Foreign Agricultural Service
GAIN Report
Global Agriculture Information Network

Required Report - public distribution

Date: 10/10/2001

GAIN Report #FR1069

France

Fishery Products

Annual

2001

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Report Highlights:
The French seafood market reached 760,280 MT in 2000, including 206,000 MT for hotels, restaurants and institutions (HRI) and 554,280 MT for household consumption. The best market opportunities for U.S. seafood are principally for salmon and surimi. The French market for salmon is large and mature. While salmon was considered a delicacy in the past, retail prices declined significantly in the past decade with increased world production, and salmon became French consumers' favorite specie. In contrast, the market for surimi is young and expanding quickly, since surimi is a healthy and easy to prepare product. In 2000, the United States supplied 7 percent of the French market for fresh and frozen salmon, and 46 percent of the French market for surimi.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
Annual Report
Paris [FR1], FR

Executive Summary

The French seafood market reached 760,280 MT in 2000, including 206,000 MT for hotels, restaurants and institutions (HRI) and 554,280 MT for household consumption. The best market opportunities for U.S. seafood are principally for salmon and surimi. The French market for salmon is large and mature. While salmon was considered a delicacy in the past, retail prices declined significantly in the past decade with increased world production, and salmon became French consumers' favorite specie. In contrast, the market for surimi is young and expanding quickly, since surimi is a healthy and easy to prepare product. In 2000, the United States supplied 7 percent of the French market for fresh and frozen salmon, and 46 percent of the French market for surimi.

Section I: Situation and Outlook

France is a net importer of seafood, as domestic demand is higher than production. In 2000, the seafood market in France was 760,280 MT, including 206,000 MT of fishery products consumed in Hotels, Institutions and Restaurants (HRI) and 554,280 MT purchased by French households, principally in supermarkets (67 percent). During the first half of 2001, French household consumption increased by 4 percent from the same period in 2000. This resulted from the "mad cow" crisis, which resulted in reduced beef consumption, which was partially replaced by pork, poultry and seafood.

French households seafood purchases amounted to USD 4.03 billion in 2000. The leading categories are fresh products (29 percent), frozen products (21 percent) and canned products (16 percent).

Market opportunities in the French seafood market exist principally for salmon and surimi. The French market for salmon is a large and mature market: salmon has been the French consumers' favorite specie for several years. While salmon was a delicacy a decade ago when prices were high, the significant increase in world production (mainly due to the development of farmed salmon in Norway) reduced prices and salmon is now available for most French households. This market represented USD 483 million in 2000 (excluding HRI), including smoked salmon (USD 253 million) and fresh salmon (USD 175 million). The United States is a major supplier of salmon to France (7 percent in 2000), but faces stiff price competition from Norway, which is the world's leading salmon producer and exporter, and Scotland, which provides the French market with high quality "Label Rouge" salmon. French salmon smokers prefer to process fresh salmon. Norwegian and Scottish products are generally imported fresh, while salmon from the U.S. is usually imported frozen. However, French consumers are increasingly sensitive to animal welfare and animal feed composition, and this is likely to reduce their interest for farmed salmon (in Norway and Scotland) to the benefit of wild salmon (in Alaska), provided that they are aware of the distinction in breeding in the various countries that supply salmon to the French market. The market for canned salmon is growing in France, and the United States is its leading supplier, with 20 percent in 2000. However, the market value for canned salmon remains well below that of fresh, frozen and smoked salmon.

The French market for surimi in 2000 amounted to USD 150.8 million (excluding HRI), with 94 percent being for fresh surimi and 6 percent for frozen surimi. Smaller than the salmon market, the market for surimi is younger but it is expanding quickly: from 1999 to 2000, it increased by 20 percent in volume and 18 percent in value. This is due to the fact that surimi meets French consumer demand for healthy and easy to prepare products. The United States is France's leading supplier of surimi (mostly surimi-base products), with 46 percent of the market in 2000. In this market, French domestic production, which is also expanding quickly (25 percent up in 2000 from 1999), is in direct competition with imported products from the United States and other suppliers.

French household consumption of lobster amounted to USD 36,000 in 1999. The United States is France's leading supplier of lobster, with 28 percent of the market in 2000, and directly competes with Canadian lobster and spiny lobster imported from Cuba and the Bahamas. Finally, U.S. market share for monkfish and dogfish is high in France. In 2000, the United States supplied 10 percent of the French market for monkfish and 45 percent of the French market for dogfish.

Note: an overview of the French seafood economic sector can be found on the websites of the French seafood board (OFIMER) and the French Ministry of Agriculture and Fisheries (MinAg):
http://www.ofimer.fr
http://www.agriculture.gouv.fr

Exchange rates used in this report are as follows:

1999: 1 USD = 6.10 FF
2000: 1 USD = 7.13 FF
2001 (Jan-Sept): 1 USD = 7.30

Section II: Statistical Tables

PS&D Tables

PSD Table						
Country	France					
Commodity	Salmon, Whole/Eviscerated				(MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2001		01/2002
Beginning Stocks	32459	32459	32161	32000	30863	32000
Total Production	2	2	2	2	0	2
Intra-EC Imports	40000	84499	40000	85500	0	85500
Other Imports	70000	7133	70000	8000	0	8000
TOTAL Imports	110000	91632	110000	93500	0	93500
TOTAL SUPPLY	142461	124093	142163	125502	30863	125502
Intra-EC Exports	6000	2587	7000	2800	0	2800
Other Exports	300	320	300	350	0	350
TOTAL Exports	6300	2907	7300	3150	0	3150
Domestic Consumption	100000	85186	100000	86352	0	87352
Other Use/Loss	4000	4000	4000	4000	0	4000
TOTAL Utilization	104000	89186	104000	90352	0	91352
Ending Stocks	32161	32000	30863	32000	0	31000
TOTAL DISTRIBUTION	142461	124093	142163	125502	0	125502

PSD Table						
Country	France					
Commodity	Salmon, Canned				(MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2001		01/2002
Beginning Stocks	0	0	0	0	0	0
Total Production	0	230	0	300	0	330
Intra-EC Imports	0	777	0	780	0	785
Other Imports	0	1109	0	1130	0	1150
TOTAL Imports	0	1886	0	1910	0	1935
TOTAL SUPPLY	0	2116	0	2210	0	2265
Intra-EC Exports	0	409	0	410	0	410
Other Exports	0	48	0	50	0	50
TOTAL Exports	0	457	0	460	0	460
Domestic Consumption	0	1659	0	1750	0	1805
Other Use/Loss	0	0	0	0	0	0
TOTAL Utilization	0	1659	0	1750	0	1805
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	0	2116	0	2210	0	2265

PSD Table						
Country	France					
Commodity	Groundfish, Fillets				(MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2001		01/2002
Beginning Stocks	2000	2000	1000	1000	900	1000
Total Production	32000	32000	33000	33000	0	33000
Intra-EC Imports	15000	84605	15000	85500	0	85500
Other Imports	60000	71379	60000	72500	0	72500
TOTAL Imports	75000	155984	75000	158000	0	158000
TOTAL SUPPLY	109000	189984	109000	192000	900	192000
Intra-EC Exports	4000	13803	3000	14500	0	14500
Other Exports	100	816	100	900	0	900
TOTAL Exports	4100	14619	3100	15400	0	15400
Domestic Consumption	102900	173365	104000	174600	0	174600
Other Use/Loss	1000	1000	1000	1000	0	1000
TOTAL Utilization	103900	174365	105000	175600	0	175600
Ending Stocks	1000	1000	900	1000	0	1000
TOTAL DISTRIBUTION	109000	189984	109000	192000	0	192000

PSD Table						
Country	France					
Commodity	Lobster				(MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2001		01/2002
Beginning Stocks	102	102	101	100	100	100
Total Production	400	400	400	400	0	400
Intra-EC Imports	2600	2948	2600	2900	0	2900
Other Imports	7500	6082	7500	6200	0	6200
TOTAL Imports	10100	9030	10100	9100	0	9100
TOTAL SUPPLY	10602	9532	10601	9600	100	9600
Intra-EC Exports	500	562	500	500	0	500
Other Exports	300	335	300	300	0	300
TOTAL Exports	800	897	800	800	0	800
Domestic Consumption	9700	8534	9700	8699	0	8700
Other Use/Loss	1	1	1	1	0	0
TOTAL Utilization	9701	8535	9701	8700	0	8700
Ending Stocks	101	100	100	100	0	100
TOTAL DISTRIBUTION	10602	9532	10601	9600	0	9600

