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Market Penetration of Developing Country Seafood Products in European Retail Chains

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Survey of Selected Stores in France and Italy

by

Gerry O'Sullivan
Jamila Bengoumi

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Food and Agriculture Organization of the United Nations, GLOBEFISH, Fish Products and Industry Division
Viale delle Terme di Caracalla, 00153Rome, Italy – Tel.: (39) 06570 56313
E-mail: GLOBEFISH@fao.org - Fax: (39) 0657055188 – http//:www.globefish.org

Gerry O'Sullivan Jamila Bengoumi.;
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The past twenty to thirty years has seen the emergence of retail chains as the dominant distributors of food in developed countries. The apparent power of retail chains in global food distribution raises questions regarding the implications of seafood producers in developing countries. The present report outlines the results of a survey of almost seventy retail outlets in two key European seafood markets, France and Italy. The survey focused on the presence of seafood products from developing countries in these outlets.

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1. INTRODUCTION

Globally, the retail food sector has undergone a process of significant change over the past twenty to thirty years. While the process has varied from country to country, common trends include:

- the increasing share of retail sales which are accounted for by national or regional chains
- corresponding to this increase, a decline in the traditional role of small independent grocers and independent wholesalers
- the internationalization of retail chains
- increased concentration of buying power in the retail chains
- increased influence of retail chains in agro-industry development (standard setting, new product development etc)

Worldwide, the seafood industry has been, and continues to be, affected by these changes. Evolving distribution structures have meant more direct links between retail chains and producers and, although poorly documented, the wholesale function as a link between seafood producers and retailers appears to be increasingly eclipsed by this direct link. Similarly, intense competition between retail chains has meant increased pressure on producers in the area of productivity, prices, quality and new product development. In addition, the increasingly dominant role of a relatively small number of chains in many national markets has given these chains an increasing influence in terms of the adoption of product standards including those related to food safety, quality, environmental issues, social issues, animal health and welfare.

The various changes taking place in food distribution generally, and in seafood distribution in particular, have raised questions regarding the impact of these changes on producers in developing countries. The changes can be seen to impact producers in two broad areas: within the producer's domestic market and in terms of access to export markets.

Regarding the former area, retail chains have been expanding their presence in developing countries for a number of years and the increasing share of domestic retail markets accounted for by the chains is relatively well documented. Research has also been conducted on the consequences of this trend for local food producers, although with limited focus on the seafood sector. Trends noted in the agricultural sector in developing countries include the development of new procurement systems with retailers reducing purchases through wholesale structures. There has also been an increasing focus by retail chains on food safety and traceability which has had implications for producers and suppliers.

In terms of the latter area, producers' access to foreign markets has also been affected by the increasing importance of retail chains in the main export markets in developed countries. Traditional structures such as the importer-wholesaler-retailer pattern have evolved as retail chains have increasingly opted for direct relations with producers in the main seafood producing countries including those in developing countries. Research on the implications of retail chain growth for seafood exporters in developing countries is, however, limited.

At the same time, the issue of concentrated retail power in developed countries raises various questions in relation to developing country exporters:

- How is market access affected?
- Are there implications for value addition strategies for exporters?
- What are the strategic implications for exporters in terms of branding, pricing, logistics?
- Are there implications in terms of industry concentration in developing countries and are there size implications for exporters?

While answers to these questions require research which is beyond the scope of the present report, the report aims to provide some broad indications regarding the potential for processed seafood products from developing countries (**DC**) with leading European retail chains. The report is based on a survey of retail stores in two key European seafood markets, France and Italy.

The survey aimed to determine:

- The extent of the penetration of DC products in the stores surveyed in France and Italy
- The main DC countries supplying products to the chains
- The main product groups
- The extent of value addition of the products surveyed
- The import structure for DC products
- The distribution structure for DC products by retail format
- The branding pattern for DC products

The results of the survey provide preliminary information on the penetration of DC products in the product ranges of a number of key European retail chains. They also provide indications on the main product categories (tuna, anchovies, shrimp etc) and presentation types (canned, frozen etc) from developing countries which are marketed on the shelves of these chains. They also provide information on the issue of branding for DC products sold to the large chains. It is hoped that the report will provide some guidance to exporters in DC's regarding sales potential and marketing strategy with respect to major European retailers.

The structure of the report covers ten chapters. Following the introduction, executive summary and methodology (chapters one to three), the fourth and fifth chapters provide a context for the results and include an overview of the retail sectors in both France and Italy followed by a description of the seafood import requirements of both countries. Chapters six, seven, eight and nine provide the detailed results for the individual countries as well as a comparative analysis of the results for the two countries and a discussion on specific retail issues based on the results. The report concludes with a discussion on the implications of the results for exporters in developing countries.

2. EXECUTIVE SUMMARY

The past twenty to thirty years has seen the emergence of retail chains as the dominant distributors of food in developed countries. The process has also been taking place in developing countries as many of the large US or European chains have expanded their activities into many fast growing economies in Asia, Latin America and Africa. The apparent power of retail chains in global food distribution raises questions regarding the implications for food producers in developing countries. These implications concern producers both in their domestic markets as well as in export markets. Although some research has been conducted into this topic in various food sectors, the area remains poorly documented for the seafood industry.

The present report outlines the results of a survey of almost seventy retail outlets in two key European seafood markets, France and Italy. The survey focused on the presence of seafood products from DC's in these outlets. The survey aimed to determine the extent to which DC products were present in selected European retail chains and to provide some initial indications regarding issues such as product categories, distribution structures and branding. It is hoped that the survey will provide a perspective on retail chain activities in the two countries for potential seafood exporters in developing countries.

The survey, which covered the main retail formats, was conducted during 2006 (with a number of second visits taking place during 2007) in four urban centres: Paris and Marseilles for France and Rome and Milan for Italy. An effort was made to cover the main retail chains although this was more difficult in Italy where the retail structure is more fragmented than in France. The survey focused on branded products, excluding loose unbranded products, the origin of which is often difficult to determine. Several thousand products were checked and those of DC origins were noted with details on country of origin and product specifications such as contents, size and brand.

A total of 596 DC products was noted during the survey. This figure includes products from the same company which were identical except for the brand. For example, two identical products sold by a company, one under the company's own brand and the other under a retail brand, were counted as two products. Similarly, identical products (specifications, brand etc) from the same producer but manufactured in two different countries were also counted as two products. In addition, many DC companies supplied a range of different products in terms of pack size, ingredients (for example sardines in oil or tomato sauce). For these reasons, the number of DC companies concerned was significantly less than the number (596) of products noted.

No attempt was made to note total number of branded seafood products in the outlets surveyed. However, the 596 DC products noted probably account for less than ten percent of the total number of seafood products stocked in the stores. This share is, however, likely to vary significantly according to the product segment with a higher share for preserved products (particularly in product categories such as anchovies and sardines) and a lower share for frozen, but particularly for chilled, products.

Of the 595 DC products noted, around two thirds were in the preserved segment while frozen products made up much of the balance, chilled products (essentially smoked) accounting for less than 3% of the total. The result for chilled products is not surprising given the distance between many developing countries and the two European markets.

In line with the relatively strong representation of preserved products in the survey, product categories such as tuna, anchovies and sardines, accounted for a significant proportion of the products surveyed. The importance of the latter two categories meant that Morocco was the top supplying DC in the survey in terms of the number of products surveyed. On the other hand, Thailand was the top DC in terms of category range. In other words, a relatively large number of products of Moroccan origin were identified but these products covered a limited number of product categories (essentially sardines and anchovies). Although fewer products of Thai origin were identified, these products covered a relatively large number of product categories (tuna, shrimp, cephalopods etc)

The largest product category in the frozen segment was shrimp. It is worth noting, however, that many frozen shrimp products on sale in retail outlets with Asia or Latin America as production origin were not counted as DC products for the purposes of the survey as they were based on bulk shrimp imported from developing countries which was repacked or re-processed in EU countries. In this case the retail shrimp packs contained EU factory numbers.

In general, DC products are marketed in French and Italian retail chains under brands of companies based in EU countries. It is possible to broadly classify these companies into four groups: multinationals, EU producers, EU importers and retailers. In France, retailer brands accounted for the biggest group of DC products at over a third, while in Italy, EU (essentially Italian) producers or importers accounted for the greater share, almost two thirds, of DC products surveyed. The larger multinational companies, mainly in the tuna category, accounted for a relatively small number of products (less than 10%) in both France and Italy although it is highly probable that these products were much more important in terms of sales (an issue outside the scope of the survey).

The share of products surveyed which were marketed under DC brands varied between the two countries with 19% of products in France and 7% in Italy. The French figure would have been significantly reduced if just two companies were excluded. Both companies (one based in Morocco, the other in Thailand) now own (or partly own) brands which were originally developed in the French market. The two companies also appear to own, or are in partnership with, the original sales and marketing structures which originally developed the brands. Leaving aside both companies, the number of products which are marketed under DC brands is less than 10% in the two markets. This figure is not surprising given both the cost of creating and developing a brand and the general trend towards retailer brands in European markets.

