

The European market potential for rock lobster

The European market for rock lobster is concentrated in Southern Europe (France, Spain and Italy). These countries developed a sophisticated taste for seafood and have a fondness for specialised and niche products, such as rock lobster. Because rock lobsters are expensive, they are primarily sold to high-end retail and food service, and mostly sold frozen or fresh. As these products target a specific market, buyers' demands on quality, sustainability and traceability are high.

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1. Product description

Rock lobster (*Panulirus Argus*) is part of the crustacean family which lives in shallow waters under 50 meters in depth. They are usually found in the tropical western part of the Atlantic Ocean. In Europe, rock lobsters are not considered a common commodity, but a highly specialised product with limited availability. Therefore only a handful of exporters and importers deal with this product.

In this study, the term 'Europe' refers to the EU28, which are the [28 member countries in the European Union](#). The data used was extracted in 2019 when the United Kingdom was still part of Europe. The trade data from Trademap has combined rock lobster with other sea crawfish in one Harmonised System code. Rock lobster consumed in Europe are caught in the wild, and are imported under the following HS codes:

030611	Frozen rock lobster and other sea crawfish "Palinurus spp.", "Panulirus spp." and "Jasus spp.", even smoked, whether in shell or not, incl. rock lobster and other sea crawfish in shell, cooked by steaming or by boiling in water
030631	Rock lobster and other sea crawfish "Palinurus spp., Panulirus spp. and Jasus spp.", whether in shell or not, live, fresh or chilled
030691	Rock lobster and other sea crawfish "Palinurus spp., Panulirus spp. and Jasus spp.", whether in shell or not, dried, salted, smoked or in brine, incl. in shell, cooked by steaming or by boiling in water

Live rock lobster is considered a special seafood product, a delicacy prized for its attractiveness and freshness. Because live rock lobsters must be shipped very carefully in order to maintain their quality, they are difficult to handle and considered an exclusive product. Some European importers have special tanks to store them and monitor their temperature to limit mortality and deliver them as fresh as possible. Some restaurants even allow customers to pick a live rock lobster from the aquarium in which it is stored before cooking it.

Frozen lobster is usually shipped to Europe as lobster tails and are packed in five-kilogram trays. Four of these trays go in a master carton with a 20 kg net weight and are available in different sizes (ounces per tail). Moreover, fresh lobsters are usually packed in specially designed corrugated cartons or Styrofoam boxes. Fresh whole lobster is available in the following size ranges (by weight in grams per lobster):

- 400/600
- 600/800
- 800/1000
- 1000/1200
- 1200/1500
- 1500/2000

2. What makes Europe an interesting market for rock lobster?

Demand for lobster is higher than the supply, so there will always be a buyer for a good lobster product. However, with the onset of the COVID-19 pandemic, the consumption of rock lobster in restaurants has been especially low. And the food service sector will continue to be affected as long as lockdown or socially-distancing measures are in place. With the second wave of COVID-19 infections on the rise in Europe, the market is still hard to predict especially for the food service sector, which is likely to be down over the next few months. Despite this, in the long-term, rock lobster will always have a permanent place in high-end restaurants, which will have no issues with socially distanced service. Furthermore, more lobster is being eaten in homes, as people try to create a holiday feeling closer to home due to COVID-19, with so called “staycations”.

In Europe, rock lobsters are usually consumed during the holiday period (October to December) when people are up to spending some money on luxurious products. Rock lobsters are also highly in demand during the summer holidays when tourists are eager to spend more.

In 2019, Europe imported a total of 7,408 tonnes (valued at €166 million – slightly less than the 2018 import level, which was at 7,534 tonnes. European imports of rock lobsters are generally stable but recently, due to limited supply and increased awareness on fishery management, European buyers are becoming much pickier in the sustainability and traceability aspects of the product.

In general, Europe imports more from within Europe (4,323 tonnes) than from outside Europe (3,085 tonnes). However, since Europe is not a major producer of rock lobsters, exports from European countries are actually re-exported or traded products imported from non-European products. To illustrate, you will notice that the largest European exporters are also Europe’s largest importers of rock lobsters (Spain) or are big trading nations such as Belgium or the United Kingdom. We will dive into this later with specific information in the importing countries.

