

Market Development

MARKET BRIEF ON

LOBSTERS

FRANCE

1996

ITC



INTERNATIONAL TRADE CENTRE UNCTAD/WTO

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GENEVA

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LOBSTERS - FRANCE

Product description

HS	03 06 11	Frozen rock lobster and other sea crawfish, whether in shell or not, including rock lobster and other crawfish in shell, cooked by steaming or by boiling in water.
	03 06 12 10	Frozen lobsters, whole, including lobsters in shell, cooked by steaming or by boiling in water.
	03 06 12 90	Frozen lobsters (excluding whole).
	03 06 21	Rock lobster and other sea crawfish, whether in shell or not, including in shell, cooked by steaming or by boiling in water (excluding frozen).
	03 06 22 10	Live lobsters.
	03 06 22 91	Whole lobsters, including lobsters in shell, cooked by steaming or by boiling in water (excluding frozen).
	03 06 22 99	Lobsters (excluding frozen and whole).
SITC3	036.2	Lobsters, fresh, chilled, dried, salted or in brine.
	036.19	Lobsters, frozen. Lobsters, in shell, simply steamed or boiled in water and subsequently frozen.
	037.21	Lobsters, prepared or preserved, not simply frozen, dried, salted, in brine, steamed or boiled in water in shell.

Domestic production (catch)

France and the United Kingdom are the main producers of lobsters in Europe where 2,500 tons are caught each year. French catch, which amounts to about 450 tons a year is in competition with the British and Irish productions.

France and the United Kingdom are small producers compared to the USA and Canada whose production vary between 45,000 and 75,000 tons a year.

Trade

During the period 1991-1995, lobster imports fluctuated annually around 10,000 metric tons and some US\$ 130 million. The following table shows that frozen and live lobster are the major import categories.

Imports of lobster into France

V: in '000 ECU	1991		1992		1993		1994		1995	
Q: in metric tons	Q	V	Q	V	Q	V	Q	V	Q	V
03 06 11	2,989	58,224	2,142	37,665	1,847	31,577	2,043	40,842	2,395	46,246
03 06 12 10	2,540	18,537	1,576	12,081	1,507	11,187	1,637	13,393	1,725	16,795
03 06 12 90	387	669	446	1,404	401	695	639	2,003	569	1,306
03 06 21	446	8,650	345	6,764	379	6,312	339	5,768	279	5,101
03 06 22 10	3,910	39,477	3,588	37,798	3,236	35,040	3,490	38,122	3,355	34,041
03 06 22 91	5	64	8	102	21	277	16	261	5	75
03 06 22 99	2	42	0	0	12	149	3	25	4	22

Source: EUROSTAT-COMEXT

As can be seen in Annex I, in 1995, in the intra- EU trade, the principal supplier of lobster to France was the United Kingdom which accounted for 40% of total arrivals in terms of value, followed by the Netherlands (21%) and Ireland (15%). These countries export the European lobster (*Homarus gammarus*) which is principally caught in British and Irish waters.

In 1995, 90% of supply from non EU countries came from the American continent, particularly from the Caribbean sea. Canada is the principal exporter and accounted for 32% of total French imports, is followed by the Bahamas (20%), the USA (16%), Cuba (13%) and Nicaragua (4%). The lobster imported from these countries is the American species (*Homarus americanus*). More than 30 countries export lobster to France, the large majority being developing countries.

Market characteristics

Two sorts of lobster compete on the French market: the European lobster (*Homarus gammarus*) and the American lobster (*Homarus americanus*). The first one, not largely available and consequently more expensive is considered as a gourmet product. The second one is less expensive and is available in large quantities. The American lobster was introduced in the French market in 1985; up to this date, the European lobster had no major competitor. Lobsters of 350 to 560 grams and those 670 to 790 grams are the most in demand.

Sales of frozen lobster are stable while those of fresh boiled lobster and live lobster are developing. New products such as "terrines" made of the inside of lobsters' heads are entering the market.

Until recently, lobsters were mainly sold for festive events but now sales are spread over the whole year. This is due to the low prices of American lobster which makes this product more accessible to consumers.

