industry, the Post would recommend that Canadian exporters do not plan any specific export strategy for Cuba, including attendance at local trade shows. If required, Cubans will instruct Caribex Seafood Limited to source from Canada. Perhaps the most economical and effective manner of promoting sales of Canadian lobster to Cuba, is for Canadian exporters to contact Caribex Seafoods Limited in Toronto to express their interest in exporting to Cuba if and when additional product is needed.

IMPORTERS/USERS

Caribex Seafoods Limited
350-650 Wilson Avenue
Downsview, Toronto M3K 1Z3
Tel:(416) 630-6172
Fax:(416) 630-6165

For Further Information Contact:
Canadian Embassy
Calle 30 No. 518 Esquina a7a
Avenida, Mirimar
Havana, Republic of Cuba
Tel:(011-53-7) 33-2516/17/27
Fax:(011-53-7) 33-2044

JAMAICA

SUPPLY & CONSUMPTION

Local lobster requirements are filled through one of two channels: 1) imports primarily from Belize; and 2) local supplies from catches off the Jamaican coast. It should be noted that the island has a closed lobster season which lasts from April 1 to June 30 of each year. Strict penalties are administered to those found breaking this fishing law. Competition, therefore, during the off-season comes from other seafood products such as fish, crabs, shrimps, conch and scallops.

Imports of lobster to Jamaica in 1991 totalled 2682 kilos frozen and 2852 other product forms. Exports during 1991 totalled 112,448 kilos frozen and 18,509 other product forms.

DISTRIBUTION SYSTEMS

Retail stores operated by some of the major importers are the main source of distribution, although the "one-man operation" source is very prevalent as well. A substantial amount of the lobster catch is also sold at the fisherman's wharves and at the various fishing villages all over the island.

PHYTOSANITARY REGULATIONS

Very strict phytosanitary regulations are in place and a phytosanitary certificate, certifying that the lobsters are free of all diseases, must accompany the shipment. Should the certificate not be presented, Customs Authorities will seize the goods and release will not be guaranteed until presentation of this health requirement.

TARIFFS/NTB'S

Jamaica is a signatory to the Common External Tariff (CET) which is born out of CARICOM and also levies an additional 10% General Consumption Tax (GCT). At present, duties on lobster imports from third countries are set at 45%, but will be lowered to 30% plus GCT as of April 1993 in Jamaica, and January 1, 1993 throughout the rest of CARICOM.

PROMOTIONAL ACTIVITIES

The Embassy in Kingston has always maintained that the most effective means of introducing and promoting Canadian lobster to the local market, would be to host a series of lobster tasting sessions in the larger hotels and restaurants around the island. As the island is a major tourist resort, imports are geared primarily for that market and buying trends are highly swayed by quality product and marketing.

POST COMMENTS

Most Canadian products are price competitive in the local market, but are impeded by the high transportation costs. More creative ways of sending goods to this region must be found and alternatives to the normal freight channels must be explored. Where lobster is concerned, it should be noted that the island exports a substantial amount to North America and other Caribbean islands, therefore Canadian suppliers have to be price competitive in order to give themselves a chance in this very competitive market.

IMPORTERS/USERS

Grace Kennedy & Co. Ltd.
64 Harbour Street
Kingston
Contact: Willie Harrison
Tel:(809) 922-3440
Fax:(809) 922-7567

J.H.G. Mapp (Succs) Ltd.
2A East Avenue
Kingston 13
Contact: Ronnie Chin Loy
Tel:(809) 923-8846
Fax:(809) 923-5092

B-Marts Corporation Limited
46 Trinidad Terrace
Kingston 5
Contact: Richard Burgher
Tel:(809) 929-6776
Fax:(809) 929-7394

C.V.F. Lambeck Limited
94J Old Hope Road
Kingston 6
Contact: Leon Beckford
Tel:(809) 927-6792
Fax:(809) 927-6793

T. Geddes Grant (Dist.) Ltd.
109 Marcus Garvey Drive
Kingston 11
Contact: Mike Sampson
Tel:(809) 923-7117
Fax:(809) 923-7137

Chas E. Ramson Limited
449 Spanish Town Road
Kingston 11
Contact: Raymond Silvera
Tel:(809) 923-5051
Fax:(809) 923-5055

Cee Foods Limited
5 Third Street
Newport West
Kingston 11
Contact: Selvin Campbell
Tel:(809) 923-7199

For Further Information Contact:
Canadian High Commission
Officer: Yasmin M. Chong
P.O. Box 1500
Kingston 10, Jamaica W.I.
Tel:(809) 926-1500
Fax:(809) 926-1702

Facey Commodity Company Ltd.
61 Newport Boulevard
Kingston 13
Contact: Mrs. Claudette Chin
Tel:(809) 923-9221
Fax:(809) 923-9469

Mussons Jamaica Limited
178 Spanish Town Road
Kingston 11
Contact: Desmond Blades
Tel:(809) 923-8922