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If you are a developing country looking into exporting to Europe, frozen lobster held about 84% of the total lobster market share in 2019 (2,594 tonnes), and therefore has the biggest potential for entering the market. Live rock lobsters came in second at 15%, totalling at 488 tonnes in the same year. There is also a small amount of dried, salted and brined rock lobsters, valued at 2.7 tonnes. While frozen products dominate the European market for rock lobster, remember that each type of lobster category has its own developed market. Let's look into the specifics below:

Frozen rock lobster

In 2019, frozen rock lobster represented the largest chunk of Europe's rock lobster imports at 83.8%. European buyers prefer this type of product since they have fewer requirements than a live rock lobster in terms of handling and storage. They also have a longer shelf life. While France is the largest importer of rock lobster, the biggest importer specifically from non-European countries is Belgium, followed by Spain.

Imports from non-European countries comprise 41.7% of Europe's total imports in the same year, reaching 2,594 tonnes. Non-European exporters who dominate the frozen rock lobster category are Nicaragua (702 tonnes), Bahamas (391 tonnes), Cuba (305 tonnes) and Mauritania (164 tonnes). 2019's volume was 1,345 tonnes less than in 2016 (3,939). Europe's top importers of frozen lobster are France, Spain, Italy, Belgium and the United Kingdom.

Spain and France are the biggest markets for these products. .You can find frozen rock lobster at specialised wholesalers and in major supermarkets across these countries. [El Corte Inglés](#) in Spain and [Carrefour](#) in France are just some examples. However, for other European countries, the best chance to find frozen rock lobster is in high-end restaurants (food service).

Overall, France was the largest importer of rock lobster in 2019 with 1,876 tonnes, followed by Spain (1,019 tonnes) and Italy (863 tonnes). However, 3,616 tonnes (58.2% of the total imports) were imported from within Europe. The remaining 41.7% came from non-European countries. Take France for example, out of 1,876 tonnes it imported in 2019, only 629 tonnes (33%) are imported from non-European countries.

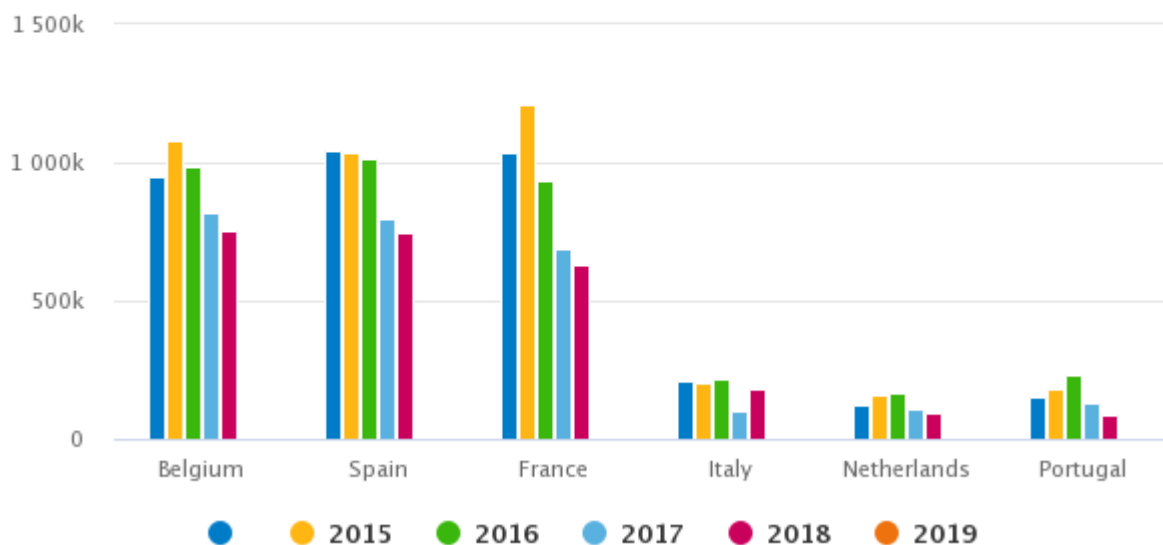
As a developing country, it is likely best to deal with countries such as Belgium and Spain, which are the top two

importing countries from non-European countries. In 2019, Belgium imported a total of 753 tonnes (93% of its total imports) from non-European countries while Spain purchased a total of 747 tonnes (73% of its total imports) from non-European countries.

Belgium is a trading country with access to many other European countries particularly in Northwestern Europe, therefore it gives you a connection to other countries too.

