

Marie Christine Monfort



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Marie Christine Monfort, a senior consultant at Marketing Seafood and Sea-Matters, has been a marketing consultant dedicated to seafood issues related to the European market since 1990.

Through market studies, she assists private companies in their efforts to meet European market requirements and reach professional buyers.

She also cooperates with public institutions, international organizations and research institutes.

Monfort has a master's degree in economics from Sorbonne University in Paris.



Markets And Marketing Farmed Seafood In Europe: Focus On France

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Aquaculture items European market Focus France



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Europe a 13 million tonnes seafood market



Wild and farmed

13 million tonnes

Wild
10 million

Aquaculture
3 million

Finfish 8
Shellfish 2

Finfish 1,5 million
Shellfish 1,5
million

But not one market a patchwork of different markets



Of great complexity

- Market size and consumption per capita ☒
- Consumers' habits and preferences ☒
- Distribution ☒
- Consumption of farmed seafood ☒
- Sensitivity to environmental issues ☒

Proportion of farmed seafood

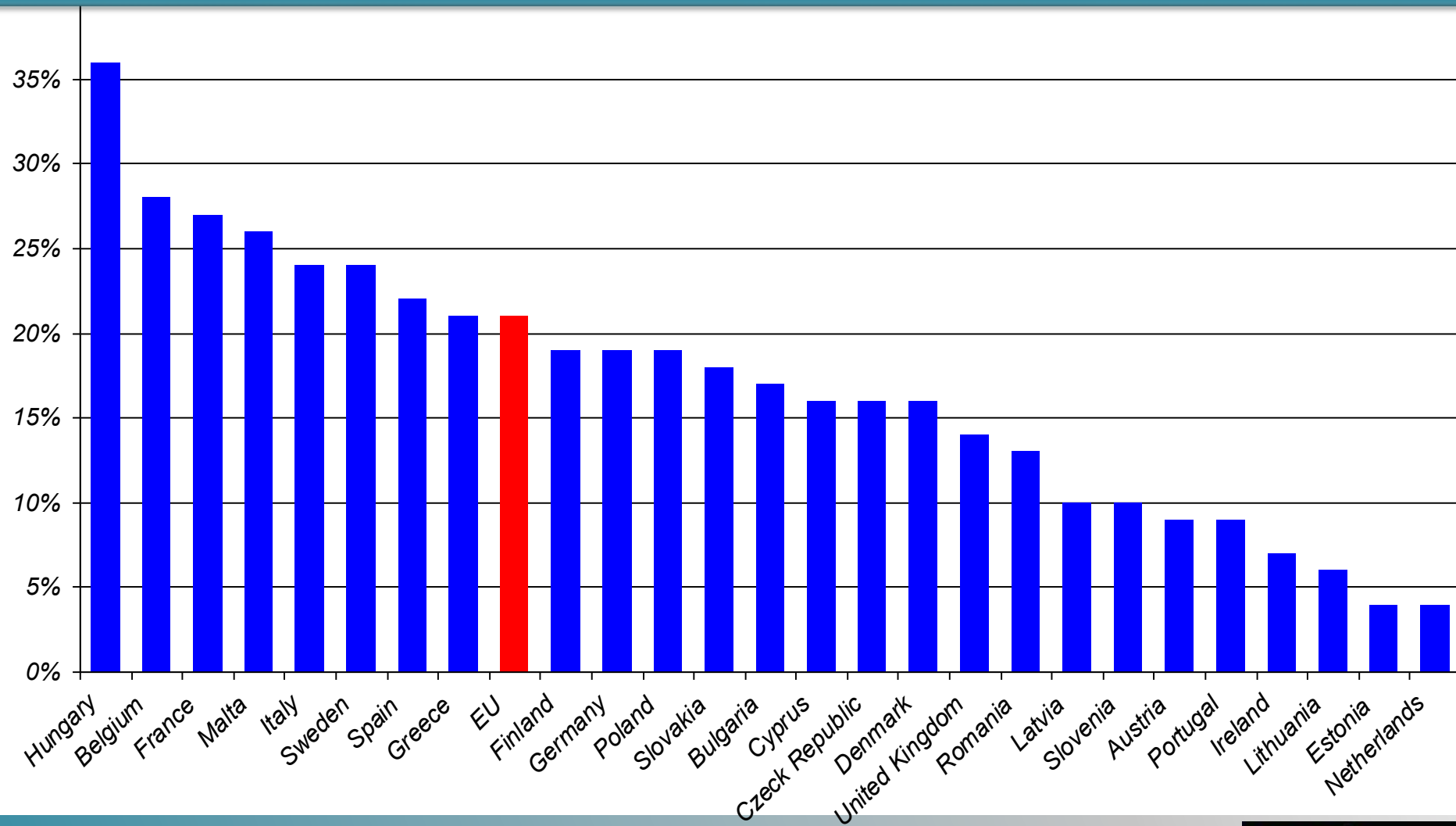


Image of farmed seafood

- Farmed seafood has an excellent image in terms of:
 - Nutritional content
 - Freshness
 - Year-round availability
 - Price, cheaper than wild seafood
 - Participate in the wild resource conservation

A few negative attributes

- Stressfull environment for the fish
- Use of colorants and chemicals may be excessive
- Use of antibiotics

How similar are the markets?

- Dependence upon external supplies
 - Europe total imports 30 billion €
- Growing importance of aquaculture products
 - In volume and %
 - Same species/ *pink wave*
- Growing importance of large scale players
 - supermarkets, catering

Spain and farmed seafood

- 2 300 000 tonnes total seafood
- >500 000 tonnes farmed seafood
 - Of all finfish, 10% farmed finfish
 - Of all shellfish 45% farmed
- Main farmed species: mussels, shrimps, salmon, pangasius, seabass, seabream, turbot



Italy and farmed seafood

- 1 700 000 tonnes of seafood
- > 400 000 tonnes farmed seafood
 - Of all finfish 15% farmed
 - Of all shellfish 40% farmed
- Main farmed species: carpet shells, shrimps, mussels, salmon, pangasius, seabass, seabream





France one of Europe largest market for seafood



- 2,2 million tonnes
 - 500 000 tonne domestic production
 - 1 500 000 tonnes imported
- Third largest seafood processing industry
 - 650 enterprises, 15 000 pers. employed, behind Spain/ UK



France: Aquaculture *versus* wild

2,2 million tonnes


Wild
1,6 million

Aquaculture
0,6 million

Finfish 1,3
Shellfish 0,3

Finfish 0,2
Shellfish 0,4

Top five aquaculture species



Mussels
190 000 tonnes
95% farmed



Salmon
180 000 tonnes
98% farmed



Trout
35 000 tonnes
100% farmed





Shrimps
130 000 tonnes
70% farmed



Oysters
80 000 tonnes
100% farmed





Finfish

Seabass 10 000 tonnes 50% farmed

Pangasius 20 000 tonnes 100% farmed



Market Challenges Specific to Aquaculture

- Future demand?
 - Population growth
 - Economic situation
 - Other sources of proteins
- Image of products and industry?
 - Communication & Promotion

Market Challenges Specific to aquaculture

- Large scale players' requirements
 - Volumes, quality, prices, attributes (social, environmental, etc.)
- Consumers' satisfaction
 - Quality, taste, convenience
- Health safety
- Environmental impact

Enjoy your stay in Paris

Marie Christine Monfort



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