Acronym: PerformFISH

Title: Consumer-driven production: Integrating Innovative Approaches to Competitive and Sustainable Performance across the Mediterranean Aquaculture Value Chain

Grant Agreement: 727610

Deliverable 5.4

ANALYSIS OF THE FRENCH MARKET FOR SEABASS AND SEABREAM

September 2019

Lead parties for Deliverable: Eurofish International Organisation
Due date of deliverable: 30 September 2019
Actual submission date: 30 September 2019

Dissemination level: PU (Public)

This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 727610. This output reflects the views only of the author(s), and the European Union cannot be held responsible for any use which may be made of the information contained therein.

Table of content

Summary

France is one of the largest, most sophisticated and diverse markets for fish and seafood in the world and is one of the top markets for seabass and seabream products. The size and dynamics of the **apparent market** for those species in France was projected at 22 916 tonnes in 2017. The volume of the French market for seabass and seabream products grew 15% in 2000–2017, making France the fourth largest market for those species globally after Italy, Spain, and Greece. Although the apparent volume of **seabass** available in France declined 11% in 2010–2017, the apparent volume of **seabream** increased 51% in the same period. In 2017, the apparent market for seabass was estimated at 10 112 tonnes, and the apparent market for seabream was assessed at 12 804 tonnes. The share of seabass was 44%, and the share of seabream was 56%.

A distinctive feature of The French market is that it has a larger share of **wild seabass** and **seabream** than other markets, because France has the largest catch of European seabass and Gilthead seabream from the wild, contributing to more than one-third of the total catches of those species in the EU in 2017.

France is also one of the **top importers** of seabass and seabream, importing nearly 19 000 tonnes of those species, valued at EUR 107.3 million in 2017. In 2010–2017, growing import and declining exports of seabass and seabream resulted in additional volumes of those species available on the domestic market, offsetting declines in the national production of aquaculture and capture fisheries, and balancing the volumes available in the market. The French market is **origin-sensitive**, and French consumers differ from their counterparts in other countries in their strong preference for seabass and seabream that is either domestically produced or farmed as close to home as possible. Therefore, the key share of the French import of seabass and seabream originates from EU countries, with **Greece** as the main supplying country, responsible for 53% of seabass and seabream volume imported by French companies in 2017.

Seabass and seabream are the species that have been established over time in the **Ho-Re-Ca** and **household consumption** in France. It is estimated that approximately 51% of seabass and 54% of seabream in the country are consumed in the Ho-Re-Ca sector, whereas 49% of seabass and 46% of seabream are consumed at home. Seabass and seabream are among **top-three** most consumed fresh fish species in the Ho-Re-Ca sector. In the household consumption, seabream is the seventh and seabass is the 15th among the most purchased fresh fish and seafood species in volume. In terms of **production methods**, it has been estimated that in 2017 approximately 75–78% of all seabass available on the market in France was farmed seabass, while the remaining 23–25% was wild seabass. The market share of farmed seabream was projected at 92–94%, and the market share of wild seabream was estimated at 6–7%. In terms of **country of origin**, seabass of French origin had a 36% share of the market, followed by seabass from Greece (31%), Spain (9%), Italy (5%), and other countries. Seabream of Greek origin has a 46% share of the market, followed by seabream of French origin (17%), Spanish (9%), Turkish (8% or more), and Italian (7%).

All French farmers are engaged in the process of **certification** and **quality assurance schemes** for aquaculture products, with the common objective of ensuring consumers a product of highest quality that guarantees food safety, environmental sustainability, and animal welfare.

1 France – Structure of seabass and seabream supply

1.2 Market estimation and development

Based on the analysis of trade and production data, the **apparent market** for seabass and seabream products in France was assessed at 22 916 tonnes in 2017 (live weight equivalent[1]), a 15% increase over 2010 (Figure 1). The dynamics of the apparent market for those species followed mixed trends in 2010–2017, with the highest record of more than 23 100 tonnes reached in 2013, followed by a decline in the following year. After a couple of years of stabilisation, the volume of the apparent market increased in 2017, nearly reaching the 2013 level. During the period assessed, the apparent volume of seabass and seabream on the French market was influenced by the decline in national production and export of seabass and seabream; expanding imports of those species offset the gap in the overall supply of those species on the national market.

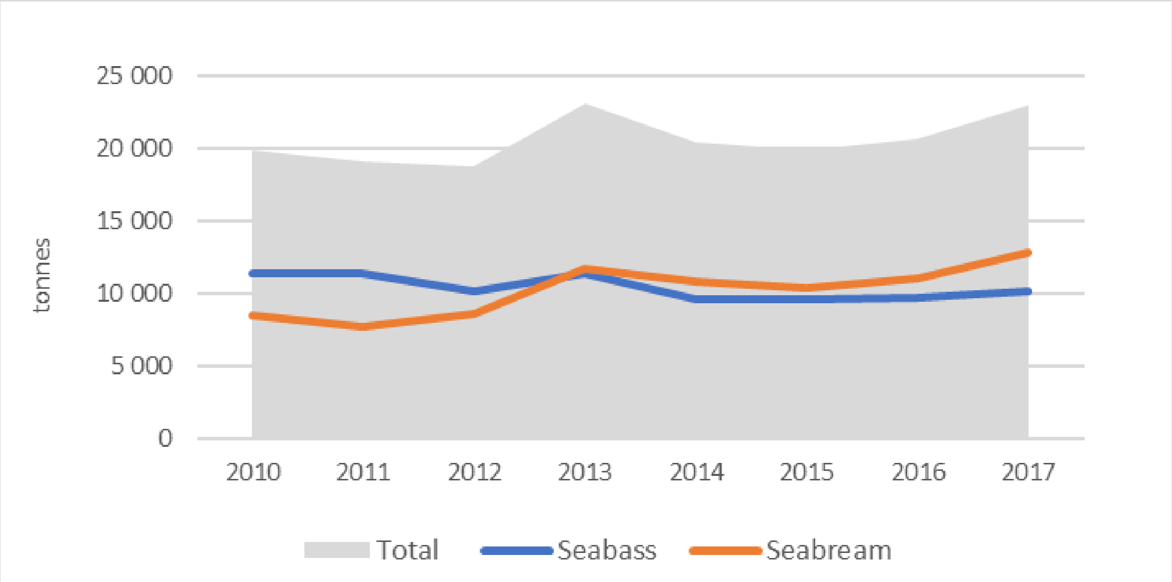


Figure 1. Dynamics of the apparent market for seabass and seabream products in France in 2010–2017. *Source: based on FEAP, SFAMN, and EUMOFA data*

The apparent market for seabass and seabream was affected by **different trends** for those species. Although the apparent volume of **seabass** available in France declined 11% in 2010–2017, the apparent volume of **seabream** increased 51% in the same period. In 2017, the apparent market for seabass was estimated at 10 112 tonnes, and the apparent market for seabream was assessed at 12 804 tonnes. The size of the apparent market for seabass and seabream was calculated based on the sum of the national farmed production of these species, wild catch reported in the country, and the import volume, while deducting the export volume (Tables 1 and 2). Nearly the entire volume of

[1] To obtain live weight equivalent in the reported trade figures, COMEX figures have been multiplied by conversion factors (1.00 for fresh seabass and seabream, and 1.18 for frozen seabass and seabream).

seabass and seabream products in France are traded as **fresh whole** with a minor exception of frozen and value-added products. The share of seabass was 44%, and the share of seabream was 56% in 2017.

Table 1. Apparent market for seabass in France (tonnes)

Seabass	2010	2011	2012	2013	2014	2015	2016	2017
Aquaculture production	2 779	3 000	2 300	1 970	2 021	1 980	1 928	1 945
Fishery production	6 034	5 464	4 990	5 488	4 372	3 428	2 757	2 713
Import	5 336	5 500	4 930	5 963	4 767	5 556	6 110	6 491
Export	2 790	2 568	2 130	2 030	1 608	1 413	1 132	1 037
Apparent market	**11 359**	**11 396**	**10 090**	**11 391**	**9 552**	**9 551**	**9 663**	**10 112**

Source: based on FEAP, SFAMN, and EUMOFA data

Table 2. Apparent market for seabream in France (tonnes)

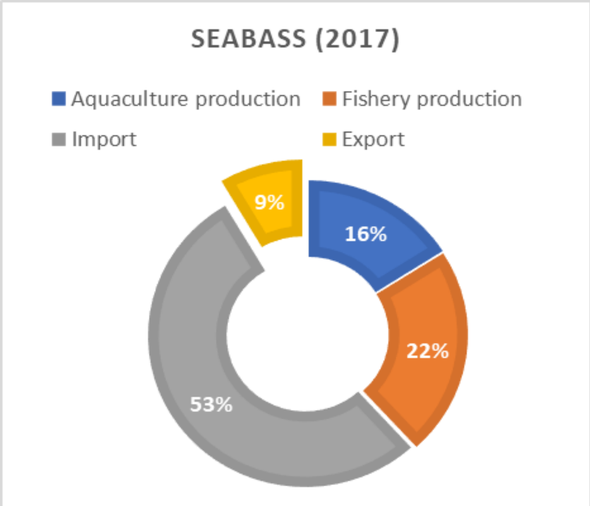
Seabream	2010	2011	2012	2013	2014	2015	2016	2017
Aquaculture production	1 377	1 550	1 300	1 477	1 105	1 502	1 671	1 853
Fishery production	1 215	1 018	696	928	1 198	1 167	851	962
Import	6 937	6 045	7 415	10 090	9 237	8 359	9 099	10 674
Export	1 042	944	785	774	722	692	615	685
Apparent market	**8 487**	**7 669**	**8 626**	**11 721**	**10 818**	**10 336**	**11 006**	**12 804**

Source: based on FEAP, SFAMN, and EUMOFA data

The total volume of seabass and seabream products available on the national market depends largely on the **supply from import**. For seabass, the import supply included 53% of production volume, import and export for seabass products in France. At the same time, it was responsible for 75% in the similar breakdown of shares for seabream in 2017 (Figures 2 and 3). If considering only the supply of those species without the share of export, 58% of seabass and 79% of seabream sold on the market were imported from other countries.

Based on the figures indicated, the **apparent national consumption** of seabass in France declined from 0.18 kg to 0.15 kg per capita in 2010–2017[2]. In the same period, the apparent consumption of seabream strengthened from 0.13 kg to 0.19 kg per capita.

[2] Calculations are based on the records of population census (64.61 million persons in 2010 and 66.77 million persons in 2017); "Total population on 1st of January France, including Mayotte since 2014", The National Institute of Statistics and Economic Studies of France, https://www.insee.fr/en/statistiques/serie/001641586



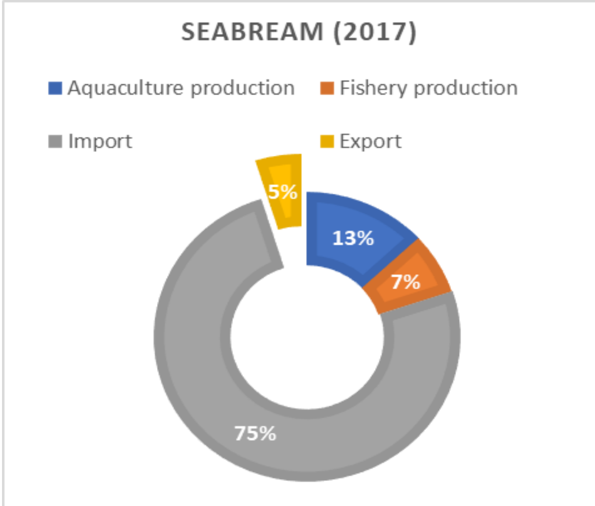


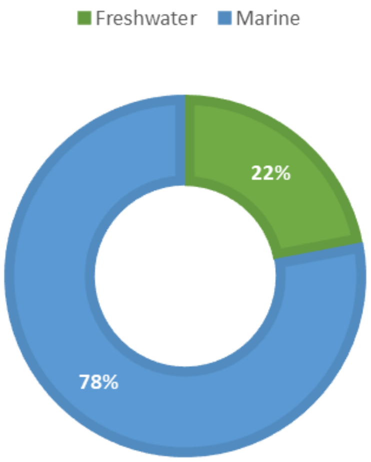
Figure 2 (left) and 3 (right). Shares of proportions of production volume, import and export for seabass and seabream products in France (2019). *Source: based on FEAP, SFAMN, and EUMOFA data*

1.3 Local supply from aquaculture

1.3.1 National aquaculture production

The French aquaculture industry is an **old** and **established sector**, dating back to the Middle Ages when the principles of fish-farming techniques were established and, gradually, an extensive fish culture was developed in many ponds. Farming of salmonids and artificial reproduction of trout took off at the end of the 19th century, and the 20th century saw the development of French freshwater fish farming. Although Norway was a pioneer in salmon farming in the 1970s, the biological cycle of seabass and seabream was completed by French scientists who initiated trials in the south of France. French companies began breeding seabass, seabream, and turbot in the 1980s, and the rapid advancement of technology, coupled with strong demand from niche and affluent markets, provided strong support for the country's marine fish-culture sector.

Currently, France is one of the **leading European nations** in the volume of aquaculture product produced, the quality of its system of education and research, and the support of producers' organisations. In 2017, the total output of the French aquaculture sector amounted to 166 000 tonnes, valued at USD 701 million (EUR 637 million), according to FAO data. The most important production sector is shellfish farming, which accounts for approximately 75% of the total production volume, followed by trout, carp, seabass, roach, and seabream.



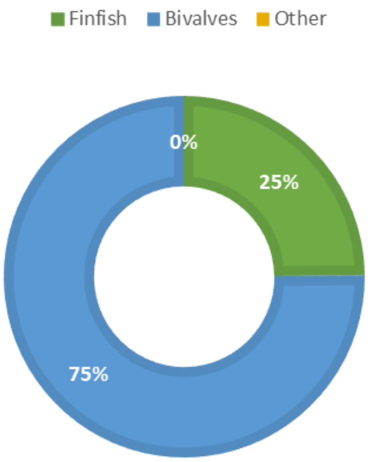


Figure 4 (left) and 5 (right). Shares of French aquaculture volume output by environmental type and group in 2017. *Source: FishstatJ, FAO*

Of the total volume of aquaculture production in France in 2017, approximately one-fifth (22%) consists of **freshwater species**, whereas nearly four-fifths (78%), or approximately 130 000 tonnes, is composed of **marine species** (including bivalves). For **freshwater aquaculture**, the sector is divided in two segments: salmonid farming, with rainbow trout as the leading species, followed by pond fish farming of different species, such as carp, roach, and tench (Figures 4 and 5).

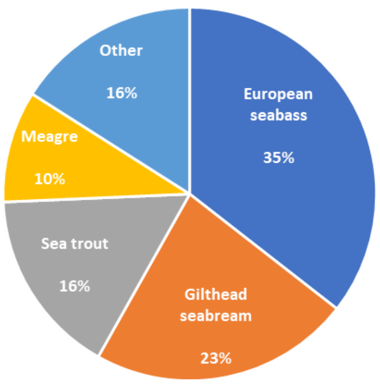


Figure 6. Distribution of marine fish-farming production volume, 2017. *Source: Fishstat, FAO*

Marine finfish farming totalled 6 388 tonnes in 2017, with seabass and seabream accounting for more than 59% of the production (Figure 6). In addition to growing finfish, juvenile production is also important, with 107 million seabass and seabream juveniles produced in 2017. Nearly 90% of the sales of juveniles are exported.

France is characterised by a great diversity of species and fish-farming systems (hatcheries, grow-out sites on land and in ponds, and cages at sea). There is an important difference in the production systems:

- **Marine and freshwater fish** are reared in raceways, ponds, tanks, and cages, except carp and cyprinids, which are raised in dams, lakes, and reservoirs.
- **Crustaceans** (tropical shrimp) are cultured in earthen ponds.

- **Molluscs** are reared along the coast in bays, rias, and lagoons, on suspended longlines, racks, posts, or directly on the seabed[3].

Further development of marine aquaculture is somewhat limited because access to farming locations is limited. Local authorities in coastal regions favour the development of the tourism sector over the establishment of new aquaculture sites or are constrained in maintaining open access to offshore waters.

1.3.2 Production of farmed seabass and seabream

Seabass and seabream are the most farmed species in French marine aquaculture, accounting for more than two-thirds of the total production of farmed fish. Most of the French Mediterranean coast and its island territories largely allow the breeding of seabass and seabream through the seawater's physical and chemical characteristics necessary to carry out this activity, including temperature range, salinity, and other factors.

In recent years, the evolution of production revealed **diverse trends** for seabass and seabream production, reaching comparatively similar levels of close to 2 000 tonnes for each species in 2017. In 2010–2017, production of seabass followed a declining trend of 30%, amounting to 1 945 tonnes in 2017. In contrast, production of seabream increased 35% in the same period, reaching 1 853 tonnes in 2017 (Figure 7).

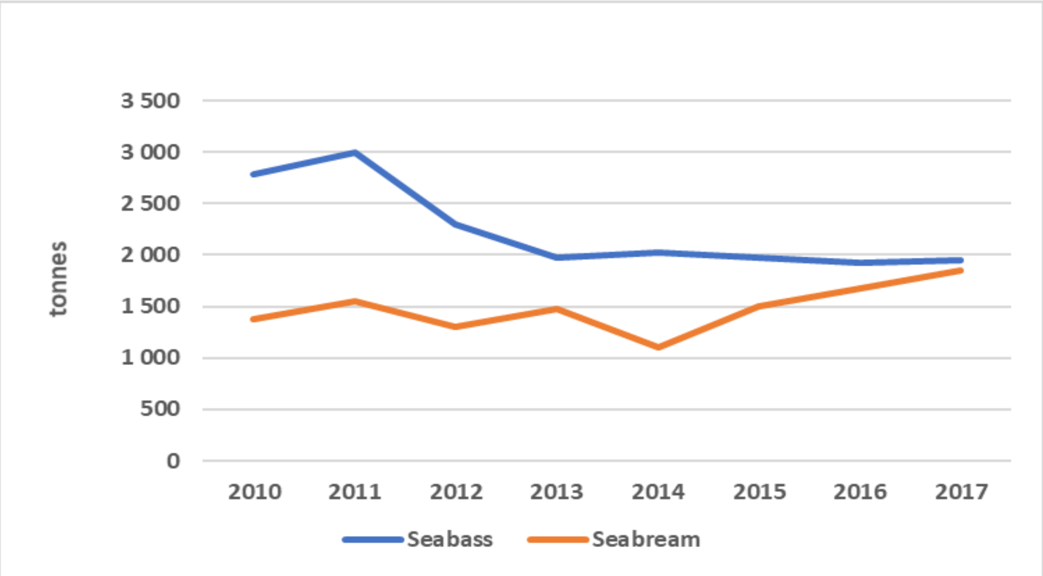


Figure 7. Dynamics of farmed seabass and seabream production in France. *Source: FishstatJ, FAO*

[3] FAO National Aquaculture Sector Overview, France

1.3.3 Structure of the aquaculture sector

This generation of French aquaculture farmers are experts in their field, and they have been pioneers in the sector controlling reproduction, rearing larvae, and growing juveniles. All existing companies were created between 1980 and 1990, with no new authorisation of start-ups since then (except one in 2014).

According to FranceAgriMer, marine aquaculture takes place at 26 marine sites by 23 different companies. Seabass and seabream are reared close to the North Sea (utilising heated water from a nuclear power plant), along the Atlantic coast, and in the Mediterranean (Côte d'Azur and Corsica). The companies have followed a consolidation strategy of the sector in recent years, emphasising strong development capabilities.