Fish Importers Limited
54 Church Street
Kingston
Contact: Mr. L.R. Clunies
Tel:(809) 922-4945
Fax:(809) 922-4553

MEXICO

SUPPLY & CONSUMPTION

The disposable volume of lobster in the domestic market in 1991 reached over 1683 tonnes, an increase of 98.7%, compared to a decline of 2.7% in 1990. Per capita consumption of lobster went from 11.13 kilos in 1989 to 20.33 in 1991. Direct human consumption of lobster in 1991 is estimated at approximately 10.1 kilos, while indirect human consumption reached 10.23 kilos. Lobster is distributed in the Mexican consumer market whole-boiled-frozen (67%), fresh-frozen tails (28%) and as lobster pulp (5%). Lobster is a high-priced food item, which is affordable and consumed regularly only by the upper middle class and the wealthy sectors of the population.

Recently, imported surimi products (imitation crab and lobster made from inexpensive white fish) have entered the market. They are sold over supermarket fish counters, fish stores and served mostly at Japanese restaurants. Being a new and cheaper product (the price of imported surimi is but a fraction of that of real lobster), Mexican housewives tend to be willing to try surimi for a time, but the novelty soon wears off. On the other hand, surimi consumption in specialty restaurants is on the increase, but this trend represents no serious threat to the traditional consumption of real product.

The recorded imports of frozen rock lobster and other sea crayfish (*Palinurus, spp.*, *Palunirus spp.* and/or *Jasus spp.*) totalled only 1435 kilos in 1991, compared to 16,254 kilos a year earlier. The major supplier of these products is the United States. There are major discrepancies between official Mexican statistics and Statistics Canada data, concerning Canadian lobster exports to Mexico. SECOFI import data for 1991 recorded only 322 kilos of *Homarus Americanus* lobster valued at US$4074 as originating in Canada. On the other hand, Statistics Canada indicated a total of 3055 kilos (rock lobster and other crayfish) valued at Cdn$16,000 exported to Mexico. One explanation for this is that products arriving at Mexico's northern border crossings are registered as entering from the United States.

DISTRIBUTION SYSTEMS

The new La Viga fish market in metropolitan Mexico City is the largest and most modern in Latin America. It is the major distribution centre for all fisheries products, including lobster and crayfish. "*Central de Pescados y Mariscos La Nueva Viga*" is a modern facility for wholesale and retail of fisheries products, and home of the National Society of Fish and Seafood Distributors. Product is distributed from La Viga to other urban centres in the interior where lesser facilities receive and distribute to consumer outlets. Frozen lobster (whole-boiled and tails) is available wholesale or retail at La Viga, or from a number of supermarket chain stores and fisheries product retail markets. Leading gourmet restaurants and five star tourist hotels list lobster on their menus.

The domestic lobster fishery is reserved to cooperative operations. Product from these cooperatives is sold to intermediaries who bring the lobsters to distribution points located in the large urban centres such as Mexico City, Guadalajara, Monterrey, Acapulco, León, Tijuana, etc. These intermediaries and the wholesalers control the volume, price and quality of the product. An estimated 100,000 tonnes of fisheries products move through the La Viga fish market every year, and approximately 5% corresponds to crustaceans, including domestic crayfish and lobster.

Sales of imported seafoods to Mexico are usually made through local agents or distributors, who normally operate on a commission basis. Products coming into the country move from the exporter to the local agent or distributor, then delivered to the wholesaler, supermarkets, hotels and restaurants.

Most buyers prefer to deal with a local agent or distributor who takes responsibility for_delivery and product quality, rather than taking the risks involved when purchasing directly from the foreign supplier.

PHYTOSANITARY REGULATIONS

All imported fisheries products must comply with sanitary requirements established by the Secretariat of Health, published in the Official Gazette on January 18, 1988. The law prohibits the marketing of fisheries products whose natural appearance, composition or quality have been adultered in any way; they are considered to be contaminated when they exceed the limits allowed by the Secretariat for pathogenic agents, foreign substances, antibiotic residues, hormones and toxic substances such as heavy metals, biotoxins, petroleum and hydrocarbon derivatives, insecticides, bacteriostatis and radioactive substances.

The Secretariat of Health requires that importers apply for, and obtain, an "*Autorización Sanitaria Previa de Importación*" for all food and fish products. In order to obtain such authorizations, importers must present laboratory analysis results taken in the country of origin, which certify that the product is safe for human consumption. In the case of lobsters, Fisheries and Oceans Canada is supportive of Canadian exporters who wish to ship product into the Mexican market. On the request of Canadian lobster exporters, FANDO's regional inspection Services Branch will issue certificates to enable Mexican customers to process their import applications in accordance with the rulings of the Secretariat of Health. Interested parties should contact the regional offices of Fisheries and Oceans, or Director General, Inspection and Enforcement, Fisheries and Oceans, 200 Kent Street, Ottawa, Ontario.

