

Market Development

MARKET BRIEF ON

SNAILS

OVERVIEW OF THE EUROPEAN COMMUNITY

1993

ITC



INTERNATIONAL TRADE CENTRE UNCTAD/WTO

Snails - EC overview

Product description

CN 0307.60 Snails (excluding sea snails) live, fresh, chilled, frozen, salted, dried or in brine.

The above heading comprises the following, most commonly marketed species of edible snails of the *Helix* genus: *Helix Pomatia* Linné or burgundy snail ("escargot de Bourgogne"); *Helix Aspersa* Mueller or "petit-gris"; *Helix Lucorum* or "escargot de bois" or Turkish snail; *Eobania Vermiculata*. It also includes another variety of gastropod, the *Achatina*, which is often denominated as a snail, although not recognized by snail breeders as such. Some national regulations require that the *Achatina* name must be mentioned on all product documentation.

The *Helix* varieties are round shaped and have a weight ranging from 5 to 25 gr, and a diameter from 3 to 5 cm. The *Achatina* varieties are cone-shaped and can be far bigger (up to 300 gr in weight and 20 cm in length).

This market brief covers snails marketed with their shell or snail flesh which are both included under the above heading. Prepared snail products and snail shells, which are included with other products in CN 1605.90-10 and CN 0508.00-00 respectively, are also covered.

Production

Production statistics of live, fresh, frozen or preserved snails in the EC are not available. National legislations strictly regulate the collection of edible snails in order to protect certain species. On the other hand, there has been a significant growth of snail breeding in the EC over the past years, especially in Italy and France. According to trade sources, however, out of 35,000 tons of snails (live, fresh, frozen, prepared or preserved) consumed in the EC in 1992, only 30% were EC production. About one half of the snails marketed in the EC are frozen prepared snails or canned snail flesh. On average, 3 kg of live or fresh snails are used to produce 1 kg of processed snail flesh.

Q: metric tons	1990		1991		1992	
V. ECU '000	Q	V	Q	V	Q	V
Imports	16,963	49,793	21,729	49,100	17,197	43,474
Exports	1,567	4,789	2,360	5,225	2,906	6,261

ECU 1 = US\$
1.27
1.23
1.29

Source: Eurostat.

Main origin of imports (metric tons, 1992)

Total imports 17,197 of which: Morocco 4,778, Hungary 2,343, Turkey 1,272, Spain 1,264, Greece 1,096, Poland 1,012, Indonesia 943, Bulgaria 736, Yugoslavia 735 and Tunisia 704.

Other suppliers among developing countries include Romania, Czechoslovakia, Albania, Syria, China, Bosnia-Herzegovina, Malaysia, Algeria, Slovenia, Rwanda, Croatia, Guatemala, Senegal and Côte d'Ivoire.

Market characteristics

Snails are normally eaten as an appetizer and are served by the dozen (or even half a dozen) in restaurants. They are generally considered gourmet food and are relatively expensive. Snails are also consumed quite commonly at home, especially in France, as a traditional specialty. Consumers prefer eating snails in the shell and only to a lesser extent as snail flesh in sauces or in special cups. The demand peaks in autumn and spring, which are the seasons for collecting snails in the EC climatic zone. However, given the new advanced breeding techniques and the different origins, the product is available in any form throughout the year.

Snails are graded in six main categories according to the size of the shell as No. 14 small, No. 12 medium, No. 10 large, No. 8 very large, No. 6 extra large and No. 5 giant ("petit", "moyen", "gros", "très gros", "extra gros", "géant"). They are marketed in the EC in the following different forms depending on their origin and uses:

- ◆ Live or fresh. Of local origin (from collectors or breeders) or imported, they are marketed to the retail trade, the catering sector and, for further processing, to the food industry (snail processors).
- ◆ Fresh prepared in the shell. Of local origin or imported, they are cleaned, washed and prepared locally for cooking with a special seasoning (usually a cream of butter, garlic and parsley), and marketed to the retail trade and the catering sector.
- ◆ Frozen snail flesh. Usually imported and further processed by snail processors.
- ◆ Frozen prepared in the shell. Prepared as in the fresh form by snail processors using fresh or frozen snail flesh and marketed to the retail trade and the catering sector.
- ◆ Canned snail flesh. Of local origin or imported, it is marketed to the retail trade and the catering sector.
- ◆ Empty shells. Of the **Helix** genus, they are stuffed with snail flesh by snail processors, restaurants or final consumers.

