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Marketing Seafood has published its third edition of “the French Market for Scallops: Products and performances”, after the 2002 and 2010 editions.

This updated report is designed to help all producers, exporters, traders and processors of scallops to understand the market.

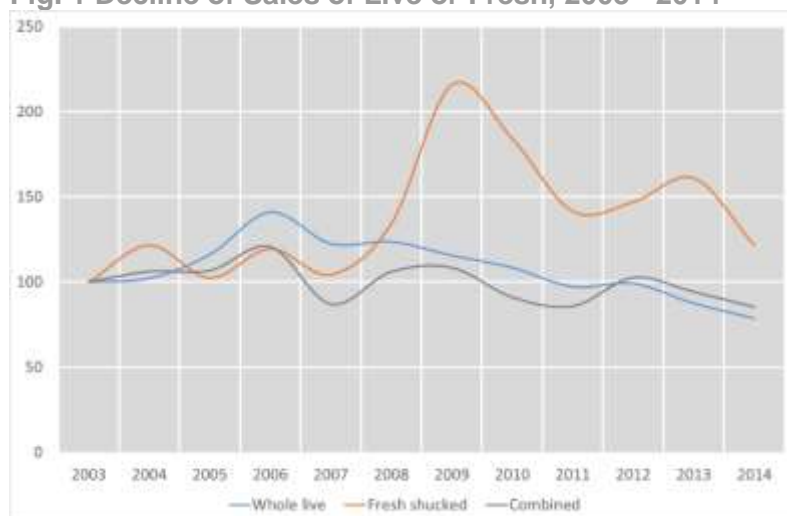
What has changed since 2010? Declining demand, new species, new products and still a large number of processors and Peru remains the dominant supplier.

With over 130,000 tonnes of scallops consumed in 2014, France keeps its undisputed position as Europe largest market for this delicate seafood, despite the weakened demand. The report draws a clear and precise picture of what is happening on the retail segment. The core of the report is based on a large scale storecheck (provided together with the report in a XL data base).

### Dwindling demand

The French are among world’s largest consumers, with over 2 kg whole weight equivalent consumed per annum per capita. Thus, the demand has shown signs of weaknesses in the past few years. The new report published by seafood marketing expert Marie Christine Monfort goes deep into the French retail market for scallops and reveals its dynamics and potential. It shows how this mature market is adapting to the shrinking purchasing power of the French. This report is an up-date of the 2011 edition.

Fig. 1 Decline of Sales of Live or Fresh, 2003 - 2014



Source: FAM

Considering Index 100 for 2003 situation, sales of live scallops dropped down gradually to 79 in 2014. By contrast, sales of fresh shucked meat climbed up to 216 in 2009, then crushed down to 122, last year.

**The total retail market for scallop based products is estimated at 230/250 million euros in 2014, showing a decline compared to the top year of 2009 which peaked at 280/300 million euros.**

### **A large number of scallops' processors all located in France**

The supply for value added products, incorporating scallop meat (from less than 10% to over 80%) has increased. These products often presented in natural shells, are processed into small to medium scale companies offering diverse profiles: some are scallops specialists; others deal with seafood in general, when a few, the largest ones are multi proteins (white meat, red meat, seafood) generalists. Out of the 24 companies identified, all are based in France and all process scallops from imported origin (see table below). The names of the companies (all scallops buyers) are provided in the report.

### **New Species**

France is open to all Pecten species. The document indicates the presence of four species that were not reported in our 2011 observations: *Amusium pleuronectes* from Vietnam or Indonesia, *V Argopecten gibbus* from the USA, *Chlamys albidus* from Russia, and *Annachlamys macassarensis* from Vietnam.

<b>Species on the market</b>	<b>Origin</b>
<i>Amusium pleuronectes</i>	Vietnam, Indonesia
<i>Annachlamys macassarensis</i>	Vietnam
<i>Argopecten circularis</i>	Mexico, USA
<i>Argopecten gibbus</i>	USA
<i>Argopecten iradians</i>	USA
<i>Argopecten purpuratus</i>	Chile, Peru
<i>Chlamys albidus</i>	Russia
<i>Chlamys islandica</i>	Iceland
<i>Chlamys nobilis</i>	Vietnam
<i>Chlamys opercularis</i>	Faroe Islands, Isle of Man, Scotland, Ireland, England, France, United Kingdom, Denmark, Canada
<i>Zygochlamys patagonica</i>	Argentina, Uruguay, USA, Brazil

## **The Storecheck**

The points of sales of the following retail chains were visited in the period from May to October 2015. Aldi, Auchan, Carrefour, Casino, Grand Frais, Intermarché, Leader price, Leclerc, Lidl, Picard and System U.

If the supply of shucked meat, chilled and frozen has dropped compared to 2011, interesting developments have been observed on the segment of value added products, with new recipes, new packaging.

The report and the 200 products' storecheck are designed for ensuring scallops' exporters, traders and processors to grab rapidly a precise picture of today retail market for scallops and scallops based products sold in France.

**The complete report is sold here for 400 euros.**

<http://marketing-seafood.com/en/news/7-0-7/news/new-market-report-scallops-in-france>

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