

Market Development

MARKET BRIEF ON LOBSTERS

OVERVIEW OF THE EUROPEAN COMMUNITY
1993

ITC



INTERNATIONAL TRADE CENTRE UNCTAD/WTO

Lobsters - EC Overview

Product description

CN 0306.11	Rock lobster and other sea crawfish (frozen)
CN 0306.12-10	Lobsters: whole (frozen)
CN 0306.12-90	Lobsters: other (frozen)
CN 0306.21	Rock lobster or other sea crawfish (not frozen)
CN 0306.22-10	Lobsters: (live)
CN 0306.22-91	Lobsters: whole (not frozen)
CN 0306.22-99	Lobsters: other (not frozen)

Production

Nominal catches of lobster averaged 2,000 tons per year during the period 1987-1990 and consisted mainly of European lobster, *Homarus gammarus*. The United Kingdom, France and Ireland are the main EC producers (**Source:** FAO).

Imports

Q: metric tons	1989		1990		1991	
V: ECU '000	Q	V	Q	V	Q	V
0306.11	4,085	55,703	4,204	55,975	4,351	75,302
0306.12-10	3,120	25,202	3,545	21,561	4,150	31,111
0306.12-90	749	3,007	820	3,249	586	2,398
0306.21	1,401	25,907	1,357	27,405	1,179	25,033
0306.22-10	6,753	78,915	9,683	90,593	11,421	110,762
0306.22-91	159	1,384	88	1,022	103	791
0306.22-99	19	231	42	502	31	402

Source: Eurostat.

France is by far the largest EC importer of lobsters followed by Italy, Belgium and Germany. Canada and the United States are the leading suppliers to the EC. However, the large majority of smaller suppliers are developing countries such as Cuba, Brazil, Yemen, South Africa, India, Senegal, Oman, Morocco, Belize, Tunisia, United Arab Emirates, Mauritania, Togo, Cape Verde, Costa Rica, Mexico, Iran, Panama, Somalia, Ghana, Kenya and Madagascar.

Market characteristics

Various shellfish species are commonly called lobsters whereas only two clawed varieties are strictly defined as such: the American lobster (*Homarus americanus*) and the European lobster (*Homarus gammarus*). Other types of "lobsters" like the rock lobster and the crayfish, spiny and non-clawed, are equally known and appreciated.

Lobsters are still considered in Europe as a gourmet product and peak market demand occurs during special periods like Christmas and New Year or for other festive events which differ from country to country. Consumption is also higher between May and July, corresponding to the European lobster landings period.

Imported lobsters are marketed live or frozen in brine to fish wholesalers. At the end-user's level, the hotel and restaurant industry offers the best sales potential, especially for small/medium sized lobsters (400/600 g).

Market access

EC member states apply the Common External Tariff:

Product description		Rate of duty in % (conventional)
CN 0306.11	Rock lobster and other sea crawfish (frozen)	25
CN 0306.12	Lobsters:	
CN 0306.1210	Whole	8 (1)
CN 0306.1290	Other	16
CN 0306.21	Rock lobster and other sea crawfish (not frozen)	25
CN 0306.2	Lobsters:	
CN 0306.2210	Live	8 (1)
CN 0306.2291	Whole	8 (1)
CN 0306.2299	Other	20

(1): subject to limits and conditions to be determined by the competent authorities.

No duties are levied on imports of lobsters from ACP countries (African, Caribbean and Pacific countries), from the Maghreb and from Turkey.

Under the GSP scheme (Generalized System of Preferences) a preferential tariff, ranging from 4% to 7% is granted to developing countries (imports of lobster from Least Developed Countries enter duty-free).

A single market regulation for fish, covering production, processing, and trading (including sanitary regulation) is expected to enter in force on 31 December 1995.

The following FAO publication gives details on Recommended International Code of Practice and International Standards on lobster: CAC/RCP 24-1979 and CAC/RS 95-1978.

Prices

Usually, live products are twice the price of frozen products. They are subject to wide fluctuations, and price levels double easily in winter. Quotations for frozen items show less variation.

