



**MARKET ACCESS SECRETARIAT
Global Analysis Report**

Competitive Trade Analysis Crustacean Products in France

August 2016



REPORT CONTENT SUMMARY

This report looks to highlight crustacean products imported into France, and attempts to identify the best opportunities for Canadian exports.

Specifically, the data analysis that follows focusses on the top ten French crustacean product imports, of which Canada maybe a supplier. It identifies the gap between France’s imports from the world and the proportion provided by Canada, and then outlines top international competitors.

Unless otherwise specified, all figures in this document are based on import data as reported by France Customs, and were sourced from Global Trade Atlas (2016).

FRANCE MARKET SUMMARY

France’s supply of crustacean products was less diversified than other sea products, as it imported crustaceans from fewer than fifty countries. The country’s top suppliers in 2015 were Ecuador (with 19.9% market share), India (10.5%), United Kingdom (9.1%), Vietnam (8.1%), and Netherlands (5.8%).

Canada ranked 6th as a non-EU supplier of crustaceans products to France. Top French imported products were frozen shrimp and prawns with 16.2% of total imports, followed by live, fresh, dried salted or in brine lobster (12.2%) and prepared shrimp and prawns in airtight container (5.2%).

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TRADE OVERVIEW

Global Trade Atlas data indicates that France is a significant importer of crustacean products, as its domestic production is considerably lower than its total demand.

In 2015 France imported over C\$1.4 billion of crustacean products from the world, and C\$37.8 million from Canada (based on France imports data) as the 12th supplier and 6th non-EU supplier.

France's Top Ten Suppliers of Crustacean Products, C\$ millions

Country		2011	2012	2013	2014	2015	CAGR % 2011-15
World		1,273.00	1,192.41	1,321.65	1,516.62	1,487.45	3.97
1	Ecuador	165.05	172.20	242.75	292.20	297.19	15.84
2	India	101.02	97.52	118.77	170.66	156.65	11.59
3	United Kingdom	130.08	122.77	132.93	139.19	136.61	1.23
4	Vietnam	76.43	56.10	73.05	125.44	120.56	12.07
5	Netherlands	86.20	95.34	105.73	92.72	86.26	0.02
6	Madagascar	102.92	100.70	94.18	91.32	71.71	-8.64
7	Spain	42.14	47.55	44.00	53.86	50.12	4.43
8	Belgium	56.56	43.13	43.56	44.35	48.90	-3.57
9	Ireland	40.06	38.99	41.57	47.15	47.95	4.60
10	Bangladesh	43.08	36.48	56.38	49.11	42.90	-0.10
12	Canada	35.94	33.15	26.34	32.89	37.80	1.27

France's Top Ten Suppliers of Crustacean Products, % Shares

Country		2011	2012	2013	2014	2015	PP Change 2011-15
1	Ecuador	12.97	14.44	18.37	19.27	19.98	7.01
2	India	7.94	8.18	8.99	11.25	10.53	2.60
3	United Kingdom	10.22	10.30	10.06	9.18	9.18	-1.03
4	Vietnam	6.00	4.70	5.53	8.27	8.10	2.10
5	Netherlands	6.77	8.00	8.00	6.11	5.80	-0.97
6	Madagascar	8.08	8.45	7.13	6.02	4.82	-3.26
7	Spain	3.31	3.99	3.33	3.55	3.37	0.06
8	Belgium	4.44	3.62	3.30	2.92	3.29	-1.15
9	Ireland	3.15	3.27	3.15	3.11	3.22	0.08
10	Bangladesh	3.38	3.06	4.27	3.24	2.88	-0.50
12	Canada	2.82	2.78	1.99	2.17	2.54	-0.28



Crustacean Products Supply Gap, C\$ Millions

	2011	2012	2013	2014	2015	CAGR % 2011-15
France's imports from the world	1,273.00	1,192.41	1,321.65	1,516.62	1,487.45	3.97
France's imports from Canada	35.94	33.15	26.34	32.89	37.80	1.27
Supply gap	1,237.06	1,159.26	1,295.31	1,483.72	1,449.65	4.04

France's Top Ten Crustacean Products Imports from the World, C\$ Millions and % Share

