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France

Seafood

Seafood Update

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Report Highlights:

A French satirical and investigative newspaper published several articles on the low quality of seafood products sold in France. Date of catch, fish handling and growing sales of farmed fish are listed as the main factors; salmon processing is described.

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

A. Fish Quality Criticized in French Press:

The French satirical and investigative weekly newspaper “Le Canard Enchaîné” recently published a special edition on French food, entitled “What do we eat? Deep survey of our plates.” The tone of the paper is often critical toward the quality of foodstuffs available on the French market, and is consumer-oriented. It covers a wide range of products including meat and poultry, seafood, fruits and vegetables, dairy products, GMO’s, additives and organic products. A summary of “Le Canard Enchaîné” articles on seafood follows.

1. Freshness of Seafood:

Date of Catch:

Finfish can be sold fresh at French retail outlets up to one month after it was caught, and prices vary according to the category of the boat. Prices are 60 to 150 percent higher for finfish caught by small coastal boats, which go fishing for one or two days, than for fish caught by industrial boats, which go fishing for two or three weeks. The price difference is linked to the date of catch; the more recent, the fresher and more expensive the fish.

Fish Handling:

In all boats, fish is put on ice immediately. The longer fish stays on ice, the less fresh it is, because ice burns the fish. Fishes which are the most damaged by handling are cut and filleted to make the product presentable for sale.

There is even more handling of imported products than domestic fish. More than 50 percent of the seafood that arrives in the Rungis wholesale market --by far France’s largest-- is imported. French sanitary inspectors control temperature (5 degrees Celsius maximum) and sanitary labels.

Wild vs Farmed Fish:

Farmed fish is very different from wild fish. The flesh of wild fish is more firm than that of farmed fish. Farmed fish is often fatter and with less flavor than wild fish, because the type of feed provided to farmed fish causes accelerated growth. On the other hand, farmed fish is cheaper and fresher than wild fish, because handling time is reduced.

2. Smoked Salmon:

French Market Trends:

Smoked salmon, which used to be a luxury product, has become a common industrialized product during the past ten years. Self-service purchases currently amount to 13,600 MT, almost double from five years ago. Sales are expected to triple again by 2005. Smoked salmon is available throughout the year at a wide range of prices, from FF 70 to FF 650 per kilogram (1 USD = 6 FF).

Wild and Farmed-Raised Salmon:

Salmon prices vary according to the origin and the quality of the fish, as well as its treatment. Wild salmon is usually more expensive than farmed salmon, which is mass-produced. Scottish and Irish salmon farming conditions are exemplary, while farm production is intensive in Norway. In Norwegian farms, salmon grow twice as fast as in natural conditions: they need two years instead of four to reach six to seven kilograms. This is due to their feed which includes meals enriched with astaxanthine, a synthetic molecule that makes their flesh pink, and treatment with vaccines and antibiotics to prevent epidemics and diseases.

Traditional and Industrial Processing:

While the traditional salmon smoking process takes a whole week, the industrial process needs only one day, including deboning, filleting, and salting. Under traditional methods, salting is done by hand over 15 to 30 hours with dry salt, while smoking is done with a wood fire (oak or beech). In contrast, industrial methods require salting by injection of salted water and smoking with artificial liquid smoke in ovens. Laboratories of the French Fraud Repression Services control these processes, taking samples and detecting 10 to 15 percent of cases which do not conform to regulations. The major problems detected are presence of non-conforming meal residues, over-concentration of phenols, smoke flavor, and the presence of basic volatile nitrogen.

Labeling:

Consumer information on fish for retail sale in France is limited. There are no compulsory labeling requirements differentiating between wild and farm-raised salmon, or for industrial vs traditional smoking processes. Compulsory labels contain the name of the species, the country of origin, the date of packaging, the expiration date for vacuum products, and the list of ingredients. Wild salmon cannot be labeled “never frozen” because since 1991 wild salmon is required to be frozen to eliminate anisakis nematodes which are present in salmon and very dangerous for humans.