During the last few years, lobster has become relatively more accessible, as prices were stable, setting lobsters that were out of reach for some consumers within the range of festive products that are affordable.

Infofish Trade News (see address below) publishes price information on fish and fish products, including lobster.

Packaging and transport

Imported live lobsters are generally shipped by plane in order to reduce mortality rate and should be packed in compliance with the regulations of the airline involved.

Live lobsters are normally put dry into watertight polystyrene boxes of 10 kg net weight or less and protected by outer cartons wrapped in plastic film. Inside the boxes, cushion should be provided by wood fibre or paper and appropriate chilling ensured by layers of crushed ice or wet and chilled sawdust possibly complemented by freezer packs (isothermic blocs/pouches). The pincers of *Homarus* spp. should be taped shut.

Increasingly popular is the so called "popsicle pack" for frozen lobsters in brine: the product is pre-cooked, vacuum-packed in salt water and put in layers of crushed ice.

Distribution channels

Imports are generally handled by specialized fishery firms. The usual system of distribution in the EC is from importer to local wholesaler who distributes to caterers and retailers (see list of importers).

Sales promotion

Some exporters and retailers are introducing recipe leaflets in order to present the product to new customers. However, marketing of lobster is still a challenging task, as this product is still considered by the majority of consumers as an exclusive delicacy.

A number of trade fairs, specializing in food and seafood products, take place in the EC, representing an important opportunity for observing evolution and trends of the demand and for making business contacts.

Market opportunities

As the average retail price of lobsters tends to be stable (about 5% increase over the last three years) and promotional activities have been enhanced and improved (particularly at the end of the year), the market should continue to expand in the EC. According to trade sources, imports of lobster in the EC grew in 1992, and the trend will continue in the near future.

Good opportunities can be seized by conducting research on the processing side, introducing new lobster products characterized by innovative packaging methods (for example the brine pack), in order to make the product more accessible to larger groups of consumers.

Useful address

FAO-Globefish
Via delle Terme di Caracalla
00153 Rome (Italy)
Tel: (6) 57976389
Fax: (6) 5404297

Trade fairs

ANUGA
Messe-und Ausstellungs Gesellschaft
(October, odd years)
P.O. Box 210760
D-5000 Cologne (Germany)
Tel: (221) 82111
Fax: (221) 8212574

SIAL
(October, even years)
27, rue du Général-Foy
75008 Paris (France)
Tel: (1) 42 94 22 73
Fax: (1) 42 94 04 45

Specialized periodicals

Seafood International
EMAP Heighway Publishing Ltd
21, John Street
London WC1N 2BP (United Kingdom)
Tel: (71) 404 5513
Fax: (71) 831 9362

Infofish International
P.O.Box 10899
Kuala Lumpur (Malaysia)
Tel: (603) 291 4466
Fax: (603) 291 6804

Infofish Trade News
(same address as Infofish International)

Globefish Highlights
(same address as FAO Globefish)

Sources of information

- EUROSTAT - Analytical Tables of Foreign Trade, NIMEXE.
- Seafood International - various issues
- Infofish Trade News - various issues
- International Customs Tariffs Bureau - Brussels
- FAO Yearbook - Fishery statistics, Vol. 71, 1990.

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This market brief has not been formally edited by ITC.

List of importers and wholesalers
(non-exhaustive)

France

Brousse Poissonnerie
20, rue du 11 Novembre
27400 Louviers
Tel: 32 40 78 33
Fax: 32 25 18 20

A.V.I.P.
17, allée de Métallos
Z.I. Secteur A.
B.P. 58
06702 Saint Laurent du Var
Tel: 93 31 01 91
Tlx: 970483

Sud-Ouest Alimentation
154, av. de Fronton
31200 Toulouse
Tel: 61 37 30 30
Fax: 61 13 82 27

SORIC (Société d'Importation,
Représentation, Commission,
Courtages Internationaux)
15, bd Robert Schumann
B.P. 88
13472 Marseille Cedex
Tel: 91 56 12 34
Fax: 91 56 13 33