Consumption of live lobsters is well developed in France and is over 3,500 tons a year. French producers have created an association (Association des Homardiens des Côtes de France) to satisfy this demand and to assure the quality of their products. The main clients for live lobsters are restaurants which account for about two-thirds of the demand.

Market access

The EU "Common Customs Tariff" is applied in France. In 1996, imports were subject to the following duties (the figures in brackets are the bound rate of duty in % following the Uruguay Round of multilateral trade negotiations):

Product description		Rate of duty in %	
		Conventional	
HS 03 06 11	Rock lobster and other sea crawfish (frozen)	17.5	(12.5)
HS 03 06 12 10	Lobsters: whole (frozen)	8	8
HS 03 06 12 90	Whole: other (frozen)	16	16
HS 03 06 21	Rock lobster and other sea crawfish (not frozen)	17.5	(12.5)
HS 03 06 22 10	Lobsters: live	8	8
HS 03 06 22 91	Lobsters: whole (not frozen)	8	8
HS 03 06 22 99	Lobsters: other (not frozen)	14	(10)

Under the Uruguay Round, reduction will be implemented in equal installments from 1995 to 2000.

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

Imported fish and fishery products have to be accompanied by a health certificate issued by a competent authority.

Prices

Prices vary according to species, size, seasons and other factors. The average price of European lobster, in Rungis (the wholesale fish market in Paris), is twice the price of lobster imported from Canada. Prices can fluctuate considerably during the year, depending on availability. Hypermarkets and supermarkets apply up to 25% margin on their sale prices while restaurants multiply the import price by 3 or 4 times to the final consumer. Indicative export prices are published in “Infofish” (see **Sources of information**).

Packaging and transport

Lobsters are shipped by plane from North America. They are packed in boxes of 6 to 13,5 kg, which are placed in containers of a capacity of 110 to 150 boxes. The product is guaranteed with a loss of water below 5%. According to the Code of practice for lobsters (CAC/RCP 24-1979) of the joint FAO/WHO Food Standards Programme, Codex Alimentarius, live lobsters for human consumption must be free from dirt, must have a low level of bacteria and must not have salmonella or toxic substances.

Generally, world airlines will only accept live fish packed according to the International Air Transport Association (IATA), Live Animals Regulations.

Additional information on packaging can be obtained from the ITC Packaging Service.

Distribution channels

Lobsters are mainly sold through supermarkets and hypermarkets (55.5%) followed by fish shops (19.5%), open-air markets (11%), and direct sales (11%). Direct sales to retailers of live lobsters are developing in France, but wholesalers still play an important role in supplying restaurants.

Sales promotion

The trade fair for food products SIAL (Paris, France), held biennially, is an important outlet for promoting sales of fish and fish products. See **Annex III** for additional information on trade fairs.

Market prospects

With imports amounting to US\$ 136.7 million in 1995, France is by far the largest EU importer of lobsters.

New measures to preserve lobster stocks in EU waters will allow developing countries to increase their sales. Imports of frozen lobsters are expected to grow slightly, but those of fresh cooked lobsters and live lobsters might grow more rapidly. Developing countries should realize that high quality standards are a major market requirement to develop their exports to France; problems of diseases, transport and packaging may adversely affect their market share.

The new lobster products (e.g. terrines) on the French market may offer new opportunities to developing countries for supplying the raw materials. Live lobster will remain the major market segment for exporters in developing countries especially those having good transport facilities.

For additional information and assistance to export, exporters are suggested to contact the regional marketing information and advisory services: Infofish, Infopesca, Infopêche, Infosamak and Globefish/FAO (see **Sources of information**).

ANNEX I

Principal suppliers of lobsters to France

Value: in '000 ECU	1994	1995
Total supply	100,414	104,586
Intra-EU Arrivals	25,384	19,652
of which from:		
United Kingdom	11,440	7,776
The Netherlands	3,822	4,184
Ireland	3,289	2,953
Extra-EU Imports	75,030	84,934
of which from:		
Canada	24,988	26,954
Bahamas	18,815	17,285
USA	13,316	13,755
Cuba	8,112	10,967
Nicaragua	474	3,692
South Africa	1,085	2,057
Belize	1,849	1,491
Yemen	616	1,333
Brazil	290	1,046
Morocco	132	517
Colombia	-	426
Oman	332	422
Tunisia	487	415
Togo	172	373
Ghana	370	321