A number of broad conclusions and strategy implications for DC exporters are suggested by the survey results:

- DC exporters are absent from key growth segments in French and Italian markets such as the prepacked chilled segment. The development of new chilled packaging techniques (such as vacuum packaging) which effectively extend product shelf life may help address this deficiency.
- DC products also remain largely absent from the value added segment such as prepared meals and remain largely cost and price oriented with limited value addition.
- DC brands are under represented in the French and Italian markets in that most of the DC products identified were sold under brands of companies (importers, retailers, producers) based in these markets. For many DC exporters, particularly small and medium sized, this approach in supplying a market under a domestic brand may, however, be the most cost effective.
- Entry into the French market may be facilitated by supplying under retailer brands while supplying under local producers' or importers' brands may be a more appropriate option for the Italian market.
- While research limitations meant that it was difficult to identify key retail chains as appropriate partners for DC exporters, the survey results suggested that the big international hypermarket chains such as Carrefour, the Metro cash & carry chain and the international discount chains such as Lidl and Aldi, may be more open to approaches from DC companies than the more domestic market oriented chains such as System U in France or the many regional Italian chains.

3. METHODOLOGY

The present report is based mainly on information collected from retail store surveys. The information was supplemented by a limited number of company interviews and, for the overview sections, by desk research. The information was collected over the 2006 – 2007 period.

3.1. **Retail survey: stores**

A sample of retail stores was surveyed in France and Italy to collect information on the presence of seafood products from developing countries. In total 23 stores were visited in France and 44 in Italy. In both countries, stores were surveyed in the two main urban centres: Paris (14 stores), Marseilles (9 stores), Rome (33 stores) and Milan (11 stores).

The selection of stores surveyed was designed to cover as far as possible the main format types: hypermarkets (floor area of at least 2 500 m²), supermarkets, convenience stores and discount outlets (see appendix 1 for format definitions). An effort was also made to cover the main retail chains in the four cities visited.

In France, retail formats were surveyed as follows:

Hypermarkets	9 stores
Supermarkets	7 stores
Convenience Stores	2 stores
Discount Stores	5 stores
Total	**23 stores**

In Italy, a greater range of formats was surveyed:

Hypermarkets	11 stores
Supermarkets	13 stores
Convenience Stores	10 stores
Discount Stores	9 stores
Freezer Centres	1 store
Cash & Carry	1 store
Total	**44 stores**

An effort was made to include the main retail chains in each country. In France, the twenty three stores were surveyed consisted of the following chains and banners:

Chain (stores surveyed)	**Banners**
Aldi (1 store)	Aldi
Auchan (3 stores)	Auchan, Atac
Carrefour (5 stores)	Carrefour, Champion, Ed, 8 à huit
Casino (8 stores)	Géant, Casino, Monoprix, Franprix, Leader Price
Cora (1 store)	Cora
Intermarché (1 store)	Intermarché
Leclerc (2 stores)	Leclerc
Lidl (1 store)	Lidl
System U (1 store)	Super U

As discussed in more detail in chapter 4 below, individual chains will often consist of different format types operating under different banners (the name or brand of the individual store). Carrefour, France's largest retail chain, sells its products under the following banners (format in brackets): *Carrefour* (hypermarkets), *Champion* (supermarkets), *8 à huit* (convenience stores) and *Ed* (discount stores). Similarly, the Casino chain uses several banners: *Géant* (hypermarkets), *Casino* and *Monoprix* (supermarkets), *Franprix* (convenience stores) and *Leader Price* (discount stores). For the store surveys, an effort was made to cover both as wide a range of banners as possible.

In Italy, the 44 stores which were surveyed covered the following chains and banners:

Chain (stores surveyed)	**Banners**
Auchan (six stores)	Auchan, SMA, Cityper, Simply
Carrefour (five stores)	Carrefour, GS, Di per Di
Ce Di Gros (one store)	SIR
Conad (five stores)	Conad
Coop Italia (three stores)	Ipercoop, Coop
Eurospin (2 stores)	Eurospin
Esselunga (2 stores)	Esselunga
Gruppo Pam (4 stores)	Panorama, IN's, Metà
Gruppo Tuo / Despar (4 stores)	Despar, Tuo
Il Gigante (1 store)	Gigante
Lidl (1 store)	Lidl
Metro (1 store)	Metro
Ocean (1 store)	Ocean
Rewe Group (3 stores)	Standa, Penny Market
Sidis (1 store)	Ipersidis
Sisa (1 store)	Sisa
Superdi (1 store)	Superdi
Todis (1 store)	Todis
Unes (1 store)	U!

It is difficult to estimate accurately the percentage of total retail chain grocery sales in each country which the chains surveyed account for. However, it is likely to be in excess of 80% in France and over 65% in Italy. The more fragmented structure of the Italian retail chain sector, in which regional or local groups are more in evidence than in France, accounts for the lower percentage figure in Italy. Key chains which were not surveyed include the Picard freezer centre chain in France and Finiper, Bennet as well as chains participating in the Selex buying group in Italy.

The surveys took place during 2006 with second visits to a number of stores taking place during 2007.

3.2. **Retail survey: products**

In each store visited, all seafood products were surveyed in the four main product groupings: canned/preserved; frozen; chilled prepacked and chilled unpacked. Where possible the product origin was determined and, for each item originating in a developing country, details such as country of origin, brand, producer, distributor, product description, species group and weight were noted.

This approach presented difficulties in relation to the chilled unpacked or 'loose' segment. In general, it was difficult to determine the origin for many of the fish products in this segment, particularly those having a value added component (such as fillets). Although origin details are obligatory in the segment, the information is generally provided in relation to the first point of production (country or fishing area) rather than the area where any value added took place. The problem is illustrated in the case of loose cooked chilled shrimps in France in section 8.2 below. Another problem with this segment is that product origin, despite the legal obligation, is sometimes not provided, or is unclear, in the store.

Because of the problems relating to origin in the chilled unpacked segment, the results presented in the present report focus on prepacked products in the preserved/canned, frozen and chilled segments. Many stores that were surveyed, notably most convenience and discount stores, did not, in any case, have fresh fish counters but only sold prepacked products.

All prepacked seafood products were surveyed in the sixty seven stores visited. Observations were made on several thousand seafood products in all although product details were noted only regarding those products packed in developing countries. Details were not therefore noted regarding products with raw material originating in developing countries but packed in West European (or other developed) countries.

In a number of cases, two otherwise identical products from a developing country were noted with different brands. For the purposes of the survey, these were treated as two separate DC products. Similarly, in other cases, two otherwise identical products had a different country of origin (i.e. the manufacturer was producing the same product in different plants). These two products were also treated as two separate products.

The store surveys (following the above conventions) yielded a total of 596 DC products, 324 from French stores and 272 from Italian stores. An important qualification regarding these results is that they do not take account of sales and therefore do not give an indication of the significance of DC products in seafood sales for retail chains. For example, a popular canned tuna product from a developing country may generate sales exceeding the combined sales from a dozen niche products manufactured in the domestic market.

3.3. **Company Interviews**

A small number of companies (importers and retailers) were contacted to obtain a general impression on the possibilities for exporters in developing countries to supply the retail sector. Information provided by these companies helped to clarify some issues relevant to the research.

4. RETAIL OVERVIEW

4.1. **Europe**

The past 25 years have seen a steady evolution in retail food distribution structures in both developed and developing countries. During this period, self service retail chains have emerged as the dominant retail structure for food distribution in developed countries and in most developing countries. The rise of the chains stores has generally been at the expense of small independent grocers who have tended either to close altogether or to join voluntary retail groupings based on cooperative or franchise type structures.

The process of change over the 25 year period has also affected the type of retail outlet, or store format, in all markets. The range of retail formats now includes supermarkets, hypermarkets, discount outlets, convenience stores and freezer centres (see appendix 1). Individual retail chains will often include several format types within their overall structure.

Europe has been at the centre of many of the changes which have characterized the retail sector throughout the world in recent years. This is particularly true in terms of retail globalization which has seen Europe's major chains expand operations into many overseas markets both in developed and developing countries - Carrefour, Europe's largest grocery retailer, operates stores in almost thirty countries. At the same time, developments in Europe's grocery sector have not progressed evenly between countries. A small number of countries, notably France, the UK and Germany, may be considered as pioneers regarding certain retail innovations which have subsequently been exported to other European countries. In contrast, other countries such as Spain and Italy adopted modern retail structures at a somewhat later stage.

France has been a leader in Europe in developing the hypermarket concept following the opening of the first store by Carrefour there in 1960. Similarly, Germany is generally regarded as the leader in the discount format reflecting the success of domestic groups such as Aldi and Lidl. In the UK, several chains such as Tesco and Marks & Spencer are seen as leaders in consumer service including the development of value added food products which are marketed under the stores' own brands.

Partly on foot of success in their respective domestic markets, retail chains in the three countries have expanded into other European and non-European countries where local structures were slower to embrace more modern retail forms. In Western Europe, Carrefour and fellow French rival, Auchan, now have, for example, significant shares in both the Italian and Spanish retail markets. Likewise, Aldi and Lidl have expanded their discount format into other European countries including the more 'developed' retail markets such as France and the UK.

In Europe, the recent evolution in grocery retailing has included both the emergence of new chains and a process of expansion and consolidation for existing chains. This latter process has resulted in large corporate structures which are now significant not only in terms of buying power vis-à-vis suppliers but also in terms of general economic power. France's Carrefour, the largest European retailer and the second largest in the world, has annual sales of €97 billion while Tesco, the UK's top grocery chain achieved sales in 2006 of almost £47 billion. The chain is the largest private sector employer in the UK.

The increasing size and economic power of individual chains has prompted the expansion of retailer activities into areas outside of the more traditional retailer role. These new activities have tended to be a response to 1) a need to control related activities or 2) a desire to exploit the strong market and economic position of an individual retailer.