CIB
56, rue F. Buisson
62200 Boulogne sur Mer
Tel: 21 92 07 35
Fax: 21 31 13 95

Flash International
148, bd Massena
75013 Paris
Tel: (1) 45 85 72 27
Fax: (1) 45 85 19 74

Davigel SA
B.P. 41
76201 Dieppe
Tel: 35 04 76 00
Fax: 35 82 22 52

Pinteaux Renet
Route de Reville
50550 Saint Vaast La Hougue
Tel: 33 43 20 20
Fax: 33 20 39 31

IPC (International Packers &
Canners)
15, bd Robert Schumann
B.P. 88
13472 Marseille Cedex
Tel: 91 91 76 61
Fax: 91 56 13 33

Crustimex
232, av. du Prado
13008 Marseille
Tel: 91 77 91 91
Fax: 91 76 23 76

Adrigel France
Aéropôle - Rue C. Lindberg
Immeuble Rafale
44340 Bouguenais
Tel: 40 05 30 44
Fax: 40 75 32 54

La Surgélation Alimentaire
7-11, rue de Verdun
B.P. 78
62201 Boulogne sur Mer
Tel: 21 33 92 33
Fax: 21 30 48 06

Pomona
21, rue du Pont Neuf
75001 Paris
Tel: (1) 40 28 30 00
Fax: (1) 40 26 58 95

AEC (Asiatique Européenne de
Commerce)
76, bd de la République
92100 Boulogne Billancourt
Tel: (1) 46 08 41 81
Fax: (1) 46 20 23 54

Belgium

Christiaens Bvba
Zeevisgroothandel Import & Export
Kraakstraat Transportzone
8380 Zeebrugge
Tel: (50) 54 51 37
Fax: (50) 54 77 65

Huysseune Bvba (Raphaël)
Vismijnstraat 30
8380 Zeebrugge
Tel: (50) 54 41 41
Fax: (50) 54 73 01

Pieters NV (Visbedrijf)
Kolvestraat 4
Industrieterrein "Blauwe Toren"
8000 Brugge
Tel: (50) 32 05 11
Fax: (50) 31 98 52

2W - BOS NV
Kruisboomstraat 1
3400 Overwinden
Tel: (11) 88 53 66
Fax: (11) 88 53 68

De Backer en Co. Bvba
Burgemeester Maenhoutstraat 26
9820 Merelke
Tel: (91) 52 25 01
Fax: (91) 52 36 84

Germany

EMF Seafood GmbH
Am Fischbahnhof 2
2850 Bremerhaven
Tel: (471) 730 94
Fax: (471) 730 97

Weser Feinkost GmbH & Co. KG
Industriestrasse 1-9
2808 Syke 1
Tel: (4242) 598 0
Fax: (4242) 598 22 88

Ocean-Fisch Vertriebs GmbH
Am Lunedeich, Halle 16-17
Postfach 29 04 52
2850 Bremerhaven
Tel: (471) 738 57
Tlx: 238831

Mitsubishi International GmbH
Kennedydamm 19
Postfach 32 08 20
4000 Düsseldorf 30
Tel: (211) 439 70
Fax: (211) 439 73 33

Netherlands

Heiploeg BV
Dorpstraat 52
9974 Zoutkamp
Tel: (5956) 5555
Fax: (5956) 2354

Helmink Groep BV
Aaltenseweg 63
7051 Varsseveld
Tel: (8352) 561 11
Fax: (8352) 563 33

Heijer & Zn BV, W.G. den
Visserhavenweg 50
2583 's-Gravenhage
Tel: (70) 354 75 00
Fax: (70) 351 27 30

Winter & Konijn BV, De
Straatweg 66
3621 Breukelen
Tel: (3462) 658 74
Fax: (3462) 638 54

United Kingdom

Chamberlain and Thelwell Ltd
Office 54, Billingsgate Market
West India Dock Road
London E14 8ST
Tel: (71) 987 2506