Commodity	Description	C\$ Millions			% Share			% Change 2015/2014
		2013	2014	2015	2013	2014	2015	
Total		4,645.04	4,886.23	4,929.85	100.00	100.00	100.00	0.89
030617	Frozen shrimp and prawns	790.61	815.94	798.60	17.02	16.7	16.2	-2.12
030622	Live, fresh, chilled, dried, salted, or in brine lobster	707.14	702.38	604.54	15.22	14.37	12.26	-13.93
160521	Prepared shrimp and prawns not airtight container	198.62	234.79	256.92	4.28	4.81	5.21	9.42
160529	Prepared shrimp and prawns in airtight container	184.13	237.61	206.38	3.96	4.86	4.19	-13.14
030625	Fresh Norway lobsters	196.61	207.89	206.16	4.23	4.25	4.18	-0.83
160510	Prepared crab	164.51	158.53	190.81	3.54	3.24	3.87	20.36
030624	Live, fresh/chilled, dried, salted, or in brine crab	141.94	152.49	170.44	3.06	3.12	3.46	11.77
030614	Frozen crab, including in shell	150.24	154.46	159.64	3.23	3.16	3.24	3.36
030626	Fresh cold-water shrimp and prawns	119.44	138.45	151.63	2.57	2.83	3.08	9.52
030615	Frozen Norway lobster	127.41	132.31	135.54	2.74	2.71	2.75	2.44



1. FROZEN SHRIMP AND PRAWNS

France's Top Ten Suppliers of Frozen Shrimp and Prawns, C\$ Millions and % Share

Country	C\$ Millions			% Share			% Change 2015/2014
	2013	2014	2015	2013	2014	2015	
World	775.04	909.42	883.66	100.00	100.00	100.00	- 2.83
Ecuador	234.73	280.13	287.20	30.29	30.80	32.50	2.53
India	107.85	151.66	140.95	13.91	16.68	15.95	- 7.06
Madagascar	89.94	86.33	68.80	11.60	9.49	7.79	- 20.30
Vietnam	39.12	72.97	66.16	5.05	8.02	7.49	- 9.33
Bangladesh	51.65	44.99	41.03	6.66	4.95	4.64	- 8.81
Nigeria	23.07	30.52	38.36	2.98	3.36	4.34	25.68
Venezuela	40.63	37.32	27.95	5.24	4.10	3.16	- 25.10
Peru	6.27	10.79	21.82	0.81	1.19	2.47	102.24
Belgium	14.70	17.19	21.54	1.90	1.89	2.44	25.26
Spain	21.74	23.71	20.31	2.80	2.61	2.30	- 14.35
Canada	0.41	0.30	0.37	0.05	0.03	0.04	25.31

Frozen Shrimp and Prawns Supply Gap, C\$ Millions

	2013	2014	2015	CAGR % 2013-15
France's imports from the world	775.04	909.42	883.66	6.78
France's imports from Canada	0.41	0.30	0.37	-5.18
Supply gap	774.63	909.12	883.29	6.78



2. LIVE, FRESH, CHILLED, SALTED OR IN BRINE LOBSTER

France's Top Ten Suppliers of Live, Fresh, Chilled, Dried, Salted or in Brine Lobster,
C\$ Millions and % Share

Country	C\$ Millions			% Share			% Change 2015/2014
	2013	2014	2015	2013	2014	2015	
World	79.52	87.12	86.19	100.00	100.00	100.00	- 1.07
United Kingdom	28.93	34.35	34.16	36.38	39.43	39.64	- 0.54
United States	31.02	29.38	30.72	39.01	33.73	35.65	4.56
Ireland	7.16	9.66	9.14	9.00	11.08	10.61	- 5.33
Canada	9.31	9.56	9.10	11.70	10.97	10.56	- 4.74
Spain	0.70	0.80	1.09	0.88	0.92	1.26	35.50
Ecuador	0.23	1.43	0.77	0.29	1.64	0.90	- 45.81
Belgium	0.86	0.59	0.46	1.08	0.67	0.53	- 22.51
France	0.62	0.50	0.34	0.78	0.57	0.39	- 31.88
Netherlands	0.18	0.34	0.28	0.23	0.39	0.33	- 16.98
Nigeria	0.00	0.17	0.04	0.00	0.19	0.05	- 74.75