PSD Table						
Country	France					
Commodity	Scallops				(MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2001		01/2002
Beginning Stocks	2825	2825	1765	1600	705	1500
Total Production	12500	12500	12500	13000	0	13000
Intra-EC Imports	5000	7883	5000	8000	0	8000
Other Imports	9500	7458	9500	7500	0	7500
TOTAL Imports	14500	15341	14500	15500	0	15500
TOTAL SUPPLY	29825	30666	28765	30100	705	30000
Intra-EC Exports	3000	3007	3000	3100	0	3100
Other Exports	50	99	50	100	0	100
TOTAL Exports	3050	3106	3050	3200	0	3200
Domestic Consumption	25000	25950	25000	25390	0	25290
Other Use/Loss	10	10	10	10	0	10
TOTAL Utilization	25010	25960	25010	25400	0	25300
Ending Stocks	1765	1600	705	1500	0	1500
TOTAL DISTRIBUTION	29825	30666	28765	30100	0	30000

PSD Table						
Country	France					
Commodity	Surimi				(MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2001		01/2002
Beginning Stocks	0	0	0	0	0	0
Total Production	0	24800	0	25000	0	25200
Intra-EC Imports	0	801	0	800	0	850
Other Imports	0	13661	0	14000	0	14100
TOTAL Imports	0	14462	0	14800	0	14950
TOTAL SUPPLY	0	39262	0	39800	0	40150
Intra-EC Exports	0	2248	0	2260	0	2300
Other Exports	0	503	0	500	0	510
TOTAL Exports	0	2751	0	2760	0	2810
Domestic Consumption	0	28800	0	29100	0	29400
Other Use/Loss	0	7711	0	7940	0	7940
TOTAL Utilization	0	36511	0	37040	0	37340
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	0	39262	0	39800	0	40150

Trade Matrices

Salmon, whole/eviscerated, fresh/frozen

Import Trade Matrix			
Country	France		
Commodity	Salmon, Whole/Eviscerated		
Time period	Jan-Dec	Units:	MT
Imports for:	1999		2000
U.S.	7255	U.S.	6301
Others		Others	
Norway	38864	Norway	34033
UK	26963	UK	19894
Germany	14993	Germany	12676
Sweden	8730	Sweden	8732
Ireland	6398	Ireland	5217
Spain	2104	Spain	1695
Belgium	677	Belgium	1223
Total for Others	98729		83470
Others not Listed	1699		1861
Grand Total	107683		91632

Export Trade Matrix			
Country	France		
Commodity	Salmon, Whole/Eviscerated		
Time period	Jan-Dec	Units:	MT
Exports for:	1999		2000
U.S.		U.S.	
Others		Others	
Belgium	1160	Belgium	881
Italy	537	Italy	344
Spain	451	Spain	329
UK	270	Luxemburg	251
Luxemburg	242	Germany	221
Germany	216	Denmark	213
Total for Others	2876		2239
Others not Listed	568		668
Grand Total	3444		2907

Trade matrices for salmon, whole/eviscerated, fresh/frozen, for the January-May time period:

Imports	Jan-May 2000	Jan-May 2001
U.S.	1,818	2,403
Others:		
Norway	13,291	9,918
UK	7,434	9,001
Germany	3,949	4,311
Sweden	2,895	3,798
Ireland	1,672	3,667
Total of Others	29,241	30,695
Others not Listed	1,761	2,068
Grand Total	32,820	35,166

Exports	Jan-May 2000	Jan-May 2001
U.S.		
Others:		
Germany	87	605
Belgium	416	322
Italy	123	224
Spain	115	149
Netherlands	52	143
Luxemburg	91	139
Total of Others	884	1,582
Others not Listed	323	298
Grand Total	1,207	1,880

Canned Salmon

Import Trade Matrix			
Country	France		
Commodity	Salmon, Canned		
Time period	Jan-Dec	Units:	MT
Imports for:	1999		2000
U.S.	804	U.S.	382
Others		Others	
Thailand	248	Denmark	324
Canada	228	Thailand	307
Norway	192	Norway	237
Denmark	188	Netherlands	168
Russia	132	Canada	134
		UK	114
Total for Others	988		1284
Others not Listed	303		220
Grand Total	2095		1886

Export Trade Matrix			
Country	France		
Commodity	Salmon, Canned		
Time period	Jan-Dec	Units:	MT
Exports for:	1999		2000
U.S.	0	U.S.	20
Others		Others	
Belgium	112	Belgium	150
Germany	92	Germany	86
Spain	55	Spain	66
Total for Others	259		302
Others not Listed	85		135
Grand Total	344		457

Trade matrices for salmon, canned, for the January-May time period:

Imports	Jan-May 2000	Jan-May 2001
U.S.	115	126
Others		
Thailand	184	207
Norway	108	102
Denmark	141	94
Germany	2	72
Canada	134	0
Total of Others	569	475
Others not Listed	131	224
Grand Total	815	825

Exports	Jan-May 2000	Jan-May 2001
U.S.	0	6
Others:		
Belgium	93	90
Germany	34	30
UK	6	27
Italy	27	24
Spain	24	21
Total of Others	184	192
Others not Listed	23	18
Grand Total	207	216

Groundfish Fillets

Import Trade Matrix			
Country	France		
Commodity	Groundfish, Fillets		
Time period	Jan-Dec	Units:	MT
Imports for:	1999		2000
U.S.	3842	U.S.	3061
Others		Others	
Germany	22314	Germany	22684
Denmark	21962	China	19454
China	17117	Netherlands	16574
UK	13889	Denmark	16535
Netherlands	12583	UK	12479
Argentina	7517	Russia	9081
New Zealand	7492	Belgium	6921
Iceland	6518	Iceland	5834
Belgium	6410	Chile	5527
Norway	5157	Spain	5437
Total for Others	120959		120526
Others not Listed	32738		32397
Grand Total	157539		155984

Export Trade Matrix			
Country	France		
Commodity	Groundfish, Fillets		
Time period	Jan-Dec	Units:	MT
Exports for:	1999		2000
U.S.		U.S.	
Others		Others	
Belgium	2941	Belgium	2952
Germany	2177	Germany	2846
Italy	1670	Italy	2200
Netherlands	1385	Spain	1817
UK	1151	Netherlands	1532
Spain	1044	UK	969
Total for Others	10368		12316
Others not Listed	2401		2303
Grand Total	12769		14619

January-May trade matrices for groundfish fillets:

Imports	Jan-May 2000	Jan-May 2001
U.S.	1,152	1,817
Others		
Germany	9,147	11,019
China	8,334	9,790
Denmark	6,628	8,829
Netherlands	6,462	7,985
Russia	3,338	5,013
UK	5,408	4,672
Belgium	2,686	3,526
Chile	1,927	3,366
New Zealand	2,169	2,909
Spain	2,497	2,899
Total of Others	48,596	60,008
Others not Listed	16,644	13,504
Grand Total	66,392	75,329

Exports	Jan-May 2000	Jan-May 2001
U.S.	0	24
Others:		
Germany	994	1794
Belgium	1189	1550
Italy	800	1518
Spain	877	769
UK	479	635
Luxemburg	199	354
Netherlands	611	353
Total of Others	5,149	6,973
Others not Listed	790	914
Grand Total	5,939	7,911

Lobster

Import Trade Matrix			
Country	France		
Commodity	Lobster		
Time period	Jan-Dec	Units:	MT
Imports for:	1999		2000
U.S.	2366	U.S.	2527
Others		Others	
Canada	2341	Canada	1765
Spain	1508	Spain	1124
UK	943	UK	809
Bahamas	725	Bahamas	791
Total for Others	5517		4489
Others not Listed	2549		2014
Grand Total	10432		9030

Export Trade Matrix			
Country	France		
Commodity	Lobster		
Time period	Jan-Dec	Units:	MT
Exports for:	1999		2000
U.S.		U.S.	
Others		Others	
Japan	218	Japan	296
Germany	126	Spain	131
Spain	117	Germany	121
Italy	108	Italy	118
Total for Others	569		666
Others not Listed	252		231
Grand Total	821		897