London Shellfish Co.
London House
243, Lower Mortlake Road
Richmond TW9 2LS
Tel: (81) 948 5166
Tlx: 94017587 fish g

Anchor Seafood Ltd
Devonshire House
Handcross
West Sussex, RH17 6BJ
Tel: (444) 400 363
Fax: (444) 400 949

Crowns Foods Ltd
Britannia House,
Station Street,
Lymington, Hampshire
Tel: (590) 76 911
Fax: (590) 75 485

Ramus Seafoods
Ocean House
Kings Road
Harrogate
Tel: (423) 563271
Fax: (423) 501910

Specialty Seafoods Ltd
104/106 Chiswick High Road
London WA 1PU
Tel: (71) 995 2422
Fax: (71) 995 4120

Italy

PANAPESCA
Via Calderaio-Traversagna
51010 Massa e Cozzile
Tel: (572) 77 91
Fax: (572) 77 21 86

PESCLAUDIO
Via Ponte Vetero, 18
20121 Milan
Tel: (2) 80 14 46
Fax: (2) 87 99 56

FERPESCA
Via Pacinotti, 27
37135 Verona
Tel: (45) 820 02 00
Fax: (45) 58 13 46

FERRETTO
Via Pacinotti, 27
37135 Verona
Tel: (45) 50 47 55
Fax: (45) 820 08 35

Lobsters - Japan

Product description

0306.11-000	Rock lobster and other sea crawfish (frozen)
0306.12-000	Lobsters (frozen)
0306.21-110	Rock lobster and other sea crawfish (live)
0306.21-190	Rock lobster and other sea crawfish (fresh or chilled)
0306.22-100	Lobsters (live, fresh or chilled)

Commodity Classification for Foreign Trade Statistics (CCFTS), based on the Harmonized Commodity Description and Coding System (HS).

Imports

Q: metric tons	1989		1990		1991	
V: Yen million	Q	V	Q	V	Q	V
0306.11-000	12,242	24,725	11,997	28,005	12,377	33,056
0306.12-000	1,112	1,784	1,330	1,796	2,109	3,571
0306.21-110	2,341	7,739	2,374	8,848	2,402	9,549
0306.21-190	2	9	2	7	1	4
0306.22-100	1,318	2,701	1,360	2,778	1,505	3,044

Source: Japan Exports & Imports, Japan Tariff Association.

Main origins of imports (Yen million, 1991)

0306.11-000: Total imports 33,056 of which: Australia 9,298, Cuba 4,265, South Africa 3,808, India 3,154, Brazil 3,107. Important suppliers among developing countries are also Namibia, Pakistan, Vietnam, Philippines, Madagascar, Mozambique and Indonesia.

0306.12-000: Total imports 3,571 of which: Canada 2,233, United States 596, Australia 389. Important suppliers among developing countries are India, Brazil, Philippines, Honduras, Indonesia, Yemen and Vietnam.

0306.21-110: Total imports 9,549 of which: New Zealand 4,754 and Australia 4,633. Major suppliers among developing countries are Indonesia and Philippines.

0306.22-100: Total imports 3,044 of which: Canada 2,072 and United States 879.

Market characteristics

With imports totalling 49 billion yen in 1991 (US\$ 400 million), Japan is the second largest world importer of lobster after the United States.

Frozen lobsters cover two-thirds of the market of imported lobster in Japan. Given, however, the consumers' preference for fresh fish products, imports of these categories showed a relatively higher growth. The spiny, non-clawed lobster imported from Australia and New Zealand, are more popular than the clawed species imported principally from Canada and the United States.

Lobster is considered a gourmet product to be consumed for special events, with December being the peak period. The demand is higher in urban areas and with the restaurant industry.

Market access

The rate of customs duty applicable to imports of lobsters and lobster products are 3% (ad valorem), under the provisions of the Japanese Customs Tariff Law (the above tariff applies to GATT's member states whereas the "General" tariff is 10% and the "Temporary" is of 4%).

The Temporary Tariff Measures Law grant duty-free entrance for lobsters originating from the Least Developed Countries (LDCs).

