

The mussels market in France : Products, operators and development

September 2018

**PRESENTATION OF THE STUDY
AND FREE EXCERPT**



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Products, operators and development

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Scope of the study, methods, report contents

The mussels market in France

Global and European mussel productions and their main characteristics were studied before focusing on the main European markets, particularly the market in France. France is the largest European importer of mussels, both live mussels from other European countries and shelled and frozen mussels from Chile and New Zealand. After a detailed analysis of the flow of mussels in France through figures concerning imports/exports, production and consumption, a qualitative and quantitative presentation on today's mussel consumers has been prepared. Also, the products available to consumers during the summer of 2018 are presented (live, fresh delicatessen, tinned, frozen). In total, 208 products were identified on the shelves of 12 major French supermarkets and are listed by category with their main characteristics specified (weight, price, processing, country, label, etc.) and presented individually with photos.

The main players on the European market are Spain, France, Italy and the Netherlands. Mussels are Europe's main farmed product, representing nearly 1/3 of the aquaculture products on the market. European production has slightly fallen off while consumption has increased. This imbalance has resulted in a major increase in mussel imports from outside Europe, particularly shelled mussels from Chile. France is the main European importer for both live mussels from Spain and prepared mussels. The majority of mussel consumption by the French occurs at home. Mussel consumption in France remains high and stable thanks to the excellent image this popular product has with consumers. For a consumer shopping at the supermarket, mussels can be found in different sections and in many different forms. European mussels are found at the seafood counter alive (sold loose or in containers) or precooked in the store aisles. Virtually all mussels used in prepared products are imported mussels, both in fresh tapas/fish product aisles and the tinned or frozen foods aisles.

VIA AQUA

VIA AQUA is a firm of experts in seafood, specialising in sector marketing to assist companies and players focusing on the consumer market in France and in other major European countries.

Its mission is to conduct studies and support projects to:

- Create and implement an effective market entry for products at each link in the chain,
- Identify and use new opportunities in development, innovation, competitive advantages and distinctions upstream and downstream for each company,
- Unlock growth potential with maximum security in relation to real market expectations
- Optimise and streamline organisation, resources, strategies, positioning, partnerships and communication
- Develop forward-looking visions and anticipate changes.



VIA AQUA's operations and efforts focus on the market, the product and its competitiveness, the company's organisation and strategy, the partnerships in the sector as well as outside relationships:

- Innovation, diversification: creativity, studies, support, organisation or a complete strategy,
- Sales, marketing : audits, strategic plan, market studies, communication, sales strategy, recruitment, support, organisation,
- Studies: sector studies (surveys, barometers, trend analyses, etc.), consumer studies, market studies, prospective studies,
- Sectoral policies: support with definitions, implementation, assistance to companies, studies and forward-looking strategies.

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List of companies mentioned

ALIMENTOS JAVIMAR	LES PLAISIRS DU MIDI
ANGULAS AGUINAGA BURGOS	L'ESCARGOT COUBEYRE
AZAÏS POLITO	LOPEZ FREIRE
CAMANCHACA CULTIVOS	MAISON BRIAU
CELTIGEL	MAREDOC
CONEGAN	MARIE SURGELES
CONSERVAS CERQUEIRA	MEDITHAU
CONSERVAS SELECTAS DE GALICIA	MEJILLONES NIDAL
COSTA	MITI
CULTIMER SAS	MORUBEL
DELTAMOSSEL	MYTILEA SARL
DISTRIMERS	MYTILIMER
EARL PHILIPPE THURMEL	NUDISCO
EDERKI	PACKGEL
ESCAL	PACKINGEL
ETS BERNADET	PACKOPALE
FRIAL	PÊCHERIES BASQUES
FRINSA DEL NOROESTE SA	PECHERIES OCCITANES
GELAGRI BRETAGNE	PÊCHEUR DE SAVEURS
GLOBALINNOVA EUROPA SL	PICARD SURGELES
GROUPE FRANCAISE DE GASTRONOMIE	PROMAREE SURGEL
GRUPO LINAMAR	ROEM VAN YERSEKE
ITTICA VILLAREGIA	ROLLMER
JP ZEEUWSCHE BANIER B.V.	SAS ATHANAS
KERMARÉE	ST. ANDREWS SMOKY DELICACIES
KLAAS PUUL BV	TIPIAK
KRIJN VERWIJS	TULIP FOOD COMPAGNY
LE DELIZIE ITALIANE S.R.L.	VETTE & VERHAART B.V
LE GRAND LEJON	
AUCHAN	LEADER PRICE
CARREFOUR	LECLERC
CASINO	LIDL
CORA	MONOPRIX
GRAND FRAIS	PICARD
INTERMARCHÉ	SYSTÈME U

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Excerpt from the analysis

Introduction

The world's production of mussels has been rapidly growing since the middle of the 1970s and reached 2 million tons in 2016 (6 major species¹). The rise in production is uniquely due to aquaculture developments, with fishing in a somewhat declining trend. Since the 2000s, the price of mussels has quadrupled (figure 1).