Market access

The EC member states apply the Common Customs Tariff. Snails and snail flesh under heading CN 0307.60 and empty snails under heading CN 0508.00-00 are granted duty free access, irrespective of their origin.

Prepared or preserved snails under heading CN 1605.90-10 are subject to a conventional rate of duty of 20%. Imports of these products from Least Developed Countries (GSP scheme), ACP countries, the MagHreb and Turkey are exempt from duties.

Countries' national legislation determine rules for quality and sanitation. A health certificate issued by a public authority in the country of origin is generally required.

Distribution channels

Imported snails from specialized importers and snail processors are channelled to the catering sector and to the retail trade, direct or after they have been further processed. A list of importers and snail processors is given in annex I.

Packaging

Live or fresh snails, sorted and graded in the country of origin, are normally imported in jute bags placed in wooden crates of 20/25 kg, containing 1000-1200 *Helix Pomatia* or 2000-2500 *Helix Aspersa* snails.

Frozen prepared and canned snails are generally imported in the same packaging as they are re-marketed to the catering sector and to the retail trade. The following are the most common forms in which these snail products are sold to consumers:

Frozen prepared snails in the shell: Transparent plastic bags containing 48/50 or 96/100 snails of the *Helix* genus, the weight ranging from 200 to 600 g for the 48/50 snails bag and from 400 to 1,200 g for the 96/100 snails bag, depending on the variety. Carton boxes with window, containing a dozen snails of the *Helix* genus (50-150 g of weight). Aluminium foil dishes, containing a dozen snails of the *Helix* genus (50-150 g of weight).

Canned snails: Aluminium tins with a net drained weight of 1 kg, 500, 250 or 125 g.

The empty snail shells are sterilized, dried, graded and packed in cartons of 4-6 kg. They are sold in the retail trade in transparent plastic bags containing 6-10 dozens of shells.

Trade promotion

A number of specialized exhibitions on food products are taking place in the EC throughout the year. Participating or visiting these exhibitions can prove very useful for establishing business contacts. (See Useful addresses.)

Market opportunities

According to trade sources, the EC market for snails increased by 3 to 4% per year (in terms of volume/consumption) over the last decade.

Imports from non-EC countries have been stabilizing owing to the increasing offer of snail bred within the EC. The use of modern and sophisticated breeding techniques has permitted to offset the progressive disappearance of local wild snails. Also, various domestic species of snails are protected by major EC consuming countries' national regulations. However, the EC market for snails remains heavily dependent on imported products from non-EC countries. Therefore, new suppliers can still find their market "niche" by offering a high quality product, regular supply and efficient service.

Exporters of the **Achatina** varieties from the tropical regions can also find good market opportunities given the increasing acceptance of this product which has established its share (about 5%) within the sector.

Sources of information

- ◆Eurostat, Statistics of the European Communities, Brussels
- ◆International Customs Tariffs Bureau, Brussels
- ◆Largo Consumo (various issues 1990-91-92), Milan
- ◆FAO, Manual on snail breeding 1988, Rome

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Snails - France

Production

Statistics on French production of snails are not available. According to trade sources, however, some 3,000 tons of live or fresh snails per year were produced in France, on average, during the last three years. Production of processed snail products (including re-processing of imported snails) amounted to 8,000 tons per year during the same period.

Imports and exports

V: ECU '000	1990		1991		1992	
Q: metric tons	Q	V	Q	V	Q	V
Imports	5,501	23,739	4,829	20,435	5,078	24,674
Exports	163	835	202	889	117	551

Source: Eurostat.

