



Market and Trade Data

More Than a Fish Story: France a Swelling Market for U.S. Seafood Suppliers

By Marie-Cécile Hénard

France is a major import market for seafood because demand significantly and consistently exceeds domestic supply. In calendar 2006, French fish product imports (including fish oils and animal feed) totaled \$5.03 billion, while exports were \$1.61 billion, for a seafood trade deficit of \$3.42 billion, up 15 percent from 2005. The United States, with a 4.7-percent market share, was France's seventh largest supplier in 2006, after the United Kingdom, Norway, Spain, the Netherlands, Denmark, and Madagascar.

Of Consumers and Competitors

French annual per capita consumption of seafood is 35.1 kg (1 kilogram = 2.2046 pounds), live weight equivalent. French seafood consumption totaled 844,982 metric tons in 2005, of which 71 percent was consumed in households and 29 percent in the HRI (hotel, restaurant, and institutional) sector.

Salmon: Salmon is French consumers' favorite finfish and is consumed fresh, frozen, and smoked. As France has one of the highest salmon consumption rates in Europe and marginal production, it relies on imports for almost all supplies.

France's largest salmon suppliers are Norway (with a 52-percent market share in 2006) and the United Kingdom (22 percent). The U.S. share was 3.5 percent last year, mostly in the form of frozen fillets for the HRI sector.

Groundfish fillets (cod, haddock, pollock, whiting, and hake): These varieties are also popular in the French retail and HRI sectors, in whole, cuts, fresh, frozen, and breaded formats.

In 2006, the United States was France's second largest supplier of frozen fillets of Alaska pollock, with 28 percent market share, after China (40 percent market share). Chinese and Russian exports to France increased significantly in 2006, more than the United States, mainly because of their lower supplies.

Lobster: France's HRI sector provides most of the demand for lobster. A luxury product not often prepared at home, it is principally consumed in December during the holiday season. The United States is France's largest supplier of lobster, with Canada the closest competitor. U.S. lobster is mainly imported fresh, while Canadian lobster is mainly frozen.

Scallops: France is the largest market for scallops in Europe. Although scallops are traditionally a festive product principally consumed in December, the increasing availability of frozen products is making consumption more consistent throughout the year. The market is segmented as follows:

- small-grade frozen products for processing,



Fish open market

Photo courtesy of FAS Office of Agricultural Affairs, Paris, France

- frozen products with or without roe for food service,
- frozen products for the retail sector consisting mainly of supermarkets and frozen food centers (these are a unique concept of retail stores selling only frozen foods from entrée/hors d'oeuvre to desserts, including fish and seafood), and
- fresh products for restaurants and vendors at open street markets or specialized seafood shops.

The United States has been France's largest supplier of scallops for the past few years. In 2006, the U.S. market share was the highest recorded, at almost 21 percent. Most U.S. scallops exports to France are frozen, but quantities of fresh scallops have increased in the past few years, reaching 37 percent of U.S. scallop shipments in 2006. Argentina is the leading U.S. competitor, with a 17-percent market share in 2006.

Surimi: A paste made of white fish such as hake or pollock and processed in other products, surimi is popular in the form of sticks, snacks, and imitation crabmeat. In 2005, French surimi

consumption was 97 percent fresh products and 3 percent frozen products. Surimi sticks continued to hold 80 percent of the market. The snacking market segment experienced the highest increase in value.

The United States remained by far France's largest supplier of surimi base in 2006, with 58 percent of the market. Nevertheless, U.S. exports declined due to higher prices of Alaska Pollock, making U.S. surimi base more expensive than Chilean products. ■

Marie-Cécile Hénard is an agricultural specialist with the FAS Office of Agricultural Affairs, Paris, France. E-mail: agparis@usda.gov

e-Sources
FAS Paris: Source of Market Assistance and Information
<p>The FAS Office of Agricultural Affairs in Paris, France, can help U.S. suppliers interested in this market. For assistance, contact the office at: E-mail: agparis@usda.gov</p> <p>For more information on the French market for U.S. fish and seafood, visit the office's website: http://www.amb-usa.fr/fas/fas.htm</p>
Trade Show Key to Marketing U.S. Seafood
<p>The European Seafood Exposition, held annually in Brussels, Belgium, is Europe's leading seafood show. For information on this show, visit: http://www.euroseafood.com</p>

FAS Worldwide is an online magazine from USDA's Foreign Agricultural Service. Text of this magazine is in the public domain and may be reprinted freely. Photographs may not be reprinted without permission.

Use of commercial and trade names does not imply approval or constitute endorsement by USDA or by FAS.

The U.S. Department of Agriculture (USDA) prohibits discrimination in all its programs and activities on the basis of race, color, national origin, age, disability, and where applicable, sex, marital status, familial status, parental status, religion, sexual orientation, genetic information, political beliefs, reprisal, or because all or part of an individual's income is derived from any public assistance program. (Not all prohibited bases apply to all programs.) Persons with disabilities who require alternative means for communication of program information (Braille, large print, audiotape, etc.) should contact USDA's TARGET Center at (202) 720-2600 (voice and TDD). To file a complaint of discrimination, write to USDA, Director, Office of Civil Rights, 1400 Independence Avenue, S.W., Washington, D.C. 20250-9410, or call (800) 795-3272 (voice) or (202) 720-6382 (TDD). USDA is an equal opportunity provider and employer.