Increased control of related activities includes the expansion of the buying function to cover import activities. Many retailers are now more likely to buy directly from foreign producers, particularly in the case of regular large scale purchases, and to bypass traditional importers. Direct contact with producers has been a hallmark of the retail chain approach. From the beginning, this relationship allowed chains to bypass wholesalers and to compete with a strong price advantage against traditional independent retailers. Some retailers, such as Intermarché in France, have gone a step further and integrated backwards into production but this option is unusual and retailer chains have, in general, been content to maximize their buying position vis-à-vis large producers whether operating domestically or abroad.

Exploitation of retailers' economic power includes the gradual switch by retailer chains from producers' brands to private labels. Private labels are attractive to retailers because they allow a retailer to undercut prices for similar branded products and so improve their competitive position vis-à-vis other retailers. Typically (but not always), prices for private labels are lower due to lower quality specifications which a retailer agrees with a producer. Private labels are also attractive because they allow retailers to appropriate, at least part of, the margin normally generated by a brand.

The increased economic power of retail chains has also allowed them to play a greater role in setting food standards within the overall supply chain. Although traditionally the domain of governments, food standards have become important to retail chains following various food alerts and subsequent adverse publicity. The chains' interest in standards is not confined to safety and quality issues but increasingly to more social / consumer issues such as sustainability.

Table 1 European Sales* of Leading Retail Chains 2006

Group (HQ Country)	**Sales (€ billion)**
Carrefour (France)	65.9 e
Tesco (UK)	55.7
Metro** (Germany)	54.7
Schwarz (Germany)	43.6
Rewe (Germany)	43.5
Auchan (France)	33.8 e
Edeka (Germany)	32.1 e
Aldi (Germany)	29.7 e
Leclerc (France)	29.0 e
Casino (France)	27.3 e
ITM Intermarché (France)	27.1 e
J Sainsbury (UK)	26.2 e

www.planetretail.net; e=estimated
*net sales Central and West Europe; **Metro is primarily active in cash & carry (wholesale) activities although it also operates retail food outlets.

4.2. **France**

Although retail chains first appeared in France during the second half of the nineteenth century, the first supermarket with self-service grocery sales was established only in the 1950's. Currently there are an estimated 16 000 + outlets representing the four principal retail formats. Freezer centre chains, which specialize in frozen food products, are in a fifth category of retail format although this category is less important than the other four in terms of sales and number of outlets.

Table 2 French Retail Chain Outlets by Format

Store Format	**Number of Outlets**	**Surface Area (1000 sq. m.)**
Hypermarket	1 435	8 206
Supermarket	5 525	6 879
Discount	4 074	2 708
Convenience	5 008	987
Total	**16 042**	**18 780**

Trade Dimensions - Panorama

French retail chains are among the most successful and dynamic in the world. In addition to being among the first to develop the hypermarket segment, French chains have expanded into many other retail markets, both in developed and developing countries.

Domestic restrictions on new store openings, particularly regarding larger outlets, have stimulated a trend towards mergers and consolidations within the French retail sector. Excluding the discount segment, seven chains now dominate the domestic retail grocery market: Carrefour, Auchan, Leclerc, Intermarché, Casino/Monoprix, System U and Cora. These groups differ in terms of ownership structure. Carrefour, Auchan, Casino and Cora are privately owned either in terms of a dominant family holding or a more dispersed share ownership structure or a mixture of both. Leclerc, Intermarché and System U are based more on a structure of independent retailers organized around a common brand and central office.

The seven chains have also developed differently in terms of strategy. Carrefour and Auchan have placed greater emphasis on international activities while System U and Intermarché have focused more on the domestic market. Similarly, Carrefour operates a range of store formats (hyper, super, convenience and discount) whereas Leclerc is more oriented to the large supermarket or small hypermarket format and Intermarché concentrates largely on the typical supermarket format. Finally, the chains have differed in terms of diversification strategy with Intermarché integrating backwards into food production while Casino is active also in the catering sector.

Table 3 Retail Chains' Sales Outside of France 2006

Retail Chain	**% of sales abroad**
Carrefour	52
Auchan	45
Cora	26
Casino	25
Intermarché	10
Leclerc	5
System U	0

www.lineaires.com

Within France, Carrefour is the largest chain in terms of total domestic sales. In terms of store numbers, however, other chains are leaders within specific format segments.

Table 4 Leading French Retail Chain by Format and Outlet Number 2006

Retail Chain / Format	**Number of outlets**
Hypermarkets	
Leclerc	428
Carrefour	218
Géant (Casino)	128
Auchan	127
Supermarkets	
Intermarché	1 474
Champion (Carrefour)	1 025
Super U (System U)	670
Atac / Simply (Auchan)	419
Convenience	
Franprix (Casino)	637
Shopi (Carrefour)	575
Ecomarché (Intermarché)	321
Marché U (System U)	149
Discount	
Lidl (Schwarz Group)	1 293
Ed (Carrefour)	848
Aldi	740
Leader Price (Casino)	471

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Recent trends within the French retail sector include a return to a strong price focus by most chains. Price was a key element underlying the initial success at consumer level of supermarkets and hypermarkets in France. From the 1980's, many chains shifted their attention to other marketing elements, such as customer service and product range, in an effort both to add value to their activities and to differentiate their stores from the competition. The arrival, and subsequent success, in France of the German discount chains, Aldi and Lidl, forced the main domestic chains to re-orientate their strategic focus back to price. The success of the 'hard discount' formula in France with its emphasis on limited product range, minimum customer service and competitive pricing resulted in falling market shares, and profitability, for the large domestic chains. The undermining of their home position threatened the overseas expansion of chains such as Carrefour which used domestic profits to fund new outlet openings abroad.

Efforts by the major French chains to compete in their home market with the German discount chains have taken several forms. Producer margins have been squeezed, with suppliers forced to concentrate more on cost reduction. The number of private label products, which are typically more price competitive, has increased at the expense of national producer brands. Finally, a number of the national chains have diversified into the discount segment. The Carrefour group now includes the Ed and Dia discount chains to complement its supermarket and hypermarket operations while Intermarché launched the Netto chain. Casino's Leader Price chain is a 'softer' version of the discount concept with a somewhat stronger emphasis on customer service and product range. Auchan's response to the discount trend was to create distinct discount sections within a number of its hypermarket stores.

Table 5 French Sales of Leading Retail Groups 2006

Group	**Sales (€ billion)**
Carrefour	45.8
Leclerc	31.7
Intermarché	26.5
Casino	25.7
Auchan	21.5
System U	15.6
Louis Delhaize (Cora)	7.7
Schwarz (Lidl)	5.4
Metro	4.5
Aldi	2.6

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4.3. **Italy**

Retail chain structures did not develop as early in Italy as in France. Nevertheless, the transition from a structure based on independent grocery traders to chain structures has progressed rapidly in recent years. The chain system is now well established in the country even if structures are more fragmented with a greater number of regional chains than is found in north European countries.

This late development and fragmentation is partially reflected in the smaller number of hypermarkets in Italy than in France. On the other hand, the number of supermarkets and convenience stores, which typically require lower investment outlays, is greater in Italy. These two formats combined account for over three quarters of total grocery sales in the country.

Table 6 Self-Service Retail Outlets in Italy by Format (December 2005)

Format	**Number of Stores**	**Market Share %**
Hypermarkets	595	16.3
Supermarkets	7 526	39.4
Convenience stores	7 924	37.8
Discount stores	2 953	6.5
Total	**18 998**	**100**

Agra: Distribuzione Alimentare in Italia

The initial delay in the adoption of chain structures in Italy provided opportunities for foreign retailers in neighbouring countries to establish and develop own operations in the market. As a result a number of French and German chains now have strong positions in the Italian grocery market although the leading chain, Coop, is Italian.

Table 7 Leading Grocery Chains in Italy (2005)

Chain	Country of Origin	Market Share %
Coop Italia	Italy	17.7
Conad – Leclerc	Italy-France	9.5
Carrefour	France	9.4
Auchan	France	7.9
Selex	Italy	7.2
Interdis	Italy	7.0
Esselunga	Italy	6.2
Despar	Italy	4.2
Sisa	Italy	3.9
Finiper - Unes	Italy	2.9
Pam	Italy	2.8
Sigma	Italy	2.4
Rewe	Germany	2.4
Crai	Italy	2.3
Lombardini	Italy	2.1

Agra: Distribuzione Alimentare in Italia

As in a number of other countries, Italian retail chains have grouped together to form larger buying groups. The principal groups are indicated below.

Table 8 Leading Italian Grocery Buying Groups 2007

Buying Group	Retail Chain Members	Market Share %
Coop Italia	Coop Italia, Sigma, Despar, Il Gigante	24
Intermedia	Auchan, Bennet, Lombardia, Sun	18
ESD Italia	Selex, Esselunga, Agora	17
Carrefour	Carrefour, Finiper	14.5
Mecades	Metro, Interdis, Sisa, Despar Nord, Crai	11
Conalec	Conad, Leclerc, Rewe	12

Agra: Distribuzione Alimentare in Italia

5. OVERVIEW OF SEAFOOD CONSUMPTION AND DISTRIBUTION IN FRANCE AND ITALY

5.1. France

5.1.1. Import Dependence

France is heavily import dependent for its seafood supplies. Recent estimates (2005) put annual domestic production (capture and aquaculture) at around 830 000 tonnes. This volume is insufficient to cover the demand for seafood and the balance is made up of imports with volumes for 2006 at over 1 million tonnes (worth €4 billion). Import volumes during 2006 were largely stable compared to 2005 but the value of imports increased by around 9%. These overall figures conceal important increases from a number of developing countries.