Main origin of imports (ECU '000, 1992)

Total imports 24,674 of which: Greece 7,306, Turkey 6,433, Germany 3,271, Hungary 2,149, Poland 1,926 and Indonesia 1,577. Other suppliers among developing countries include Romania, Czechoslovakia, Bulgaria, Albania, Tunisia, China, Syria, Malaysia, Algeria, Guatemala, Senegal and Côte d'Ivoire.

Market characteristics

With an estimated consumption of 14,000 tons per year, France is the world's largest consumer of snails. The French tradition of eating snails or "escargots" has strongly influenced the world snail market to the point that the denomination of the various species (apart from their Latin name), grading criteria and methods of preparation and cooking, are the same in many parts of the world as those in use in France.

A dozen or half a dozen of snails "à la Bourguignonne" (stuffed with butter, garlic and parsley) is a typical "entrée" in the menu of many French restaurants.

Eating snails is also a tradition at home in France. Canned snail flesh and frozen prepared snails, ready available throughout the year in French supermarkets, cover approximately 90% of the retail market. Live and fresh products are mostly directed to snail processors.

French consumers prefer to eat snails in the shell. There is an important market for empty shells to be filled with snail flesh, either canned or frozen. The share of frozen prepared products (ready for cooking) is rapidly increasing.

The **Helix Pomatia** and **Helix Aspersa** varieties are by far the most in demand, especially of the sizes No. 8 (very large or "très gros") and No. 10 (large or "gros"). The tropical varieties **Achatina** have a small (6% to 8%) market share.

Demand for snails peaks in autumn and during the Christmas period.

Distribution channels

The large majority of imports of live and fresh snails come through the food industry. Snails, after having been processed, are marketed direct or through wholesalers to retail outlets and the catering sector in the form of frozen prepared snails and canned snail flesh.

Frozen snails and frozen snail products are imported by firms that specialize in frozen products. These firms distribute direct or through wholesalers to retailers and the catering sector.

Prices

Prices for imported fresh or live snails of the varieties *Helix Aspersa* or *Helix Pomatia* range from FF 15 to FF 30 per kg. Import prices for frozen snail flesh of the same varieties range from FF 30 to FF 50 per kg.

Wholesale price for canned snails range from FF 35 to FF45 for a 1/2 litre tin containing 4 to 6 dozens of snails of the *Helix* genus.

Market opportunities

With imports amounting to 5,078 tons, worth ECU 22.6 million, France was the largest EC importer of snails in 1992. The consumer's marked preference for high value species such as *H. Aspersa* and *H. Pomatia* is reflected in the value of imports, almost five times higher than that of Italy, the second largest EC market by value. High quality species will continue to be in great demand, although market demand, and hence prices, are expected to remain stable. Prospects are favorable for new exporters able to meet strict market requirements and to compete with well-established traditional suppliers.

Sources of information

- ◆Eurostat, Statistics of the European Communities
- ◆Contacts with traders and market experts

Snails - Italy

Production

Italy has a very well developed snail-farming sector which uses the world's most advanced techniques of biological breeding of snails. There are approximately 6,000 snail farms whose production, on average, amounted to 2,000 tons (900 tons of H.Asperosa, 500 of H.Pomatia, 200 of H.Lucorum and 400 of other species) of snails per year during the last three years. Three large snail farms, located in central Italy, account for nearly one half of the national production.

Imports and exports

V: ECU '000	1990		1991		1992	
Q: metric tons	Q	V	Q	V	Q	V
Imports	1,663	6,955	1,745	7,200	1,337	5,881
Exports	27	113	35	105	14	39

Source: Eurostat.

Main origin of imports (ECU '000, 1992)

Total imports 5,881 of which: Tunisia 4,442, Turkey 507, Yugoslavia 396, Greece 227 and Poland 100. Other suppliers among developing countries include Romania, Hungary, Slovenia, Croatia, Czechoslovakia, Albania and Rwanda.

Market characteristics

The Italian market for snails has expanded significantly over the past decade. Between 1982 and 1992, consumption (estimated at 7,200 tons in 1992) has tripled. This does not take into account the large quantities of snails consumed by private collectors, therefore not entering the traditional commercial channels.