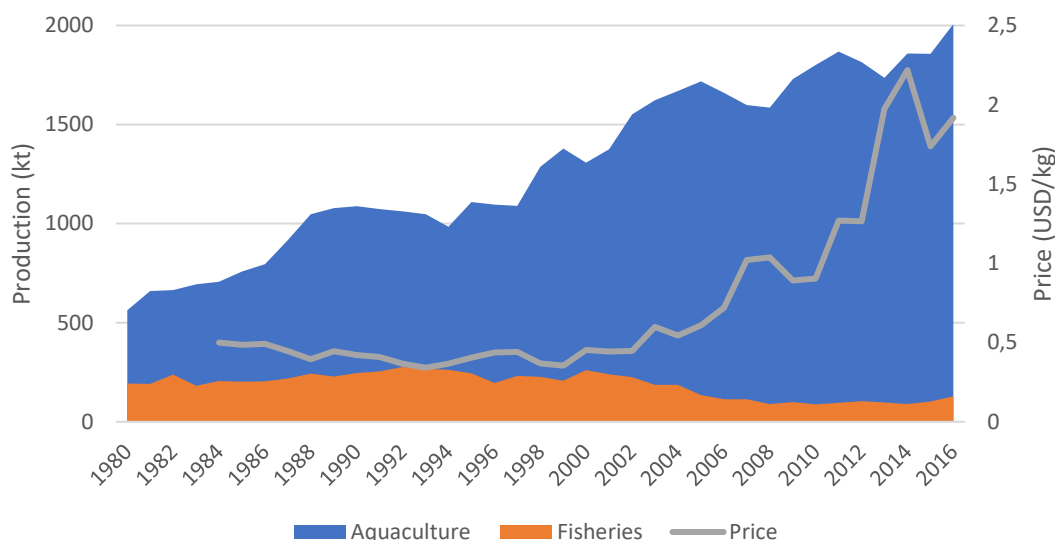


Figure 1: Development of world mussel production (Source: Via Aqua according to FAO Fishstat, 2018)

The world's leading mussel producers are China, Chile and Europe.

Top 10	Production (kt)
China	879
Chile	302
Spain	216
Thailand	115
New Zealand	94
Italy	64
France	57
Korea	55
Netherlands	54
EUROPE	479

Figure 2 : Ranking of the world's top 10 mussel producers (Source: Via Aqua according to FAO Fishstat, 2018)

¹ *Mytilus chilensis*, *Mytilus edulis*, *Perna viridis*, *Mytilus galloprovincialis*, *Perna canaliculus*, *Mytilus coruscus*

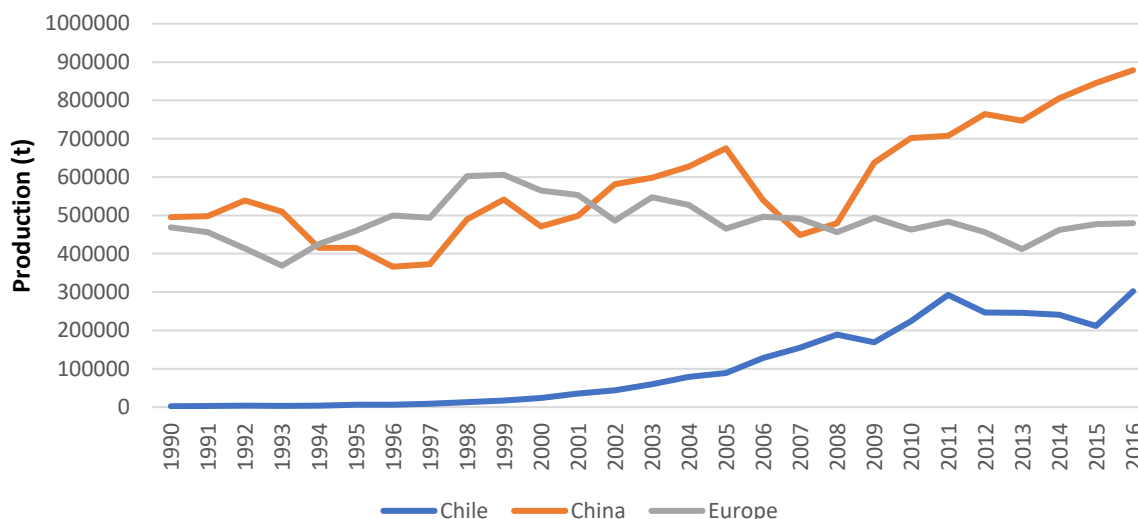


Figure 3 : Development of aquaculture production by the top 3 mussel producers (Source: Via Aqua according to FAO Fishstat, 2018)

While China and Europe have been long-time producers, mussel farming in Chile started to develop in the 2000s. Production in China continues to grow while European production stagnates and has even seen a slight decline in comparison to the 2000s.