Live, Fresh, Chilled, Dried, Salted or in Brine Lobster Supply Gap, C\$ Millions

	2013	2014	2015	CAGR % 2013-15
France's imports from the world	79.52	87.12	86.19	4.11
France's imports from Canada	9.31	9.56	9.10	-1.10
Supply gap	70.21	77.56	77.08	4.78



3. PREPARED SHRIMP AND PRAWNS NOT IN AIRTIGHT CONTAINER

France's Top Ten Suppliers of Prepared Shrimp and Prawns not in Airtight Container,
C\$ Millions and % Share

Country	C\$ Millions			% Share			% Change
	2013	2014	2015	2013	2014	2015	2015/2014
World	60.51	70.44	72.18	100.00	100.00	100.00	2.48
Netherlands	26.30	22.14	22.75	43.46	31.43	31.52	2.77
Vietnam	3.66	8.17	10.59	6.06	11.60	14.67	29.67
India	3.02	6.21	8.64	4.99	8.81	11.96	39.13
Honduras	0.55	3.25	5.57	0.91	4.62	7.71	71.15
Ecuador	4.09	6.87	5.19	6.76	9.75	7.19	- 24.43
Belgium	4.39	5.07	4.49	7.26	7.20	6.22	- 11.41
Denmark	3.03	3.49	2.91	5.01	4.96	4.03	- 16.65
Thailand	5.09	3.78	2.14	8.41	5.36	2.97	- 43.31
Spain	1.38	2.22	1.72	2.29	3.15	2.39	- 22.39
Norway	0.49	0.43	1.40	0.81	0.61	1.94	224.34
Canada	0.28	0.50	0.22	0.47	0.71	0.30	- 56.60

Prepared Shrimp and Prawns not in Airtight Container Supply Gap, C\$ Millions

	2013	2014	2015	CAGR % 2013-15
France's imports from the world	60.51	70.44	72.18	9.22
France's imports from Canada	0.28	0.50	0.22	-12.72
Supply gap	198.62	234.79	256.92	9.32



4. PREPARED SHRIMP AND PRAWNS IN AIRTIGHT CONTAINER

**France's Top Ten Suppliers of Prepared Shrimp and Prawns in Airtight Container,
C\$ Millions and % Share**

Country	\$C Millions			% Share			% Change 2015/2014
	2013	2014	2015	2013	2014	2015	
World	61.16	73.70	70.47	100.00	100.00	100.00	- 4.39
Vietnam	16.74	25.70	25.79	27.38	34.87	36.60	0.37
Honduras	3.57	7.09	6.77	5.84	9.61	9.60	- 4.49
Thailand	16.05	3.82	6.65	26.24	5.18	9.44	74.39
India	6.35	10.31	4.75	10.38	13.99	6.74	- 53.95
Netherlands	3.67	3.12	4.62	6.00	4.23	6.56	48.25
Germany	1.47	2.21	3.92	2.40	3.00	5.57	77.40
Denmark	4.04	5.96	3.83	6.60	8.08	5.43	- 35.75
Indonesia	1.39	5.70	3.65	2.28	7.73	5.18	- 35.95
Ecuador	2.02	2.66	2.77	3.30	3.61	3.93	4.01
Belgium	1.93	2.11	2.61	3.15	2.87	3.71	23.69
Canada	0.00	0.00	0.07	0.00	0.00	0.11	N/C

Prepared Shrimp and Prawns in Airtight Container Supply Gap, C\$ Millions

	2013	2014	2015	CAGR % 2013-15
France's imports from the world	61.16	73.70	70.47	7.34
France's imports from Canada	0.00	0.00	0.07	N/C
Supply gap	61.16	73.70	70.39	7.28