However, according to trade sources, only 40% of Italians have eaten snails at least once in their lifetime and only 10% are systematic consumers. The product, although popular in some exclusive restaurants, is not yet largely diffused in the menu of Italian families. This is due to the scarce knowledge of cooking methods (the product is believed to be difficult to prepare) and to an inadequate distribution network, which only supplies snails to major towns.

Italian consumers demand a high quality fresh product. Live or fresh snails account for 80% of the market.

Differences in consumption and demand are substantial between the different geographical regions of the country. The demand for live or fresh snails is higher in central and southern Italy, whereas frozen or prepared snails are more readily accepted in the northern regions.

Distribution channels

Specialized importers/wholesalers distribute the imported products to retailers. Snail processors, as well as large retail chains, are increasingly involved in import operations.

Live or fresh snails are generally distributed through fresh fruit and vegetables' wholesalers. Frozen and prepared snails are distributed alongside other frozen and prepared products.

Prices

The following are, on average, 1993 import prices for snails (Italian Lire per kg):

Species	Fresh	Frozen Flesh
Helix Pomatia	4,000-10,000	8,000-12,000
Helix Aspersa	6,000- 7,000	12,000-14,000
Eobania Vermiculata	3,000- 4,000	

Empty shells were imported at ITL 6,000 per kg, on average.

Market opportunities

With imports totalling ECU 5.8 million in 1992, Italy was the second largest EC importer of snails by value after France, and the fourth by weight (1,337 tons imported) after France, Spain and Greece, respectively.

According to trade sources, total imports of snails, including preserved and prepared snails (not covered separately by custom codes and trade statistics), amounted to approximately 5,000 tons per year during the period under review.

Despite the rapid expansion of the Italian snail farming sector, the market continues to rely heavily on imports (nearly 70% of domestic consumption) and the demand for the product is expected to continue to grow. Prospects are therefore good for new suppliers in developing countries able to meet the strict quality requirements of the Italian snail market.

Given high labor costs of domestic production, there are also good prospects for joint-ventures with various Italian snail importers and breeders. Inquiries can be addressed to the Italian Association of Snail Breeders (see Useful addresses).

Sources of information

- ◆Eurostat, Statistics of the European Communities, Brussels
- ◆Largo Consumo, monthly magazine (various issues), Milan
- ◆A.N.E., Associazione Nazionale Elicicoltori
- ◆Contacts with traders and market experts

Snails - Greece

Production

Statistical data on production of snails and snail products in Greece are not available. According to trade sources, however, approximately 600-650 tons of snails were produced, on average, per year, during the period 1987-1992, of which 500 tons were produced in Crete and the remainder in the Peloponnese region.

The more popular locally produced varieties are the **Helix Aspersa** and the **Eobania Vermiculata** (a variety of the Helix genus).

Imports and exports

V: ECU '000	1990		1991		1992	
Q: metric tons	Q	V	Q	V	Q	V
Imports	4,420	13,375	8,391	13,835	4,071	5,748
Exports	297	1,311	255	1,052	293	1,241

Source: Eurostat.

Main origin of imports (ECU '000, 1992)

Total imports 5,748 of which: Hungary 2,427, Bulgaria 669, Yugoslavia 497, Poland 374, Turkey 303, Romania 234 and Albania 123.

Market characteristics

The following is an overview of the Greek market for snails.

Form	Species	Origin		Destination		
		Local	Imported	Exports	Retail	Processing
Fresh	H. Pomatia		100%		5%	95%
	H. Aspersa	100%		45%	35%	20%
Frozen	H. Lucorum	20%		15%	5%	80%
	E. Vermiculata	100%			100%	
Preserved	H. Pomatia		100%			100%
	H. Lucorum		100%			100%
	Achatina		100%			100%

The above table shows that most snails and snail products marketed in Greece are directed to the food processing industry, especially preserved snails of foreign origin. After having been processed, they are sold as prepared snails to the retail trade and the catering sector or exported (or re-exported depending on their origin). However, locally produced varieties such as the **Eubania Vermiculata**, and to a lesser extent the **Helix Aspersa**, are marketed directly to the retail trade and the catering sector, either fresh or frozen.