1. Mussels in the European Union

1.1 Production

Two species of mussels are produced in Europe:

- *Mytilus edulis*, also called the blue mussel. This species is mainly farmed and/or fished in the north of Europe, the Atlantic, the English Channel and the North Sea. It is this species that is grown on "bouchots" (poles) in France.

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Discover more information in the full report:

- 31 pages + 41 pages of appendix
- Photo library of the 208 products
- Detailed Excel file of the 208 products

Excerpt from the appendices

Appendix 2: List of mussels at the self-service seafood counter

Shop	Brand	Species	Origin	Processor	Processing place	Certification	€/kg	Picture
Auchan	Médithau	galloprovincialis	France	Médithau	France - 34340 Marseillan	MR Goodfish	3.57	
Carrefour	Filière qualité Carrefour	edulis	France - Baie du Mont Saint Michel	Mytilimer	France - 35260 Cancalle	AOP Moules de bouchots de la Baie du Mont Saint- Michel	5.64	
Cora	Cora	edulis	France	Mytilimer	France - 35260 Cancalle	STG Moules de bouchot	5.86	
Géant Casino	Casino Terre & Saveur	edulis	France	Cultimer SAS	France - 35120 Dol de Bretagne	STG Moules de bouchot	5.41	
Grand Frais	-	galloprovincialis	Espagne - Galice	Grupo Linamar	Espagne - 36630 Cambados	-	2.79	
Intermarché	BIO	galloprovincialis	Espagne	MEDITHAU	France - FRONTIGNAN	AB bio FR BIO 10	4.99	
....

Excerpt from Excel file

Date	Shop	Preservation	Shelf	Product	Brand	Live/ Cooked / Shucked	% mussel	Wild/Farmed	Species	Origin of mussels	Processor	Processing place	Processor number	Distribute d by...	Certification	Packaging	Weight pack (g)	Price pack (€)	€/kg	-	Picture N°
July 2018	Carrefour	Fresh	Self-service seafood counters	Live mussels	Marédoc	Live	100%	Farmed	galloprovincialis	Spain - Arousa	Maredoc	France - 34140 Bouzigues	FR 34 108 530 CE	-	Organic	Transparent container	1400	6.9	4.93	Ready to cook	Carrefour 8
July 2018	Géant Casino	Frozen	Frozen food section	Tapas - Mediterranean mussels	Costa	Shucked meat	39%	Wild	edulis	Western Baltic Sea	Costa Sea Specialties GmbH & Co. KG	Germany - Emden	DE NI - 11076 EG	-	-	Cardboard box	240	6.35	26.46	NEW	Casino 15
July 2018	Leclerc	Frozen	Frozen food section	Mixed seafood cocktail	Eco +	Shucked meat	-	Farmed	chilensis	Chile	Frial	France - 14401 Bayeux	FR 14 047 031 CE	Scamark, France, 94859 Vitry sur Seine	-	Plastic bag	500	3.5	7.00	-	Leclerc 14
August 2018	Intermarché	Fresh	Fresh delicatessen products	Catalan-style mussels	Odysée	Shucked meat	48%	Wild	edulis	North East Atlantic	JP Zeeuwsche Banier B.V.	Netherlands - 4401 Yerseke	NL 6025 EG	-	-	Glass jar	200	2.44	12.20	Intermarché selection	ITM 9
August 2018	Super U	Frozen	Frozen food section	Marinière-style mussels	U	Shucked meat	85%	-	chilensis	Pacific Ocean	Frial	France - SAINTMARTIN-DES-PRES	FR 14 630 043	-	-	Plastic bag	400	3.59	8.98	Cooked in France	SU 9
August 2018	Auchan	Ambient temperature	Canned seafood	"Escabèche" style mussels	Pay Pay	Shucked meat	-	-	-	-	Conservas Cerqueira	Spain	ES 12.00586/C CE	-	-	Tin and cardboard box	115	1.89	16.43	-	Auchan 7
Sept. 2018	Grand Frais	Fresh	Self-service seafood counters	Rope-grown mussels	-	Live	100%	Farmed	galloprovincialis	Spain - Galice	Grupo Linamar	Spain - 36630 Cambados	ES 12 13222/PO CE	Grand Frais	-	Transparent container	1000	3.50	3.50	-	GF 3
Oct. 2018	Cora	Frozen	Frozen food section	Marinière-style mussels	Cora	Shucked meat	85%	-	chilensis	-	Frial SAS	France - 14400 St Martin des Entrées	FR 14 630 043 CE	Cora France - 77435 Marne la Vallée	-	Plastic bag	400	3.69	9.23	-	Cora 12
....