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Paquotte P. (ed.), Mariojouis C. (ed.), Young J. (ed.).
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Zaragoza : CIHEAM
Cahiers Options Méditerranéennes; n. 59

2002
pages 83-86

Article available on line / Article disponible en ligne à l'adresse :

<http://om.ciheam.org/article.php?IDPDF=2600083>

To cite this article / Pour citer cet article

Vilaine R. **The foodservice market's interest in aquaculture products: The example of France.**
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The foodservice market's interest in aquaculture products: The example of France

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SUMMARY – For several reasons, aquaculture is a promising sector in the foodservice market. Foodservice is a growing market, seafood consumption is increasing and aquaculture has big advantages for foodservice operators: good image, product versatility, stability of supply, quality control.

Key words: Seafood, restaurant, aquaculture.

RESUME – "L'intérêt du marché de la restauration pour les produits aquacoles : L'Exemple de la France". L'aquaculture est un secteur qui a un réel potentiel dans le marché de la restauration hors foyer pour plusieurs raisons. A l'intérieur du secteur de la restauration qui est en croissance, la consommation de produits aquatiques augmente et l'aquaculture présente de grands avantages pour les opérateurs de la restauration hors foyer : bonne image, gamme de produits et adaptabilité de la matière première, offre stable et contrôle de la qualité.

Mots-clés : Produits de la mer, restaurant, aquaculture.

Introduction

For several reasons, aquaculture is a promising sector in the foodservice market. Based on the French case, this paper describes the following ten reasons: (i) foodservice is a growing market; (ii) it still has strong potential ; (iii) foodservice takes a big share of the French seafood market; (iv) seafood has big advantages for foodservice operators; (v) a product which is winning market share; (vi) a product which competes well with meat products; (vii) a strong trend towards seafood products with high added value; (viii) aquaculture products already have a good share of foodservice purchases; (ix) aquaculture products can overcome many constraints in the foodservice market; and (x) aquaculture products can be easily adapted to the demands of the foodservice market.

Foodservice is a growing market

The share of "out-of-home" meals in total meals in France increased from 7% in 1960 to 11% in 1980, and 15% in 2000.

In France, foodservice still has strong potential

"Out-of-home" meals are not as important in France as in many other countries: France 15%, Europe 17%, Canada 25%, Japan 30% and USA 35%.

Foodservice accounts for a significant share of the French seafood market

For an average meal, the consumption of seafood is twice more important out of home than at home. Indeed, only 15% of the meals are "out-of-home" meals, while 30% of the consumption of seafood occurs out of the home (Fig. 1).

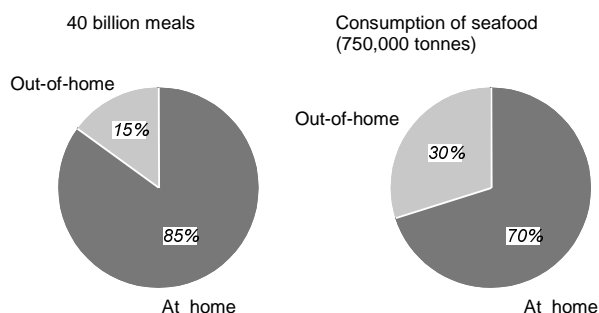


Fig. 1. Foodservice takes a big share of the French seafood market.

Seafood has big advantages for foodservice operators

As far as foodservice operators are concerned, seafood has many qualities. It is a product with a healthy, natural image. It fits the new trends in out-of-home eating habits, it is adapted to all types of customers, it is suitable for all types of foodservice outlets and allows differentiation in the composition of the menu.

Conversely, households are often reluctant to purchase seafood because it is difficult to get hold of the product, to store it, to prepare and cook it. There is a drop in the level of cooking skills and a limited knowledge of the supply.

Seafood is gaining market share

The protein content of meals in the French foodservice market has changed between 1980 and 2000 (Fig. 2).

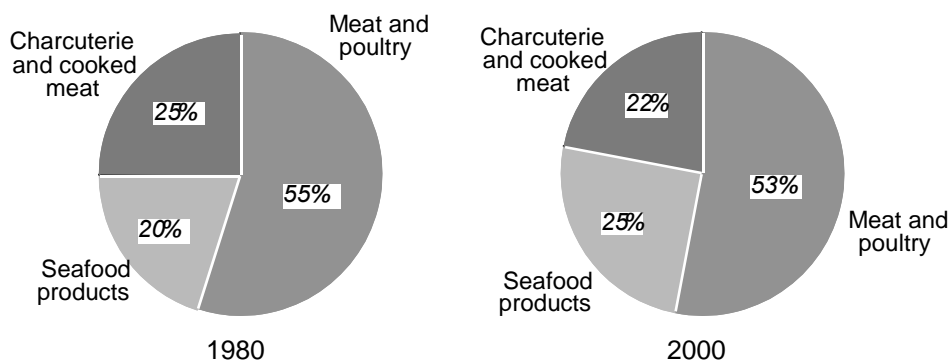


Fig. 2. Breakdown of the protein content of meals in the French foodservice market.

A product which competes well with meat products

A product that conveys a positive image

Unlike meat, in general, seafood does not suffer from the image of intensive farming, it has a natural image and its price competitiveness has been growing for several years.

A product with many advantages

It is a product which is rapidly cooked, easy to manage and present, very versatile, and its temperature is easy to keep under control.

A transversal product

It may be positioned in many meal components. It has a relatively neutral taste, which can be easily enhanced. It is also well adapted to budgetary constraints of different income groups.

A strong trend towards high added-value seafood products

The share of processed products in "out-of-home" consumption is increasing, and seafood is available under many convenient forms. At present, 50% of the seafood purchased by restaurants is chilled, while 45% is frozen and 5% canned.

Aquaculture products already have a good share of foodservice purchases

Total seafood purchased by restaurants reached 130,000 tonnes in 1998. Fish farming market share is 23% (18% for salmon, 4% for trout, 1% for other fish). Including oysters, mussels, scallops and tropical shrimps, this share amounts to 27% (Fig. 3).

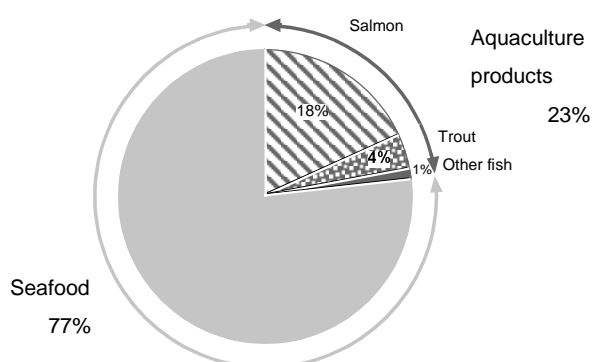


Fig. 3. Volume of seafood purchased by foodservice.

Aquaculture products can overcome many constraints in the foodservice market

Cost constraints

There is a price differential in favour of aquaculture products and the prices of aquaculture products are more stable, resulting in a better control of food costs.

Supply constraints

Aquaculture products are constantly available and there is a better control of the supply chain.

Quality constraints

The quality of aquaculture products is constant, as well as the size of the portions. Aquaculture makes it possible to offer a wide range of products for all types of outlets.

Aquaculture products can be easily adapted to the demands of the foodservice market

There is a wide range of reliable information regarding how aquaculture products are farmed.

These products can be easily adapted to the operating manuals of large foodservice groups. They can be adapted to the requirements of different foodservice segments. There is also an efficient distribution chain which underlines the notion of freshness of aquaculture.

In conclusion, aquaculture is a product with a real future in the foodservice market.