Domestic consumer demand has considerably evolved in recent years. Snails are no longer solely used for private consumption, but are becoming increasingly popular in restaurants, often served as a gourmet delicacy.

Distribution channels

The food processing industry accounts for the largest share of imported snails and deals direct with the foreign suppliers. Four major snail processors dominate this sector. Specialized importers distribute the product direct to the retail trade as well as to the catering sector. Locally produced snails are channelled through wholesalers from producers to traditional food stores or direct to supermarkets.

Prices

The following table indicates some current market prices (import or producers' prices, in US\$ per kg) for snails in Greece in 1993.

<u>Form</u>	<u>Species</u>	<u>Origin</u>	<u>Price</u>
Live	H. Aspersa	Local	1.14
	H. Lucorum	Local	1.14
Frozen	H. Pomatia	Imported	1.82
	H. Pomatia	Imported	2.10
Flesh, frozen	H. Pomatia	Imported	10.90
Flesh, canned (a)	H. Pomatia	Imported	7.00
Flesh	Achatina	Imported	1.40

(a) In 1 litre tins containing 500g (net drained weight) of the product.

Market opportunities

With imports totalling ECU 5,748 (about US\$ 7.6 million) in 1992, Greece was the third largest importer of snails by value in the EC after France and Italy. Greece was also the third largest EC importer, after France and Spain, in terms of quantity (4,071 tons imported). However, owing to the varying level of local production, during the period under review, imports widely fluctuated.

Greek snail processors depend heavily on foreign suppliers who offer good quality snails at competitive prices. Moreover, the share of imports by specialized importers/wholesalers who supply direct to restaurants and retailers is expected to increase. Prospects are also favourable for those exporters offering snails and snail products for immediate consumption, particularly H.Pomatia and H.Aspersa.

Sources of information

- ◆Eurostat, Statistics of the European Communities, Brussels
- ◆National Statistical Service of Greece, Athens
- ◆Contacts with traders and market experts

Useful addresses

Food and Agricultural
Organization of the United
Nations (FAO)
Via delle Terme di Caracalla
00100 Rome, Italy
Tel: 6-52251
Tlx: 625852 fao i
Fax: 6-522531

ANE. Associazione
Nazionale Elicicoltori
(Italian Snail Breeders
Association)
Via V. Emanuele
12062 Cherasco (CN), Italy
Tel: 172-489382

List of specialized trade fairs

ALIMENTARIA
Feria de Barcelona
(*Biennial, even years*)
Avda. Reina M. Cristina
08004 Barcelona, Spain
Tel: 3-4233101
Fax: 3-4238651

ANUGA
Koln Messe
(*Biennial, odd years*)
Postfach 210760
5000 Cologne 21, Germany
Tel: 221-8210
Fax: 221-8212574

EXPO FOOD
Expo Cts
(*Annual*)
Via Serbelloni, 2
20122 Milan, Italy
Tel: 2-77181
Fax: 2-781828

SIAL
(*Biennial, even years*)
39, rue de la Bienfaisance
75008 Paris, France
Tel: 1-42 89 46 87
Fax: 1-42 89 46 94

List of importers and snail processors (non-exhaustive)

France

Chantifrais SA
71, chemin du Moulin Carron
69570 Dardilly
Tel: 78 47 57 69
Tlx: 900659

Direct Import
36, rue Oberlin
67000 Strasbourg
Tel: 88 36 88 18
Fax: 88 36 00 71

Cotral
40, rue du Séminaire
94616 Rungis
Tel: 1 46 75 92 24
Fax: 1 46 75 00 57

Escargots Willm
26, rue Dr. Sultzer
67140 Barr
Tel: 88 08 94 55
Fax: 88 08 41 10

Dehais Claude SA
Route de Vatis
76050 St. Jean du Cardonnay
Tel: 35 33 83 54
Fax: 35 33 46 38

Ugma SA
192, avenue de Strasbourg
67170 Brumath
Tel: 88 51 95 95
Fax: 88 68 39 06