Lobster trade matrices for the Jan-May time period:

Imports	Jan-May 2000	Jan-May 2001
U.S.	573	560
Others		
Canada	115	244
Spain	323	203
Ireland	51	125
UK	217	115
Belgium	131	44
Total of Others	837	731
Others not Listed	416	316
Grand Total	1,826	1,607

Exports	Jan-May 2000	Jan-May 2001
U.S.		
Others:		
Japan	294	270
Spain	35	55
Germany	38	37
Italy	46	30
Total of Others	413	392
Others not Listed	92	83
Grand Total	515	475

Scallops

Import Trade Matrix			
Country	France		
Commodity	Scallops		
Time period	Jan-Dec	Units:	MT
Imports for:	1999		2000
U.S.	656	U.S.	789
Others		Others	
UK	3572	UK	3484
Denmark	3514	Denmark	2665
Peru	2206	Chile	1800
Chile	2004	Peru	1549
Argentina	1166	Argentina	1164
Belgium	647	Canada	743
Netherlands	629	Netherlands	683
Iceland	616	Ireland	659
Ireland	535	Iceland	511
Canada	509		
Total for Others	15398		13258
Others not Listed	1020		1294
Grand Total	17074		15341

Export Trade Matrix			
Country	France		
Commodity	Scallops		
Time period	Jan-Dec	Units:	MT
Exports for:	1999		2000
U.S.		U.S.	
Others		Others	
Spain	1376	Spain	1265
Italy	499	Italy	805
Belgium	463	Belgium	460
UK	213	UK	175
Germany	148	Germany	156
Total for Others	2699		2861
Others not Listed	429		245
Grand Total	3128		3106

Scallop trade matrices for the January-May time period

Imports	Jan-May 2000	Jan-May 2001
U.S.	120	603
Others		
UK	1,264	2,072
Denmark	1,346	1,550
Chile	563	762
Argentina	462	757
Peru	667	525
Netherlands	232	513
Total of Others	4,534	6,179
Others not Listed	1,377	968
Grand Total	6,031	7,750

Exports	Jan-May 2000	Jan-May 2001
U.S.		
Others:		
Spain	343	542
Italy	437	391
Belgium	186	207
Total of Others	966	1,140
Others not Listed	217	317
Grand Total	1,183	1,457

Surimi

Import Trade Matrix			
Country	France		
Commodity	Surimi		
Time period	Jan-Dec	Units:	MT
Imports for:	1999		2000
U.S.	8553	U.S.	6734
Others		Others	
Thailand	1933	China	2203
South Korea	1923	Thailand	1266
China	913	South Korea	1243
Chile	878	Belgium	592
Argentina	625	Chile	550
Peru	508	Argentina	475
Canada	428	Peru	372
Russia	377	India	341
Netherlands	229	Russia	200
India	166	Canada	186
Total for Others	7980		7428
Others not Listed	353		300
Grand Total	16886		14462

Export Trade Matrix			
Country	France		
Commodity	Surimi		
Time period	Jan-Dec	Units:	MT
Exports for:	1999		2000
U.S.		U.S.	
Others		Others	
Spain	722	Spain	1865
UK	127	Lithuania	221
Italy	48	Russia	159
Belgium	40	UK	115
Germany	32	Italy	101
Total for Others	969		2461
Others not Listed	172		290
Grand Total	1141		2751

Surimi trade matrix for the January-May period of time:

Imports	Jan-May 2000	Jan-May 2001
U.S.	2,684	3,215
Others		
Thailand	396	649
South Korea	363	545
Chile	176	428
Belgium	131	423
China	833	351
Argentina	0	200
India	141	125
Total of Others	2,040	2,721
Others not Listed	386	172
Grand Total	5,110	6,108

Exports	Jan-May 2000	Jan-May 2001
U.S.		
Others:		
Spain	364	638
UK	29	51
Belgium	26	36
Italy	39	25
Egypt	13	21
Russia	37	13
Total of Others	469	759
Others not Listed	298	84
Grand Total	767	843

Monkfish

Import Trade Matrix			
Country	France		
Commodity	Monkfish		
Time period	Jan-Dec	Units:	MT
Imports for:	1999		2000
U.S.	1,504	U.S.	745
Others		Others	
UK	3,738	UK	2,667
Ireland	899	Ireland	1,046
Spain	495	Spain	634
Netherlands	469	Netherlands	630
Belgium	424	Denmark	372
Namibia	302	Belgium	366
Denmark	225	Namibia	296
South Africa	206	South Africa	270
Total for Others	6,758		6,281
Others not Listed	390		405
Grand Total	8,652		7,431

Export Trade Matrix			
Country	France		
Commodity	Monkfish		
Time period	Jan-Dec	Units:	MT
Exports for:	1999		2000
U.S.		U.S.	
Others		Others	
Spain	263	Spain	224
Italy	96	Italy	141
Germany	60	Germany	43
Luxemburg	36	Luxemburg	32
Total for Others	455		440
Others not Listed	48		58
Grand Total	503		498

Monkfish trade matrices fro the January-May period of time:

Imports	Jan-May 2000	Jan-May 2001
U.S.	271	339
Others		
UK	1,134	1,489
China	23	492
Ireland	455	413
Netherlands	116	147
Belgium	78	141
Total of Others	1,806	2,682
Others not Listed	836	570
Grand Total	2,913	3,591

Exports	Jan-May 2000	Jan-May 2001
U.S.		
Others:		
Spain	263	224
Italy	96	141
Germany	60	43
Luxemburg	36	32
UK	3	28
Total of Others	458	468
Others not Listed	45	30
Grand Total	503	498

Dogfish

Import Trade Matrix			
Country	France		
Commodity	Dogfish		
Time period	Jan-Dec	Units:	MT
Imports for:	1999		2000
U.S.	3,318	U.S.	2,061
Others		Others	
UK	990	UK	711
Canada	363	Canada	693
Belgium	180	Belgium	258
Denmark	180	Spain	209
Spain	163	Ireland	196
Ireland	124	Denmark	166
Total for Others	2,000		2,233
Others not Listed	303		320
Grand Total	5,621		4,614

Export Trade Matrix			
Country	France		
Commodity	Dogfish		
Time period	Jan-Dec	Units:	MT
Exports for:	1999		2000
U.S.		U.S.	
Others		Others	
Italy	842	Italy	800
Spain	55	Spain	169
Belgium	76	Belgium	68
Portugal	31	Portugal	37
Total for Others	1,004		1,074
Others not Listed	47		82
Grand Total	1,051		1,156

Dogfish trade matrices fro the January-May period of time:

Imports	Jan-May 2000	Jan-May 2001
U.S.	1,149	253
Others		
UK	346	654
Canada	125	196
Spain	96	132
Chile	14	99
Ireland	45	80
Belgium	149	74
Total of Others	775	1,235
Others not Listed	211	156
Grand Total	2,135	1,644

Exports	Jan-May 2000	Jan-May 2001
U.S.		
Others:		
Italy	358	375
Spain	41	137
Hong Kong	0	73
Belgium	35	40
Total of Others	434	625
Others not Listed	45	35
Grand Total	479	660

Price Tables

Exchange rates are 1 $ = 6.10 FF in 1999 and 1 $ = 7.13 FF in 2000.

Prices Table			
Country	France		
Commodity	Salmon, Whole/Eviscerated		
Prices in	FF	per uom	Kg
Year	1999	2000	% Change
Jan	25.4	29	14.17%
Feb	25.5	30.6	20.00%
Mar	25.6	31.4	22.66%
Apr	27.1	32.4	19.56%
May	27.8	37.1	33.45%
Jun	27.5	35.6	29.45%
Jul	27	32.9	21.85%
Aug	27	35.3	30.74%
Sep	27	31.3	15.93%
Oct	26.3	27	2.66%
Nov	25.9	27	4.25%
Dec	27.6	27	-2.17%
Exchange Rate		Local currency/US $	

Note: Above data are wholesale prices recorded on the Rungis wholesale market for salmon imported from Norway.