- Seabass production in 2017: 1 945 tonnes
- Seabream production in 2017: 1 853 tonnes
- Production of seabass and seabream juveniles: 107 million

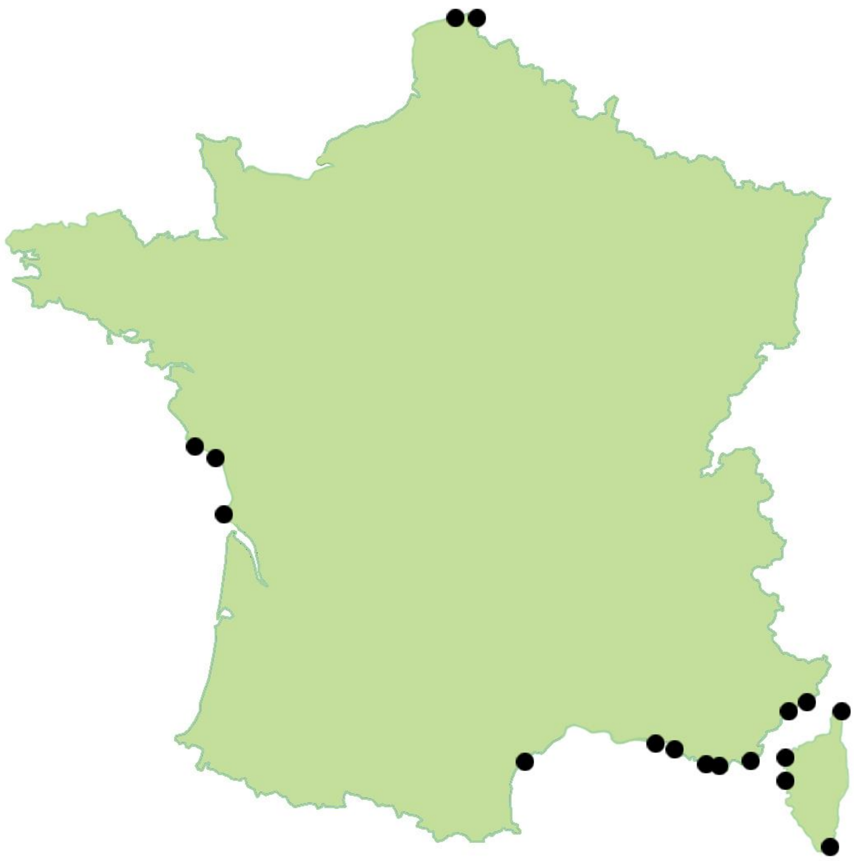


Figure 8. Geographical distribution of companies farming seabass and seabream. *Source: FranceAgriMer*

1.3.4 Production techniques of seabass and seabream

Seabass and **seabream** are cultured utilising the main technologies:

- Flow-through in concrete raceways (seabass);
- Highly recirculated systems in tanks (seabass);
- Cage culture for seabass, seabream, and red drum, mainly in Mediterranean waters, including Provence Côte d'Azur, Corsica, and in tropical areas around Mayotte and La Réunion.

Moreover, production of seabass and seabream in ponds on land in the north of France is made possible using warmed water.

Photo 1. Production of seabass and seabream in cages. *Source: CIPA*

The cages are of different shapes at different sites. Photo 1 shows round cages with floats and nets with diameters between 12 and 19 m. The cages are fixed by anchors and weights tying the cages to the ground in a grid. The cages are sufficiently spaced to prevent collision with the large forces of the sea. There are also 6 x 6 m square cages surrounded by floating rafts. According to the breeders, the maximum density is 20 kg/m^3. Fry between 3 and 10 g are raised here to market size.

Photo 2. Production of seabass and seabream. *Source: CIPA*

Photo 2 shows another type of aquaculture farm located close to the coast and surrounded by wooden pontoons. This allows easier access and greater safety for the work undertaken around the cages. This site also accommodates visits from the public to exhibit the product and the world of fish farming (Photo 3).

Photo 3. Production of seabass and seabream. *Source: CIPA*

1.3.5 Consumption of aquaculture fish feed

Detailed figures of fish-feed consumption are not available; however, it is estimated that 12 000 tonnes of fish feed are used in France for all farmed production, including freshwater species. The production of seabass and seabream in cages at sea is a seasonal activity, with fish being fed from May to November. During the other months, fish are fed at a minimum, so they do not lose weight when the water is cold.

Land-based sites allow year-round feeding because controllable temperatures provide more stable production throughout the year. The feeding intensity depends on the policies followed by each company.

Feed incorporating fishmeal and fish oil from low-value species makes it possible to benefit from important nutrients in species not consumed by humans and species whose fisheries are managed by quotas, ensuring the sustainability of the resource. Feeding farmed fish fishmeal and fish oil optimises growth.

However, to ensure the sustainability of fish farming, several research programmes (through INRA, Ifremer, and universities) are exploring the replacement of fishmeal and fish oil with plant-based alternatives while maintaining the nutritional qualities and taste and texture characteristics of the fish. Research has already helped substitute some meal and fish oil.

According to research from the label “Aquaculture de Nos Régions”, feed today can consist of:

- 60–80% plant-based material (soy, corn, peas, wheat, rapeseed, etc.) in the form of meal and oil;
- 20–40% meal and oil from fish;
- Vitamins and minerals essential to optimal growth (including vitamins A, D3, E, C, and those of the B group).

Experts have found that a balanced diet, rich in proteins and respectful of the natural cycle of the species, will increase the growth rate of farmed fish. The continued increase in aquaculture production, with the substitution of raw material, will allow farmed fish to exceed capture fisheries by the end of 2020. Research organisations and experts continue to explore many possibilities, aware of the issues and their responsibility to ensure that, tomorrow, there will be enough fish for all. The aquaculture industry is growing and overtaking the fishing industry, without straining the resources. A similar development utilises new raw material, such as insects, microalgae, etc., for fish-feed production.

1.3.6 Fish juveniles

France led aquaculture development by completing the biological cycle of seabass and seabream in the 1970s; it has been breeding the species since then, giving French hatcheries many years of experience and expertise in juvenile production. Consequently, France accounts for 8.74% of the Mediterranean production of seabass and seabream juveniles, because the high quality of its juveniles – making use of genetic selection, high survival and growth rates, and optimal health aspects – has been recognised.

Juvenile production requires great technical knowledge, which is not easily transferable. Because of this, French hatcheries produce juveniles for farms in other countries. This know-how is only transferred to countries located too far away for direct delivery of juveniles, such as Asia and the Middle East. This sector focuses largely on exports, and France exports up to 90% of its production of juvenile seabass and seabream. According MedAqua (FEAP), France exported 85% of seabass juveniles, worth close to EUR 7 million in 2017 and distributed as follows: Spain (34%), Italy (23%), Greece (12%), Portugal (8%), other EU countries (15%), and non-EU countries (8%).

According MedAqua (FEAP), France exports 92% of seabream juveniles valued at more than EUR 16 million and distributed as follows: Spain (14%), Greece (14%), Italy (12%), Portugal (9%), other EU countries (16%), and non-EU countries (35%). North African markets represent an important future direction for French juvenile export, because the need for protein, at a price acceptable to the population, is becoming a priority for countries such as Tunisia and Algeria. This development will also spread to other countries such as Libya and Morocco.

1.4 Local supply from the wild

Globally, France lands the **largest catch** of European seabass and Gilthead seabream from the wild. In 2017, the national catch of seabass and seabream species reached 3 675 tonnes, making up one-fifth of the total catch of European seabass and Gilthead seabream (Figure 9).

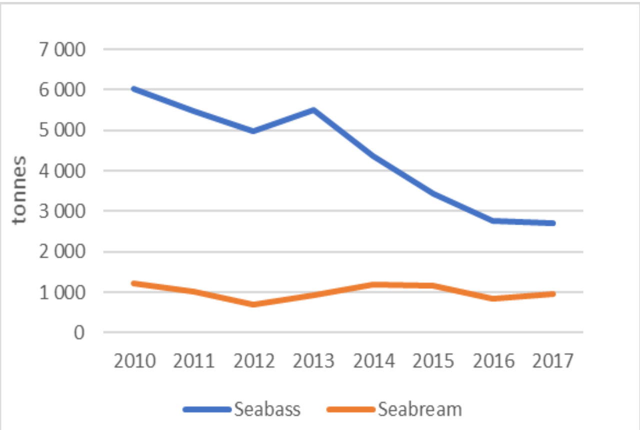


Figure 9. National catches of wild seabass and seabream in 2010–2017. *Source: FishSTATJ 2019, FAO*

The dynamics of the national supply of wild seabass and seabream has been following a **declining trend**, falling 49% in 2010–2017. Of this volume, the greatest decline was attributed to catches of seabass, which dropped from 6 034 tonnes to 2 713 tonnes, while catches of seabream declined from 1 215 tonnes to 962 tonnes in the same period.

On the EU level, France contributed more than one-third (38%) of the total catches of seabass and seabream from the wild in 2017.

2 Trade in seabass and seabream products

France is **a net importing country** of fishery and aquaculture products, with most trade occurring with the EU-28. Production of seabass and seabream, originating from both aquaculture and fisheries, is not enough to satisfy the demand for those species, and the supply of most seabass and seabream is provided by imports.

Like other major European economies, France has returned to slow but steady growth, which was reflected in growing import of seabass and seabream. In 2010–2017, French import of those species increased 17%, reaching 19 000 tonnes in 2017. Approximately half of the volume of the imported seabass and seabream consisted of farmed species from Greece, which is considered the product most in demand by French consumers in terms of origin of imported species, along with Italian and Spanish species. At the same time, French export of seabass and seabream declined 44% in 2010–2017 to 1 723 tonnes (Figure 10). The major part of the exported volume, especially seabass, consisted of wild species from national capture fisheries.

Growing import and **declining export** of seabass and seabream in the past several years have resulted in additional volumes of the species in the French market, **offsetting declines** in the national production from aquaculture and capture fisheries, and **balancing the volumes** available in the market.

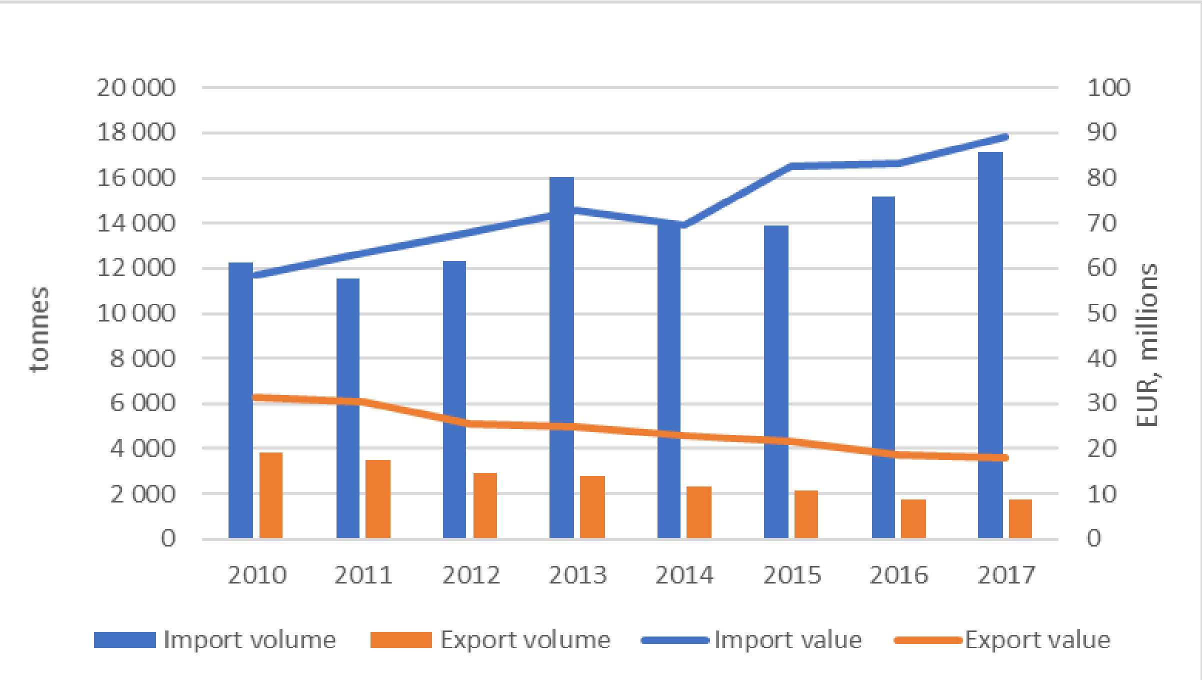


Figure 10. Dynamics of seabass and seabream trade in France. *Source: EUMOFA*

2.1 Import development

France is one of the top importing countries of fishery and aquaculture products in the EU and one of the top importers of seabass and seabream. In 2017, French import of seabass and seabream reached nearly 19 000 tonnes, valued at EUR 107.3 million (Figure 11). In 2010–2017, the import volume grew 17%, whereas the import value surpassed it, increasing 19% in the same period.

Interestingly, French import of seabass and seabream species followed different tendencies. Although the French import of seabass declined 7% from 8 130 tonnes to 7 530 tonnes in 2010–2017, in contrast, French import of seabream increased 42% from 7 980 tonnes to 11 360 tonnes. Correspondingly, the value of French import of seabass declined 2%, whereas the value of French import of seabream grew 49%. This opposite trend is attributed mainly to stronger consumer preference for seabream over seabass; a similar trend is reflected in the French export of seabass, which surpassed the export of seabream.

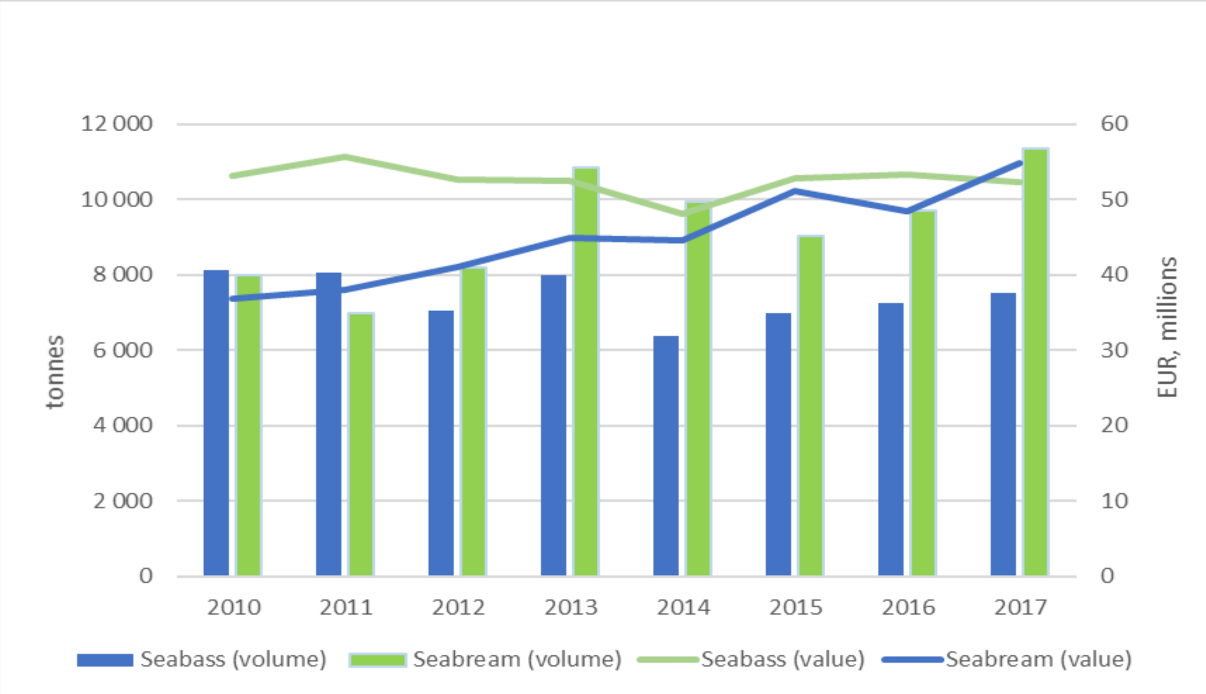


Figure 11. Dynamics of seabass and seabream import into France. *Source: EUMOFA*

Table 3. Development of French import of seabass and seabream products

	2010	2011	2012	2013	2014	2015	2016	2017
Seabass (tonnes)	8 126	8 069	7 061	7 993	6 374	6 973	7 251	7 528
Seabream (tonnes)	7 979	6 989	8 200	10 864	9 959	9 052	9 721	11 359
Seabass (EUR, thousands)	53 244	55 686	52 588	52 554	48 088	52 892	53 377	52 376
Seabream (EUR, thousands)	36 807	37 986	41 037	45 001	44 543	51 190	48 427	54 929

Source: EUMOFA

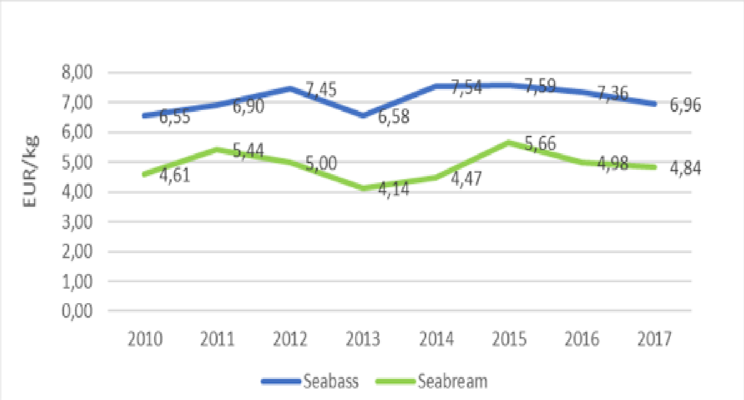


Figure 12. Development of average annual import price of seabass and seabream products into France. *Source: EUMOFA*

In 2010–2017, the **average annual import price f**or seabass increased from EUR 6.55 to 6.96 per kg, with the highest peak at EUR 7.59 per kg in 2015.

The average annual import price for seabream increased from EUR 4.61 to 4.84 per kg in the same period, with the highest record of EUR 5.66 per kg in 2015 (Figure 12).

In terms of the supplying countries, most of the French import of seabass and seabream (approximately 80–85%) originates from EU countries. **Greece** was the main supplying country, responsible for 53% of seabass and seabream imported by French companies in 2017. However, its share in the total French import of seabass and seabream products declined from its 68% share in 2010. It should be noted that the French market is **origin-sensitive**, and French consumers differ from their counterparts in Mediterranean countries in their strong preference for seabass and seabream that is either domestically produced or grown as close to home as possible. For French consumers, the closer the source of produce, the better, and if buying imported fish at all, they would much sooner buy fish from Greece, Spain, or Italy than from countries outside the EU. However, seabass and seabream form Turkey, previously largely avoided by French consumers, started to be readily available on the French market, increasing direct and non-direct export to France[4].

The **Netherlands** is the next largest supplier of seabass and seabream products to the French market, where Dutch companies re-export mostly Greek and Turkish seabass and seabream to many other markets. Deliveries of seabass and seabream through the Netherlands has been increasing rapidly, and it is assumed that this rapid growth can be attributed mainly to products from Turkey, because the Netherlands has become Turkey's top European market, importing large whole fish as well as fillets. French import of seabass and seabream products from the Netherlands went up from 430 tonnes to more than 2 230 tonnes in 2010–2017.

Spain used to be the second largest supplier of seabass and seabream to the French market until 2017, when it was overtaken in volume by Dutch companies. In 2017, French traders imported 2 070 tonnes of seabass and seabream products from Spain, maintaining a relatively stable volume with a slight declining tendency in 2010–2017.

In contrast, **Italian** companies have continued to increase their supply of seabass and seabream to the French market in the past several years. Although in 2010 French import of seabass and seabream from Italy amounted to some 400 tonnes, deliveries from Italy have started to double since 2013 and exceeded 1 430 tonnes in 2017.