Gandjean SARL
Route de Bourg
01750 Replonges
Tel: 85 31 02 55
Tlx: 340798

Jacot et Billey
19, route de Meziere
25490 Fesches le Chatel
Tel: 81 93 00 41
Fax: 81 96 18 24

Les Escargots des
Gourmet
10, Villa Laugier
75017 Paris
Tel: 1 42 27 91 95

Les Fils d'Omer Romanzini
25, rue d'Arlin
25560 La Rivière Drugeon
Tel: 81 89 73 04
Fax: 81 49 87 20

Malartre Conserves
74, chemin de la Mouche
69230 St.Genis Laval
Tel: 78 51 23 49
Fax: 78 50 71 08

Marechaux Douville et Cie
7, rue du Louvre
75001 Paris
Tel: 1 42 33 96 40
Fax: 1 40 41 06 09

Saupiquet Cie
128, bd Jules Verne
44075 Nantes
Tel: 40 49 11 42
Fax: 40 50 21 24

SACAP
Zone industrielle
06701 St. Laurent du Var
Tel: 93 07 07 88
Fax: 93 07 09 74

Bourgogne Escargots SA
1, rue Jean Mamet
21800 Chevigny St. Sauveur
Tel: 80 71 06 66
Fax: 80 71 06 68

Ets Gillot
Valentigney
10500 Brienne le Château
Tel: 25 92 96 05
Fax: 25 92 63 50

Rougié SA
Z.I. Madrazes
24200 Sarlat-la-Caneda
Tel: 53 31 72 00
Fax: 53 59 40 86

Bontout SA - La Dauphinoise
18, avenue de Provence
26600 Pont-de-l'Isère
Tel: 75 84 68 88
Fax: 75 84 68 90

Menu de France
Avenue de Mougères
34720 Caux
Tel: 67 98 42 41
Fax: 67 98 42 41

Menetrel et Cie
Foucherans
39100 Dole
Tel: 84 82 13 10
Fax: 84 82 47 50

Castaing et Fils
Route de Bayonne
40500 Saint-Sever
Tel: 58 76 02 10
Fax: 58 76 17 48

Billot SA
118, Grande Rue
89400 Bassou
Tel: 86 73 21 12
Fax: 86 73 23 96

CGC
5, rue Louis Lejeune
92128 Montrouge
Tel: 1 46 57 49 49
Fax: 1 40 92 08 61

Miko SA
Rue Lamartine
52111 St. Dizier
Tel: 25 05 91 23
Fax: 25 56 56 29

Greece

Piltsi SA
Florina
Edessa
Tel: 381-31 295
Fax: 381-31 240

Canning Industry of Crete
Venerato
Iraklion
Tel: 81-791 467

Olimpex Co.
26, Verias Ionia
Thessaloniki
Tel: 31-781 659

Petsalakis
36, Archimedes Street
Iraklion
Tel: 81-222 212

Prisnalis SA
Akrolimni
Kria Vrisi
Pella
Tel: 382-61 930
Fax: 382-63 355 Fax: 381-81 176

Saligar SA
Sevastiania
Skydra
Pella
Tel: 381-89 982

Italy

Euro Helix
Via S.Iffredo, 1
12062 Cherasco (CN)
Tel: 172-489382

Quabas Spa
Loc. Vallone
29010 Castelvetro (PC)
Tel: 523-823841
Fax: 523-824454

Bertolini Spa
Via Isonzo, 21
34070 Mossa (GO)
Tel: 481-809091
Tlx: 460494

F.Ili Buiatti Snc
Via del Tei, 7
33040 Moimacco (UD)
Tel: 432-722118

B & C Sdf
Fraz. Pellegrina
37063 Isola della Scala (VR)
Tel: 45-7330179 Tel: 30-221301

Arici Savino
Via Lombardia, 34
25100 Brescia

Sources of information

- ◆ Kompass, Register of Industry and Commerce (France 1993 and Italy 1993)
- ◆ CD-EXPORT, Telexport/France, CERVED/Italy and ICEX/Spain
- ◆ Anuga Catalog 1993, KoelnMesse, Cologne
- ◆ M+A, Publisher for Fairs, Exhibitions and Conventions, Frankfurt