TARIFFS/NTB'S

As of November 13, 1992 crayfish and lobster imports do not require a permit from the Secretariat of Commerce and Industrial Development (SECOFI). Under the Harmonized System, crustaceans are described according to the following: "Crustaceans, including those that are shelled, live, fresh, chilled, frozen, dried, salted or in brine; unshelled crustaceans, boiled in water or steamed, chilled, frozen, dry, salted or in brine; meal, flour or "pellets" of crustaceans, fit for human consumption". Ad Valorem tariffs for lobster products entering Mexico currently are: 0306.11.01 (20%); 0306.12.01 (20%); 0306.21.01 (20%); 0306.22.01 (20%); and 1605.30.01 (20%).

POST COMMENTS

In recent months there has been growing interest among potential seafood importers and distributors for information on Canada's lobster industry. The Embassy in Mexico City does not believe there is merit in organizing a specific lobster trade mission to Mexico. The Embassy will participate in PESCA-Industria '93 in Ensenada, and the show can be used to further promote the Canadian lobster industry.

The recent easing of import controls for fisheries products could result in increasing future sales of Canadian lobster and crayfish into the Mexican market. It should be recognized, however, that because Mexico is one of the world's major lobster producers, significant increases to the present import levels would seem unlikely. Canadian exporters may have to be content with supplying a niche market at best. The Mexican market is highly competitive, demands good quality product, guaranteed supply and attractive prices. Canadian companies that can comply with these conditions will be able to establish a foothold in the marketplace.

IMPORTERS/USERS

Restaurant La Hacienda Ixtapalapa
Calz Ermita-Ixtapalapa No. 2000
Mexico, D.F.
Contact: Javier Olea Adame
Tel:(5) 691-6525/62

Mariscos del Golfo
Calle Nicolás Romero No. 3
Uruapan, Michoacán, Mexico
Contact: Miguel Ochoa M.
Tel:(011-52-452) 36587

Distribuidora Bahía
Calz. de la Viga No. 125-C
Col. Tránsito, 06820 Mexico D.F.
Contact: Julián A. Domínguez
Tel:(5) 764-1291
Fax:(5) 560-7701

Organización Aro, S.A. de C.V.
Av. América No. 440
Sector Hidalgo
44650 Guadalajara, Jalisco
Contact: Armando Rojas
Tel:(3) 615-5295
Fax:(3) 616-9873

El Pedregal
Av. Hidalgo Oriente #1302 A&C
50060 Toluca, Estado de Mexico
Contact: Ing. Victor Almazán de la Rosa
Tel:(72) 150-581
Fax:(72) 150-580

Productos Mar de Mexico S.A.
Calzada de la Viga #124-B32
Col. Lorenzo Boturini
15820 Mexico D.F.
Contact: Joel Morán Hernández
Tel:(5) 768-6365

REIMSA
Hidalgo #56, Col. Tlalpan
14000 Mexico D.F.
Contact: Alfonso de la Mora
Tel:(5) 655-7888/573-6332

Distribuidora Mascarell S.A. de C.V.
Hamburgo No. 85, Col. Juárez
06600 Mexico, D.F.
Contact: Ing. Federico Mascarell
Tel:(5) 514-5607
Fax:(5) 533-6777

Comercial Mexicana, S.A. de C.A.
Callejón San Antonio Abad No. 54
Col. Transito, 06820 Mexico D.F.
Contact: Miguel Aracama de la Fuente
Tel:(5) 522-7060/2938
Fax:(5) 522-6439

Comar, S.A. de C.V.
Roa Bárcenas No. 378-D
Col. Artes Gráficas
15830 Mexico D.F.
Contact: David Gonzáles Rossano
Tel:(5) 740-5739
Fax:(5) 740-7864

Comercializadora Chef, S.A.
Ricardo Castro No. 60
Col. Guadalupe Inn
01020 Mexico, D.F.
Contact: Lic. Miguel Olguín
Tel:(5) 550-9029
Fax:(5) 548-9695

Restaurantes Daruma
Río Pánuco #129, Col. Cuauhtémoc
06500 Mexico D.F.
Contact: Jorge Sugawara
Tel:(5) 208-7984/207-9622
Fax:(5) 511-8115

Aurora Juárez Martínez S.A. de C.V.
Providencia No. 1412, Edif. c-602
Col. Del Valle, 0311 Mexico D.F.
Contact: Mrs. Aurora Juárez Martínez
Tel:(5) 575-3818
Fax:(5) 559-7344

Pescadería Puerto Angel
Ernesto Pugibet No. 21-Local 89
Col. Centro
Mexico D.F.
Tel:(5) 512-8888

Comercializadora de Hotels y Rest.
Manzanillo 83, Piso 10, Col. Roma Sur
06760 Mexico, D.F.
Contact: Lic. Alberto Frías S.
Tel:(5) 264-6090
Fax:(5) 264-8958