[4] Based on several market reports, including "Seabass and Seabream", Globefish, FAO

Table 4. Import of seabass and seabream into France from partner countries (tonnes)

	2010	2011	2012	2013	2014	2015	2016	2017
Greece	8 384	8 223	7 669	9 791	8 472	7 268	7 962	9 026
Netherlands	432	382	479	974	1 139	2 123	1 869	2 232
Spain	2 232	1 955	2 999	3 606	2 564	2 623	2 402	2 069
Italy	412	384	331	843	1 027	1 089	1 063	1 438
Turkey	21	0	47	45	58	27	620	1 427
Other	793	602	820	794	744	787	1 301	974
Totals	**12 273**	**11 546**	**12 345**	**16 053**	**14 003**	**13 916**	**15 217**	**17 165**

Source: EUMOFA

Direct import of seabass and seabream from **Turkey** to the French market intensified from 20 tonnes in 2010 to more than 1 430 tonnes 2017, extending the geographical scope of the countries supplying seabass and seabream products to the French market (Figure 13).

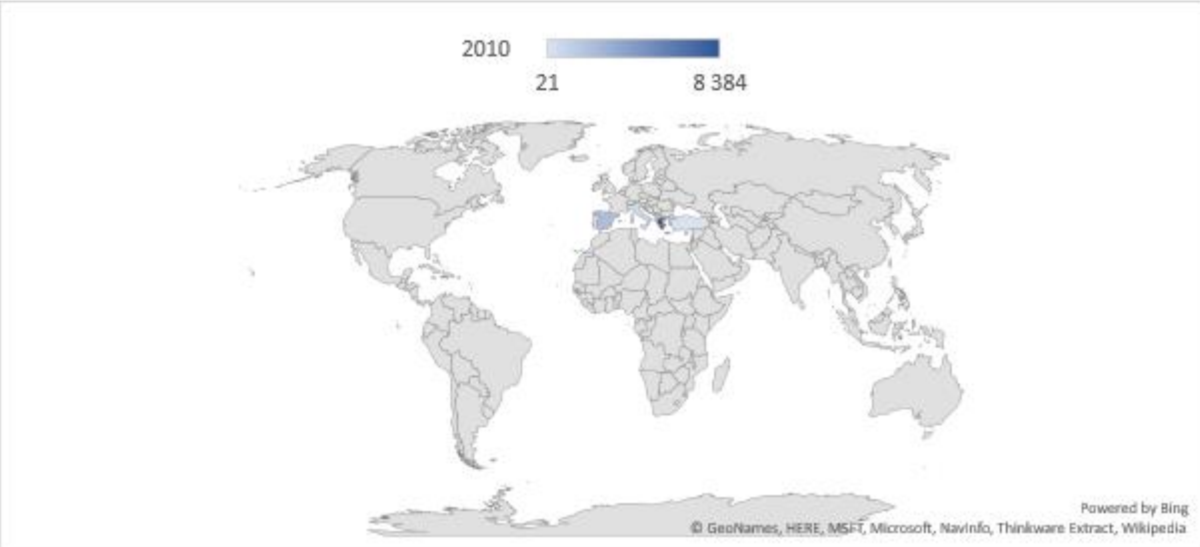
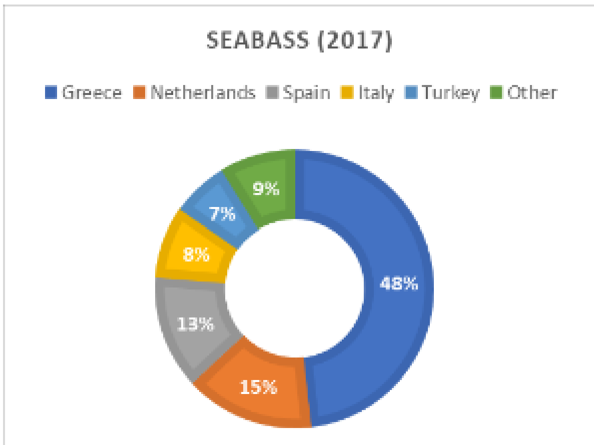


Figure 13. An illustration of geographical locations of the top partner countries for French import of seabass and seabream products (tonnes, 2017). *Source: based on EUMOFA data*



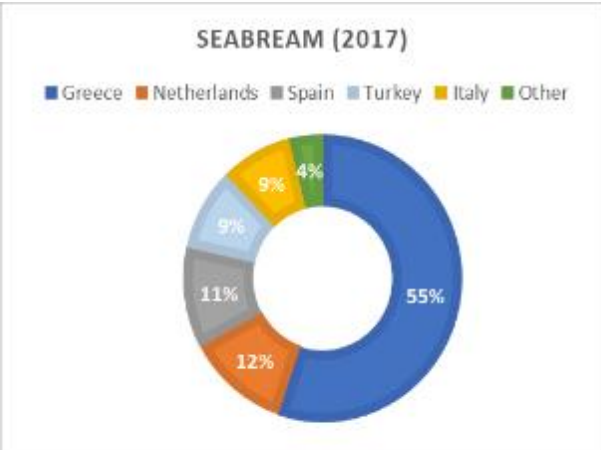


Figure 14 (left) and 15 (right). Shares of top countries for French import of seabass and seabream products in 2017. *Source: based on EUMOFA*

In total, French import of **seabass** reached 6 500 tonnes in 2017, growing 22% in 2010–2017. Of the countries-suppliers of seabass and seabream to the French market, **Greece** was responsible for 48% of seabass and 55% of seabream imports. French import of seabass from Greece maintained a relatively stable tendency, with a slight decline from 3 504 tonnes to 3 130 tonnes in 2010–2017. French import of seabass via the **Netherlands** tripled in the same period and reached 965 tonnes in 2017. Import of seabass from **Spain** rose in 2010–2013, with a subsequent declining trend, falling to 860 tonnes in 2017. Import of seabass from Italy doubled in the same period, exceeding 540 tonnes in 2017. Despite significant consumer resistance to the attractively priced Turkish fish, French importers began to show signs of following their European counterparts with imports from **Turkey**, which started with a few tonnes several years ago and reached nearly 430 tonnes in 2017 (Figures 14 and 15).

Table 5. French import of seabass from partner countries (tonnes)

	2010	2011	2012	2013	2014	2015	2016	2017
Greece	3 504	3 656	2 937	3 117	2 187	2 476	2 903	3 130
Netherlands	371	287	281	542	550	936	666	965
Spain	664	859	1 022	1 381	1 020	1 149	1 250	860
Italy	245	179	132	380	437	430	387	543
Turkey	15	0	45	37	35	17	117	428
Other	537	520	514	507	538	548	790	565
Totals	**5 336**	**5 501**	**4 931**	**5 963**	**4 767**	**5 556**	**6 113**	**6 491**

Source: EUMOFA

French import of **seabream** increased to 10 675 tonnes in 2017, growing 54% in 2010–2017. Unlike import of seabass, French import of seabream from **Greece** followed an upward tendency, growing from 4 880 tonnes to nearly 5 900 tonnes in 2010–2017. Import of seabream from **Dutch** companies multiplied from 60 tonnes in 2010 to nearly 1 270 tonnes in 2017. Like seabass, French import of seabream from **Spain** followed an increasing trend in 2010–2013, with a subsequent declining tendency ending at 1 209 tonnes in 2017. Shipments of seabream by Turkish companies to France multiplied in recent years, reaching nearly 1 000 tonnes in 2017. Italian companies increased their shipments of seabream to France from 167 tonnes to 895 tonnes in 2010–2017.

Table 6. French import of seabream from partner countries (tonnes)

	2010	2011	2012	2013	2014	2015	2016	2017
Greece	4 880	4 568	4 732	6 675	6 285	4 792	5 059	5 896
Netherlands	61	95	198	432	589	1 186	1 203	1 267
Spain	1 567	1 096	1 977	2 225	1 544	1 473	1 152	1 209
Turkey	6	0	2	8	24	10	503	998
Italy	167	205	199	463	590	658	676	895
Other	256	82	306	287	206	239	511	409
Totals	**6 937**	**6 046**	**7 415**	**10 090**	**9 237**	**8 359**	**9 104**	**10 674**

Source: EUMOFA

2.2 Export development

A significant part of the French export of seabass and seabream consists of **wild species**. Because the national catch of those species has been decreasing, French export of seabass and seabream followed a **declining trend** in 2010–2017. In total, French export of seabass and seabream declined from 3 833 tonnes to 1 723 tonnes in the same period. Accordingly, export value of the species declined from EUR 31.5 million to EUR 18.2 million.

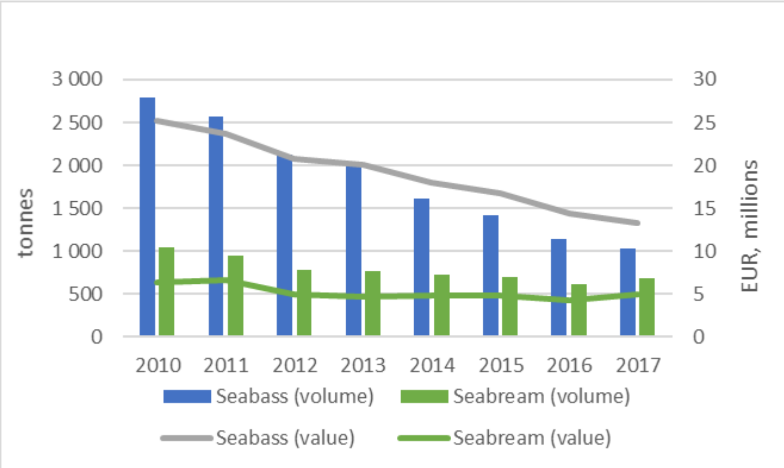


Figure 16. Dynamics of seabass and seabream export from France. *Source: EUMOFA*

In 2010–2017, export of **seabass** from France declined from 2 780 tonnes to 1 037 tonnes, with the export value down from EUR 25.2 million to EUR 13.2 million accordingly. Export of **seabream** decreased from 1 042 tonnes to 686 tonnes, with the export value down from EUR 6.3 million to EUR 4.9 million (Figure 16).

Table 7. Development of French export of seabass and seabream products

	2010	2011	2012	2013	2014	2015	2016	2017
Seabass (tonnes)	2 791	2 568	2 131	2 030	1 608	1 416	1 138	1 037
Seabream (tonnes)	1 042	944	785	774	722	692	617	686
Seabass (EUR, thousands)	25 231	23 706	20 713	20 062	18 064	16 694	14 358	13 225
Seabream (EUR, thousands)	6 305	6 594	4 959	4 755	4 833	4 910	4 275	4 942

Source: EUMOFA

The dynamics of the **average annual export price** showed a positive trend for both seabass and seabream. The average annual export value of seabass increased from EUR 9.04 to EUR 12.75 per kg in 2010–2017, whereas the average annual export price for seabream grew more slowly, from EUR 6.05 to 7.05 per kg in the same period, reaching highest levels in 2017 for both species

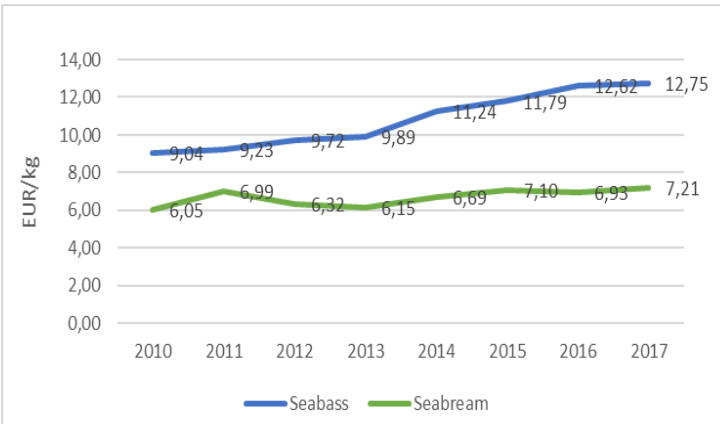


Figure 17. Development of average annual export price of seabass and seabream products into France. *Source: EUMOFA*

Western European countries constitute the main markets for French seabass and seabream products. **Italy** is the largest market for French export of those species, with some 400 tonnes in 2017. Since 2010, French export of seabass and seabream to Italy has diminished considerably because most shipments were of wild seabass. Reflecting the decline in the national supply of wild seabass, French export of seabass to Italy went down; other countries-destinations for French export of seabass and seabream received reduced volumes. **Belgium**, **Switzerland**, and **Germany** are the next main markets for French export of seabass and seabream after the Italian market with 260 tonnes, 230 tonnes, and 220 tonnes, respectively. The **UK**, **Spain**, and **Ireland** are among other destinations for the French export of seabass and seabream.

Table 8. Export of seabass and seabream from France to partner countries (tonnes)

	2010	2011	2012	2013	2014	2015	2016	2017
Italy	1 242	1 082	798	936	637	548	448	403
Belgium	510	422	382	412	379	338	282	257
Switzerland	432	474	335	103	144	166	161	229
Germany	295	251	258	320	347	287	202	223
UK	609	678	489	397	277	196	176	147
Spain	311	213	188	202	194	150	151	138
Ireland	64	73	77	55	48	120	104	133
Other	371	318	389	378	303	304	230	192
Totals	**3 833**	**3 512**	**2 915**	**2 803**	**2 330**	**2 109**	**1 755**	**1 723**

Source: EUMOFA

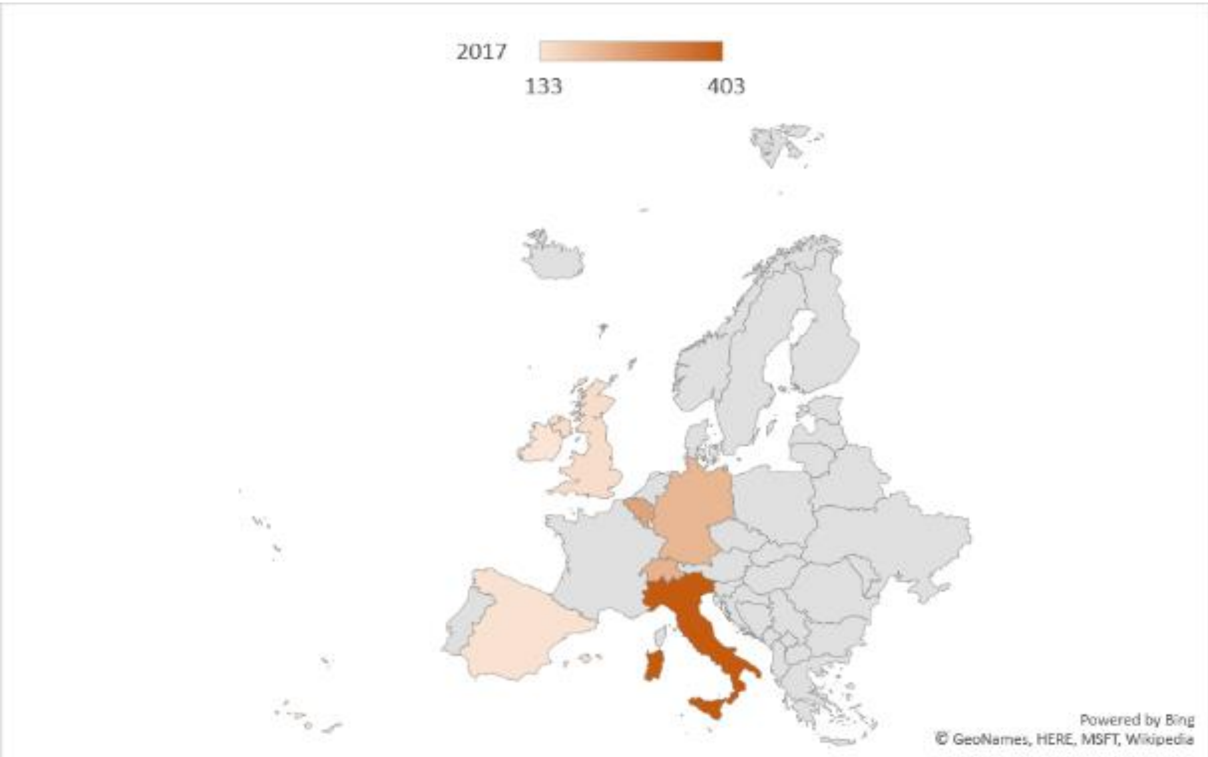


Figure 18. The geographical location of the top partner countries for French export of seabass and seabream products (tonnes, 2017). *Source: based on EUMOFA data*

In 2010–2017, French **export of seabass** declined from 2 791 tonnes to 1 037 tonnes. In 2017, Italy had a 22% share in the total export of seabass from France, followed by Switzerland (15%), Germany (15%), the UK (12%), Belgium (10%), and Spain (9%). French export of **seabream** also followed a declining tendency, dropping from 1 042 tonnes in 2010 to 686 tonnes in 2017. As with seabass, Italy was the main market for French seabream with a 26% share in the total export of seabream from France, followed by Belgium (22%), Germany and Switzerland (10%), Ireland (8%), Luxemburg (7%), and Spain (7%; Figures 19 and 20).

Table 9. French export of seabass to partner countries (tonnes)

	2010	2011	2012	2013	2014	2015	2016	2017
Italy	1 002	807	636	752	468	378	292	226
Switzerland	352	426	255	85	138	147	116	160
Germany	165	153	185	222	234	213	138	152
UK	434	514	369	308	218	166	153	123
Belgium	272	218	209	221	188	160	123	107
Spain	281	185	171	174	163	123	116	92
Other	284	266	307	268	198	230	200	178
Totals	**2 791**	**2 568**	**2 131**	**2 030**	**1 608**	**1 416**	**1 138**	**1 037**

Source: EUMOFA

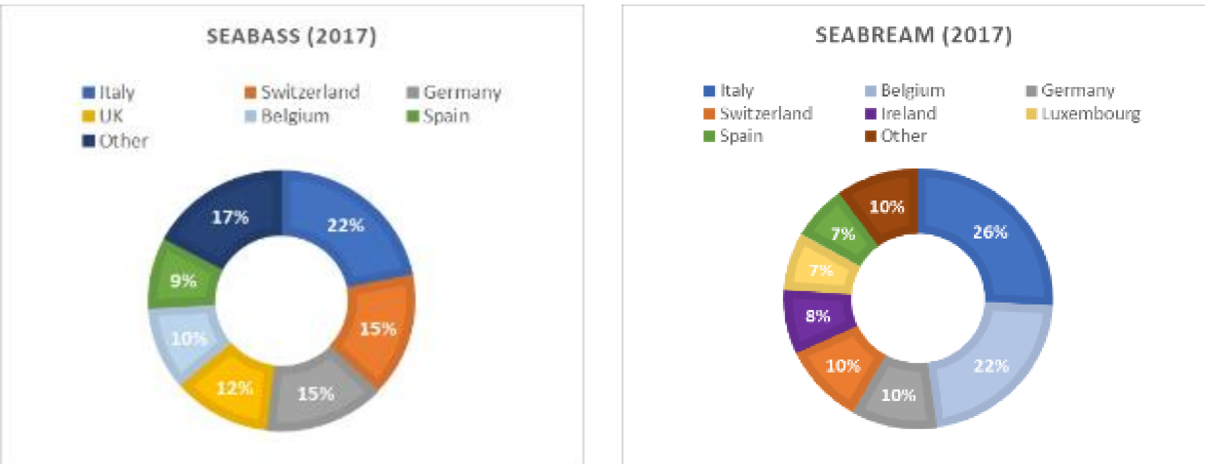


Figure 19 (left) and 20 (right). Shares of top countries for French export of seabass and seabream products in 2017. *Source: based on EUMOFA*

Table 10. French export of seabream to partner countries (tonnes)

	2010	2011	2012	2013	2014	2015	2016	2017
Italy	240	275	162	184	170	170	156	177
Belgium	238	204	173	191	191	179	159	150
Germany	130	99	73	98	113	73	64	71
Switzerland	80	48	80	18	6	20	45	69
Ireland	2	3	31	25	23	41	31	55
Luxembourg	61	51	65	65	66	79	51	49
Spain	29	29	18	28	31	26	35	47
Other	261	235	184	164	123	104	76	68
Totals	**1 042**	**944**	**785**	**774**	**722**	**692**	**617**	**686**

Source: EUMOFA

3 Supply chain and the processing industry

3.1 General supply chain for fish and seafood

Figure 21 provides a general structure of the **supply chain** for fish and seafood products, including seabass and seabream. It is made up of the national production segment, including fisheries and aquaculture, and supply of imported species. Supply volumes from domestic production are further delivered to auctions and the wholesale system, with some distributed to processing. The distribution chain extends to the retail sector, including modern and tradition sales channels and the Ho-Re-Ca sector, including restaurants and catering channels.

