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France

Fishery Products

French Market for Surimi Rising

2002

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Report Highlights:

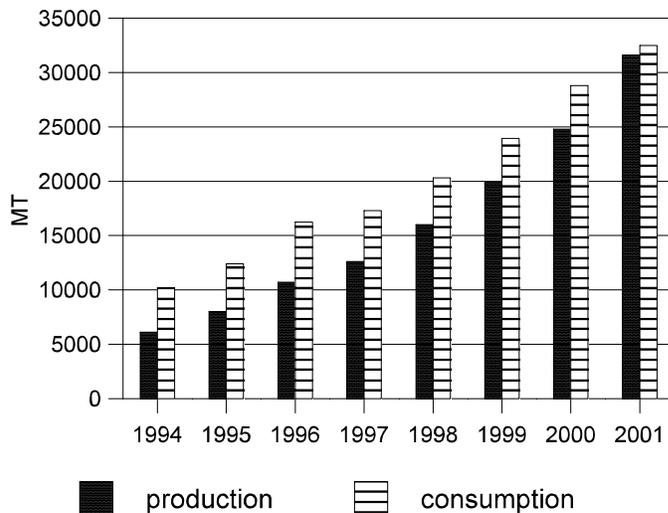
France has two markets for surimi: one for surimi base (raw material), and one for prepared surimi products. From 1994 to 2001, French surimi consumption has tripled from 10,200 MT to 32,500 MT. Although domestic production has increased significantly in the past few years, it has always been lower than consumption, resulting in strong import demand. In 2001, French surimi imports were 17,220 MT, including 65 percent surimi base and 35 percent prepared surimi products. In 2001, the United States was France's leading supplier of surimi base, with 64 percent of the market. The United States mainly competes with Chile and Denmark on the French market for surimi base. Thailand, South Korea and China are France's leading suppliers of prepared surimi products.

Includes PSD changes: No
Includes Trade Matrix: No
Unscheduled Report
Paris [FR1], FR

1. French Surimi Consumption has Significantly Increased Since 1994

According to the French surimi development association (ADISUR), French domestic consumption has tripled from 10,200 MT in 1994 to 32,500 MT in 2001. Since 1994, the average annual increase in domestic consumption has been 19 percent. In response to rising demand for surimi products, domestic production of surimi went up to 31,600 MT in 2001. However, surimi production has always been lower than consumption.

French Surimi Production & Consumption

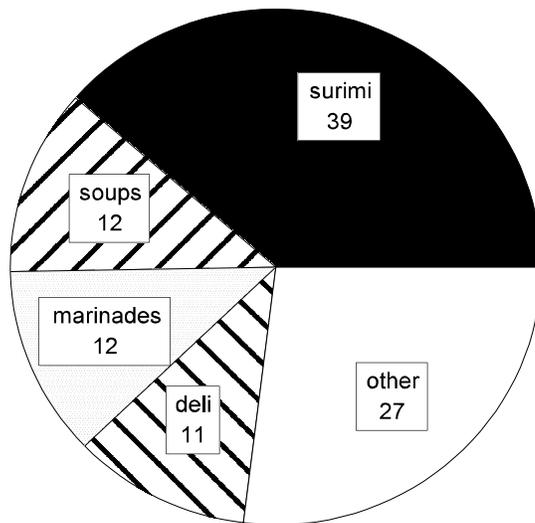


2. Surimi leads the Catered/Prepared Seafood Segment in 2001

The first estimates recently published for CY 2001 indicate that surimi has maintained its leading position on the French market for catered seafood products.

According to the French seafood board (OFIMER) and the consumer survey agency AC Nielsen, the French catered seafood market was 58,964 MT in 2001 (up 10.8 percent from 2000), and amounted to €592 million. The largest segment of this market was surimi, with 39 percent, as illustrated in the graph below.

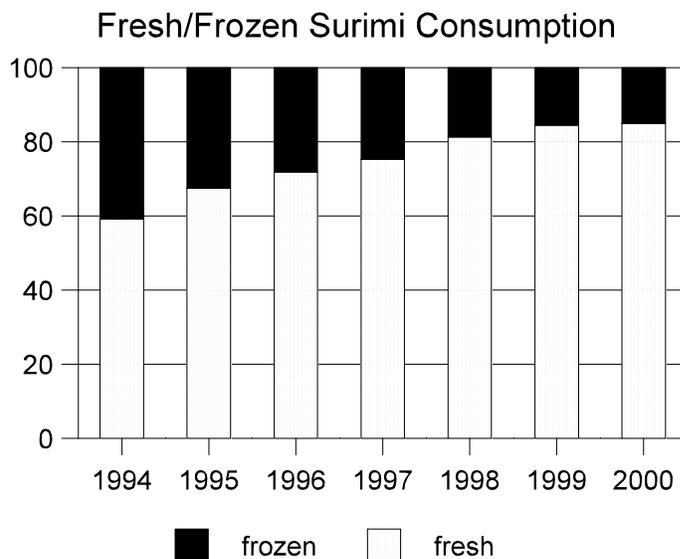
Catered Seafood (58,964 MT)



Note: the "other " category mainly includes soups

3. Market Segmentation:

In France, surimi is mainly and increasingly consumed fresh, as indicated in the graph below:



In 2001, supermarket sales of fresh surimi increased by 20 percent in volume to 23,820 MT, and by 15 percent in value to 204 million Euros. Surimi sales under supermarket brands accounted for 55 percent of the market in volume and 47 percent in value. The leading brands are Fleury Michon (processed by the Fleury Michon company) and Coraya (processed by the Cuisimer company, which is a subsidiary of the Bongrain group).

In 2001 and 2002, Fleury Michon and Cuisimer launched new surimi products: Cuisimer's innovations were a microwavable breaded surimi, to be consumed hot, and small surimi sticks sold with a sauce, for snacking. Fleury Michon's new products are surimi products portioned in plastic trays usually used for selling meat and poultry cuts in grocery stores, and snacking surimi balls stuffed with cheese. Also, Fleury Michon labeled some of its surimi products with "prepared with wild fish" and "naturally high protein content."

The French company Comapêche is the leading European company involved in the entire surimi process, from catching fish to processing surimi base and preparing the final product. Its production capacity is 9,000 MT of final products per year. Comapêche prepared surimi products are distributed through frozen food centers such as Picard and Thiriet, or private labels, or into the HRI sector. Fresh surimi sticks represent 70 percent of Comapêche's production, and the remainder includes surimi steaks with cheese, and pasteurized surimi sold in plastic trays with a 21-day or 70-day limit of consumption.

4. The United States is France's Leading Supplier of Surimi

Although in 2001 there was no French imports of prepared surimi from the United States, the United States was the major supplier of surimi base (see table below). The United States' leading competitors on the French market for surimi base are Chile (13 percent) and Denmark (9 percent). In 2001, France's leading suppliers of prepared surimi products were Thailand, South Korea and China.

French imports of surimi were broken down as follows in CY 2001:

Country of Origin	Surimi Base 03049005	Prepared Surimi 16042005	Total
United States	7,128	0	7,128
Thailand	18	1,730	1,748
Belgium	34	1,620	1,654
Chile	1,448	0	1,448
South Korea	0	1,286	1,286
China	0	1,232	1,232
Denmark	1,023	0	1,023
Argentina	977	0	977
Peru	327	0	327
Others	188	209	397
Total	11,143	6,077	17,220

Source: Eurostat