Dee Soul, S.A. de C.V.
Montes de Oca No. 3
Col. Condesa, 06140 Mexico D.F.
Contact: Mrs. Esther Torres G.
Tel:(5) 286-0068

Cafetería Toks, S.A. de C.V.
Jaime Balmes No. 11, E.B. Piso 5
Col. Los Morales-Polanco
11510 Mexico D.F.
Contact: Victor Gómez López
Tel:(5) 393-9115/395-6211
Fax:(5) 393-7073

Restaurantes Las Brisas del Mar
Apartado Postal 13
Boca del Río
Veracruz, Mexico
Contact: José María M. Hernández
Tel:(29) 860-080/224
Fax:(29) 373-403/372-928

Gourmet Matterhorn
Poniente #152, Col. Vallejo
00720 Mexico D.F.
Contact: Francisco Trujillo Sáenz
Tel:(5) 587-6161

Grupo Industrial URBI S.A. de C.V.
Lafayette #14, Col. Anzures
11590 Mexico D.F.
Contact: Lic. Ricardo Calzada Garza
Tel:(5) 254-6000/1803/5711
Fax:(5) 255-1918

For Further Information Contact:
Canadian Embassy
Officer: J. Antonio Pahnke
Apartado Postal 105-05
11580 Mexico, Mexico
Tel:(011-525) 724-7900
Fax:(011-525) 724-7982/7984

TRINIDAD & TOBAGO

SUPPLY & CONSUMPTION

All lobster imports to the islands of Trinidad and Tobago are sourced from the Caribbean island os Grenada. Total imports of lobster in 1991 were Cdn$80,000.

For Further Information Contact:
Canadian High Commission
Officer: Anne Borde-Talma
P.O. Box 1246
Port-of-Spain
Republic of Trinidad and Tobago
Tel:(809) 623-7254
Fax:(809) 624-4016

VENEZUELA

SUPPLY & CONSUMPTION

Venezuelan lobster sector is managed by a group of small independent fishermen who catch product at sea. However, intermediate traders with transport and refrigeration facilities skim off the greater share of profits by taking lobsters to the market, thus making local supply precarious with high and unstable prices. Because of this, fresh or frozen lobsters are considered a luxury product for most Venezuelan consumers. The local lobster source is Caribbean rock lobster with a long tail, small claws, and very rich in flavour. Domestic production and consumption is approximately 2000 tons per year. There are currently no imports or exports of lobster, and there is a closed catch season of six months which runs from May 1 to October 30. The primary markets for lobster are in the metropolitan cities which possess higher purchasing power.

DISTRIBUTION SYSTEMS

The distribution system for lobster in Venezuela proceeds from fishermen to transporters, then to distributors, retailers and on to the consumer. Consumer prices are retail stores are approximately 150-180% above the prices paid to fishermen.

PHYTOSANITARY REGULATIONS

Imported lobster products require health certificates from the Health Ministry and from the Agriculture Ministry, issued by the country of origin and similar to those issued in Canada.

TARIFFS/NTB'S

Legal classification of lobster imports to Venezuela is based on the NANDINA system, with tariff code number 16.05. There is an ad valorem duty of 20%, plus an additional 1% customs service tax.

MARKET OPPORTUNITIES

Opportunities are abound in Venezuela for Canadian lobster exporters (fresh, frozen or canned), due to the significant increase in tourism and the expanding hotel and restaurant trade in the area. Moreover, Venezuela is emerging as an important trading partner with Canada and a growing tourist destination. Canada could be a significant supplier of lobsters to Venezuela during the closed catch season.

POST COMMENTS

There are some existing problems that could limit the export of lobster products from Canada including: 1) lack of Canadian lobsters available from Florida brokers; 2) lack of local knowledge regarding Canadian lobsters (prices, payment facilities, packaging, quality, distributors, brokers, etc.); and 3) lack of transportation facilities between Canada and the Venezuelan ports. Possible solutions are: 1) to establish contact with importers or agents since they are the most promising channels for imports; 2) enclose a certificate of analysis for the product with a letter of introduction to the importers; 3) use Spanish for correspondence whenever possible; 4) when samples are requested for registration, they should be promptly dispatched in a secure manner and with a certificate of analysis; and 5) shipments should conform with samples and delivery schedule on the basis the order was placed.