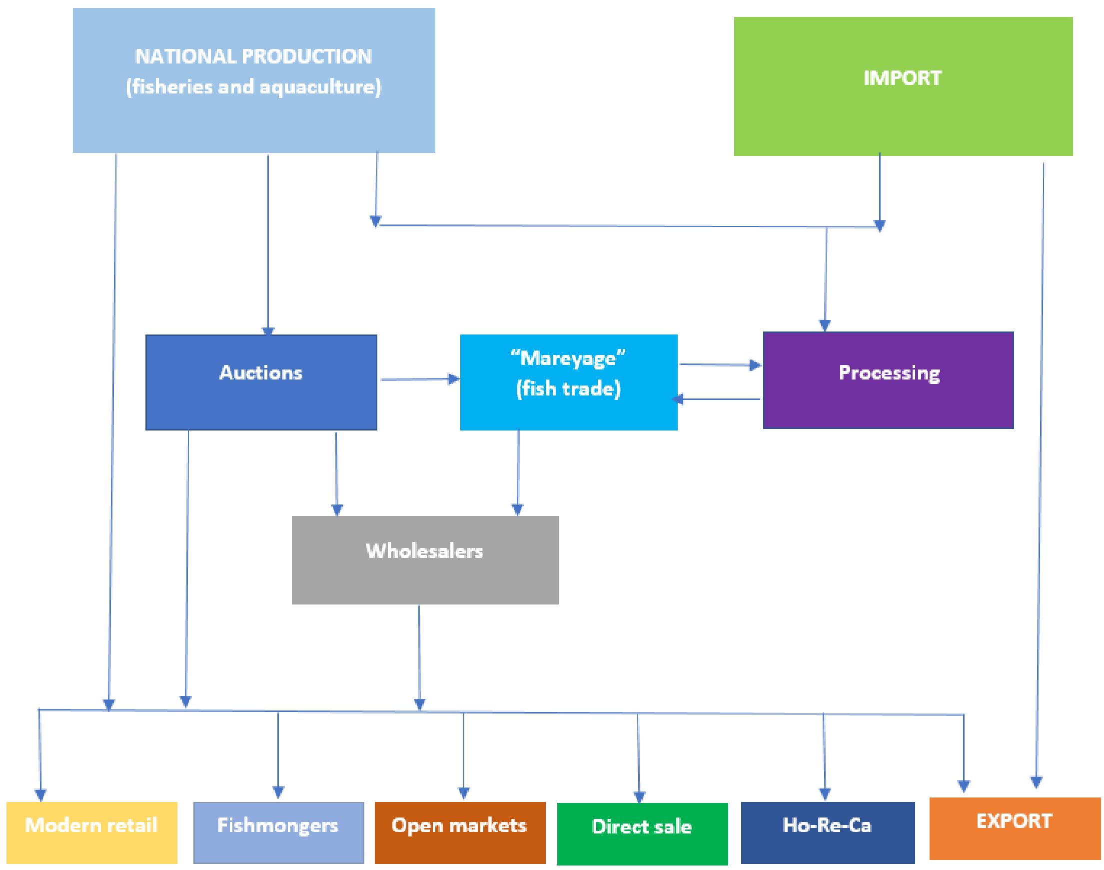


Figure 21. The supply chain of fishery and aquaculture products in France. *Source: based on FranceAgriMer*

3.2 Processing sector

France is the second most important processing country in the EU after Spain, with EUR 3.75 billion generated in processing sales in 2014 (EUMOFA, 2016). In total, the structure of the fish processing sector included 199 processing companies providing 13 996 jobs[5].

In terms of geographic location of the processing companies, the regions of Brittany, Hauts-de-France, Atlantic coastline, and Mediterranean Sea have the largest number of establishments (Figure 22).

The key categories of the fish and seafood processing output in net sales included salted, smoked, and dried products (32%), canned product without cooked meals (32%), cooked meals and fish sticks (18%), fresh, frozen, and whole products (16%), and other types of products, including liquid products, co-products, and other, in 2017 (Figure 23).

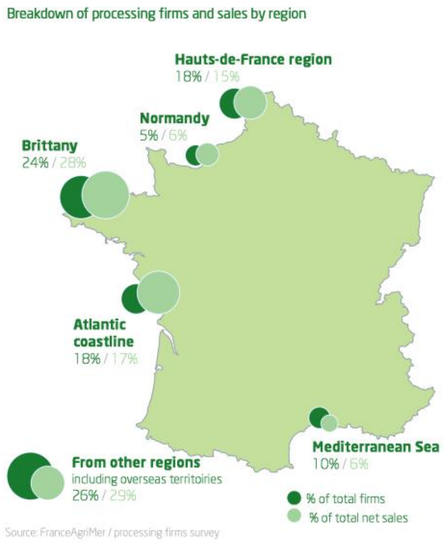


Figure 22. Breakdown of processing enterprises and net sales by region. Source: FranceAgriMer

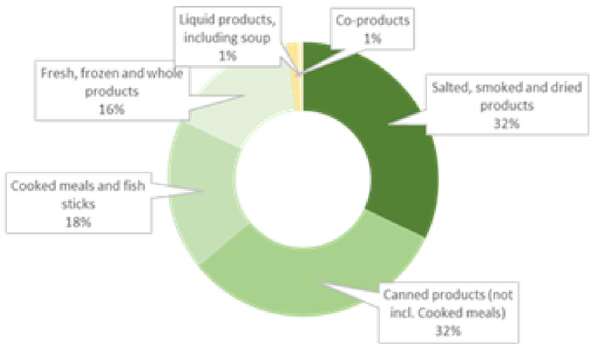


Figure 23. Distribution of fish and seafood processing sales by types of products (net sales). *Source: FranceAgriMer*

Traditionally, most **seabass** and **seabream** products by far have been sold as whole and fresh, in both modern and traditional retail channels, as well as the Ho-Re-Ca sector. It is estimated that around 5% is processed; however, there has been a growing trend for simpler processed seabass and seabream products, such as fillets and fresh delicatessen in the niche of premium and artisanal products, and packaged fillets in the standard retail segment. This trend is expected to strengthen in upcoming years, as described in Chapter 4.2 “French consumers and their consumption patterns”.

[5] “The fisheries and aquaculture sector in France”, April 2019, FranceAgriMer

4 France – Market insight

4.1 National retail sector

Development of the retail sector

France is the **third largest economy** in Europe with a 14.9% total share of the European Union's Gross Domestic Product (GDP)[6]. Germany, the UK, and France generated more than half of the EU's GDP, which amounted to EUR 15 300 billion at current prices in 2017. The euro area accounted for 72.9% of the EU's GDP, and the 19 Member States, which form the euro area, had a combined GDP of nearly EUR 11 200 billion in 2017. Germany (29.2%) and France (20.5%) together contributed half of the euro area GDP; Italy (15.4%) and Spain (10.4%) made up a quarter.

Although the key economic drivers of the retail sector, such as labour productivity, job growth, consumer purchasing power, and market demand, showed mixed trends in recent years, in 2015 and 2016 France demonstrated signs of long-awaited **economic recovery** after two years of recession. General economic trends throughout France suggested cause for optimism, and national private consumption expenditure accelerated to 1.3% in the second quarter of 2019, approaching the EU average of 1.4% in the same period (Figure 24).

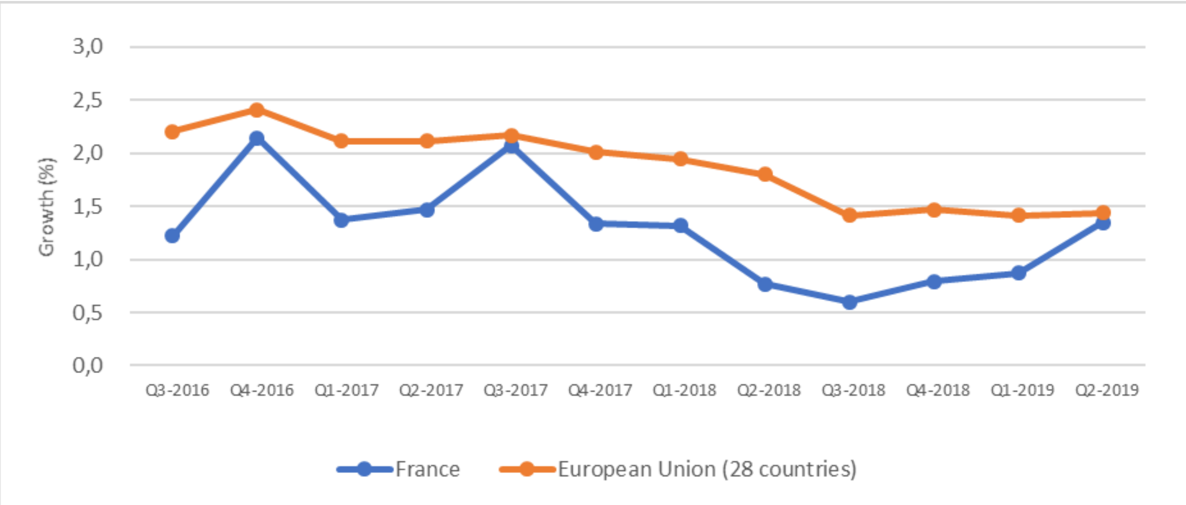
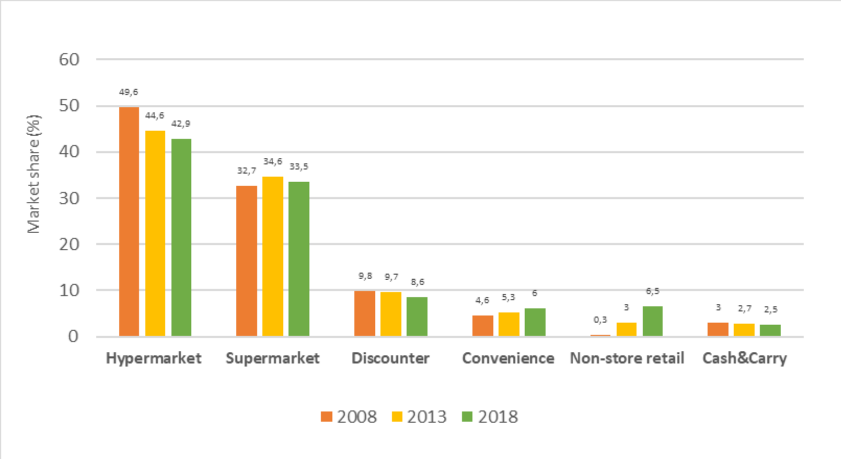


Figure 24. Development of the private final consumption expenditure; constant prices. *Source: OECS database*

France's food retail market **is one of the strongest in the world**, supporting best-practice development among a wide range of retailers and allowing the most successful retailers to expand and lead retail in other markets around the globe[7].

6 "Share of Member States in EU GDP", Eurostat, 2019 https://ec.europa.eu/eurostat/web/products-eurostat-news/-/DDN-20180511-1?inheritRedirect=true

7 "France – food retail market report", by Kantar Retail



The key tendencies in the French food retail market for the past decade are characterized by **strong competition**, **consolidation,** and **multi-dimensional expansion** combined with mixed strategies across market segments, channels, and market positioning.

Figure 25. Dynamics of the market shares of the main grocery sales channels. *Source: Kantar Retail*

In 2018, more than 42% of the grocery market share was composed of **hypermarkets** and more than 33% by **supermarkets,** which represent the dominant sales channels in the country. However, although the market share of hypermarkets decreased 13% in 2008–2018, the market share of supermarkets rose 2% in the same period. **Discounters** and **convenience** stores were being outpaced by **non-store** retail formats, which saw its market share rise from 0.3% in 2008 to 6.5% in 2018, as a consequence of expansion of several non-store formats, such as online sales, “click and collect” points, etc. (Figure 25).

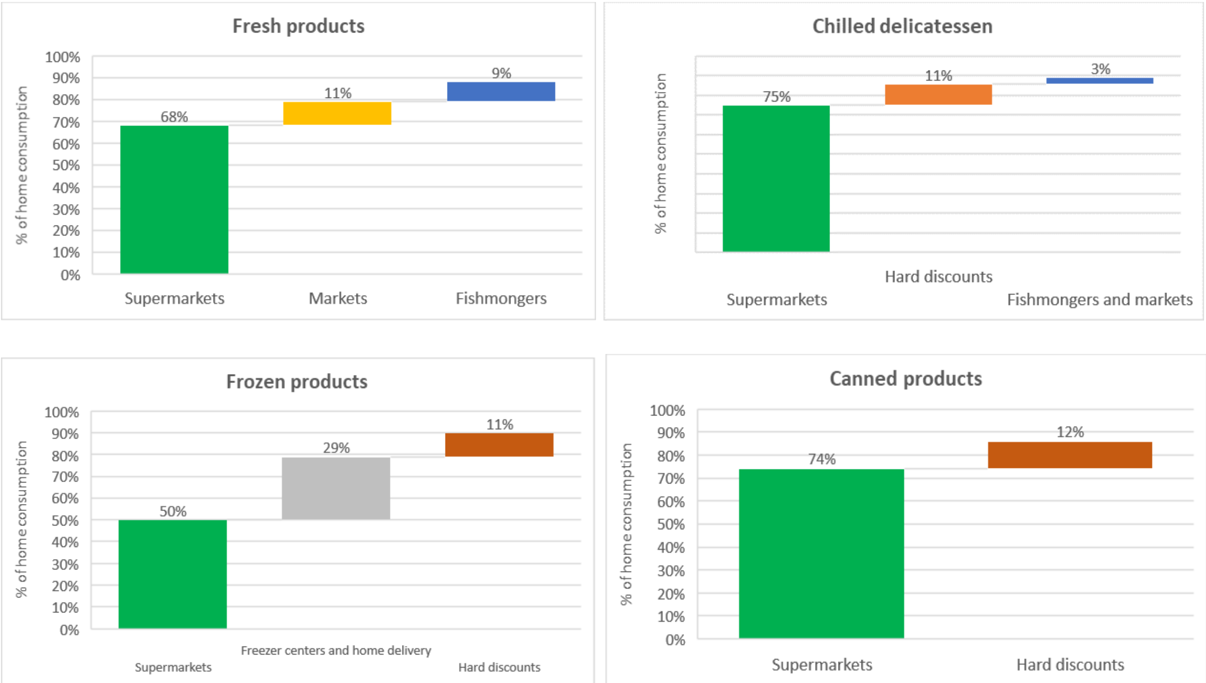
The French food retail landscape is considered highly concentrated with the top five grocery retail groups making up 75% of the market in 2018. Carrefour and Leclerc lead with 18.5% and 18.9% market shares, respectively, followed by Intermarche, Auchan, and System U. The key players are gradually taking over smaller retailers and expanding into traditional retail channels areas.

Table 11. Dynamics of the top ten grocery retail chains in France

	Sales (EUR million)			Grocery market share (%)		
	2008	**2013**	**2018**	**2008**	**2013**	**2018**
Carrefour	37 882	34 879	37 676	22,8	19,7	18,5
Leclerc	23 499	30 975	38 474	14,1	17,5	18,9
Intermarche	25 180	23 898	29 892	15,2	13,5	14,7
Auchan	21 012	22 168	24 954	12,6	12,5	12,2
Systeme U	13 224	18 223	22 684	8	10,3	11,1
Casino	19 169	17 914	19 641	11,5	10,1	9,6
Schwarz G.	6 323	7 534	8 384	3,8	4,3	4,1
Louis Delhaize	7 103	6 706	7 164	4,3	3,8	3,5
Metro Group	3 947	4 112	4 842	2,4	2,3	2,4
Aldi Nord	2 861	3 240	3 598	1,7	1,8	1,8
Other	5 921	7 080	6 465	3,6	4	3,2
Total	**166 121**	**176 730**	**203 773**	**100**	**100**	**100**

Source: Kantar

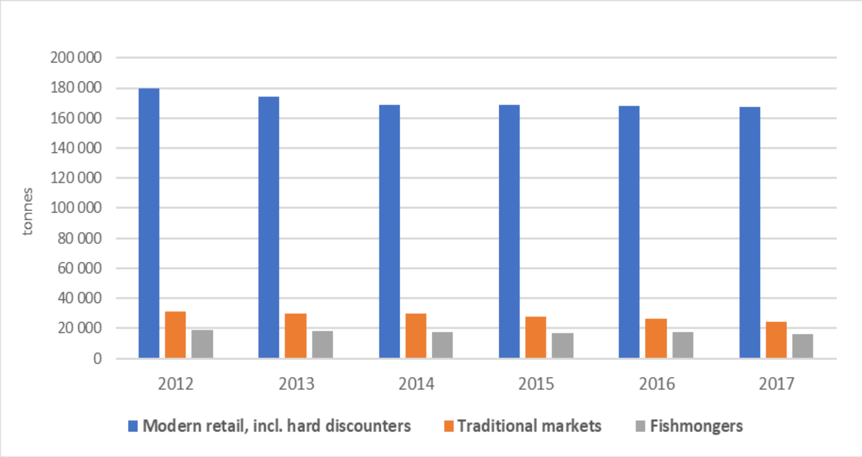
Supermarkets represent the major sales channels for the sale of fish and seafood products, compared with other retail sales channels in France. According to the research data of FranceAgriMer on the consumption of aquatic products by presentation forms for home consumption in 2018[8], 68% of fresh fish and seafood for home consumption was purchased in supermarkets, whereas 20% of fresh fish and seafood was purchased in traditional sales channels (11% at markets and 9% in fishmongers). The share of supermarkets in the household purchases of chilled delicatessen fish and seafood, frozen and canned fish, and seafood products also remained larger than other sales channels (Figures 26–29).



Figures 26–29. Shares of various retail sales channels in purchases of fish and seafood products for home consumption in France in 2018. *Source: FranceAgriMer/Kantar*

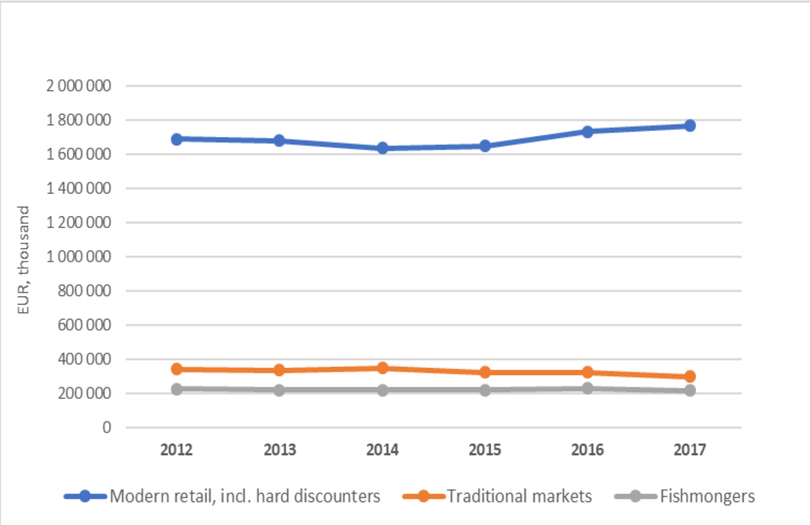
For product volume, some 167 200 tonnes of fresh fish and seafood were purchased in modern retail sales channels, including hard discounters in 2017. In the same year, nearly 24 470 tonnes of fresh fish and seafood were bought at traditional markets, and 15 855 tonnes of fresh fish and seafood were purchased from fishmongers.

[8] "The fisheries and aquaculture sector in France", April 2019, FranceAgriMer



In 2012–2017, the dynamics of fresh fish and seafood purchases in **volume** showed a downward trend in all of the main sales channels: supermarkets (−7%), traditional markets (−22%), and fishmongers (−17%; Figure 30).