Figure 2: Top 6 European importers of frozen rock lobsters from non-European countries

in kg



Source: Eurostat, 2020

Tips:

Contact seafood processors from Spain or France and try to build relationships with them. Aside from retail, frozen lobster meat also ends up in the processing sector and therefore there is an opportunity to get on the European market this way.

To get your products into other parts of Europe, such as Northern Europe, it is best to check out Belgian or Dutch importers who have the connection in trading with other European nations.

Use [Google Translate](#) if you are trying to access a company website linked in this study and the website is not available in a language you are familiar with. Companies that you might be interested in may only have their websites translated into the languages that they use most often.

Fresh rock lobster

Fresh or live rock lobsters are usually sold to food service customers in high-end restaurants, mostly in seafood-loving European nations such as Spain, France, Portugal and Italy. Spain has the largest market potential when it comes to importing fresh rock lobster from non-European countries. Southern Europeans eat a lot of live seafood. Fresh or live rock lobster is mostly consumed during special occasions, such as during the Christmas period.

Europe imported a total of 1,117 tonnes of fresh lobster in 2019, of which non-European countries supplied 488

tonnes. Most of these volumes came from Morocco (184 tonnes) and Mauritania (173 tonnes). The rest came from other countries like South Africa, Venezuela or Tunisia.

Overall, the top importing countries in Europe are Spain (402 tonnes), France (302 tonnes), Portugal (153 tonnes) and Italy (95 tonnes). However, if you are a non-European country looking to tap into this market, Spain might be your best option as it imported almost all of its purchase (358 tonnes out of 402 tonnes) from non-European countries.

Spanish importers then repack and sell it, mostly as frozen, to nearby Southern European countries such as France, Portugal and Italy.

Dried/salted/brined rock lobster

As frozen and fresh rock lobsters are considered specialty products with certain requirements in handling and storage, dried and salted rock lobsters can also become a good alternative. Although the volumes imported into Europe are smaller than fresh and frozen types, imports from non-European countries grew from 1.6 tonnes in 2018 to 2.7 tonnes in 2019.

Most products, however, are intra-imports – European countries trading among themselves. In 2018, intra-imports reached 77 tonnes, which was slightly more than 2018, when they reached 70 tonnes.

Dried and salted rock lobsters are preferred by some importers due to their convenience. In 2019, the largest European importer was France (40.3 tonnes), followed by Italy (28.7 tonnes)

3. Which European countries offer most opportunities for rock lobster?

The greatest potential in the rock lobster market lies in the major seafood producing and consuming countries in Europe: France, Spain and Italy. It is also worthwhile to check trading nations such as Belgium and the Netherlands.

Remember that there is a lot of intra-trade and reselling happening in Europe, especially between Spain, France and Italy. Therefore, if you successfully penetrate these markets, there is a high chance that your products will also reach other markets in Europe.

French consumers love exclusive, high-value rock lobsters

With an affinity for expensive cuisine and exclusive, high-quality seafood products, France leads in the imports of frozen rock lobster (1,876 tonnes) in Europe and is second to Spain in the total import of fresh and live rock lobsters (302 tonnes).

In 2017, France imported a total of 2,573 tonnes of frozen rock lobster, the highest amount in the period between 2015-2019. However, due to the limited availability of these wild-caught species and a tightening of the sustainability measures, in 2019, French imports were down to 1,876 tonnes of frozen rock lobster. Out of the total imports in 2019, 629 tonnes of frozen rock lobster were sourced from non-European countries.

While import volumes are expected to slow down this year due to COVID-19 disruptions, the French market for rock lobster is here to stay in the long-term. This is a high-demand product, especially in the restaurant sector.

When dealing with French customers, sustainability and traceability are very important. They want to ensure not only the quality of the rock lobster, but also that these products are ethically sourced. As the target market in France is high-end customers in the retail and the food service industries (high-end restaurants, hotels), it is important to make sure that products are of high quality and are presented and packaged well.

Make sure of the sourcing when dealing with French customers. Some French importers even perform organoleptic tests (taste, sight, smell and touch) by independent French laboratories in order to ensure the quality of the seafood products.

Tips:

It is important to check and double-check your products before sending them out to French buyers, they can be particularly demanding.

Check out French importers [Aloha Seafood](#) and [Gelazur](#) or [Casino France](#) and retailers [Intermarche France](#) and [Carrefour](#).