IMPORTERS/USERS

Ca Distribuidora de Alimentos
Avenida El Rosario, Edf Cada
Los Chorros, Caracas
Contact: Luis Regalado
Tel:(582) 238-3259
Fax:(582) 238-3635

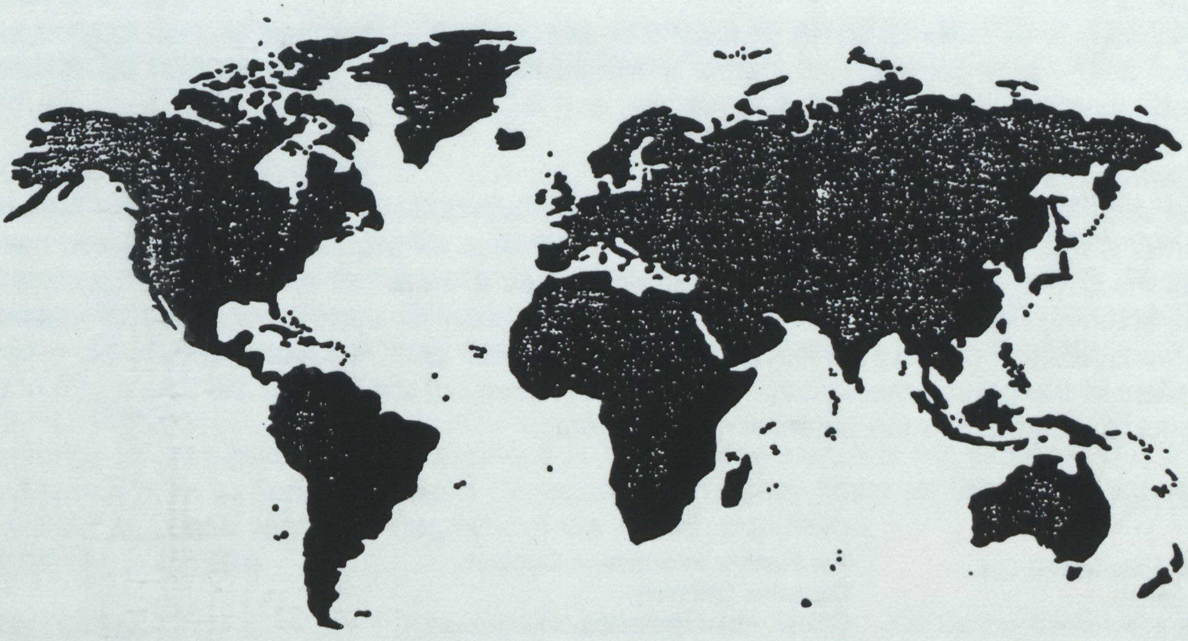
Internacional de Desarollo la Granja
Avenida la Estancia
Torre Diamen Piso 9
Chuao, Caracas
Contact: Jose Burg
Tel:(582) 92-4233
Fax:(582) 92-0076

Frigorifico Lara CA
Calle 500
Edf Hoel Perez Ofc 4
Quinta Crespo, Caracas
Contact: Salvatore Stelluto
Tel:(582) 41-1948
Fax:(582) 483-9066

For Further Information Contact:
Canadian Embassy
Officer: David Ramirez
Apartado Postal 62.302
Caracus 1060-A
Republic of Venezuela
Tel:(011-58-2) 951-6166/67/68
Fax:(011-58-2) 951-4950

Internacional de Alimentos y Del. CA
Calle 9
Edf Internacional de Alimentos
La Urbina, Caracas
Contact: Jose Pinerua
Tel:(582) 241-7475
Fax:(582) 241-9369

MIDDLE EAST



EGYPT

SUPPLY & CONSUMPTION

Lobster imports are banned from entering Egypt due to self-sufficiency, and Egypt is actually a net exporter of lobsters.

For Further Information Contact:
Canadian Embassy
Officer: Magdy E.S. Ghazal
P.O. Box 2646
Cairo, Arab Republic of Egypt
Tel:(011-20-2) 354-3110
Fax:(011-20-2) 356-3548

ISRAEL

SUPPLY & CONSUMPTION

Until recently, the import of lobsters and other shellfish was banned due to Kashrut Laws (dietary laws). The ban has now been lifted, however, imports are minimal due to the restricted market size. Lobsters cannot be sold in major supermarket chains or in local hotels. Therefore, the market for live lobsters is in select restaurants only. For processed lobster products, the local market would include deli stores. There were no imports prior to 1992, and no other statistics are available.

DISTRIBUTION SYSTEMS

A local importer takes over an exclusive arrangement. For processed products, an importer can also be the distributor. Importers have to deal with a lengthy bureaucratic process of obtaining a licence from the Ministry of Agriculture.

PHYTOSANITARY REGULATIONS

An import licence is required. The Ministry of Agriculture grants the licence conditional upon a Canadian veterinary inspection certificate and approval from the Ministry of Health. For live and processed shellfish, approval from the Ministry of Health, Food Inspection Branch, is required. A sample must be sent for laboratory inspection prior to shipment. For further shipments from the same supplier, spot checks will be performed.

TARIFFS/NTB'S

Live fresh lobsters enter Israel duty free (H.S.0306.11 and 0306.12). There is no duty on lobsters boiled in water, but a 40% duty per ton, plus 2% tax is applied to others (0306.21 and 0306.22). Processed lobster products (1605.3) face a 40% duty per kilo, and 2% tax.