Figure 30. Distribution of fresh fish and seafood products by sales channels in France. *Source: FranceAgriMer*



The dynamics of the **value** of fresh fish and seafood purchases reflected tendencies in volume (Figure 31). The value of fresh fish and seafood purchases in supermarkets reached EUR 1.77 billion (+4.5% over 2012), EUR 299 million in traditional markets (−12% compared with 2012) and EUR 215 million (−5% compared with

Figure 31. Dynamics of value distribution of fresh fish and seafood products by sales channels. *Source: FranceAgriMer*

The **average annual prices** of fresh fish and seafood products followed a similar upward tendency in all sales channels (Figure 32). Selling large volumes and offering a higher level of commoditisation of products, supermarkets offer prices for fresh fish and seafood far lower than traditional sales channels, which focus more on customisation of assortment and individualised approaches. Although the average annual prices of fresh fish and seafood in **supermarkets** evolved from EUR 9.4 to 10.6 per kg in 2012–2017, the average annual prices of fresh fish and seafood in **traditional markets** went up from EUR 10.9 to 12.2 per kg in the same period. The highest average annual price of fresh fish and seafood was observed in **fishmongers**, which rose from EUR 11.8 to 13.6 per kg in the same period.

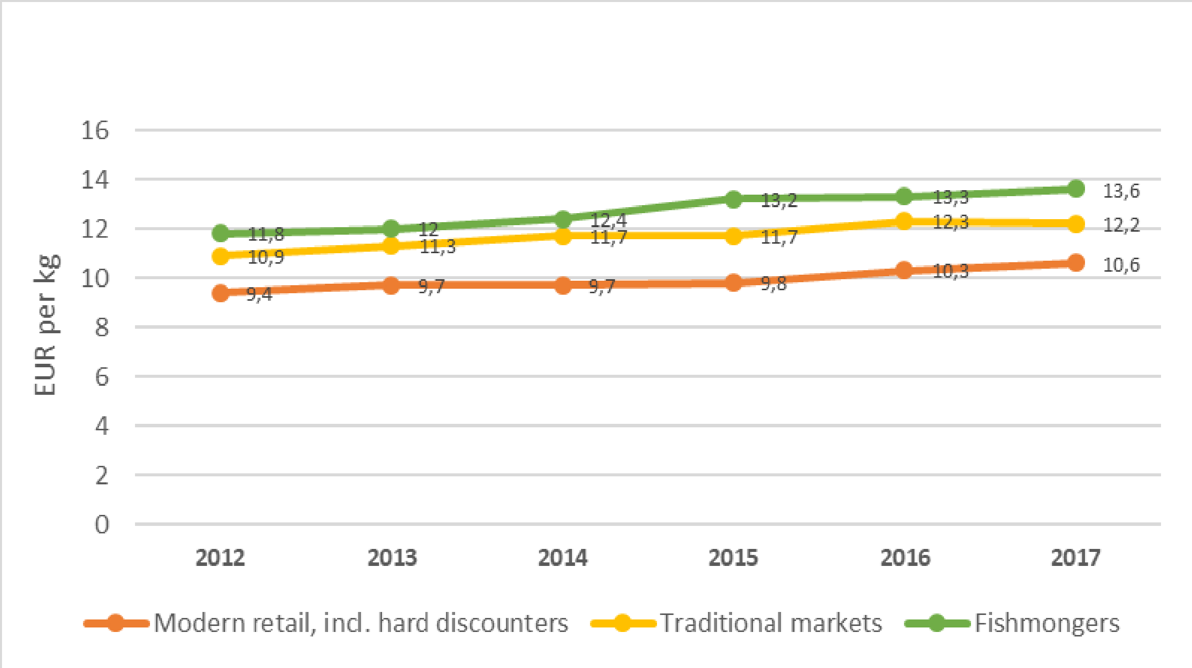


Figure 32. Dynamics of average prices pf fresh fish and seafood products by sales channel. *Source: FranceAgriMer*

4.1.1 Availability of seabass and seabream in the retail

It is estimated that approximately 49% of seabass and 46% of seabream are purchased though the retail sector, whereas 51% of seabass and 54% of seabream are consumed in the Ho-Re-Ca sector. By summarising the types of seabass and seabream products sold through various retail channels on the market in France, those species can be categorised in the following groups:

- Fresh and chilled seabass and seabream (approximately 90%)
- Fresh seabass and seabream fillets (approximately 9%)
- Ready-to-cook and ready-to-eat seabass and seabream products (less than 1%).

The description below provides a summary of the assortment of seabass and seabream products in several retail channels, including both traditional and modern retail, observed in April 2019. This description aims to provide an insight and an illustration of typical product forms for a better understanding of product availability, types, forms, and prices, and includes examples from random stores of different formats. Even if **traditional markets** do not lead the sales of seabass and seabream in volume, those places remain among the favourites of French consumers seeking a special diversity of products, artisanal production, freshness, and quality. Sale of fish and seafood at traditional markets is typically represented by several individual fish fishmongers converging in one covered market, but using different locations in the market.

In one of the oldest markets in Paris, Marche Saint Quentin, seabass and seabream were offered by several fishmongers providing a large diversity of product forms. Whole fresh seabass and seabream were the most usual product types, supplemented by seabass and seabream fillets and ready-to-cook seabass and seabream products. It is estimated that all observed seabass and seabream species were of French origin. The assortment included both farmed and wild species; however, the method of production was often not clear.

Photo 4. A fresh-fish counter at the Marche Saint Quentin in Paris. *Source: Eurofish*

The prices of whole fresh seabass and seabream ranged from EUR 19.80 to 21.99 per kg (the estimated size of the observed species is 400–600 g). The prices of fresh seabass and seabream fillets were EUR 39.90 per kg, whereas the prices of ready-to-cook seabass and seabream were EUR 9.80 per fish (estimated weight 400–600 g; Table 12).

Table 12. Overview of seabass and seabream assortment at the Saint Quentin market in Paris

Latin name	Species	Production method	Product form	Presentation	Price (EUR/kg)	Remark
Dicentrarchus labrax	European seabass	n/a	fillet	Fresh	39.90	n/a (est. France)
Sparus Aurata	Gilthead seabream	n/a	fillet	Fresh	39.90	n/a (est. France)
Dicentrarchus labrax	European seabass	n/a	whole	Fresh	21.99	n/a (est. France)
Dicentrarchus labrax	European seabass	wild	whole	Fresh	19.00	France
Sparus Aurata	Gilthead seabream	n/a	whole	Fresh	19.00	n/a (est. France)
Dicentrarchus labrax	European seabass	farmed	whole	Fresh	19.80	BIO (Greece)
Sparus Aurata	Gilthead	farmed	whole	Fresh	19.80	BIO

	seabream					(Greece)
Dicentrarchus labrax	European seabass	n/a	ready-to-cook	Fresh	9.80 per 1 piece	n/a
Sparus Aurata	Gilthead seabream	n/a	ready-to-cook	Fresh	9.80 per 1 piece	n/a

Photo 5 (left) and 6 (right). Whole seabass and seabream at the Marche Saint Quentin in Paris. *Source: Eurofish*

Photo 7. Traditional fishmonger at the Marche Saint Quentin in Paris. *Source: Eurofish*

Some of the fishmongers at the market offered biologically farmed seabass and seabream with a private label, “AB–Agriculture Biologique”. Descriptive information about the organic farming of seabass and seabream from Golf de Corinthe was provided in illustrated materials highlighting a combination of best environmental practices, respect for biodiversity, the preservation of natural resources, and the assurance of a high level of animal welfare. The geographical denomination of the place origin was also marked on the product label.

Photo 8 (left) and 9 (right). Biological seabass and seabream at the Marche Saint Quentin in Paris. *Source: Eurofish*

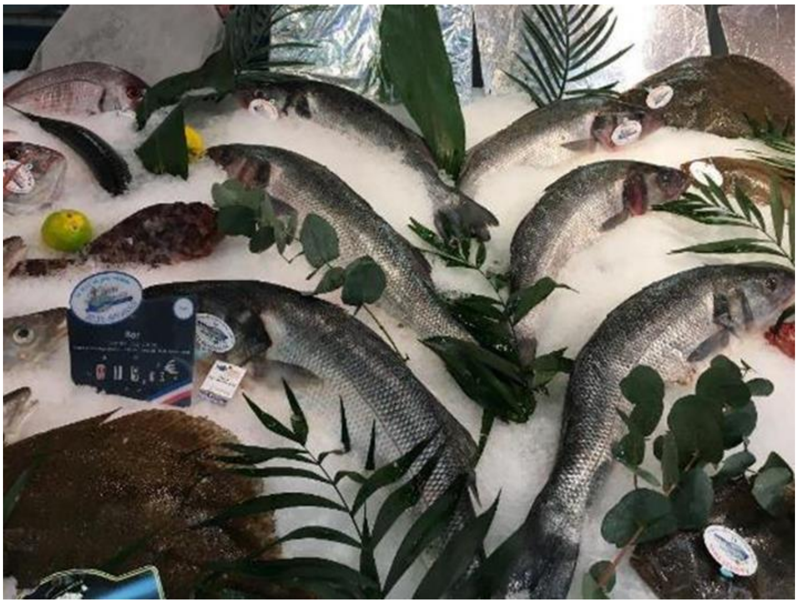


Photo 10. Wild seabass from artisanal French fisheries at the Marche Saint Quentin in Paris. *Source: Eurofish*

A selection of large seabass (600–800 g and 800–1 000 g.) from wild fisheries was offered among the fresh fish assortment in the traditional market.

Seabass is caught by the French artisanal fisheries in the Golf de Gascogne, indicating the production method and the place of origin on the product information label.

An interesting selection of **ready-to-cook** seabass and seabream products was offered to time-conscious consumers in the form of fresh seabass and seabream fillets.

The fillets were stuffed with fresh tomato slices and fresh basil, wrapped in a thin thread, and served ready to be baked in the oven.

Photo 11. Fish counter with ready-to-cook seabass at the Marche Saint Quentin in Paris. *Source: Eurofish*

An assortment of seabass and seabream products observed at several individual fishmongers in various parts of the city demonstrated a dominance of wild seabass and seabream over farmed species. The selection of wild species was from artisanal French fisheries offering premium quality and assortment. The price level for wild seabass topped EUR 58.00–59.00 per kg for whole fresh seabass and up to EUR 128.00 for fresh wild seabream fillet.

Photo 12. Fresh whole farmed seabream at a traditional fishmonger in Paris. *Source: Eurofish*

A minor share of seabass and seabream observed in the traditional fishmongers was represented by farmed products.

A selection of fresh whole seabream from biological aquaculture (AB–Agriculture Biologique, Golf de Corinthe, origin Greece) were priced at EUR 12 per piece (estimated size 400–600 g).

Table 13. Overview of seabass and seabream assortment at several fishmongers in Paris

Latin name	Species	Production method	Product form	Presentation	Price (EUR/kg)	Remark
Dicentrarchus labrax	European seabass	wild	fillet	Fresh	60.00	North-East Atlantic
Sparus Aurata	Gilthead seabream	wild	fillet	Fresh	50.00	North-East Atlantic
Dicentrarchus labrax	European seabass	wild	whole	Fresh	39.95	Est. France
Sparus Aurata	Gilthead seabream	n/a	whole	Fresh	34.00	Estimated as wild, North-East Atlantic
Dicentrarchus labrax	European seabass	wild	whole	Fresh	58.00–68.00	France, "Peche par le Kers Atao"
Sparus Aurata	Gilthead seabream	wild	fillet	Fresh	128.00	France
Sparus Aurata	Gilthead seabream	farmed	whole	Fresh	12.00 per 1 piece	BIO, Greece

Photo 13 (left) and 14 (right). Fresh whole seabass and seabream and seabream fillet at a traditional fishmonger in Paris. *Source: Eurofish*

Photo 15 (left) and 16 (right). Fresh whole seabream from wild fisheries North-East Atlantic at a traditional fishmonger in Paris. *Source: Eurofish*

Photo 17. A fresh-fish and seafood counter at a traditional fishmonger in Paris. *Source: Eurofish*

Photo 18 (left) and 19 (right). Premium wild fresh seabream fillet and wild whole seabass at a traditional fishmonger in Paris, French origin. *Source: Eurofish*

Nearly all the volume of seabass and seabream products offered at the observed traditional markets and fishmongers are of French origin owing to the focus of traditional sales channels on the excellence of domestic production. As in the traditional sales channels, most of the seabass and seabream assortment observed in the modern retail channels was farmed and wild seabass and seabream from France. Large farmed seabass and seabass and seabream from biological aquaculture in Greece were among the assortment in hyper- and supermarkets.

Table 14. Overview of seabass and seabream assortment at several fishmongers in Paris

Latin name	Species	Production method	Product form	Presentation	Price (EUR/kg)	Remark
Dicentrarchus labrax	European seabass	n/a	fillet	Fresh	41.90	Est. France
Dicentrarchus labrax	European seabass	farmed	whole	Fresh	29.90	Greece, 800–1 000 g
Sparus Aurata	Gilthead seabream	farmed	whole	Fresh	29.90	Greece
Dicentrarchus labrax	European seabass	farmed	whole	Fresh	19.90	France
Sparus Aurata	Gilthead seabream	farmed	whole	Fresh	24.80	France
Dicentrarchus labrax	European seabass	wild	whole	Fresh	45.90	France, North-East Atlantic
Dicentrarchus labrax	European seabass	n/a	whole	Fresh, MAP	EUR 6.26 per fish	BIO
Sparus Aurata	Gilthead seabream	n/a	whole	Fresh, MAP	EUR 7.22 per fish	BIO


Photo 20 (left) and 21 (right). Large farmed seabass and BIO seabass and seabream farmed in Greece. *Source: Eurofish*

Photo 22. Fresh-fish counter in a hypermarket. *Source: Eurofish*

The excellence of fresh fish and seafood assortment at the market is an indispensable part of forming the preference and demand for fresh fish and seafood by French consumers.

Fresh products are the most sold category of fish and seafood, followed by chilled delicatessen, frozen, and canned products in the share of household spending on fish and seafood in France.

It should be noted that **no frozen seabass and seabream** products have been observed in the stores visited in the traditional or modern retail sales channels.

A "Picard store", which specializes only in selling frozen food products, had a wide range of frozen fish and seafood; however, no seabass and seabream products were found in that store, either domestic or imported.

Photo 23. Frozen fish counters in a "Picard store" in Paris. *Source: Eurofish*

Photo 24. “French Pavilion” at the fresh fish counter in Monoprix hypermarket in Paris. *Source: Eurofish*

The assortment of seabass and seabream products in the retail sector is dominated by domestically produced species. Historically, French consumers prefer **“made in France”** food products, and wide research reveals that most French consumers declare that they favour “made in France products” when buying food products. Reflections of the seabass and seabream assortment in the modern retail stores highlight a focus on domestically produced seabass and seabream and seabass and seabream from biological aquaculture production. At the “French Pavilion” at the fresh fish and seafood counter in one of the national hypermarkets, wild seabass was priced at EUR 45.90 per kg, and biological farmed seabass was offered at EUR 19.90 per kg, both caught and produced in France. Biological farmed seabream was offered at EUR 24.00 per kg, farmed in France.

Photo 25 (left) and 26 (right). Fresh farmed seabream and wild seabass at the French pavilion. *Source: Eurofish*

Fresh wild seabass sold in the French Pavilion at the fresh fish and seafood counter was marked with an information label "Wild capture, North-East Atlantic capture zone".

Another wild seabream species, like Grey Seabream *(Daurade Grise or Spondyliosoma cantharus)*, was also offered among the assortment.

Photo 27. Fresh seabass and seabream in MAP. *Source: SFAMN*

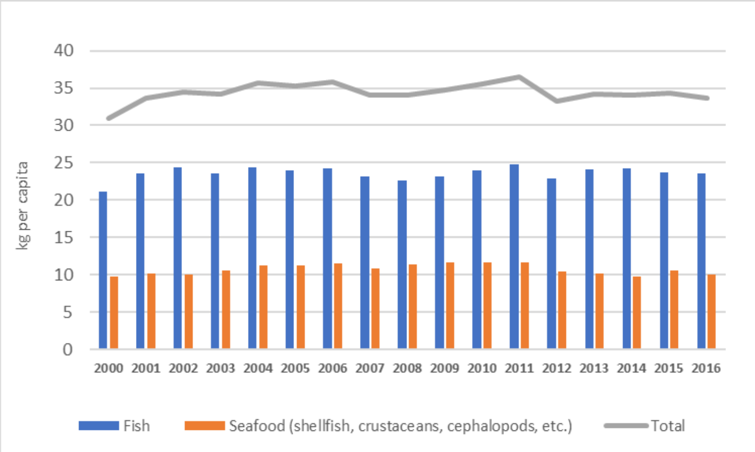
Photo 28 (left) and 29 (right). Fresh seabass and seabream in MAP. *Source: SFAMN*

Photo 30. Fresh seabass and seabream in MAP. *Source: SFAMN*

Although fresh whole seabass and seabream sold at fresh-fish counters served by sellers constitute the main share of the volume sold, an increasing trend for packaged seabass and seabream has been observed in the modern retail stores. Both whole (gutted) fish as well as fillets are sold in modified atmosphere packaging (MAP) and sold in self-service departments of the

4.2 French consumers and their fish consumption pattern

French consumers are the most important source of influence on leading domestic retail chains, which are also inspired by global retail trends, making the grocery retail sector in France a unique blend of local and international. In 2017, the national **consumption of fishery and aquaculture products**, including out-of-home consumption, was 32.9 kg per capita in live weight equivalent, according to the latest data from EUMOFA[9]. These figures are comparable with the national sources of data on fish and seafood consumption in France, which indicated 33.6 kg per capita in 2016 and estimated provisional data of 34 kg per capita in 2017[10] (Figure 33).



Structure of fish and seafood consumption:

- 58% - fish from capture fisheries;
- 11% - farmed fish;
- 10% - shellfish, crustaceans, and cephalopods from capture fisheries;
- 21% - farmed shellfish, crustaceans, and cephalopods from capture fisheries.

Figure 33. Dynamics of per capita consumption of fish and seafood in France. *Source: FranceAgriMer*

In 2000–2016, the national consumption of **fish products** increased from 21.1 to 23.6 kg per capita, according to data from FranceAgriMer. Consumption of **seafood products** also grew from 9.8 to 10 kg per capita. In total, consumption of **fish and seafood products** strengthened from 30.9 to 33.6 kg per capita in 2000–2016.

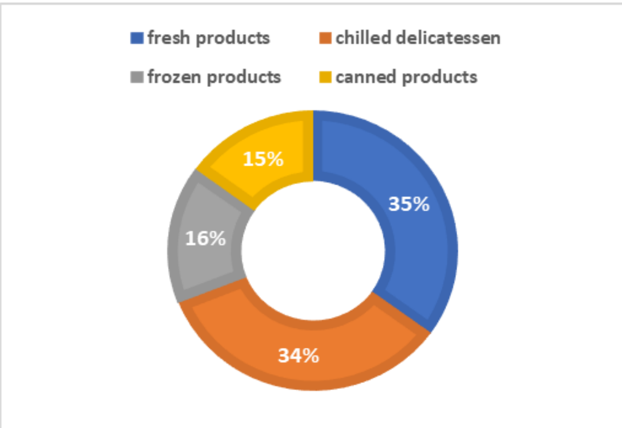


Figure 34. Households spending on fish and seafood products in 2018. *Source: FranceAgriMer/Kantar World Panel*

Total **consumer spending** on fish and seafood products reached EUR 7.4 billion in 2018. More than two-thirds of the expenditures were for the two main categories: **fresh** fish and seafood (35%) and **chilled delicatessen** fish and seafood (34%). Spending on **frozen** fish and seafood constituted 16% of the total expenditure, and spending on **canned** fish and seafood products made up 15% (Figure 34).