N/C: Not Calculable



5. FRESH NORWAY LOBSTER**

France's Top Ten Suppliers of Fresh Norway Lobster**, C\$ Millions and % Share

Country	\$C Millions			% Share			% Change 2015/2014
	2013	2014	2015	2013	2014	2015	
World	59.37	62.60	56.47	100.00	100.00	100.00	- 9.80
United Kingdom	45.56	48.00	45.91	76.75	76.68	81.30	- 4.36
Denmark	9.36	10.23	7.63	15.76	16.35	13.51	- 25.45
Netherlands	1.00	1.31	0.93	1.69	2.09	1.64	- 29.33
Ireland	1.89	1.57	0.93	3.19	2.50	1.64	- 40.94
Belgium	0.10	0.25	0.28	0.16	0.40	0.50	12.73
Spain	0.78	0.48	0.25	1.31	0.77	0.45	- 47.46
Iceland	0.06	0.43	0.22	0.10	0.69	0.38	- 49.93
Portugal	0.08	0.09	0.13	0.13	0.14	0.23	49.16
France Territories	0.30	0.17	0.13	0.50	0.27	0.22	- 25.30
Sweden	0.08	0.05	0.05	0.14	0.07	0.09	5.25

**Note: Canada do not exports Norway lobster products to the world.

Fresh Norway Lobster Supply Gap, C\$ Millions

	2013	2014	2015	CAGR % 2013-15
France's imports from the world	196.61	207.89	206.16	2.40
France's imports from Canada	0.00	0.00	0.00	N/C
Supply gap	195.57	206.45	204.65	2.29

N/C: Not Calculable



6. PREPARED CRAB

France's Top Ten Suppliers of Prepared Crab, C\$ Millions and % Share

Country	\$C Millions			% Share			% Change 2015/2014
	2013	2014	2015	2013	2014	2015	
World	42.98	45.42	47.48	100.00	100.00	100.00	4.53
Vietnam	12.33	14.44	14.13	28.70	31.80	29.75	- 2.20
Belgium	10.75	11.24	12.80	25.01	24.75	26.95	13.81
Indonesia	6.40	5.65	6.18	14.89	12.43	13.02	9.48
Chile	4.34	3.79	4.31	10.09	8.35	9.08	13.69
Canada	1.72	2.38	3.00	4.01	5.25	6.31	25.66
Korea South	2.10	1.23	1.95	4.88	2.71	4.11	58.52
Italy	0.02	0.58	0.88	0.04	1.27	1.85	52.59
China	1.68	1.41	0.86	3.91	3.10	1.82	- 38.78
United States	0.15	1.32	0.65	0.34	2.91	1.37	- 50.73
United Kingdom	0.70	1.01	0.61	1.63	2.23	1.28	- 39.91

Prepared Crab Supply Gap, C\$ Millions

	2013	2014	2015	CAGR % 2013-15
France's imports from the world	42.98	45.42	47.48	5.11
France's imports from Canada	1.72	2.38	3.00	31.89
Supply gap	41.25	43.04	44.49	3.84



7. LIVE, FRESH/CHILLED, DRIED, SALTED, OR IN BRINE CRAB**

France's Top Ten Suppliers of Live, fresh/chilled, dried, salted, or in brine crab, C\$ Millions and % Share

Country	\$C Millions			% Share			% Change 2015/2014
	2013	2014	2015	2013	2014	2015	
World	36.46	40.18	43.85	100.00	100.00	100.00	9.11
United Kingdom	17.35	19.81	22.77	47.59	49.29	51.94	14.98
Ireland	16.72	16.78	18.68	45.85	41.75	42.59	11.32
France	1.09	1.77	0.71	3.00	4.41	1.63	- 59.71
Spain	0.51	0.51	0.44	1.40	1.27	1.01	- 13.44
Netherlands	0.02	0.14	0.37	0.04	0.34	0.84	167.81
Indonesia	0.17	0.21	0.22	0.47	0.52	0.50	5.79
Belgium	0.15	0.18	0.18	0.41	0.45	0.41	- 1.04
India	0.06	0.06	0.15	0.16	0.15	0.35	160.76
Denmark	0.15	0.17	0.14	0.41	0.43	0.31	- 20.13
Greece	0.04	0.05	0.09	0.10	0.14	0.20	58.93