POST COMMENTS

The market is minimal, with a projection that sales could reach 200 live lobsters per week. The cost to the consumer is approximately Cdn$40.00 per kilo. The market for processed lobster is also minimal. Because of the size of the market, sales would be restricted to small deli stores and restaurants only. In addition, shipping distance and prohibitive costs do not allow for substantial market development. However, live lobsters imported from Nova Scotia as of October 1992, received extensive publicity from all food writers in the printed media, largely due to the novelty of the item. In the future, promotional activities should be limited to the potential market share.

IMPORTERS/USERS

Ties Import & Marketing Ltd.
6 Bertonov Street
Tel Aviv 69350
Contact: Mr. S. Maharovsky
Tel:(972) 349-1119
Fax:(972) 347-6425

For Further Information Contact:
Canadian Embassy
Officer: Atalia Hausvater
P.O. Box 6410
Tel Aviv 61063, State of Israel
Tel:(011-972-3) 527-2929
Fax:(011-972-3) 527-2333

TURKEY

SUPPLY & CONSUMPTION

Turkish market for lobsters is very small, between 150-200 tonnes. Lobster is a luxury seafood item in Turkey and sells at very high prices in shops and restaurants. High prices make lobster products affordable to only a very small portion of Turkish people, who had a per capita income of US$2600 in 1991. Both fresh and frozen lobster products are imported. Almost 90% of annual consumption occurs in restaurants and hotels. Local production of lobster totalled 51 tonnes in 1991 and 43 tonnes in 1992. Total imports for 1992 were: H.S.0306.12.1 (1960 tonnes), and 0306.22.1 (345 tonnes).

DISTRIBUTION SYSTEMS

Agents and wholesale traders are involved in distribution. Restaurants and hotels purchase from commission agents and wholesale traders. Importers also prefer to sell through agents and traders. Some large hotels (Hilton, Sheraton), import directly for their own restaurants, however this only represents very small quantities.

PHYTOSANITARY REGULATIONS

A phytosanitary certificate should be presented during the customs clearing process, which is bureaucratic and lengthy. When importers apply to the Customs Entry Directorate, an inspector is assigned; this can be another time consuming process.

TARIFFS/NTB'S

The customs duty on imported lobster is 25%, however, an additional 18-20% is also charged as a surcharge for the Industry Stabilization Fund, Defence Fund, Urban Services Support Fund, Stamp Duty Fund, etc.

PROMOTIONAL ACTIVITIES

The small size of Turkish lobster market does not warrant a strong promotional activity in the form of government participation in exhibitions, or missions from Canada. Should a Canadian exporter decide to launch an active marketing campaign in Turkey, the best food exhibition would be the International Food and Beverage and Service Equipment Fair, which is held in February. Canadian exporters should however, first try to determine if any business can be done through Turkish importers.

POST COMMENTS

The image of Canadian lobster is excellent in Turkey. However, it is not expected that there will be significant growth in Turkish demand for lobster in the near future as lobster will continued to be consumed by only a very small segment of the Turkish population.

IMPORTERS/USERS

Akdag Ltd. Sti.
Musir Dervis Ibrahim Sok. #24/5
Esentepe, Istanbul
Tel:(901) 272-7206/7
Fax:(901) 267-1926

Dardanel Gida Sanayi A.S.
Ziya Gokalp Caddesi No. 19
Kucukcekmece, Istanbul
Tel:(901) 580-2887
Fax:(901) 579-0495

For Further Information Contact:
Canadian Embassy
Officer: Can Ozguc
Nenehatun Caddesi 75
Gaziosmanpasa, 06700 Ankara
Republic of Turkey
Tel:(011-90-4) 436-1275/446-2811
Fax:(011-90-4) 446-4437

EXTERNAL AFFAIRS AND INTERNATIONAL TRADE CANADA
GEOGRAPHIC TRADE DIVISIONS

If you are seeking advice and information about a specific area or country, Trade Commissioners in the **Geographic Trade Divisions** are available to assist you. They are located at 125 Sussex Drive, Ottawa, Ontario, K1A 0G2 [Fax:(613) 996-9103].

LATIN AMERICA AND CARIBBEAN TRADE DIVISION (LGT)
Tel:(613) 996-5546; Fax:(613) 943-8806

Argentina, Bermuda, Bolivia, Brazil, Chile, Colombia, Commonwealth Caribbean, Costa Rica, Cuba, Dominican Republic, Ecuador, El Salvador, French West Indies, Guatemala, Haiti, Honduras, Mexico, Netherlands Antilles, Nicaragua, Panama, Paraguay, Peru, Puerto Rico, Uruguay, Venezuela

UNITED STATES TRADE AND INVESTMENT DEVELOPMENT DIVISION (UTI)
Tel:(613) 944-5849; Fax:(613) 944-9119

Chicago, Cinncinati, Cleveland, Dayton, Denver, Detroit, El Sugundo, Los Angeles, Minneapolis, Pittsburgh, San Diego, San Francisco, Santa Clara, Seattle, St. Louis

UNITED STATES TRADE AND TOURISM DEVELOPMENT DIVISION (UTO)
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China, Hong Kong, Indochina, Korea, Taiwan