A proportion of French imports are re-processed and exported along with a share of domestic production although export volumes are considerably lower than imports at 350 000 tonnes (worth €1.3 billion) for 2006.

France imports a wide range of seafood products in chilled, frozen and preserved forms. Among the principal product categories imported are tuna, salmon and shrimp.

Table 9 French Imports: Individual Product Categories (tonnes)

	2005 tonnes	2006 tonnes	2005 €'000	2006 €'000
Tuna	138 000	140 000	331 800	370 900
Salmon	136 000	138 000	521 300	628 300
Shrimp	101 000	105 000	533 700	561 500
Pollock / Saithe	70 000	74 000	142 600	170 800
Mussels	59 000	59 000	83 600	84 800
Cod	54 000	57 000	232 900	270 700
Mackerel	28 000	29 000	36 900	49 700
Scallops	23 000	26 000	194 800	262 600
Cephalopods	23 000	25 000	59 700	59 900
All Products	**1 013 000**	**1 020 000**	**3 629 400**	**3 958 800**

Ofimer

In value terms, salmon was the number one import product for 2006 at €628 million followed by shrimp at €561 million.

5.1.2. Leading Suppliers

France sources its imports from a wide range of supplying countries. The top six suppliers are from developed countries with Norway the top supplier for 2006 in both volume and value terms. China became the leading developing country supplier in volume terms during 2006 with by far the strongest growth rates among leading suppliers. Madagascar was the top exporter in value terms for 2006.

Table 10 France: Leading Seafood Suppliers 2006

	Tonnes	% Change 2005/06	€ million	% Change 2005/06
Norway	98 000	-1	401	+15
UK	82 000	-22	361	-2
Spain	91 000	+4	262	+4
Denmark	52 000	+1	200	+4
Netherlands	54 000	-9	192	+3
USA	51 000	+1	188	+22
Madagascar	27 000	+1	135	+5
China	42 000	+29	115	+52
Germany	37 000	+1	109	-
Chile	32 000	-6	109	+15

Ofimer: Bilan Annuel 2006 Commerce Extérieur

Among developing countries, other key suppliers include Chile, Thailand, Brazil and Morocco. In addition to China, several other countries including Ecuador, Peru and Vietnam, showed strong sales growth to the French market in 2006. The biggest decline was registered by Brazil with volumes, mainly of frozen shrimp, down 23% to 21 000 tonnes.

Table 11 France: Leading Seafood Suppliers from Developing Countries

	2006 tonnes	% Change 2005/06	2006 € million	% Change 2005/06
Madagascar	27 000	+1	135	+5
China	42 000	+29	115	+52
Chile	32 000	-6	109	+15
Thailand	28 000	+19	81	+27
Brazil	21 000	-23	80	-16
Morocco	28 000	+15	79	+8
Argentina	19 000	-	78	-
Ecuador	23 000	+25	78	+28
Vietnam	15 000	+40	68	+32
Peru	40 000	+11	63	+35
India	18 000	-	63	-
Côte d'Ivoire	24 000	+6	58	+5

Ofimer: Bilan Annuel 2006 Commerce Extérieur

5.1.3. Products from Developing Countries

French DC imports cover a wide range of seafood products. Key product categories include shrimp, canned tuna, fish fillets, scallops and sardines.

Table 12 France: Principal Products Supplied by Developing Countries

	Principal Product Categories*
Madagascar	Shrimp, canned tuna
China	Alaska pollock, cod, salmon, monkfish, misc. seafish fillets, misc. crustaceans
Chile	Salmon, scallops, mussels, surimi, misc. seafish fillets
Thailand	Canned tuna, misc. seafish fillets, shrimp, misc. freshwater fish, misc. crab, surimi
Brazil	Shrimp, misc. whole seafish, monkfish
Morocco	Anchovies, sardines
Argentina	Scallops, hake, misc. seafish fillets, misc. whole seafish
Ecuador	Shrimp, canned tuna
Vietnam	Shrimp, misc. seafish fillets, scallops, misc. freshwater fish, misc. crab
Peru	Scallops, shrimp, misc. seafish fillets, misc. whole seafish, squid, hake
India	Shrimp, squid, misc. molluscs, misc. whole seafish, cuttlefish
Côte d'Ivoire	Canned tuna, misc. whole seafish

Ofimer: Bilan Annuel 2006 Commerce Extérieur
*based on trade statistics categories

5.1.4. Retail channels

Seafood products imported into France (and Italy) are destined either for direct consumption (via retail or catering channels) or for further processing for eventual domestic consumption (via retail or catering channels) or export.

Total annual seafood consumption in France is estimated at over 830 000 tonnes. Just over 70% of this amount, almost 590 000 tonnes, goes through the retail sector with catering sales accounting for the balance. Of this total retail volume, 87% is accounted for by retail chains (also including home delivery groups). This aggregate percentage varies significantly between product groups. The retail chain share is effectively 100% for frozen and preserved products while it is around 70% for chilled products. The remaining 30% for chilled products is accounted for by fishmongers, direct sales from producers (for example, oyster sales) as well as local open-air or covered markets which are found throughout France.

Table 13 France: French Seafood Consumption by Distribution Channel

2006	**Retail Chains**	**Retail Other**	**Catering**
Chilled %	47	19	34
Delikatessen* Chilled %	86	4	10
Frozen %	56	-	44
Preserved %	89	1	10
Total %	**62**	**9**	**29**
Total tonnes	**515 400**	**71 900**	**246 600**

Ofimer: Bilan Annuel 2006 Consommation (TNS / GIRA Foodservice data)
* 'traiteur' category which includes smoked and marinated

Within the above segments, the retail chain share can vary significantly for individual products. For example, in the chilled fish segment, the retail chains account for over 80% of retail sales for Nile perch and salmon but less than 50% for species such as turbot and sole which can be a specialty item for fishmongers.

5.1.5. Retail sales trends

According to Ofimer / TNS estimates, French retail sales have been on a steady, if modest, upward trend in recent years. Over the 2001 – 2005 period, volumes increased by 3.4% to just under 600 000 tonnes. In value terms, the upward trend has been weaker, with an increase for the five year period of less than 2%, to €5.2 billion. The positive volume trend came to an end in 2006 with total sales down 3% to less than 590 000 tonnes. This overall decline followed falls in sales of chilled fish, such as Nile perch, and live bivalves notably oysters and mussels.

Sales trends have, however, varied significantly between product categories. One of the fastest growing segments has been that covering chilled delicatessen type products which has increased by 53% to an estimated volume of 121 000 tonnes over the 2001 – 2006 period. In contrast, the whole chilled fish and preserved seafood (including mainly canned fish products) segments have been declining during the period. Mixed trends are also evident within individual categories: frozen bivalve and crustacean imports have, for example, been growing faster than frozen fish imports.

Table 14 France: Retail sales by key product categories (tonnes)

	2001	**2002**	**2003**	**2004**	**2005**	**2006**
Chilled total	256 700	240 900	239 800	245 000	242 500	221 500
Chilled whole fish	58 500	53 800	50 000	47 000	45 900	42 100
Chilled fish fillets & portions	84 900	83 800	85 200	86 900	84 700	79 500
Live & chilled bivalves	89 700	80 700	81 800	87 500	89 400	79 700
Chilled delicatessen	78 800	85 600	95 600	100 300	118 400	120 500
Frozen	132 300	129 100	131 100	136 600	137 500	138 000
Preserved	109 800	111 000	116 600	113 200	108 700	107 300
All product categories	**577 600**	**566 700**	**583 200**	**595 100**	**607 200**	**587 300**

Ofimer: Bilan Annuel 2006 Consommation

5.2. **Italy**

5.2.1. Import dependence

As in the case of France, there is a strong import dependence regarding seafood products in Italy. Domestic production, including capture and aquaculture output, at less than 500 000 tonnes only partially covers the country's total consumption requirements. Seafood imports (including fishmeal/oil) amounted to almost one million tonnes in 2006. The import trend has been positive in recent years, rising from 730 000 tonnes in 1996 to 830 000 tonnes in 2000.

In terms of imported products, among the main category groups are molluscs, prepared seafood and fresh fish. Key individual product categories include shrimp, squid, tuna, and hake products.

Table 15 Italy: Seafood Imports by Main Product Category ('000 tonnes)

Product type	**1996**	**2000**	**2006**
Molluscs, fresh, frozen, cured	169.27	209.55	259.07
Prepared and preserved fish	85.25	127.83	183.23
Fresh fish (excl. fillets)	67.85	90.83	116.22
Frozen fish (excl. fillets)	133.18	117.19	90.32
Crustaceans, fresh, frozen, cured	48.34	63.10	89.13
Frozen fish fillets	50.40	50.59	70.38
Meals and Oils	109.29	106.19	68.67
Cured fish	38.71	33.55	37.99
Fresh fish fillets	8.40	14.62	28.46
Prepared and preserved molluscs	7.15	7.34	13.87
Prepared and preserved crustaceans	4.84	6.29	8.78
Live fish	6.59	2.66	4.00
Grand Total	**729.3**	**829.7**	**970.1**

Euro stat; C Cataract: Seafood markets in Southern EU countries

Also in line with France, the top suppliers to Italy are mainly developed countries. Spain was the number one supplier in 2006 followed by France and the Netherlands. Among the top six suppliers, just one, Thailand, is a developing country.