Spain, a consumer and reprocessor

Like the French, Spanish people have also developed an appetite for rock lobster. In 2019, Spain was the leading importer of fresh rock lobster (402 tonnes) and came in second to France in the imports of frozen rock lobster (1,019 tonnes). Out of the 1,019 tonnes of frozen rock lobster it imported, 73% (747 tonnes) were actually purchased from non-European countries. Therefore, the Spanish market presents a huge opportunity for non-European countries in the frozen rock lobster category.

Spain also has a longstanding history of working together with Caribbean exporters. Therefore, there are already established connections for importing rock lobster, which is often then reprocessed for sale to other European countries.

Spain is a big reseller and repacker of rock lobsters. With large volumes imported from non-European countries, they are also the biggest reseller of rock lobster within Europe. Thus, trade with Spain means that you also indirectly trade with the rest of Europe. In fact, in 2019, Spain was the largest European repacker and seller of frozen rock lobster within Europe (1,094 tonnes), followed by historical trading nations such as Belgium (874 tonnes) and the United Kingdom (485 tonnes).

In 2019, Spain's largest export clients in Europe were Italy (369 tonnes) and France (353 tonnes). Spain also exported to other European countries that exporters usually have a difficulty getting into, such as Sweden (162 tonnes) and Finland (29 tonnes).

As the food service sector in Spain slowly reopens, the demand for rock lobster (especially frozen) will slowly restart as well. However, it is expected that the frozen category will bounce back faster than the fresh category due to COVID-related logistical difficulties in some exporting nations.

Tips:

Hire a translator if you do not speak Spanish in order to tap into the Spanish market more easily.

Check out some Spanish repackers and traders to know how they export/sell their rock lobster within Europe. Some repackers include [Delfin Ultracongelados](#) and [Pescafina](#) which sell frozen rock lobsters under their own brand. They are presented in premium packaging that mentions the origin of the rock lobster as shown in the photo below, which is taken from the public website of Delfin. Delfin usually imports 'bulk' boxes of 4.54 kilos of lobster tails and they repack the tails into skin pack trays of 500 grams. The repacking is suited to the customers' wishes. French customers ask for halved lobster tails (a tail cut in two).

For retail, check out [El Corte Ingles](#) and [Supercor](#) in Spain to see how they package lobsters in the

gourmet section.

Image 1:



Source: Delfin Ultracongelados, 2020

Italy's holiday lobster love

Just like the French and Spanish, Italians are also in love with rock lobsters. They came third, in terms of overall imports of frozen rock lobsters (863 tonnes) and fourth in Europe in imports of fresh rock lobsters (95 tonnes).

However, Italy sources most of its rock lobsters from within Europe, particularly from its neighbour, Spain. Of the 863 tonnes it imported in 2019, only 181 tonnes came from non-European countries. Of the live lobsters it purchased, Italy sourced 45 of the total 95 tonnes from non-European countries.

Aside from serving rock lobsters in restaurants, Italians usually consume them during expensive vacations by the sea or on cruise trips, which could present an opportunity for exports, especially during the summer holidays. Italians' appetite for rock lobster is increasing, as shown in the import volumes of the last five years, which went from 678 tonnes in 2015 to 863 tonnes in 2019.

Belgium, the most important North-European importer

Historically, Belgium does not have a huge seafood culture, unlike the Southern Europe countries. However, it is an important trade destination for frozen rock lobster. In 2019, it was the fourth-largest importer of frozen rock lobster in Europe (808 tonnes), and almost all of it was sourced from non-European countries (753 tonnes). Like other major importing countries in Europe, imports of frozen rock lobster dropped in recent years from 1,000 tonnes in 2015 down to 808 tonnes in 2019 due to limited catch and sustainability issues. Looking at long-term trends, however, the high demand from previous years ensures exporters that the demands has always been there.

Like Spain, Belgium also trades the rock lobster it buys. In 2019, France was the main destination of Belgium's rock lobster (749 tonnes) consuming almost all of Belgium's exports in Europe. France was followed by a moderate volume from the United Kingdom (88 tonnes) and the Netherlands (24 tonnes). The United Kingdom offers a promising growth in the consumption of frozen rock lobster, which increased from two tonnes in 2015 to

88 tonnes in 2019.