JAPAN TRADE DEVELOPMENT DIVISION (PNJ)
Tel:(613) 995-1281; Fax:(613) 943-8286

AFRICA AND MIDDLE EAST TRADE DEVELOPMENT DIVISION (GBT)
Tel:(613) 990-6593; Fax:(613) 990-7431/7

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CENTRAL AND EASTERN EUROPE TRADE DEVELOPMENT DIVISION (RBT)
Tel:(613) 996-2858; Fax:(613) 995-1277

Albania, Bulgaria, C.I.S., Czechoslovakia, Hungary, Mongolia, Poland, Romania, Yugoslavia

WESTERN EUROPE TRADE, INVESTMENT AND TECHNOLOGY DIVISION (RWT)
Tel:(613) 995-9401; Fax:(613) 995-6319

Austria, Belgium, Cyprus, Denmark (incl. Greenland), Finland, France, Germany, Greece, Iceland, Ireland, Italy, Luxembourg, Malta, Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, Turkey, United Kingdom

INTERNATIONAL TRADE CENTRES

External Affairs and International Trade Canada and Industry, Science and Technology Canada established **International Trade Centres (ITCs)** across Canada to assist first-time and experienced exporters by providing export publications, recruiting participants for trade fairs and missions, providing a wide range of services to companies seeking export counselling, technology transfer or joint ventures with foreign investors. Co-located with the regional offices of Industry, Science and Technology Canada (ISTC), the centres operate under the guidance of EAITC and all have resident Trade Commissions. For further information exporters are encouraged to contact the ITC nearest you. Export counselling is also available through External Affairs and International Trade Canada's Info Export Office in Ottawa which can be reached toll free at 1-800-267-8376; local callers: 993-6435.

NEWFOUNDLAND
International Trade Centre
215 Water Street, Suite 504,
P.O. Box 8950,
St.John's, Newfoundland
A1B 3R9
Tel:(709) 772-5511
Fax:(709) 772-2373

NEW BRUNSWICK
International Trade Centre
P.O.Box 1210,
Assumption Place
770 Main Street
Moncton, New Bruinswick
E1C 8P9
Tel:(506) 851-6452
Fax:(506) 851-6429

MANITOBA
International Trade Centre
P.O.Box 981,
330 Portage Avenue, 8th Floor,
Winnipeg, Manitoba
R3C 2V2
Tel:(204) 983-4099
Fax:(204) 983-2187

P.E.I.
International Trade Centre
P.O.Box 1115,
Confederation Court Mall
134 Kent Street, Suite 400,
Charlottetown, P.E.I.
C1A 7M8
Tel:(902) 566-7400
Fax:(902) 566-7450

QUEBEC
International Trade Centre
P.O.Box 247,
Stock Exchange Tower
800 Place Victoria, Suite 3800,
Montreal, Quebec
H4Z 1E8
Tel:(514) 283-8185
Fax:(514) 283-8794

SASKATCHEWAN
Saskatoon
International Trade Centre
The S.H. Cohen Building
#119-4th Avenue South, 4th Floor,
Saskatoon, Saskatchewan
S7K 5X2
Tel:(306) 975-5315
Fax:(306) 975-5334

Regina
International Trade Centre
1955 Smith Street
4th Floor,
Regina, Saskatchewan
S4P 2N8
Tel:(306) 780-5020
Fax:(306) 780-6679

BRITISH COLUMBIA
International Trade Centre
P.O.Box 11610,
900-650 West Georgia Street
Vancouver, British Columbia
V6B 5H8
Tel:(604) 666-0434
Fax:(604) 666-8330

NOVA SCOTIA
International Trade Centre
P.O.Box 940, Station "M",
1801 Hollis Street
Halifax, Nova Scotia
B3J 2V9
Tel:(902) 426-4782
Fax:(902) 426-2624

ONTARIO
International Trade Centre
Dominion Public Building,
4th Floor,
One Front Street West
Toronto, Ontario
M5J 1A4
Tel:(416) 973-5053
Fax:(416) 973-8161

ALBERTA
Edmonton
International Trade Centre
Room 540, Canada Place
9700 Jasper Avenue
Edmonton, Alberta
T5J 4C3
Tel:(403) 495-2944
Fax:(403) 495-4507

Calgary
International Trade Centre
Suite 1100,
510-5th Street S.W.,
Calgary, Alberta
T2P 3S2
Tel:(403) 292-6660
Fax:(403) 292-4578

WHERE THE WORLD SHOPS

Selected Major International Trade Fairs for Lobster Products

Foodex
Tokyo
March 8-14/93
Frequency: Annual
Products: All food items inc. beverages,meat,poultry,dairy, seafood, canned goods, confectionary etc.
Visitor profile: (1991) Total, 84,419
Exhibitor profile: (1991) Total, 982 Food and beverage mfg. and importers.
Organizer: Japan Management Assoc.
Fax: 03-343-48076