[9] "The EU Fish Market 2018", EUMOFA, European Commission, https://ec.europa.eu/fisheries/press/eu-fish-market-2018-edition-out_de

[10] "Consommation des produits de la pêche et de l'aquaculture 2017", September 2018, by FranceAgriMer

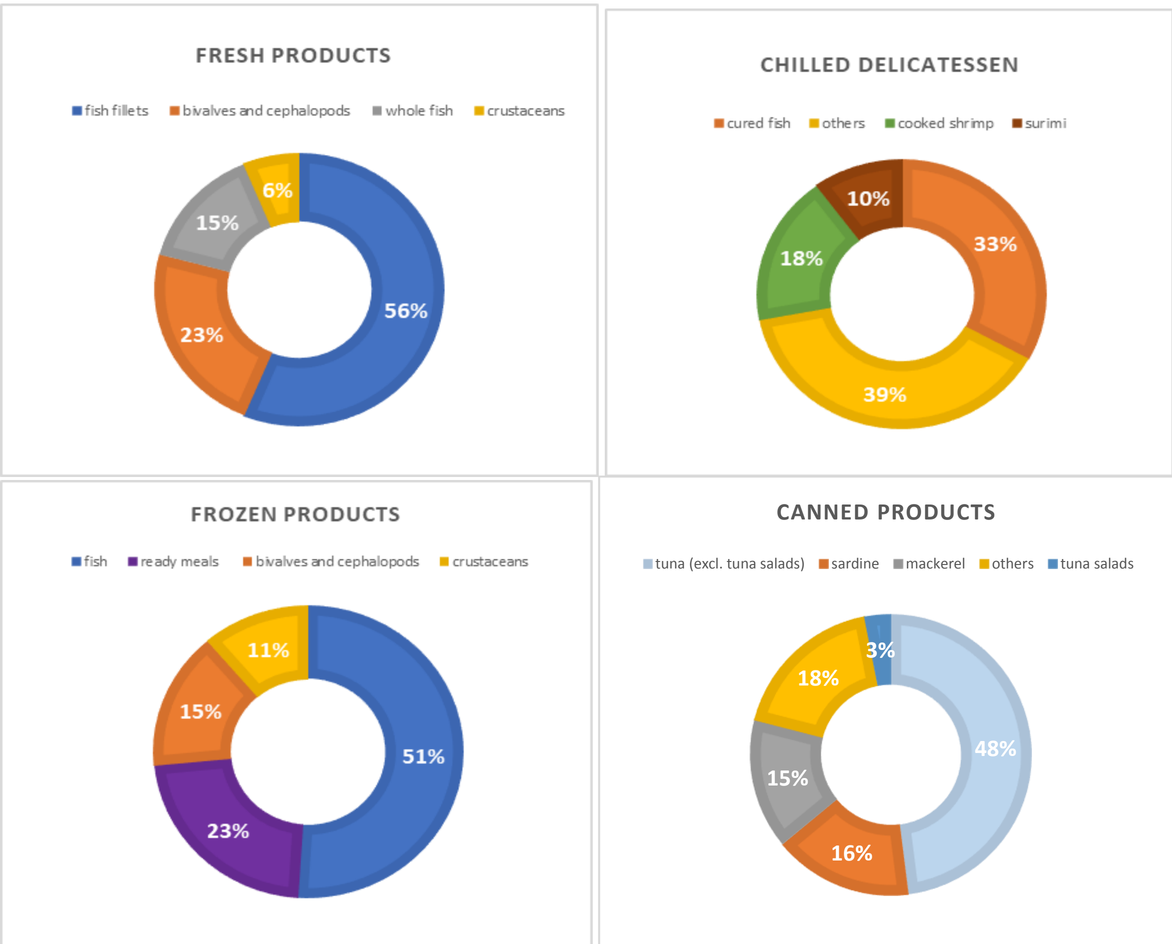
In 2018, household spending on **fresh fish and seafood products** in France reached nearly EUR 2.77 billion for 239 908 tonnes. Compared with 2009, the volume of fresh fish purchases declined 7%, whereas the value increased 18% (Table 15).

Table 15. Development of purchases of fish and seafood products by French households in 2009–2018

	2009		2018		Evolution	
	Total quantities (1 000 tonnes)	Total spending (EUR 1000)	Total quantities (1 000 tonnes)	Total spending (EUR 1000)	Volume	Value
Fresh products	259 158	2 339 637	239 908	2 766 399	-7%	18%
Frozen products	149 560	1 369 744	118 406	1 269 548	-21%	-7%
Canned products	109 816	915 354	124 912	1 136 821	14%	24%
Chilled delicatessen	162 066	1 878 324	186 970	2 675 224	15%	42%

Source: FranceAgriMer

The breakdown of expenditures by presentation and species groups revealed that, in the category of fresh fish and seafood products, **fish fillets** accounted for 56%, bivalves and cephalopods for 23%, whole fish for 15%, and crustaceans for 6% of the expenditures in that group in 2018 (Figures 35–38).



Figures 35–38. Breakdown of expenditures by product presentation and species groups in 2018. *Source: FranceAgriMer*

In analysing the **volume of seabass** and **seabream** in household consumption, it should be noted that 3 605 tonnes of seabass and 5 264 tonnes of seabream were bought in 2017. The **value** of the seabass and seabream purchases was EUR 52.4 million and EUR 61.8 million, respectively (Table 16). The **average price per kg** was EUR 14.5 for seabass and EUR 11.7 for seabream. With an average purchase weight of 0.6 kg for seabass and 0.7 kg for seabream, the expense per purchase of seabass was EUR 9.2 and EUR 7.8 per purchase of seabream.

Table 16. Summary of household consumption of seabass and seabream in France in 2017

	Total purchases (tonnes)	Total value (EUR, thousand)	Average price (EUR per kg)	Penetration rate	Volume of purchase (kg)	Expense per purchase
Seabass	3 605	52 391	14.5	10.8	0.6	9.2
Seabream	5 264	61 809	11.7	13.1	0.7	7.8

Source: FranceAgriMer

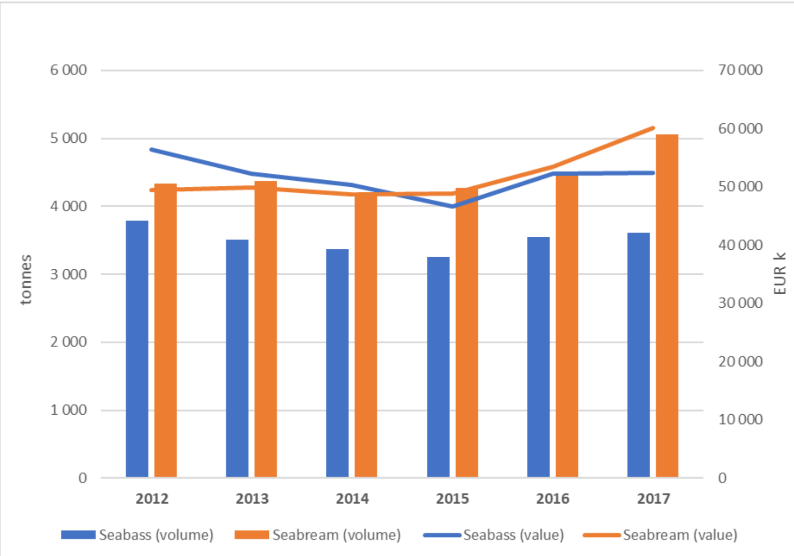


Figure 39. Evolution of seabass and seabream purchases in the households in France. *Source: FranceAgriMer*

In 2012–2017, the **volume** of **seabass** purchases followed a downward tendency, declining 5%, whereas the volume of **seabream** purchases increased 17%.

In the same period, the **value** of **seabass** purchases went down 7%, whereas the value of **seabream** purchases grew 22% (Figure 39).

The evolution of the average annual price for **seabass** paid by households in France declined from EUR 14.9 to EUR 14.5 in 2012–2017.

In contrast, the average annual price for **seabream** went up from EUR 11.4 to EUR 11.9 per kg in the same period (Figure 40).

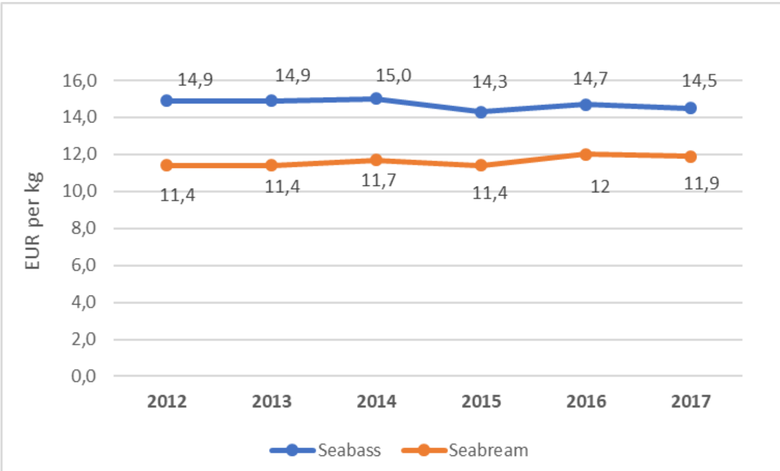
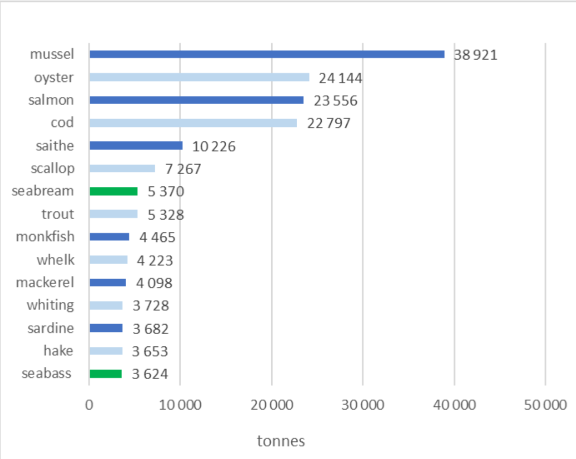


Figure 40. Evolution of prices per species in household purchases in France. *Source: FranceAgriMer*

Seabass and seabream have been established over time in French household consumption. Compared with other fresh fish and seafood species purchased by households for consumption at home, **seabream** is the seventh most purchased species in volume, after mussel, oyster, salmon, cod, saithe, and scallop. In value, seabream is the eighth most purchased species after salmon, cod, oyster, mussel, saithe, monkfish, and trout. Seabass is 15th most purchased fresh fish and seafood species in volume, and it is ninth in value (Figures 41–42). Regarding purchases of fresh fish without seafood, it can be observed that seabream is the fourth and seabass is 11th most purchased species in volume (Figures 41–42).



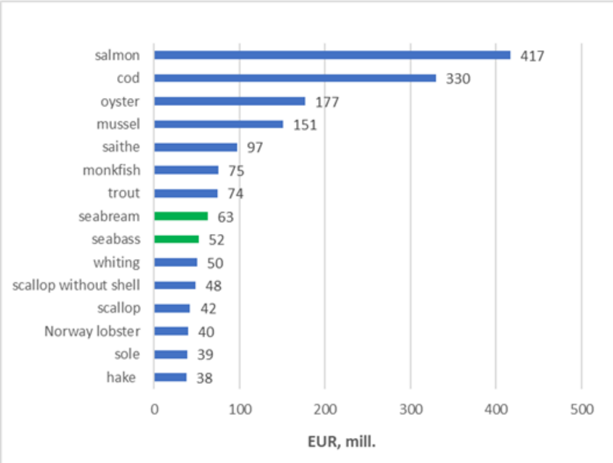


Figure 41 (left) and 42 (right). Main species purchased fresh in 2018 in France by volume and value. *Source: FranceAgriMer*

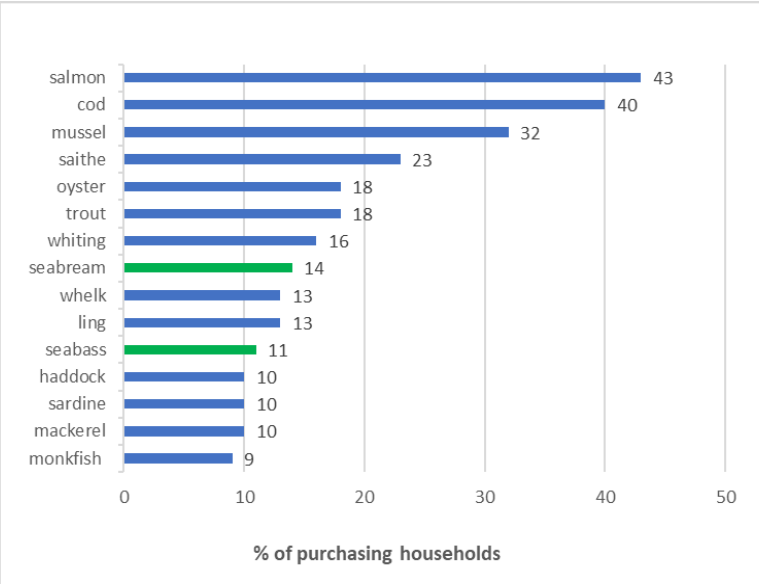


Figure 43. Percentage of purchasing households of the main species purchased fresh in 2018 in France. *Source: FranceAgriMer*

In 2018, **seabass** was purchased by 11% of households and **seabream** by 14% of households.

Salmon (43%), cod (40%), and mussel (32%) had the highest penetration rates in the purchases by French households. Other species with high penetration rates were saithe (23%), oyster and trout (18%), and whiting (16%; Figure 43).

A distinctive trend in the retail segment is that **pre-packaged fish and seafood** continue to gain importance in the French market where fewer purchases are served by the seller, whereas the pre-packaged sales are at their highest level.

In 2018, the sales of **fresh fish served by sellers** amounted to 89 000 tonnes, the lowest level since 2012. In 2012–2018, sales of fresh fish served by seller went down 15%.

In contrast, the sales of **pre-packaged fresh fish** increased 18% in the same period, reaching 26 000 tonnes in

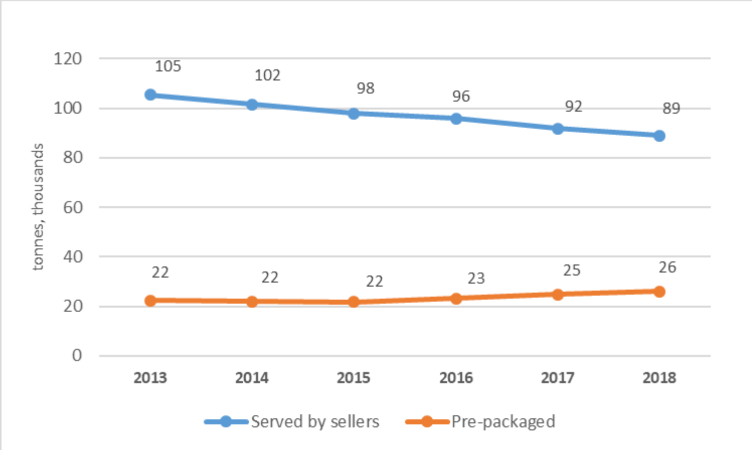


Figure 44. Sales volumes of fresh fish in France. *Source: Kantar Worldpanel*

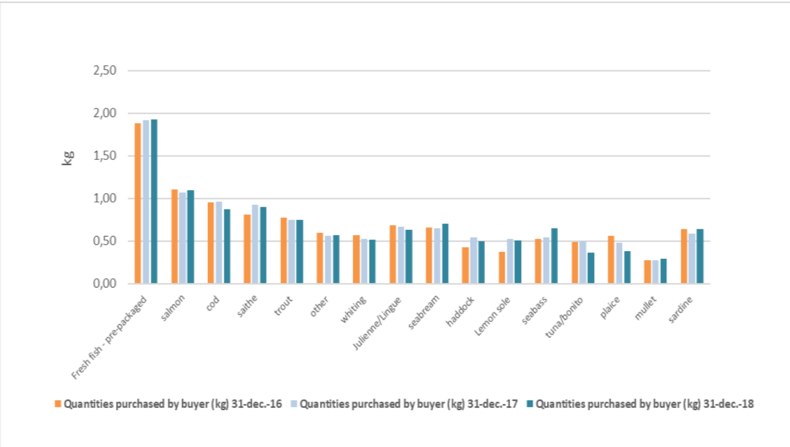


Figure 45. Quantities of fresh pre-packaged fish by species in the French households. *Source: Kantar Worldpanel*

The average quantities of fresh **pre-packaged seabass** purchased increased from 0.53 to 0.65 kg in 2016–2018.

The average volume of **pre-packaged seabream** went up from 0.66 to 0.7 kg (Figure 45).

Another interesting observation is that, in 2018, even if purchases of whole fish were considerably lower than cut fish, the sale of cut fish remained stable at 31 000 tonnes, compared with the previous year, whereas the sale of cut fresh fish declined 2 000 tonnes to 80 000 tonnes in 2018.

In 2016-2018, the sale of **whole seabass** decreased from 1.55 kg to 1.35 kg.

In contrast, the sale of **whole seabream** increased from 1.62 kg to 1.79 kg per buyer (Figure 46).

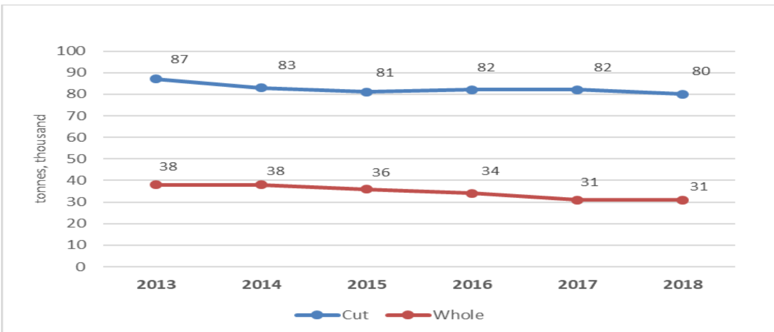


Figure 46. Dynamics of sales volumes of fresh fish as cut and whole.

Source: Kantar Worldpanel

4.3 Ho-Re-Ca sector

The history of **French gastronomy** goes back many centuries to the Gauls, who developed a culture of eating and drinking well. It strengthened its importance during the reign of King Louis XIV, and amplified table service in restaurants during the French Revolution. Since the 18th century, French chefs wished to bring out the best and most refined of their creations by combining best products and product variations for maximum taste harmony. At the beginning of the 20th century, French culinary schools continued to innovate by creating simpler and more natural dishes by refining the legacy of the past while using local products. The French ***"art de vivre"***, which is famous worldwide, is inseparable from the French gastronomy, making France the birthplace of the Michelin star, with a heritage of a wealth of delicious, fresh produce. The roots of France's food fame are in the country's climate, diversity of soils, abundant resources, and varied topography. Unsurprisingly, the French are recognised by themselves and others all over the world as the most enlightened of eaters and the great gourmets. The **restaurant** itself is a French creation, both linguistically and conceptually.

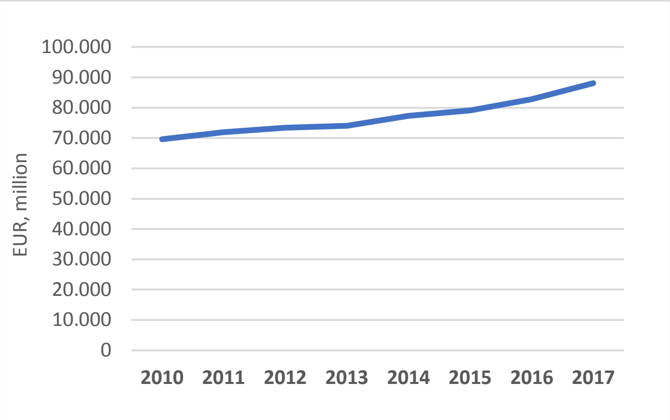


Figure 47. Dynamics of household consumption expenditure on restaurants and hotels in France. *Source: National statistics*

France has the **highest turnover for restaurants** and mobile-food services in the EU. In 2017, it reached approximately EUR 50.8 billion, overtaking the UK (EUR 46.7 billion) and Germany. The national dynamics of household consumption **expenditure on restaurants** and **hotels** in the country increased 26% in 2010–2017, reaching EUR 88.1 billion in 2017 (Figure 47).