****Note:** Canada exports live, fresh/chilled dried salted or in brine crab the world, but not a supplier to France.

Live, fresh/chilled, dried, salted, or in brine crab Supply Gap, C\$ Millions

	2013	2014	2015	CAGR % 2013-15
France's imports from the world	36.46	40.18	43.85	9.66
France's imports from Canada	0.00	0.00	0.00	N/C
Supply gap	36.46	40.18	43.85	9.66

N/C: Not Calculable



8. FROZEN CRAB INCLUDING IN SHELL

France's Top Ten Suppliers of Frozen Crab Including in Shell, C\$ Millions and % Share

Country	\$C Millions			% Share			% Change 2015/2014
	2013	2014	2015	2013	2014	2015	
World	36.75	41.67	39.76	100.00	100.00	100.00	- 4.58
United Kingdom	11.03	13.30	12.32	30.02	31.92	30.97	- 7.41
Russia	2.38	6.12	7.21	6.49	14.68	18.13	17.81
Ireland	5.04	5.16	4.75	13.72	12.38	11.95	- 7.91
Norway	4.78	2.94	3.65	13.01	7.04	9.17	24.28
Madagascar	4.04	4.73	2.78	11.01	11.34	7.00	- 41.14
Chile	1.16	1.59	2.52	3.15	3.81	6.34	58.65
Belgium	2.89	2.06	1.49	7.87	4.95	3.74	- 27.90
United States	1.34	0.75	1.04	3.64	1.79	2.62	39.22
Vietnam	0.28	1.20	0.70	0.75	2.87	1.76	- 41.34
Canada	0.35	0.31	0.17	0.95	0.74	0.44	- 43.07

Frozen Crab Including in Shell Supply Gap, C\$ Millions

	2013	2014	2015	CAGR % 2013-15
France's imports from the world	36.75	41.67	39.76	4.02
France's imports from Canada	0.35	0.31	0.17	-29.12
Supply gap	36.40	41.36	39.59	4.29



9. FRESH COLD WATER SHRIMP AND PRAWNS

France's Top Ten Suppliers of Fresh Cold Water Shrimp and Prawns, C\$ Millions and % Share

Country	\$C Millions			% Share			% Change 2015/2014
	2013	2014	2015	2013	2014	2015	
World	32.14	35.18	37.61	100.00	100.00	100.00	6.89
Netherlands	23.28	25.71	26.71	72.42	73.08	71.02	3.88
Spain	7.77	7.76	9.80	24.19	22.07	26.06	26.24
Mozambique	0.00	0.00	0.40	0.00	0.00	1.06	0.00
Germany	0.06	0.08	0.25	0.20	0.23	0.66	212.01
Denmark	0.08	0.19	0.13	0.26	0.55	0.34	- 34.58
Ireland	0.23	0.13	0.10	0.71	0.38	0.28	- 20.76
Belgium	0.08	0.05	0.09	0.26	0.15	0.25	74.12
United Kingdom	0.15	0.03	0.07	0.45	0.07	0.19	181.42
Italy	0.37	0.44	0.03	1.16	1.24	0.09	- 92.10
Singapore	0.05	0.00	0.01	0.15	0.01	0.02	94.24

****Note:** Canada exports cold-water shrimp and prawns products, but is not a supplier to France

Fresh Cold Water Shrimp and Prawns Supply Gap, C\$ Millions

	2013	2014	2015	CAGR % 2013-15
France's imports from the world	32.14	35.18	37.61	8.18
France's imports from Canada	0.00	0.00	0.00	N/C
Supply gap	32.14	35.18	37.61	8.18

N/C: Not Calculable



10. FROZEN NORWAY LOBSTER

France's Top Ten Suppliers Frozen Norway Lobster, C\$ Millions and % Share

Country	\$C Millions			% Share			% Change 2015/2014
	2013	2014	2015	2013	2014	2015	
World	30.09	31.74	31.43	100.00	100.00	100.00	- 0.97
United Kingdom	15.34	12.23	11.15	50.99	38.53	35.48	- 8.79
Ireland	6.21	9.32	9.07	20.62	29.38	28.85	- 2.75
Netherlands	3.27	4.13	4.93	10.86	13.02	15.69	19.34
Denmark	1.87	2.14	1.95	6.22	6.73	6.20	- 8.71
Spain	1.99	1.58	1.83	6.62	4.99	5.81	15.44
Iceland	0.34	1.55	1.48	1.14	4.87	4.72	- 4.17
Thailand	0.43	0.43	0.54	1.42	1.35	1.70	24.88
Belgium	0.12	0.22	0.26	0.40	0.68	0.83	20.93
Italy	0.02	0.03	0.05	0.05	0.09	0.16	66.84
India	0.00	0.01	0.04	0.00	0.03	0.14	324.63