Table 16 Italy: Leading Seafood Suppliers 2006

	tonnes	**% Change 2005/06**
Spain	185 000	+6
France	60 000	-
Netherlands	56 000	+7
Denmark	47 000	-7
Thailand	43 000	+17
Greece	40 000	-
Germany	37 000	-
Argentina	36 000	+46
Ecuador	33 000	+21
Chile	33 000	-16

Istat

Nevertheless, Italy is supplied by a large number of DC exporters. Imports (mainly shrimp and basa) from Vietnam, the fifth largest supplier, were the fastest growing among DC suppliers in 2006. Imports from Colombia showed the biggest decline, down 31% to 15 000 tonnes, due to lower supplies of canned tuna products.

Table 17 Italy: Leading Developing Country Suppliers 2006

	tonnes	% Change 2005/06
Thailand	43 000	+17
Argentina	36 000	+46
Ecuador	33 000	+21
Vietnam	33 000	+52
Morocco	24 000	+10
India	21 000	+29
Malaysia	19 000	+12
Peru	9 000	-13
China	17 000	+39
Colombia	15 000	-31
South Africa	13 000	-14
Senegal	9 000	-19

Istat

In terms of products imported from developing countries, the Italian range appears almost as extensive as that of France although different in composition, having a stronger emphasis on cephalopods and South American hake fillets.

Table 18 Italy: Principal Products Supplied by Developing Countries

Thailand	Squid, canned tuna, cuttlefish, shrimp, octopus, fillets, prepared fish products
Argentina	Fish fillets, shrimp
Ecuador	Shrimp, canned tuna
Chile	Mussels, fillets, frozen round / h&g fish
Vietnam	Shrimp, fillets, squid, cuttlefish, octopus, prepared shellfish
Morocco	Octopus, canned and salted fish, cuttlefish, squid
India	Shrimp, cuttlefish, squid, octopus
Malaysia	Shrimp, cuttlefish, squid, canned fish, octopus
Peru	Squid, cuttlefish, octopus, prepared fish products
China	Shrimp, squid, cuttlefish, fillets, prepared fish products, octopus
Colombia	Canned tuna
South Africa	Squid, cuttlefish, fillets, prepared fish products

Istat

5.2.2. Retail chain shares

Given the relatively late development of the retail chain network in Italy, it is not surprising that Italian chains account for a lower share of retail seafood distribution compared with France. According to Ismea, the retail chains' share of Italian retail seafood sales was 66% in 2005 which contrasts with the figure of around 80% indicated above for the French market.

As in France, however, the chains' share of sales varies according to the product category. In line with France, the Italian chains account for over 90% of frozen and preserved seafood sales while the share of fresh fish sales is significantly lower, at less than 50%. The corresponding share for cured products is in between at 68%.

Table 19 Italy: Share of Retail Seafood Sales by Distribution Channel

	Retail Chains	Traditional Distribution
Chilled	48	52
Frozen	93	7
Preserved	96	4
Cured	68	31
All Products	**66**	**34**

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6. RESULTS OF FRENCH SURVEY

As noted earlier, the store surveys in France covered a total of 23 retail outlets including nine hypermarkets, seven supermarkets, two convenience stores and five discount stores. Surveys were conducted on packaged products in these stores covering preserved, frozen and chilled products.

Over 600 observations of branded products from developing countries were noted. This figure includes identical products which were on offer in more than one outlet. The number of individual products noted came to 324.

6.1. Product presentation and categories

The great majority of the DC products surveyed are either preserved or frozen. The preserved products are essentially canned but the category also included products preserved in jars. Almost three quarters of the total products surveyed fell into the general preserved category. Most of the balance were frozen products while just two products, less than 1%, were chilled.

Table 20 France: Breakdown of DC Products by Product Presentation

Presentation	Products
Preserved	238 (73%)
Frozen	84 (26%)
Chilled / Smoked	2 (<1%)
Total	**324**

The canned / preserved group is more concentrated in terms of product categories (tuna, sardines etc) at 10, while the smaller frozen group contains a wider number of around 17.

Table 21 France: Product Categories by Main Presentation Groups

Preserved	Frozen
Anchovies	Alaska Pollock
Crab Meat	Cod
Herring	Cuttlefish
Octopus	Dab
Salmon	Hake
Sardines	Lobster
Seafood Cocktail	Monkfish
Shrimp	Mussels
Surimi	Ray
Tuna	Red Mullet
	Salmon
	Scallops
	Shrimp
	Sole
	Squid
	Surimi
	Whitebait

As noted above, the 324 DC products surveyed are composed of twenty four product categories covering most of the principal seafood categories consumed in the French market. The list is, however, dominated by three categories: anchovies, tuna and sardines which together account for over 60% of the total. The number of anchovy and the number of tuna products were the same at 69 and exceeded the number of sardine products at 58 which is perhaps surprising given the much stronger volumes of canned tuna and sardines imported annually into France from developing countries (around 80 000 and 13 000 tonnes respectively) compared to the preserved anchovy import volumes (less than 7 000 tonnes). However, the strong anchovy showing is probably due to the large number of relatively small volume products which are retailed in the anchovy category compared to the other two. In contrast, canned tuna sales, particularly relating to imports from developing countries, tend to be characterized more by a relatively small number of high volumes products.

Prepared anchovies, tuna and sardine products from developing countries were noted in all twenty three stores surveyed a finding which reflects the importance of these categories in the French market.

A number of categories on the other hand are noteworthy by the relatively small number of products observed. Shrimp from developing countries, for example, is one of the most important import categories for France and yet just thirty eight products were counted. This figure is small in the context of the total number of shrimp products in French retail outlets and is partly due to the practice of re-processing or re-packing imported shrimp products which takes place in both France and other European countries such as Belgium and the Netherlands. The majority of shrimp products sold in French retail outlets therefore have a French or EU indication of origin on the pack even though the original raw material may have come from a developing country.

In contrast, the low number of salmon products is not surprising despite their importance in the French market and is due to the largely European domination of production and processing of farmed salmon. Otherwise the relatively low number of products for most categories is striking, a result which no doubt reflects the importance of the European processing industry for the French seafood market.

Table 22 France: Survey of DC Products by Product Category

Category	**Number of Products**	**% of Total**
Anchovies	69	21.0
Tuna	69	21.0
Sardines	58	17.6
Shrimp	38	11.6
Crab	19	5.8
Salmon	11	3.4
Cod	10	3.0
Hake	9	2.7
Cuttlefish	7	2.1
Ray	4	1.2
Sole	4	1.2
Monkfish	3	0.9
Squid	3	0.9
Surimi	3	0.9
Red Mullet	3	0.9
Alaska Pollock	2	0.6
Lobster	2	0.6
Mussels	2	0.6
Octopus	2	0.6
Scallops	2	0.6
Dab	1	0.3
Herring	1	0.3
Seafood Cocktail	1	0.3
Whitebait	1	0.3
Total (24)	**324**	**100**

6.2. Countries of origin

The 324 DC products identified during the survey have as origin a multiplicity of countries. In total, twenty three developing countries were noted: eight each from Africa (including Indian Ocean islands) and Asia, four from South America and three from East Europe.

In terms of the 324 products, Africa accounted for over a half of the total thanks to the importance of Morocco as a supplier of canned fish products to France. Asia accounted for a third of the total while South America accounted for 9% and Eastern Europe just 3%.

Table 23 France: Origin by Continent of DC Products

	Countries	**Products**
Africa	8	182
Asia	8	106
South America	4	27
East Europe	3	9
Total	**23**	**324**

Morocco is by far the most important country in the group of twenty three. Although the country ranks just fifth as a developing country supplier to France, it is perhaps the top country for finished products, particularly for canned seafood. Other countries ahead of Morocco in terms of French imports include China, Peru and Chile but these are more oriented to providing raw material for the French processing industry rather than supplying final consumer products.

Table 24 France: Origin of DC Products by Country

	Products	**%**
Morocco	129	39.8
Thailand	32	9.9
Vietnam	24	7.4
Côte d'Ivoire	23	7.1
China	21	6.5
Seychelles	14	4.3
Malaysia	11	3.4
Chile	9	2.8
Argentina	9	2.8
Indonesia	9	2.8
Ecuador	8	2.5
India	7	2.2
Ghana	6	1.9
Madagascar	4	1.2
Poland	4	1.2
Lithuania	3	0.9
Senegal	3	0.9
South Africa	2	0.6
Turkey	2	0.6
Mauritius	1	0.3
Myanmar	1	0.3
Papua New Guinea	1	0.3
Uruguay	1	0.3
Total	**324**	**100**

Thailand is the second supplier of the products surveyed but it has the largest range of product categories at eight, just ahead of China at six. Thailand is the fourth largest developing country to supply seafood to France but, like Morocco, is oriented towards value added products. Although Morocco tops the list in terms of number of DC products surveyed, its product category range is relatively limited at just four.