Prices Table			
Country	France		
Commodity	Groundfish, Fillets		
Prices in	FF	per uom	Kg
Year	1999	2000	% Change
Jan	41.5	40.9	-1.45%
Feb	41.6	47.7	14.66%
Mar	41.9	53.1	26.73%
Apr	45.1	54.4	20.62%
May	42.6	47.8	12.21%
Jun	42.1	50.1	19.00%
Jul	39.7	44.2	11.34%
Aug	47.2	52.3	10.81%
Sep	44.7	48.7	8.95%
Oct	45.3	50	10.38%
Nov	47.2	54.3	15.04%
Dec	36	53.2	47.78%
Exchange Rate		Local currency/US $	

Note: Above data are wholesale prices recorded on the Rungis wholesale market for imported cod fillets (from all destinations).

Prices Table			
Country	France		
Commodity	Lobster		
Prices in	FF	per uom	Kg
Year	1999	2000	% Change
Jan	88.3	99.4	12.57%
Feb	98.6	118	19.68%
Mar	111	120	8.11%
Apr	115	125	8.70%
May	90.7	103	13.56%
Jun	105	107	1.90%
Jul	106	110	3.77%
Aug	101	108	6.93%
Sep	97.7	95	-2.76%
Oct	96.3	95	-1.35%
Nov	97.3	98.2	0.92%
Dec	99	114	15.15%
Exchange Rate		Local currency/US $	

Note: Above data are wholesale prices recorded on the Rungis wholesale market for lobster imported from Canada.

Prices Table			
Country	France		
Commodity	Scallops		
Prices in	FF	per uom	Kg
Year	1999	2000	% Change
Jan	158	142	-10.13%
Feb	119	130	9.24%
Mar	106	129	21.70%
Apr	123	126	2.44%
May	121	115	-4.96%
Jun	119	111	-6.72%
Jul	114	105	-7.89%
Aug	116	119	2.59%
Sep	125	132	5.60%
Oct	130	132	1.54%
Nov	133	142	6.77%
Dec	155	169	9.03%
Exchange Rate		Local currency/US $	

Note: Above data are wholesale prices recorded on the Rungis wholesale market for imported unshelled scallops from all destinations.

Strategic Indicator Table

FISHERY PRODUCTS STRATEGIC INDICATOR TABLE					
		Previous	Current	Next	5 Year
		Year	Year	Year	Projections/
U.S. Competitive Position	Measurement *	Situation	Situation	Expectations	Expectations
U.S. Access Relative to Rest of World-Non-Tariff Measures (NTM)	Worse, equal, or better (choose one)	equal	equal	equal	equal
U.S. Access Relative to Rest of World - Tariffs	Higher, equal, or lower (choose one)	equal	equal	equal	equal
Presence of Marketing Programs (domestic and 3rd country) versus U.S. programs	More aggressive, about the same, or less aggressive (select one)	more (domestic, Norway, Scotland, Canada)	more (domestic, Norway, Scotland, Canada)	more (domestic, Norway, Scotland, Canada)	more (domestic, Norway, Scotland, Canada)
U.S. Prices Relative to Domestic and 3rd Country Prices	Higher, equal, or lower (choose one)	equal-lower	equal-lower	equal-lower	equal-lower
U.S. Market Share (3 Year. Average)	Percent	4	4	4	4
		Previous	Current	Next	5 Year
		Year	Year	Year	Projections/
Market Attractiveness	Measurement *	Situation	Situation	Expectations	Expectations
Per Capita Consumption of All Fishery Products	Kg per person	21	22	22	22
Per Capita Consumption of animal proteins (excluding fishery products)	Kg per person	94 meat + 141 dairy	95 meat + 141 dairy	95 meat + 141 dairy	95 meat + 141 dairy
Percent of population with refrigerators	Percent	99.9	99.9	99.9	99.9
Percent of fishery product sales at supermarkets	Percent	67 (fresh), 59 total	67 (fresh), 60 total	68 (fresh), 60 total	69 (fresh), 61 total
Percent of total food sales at supermarkets	Percent	75	76	77	80
Percent of animal protein sales at supermarkets (excluding fishery products)	Percent	77	78	79	82
Percent of fishery sales at HRI establishments	Percent	27	27	27	27
Percent of fishery sales at open markets	Percent	n/a	n/a	n/a	n/a

Tariff Table

Customs Codes Fresh/Frozen Whole Salmon	Tariffs 2001 (Jan 1-June 30)
03 02 12	2
03 02 19	8
03 03 10	2
03 03 22	2
03 03 29	9

Customs Codes Canned Salmon	Tariffs 2001 (Jan 1-June 30)
16 04 11	5.5

Customs Codes Groundfish Fillets	Tariffs 2001 (Jan 1-June 30)
03 04 10 11	12
03 04 10 13	2
03 04 10 19	9
03 04 10 31	18
03 04 10 33	18
03 04 10 35	18
03 04 10 38	18
03 04 10 91	8
03 04 10 97	15
03 04 10 98	15
03 04 20 11	12
03 04 20 13	2
03 04 20 19	9
03 04 20 21 to 03 04 20 43	7.5
03 04 20 45	18
03 04 20 51	15
03 04 20 53	15
03 04 20 55 to 03 04 20 73	7.5
03 04 20 75 to 03 04 20 83	15
03 04 20 91	7.5
03 04 20 95	15

Customs Codes Lobster	Tariffs 2001 (Jan 1-June 30)
03 06 11	12.5
03 06 21	12.5
03 06 12 10	6
03 06 12 90	16
03 06 22 10	8
03 06 22 91	8
03 06 22 99	10

Customs Codes Scallops	Tariffs 2001 (Jan 1-June 30)
03 07 21	8
03 07 29	8

Customs Codes Surimi	Tariffs 2001 (Jan 1-June 30)
03 04 90 05	15
16 04 20 05	20

Customs Codes Monkfish	Tariffs 2001 (Jan 1-June 30)
03 02 69 81	15
03 03 79 81	15
03 04 20 83	15
03 04 90 57	7.5

Customs Codes Dogfish	Tariffs 2001 (Jan 1-June 30)
03 02 65 20	6
03 02 65 50	6
03 02 65 90	8
03 03 75 20	6
03 03 75 50	6
03 03 75 90	8
03 04 20 61	7.5
03 04 20 69	7.5

Section III: Production, Supply and Demand

Production

The most recent complete data available on French seafood and aquaculture production from the French Ministry of Agriculture and Fisheries (MinAg) and the French Seafood board (OFIMER) is for 1998. It includes the following:

1998	Quantity (MT)	Value (million $)
Fresh Wild Catch Sold at Auction Markets	303,826	735
Fresh Wild Catch not Sold at Auction Markets	74,481	123
Aquaculture	265,566	569
Frozen Wild Catch	171,891	185
TOTAL	815,764	1,612

To date, the only data available for 1999 are for fresh wild catch sold at auction markets, which was 282,444 MT, valued at $ 696 million.

In 2000, there were 285,512 MT of seafood sold at auction markets (1 percent increase) with a value of USD 621 million. In volume, the leading species sold at auction markets in 2000 were sardines (23,694 MT), andchovies (21,418 MT), whiting (17,320 MT), coalfish (16,403 MT), cuttlefish (16,112 MT), mackerel (11,054 MT), and scallops (10,057 MT). In value, the main species sold at auction markets were sole (USD 65.6 million), monkfish (USD 42 million), Norway lobster (USD 40.3 million), anchovies (USD 30.8 million), bass (USD 30.5 million), hake (USD 27.9 million) and scallops (USD 27.5 million).

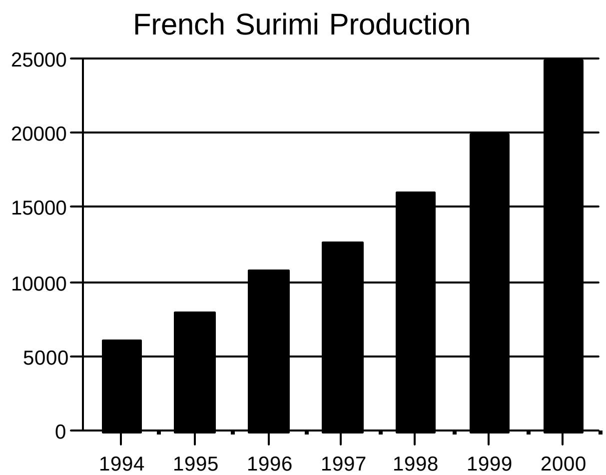
The leading auctionmarket in 2000 remained that of Boulogne-sur-Mer (Northern France, located on the Channel), with 52,179 MT of seafood sold (18 percent of the totalquantity of seafood sold at auction markets) with a value of USD 80 million (13 percent of the value of seafood sold at auction markets).