Source: EUROSTAT-COMEXT

ANNEX II**List of importers and wholesalers**

(this list is not exhaustive)

Brousse Poissonnerie
20, rue du 11 Novembre
27400 Louviers
Tel: (332) 32 40 78 33
Tlx: 180404 F
Fax: (332) 32 25 18 20

A.V.I.P.
(Agence Vente Importation Production)
17, Avenue de Métallos
Z.I. Secteur A.
B.P. 58
06702 Saint Laurent du Var
Tel: (334) 93 31 01 91
Tlx: 970483
Fax: (334) 93 07 37 55

Sud-Ouest Alimentation
154, av. de Fronton
31000 Toulouse
Tel: (335) 61 37 30 30
Tlx: 531854 F
Fax: (335) 61 13 82 27

SORIC
(Société d'Importation, Représentation,
Courtages Internationaux)
20, Av. Robert Schumann
B.P. 88
13472 Marseille Cedex
Tel: (334) 91 14 26 36
Tlx: 401718 Fruit F
Fax: (334) 91 56 13 33

CIB
(Compagnie d'importation Boulonnaise)
56, rue F. Buisson
62200 Boulogne sur Mer
Tel: (333) 21 92 07 35
Fax: (333) 21 31 13 95
Tlx: 160693 Cibou F

Pinteaux Renet
Route de Reville
50550 Saint Vaast La Hougue
Tel: (332) 33 43 20 20
Fax: (332) 33 20 39 31

IPC
(International Packers & Canners)
20, bd Robert Schumann
B.P. 88
13472 Marseille Cedex
Tel: (334) 91 14 26 36
Tlx: 401718 F
Fax: (334) 91 56 13 33

Crustimex
232, av. du Prado
13008 Marseille
Tel: (334) 91 77 91 91
Tlx: 440636 Crustim F
Fax: (334) 91 76 23 76

Adrigel France
Aéropôle - Rue C. Lindberg
Immeuble Rafale, Entrée B
44340 Bouguenais
Tel: (333) 40 05 30 44
Fax: (333) 40 75 32 54

La Surgélation Alimentaire
7, rue de Verdun
62200 Boulogne sur Mer
Tel: (333) 21 33 92 33
Fax: (333) 21 30 48 06
Tlx: 110002

Davigel SA
B.P. 41
76201 Dieppe
Tel: (332) 35 04 76 00
Tlx: 770853 F
Fax: (332) 35 40 14 31

Pomona
21, rue du Pont Neuf
75039 Paris Cédex 1
Tel: (331) 40 28 30 00
Fax: (331) 40 26 58 95

AEC
(Asiatique Européenne de Commerce)
76, bd de la République
92100 Boulogne Billancourt
Tel: (331) 46 08 41 81
Tlx: 633644 F
Fax: (331) 46 20 23 54

ANNEX III**Trade press**

Produits de la mer
13, rue du Breil
BP 6305
35063 Rennes
France
Tel: (332) 99 32 09 09
Fax: (332) 99 41 89 57

Trade fairs

PROFISH
International Seafood and
Processing Exhibition
E+E Edit Expo International
12, rue Vauvenargues
75018 Paris
Tel: (331) 42 23 13 56
Tlx: 283284
Fax: (331) 42 23 13 07
Frequency: every 3 years

PROMER
International Exhibition for Marine
Fishery Professionals
(Same address as PROFISH)
Frequency: biennial

SIAL
International Food Products Exhibition
Sial
39, rue de la Bienfaisance
75008 Paris
Tel: (331) 42 89 46 87
Tlx: 650614
Fax: (331) 42 89 46 94
Frequency: biennial

Useful addresses

ANOP
La Criée
Bureau no. 9
F-29900 Concarneau
Tel: (332) 98 97 80
Fax: (332) 98 50 70 20

Ifremer
155, rue J.J. Rousseau
92138 Issy les Moulineaux
Tel: (331) 46 48 22 70
Fax: (331) 46 48 22 76