****Note:** Canada do not exports Frozen Norway lobsters products to the world.

Frozen Norway Lobster Supply Gap, C\$ Millions

	2013	2014	2015	CAGR % 2013-15
France's imports from the world	30.09	31.74	31.43	3.14
France's imports from Canada	0.00	0.00	0.00	N/C
Supply gap	30.09	31.74	31.43	3.14

N/C: Not Calculable



RETAIL ENVIRONMENT

French demand for crustaceans remains high among European countries. According to recent trade data, the total import value increased by almost 4% to reach C\$1.4 billion. However, at the retail level, Euromonitor notes that price remained the primary factor in purchasing decisions as crustaceans are viewed as high value price products and difficult to prepare and cook. The volume of crustaceans sold increased by 4.5%, reaching 183,000 tonnes in 2015. Euromonitor notes that sales of crustaceans at the foodservice level are also declining citing the price as a factor.

Historic Sales of Fish and Seafood by Category: Total Volume 2011-2015

'000 tonnes	2011	2012	2013	2014	2015
Crustaceans	18.3	17.7	17.1	17.5	18.3
Fish	186	193.4	187.9	184.3	177.7
Molluscs and Cephalopods	111.1	110.6	112.6	115.5	120.8
Fish and Seafood	315.4	321.7	317.6	317.4	316.8

Forecast Sales of Fish and Seafood by Category: Total Volume 2016-2020

'000 tonnes	2016	2017	2018	2019	2020
Crustaceans	18.8	19.1	19.1	19.0	18.8
Fish	173.2	170.1	168.9	166.9	165.4
Molluscs and Cephalopods	124.6	127.8	128.7	127.5	125.5
Fish and Seafood	316.6	317	316.8	313.5	309.7

Source for both: Euromonitor 2016

DISTRIBUTION CHANNELS

The retail channel accounted for over 81% of fresh fish and seafood sales in France, followed by the foodservice channel with 14.4%. The share of the retail channel increased between 2011 and 2015, while that of the foodservice and institutional channels saw a slight decline over that same period.

Distribution of Fresh Fish and Seafood Sales in France – Percentage (%) Breakdown Based on Volume Sales

% total volume	2011	2012	2013	2014	2015
Retail	80.9	81.6	82.7	82.2	81.8
Foodservice	15.0	14.8	14.6	14.5	14.4
Institutional	4.1	3.6	2.7	3.3	3.8
Total	100	100	100	100	100

Source: Euromonitor 2016.



FOR MORE INFORMATION

International Trade Commissioners can provide Canadian industry with on-the-ground expertise regarding market potential, current conditions and local business contacts, and are an excellent point of contact for export advice.

Overview of Trade Commissioner Services in France

<http://www.tradecommissioner.gc.ca/e-f/fr/index.htm>

Find a Trade Commissioner

www.tradecommissioner.gc.ca/eng/find-trade-contacts.jsp

For additional intelligence on this and other markets, the complete library of Global Analysis reports can be found under *Statistics and Market Information* at the following link, arranged by sector and region of interest:

www.ats-sea.agr.gc.ca

For additional Information on Seafood Expo Global 2016, please contact:

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Trade Show Strategy and Delivery
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RESOURCES:

Euromonitor International, 2016. Fish and Seafood in France.

Euromonitor International, 2016. *Packaged Food in France*.

Global Trade Atlas Database, 2016.

Global Trade Tracker, 2016.

<http://www.francefilierepeche.fr>

<http://www.franceagrimer.fr>

<http://www.fao.org/fishery/statistics/en>



Competitive Trade Analysis: Crustaceans Products in France

Global Analysis Report

Prepared by: Karim Zarrouki, Senior Market Analyst

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