France also retains the leading position in the number of restaurants in the EU, followed by Italy and Germany. According to the latest data available from the national statistics, the number of restaurants and mobile-food services reached 168 338 in 2016, an increase of 3 392 enterprises over the previous year (Table 17). In 2016, approximately EUR 47.8 billion was spent by national clients in the country's restaurants; EUR 4.4 billion was spent by foreign clients.

Table 17. Overview of the number of restaurants and mobile food services in France

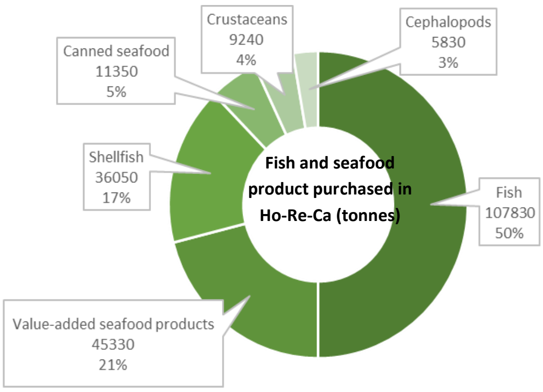
	2016	2015
Number of enterprises	168 338	164 945
Turnover excluding taxes (EUR million)	52 212.5	50 546.7
Full-time equivalent (FTE) workforce over the financial year	493 760	460 731
Value added excluding taxes (EUR, millions)	21 958.4	21 526.7

Source: National Institute of Statistics and Economic Studies

It is estimated that approximately 19% of fish and seafood in the country is consumed in the Ho-Re-Ca sector, whereas the major share of 81% is sold though the retail sector. Further, the split of fish and seafood consumption in the Ho-Re-Ca sector estimated that 16% was consumed in the restaurants and 3% was consumed in the institutional catering sector[11].

According to data from France AgriMer, purchases of fish and seafood products by the Ho-Re-Ca sector were estimated at 215 630 tonnes for a value of EUR 1.94 billion in 2017[12].

Natural fish, in the form of whole fish or fillets, fresh or frozen, represented 50% (107 830 tonnes) by volume and 54% by value (EUR 1 billion) of all fish and seafood-products purchased in the Ho-Re-Ca sector, followed by value-added seafood products, shellfish, crustaceans, cephalopods, and canned seafood (Figures 48 and 49).



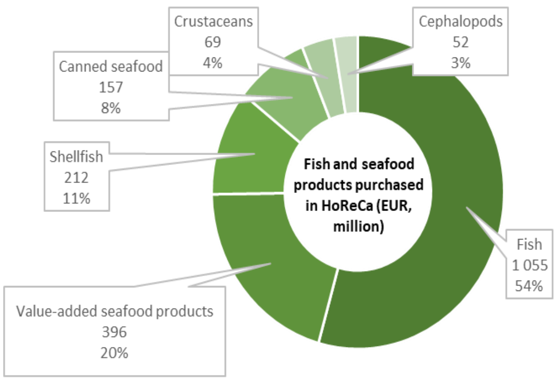


Figure 48 (left) and 49 (right). Shares of fish and seafood products purchased in the Ho-Re-Ca sector (tonnes and EUR, million). *Source: FranceAgriMer*

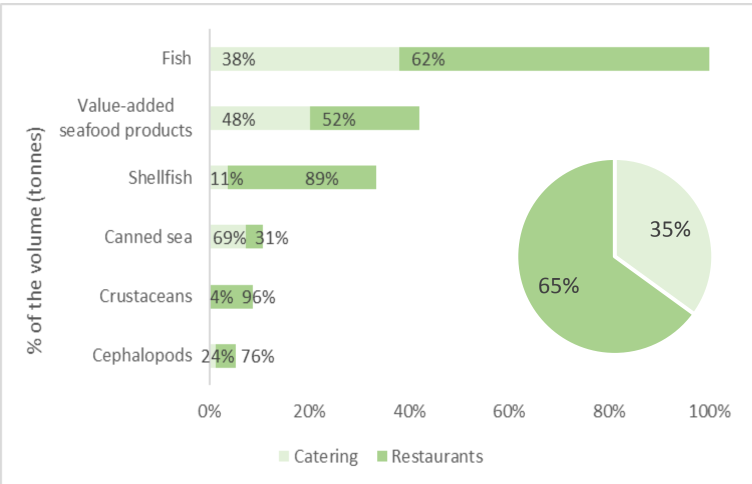


Figure 50. Shares of consumption of various fish and seafood products by collective and commercial restaurants in 2017. *Source: FranceAgriMer*

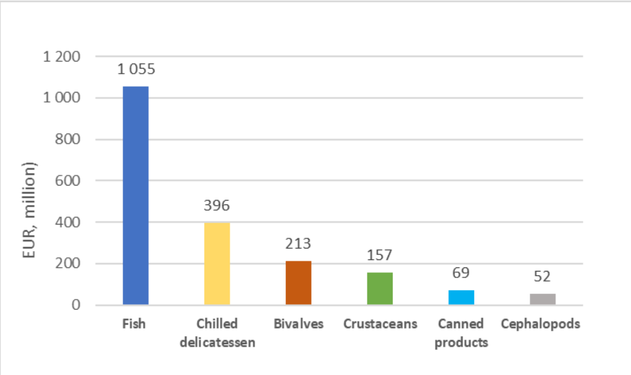
In terms of types of restaurants, 65% of all fish and seafood meals were consumed in commercial restaurants and other catering outlets, and 35% of fish and seafood meals were consumed in collective restaurants and catering outlets.

Approximately 62% of fish meals were consumed in commercial restaurants and catering, and 38% of fish meals were consumed in collective restaurants and catering (Figure 50).

[11] "The EU Fish market 2018", EUMOFA, European Commission

[12] "Etude sur les achats de produits aquatiques en restauration hors foyer", December 2018, www.franceagrimer.fr

The total spending for fish and seafood products in the Ho-Re-Ca sector totalled EUR 1.94 billion in 2017, where the value of fish products exceeded EUR 1 billion, followed by chilled delicatessen products, bivalves, crustaceans, canned products, and cephalopods. For catering types, the highest purchases of fish and seafood products were made in independent restaurants (EUR 1.2 billion; Figures 51 and 52).



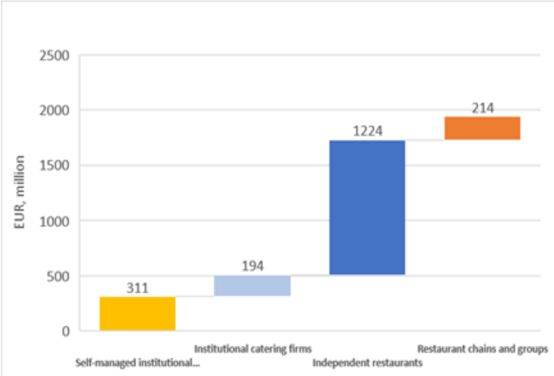


Figure 51 (left) and 52 (right). Total spending for types of fish and seafood and by catering outlet types in the Ho-Re-Ca sector in 2017. *Source: FranceAgriMer*

The largest share of purchases of fish products alone was made in independent restaurants (EUR 53 million), followed by self-managed institutional catering (EUR 22 million), independent catering firms (EUR 16 million), and restaurant chains and groups (EUR 9 million; Figure 53).

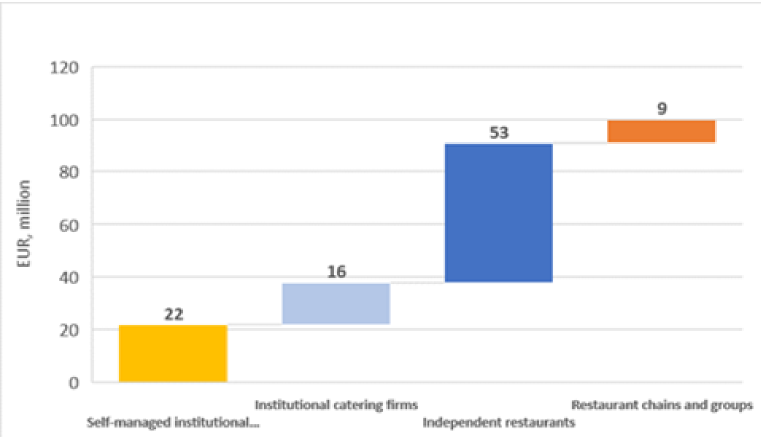
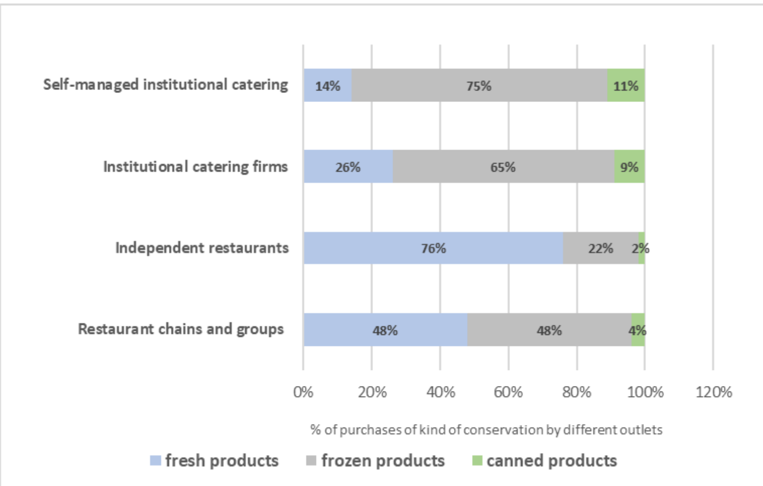


Figure 53. Spending for fish products by catering outlet type in 2017 (EUR, million). *Source: FranceAgriMer*



The breakdown of purchases of fish and seafood by product presentation showed that the largest share of fresh products was purchased in independent restaurants (76%), followed by restaurant chains and groups (48%), institutional catering firms (26%), and self-managed institutional catering (14%; Figure 54).

Figure 54. Breakdown of purchases by type of product conservation for different outlets (quantities) in 2017. *Source: FranceAgriMer*

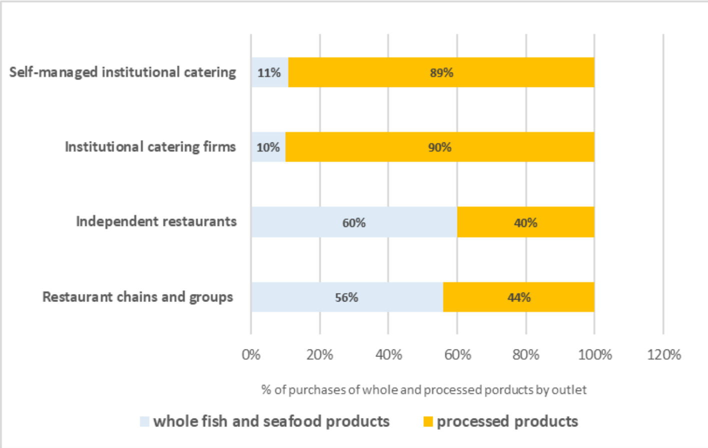


Figure 55. Breakdown of purchases of whole and processed fish and seafood by different outlets (quantities) in 2017. *Source: FranceAgriMer*

The breakdown of purchases by product forms revealed that the largest part of whole fish and seafood products was purchased in independent restaurants (60%) and restaurant chains and groups (56%), while the smallest share was purchased in self-managed institutional catering (11%) and institutional catering firms (10%; Figure 55).

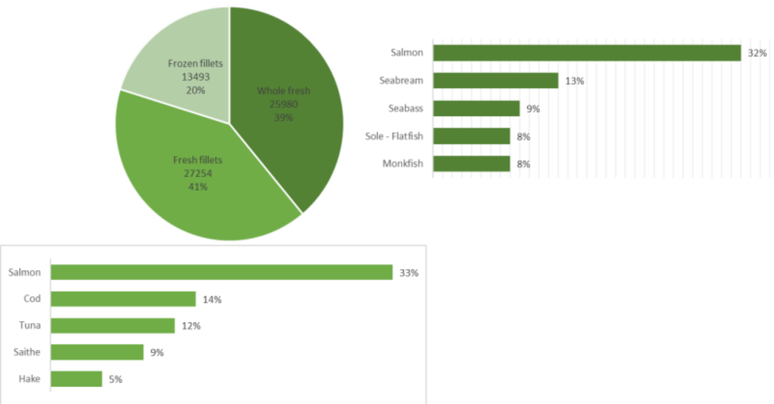


Figure 56. Fish consumption in restaurants and the top five species (tonnes and percentage). *Source: FranceAgriMer*

In terms of product forms for most popular fish species, seabass and seabream were the among the top three species after salmon in the category of whole fresh fish purchased in the Ho-Re-Ca sector. The share of salmon was 32%, and seabream and seabass had 13% and 9% in 2017 (Figure 56).

In 2017, fish purchases in the Ho-Re-Ca sector accounted for 107 840 tonnes, valued at EUR 1.055 billion. In terms of species, salmon was by far the most widely consumed (22.8% by volume), followed by cod (11.7%), Alaska pollock (8.7%), saithe (6.8%), hake (6.2%), **seabream** (5.6%), tuna (3.9%), sole/other flatfish (3.8%), and **seabass** (3.5%; Figure 57). The importance of other marine fish testifies to the desire of restaurateurs to offer slightly less conventional species on their menus.

The latest data from France AgriMer reveals that 6 030 tonnes of seabream and 3 810 tonnes of seabass were consumed in the Ho-Re-Ca sector in France in 2017. Out of 6 030 tonnes of **seabream products**, 85% was consumed in commercial restaurants and catering, and 15% was consumed in collective restaurants and catering. Out of 3 810 tonnes of seabass products, 89% was consumed in commercial restaurants and catering, and 11% was consumed in collective restaurants and catering.

A more detailed breakdown of data regarding types of commercial and collective restaurants and catering indicates that seabass and seabream are well represented in independent commercial restaurants.

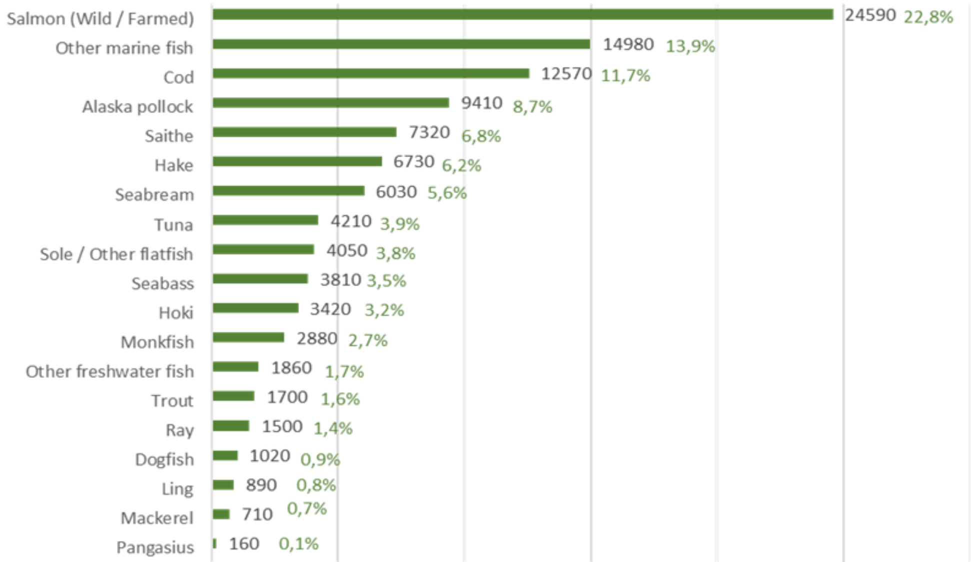


Figure 57. Fish consumption in the Ho-Re-Ca sector by species (tonnes and percentage share). *Source: FranceAgriMer*

Below are random examples of seabass and seabream servings on the menu of some restaurants in France, highlighting the use of those species in refined and innovative ways.


Photo 31 (left) and 32 (right). Seabass, celeriac pure, wild sorrel, and smoked sauce with shellfish and seabass fillet with seasonal herbs. *Sources: "Mirazur" restaurant and "Le Saint Martin" restaurant*


Photo 33 (left) and 34 (right). Seabream fillet, fresh cheese, roasted buckwheat seeds, and fresh garlic and carpaccio de daurade royale au citron caviar. *Sources: "Julien Binz" restaurant and "Helen" restaurant*

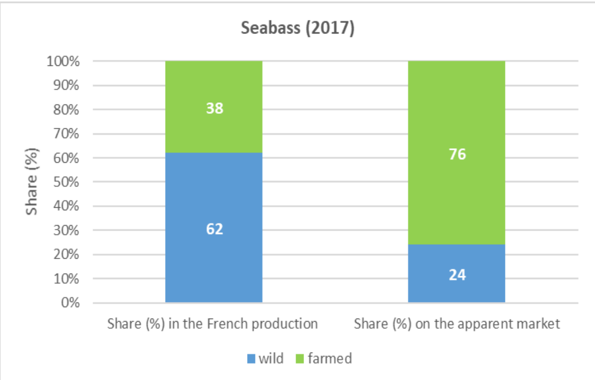
4.4 Market segmentation of seabass and seabream

Following the structure of seabass and seabream markets in Italy, Spain, and Greece, the general market segmentation of seabass and seabream in France is classified according to the production method, country of origin, quality attributes, and species size.

4.4.1 Segmentation of wild and farmed seabass and seabream

Seabass and seabream from capture fisheries occupy a **special niche** in the market, and they are generally considered superior to farmed species. Based on the analysis of data for seabass, wild seabass had a 62% share, whereas farmed seabass had a 38% share in the segment of French seabass production in 2017. In the segment of French seabream production, wild seabream had a 34% share, and farmed seabream had a 66% share in the same year.

Analysing the shares of wild and farmed seabass and seabream, not only in the French production but totally available on the French market, the respective imported volumes of farmed and wild species from other countries have to be added. It should noted that all volumes of seabass and seabream exported from Greece, Turkey, and the Netherlands are farmed species, and nearly all volumes of seabass and seabream from Italy, Spain, Croatia, and other countries are also farmed species, with an minor exception of wild species. Summarising projections of farmed seabass and seabream species from French production and imported volumes, it has been estimated that in 2017 approximately 75–78% of all seabass available on the market in France was farmed seabass, whereas the rest, 23–25%, was wild seabass. The market share of farmed seabream was projected at 92–94%, whereas the market share of wild seabream was estimated at 6–7% (Figures 58 and 59).



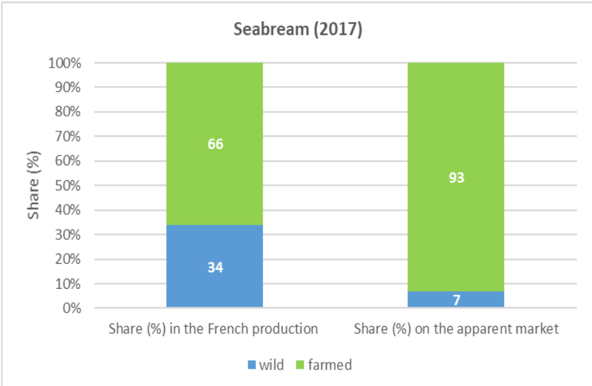


Figure 58 (left) and 59 (right). Shares of wild and farmed seabass and seabream in the French production of those species and total on the market. *Source: elaborations based on data from FAO, EUMOFA, SFAMN, and FEAP*

4.4.2 Segmentation by product attributes

Generally, the French market for seabass and seabream can be divided into two major segments, based on product attributes, such as species size, product quality, and product forms:

- Premium product segment,
- Standard product segment.