Table 25 France: List of Developing Countries by Product Category

Country	Product Category
Thailand	Cod, Crab, Cuttlefish, Red Mullet, Salmon, Shrimp, Squid, Tuna
China	Alaska pollock, cod, dab, monkfish, salmon, squid
Chile	Crab, mussels, salmon, scallops
Malaysia	Crab, Lobster, Shrimp
Morocco	Anchovies, octopus, sardines, seafood cocktail
Vietnam	Crab, Red Mullet, Shrimp, Sole
India	Cuttlefish, Shrimp, Squid
Indonesia	Crab, Cuttlefish, Shrimp
Poland	Hake, Herring, Salmon
Argentina	Hake, Ray
Ecuador	Shrimp, Tuna
Madagascar	Shrimp, Tuna
Turkey	Anchovies, Whitebait
Côte d'Ivoire	Tuna
Ghana	Tuna
Lithuania	Surimi
Mauritius	Tuna
Myanmar	Shrimp
Papua New Guinea	Tuna
Senegal	Tuna
Seychelles	Tuna
South Africa	Hake
Uruguay	Hake

6.3. Brands

A key issue noted earlier was the extent to which suppliers in developing countries sell their products under their own brand in the final market or whether the products are marketed under the brand of a company based in the European market.

The survey of 324 DC products noted 71 brands (or company names) covering 306 products. Branding and company names were absent or unclear during the survey for the remaining 18 products. Of the 71 brands, 11 (61 products) were owned wholly or in part by companies in developing countries. 24 brands (112 products) belonged to European importers or processors while 26 brands (122 products) were retailer private labels. The remaining 10 brands (12 products) were difficult to classify.

Table 26 France: Brands of DC Products Surveyed

	Brands	Products
Developing country owned brands	11	61
Developed Country Processor / Importer brands	24	112
Retailer brands	26	122
Other brands (unclassified)	10	12
Unbranded products	-	17
Total	**71**	**324**

It was not possible from the product information collected to determine whether the developed country importers/producers had a capital interest in the production operation in the developing country or whether the relationship between the developed country producers / importers and developing country producers was only commercial.

6.3.1 Developing country brands

The eleven developing country brands are owned by eight companies: six based in Morocco, one in Thailand and one in Madagascar. Two companies, La Monegasque (Morocco) and Pataya Food Industries (Thailand) own five of the brands between them and account for 48 of the 61 products.

Table 27 France: Developing Country Brands and Product Categories

Company	**Brand**	**Product Category (number of products)**
La Monegasque	La Monegasque	Anchovies, Sardines (19)
	Les Marinous	Anchovies, Octopus, Sardines, Cocktail (10)
	Cresca	Anchovies (1)
Pataya Food Ind	Nautilus	Crab, Shrimp (14)
	Kileoa	Shrimp, Salmon (4)
Unimer	Titus	Sardines (5)
Marsa	Marsa	Sardines (4)
Armorial	Armorial	Sardines (1)
Belma	Belma	Sardines (1)
Aveiro	Liberator	Sardines (1)
OSO	OSO	Shrimp (1)

The 64 products covered six product categories, anchovies, sardines, crab, octopus, shrimp and seafood cocktail. However, preserved anchovies (27) and canned sardines (16) accounted for two thirds of the total.

6.3.2 Importer and processor brands

Of the total of 324 products from developing countries surveyed, 112 carried brands (or names) of processors and specialized distributors (excluding retailers) based in France or other developed countries. The great majority of this group were companies with their own processing facilities. The group covered a diverse range of companies from family owned French operations (such as Belmonte and Conserveries Provencales) to large multinational groups (such as Findus, Paul Paulet and Saupiquet). Typically, these companies source products from developing countries either through wholly or partly owned processing facilities in these countries or through contracts with independent firms in the developing countries.

Often products sourced in developing countries complement an existing range of products produced in France or another developed country. Paul Paulet is a French based fish cannery and accounted for 16, all canned tuna products, of the 112 products in this category. The firm is now owned by Lehman Brothers, a financial group which purchased the company from H J Heinz along with canning operations in other countries including the Seychelles and Ghana. Canned products identified in the survey and marketed under the Paul Paulet's French brand, Petit Navire, are likely to have been produced in the company's plants in Ghana and the Seychelles. The French unit produces tuna salad products while the African and Indian Ocean plants focus more on traditional canned tuna products.

Table 28 France: Developed Country Brands and Product Categories

Company	Developed Country Brand or Name	Product Category (no. of products)
Angelini	Angelini	Sardines (1)
Belmonte	Belmonte	Anchovies (2)
Chancerelle	Connetable	Sardines, Tuna, Anchovies (12)
Conservas Garavilla	Isabel	Tuna (1)
Conserveries Provencales	Conserveries Provencales	Anchovies (7)
ETS Antwerp	Merlicieux	Shrimp, Sole (4)
Findus	Findus	Hake, Shrimp (2)
Fjord Import	Fjord	Monkfish (1)
Frial		Cod, Hake, Ray, Sole (6)
Gelazur	Gelazur	Cuttlefish, Shrimp, Whitebait (3)
Gimbert Ocean	Gimbert Ocean	Squid (1)
Icelandic Group	Seastar	Cod, Cuttlefish, Monkfish, Ray (4)
Icelandic Group	(Icelandic)	Alaska Pollock, Cod, Hake, Salmon (4)
Krustanord	Krustanord	Shrimp, Cuttlefish (3)
Mag	Mag	Cuttlefish (1)
Miceli	Miceli	Anchovies (12)
Oceamar	Oceamar	Cod (1)
Pescanova	Pescanova	Hake (1)
Paul Paulet	Petit Navire	Tuna (16)
Saupiquet	Saupiquet	Sardines, Tuna (11)
Setraco	Ocean Pride	Shrimp (1)
Sofimar	Millenium	Hake, Lobster, Shrimp (3)
Sofrimar	Tropic	Shrimp, Lobster (3)
Vanelli	Vanelli	Anchovies, Sardines (12)

6.3.3 Retailer brands

Of the 306 branded products, 122 carried a retail, or private label, brand. In total, some 26 retail brands were identified for the 23 stores visited. Some chains carried just one retailer label (Leader Price) although most carried several.

Table 29 France: Retail Brands and Product Categories

Group	Chain	Brand	Product Category
Aldi	Aldi	Delikato	Salmon
		Les Doris	Tuna, Sardines
		Macli	Crab, Shrimp
Auchan	Atac	Auchan	Salmon, Tuna
	Auchan	Auchan	Hake, Sardines, Shrimp, Tuna
Carrefour	Carrefour	No. 1	Shrimp, Tuna, Sardines
		Silver Sea	Scallops, Shrimp, Mussels
		Carrefour	Tuna
	Champion	Champion	Anchovies, Tuna
		No. 1	Crab Meat, Surimi
	8 a huit	Gran Jury	Tuna, Anchovies
	Ed	Dia	Anchovies, Sardines
		Ed	Tuna
Casino	Géant	Casino	Sardines, Anchovies, Tuna, Surimi
	Casino	Casino	Tuna, Sardines
	Monoprix	Monoprix	Sardines, Tuna
	Franprix	Leader Price	Alaska Pollock
	Leader Price	Leader Price	Cod, Crab, Salmon, Shrimp, Tuna, Hake, Anchovies, Cuttlefish, Dab, Monkfish, Mussels, Ray, Mullet, Sole, Squid
Cora	Cora	Cora	Sardines, Tuna, Shrimp
		Winny	Shrimp, Tuna, Anchovies, Crab, Salmon
		Kristal	Red Mullet
ITM	Intermarché	Top Budget	Tuna
		Odyssee	Crab
Leclerc	Leclerc	Eco+	Crab, Shrimp, Tuna
		Peche Ocean	Sardines
		Ronde de Mer	Anchovies
Lidl	Lidl	Nixe	Tuna, Sardines
		Ocean Wave	Crab
		Sargona	Tuna
System U	Super U	U	Sardines

*Name of buying office

6.4. **Store formats and banners**

The number of DC products varied considerably between the different retail formats. Predictably, the hypermarket format, with its emphasis on product range and competitive prices, accounted for an above average number of DC products. At the opposite end, convenience stores, typically carrying a relatively small product range with an emphasis on national brands, accounted for a relatively small number.

Table 30 France: DC Products by Retail Format

Format	Stores Visited	DC Products
Hypermarkets	9	214
Supermarkets	7	105
Convenience Stores	2	14
Discount Stores	5	51

The results also suggest that DC products with retailer brands are more common in discount and hypermarket outlets and less common in supermarkets and convenience stores. This outcome is again consistent with the larger product range normally available in hypermarkets as well as the strong price orientation of hypermarkets which favour competitively priced products from developing countries.

Table 31 France: DC Products with Retailer Brands by Retail Format

Format	Stores Visited	DC Products with Retailer Labels (average per store visited)
Hypermarkets	9	60 (6.7)
Supermarkets	7	30 (3.3)
Convenience Stores	2	5 (2.5)
Discount Stores	5	34 (7)

Significant differences were also apparent between individual retail chains. Chains such as Casino and Cora stocked an above average number of DC products while System U, Intermarché and Leclerc accounted for a relatively low number.