Re-exporters like Spain and Belgium repack rock lobster to match the requirements of other European countries, for example, cutting lobster tails in half in a “butterfly cut”. Therefore, if you are an exporter from a developing country, it is useful to study the preferences of consumers in different European countries for long-term trade and exports. By learning what your end-consumer wants, you might be able to engage in some direct trade with European buyers that are interested in these product forms, rather than going through re-processors

United Kingdom importer and re-exporter

The United Kingdom is one of the top five importers of frozen rock lobsters with 302 tonnes imported in 2019. This was more than double the total imports in 2018 (148 tonnes). However, exporters must note that most of these imports (91%) came from within Europe.

The United Kingdom is also one of the most important re-packers and re-exporters of rock lobster in Europe, like Spain and Belgium. With its own processing facilities, the country can easily repack and reprocess rock lobsters according to the demands of European buyers.

Check out [Fish Society](#), which is considered a “luxury online fishmonger” selling varieties of rock lobster in different forms and presentations. With reviews from buyers, combined with recipe suggestions and good product photography, they are able to efficiently present lobsters as the “food of the gods” as stated on their website.

Exporters looking into dealing with British resellers in the long term must also consider the United Kingdom’s exit from the European Union, especially if you want your lobster to be traded beyond the United Kingdom.

The Netherlands: an important trading nation

Like Belgium, the Netherlands is a country with a modest seafood culture. However, it is the fifth largest importer of frozen rock lobsters from non-European countries. In 2019, the Dutch purchased 92 tonnes of frozen rock lobster from outside Europe.

With port cities like Rotterdam, the Netherlands acts as a gateway to the rest of Europe. Products are transported and moved through their seaports and warehouses and on to other destinations in Europe. As a result, the demand from the Netherlands is likely to continue due to its long history of trade and delivery to the retail and food service sectors in other European countries.

Some of the important Dutch importers are [Fisherman’s Choice](#) and [Seafood Connection](#).

4. Which trends offer opportunities on the European rock lobster market?

Consumers care about sustainability

In Europe, offering sustainable products is not only an advantage, but a market entry requirement. By ensuring your rock lobsters are sustainable, you also comply with the ongoing consumer demand for sustainability and fair products. European buyers are keen to know whether your product has been caught sustainably. Securing certifications or undergoing Fishery Improvement Programs (FIP) shows the exporters’ commitment to sustainability.

Contrary to other commercialised and commodity seafood products like tuna or shrimp, rock lobsters have a limited availability worldwide. Therefore, those who are able to import it are quite “privileged”, because these products only go to a high-end niche market. But even though it is a niche market, the demand is higher than the supply. As rock lobsters fetch a high price due to their exclusivity and attractiveness, they are easily prone to overfishing and abuse. Overfishing is a major concern for rock lobster, and the method in which lobsters are

caught is a determining factor in the sustainability of the fishery. Therefore, protection of the stock, sustainable harvest procedures and management of lobster fisheries is important.

As an exporter, there are several ways to ensure that your products are sustainable. Here are some examples from other exporters. As rock lobsters are wild-caught, having a Marine Stewardship Council (MSC) certification is a huge advantage. Central American producer the Bahamas is the only country to have achieved MSC certification for their rock lobster fishery.

The Bahamas lobster fishery earned its MSC certification in 2018. The Nicaraguan rock lobster fisheries are already working on their FIP in order to achieve an MSC seal. These fisheries are fighting illegal, unreported and unregulated fishing, making sure that they follow all safety standards related to fishing rock lobsters and that they do not overfish. These two countries are the top exporters of frozen rock lobster to Europe, illustrating the strength of having a sustainable plan in your fisheries.

An example of a Nicaraguan organisation that promotes sustainability is the Nicaraguan Institute for Fisheries and Aquaculture (INPESCA), which represents a collective action from concerned companies to help Nicaraguan rock lobster fisheries attain sustainability. They have partnered with different organisations such as the World Wild Fund and other North American importers to make sure that their FIP developments are on track.

Tips:

Is your product already MSC-certified? If not, check out what [Nicaraguan](#) and [Bahamas](#) rock lobster fisheries are doing in order to improve their fisheries.

Develop a corporate social responsibility (CSR) policy in your company if you want to export to Europe. The policy should, not only tackle the environmental sustainability of your rock lobster fishery, but also its commitment to preserving the rock lobster stock (making sure the rock lobsters are available for future generations) as well as the wellbeing of the people employed in the industry.

There is a story with every rock lobster caught and European buyers also look at the story of your product before buying. Tell the story behind your product whether it's a story about sustainability, environmental protection of the species and the people working in the rock lobster fisheries.

