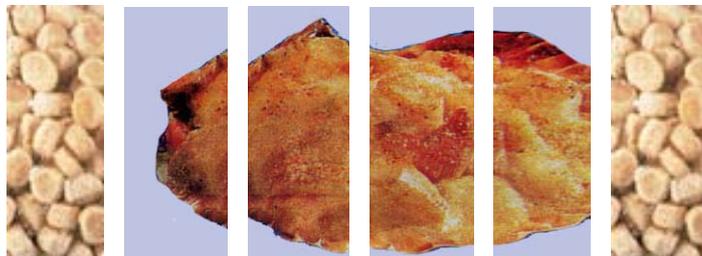




Fresh and Frozen Scallops in France Products and Performances



June 2002

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Content and Scope

Fresh and frozen scallop supply in France

France is by far the largest European outlet for scallops with over 100,000t consumed per year¹ (in equivalent shell-on products). Large volumes of imported species enter the market, to complement domestic landings of *Pecten maximus* (8,000t to 12,000t) and *Aequipecten opercularis* (a few hundred tonnes per annum). These high profile species are marketed in three dominant forms.

- **Live shell-on** (mainly *Pecten maximus*), distributed in production regions and in important urban centres,
- **Shucked meat, chilled or frozen** (IQF, Block), roe-on or roe-off, purchased by retailers, caterers and the processing industry,
- **Preparations** such as shucked meat in sauce (20% to 60% meat, the rest being sauce), sold chilled or frozen, mainly through supermarkets.

This market watch report presents how scallop is retailed in multiple retail stores (supermarkets, hard discount shops, freezer centres) and sold to restaurants. Which species, live, chilled or frozen, in what processed form, which size, what weight, price, packaging, processed by whom, labelled or not, etc.

Market segments described

Retail Market	YES
Catering market	YES
Industry segment	NO

This market watch presents products available on the market in 2002, from raw unprocessed fish to ready-to-eat products.

In addition to a comprehensive scallop database, in this report you will find a clear picture of the total seafood market (size, 1996-2001 development) and a presentation of individual market segments (retail/wholesale, fresh/frozen, raw/pre-processed/processed). Market trends are illustrated and commented on.

At last but not least, Appendix B and C provide comprehensive contact details of scallop importers and seafood industrialists using scallops.

Sources of information

Store checks were run in May 2002, in points of sale of the following retail chains: Auchan, Carrefour, Casino, Intermarché, Leclerc, Picard, Monoprix, Lidl. Prices are given VAT (5,5%) included.

Wholesaler's products are as well reported. This information originates directly from wholesaling companies products lists, as disseminated in January to May 2002. Prices are given VAT (5,5%) not included.

¹ Considering an average 18% yield applied on to production – exports + imports.

Table of Content (49 pages)

1. The Market for Food

- 1.1. Size and trends (Income, budget devoted to food, at-home and catering expenses, Food consumption, price development, by type)
- 1.2. Latest events

2. The Market for Seafood

- 2.1. Size and trends (seafood consumption, quality concerns, brands and label, impact of BSE crisis, prices development)
- 2.2. Latest events

3. The Market for Live and Fresh Scallop

- 3.1. The retail market
 - 3.1.1. Detailed products description (based on storechecks)
 - 3.1.2. Performances (prices and sales development 1996-2001)
- 3.2. The catering sector
 - 3.2.1. Detailed products description offered to the catering industry
- 3.3. Supplies/ imports development

4. The Market for Frozen Scallop

- 4.1. The retail market
 - 4.1.1. Detailed products description (based on storechecks)
 - 4.1.2. Performances (prices and sales development 1996-2001)

Appendix A: Pictures of Products

Appendix B: Lists of Food Industrialists using scallops

Appendix C: Lists of Importers

The Author

The report was prepared and edited by Marie Christine Monfort, seafood marketing expert.

The author operates since 1990 as a marketing consultant 100% dedicated to seafood products in Europe. She assists private companies in their attempts to meet European market requirements and to reach professional buyers. She also cooperates with public institutions, (National ministries of Fisheries, universities, research institutes) and international organisations (EU Commission, FAO, CDI, etc.).

She has published several multi-species multi-annual market watch reports. This single species market watch dedicated to fresh and frozen scallop is the second issue of a new series. Salmon was published in February 2002. Whitefish and shrimp will shortly be analysed along similar lines.

As a privileged market "watcher" Marie Christine Monfort is correspondent to the Globefish European Fish Price Report edited by FAO every month.

Marie Christine Monfort is the permanent correspondent in France of magazine Seafood International.

Other Publications

Fresh and Frozen Tropical Shrimps: Products and Performances (coming November 2003).....	560 €
Fresh and frozen Salmon: Products and Performances (February 2002).....	290 €

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