The **premium segment** typically includes larger seabass and seabream, artisanal capture species, products of organic production, and branded products. These are typically products of the utmost superior quality available in small quantities and addressed to a limited consumer demand. Seabass and seabream of this segment are usually available at specific fishmongers, high-end restaurants, and sometimes premium retail chains focusing on best selection of fresh fish and seafood. This segment includes fresh whole seabass and seabream, as well as fresh fillets produced in France, and species of premium quality produced in Greece, Italy, Spain, and other countries. The size of the premium product segment for seabass and seabream in France is considered the largest, compared with premium segments in other countries.

The **standard product segment** is formed mostly by seabass and seabream of standard high quality available in the Ho-Re-Ca and retail sectors. These products are usually available in bulk and sold at regular prices. These products include regular-sized fish, whole fish, and non-branded products. Freshness, healthy attributes of the products, quality, and convenience of the stores are considered the key drivers of the consumers' choice. Sometimes, fish of regular portion sizes are sold at discount retail stores and supplied to standard Ho-Re-Ca channels. The size of the mass-market quality segment on the French market is relatively is less than in other markets because of the structure of market supply and demand.

4.4.3 Segmentation by country of origin

Market segmentation of seabass and seabream by the countries of the species' origin and their respective shares on the French market are provided below (Tables 18–19 and Figures 60–61).

Table 18. Market shares of countries of origin of seabass (2017)

	Supply volume, tonnes	**Export volume, tonnes[13]**	**Market volume, tonnes**	**Market share (%)**
Production - French origin (wild and farmed)	4 658	1 037	3 621	36
Import - Greece	*3 130*	0	*3 130*	31
Import - Netherlands	*965*	0	*965*	10
Import - Spain	*860*	0	*860*	9
Import - Italy	*543*	0	*543*	5
Import - Turkey	*428*	0	*428*	4
Import - other countries	*565*	0	*565*	6
Sub-total import	6 491		*6 491*	
Total volume, incl. French origin	**11 149**	**1 037**	**10 112**	**100%**

Source: Elaborations based on data from FAO, EUMOFA, SFAMN, and FEAP

- Seabass of **French origin**: Nearly 36% of seabass volume on the market is seabass of French origin. Of this, 38% is farmed seabass, and 62% is wild seabass. It is recognised by its premium quality, ultimate freshness, and larger size in the major part of the volume.

- Seabass of **Greek origin**: Greek seabass products have a 31% share in the total volume of seabass products on the French market, contributing most of the imported seabass. The entire volume is farmed seabass products.

- Seabass imported from the **Netherlands:** The Netherlands is a trading hub for seabass and seabream products, re-exporting the species from Greece and Turkey. It has been estimated that most of the volume is seabass of Turkish origin, supplemented by smaller volumes of seabass from Greece and other countries; therefore, nearly all seabass from the Netherlands is from aquaculture.

- Seabass of **Spanish origin:** Spanish companies contribute approximately 9% of seabass available on the French market, and most are farmed seabass.

[13] Export volume calculations are based on the provision that 100% of seabass exported from France is of French origin without re-export of seabass from other countries, according to the evaluation of the French aquaculture industry.

- Seabass of **Italian origin:** Approximately 5% of seabass on the French market comes from Italy, and nearly all are farmed species.

- Seabass of **Turkish origin**: The share of seabass of Turkish origin from direct deliveries from Turkey has been calculated at 4%, but in reality, the share of Turkish seabass is larger because of indirect deliveries from the Netherlands and other countries in the category of "other"; therefore, it has been estimated at 8–9% on the French market. All seabass from Turkey is from the aquaculture.

- Seabass originating from **other countries**: Seabass is also supplied to the French market by Croatia, as a seabass-producing country (approximately 180 tonnes). Other suppliers are other countries that do not produce seabass, but trade it; therefore, the origin of the species is difficult to estimate. It is projected that seabass of Greek and Turkish origin makes up most of the volume of those deliveries.

Table 19. Market shares of countries of origin of seabream (2017)

	Production/import volume, tonnes	Export volume, tonnes	Market volume, tonnes	Market share (%)
Production - French origin (wild and farmed)	2 815	685[14]	2 130	17
Import - Greece	*5 896*	*0*	*5 896*	46
Import - Netherlands	*1 267*	*0*	*1 267*	10
Import - Spain	*1 209*	*0*	*1 209*	9
Import - Turkey	*998*	*0*	*998*	8
Import - Italy	*895*	*0*	*895*	7
Import - other countries	*409*		*409*	3
Sub-total import	*10 674*		*10 674*	
Total volume, incl. French origin	**13 489**	***685***	**12 804**	**100%**

Source: Elaborations based on data from FAO, EUMOFA, SFAMN, and FEAP

- Seabream of **French origin**: Approximately 17% of seabream volume available on the market is French seabream. Of this, 66% is farmed seabream, and 34% is wild seabream. As with seabass, it is famous for its high quality, supreme freshness, and larger size, following the preferences and demand of consumers in the premium market segment.

[14] Export volume calculations are based on the provision that 100% of seabream exported from France is of French origin without re-export of seabream from other countries, according to the evaluation of the French aquaculture industry.

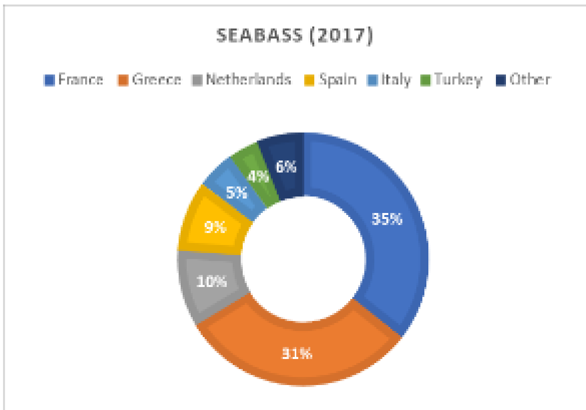
- Seabream of **Greek origin**: Greek producers provide the largest share of seabream to France. Nearly half of seabream (46%) on the French market is of Greek origin, and the entire volume is farmed products.

- Seabream imported from the **Netherlands**: As with seabass, 10% of seabream is supplied via the Netherlands. It is estimated that most of this volume is of Turkish origin, with a small contribution from Greece. It is assumed that nearly all seabream delivered by the Netherlands is from aquaculture.

- Seabream of **Spanish origin**: Approximately 9% of seabream on the French market is of Spanish origin; most is farmed products from Spanish aquaculture companies.

- Seabream of **Italian origin**: Italian aquaculture companies contribute approximately 7% of seabream to the French market. Usually, all of this volume is from aquaculture.

- Seabream originating from **other countries:** Croatia supplied 63 tonnes of seabream, Cyprus 34 tonnes, and other countries, such as Germany and the UK, re-exported seabream mainly from Turkish and Greek companies. Nearly the entire volume, except possibly insignificant volumes of wild seabream, is farmed seabream.



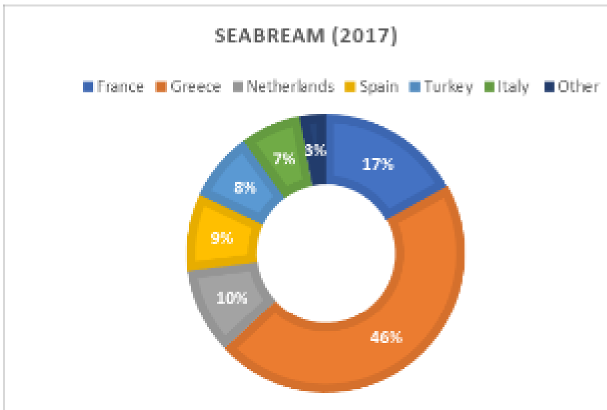


Figure 60 (left) and 61 (right). Shares of different countries in the origin of seabass and seabream available on the French market in 2017. *Source: Based on FAO, EUMOFA, SFAMN, and FEAP*

4.5 Certification, labels, and brands

Generally, French fish farmers have accepted **certification procedures**. These approaches not only ensure the consumer high-quality products, but they also promote and differentiate themselves, giving consumers additional choice through the use of labels. Producers not only make individual choices on the use of these labels, but there are also collective initiatives and brands being used. The labels usually promote special traits of the products, such as quality, an organic source, and sustainability, or show that the products are locally produced (in France). Consumer research[15] reveals that quality and an organic source are important factors in purchasing seafood products, and labels provide a form of reassurance. French consumers are also becoming more aware of the labels and their use. "Label Rouge" and AB–Agriculture biologique ("BIO"), which have been used for years, see awareness of their lables growing. Even more evident are new labels, such as MSC and ASC, which had limited awareness 2–3 years ago (7% and 5%, respectively), that are now recognised by 35% and 20% of the French population, respectively.

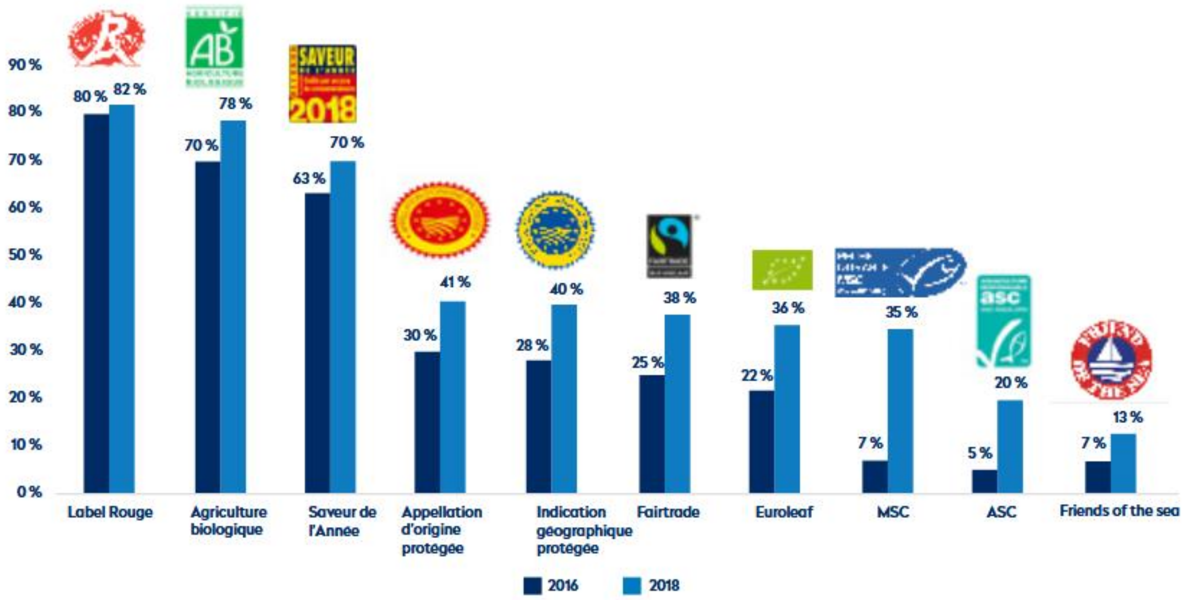


Figure 62. Labels reveal increased awareness by the French consumers in 2018 over 2016. *Source: NSC*

The attention given to food by the media and influencers regarding quality and production conditions provides consumers additional information that sways their choices. This indicates that more labels are becoming important to consumer choice in seafood. The well-established French labels like Label Rouge and BIO still have the largest impact on purchasing choice, with eighty per cent of consumers affirmed that Label Rouge was important when buying seafood in 2016 and with seventy percent affirmed that BIO label was important when buying seafood. Other labels satisfy different consumer needs, such as local production, greater animal welfare, or more sustainable production, which now seem to be more valued by French consumers.

15 "Seafood report 2018 – a new era for seafood in France", 2018, Norwegian Seafood Council

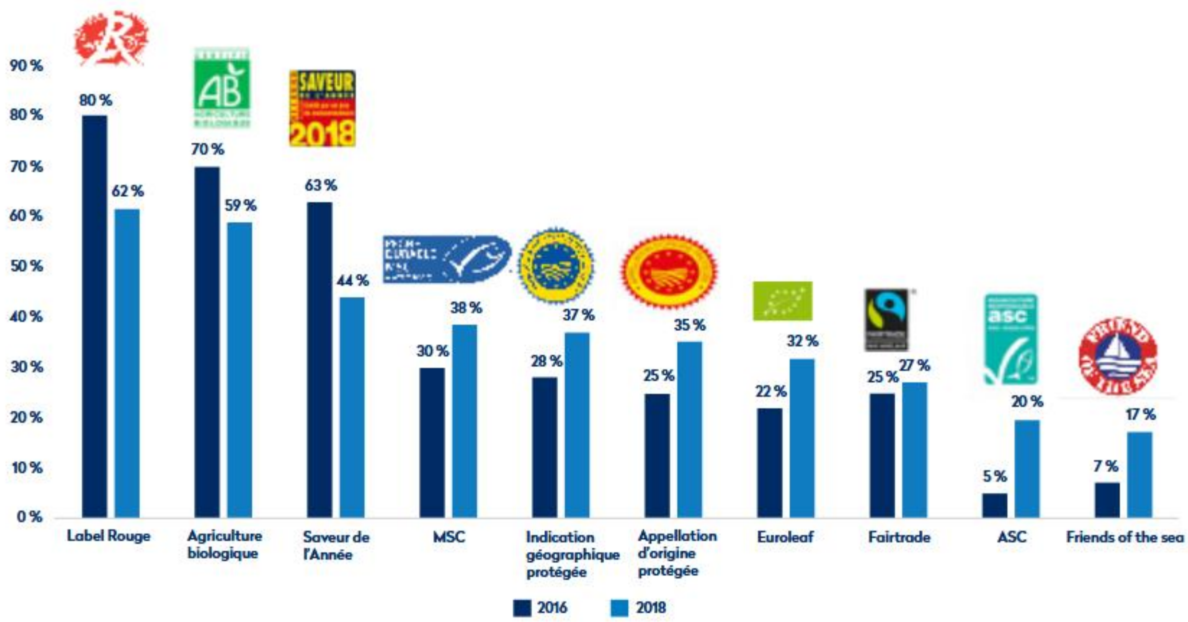


Figure 63. Label importance in French consumer choices in 2018, compared with 2016. *Source: NSC*

An overview of the main **French labels:**

Label Rouge

Label Rouge (Red Label) is a sign of quality assurance in France as defined by French law in 2006. According to the French Ministry of Agriculture and Food, "The Red Label certifies that a product has a specific set of characteristics establishing a superior level to that of a similar current product".

There are Label Rouge specifications for both seabass and seabream. However, there is currently no production of seabream labelled under the Label Rouge scheme. For seabass, Label Rouge production is low at approximately 30 tonnes in 2017. www.inao.gouv.fr

BIO

The Agriculture Biologique (BIO) label was established in 1985. It certifies organic production. To meet consumer demand, French fish farming is developing a growing segment of organic products. Estimated at 700 tonnes in 2007, production rose to 1 000 tonnes in 2010 and was estimated at 3 500 tonnes in 2018 (70% trout and approximately 17% seabass and seabream). www.agencebio.org

Charte Qualité – Aquaculture de nos Régions

The quality label “Aquaculture of our regions” is a collective label representing freshness, traceability, fish welfare, and quality. It also promotes local regional products. Approximately two-thirds of fish intended for consumption already meet the rigorously controlled requirements for quality and breeding conditions.

Fish with this label are caught and delivered to shelves within 24 and 72 hours, placing them among the freshest on the market. From the hatching of the eggs, to the delivery of live fish, to the processing sites, the whole life of the fish is logged.

Origine France Garantie

The “Guaranteed French Origin” certification was created in 2010 as a simple and easily understandable label promoting added value and artisan know-how.

The Origine France Garantie certification distinguishes itself from other certifications, such as **Made in France**, **Designed in France**, and **Made in France**, which are self-declarative and not specific enough.

Origine France Garantie is the only certification that confirms a product’s French origin. It is transversal (all sectors combined) and indisputable (the certification, mandatory, is carried out by an independent certifying body). The **Origine France Garantie** certification ensures consumers of the product’s traceability by giving a clear and objective indication of origin.

4.6 Development of prices of seabass and seabream

A series of the most recent price examples is provided in Table 20, which includes first sales prices of wild and farmed seabass and seabream of various sizes, both domestic and imported.

Table 20. Overview of first sales prices of wild and farmed seabass and seabream in France

RUNGIS NOTE HEBDO MAREE
(code=M2020)
Week 36, 02/09/19 au 07/09/19

Daily average value	**Monday**	**Tuesday**	**Wednesday**	**Thursday**	**Friday**	**Saturday**	**average price**
MIN Rungis Marée-Fraîche ***(code 121)*** *stadium* ***Gros***							
SEABASS [loup] wild trawled 1–2 kg France: per kg		12.00	12.00	12.00	12.00	12.00	**12.00**
SEABASS [loup] wild trawled 2–3 kg France: per kg		15.00	15.00	15.00	15.00	15.00	**15.00**
SEABASS [loup] wild trawled 800–1 000 g France: per kg		10.00	10.00	10.00	10.00	10.00	**10.00**
SEABASS [loup] wild trawled 800–1 000 g EU: per kg		11.00	11.00	11.00	11.00	11.00	**11.00**
SEABASS [loup] wild line-caught 1–2 kg France: per kg		23.00	22.50	22.50	21.50	21.50	**22.20**
SEABASS [loup] wild line-caught 1–2 kg EU: per kg		23.50	21.50	21.50	20.50	20.50	**21.50**
SEABASS [loup] wild line-caught 2–3 kg France: per kg		28.00	27.00	27.00	25.50	25.50	**26.60**
SEABASS de ligne + de 3 kg France: per kg		30.00	30.00	30.00	27.50	27.50	**29.00**
SEABASS fresh (whole) aquaculture 400–600 g France: per kg		6.20	6.20	6.20	6.20	6.20	**6.20**
SEABASS fresh (whole) aquaculture 400–600 g Import: per kg		5.00	5.00	5.00	5.00	5.00	**5.00**
SEABASS fresh (whole) aquaculture 600–800 g France: per kg		7.50	6.80	6.80	6.80	6.80	**6.94**

SEABASS fresh (whole) aquaculture 600–800 g Import: per kg		6.50	6.50	6.50	6.50	6.50	**6.50**
SEABASS fresh (whole) aquaculture 800–1 000 g France: per kg		9.50	9.00	9.00	9.00	9.00	**9.10**
SEA ASS fresh (whole) aquaculture 800–1 000 g U.E.: per kg		7.30	7.30	7.30	7.30	7.30	**7.30**
GILTHEAD BREAM aquaculture 300–400 g France: per kg		6.00	6.00	6.00	6.00	6.00	**6.00**
GILTHEAD BREAM aquaculture 300–400 g EU: per kg		5.20	5.20	5.20	5.20	5.20	**5.20**
GILTHEAD BREAM aquaculture 400–600 g France: per kg		6.50	6.50	6.50	6.50	6.50	**6.50**
GILTHEAD BREAM aquaculture 400–600 g EU: per kg		6.00	6.00	6.00	6.00	6.00	**6.00**
GILTHEAD BREAM aquaculture 600–800 g France: per kg		8.00	8.00	8.00	8.00	8.00	**8.00**
GILTHEAD BREAM aquaculture 600–800 g EU: per kg		6.20	6.20	6.20	6.20	6.20	**6.20**
GILT HEAD BREAM aquaculture 800–1 000 g France: per kg		9.50	9.50	9.50	9.50	9.50	**9.50**
GILTHEAD BREAM aquaculture 800–1 000 g EU: per kg		7.20	7.20	7.20	7.20	7.20	**7.20**
GILTHEAD BREAM wild 1 kg et + France: per kg		14.00	14.00	14.00	14.00	14.00	**14.00**
GILTHEAD BREAM wild 500–800 g France: per kg		12.50	12.50	12.50	12.50	12.50	**12.50**
GILTHEAD BREAM wild 800–1 000 g EU: per kg		13.50	13.50	13.50	13.50	13.50	**13.50**
GILTHEAD BREAM – Ecological, aquaculture 600–800 g Import: per kg		9.30	9.30	9.30	9.30	9.30	**9.30**

Source: FranceAgriMer