During the first half of 2001, 144,105 MT of fresh wild catch were sold at auction markets, up one percent from 143,521 MT during the same period in 2000. The value of the fresh wild catch sold at auction markets increased from USD 306 million in January-June 2000 to USD 313 million in January-June 2001.

Canned salmon production is published by the French Federation of Canned Food Industries (FIAC). It has been increasing in the past few years as a result of the growing demand from French consumers.

	1998	1999	2000
MT of Salmon Processed	265	331	428
MT Canned Salmon Produced	97	149	230

According to the Association for the Development of the Surimi Industry (ADISUR), surimi production has sharply increased since 1994, responding to the growing consumer demand for this product. It totaled 24,800 MT in 2000, a 25 percent increase from 1999. French surimi processing companies are Comaboko, Cuisimer, Fleury Michon, Narvik and Protimer.



Consumption

All Fishery Products

Fishery products consumption includes household consumption and hotels, restaurants and institutions (HRI) consumption. There were 206,000 MT consumed in HRI in 2000, including 109,000 MT of fresh seafood, 5,300 MT of catered seafood, 83,500 MT of frozen seafood, and 8,800 MT of canned seafood.

French household consumption in 2000 increased by 1 percent in volume but decreased by 9 percent in value, mainly due to the stronger dollar exchange rate vis-a-vis the French Franc and the Euro. Accoding to SECODIP, French household consumption can be broken down as follows in 1999 and 2000:

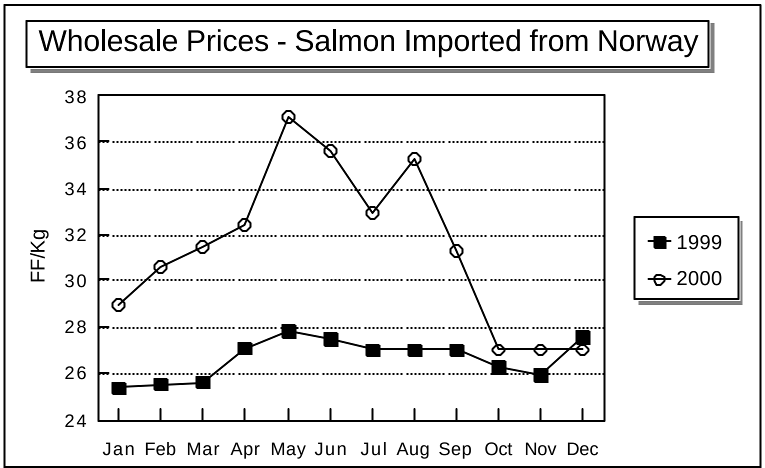
	1999		2000	
	Quantity (MT)	Value (Million USD)	Quantity (MT)	Value (Million USD)
Fresh Finfish	136,690	1,285	134,494	1,160
Fresh Crustaceans	30,969	368	28,510	318
Fresh Shellfish & Cephalopods	95,866	379	96,240	354
Catered Seafood	35,256	337	39,990	332
Smoked, Salted and Dried Seafood	25,980	425	25,415	379
Frozen Seafood	119,951	929	121,792	844
Canned Seafood	103,704	725	107,839	646
TOTAL	548,416	4,448	554,280	4,033

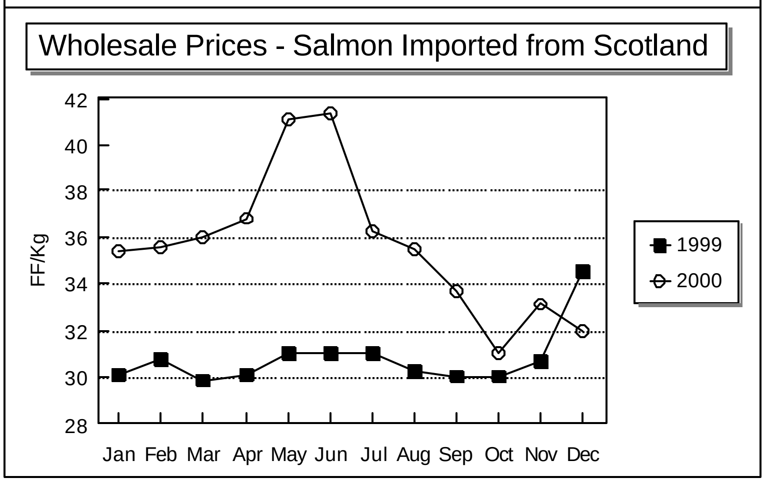
According to OFIMER and SECODIP, French household consumption of fishery products increased by 4 percent in volume and 8 percent in value from the first half of 2000 to the first half of 2001. The largest increase is for catered products, mainly due to increased sales of surimi. Supermarket share remained stable at 67 percent.

Household Consumption Jan-June 2001	Quantity (MT)	Value ($ million)
Fresh Finfish	64,843	570
Fresh Crustaceans	12,655	142
Fresh Shellfish & Cephalopods	38,171	159
Catered Seafood	19,054	154
Smoked, Salted and Dried Seafood	11,918	172
Frozen Seafood	60,350	409
Canned Seafood	48,310	291
TOTAL	255,301	1,897

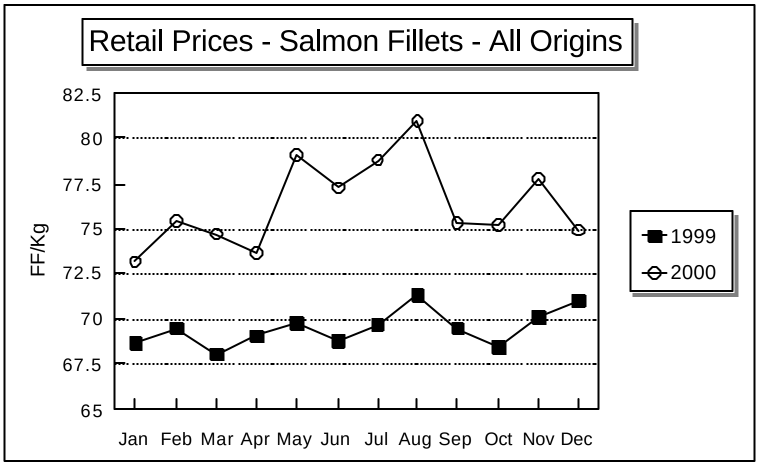
Salmon

The following graphs indicate wholesale prices for salmon imported from Scotland and Norway at the major French wholesale market located close to Paris in Rungis.





The following graph illustrates retail prices for salmon fillets from all origins.

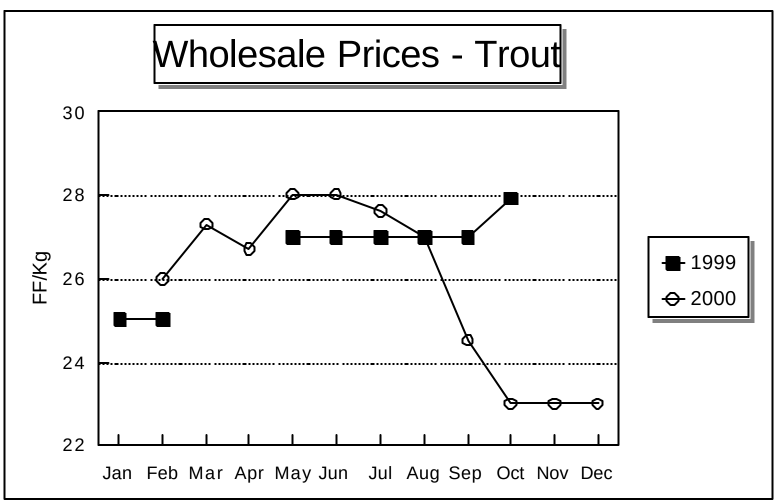


Wholesale and retail prices for salmon increased significantly in 2000 from 1999, mainly due to reduced imports from France's leading suppliers, i.e., Norway and Scotland. As a result, French salmon consumption declined significantly. During the three first quarters of 2000, supermarket sales of fresh salmon decreased by 16 percent, from the same period of 1999. However, fresh salmon sales partially recovered in December 2000, when the price differential with 1999 was lower than during the rest of the year. In addition, French consumers sharply reduced their purchases of beef in December 2000 as a result of the "mad cow" crisis, and partially replaced beef with salmon.