Health and safety come first

Europe is becoming stricter in the import of its seafood products and therefore if you want to do business with European importers and retailers, you should have the standard quality and safety certifications, which include [BRC](#) or [IFS](#) quality certifications and CSR standards. Ensuring you have these safety standards covered will give you an advantage over other competing exporters who do not have these certifications yet.

The BRC Global Standard for Food Safety is developed by food industry experts from retailers, manufacturers and food service organisations to ensure the safety, integrity, legality and quality of food products. IFS works similar to BRC, in terms of ensuring the quality and safety of the product according to customer specifications.

Tips:

If you are a new exporter, make sure that you have all the mandatory certificates and standards to ship to Europe.

Europe has an alert system for non-compliance to health and safety standards, [the Rapid Alert System for Food and Feed \(RASFF\)](#), and has one of the highest food safety standards in the world. Products

that are found to be non-compliant will be registered and reported in the RASFF. Checking these alerts will give you an idea what kind of products are turned down by the EU at the border, therefore providing you with a competitive advantage.

European Union rules regarding food hygiene cover all stages of production, processing, distribution and placing on the market for all food intended for human consumption. The [standard European hygiene rules](#) can be found in the CBI buyer requirement study.

More consumers turn to home cooking

As more people turn to home cooking amid the impact of social distancing measures and the limited food service sector, more consumers are looking into experimenting with their food. As an exporter, this could be an opportunity that you can take advantage of. Communicate with your buyers regarding your ideas on packaging, presentation and marketing of your products once it enters the market.

Start with the packaging. Depending on the wishes of the customers, rock lobsters can be packaged in different ways. Frozen lobsters can be packed whole, with head and shell on, for customers who want to preserve its exquisite look. However, most European buyers usually like their lobster with the head off and, by studying the packaging in the retail sector, you can see that most rock lobster is sold as tails. As rock lobsters are an expensive specialised product, often referred to as “Queen of the Caribbean” in many Caribbean-exporting nations, few customers have access to it. But prices are not the only deterrent in buying this product, rock lobsters can also be quite intimidating to cook and prepare.

Therefore, exporters who have a lot of experience dealing and preparing this species must be able to present their product in its best form, suggesting ways to best cook and prepare it to their buyers.

Tips:

Suggest cooking methods that will best bring out the flavours of the lobster, which can help European retailers and the food service to come up with new ideas to better promote/entice consumers into buying this product. Harness the power of social media in getting some consumer following of your brand, teaching techniques on how the consumer can easily cook and prepare a gourmet meal for their families.

Check out [Caribex Seafoods](#), a good example of a company with creative and helpful suggestions to prepare rock lobsters, which are usually exported to Spain. On their website, you can see that they present their rock lobster as a product for experienced connoisseurs, naming it “Caribbean Queen”, complete with photos and recipes. Make sure that the packaging matches the exquisiteness of the product and the story behind it, such as how much care and attention is given to the product before it reaches the consumers. As rock lobster is a specialised product, it is usually packaged in the retail sector as a gourmet product.

Animal welfare becomes more important in Europe

The way that animals are being treated and the way that animal products are produced has become increasingly important in Europe. Animal welfare groups [have been fighting for a greater acknowledgement of animals’ ability to experience pain and fear](#) and that (some) animals are self-aware. This movement has been gaining ground and both governments and consumers are starting to demand better treatment of all animals, including rock lobsters. Being prepared will help you to remain competitive above other exporters and help you

anticipate future trends or regulatory changes too.

The freshness of rock lobster has traditionally been a sign of quality, leading to the popularity of live-transportation and cooking. If these methods become banned, it may open up the market for frozen rock lobster products and offer an additional opportunity to the rock lobster producers from the developing world.


There are ongoing discussions in Europe about whether lobsters, crabs or other crustaceans should be boiled alive. An article published by the European Commission concluded that [crustaceans have a certain degree of awareness, can, therefore, feel pain if cooked alive](#) and that humane killing should be applied to these species. In Switzerland, for example, a government act mandates that [crustaceans must be stunned before they are killed](#).


This new law also prohibits the transportation of live crustaceans on ice or in ice water. This is not a statutory requirement in many European countries, and has, so far, not had a concrete effect on trade. As an exporter, however, it is better to have a foresight and awareness on these issues as this might change in the future.


The study has been carried out on behalf of CBI by [Seafood Trade Intelligence Portal](#).

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