Table 32 France: DC Products by Retail Group

Group	Banner	Stores Visited	DC Products
Aldi	Aldi	1	7
Auchan	Auchan, Atac	3	62
Carrefour	Carrefour, Champion, 8 a huit, Ed	5	91
Casino	Géant, Casino, Monoprix Franprix, Leader Price	8	151
Cora	Cora	1	44
Intermarché	Intermarché	1	18
Leclerc	Leclerc	2	26
Lidl	Lidl	1	5
System U	Super U	1	16

Developing country products with retailer labels were noted in each of the ten retail groups visited although again the number of products varied considerably from one group to another. The one store from the System U group visited yielded just one product while the one Aldi store visited yielded 6 products. The Casino and Carrefour groups yielded the highest number of products, 42 and 24 respectively, over half of the total. It should, however, be noted that both of these groups also had the highest number of stores visited, almost half of the total. Although it is not possible to establish a simple relationship between the number of stores in a group visited and the number of developing country products with retailer labels in that group, the results suggest that certain groups such as Cora and Casino are more likely to stock DC products with retailer labels while other retails groups, such as System U, Leclerc and Intermarché, are less likely. As discussed later, the openness or otherwise of retail chains to introducing DC products under their own brands may suggest opportunities to DC exporters which are examining marketing options on approaches to retail chains.

Table 33 France: DC Products with Retailer Brands by Retail Group

Group	Banner	Stores Visited	DC Products with Retailer Brands
Aldi	Aldi	1	6
Auchan	Auchan, Atac	3	11
Carrefour	Carrefour, Champion, 8 a huit, Ed	5	21
Casino	Géant, Casino, Monoprix, Franprix, Leader Price	8	49
Cora	Cora	1	17
Intermarché	Intermarché	1	3
Leclerc	Leclerc	2	5
Lidl	Lidl	1	5
System U	Super U	1	1

The breakdown by store also points to an above average presence of DC products under the retailer brand or under DC brands for the Casino group stores particularly the hypermarket format (Geant) and the discount format (Leader Price).

Table 34 France: Brand Breakdown by Retail Banner

Store Banner	Total Number of DC Products	Retailer Brands	DC Brands
Carrefour	52	10	17
Champion	26	9	2
8 a 8	5	3	0
ED	16	3	7
Auchan	56	10	8
Atac	22	3	6
Geant	85	18	27
Casino	20	6	6
Monoprix	31	8	7
Franprix	9	2	0
Leader Price	25	18	0
Leclerc	26	5	9
Intermarché	18	3	0
Cora	44	17	0
Super U	16	1	2
Lidl	5	5	0
Aldi	7	6	1

7. RESULTS OF ITALIAN SURVEY

As noted earlier, the store surveys in Italy covered a total of 43 retail outlets including 11 hypermarkets, 14 supermarkets, 8 convenience stores, 9 discount stores and 1 freezer centre. At the wholesale level, 1 cash & carry was surveyed. A total of 519 observations of packaged products from developing countries were noted. This figure includes identical products which were on offer in more than one outlet. The number of different individual products noted came to 272.

7.1. Product presentation and categories

As in the case of France, the great majority of DC products surveyed were either preserved or frozen, chilled products accounting for less than 5%. The preserved products, mainly canned, accounted for just under 60% of the total with the frozen share at 36%.

Table 35 Italy: DC Product Breakdown by Product Presentation

Presentation	**Products**
Preserved	160 (59%)
Frozen	99 (36%)
Chilled / Smoked	13 (5%)
Total	**272**

The preserved and chilled groups are more concentrated in terms of product categories at just six and three respectively while the frozen group contains a relatively large number of categories at fifteen.

Table 36 Italy: Product Categories by Main Presentation Groups

Preserved (No. of Products)	**Frozen (No. of Products)**	**Chilled / Smoked (No. of Products)**
Anchovies (47)	Clams (2)	Bass (1)
Crab (11)	Cocktail (5)	Bream (1)
Mackerel (26)	Crab (1)	Salmon (11)
Sardines (21)	Cuttlefish (4)	
Sea Urchins (2)	Grouper (2)	**Total Products 13**
Tuna (52)	Hake (35)	
	Octopus (5)	
Total products 160	Pangasius (1)	
	Plaice (4)	
	Shrimp (28)	
	Spiny Lobster (2)	
	Squid (2)	
	Surimi (7)	
	Whitebait (2)	
	Total Products 99	

The 272 DC products surveyed were composed of twenty three product categories covering many of the principal seafood categories consumed in the Italian market. Over a third of the products were accounted for by two categories: tuna and anchovies while over three quarters are covered by just six categories: tuna, anchovies, shrimp, mackerel, sardines and hake.

Table 37 Italy: DC Products by Product Category

Category	Number of Products	% of Total	Observations
Tuna	53	19.6	
Anchovies	47	17.3	
Hake	31	11.4	
Shrimp	28	10.3	
Mackerel	26	9.6	
Sardines	21	7.7	
Crab	12		
Salmon	11		
Surimi	7		
Octopus	5		
Seafood Cocktail	5		
Cuttlefish	4		
Plaice	4		
Cod	3		
Clams	2		
Sea Urchins	2		
Spiny Lobster	2		
Squid	2		
Whitebait	2		
Grouper	2		
Pangasius	1		
Seabass	1		
Seabream	1		
Total 23	**272**		

7.2. **Country of origin**

The 272 DC products identified during the survey have as origin a multiplicity of countries. In total, twenty nine developing countries were noted: nine from Asia, seven from Africa, eight from South America and five from East Europe.

In terms of the 272 products, Africa accounted for over a third of the total thanks to the importance of Morocco as a supplier of canned fish products, notably canned anchovies, mackerel and sardines. Eastern European countries including Turkey accounted for 23% while Latin American and Asian countries accounted for a fifth each.

Table 38 Italy: DC Product Origin by Continent

	Countries	Products
Africa	7	100
Asia	9	54
Latin America	8	56
East Europe	5	62
Total	**29**	**272**

As in the case of France, Morocco is by far the most important country in terms of number of products, accounting for over a quarter of all products surveyed. Albania is in second position thanks to its preserved anchovy production. Thailand is the most important Asian country with 21 products.

Table 39 Italy: DC Product Origin by Country

	Products	**%**
Morocco	66	24.4
Albania	28	10.3
Thailand	21	7.7
Poland	20	7.4
Côte d'Ivoire	18	6.6
Uruguay	15	5.5
Vietnam	13	4.5
Colombia	12	4.4
Ecuador	9	3.3
Malaysia	8	3.0
Argentina	7	2.6
Chile	7	2.6
China	6	2.2
Lithuania	6	2.2
South Africa	5	1.8
Croatia	4	1.5
Cuba	4	1.5
Turkey	4	1.5
Namibia	3	1.1
Senegal	3	1.1
Tunisia	3	1.1
India	2	0.7
Seychelles	2	0.7
Costa Rica	1	0.4
Indonesia	1	0.4
Pakistan	1	0.4
Philippines	1	0.4
Papua New Guinea	1	0.4
Venezuela	1	0.4
Total	**272**	**100.0**

While Thailand is the third supplier of in terms of number of products, its 21 products covered the largest range of product categories at eight, ahead of Morocco and Vietnam with five categories each.

Table 40 Italy: Developing Countries by Product Category

Country	Product Category
Thailand	Clams, Cocktail, Crab, Cuttlefish, Octopus, Shrimp, Squid, Tuna
Morocco	Anchovies, Mackerel, Octopus, Sardines, Tuna
Vietnam	Cocktail, Crab, Octopus, Pangasius, Shrimp
Chile	Crab, Hake, Salmon, Urchins
China	Crab, Shrimp, Surimi, Whitebait
Poland	Cod, Hake, Plaice, Salmon
Albania	Anchovies, Mackerel, Sardines
Croatia	Anchovies, Seabass, Seabream
Malaysia	Crab, Shrimp, Squid
Uruguay	Hake, Cuttlefish, Tuna
Cuba	Lobster, Tuna
Ecuador	Shrimp, Tuna
Lithuania	Crab, Surimi
South Africa	Hake, Seafood Cocktail
Turkey	Anchovies, Whitebait
Argentina	Hake
Colombia	Tuna
Costa Rica	Tuna
Côte d'Ivoire	Tuna
India	Shrimp
Indonesia	Crab
Namibia	Hake
Pakistan	Grouper
Papua New Guinea	Tuna
Philippines	Tuna
Senegal	Tuna
Seychelles	Tuna
Tunisia	Shrimp
Venezuela	Shrimp

7.3. **Brands**

A key issue noted earlier was the extent to which suppliers in developing countries sell their products under their own brand in the final market or whether the products are marketed under the brand of the importer in the European market.

Among the 272 DC products surveyed, it was possible to identify 110 brands (or company names) covering 257 products. Branding and company names were absent or not identifiable during the survey for the remaining 15 products. Of the 110 brands, just 11 (18 products) were owned wholly or in part by companies in developing countries. In total, 80 brands (198 products) belonged to European importers or processors while 13 brands (33 products) were retailer brands. The remaining 6 brands were difficult to classify.

Table 41 Italy: DC Products by Brand Type

	Brands	Products
Developing country owned brands	11	18
Processor / Importer brands	80	198
Retailer brands	13	33
Others brands (unclassified)	6	8
Unbranded products	-	15
Total	**110**	**272**

7.3.1. Developing country brands

The eleven developing country brands are owned by companies based in Ecuador, Thailand, Lithuania, South Africa, Tunisia, Vietnam and Malaysia. The origin of one company is uncertain. The Thai company, Pataya Food Industries owns two brands accounting for 5 products.