Imports are subject to the Food Sanitation Law. The Japanese administration is very strict concerning any residual antibiotics and cholera germs: when some are detected, the Customs Office is obliged by law to order the disposal or return of the shipment.

Packaging and transport

See EC overview for information about packaging of lobster. Concerning transport, it must be noted that in the last few years, there has been a considerable increase in air shipments of all crustaceans, including lobsters.

Distribution channels

Lobsters are mainly imported by fishery companies and trading companies which deliver them either to specialized primary wholesalers or to central wholesale markets.

Sales of fish products through supermarkets and department stores increase regularly; small retail outlets tend to disappear or to constitute buying groups.

Market opportunities

Demand for lobster is growing and it increasingly relies on imports as domestic catches decrease. Consumer buy high-value fish products, and imports of lobsters are expected to continue growing.

Good prospects exist for new suppliers from developing countries offering a high quality product, as required by this market. Competition from already established suppliers is strong.

Useful addresses

Fisheries Marketing Division
Fisheries Agency
Ministry of Agriculture and Forestry
and Fisheries
2-1, Kasumigaseki 1-chome
Chiyoda-ku
Tokyo 100
Tel: (03) 3502 8111
Fax: (03) 3591 6967

Japan Frozen Food Association
No. 2 Katsuraya Bldg
10-6, Nihonbashi Kobunecho
Chuo-ku
Tokyo 103
Fax: (03) 3669 2117

Japan Marine Products Importers Ass.
Yurakucho Bldg
10-1, Yurakucho 1-chome
Chiyoda-ku
Tokyo 100
Fax: (03) 3214 3408

JETRO Tokyo Internationalization
Center
2-5, Toranomom 2-chome
Minato-ku
Tokyo 105
Tel: (03) 3582 5171
Fax: (03) 3589 4179

List of importers

(non-exhaustive)

Cato Trading Co. Ltd
Kikyobizen Bldg 4th Floor
1-19-6, Nishi-Shimbashi
Minato-ku
Tokyo 105
Tel: (03) 581 2927
Fax: (03) 581 2995

Century Yamakyu Corp.
2-5-8, Minami-Semba
Chuo-ku
Osaka 542
Tel: (06) 266 1213
Tlx: 64972 cntltd j

Happy World Inc.
1-19-10, Jinnan
Shibuya-ku
Tokyo 104
Tel: (03) 3476 0071
Fax: (03) 3770 8447

Meiwa Trading Co. Ltd
Shin-Tokyo Bldg
3-3-1, Marunouchi
Chiyoda-ku
Tokyo 100
Tel: (03) 3240 9538

Marinca Co. Ltd
67, Shimo-omi-cho
Kanazawa City
Ishikawa 920
Tel: (0762) 22 3130
Fax: (0762) 60 6411

Sanko Trading Co. Ltd
12-12, Roppongi 4-chome
Minato-ku
Tokyo 106
Tel: (03) 478 2221
Fax: (03) 478 2225

Hoko Fishing Co. Ltd.
2-4, Tsukiji 1-chome
Chuo-ku
Tokyo 104
Tel: (03) 542 5641
Fax: (03) 545 2167

Kohyo Co. Ltd
5-4-9, Shinsho cho
Yokkaichi 510
Tel: (0593) 54 5411
Tlx: 49482411 kohyo j

Inwatani International Corp.
7-1, Hatchobori 2-chome
Chuo-ku
Tokyo 104
Tel: (03) 3555 5741
Fax: (03) 3555 5633

Okmma Overseas Ltd.
15 Koyama Nishikazusa-cho
Kita-ku
Kyoto 603
Tel: (075) 491 1370
Fax: (075) 491 1373

Shinyei Kaisha
77-1, Kyo-machi
Chuo-ku
Kobe 650
Tel: (078) 392 6800
Fax: (078) 332 0217

Schooner Co. Ltd
10-20, Akasaka 7-chome
Minato-ku
Tokyo 107
Tel: (03) 3587 0021
Fax: (03) 3587 1500