Overall, salmon remained the leading fish species sold in supermarkets in France in 2000. French household consumption can be broken down as follows:

	Quantity (MT)	Value (USD million)
Fresh	19,283	175
Smoked	12,527	253
Marinated	80	2
Canned	1,039	9
Frozen Raw	5,064	41
Frozen Smoked	92	3
TOTAL	38,085	483

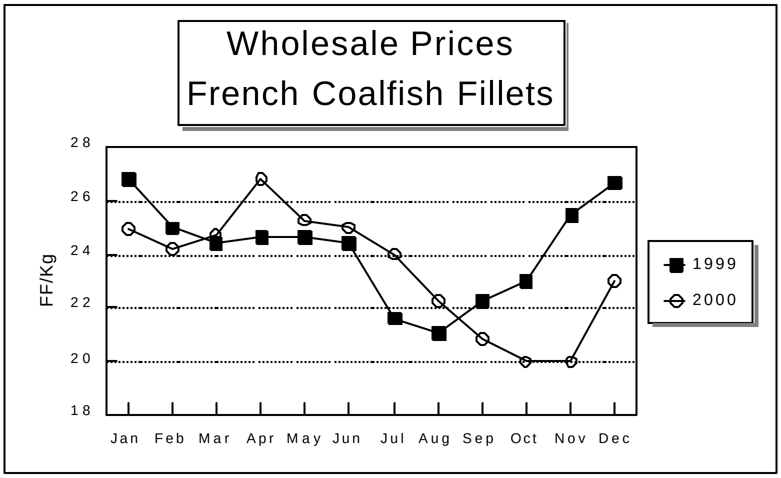
French consumers are increasingly sentitive to quality certifications and labels, and the "mad cow" crisis of late 2000 reinforced this trend. As a result, sales of Label Rouge (high quality) Scottish salmon in France increased by 33 percent in 2000. Irish organic salmon production is expected to start in 2001 with 600 MT and plans to expand quickly (Irish seafood producers say 25 percent per year) through 2005. This product is expected to find a niche market in France.

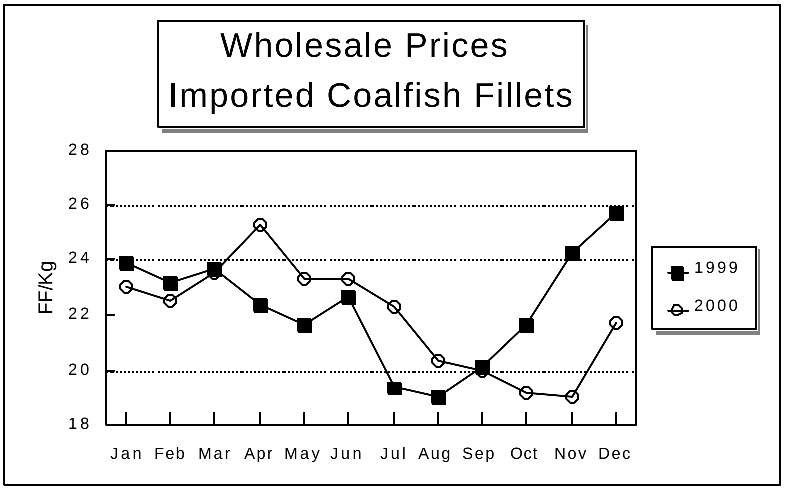


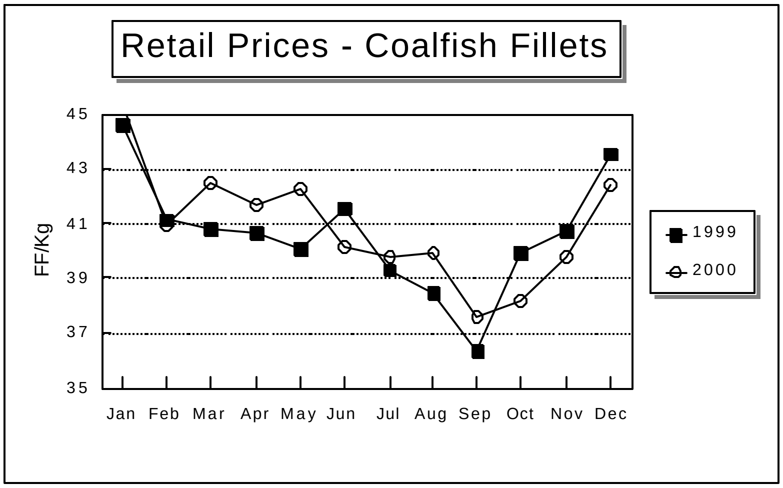
Imported salmon is in direct competition with domestically-grown trout on the French market. Trout benefits from lower prices than salmon (as indicated in graph below) but doesn't have the festive image of salmon in French consumers minds.

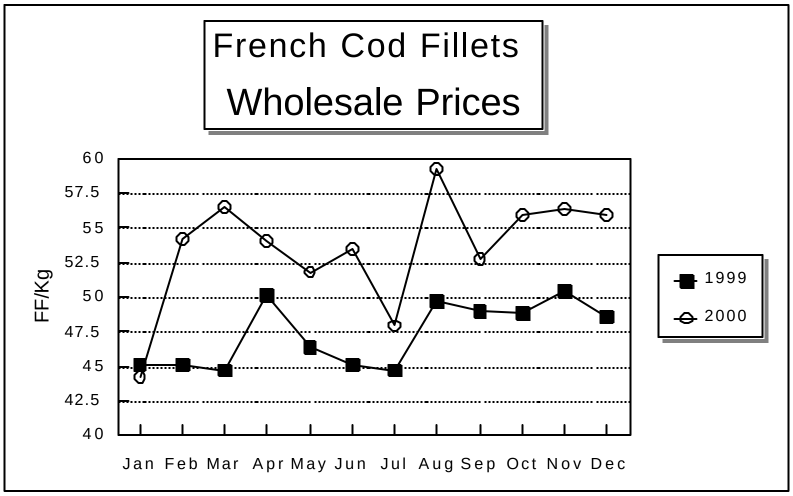
Groundfish Fillets

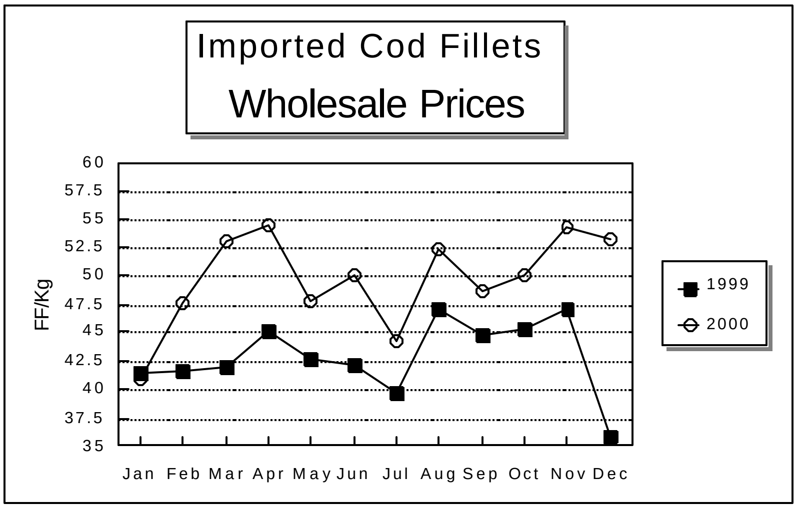
Coalfish and cod are the leading categories of fillets sold on the French market. Wholesale and retail prices for these products were the following in 1999 and 2000:

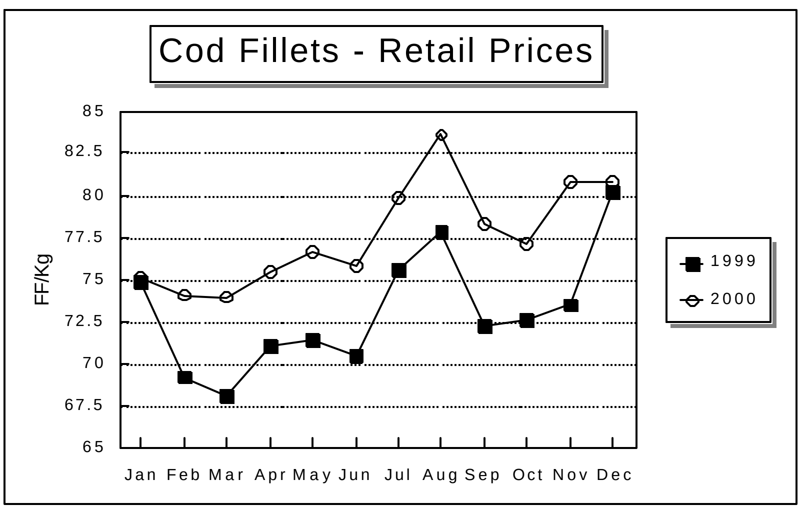







French Cod Fillets
Wholesale Prices
FF/Kg
60
57.5
55
52.5
50
47.5
45
42.5
40
Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec
1999
2000


Imported Cod Fillets
Wholesale Prices
FF/Kg
60
57.5
55
52.5
50
47.5
45
42.5
40
37.5
35
Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec
1999
2000


Cod Fillets - Retail Prices
FF/Kg
85
82.5
80
77.5
75
72.5
70
67.5
65
Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec
1999
2000

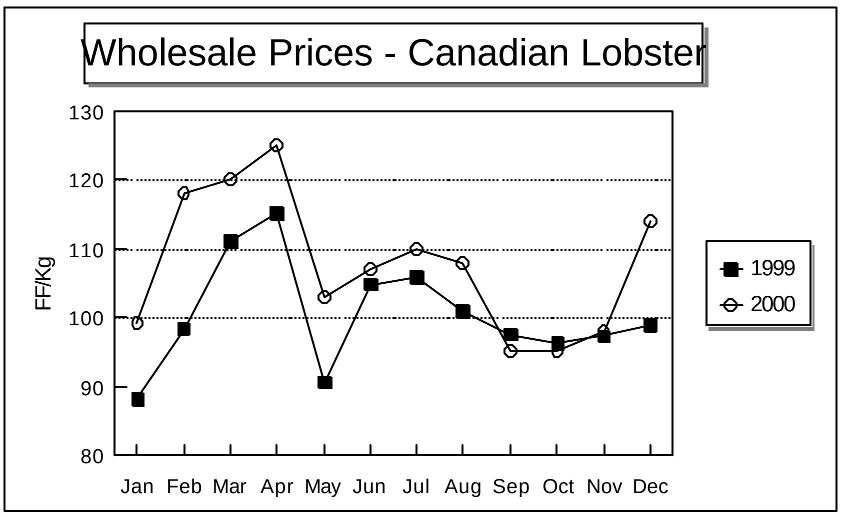
The above graphs indicate that prices for domestically-produced coalfish fillets and imported coalfish fillets are close. Despite some fluctuations, average annual wholesale and retail prices for coalfish fillets remained relatively stable from 1999 to 2000.

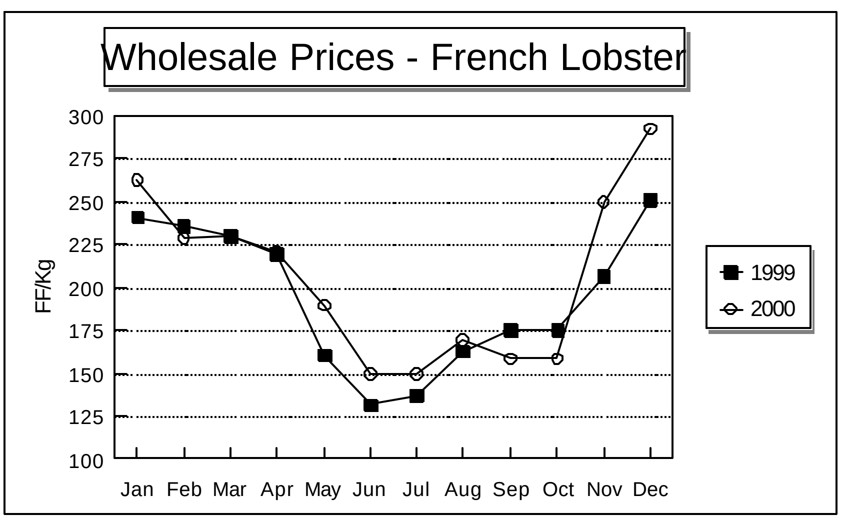
In contrast, wholesale and retail prices for cod fillets increased by approximately 10 percent from 1999 to 2000. Imported cod fillets are significantly lower than domestically-produced cod fillets.

Overall, groundfish fillet prices peak in spring time when filleting plants' activity is limited by reduced raw material supply, and in November and December when wild catch is reduced.

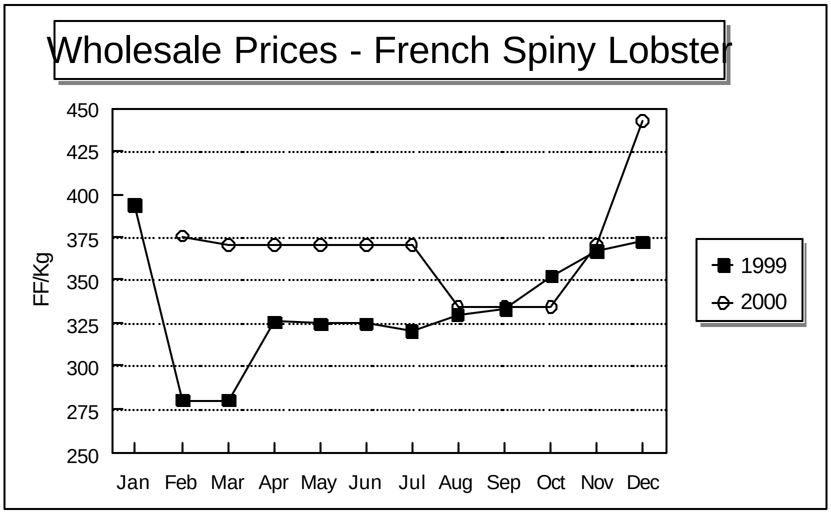
Lobster

Wholesale prices for lobster on the Rungis wholesale market were as follows in 1999 and 2000:





As indicated in the above graphs, prices for domestically-caught lobster are roughly twice prices for lobster imported from Canada. This is due to the limited domestic production of approximately 400 MT per year, which is marginal



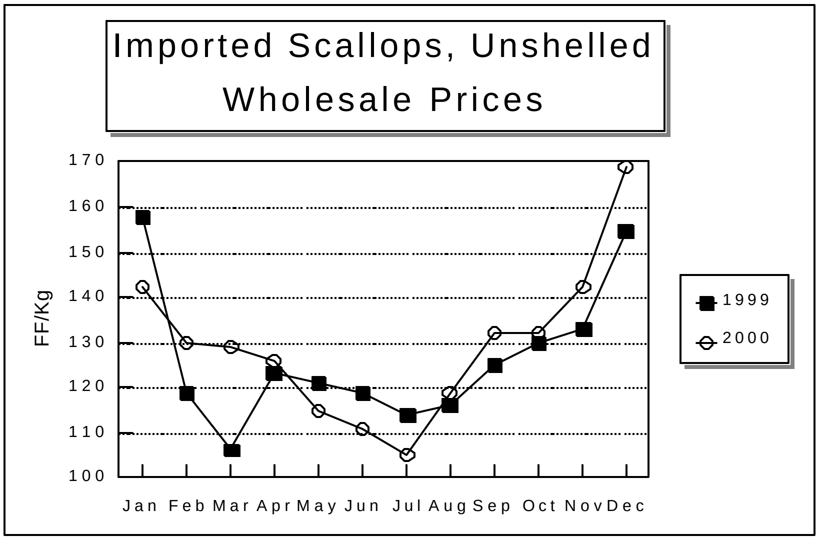
compared to consumer demand. While there are no prices available for U.S.-produced lobster, they are likely to be close to Canadian lobster prices. Prices are the highest in festive periods of time, i.e., in the Easter and Christmas seasons.

