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France

Seafood

Preliminary Data on 1999 French Seafood Market 2000

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Report Highlights:

The United States is one of the top ten leading suppliers of total seafood products to France, a net importer and growing market for seafood. U.S. seafood shipped to France consists mainly of dogfish, monkfish, lobster, salmon, and fish roe. Preliminary data from the French seafood board OFIMER indicate that during the first half of 1999, French households' purchases of seafood products increased 2 percent from the same period of 1998. During the first nine months of 1999, both the wild catch sold at auction in French ports and France's net seafood imports decreased by 8 percent relative to the same 1998 period.

Includes PSD changes: No

Includes Trade Matrix: No

Unscheduled Report

Paris [FR1], FR

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Executive Summary

All data in this report are from the recently-opened web site of the French Seafood Board (OFIMER). French households increased their seafood purchases by 2 percent in value from the first half of 1998 to the first half of 1999. During the first 9 months of 1999, the wild catch sold at auction in France decreased by 8 percent in value compared to the same period of 1998, while France's net imports declined by 8 percent, in value.

It is difficult to match these results with each other because they are incomplete: total French consumption not only includes household consumption, but also hotel, restaurant and institution (HRI) consumption, and auction sales are only a part of total French seafood production. However, these partial production, consumption, and trade data are good economic indicators of the French seafood market, prior to obtaining full year and complete data.

The following exchange rates were used in the report:

1998: 1 USD = 5.90 FF

1999: 1 USD = 6.15 FF

Production

In 1998, total seafood caught by French boats amounted to 604,869 MT 1998, including 80 percent fresh catch and 20 percent frozen catch. Most of fresh catch is sold in auction markets called "La Crie" and the most up-to-date data are for these auction sales. Auction sales were the following during the three first quarters of 1998 and 1999:

	Quantity (MT)	Value (million USD)
1998 (9 months)	225,638	560.6
1999 (9 months)	213,820	515.8
Chg (%)	-5	-8

The severity of the decline in value was increased by a stronger dollar in 1999. In FF, the value of auction sales declined by 4 percent from the three first quarters of 1998 to the same period of 1999.

The main species sold on auction markets were the following during the first nine months of 1998 and 1999:

Species	Market Share (in % of value)
Sole	11
Norway lobster	8
Monkfish	7
Cod	5
Hake	4
Bass	4
Anchovies	4
Whiting	4

Consumption

According to the French consumer survey agency SECODIP, French households increased their seafood purchases by 2 percent from the first half of 1998 to the first half of 1999. This increase in total spending resulted from higher retail prices, as shown in the table below.

	Volume purchased Jan-June 1999 (in MT)	Value of purchases Jan-June 1999 (million USD)	Change in volume Ja-Ju 99/Ja-Ju 98 (in %)	Change in value Ja-Ju 99/Ja-Ju 98 (in %)
Fresh Finfish	66,166	629.1	-2	1
Fresh Crustaceans	13,220	155.0	+2	0
Fresh Shellfish	41,315	176.9	-4	-3
TOTAL FRESH	120,944	961.8	-2	0
CURED (smoked, salted and Dried)	12,084	189.6	-2	+3
FROZEN	57,472	433.7	-3	+6
CANNED	44,884	308.3	+6	+6
CUSTOMER- READY	9,081	95.3	+5	+1
GRAND TOTAL	244,465	1,988.6	-1	+2

Trade

According to French Customs, French net imports of seafood rose in volume but declined in value from the first nine months of 1998 to the first nine months of 1999, as shown in the following tables:

	1998		1999		Change (%)	
	Volume (MT)	Value (million USD)	Volume (MT)	Value (million USD)	Volume	Value
Imports	642,882	2,403	663,577	2,260	+3	-6
Exports	269,882	758	270,812	740.9	0	-2
Net Imports	373,000	1,645	392,765	1,519	+5	-8

Note: Declines in value are exaggerated by the exchange rate changes; the rising dollar makes the decline in dollars larger than it actually was in FF.

French imports of salmon and scallops increased by 15 and 16 percent from the first three quarters of 1998 to the same period of 1999, in value, mainly due to larger quantities of Scottish salmon and scallops from New Zealand. French imports of lobster and crayfish increased by 12 percent in value, with stable volumes of lobster and larger

quantities of crayfish.

Policy

The French Seafood Board (OFIMER) is the French organization in charge of managing the EU budget dedicated to the French seafood sector. OFIMER's actions consist of: (1) seafood supply and demand forecasts; (2) harmonization of species' names, grading and codes; (3) quality incentives; (4) financial support to seafood companies through the European organization fund for seafood companies and the market guarantee fund; and (5) French seafood marketing, through collective market promotions.

Marketing

OFIMER recently opened a Web site on which economic data and OFIMER's detailed activities are available:
<http://www.ofimer.fr>

At OFIMER's request, the national market promotion agency (SOPEXA) conducts marketing activities in France's leading export markets, which are Spain, Germany and Italy. SOPEXA's total budget for seafood promotions is USD 495,000, including 58 percent for Spain, 26 percent for Germany, 3 percent for Italy, and 13 percent for SOPEXA's headquarters in Paris.