ANUGA
World Food Market
Dusseldorf
Oct. 93
Frequency: Biennial.
Products: Food and provisions of all types.
Exhibitors: (1989) National 1565. Foreign 3422
Visitors profile: (1989) National 169,184. Foreign 67,781
Organizers: KolnMessa und Ausstellungs
Fax:0221-8212574

ANTAD
Mexico
March. 1994
Frequency: Annual
Products: Multi-sectoral. Large food component.
Exhibitor profile: Mostly national
Visitor profile: Mostly national and Latin America.
Organizer: Nat. Retailers Assoc. of Mexico
Fax: 203-44-95

Int'l. Food Exhibition (IFE)
London April 1994
Frequency: Biennial
Products: Food and drink (no equip).
Exhibitor profile: (1989) Total.1400.
Visitor profile: (1989) National -42,032. Foreign -5150
Organizer: Interbuild Exhibitions
Fax: 0-71-4873923

SIAL
Paris
Oct. 1994
Frequency: Biennial
Products: Food products including dairy, game, meat, poultry, confectionary, fruit, vegetables, seafood, etc.
Exhibitor profile: (1990): National-2169: Foreign-2430.
Visitor profile: (1990) : National- 48688: Foreign- 41501.
Organizers: SIAL
Fax: 01-42.89.46.94

Food Marketing Institute - FMI
Chicago
May 9-12, 1993
Frequency: Annual
Products: Equipment and food products
Exhibitor profile: (1991) National - 900, foreign - 100
Visitor profile: (1991) 35,000:
Top management from food companies in Canada, Mexico and overseas.
Organizers: Food Marketing Inst.
Fax: 202-429-4519

Restaurant, Hotel and Motel Show
Chicago
May 21-25,1994
Frequency: Annual
Products: Food and beverages of all kinds.
Exhibitor profile: (1991) National-900. Foreign-100
Visitor profile: (1991) Total: 35,000
Organizers: National Restaurant Assoc.
Fax: 312-853-2548

Seafare Int'l.
Long Beach,
Feb. 1993
Frequency: Annual
Products: Seafoods and equip.
Exhibitor profile: (1991) Total. 550
Visitor profile: (1991) Total. 11,000.
Distributors, retailers, brokers, wholesalers.
Organizers: Seafare Expositions Inc.
Fax: 206-548-9346

Int'l. Boston Seafood Show
Boston
March 16-18/93
Frequency: Annual
Products: All seafood products and equip.
Exhibitor profile: (1990) 753
Visitor profile: (1990) Total 19,500 from 17 countries.
Organizers: National Fishermans Expositions Inc.
Fax: 207-772-55059

European Seafood Exhibition
Brussels
Apl. 20-22/93
New 1993.
Organized by Int'L. Boston Seafood Show managers. (see above)

Tokyo Int'l Seafood Show
Tokyo
June 10-12, 1993 (this is a new show for 1993)
Frequency: Annual
Products: Fish, seafood and equip.
Exhibitor profile:
Visitor profile:
Organizers: Overseas Exhibitions Ltd. London.
Fax: 01-44-0-71-486-8773

ALIMENTARIA Int'l. Food Fair
Barcelona
March 1994
Frequency: Biennial
Products: Food and fish products. Multi product.
Exhibitor profile: (1988) National 865. Foreign 76 Visitor profile: Total. 293,000
Organizers: PROSEMA
Fax: 03-3018998

Note:

This list highlights a selection of major international trade fairs, events which attract an international audiance. Canadian companies interested in these shows should contact EAITC to see if a national exhibit is planned.

SIAL
Paris
Oct. 1994
Frequency: Biennial
Products: Food products including dairy, game, meat, poultry, [illegible] etc.
Exhibitor profile: (1990): National-2169: Foreign-24[illegible]
Visitor profile: (1990) : National- 48688: Foreign- 41509[illegible]
Organizers: SIAL
Fax: 01-42.89.46.94

Food Marketing Institute - FMI
Chicago
May 9-12, 1993
Frequency: Annual
Products: Equipment and food products
Exhibitor profile: (1991) National - 900, foreign - 100
Visitor profile: (1991) 35,000:
Top management from food companies in Canada, [illegible]
Organizers: Food Marketing Inst.
Fax: 202-429-4519

Restaurant, Hotel and Motel Show
Chicago
May 21-25,1994
Frequency: Annual
Products: Food and beverages of all kinds.
Exhibitor profile: (1991) National-900, Foreign-100
Visitor profile: (1991) Total: 35,000
Organizers: National Restaurant Assoc.
Fax: 312-853-2548

Seafare Int'l.
Long Beach,
Feb. 1993
Frequency: Annual
Products: Seafoods and [illegible]
Exhibitor profile: (1991) [illegible]
Visitor profile: (1991) Total [illegible]
Distributors, retailers, brokers, wholesalers
Organizers: Seafare Expositions Inc.
Fax: 206-548-9346