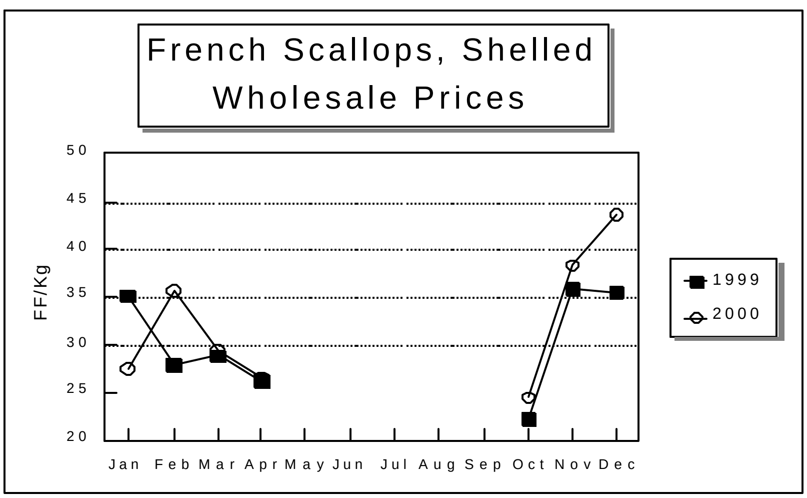
The above graph describes wholesale prices for domestically-caught spiny lobster, live. Quantities of live spiny lobster imported (mainly form Australia and South Africa) are too low to draw a statistical graph. Wholesale prices for imported spiny lobster, live, were around 240 FF/Kg in 2000, in direct competition with French live homarus.

For all categories of lobster (homarus and spiny lobster, live and frozen, whole and tail), prices increased from 1999 to 2000. This was mainly due to the stronger U.S. dollar relative to the Euro and the lower lobster production in the world. As a result, French imports and consumption declined.

Scallops

Wholesale prices for scallops were as follows on the Rungis wholesale market in 1999 and 2000:





The above graphs indicate that unshelled scallops are approximately four times more expensive than shelled scallops. Scallop prices usually increase sharply in the Christmas period, as it is a traditional product which is principally consumed during that period of time. In fact, frozen scallops are purchased throughout the year, while fresh shelled scallops are purchased in the Christmas and New Year period.

French household consumption of frozen scallops was 4,807 MT in 2000, one percent lower than in 1999. France is one of the leading consumers of frozen scallops in the world. The French market for raw frozen scallops is 2,377 MT, sold at the average retail price of 108 FF/Kg, and the market for prepared frozen scallops is 2,430 MT, sold at 101 FF/Kg on average. Tipiak and Celtigel are the two leading scallop processors in France. Celtigel processes a larger amount of domestically-produced scallops than Tipiak, which is more oriented toward imported products.

French household consumption of fresh scallops was 6,111 MT in 2000, including 4,972 MT shelled and 1,141 MT unshelled scallops. Sales of fresh scallops increased by 16 percent in volume and 18 percent in value in 2000 from 1999. This resulted from the increase in domestic production: scallops sold at auction markets increased by 20 percent in value to 200 million FF and by 18 percnet in volume to 11,100 MT in 2000.

Although a large percentage of scallops is still sold at specialized fish shops (25 percent) and street markets (20 percent), supermarket share increased by 3 percent to 47 percent in 2000.

Surimi

According to the Association for the Development of the Industry of Surimi (ADISUR), total French surimi consumption (including household and HRI consumption) increased by 20 percent from 1999 to 2000, to 28,794 MT, i.e., 38 percent of Western European consumption, estimated at 75,000 MT. The increase in value from 1999 to 2000 was slightly lower (18 percent) to FF 1.16 billion (USD 163 million), due to the large market share of surimi sold as low-priced supermarket branded products.

For household consumption only, SECODIP estimates that 18,088 MT of fresh surimi were consumed in 2000 (a 23 percent increase from 1999), accounting for 45 percent of catered seafood consumption and amounting to USD 142 million. In addition, 1,642 MT of frozen surimi were consumed in 2000 by French households, at the value of USD 8.8 million.

Trade

Salmon

French imports of fresh and frozen whole salmon decreased by 15 percent from 1999 to 2000, due to reduced shipments from all suppliers. Norway remained France's leading supplier with 37 percent market share, followed by the United Kingdom (Scotland), 22 percent market share. U.S. salmon represented 7 percent of French imports in 2000, stable from 1999. This decline in imports resulted from reduced salmon supply in producing countries.

Groundfish Fillets

French imports of groundfish fillets remained stable in 2000 relative to 1999. France's leading suppliers of groundfish fillets are Germany (15 percent), China (12 percent), the Netherlands (11 percent), and Denmark (11 percent). The United States' market share is limited to 2 percent.

Lobster

The lobster trade matrix includes homarus and spiny lobster. French imports declined by 13 percent from 1999 to 2000, mainly to due the strong dollar relative to the Euro and lower lobster production in supplying countries. France principally imports live homarus and spiny lobster tails from the United States (28 percent), frozen homarus from Canada (20 percent), and spiny lobster (frozen whole and tails) from Cuba through Spain (12 percent) and the Bahamas (9 percent). France is the EU's leading importer of spiny lobster.

Scallops

French imports of scallops decreased by 10 percent from 1999 to 2000, due to increased domestic supply. France's leading suppliers of scallops were the United Kingdom (23 percent), and Denmark (17 percent). French imports from the United States accounted for 5 percent of the French market.

Surimi

French imports of surimi decreased by 14 percent from 1999 to 2000, as domestic production increased significantly. The United States is France's leading supplier of surimi (mainly surimi base) with 46 percent market share, followed by China (mainly processed surimi - 15 percent), Thailand (processed surimi, 9 percent), and South Korea (processed products, 8.5 percent).

Monkfish and Dogfish

France is a major importer of monkfish and dogfish from the United States. The United States remained France's leading supplier of dogfish in 2000, with 45 percent of the market. French imports of monkfish from the United States in 2000 sharply declined, partially replaced by rising imports from Ireland. Overall, total French imports declined by 14 percent. Imports for the five first months of 2001 indicate that total French imports and imports from the United States are recovering from their abnormally low levels in 2000.

Marketing

European Seafood Exposition (ESE) is the leading seafood show in Europe. It takes place annually in Brussels, Belgium. The last ESE was held on April 24-26, 2001. There were 1,106 companies including processors, retailers, traders, distributers, wholesalers and food service companies from 100 countries. There were 29 national and regional pavilions including a large U.S. pavilion with 50 exhibitors. The next ESE show will take place on April 23-25, 2002. All information to participate is located at:
Http://www.euroseafood.com

The International Food Show (SIAL) takes place every other year in Paris, France. It is the EU's leading food show along with Germany's ANUGA. In 2000, there were 69 exhibitors involved in fresh seafood, 101 exhibitors in canned seafood, and 19 exhibitors in various other seafood categories. Next SIAL will take place in 2002 on October 20-24. Information to partcipate is located at:
Http://www.sial.fr
Sial@sial.fr
Tel: (33-1) 49 68 54 99
Fax: (33-1) 47 31 37 82

Alaska Seafood Marketing Institute (ASMI) is the U.S. organization working on increasing U.S. wild salmon exports to France. ASMI's web site is : http://www.alaskaseafood.org

ASMI is represented in France by:
MARKONSULT
58, rue Pottier
78150 Le Chesnay
Tel: (33-1) 39 23 20 07
Fax: (33-1) 39 23 20 17

American Seafood Institute (ASI) is the U.S. organization promoting exports of U.S. seafood from the East coast, and mainly lobster, monkfish and dogfish.
ASI/Rhode Island Seafood Council
212, Main Street, Suite 3
Wakefield
RI 02879
Tel: (401) 364 6185
Fax: (401) 789 9727