B. Salmon Presentations and Retail Prices:

France is the largest salmon consumer in Europe, and salmon is available in great variety in French retail outlets. Post recorded prices for fresh, frozen, canned, smoked salmon and salmon roe in two supermarkets and an outdoor market in Paris during the first week of August, 1998.

1. Fresh Salmon:

Both retail outlets had very limited choice of fresh salmon. There were 200 g packages of salmon fillets with no mention of the origin of the fish, sold at 110 FF/kg (18.30 USD/Kg). In contrast, fresh salmon was widely available in the two fish retailers of the outdoor market. Salmon fillets were sold at 90 FF/kg (15 USD/Kg) and 98 FF/kg (16.30 USD/Kg), with no mention of origin, and 148 FF/Kg (24.70 USD/Kg) for Scottish salmon.

2. Smoked Salmon:

Both supermarkets proposed a large variety of smoked salmon, presented in thin slices in packages of various sizes and weight. Their prices were the following:

Origin	Brand	Weight (g)	Price (FF)	FF per Kg	USD per Kg
Scotland	Hard discount trademark	250	24.95	99.80	16.60
	Brand 1	150	27.95	186.33	31.10
	Brand 3, Label Rouge	160	52.00	325.00	54.20
	Brand 4	100	37.60	376.00	62.70
	Private label gourmet (1)	70	25.90	370.00	61.70
	Private label gourmet (1)	150	47.90	319.33	53.20
	Brand 5	175	78.80	450.29	75.00
Norway	Hard discount trademark	250	22.95	91.80	15.30
	Brand 1	150	24.95	166.33	27.70
	Private label	450	86.40	192.00	32.00
	Brand 2	150	17.60	117.33	19.60
	Private label gourmet (1)	480	122.00	254.17	42.40
	Private label gourmet (1)	100	20.90	209.00	34.80
	Private label gourmet (1)	200	51.00	255.00	42.50
	Brand 5	90	31.00	346.67	57.80
	Brand 6, Label Rouge (2)	150	53.20	354.67	59.10
Atlantic	Brand 3	250	31.00	124.00	20.70
Baltic, Wild	Brand 3	150	60.25	401.60	66.90
Ireland	Brand 3	130	53.00	401.60	66.90
	Brand 5	150	56.00	373.33	62.20

(1) The date of catch and smoking, as well as “cut by hand” are mentioned on the label.

(2) The label comprises the following: “Cut by hand, smoked with beech sawdust, salted with dry salt”

3. Frozen Salmon:

Although Alaskan salmon is sometimes available frozen, there was none in the supermarkets surveyed. Frozen salmon is generally sold in the form of steaks, except for certain prepared product of brand 6.

Origin	Brand	Weight (g)	Price (FF)	FF per Kg	USD per Kg
Norway	Hard discount trademark	250	24.90	99.60	16.60
Atlantic	Private label	100	7.60	76.00	12.70
Unidentified	Brand 6 (1)	400	29.50	73.75	12.30
Unidentified	Private label gourmet	250	28.50	114.00	19.00
Unidentified	Brand 7	250	24.50	98.00	16.30

(1) Salmon prepared with herbs and cooked in foil

4. Canned Salmon:

All canned salmon available in both supermarkets were identified as wild Alaskan salmon. French consumers are not used to purchasing large quantities of canned salmon, and are more used to canned tuna. However, this is a growing niche market.

Brand	Net drained weight (g)	Price (FF)	FF/Kg	USD per Kg
Hard discount trademark	165	7.95	48.18	8.00
Brand 8	128	16.45	128.52	21.40
Brand 9	160	7.10	44.00	7.30

5. Salmon Roe:

All salmon roe found in supermarkets were sourced from “wild Alaskan salmon.” Salmon roe was sold under three brands:

Brand	Product weight (g)	Price (FF)	FF/Kg	USD per Kg
Brand 10	50	30.75	615.00	102.50
Brand 11	50	22.40	448.00	74.70
Brand 11	100	36.80	368.00	61.30
Private label gourmet	100	35.50	355.00	59.20