**Union des Armateurs de la Pêche
Française**
Rue des Mathurins
75008 Paris

**FIPA (Fédération nationale du
commerce extérieur des négociants
spécialisés en produits alimentaires)**
171, avenue Victor Hugo
75116 Paris
Tel: (331) 47 27 19 06
Tlx: 649321 F

**FICUR (Fédération des industries
et commerces utilisateurs de basses
températures - congélation, surgelés,
glaces)**
3, rue de Longelbach
75847 Paris cedex 17
Tel: (331) 47 27 40 51
Fax: (331) 40 54 00 79

Ministère de l'agriculture et forêt
78-80, rue de Varenne
75007 Paris
Tel: (331) 49 55 49 55
*For information on sanitary
regulations and certificates*

Promex-PMA (Agence française pour la promotion des exportations des pays les moins avancés)
 10, avenue d'Iéna
 75016 Paris
 Tel: (331) 40 73 30 67
 Fax: (331) 40 73 39 69
 Tlx: 645412 cfce f
For export promotion from LDCs to France.

IATA (International Air Transport Association)
 Route de l'Aéroport, 33
 Case postale 72
 CH-1215 Genève
 Switzerland
 Tel: (4122) 79 92 525
 Fax: (4122) 79 83 553
For information on packaging of live animal and fish.

FEDOPA
 24, rue du Rocher
 F-75008 Paris
 Tel: (331) 42 93 59 50
 Fax: (331) 42 93 86 19

Sources of information

- EUROSTAT- COMEXT CD-Rom. Eurostat information office, Jean Monnet building, 2920 Luxembourg.
- **Produits de la mer**, no. 37, Juin-Juillet 1996. Produit de la mer, BP 6305, 35063 Rennes cedex, France .
- **The world market for lobster**, June 1995, published by Globefish.
- **Infofish Trade News**, PO Box 10899, 50728 Kuala Lumpur, Malaysia.
- **WORLD TARIFF - Guidebook on Customs Tariffs Schedules on Import Duties for the European Union**. Worldtariff, 220 Montgomery Street, Suite #432, San Francisco, California 94104-3410, United States of America.
- Infofish, Technical Advisory Service in Fish and Fishery products in Asia-Pacific Region, PO Box 10899, 50728 Kuala Lumpur, Malaysia.
- Infopesca, Centro para los Serv. de Info. Com. de Prod. Pesqueros en Am. Lat. y el Caribe, Calle Julio Herrera y Obes 1296, 11200 Montevideo, Uruguay.
- Infopêche (Afrique), Service commercial, 01 BP 1747, Abidjan 01, Côte d'Ivoire.
- Infosamak (Arab countries), PO Box 26629, Manama, Bahrain.
- Globefish/FAO, Fishery Industries Division, 00100 Roma, Italy.

EVALUATION FORM

LOBSTERS - FRANCE

1. PLEASE INDICATE HOW THIS BRIEF WAS OF USE TO YOUR ENTERPRISE.	<i>Very useful</i>	<i>Fairly useful</i>	<i>Not useful</i>						
<i>Overall rating of this market brief</i>									
<i>For taking marketing decisions</i>									
<i>For establishing market contacts</i>									
<i>For market research</i>									
<u>Comments</u> (use reverse side, if necessary):									
2. PLEASE INDICATE WHICH SECTIONS OF THIS MARKET BRIEF WERE THE MOST USEFUL. (Ranking :1 = most useful to 9 = least useful)	1	2	3	4	5	6	7	8	9
<i>a) Market characteristics</i>									
<i>b) Market access</i>									
<i>c) Prices</i>									
<i>d) Packaging</i>									
<i>e) Distribution channels</i>									
<i>f) Market prospects</i>									
<i>g) Useful addresses</i>									
<i>h) List of importers</i>									
<i>i) Statistics</i>									
3. WHAT OTHER MARKET ASPECTS SHOULD BE COVERED?									
4. WHAT IMPORT MARKETS ARE OF PARTICULAR INTEREST TO YOU?									
5. WHAT PRODUCTS WOULD YOU LIKE TO BE COVERED IN THE FUTURE?									

<i>NAME:</i>	
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<i>COMPANY:</i>	
<i>STREET ADDRESS:</i>	
<i>POSTAL ADDRESS:</i>	
<i>CITY:</i>	<i>COUNTRY:</i>
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