

THE FRENCH MARKET FOR SCALLOP – 2015

www.marketing-seafood

Table of Content

Some Results	8
Dwindling demand.....	8
New Species, New Sources of Supplies.....	8
The Retail Market for Fresh and Chilled Scallops.....	10
Decline in Consumption	10
or the Impact of the Economic Downturn.....	10
Live shell-on or Shucked Meat: What do Consumers Prefer?	13
Wholesale Prices of Fresh Scallops	14
Storecheck Catalogue, Fresh Scallop, Retail Market.....	17
Fresh shucked meat.....	17
Fresh shucked meat marinated	17
The Market for Frozen Scallop	21
Shucked Meat in Decline, Value Added Segment Vigorous.....	21
The Ups and Down of a Turbulent decade	21
Source: Kantar 2015 and historical data.....	21
Buyoant Market for Value Added Products.....	21
À la bretonne Recipe is the Undisputed Leader	22
The Meat Content is Only One Factor That Makes the Price.....	22
Storecheck Catalogue, Frozen, Retail Market	25
Shucked meat, roe-on.....	25
Shucked meat, roe-off.....	26
Half shell with sauce	27
Intense International Trade	33
France Buys Half of Europe Imports.....	33
Declining France Imports	38
Illustrated Catalogue (36 pictures).....	41

List of Tables

Table 1 Segments Covered by the Study	3
Table 2 Penetration Rate of Live and Fresh Shucked Scallops 2009 - 2014.....	11
Table 3 List of Producers / Processors of Scallop Based Products .	15
Table 4 European imports of all live, fresh and frozen scallops	32
Table 5 European Imports of Frozen Scallops, in Million €.....	32
Table 6 Imports of Frozen Scallops by countries, in Million €	33
Table 7 France Scallops Imports, in Million € by Product Type	37
Table 8 France Scallops Imports of Fresh Scallops, in Value.....	37
Table 9 France Scallops Imports of Fresh Scallops, in Tonnes	38
Table 10 Import Price of Pecten maximus.....	38
Table 11 Imports of Frozen Pecten, Chlamys with or without Shell .	39

List of figures

Fig. 1 Retail Sales of Whole Scallops, in Tonnes and €/kg.....	10
Fig. 2 Retail Sales of Fresh Shucked Meat, in Tonnes and €/kg	10
Fig. 3 Live and Fresh Scallops Market Shares 2003-2014	11
Fig. 4 Decline of sales of live or fresh, Retail Sales 2003-2014	11
Fig. 5 Fresh Shucked Meat is Dominantly Sold in Supermarkets	12
Fig. 6 Retail Price for Live Scallops.....	12
Fig. 7 Retail Price of Live Scallops	13
Fig. 8 Rungis Price for Fresh Shucked Scallops Roe-off	13
Fig. 9 Percentage of Scallop Meat in Value Added Preparations	14
Fig. 10 Sales of Frozen Shucked Meat on the Retail Market.....	20
Fig. 11 Correlation Scallop Meat Content and Price	21
Fig. 12 Scallop Meat Content in Frozen Half Shell in Sauce Products	22
Fig. 13 Scallop Meat Content in Frozen VAP other Than Half Shell	22
Fig. 14 Price for Frozen Half Shelves.....	23
Fig. 15 A Peak in average price, a Fall in total volumes	32
Fig. 16 Europe Frozen Scallops Suppliers, Market Share in 2014...	33
Fig. 17 Europe Imports of Frozen Scallops from Argentina	34
Fig. 18 Europe Imports of Frozen Scallops from Chile	34
Fig. 19 Europe Imports of Frozen Scallops from Vietnam	35
Fig. 20 Europe Imports of Frozen Scallops from the USA	35
Fig. 21 Europe Imports of Frozen Scallops from Peru	36
Fig. 22 Europe Imports of Frozen Scallops from Japan.....	36
Fig. 23 Europe Imports of Frozen Scallops from Canada	37
Fig. 24 Imports Price of Fresh Scallops from the USA.....	38
Fig. 25 Imports Price of Frozen Scallops.....	39