Table 42 Italy: Developing Country Brands and Product Categories

Company	Brand	Product Category
Plunges Koop.	Blu Mares	Surimi
Giolly Fish	Shrimp Valley	Shrimp
Eastern Global	Crystal Prawns	Shrimp
Grobest	Fish Line	Shrimp
Irwin & Johnson	I & J	Hake
Ocean Invest	Ocean Invest	Shrimp
Exporklore	Pacific	Shrimp
Pataya Food Ind	Nautilus	Crab
Pataya Food Ind	Kileoa	Crab
Sofipêche	Sofipêche	Shrimp
Vichuanai	Vichuanai	Surimi

The 18 products covered four product categories, shrimp, crab, hake and surimi. However, shrimp products accounted for over half of the total.

7.3.2. Importer and processor brands

Of the total of 271 products from developing countries surveyed, 198 carried brands (or sometimes just simply names) of processors and specialized distributors (excluding retailers) based in Italy or other developed countries. As in France, the group included several leading domestic food and seafood processors (such as Buitoni, Panapesca, Zarotti), international food groups with operations in Italy (such as Nestle, Unilever and Bolton) as well as a number of leading seafood importer distributors (such as Eurofood and ICAT).

Table 43 DC Products with Brands of Selected Italian Processors and Importers

Company	Brand	Product Category
Alco	Alco	Tuna
Amati Riccione	Amati	Anchovies
Buitoni	Buitoni	Cuttlefish, Hake
Eurofood	Sorba	Sea Urchins
Effegi	Alto Mare, Effegi Service, Gran Party, Itaca	Octopus, Seafood Cocktail, Shrimp, Surimi, Whitebread
Finest Food Specialities	Finest Food Specialities	Surimi
Fredo	Fredo, Alta Marea	Anchovies, Tuna
General Conserve	Janus	Mackerel, Sardines, Tuna
Gruppo Cremonini/Marr	Albatross	Shrimp
ICAT	ICAT Food, Donzela, Stella Verde, Primier, Ocean, Ardea	Anchovies, Mackerel, Sardines, Tuna
I. Mazzola	Peschefreccho, Goldon Lion, Capri	Tuna, Mackerel, Sardines
La Nef	La Nef, Re Salmone, Reale di Norvege	Salmon
Mancini	Gran Menu	Anchovies
Nuova Castelli	Airone, Alba, Maremi	Mackerel, Tuna
Nuovo Azzurro	Nuovo Azzurro	Seabass, Seabream
Panapesca	Panapesca, Frescogel, Onda Blu	Clams, Hake, Surimi
Rizzoli	Delicious, Marechiarro	Anchovies, Mackerel, Sardines
Sud Pesca	Flott, La Kaletta	Anchovies
Zarotti	Zarotti, Nocchiero, Sipa Sud	Anchovies

The relation between the Italian processor or distributor and the developing country supplier is often difficult to determine without more detailed research. However, it is likely that there is, as in France, a range of situations including privately owned subsidiaries and simple contractual relations.

Also as in France, there were a small number of non domestic processors selling under their own brand products processed in developing countries. This group included large Spanish companies such as Pescanova and Delfin.

7.3.3. Retailer brands

Of the 257 branded products, 33 carried a retail brand. In total, some 13 retail brands were identified for the 43 stores visited. The retail brands covered eight product categories with hake and tuna the most common categories.

Table 44 Italy: Retailer Brands and Product Categories

Group	Chain	Brand	Product Category
Auchan	Auchan	Auchan	Anchovies, Plaice
Carrefour	Carrefour	Carrefour	Hake, Mackerel, Sardine, Tuna
Carrefour	Carrefour	"1"	Anchovies, Mackerel
Carrefour	Di Per Di	Di Per Di	Hake, Tuna
Carrefour	GS	GS	Hake, Tuna
Conad	Conad	Conad	Hake
Coop	Coop	Coop	Hake, Seafood Cocktail
Pam	IN's	Surgel. del Veliero	Hake, Plaice
Lidl	Lidl	Nixe	Anchovies, Sardines, Tuna
Lidl	Lidl	Ocean Sea	Hake
Lidl	Lidl	Ocean Trader	Hake
Lidl	Lidl	Admiral	Hake
Metro	Metro	Aro	Tuna

*Name of buying office

7.4. **Store formats and banners**

As in France, results obtained by examining the range of DC products by retail chain can only be suggestive given the simple sampling methodology employed in collecting the data. Although it is not possible to conclude from the data that individual chains are more, or less, open to stocking DC products, it is interesting, nonetheless, to look at the variation in the number of DC products by retail format and retail chain.

The number of DC products varied between the different retail formats. As in France, the hypermarket format, with its emphasis on product range and competitive prices, accounted for an above average number of DC products. A relatively large number of DC products were also evident in the only cash & carry outlet visited while DC products were more likely to be found in discount rather than convenience stores.

Table 45 Italy: DC Products by Retail Format

Format	Stores Visited	DC Products
Hypermarkets	10	123
Supermarkets	18	142
Convenience Stores	5	17
Discount Stores	7	37
Cash & Carry	1	20

Differences are also apparent between individual retail chains with Carrefour group stores containing relatively large numbers of DC products compared, for example, with the Auchan group. However, it is not clear how much significance to attach to such differences as many of the products are sold under national Italian brands and it is possible that Italian chains regard the products as much local as developing country products.

Table 46 Italy: DC Products by Retail Group

Format	Group	Banner	Stores Visited	DC Products
Hypermarkets				
	Auchan	Auchan	3	30
	Carrefour	Carrefour	2	45
	Esselunga	Esselunga	2	31
	Coop	Ipercoop	2	44
	PAM	Panorama	1	23
Supermarkets				
	Auchan	SMA	1	14
	Carrefour	GS	2	31
	Coop	Coop	1	16
	Rewe	Standa	2	31
	Unes	U!	1	20
	Conad	Conad	5	24
	Superdi	Superdi	1	26
	Sidis	Ipersidis	1	20
		Gigante	1	
	Sisa	Sisa	1	14
	Auchan	Cityper	1	21
	Ce Di Gros	Sir	1	25
Convenience				
	Carrefour	Di per Di	1	4
	Auchan	Cityper	1	21
	Tuo / Despar	Despar	2	9
	Pam	Meta	1	3
	Auchan	Simply	1	9
Discount				
	Lidl	Lidl	1	7
	Conad	Todis	1	3
	Tuo / Despar	Tuo	2	6
	Rewe	Pennymarket	1	4
	Eurospin	Eurospin	2	9
	Pam	Ins	2	11
Cash & Carry				
	Metro	Metro	1	20

It is perhaps more interesting to look at which chains stock products from developing countries under the brand of the developing country producer or even under the brand of the retailer. As above, the Carrefour group chains (Carrefour hypermarkets, GS supermarkets) appear to carry an above average number of products under these categories but mainly under their own brands. This is also the case with the German discounter Lidl which sells a number of developing country products under its own brands. In general however, the Italian chains appear to carry very few products from these two categories (DC brands or retailer brands), a trend which reflects purchasing policies oriented towards domestic importers rather than direct imports by the chains themselves.

Table 47 Italy: DC Product Breakdown by Banner and Brand

Banner	DC Products under Retailer Brands	DC Products under DC Brands
Carrefour	6	3
GS	8	0
Di per Di	2	0
Auchan	1	0
Sma	1	1
Cityper	0	0
Simply	0	0
Ipercoop	4	1
Coop	0	1
Esselunga	0	0
Panorama	0	2
Standa	0	3
Ipersidis	0	0
Gigante	0	0
Sisa	0	0
Superdi	0	0
U !	0	0
Sir	0	1
Conad	1	2
Despar	0	0
Eurospin	0	5
Meta	0	0
Ins	3	1
Lidl	6	0
Todis	0	0
Tuo	0	1
Pennymarket	0	0
Metro	2	0

8. SUMMARY OF FINDINGS FOR France AND ITALY

8.1. Numbers of developing country products

A total of just under six hundred DC products were identified during the survey of French and Italian retail outlets. It was not possible, within the scope of the research, to determine what this figure represents in terms of the share of total branded seafood products in French and Italian outlets, but it is likely that it is less than 10%. A typical French or Italian hypermarket stocks around four hundred branded seafood products. While a significant proportion of this number can be found in many chains, stores also carry a range of products, such as private labels and products manufactured by regional producers, which are specific to individual chains. It is likely, although not documented, that the total number of retail branded seafood products runs into several thousands.

The share of DC products in specific product segments is likely to be well above the 10% level. This is probably the case in the preserved anchovy segment in the Italian market where there is a large number of products packed in Albania (and marketed under Italian brands). More generally, the number of DC products in the preserved product category may well be above 10% of the total number on sale in either the French or Italian markets.

A more useful measure of the importance of DC products is the share of total seafood sales. Such a measure would only be available through sales data provided by the chains. As such it was outside the scope of the present study.

In terms of countries, the survey results suggest that DC products are more likely to be found in French rather than Italian retail outlets. While a greater number of retail outlets were surveyed in Italy (43) compared to France (23), more DC products were noted in France (324) than in Italy (272). Just two products were common to both markets which gave a total of 594 different products.

8.2. Product presentation

Two thirds of the DC products surveyed were in canned or preserved form with most of the balance in frozen form. Chilled branded products accounted for less than 3% of the total.

Table 48 Product Breakdown by Presentation

Presentation	**France & Italy**	**%**
Preserved	398	66.8
Frozen	183	30.7
Chilled	15	2.5
Total	**596**	**100**

The larger number of DC products found in France is due largely to the much greater number of preserved (mainly canned) products noted in the country. In total, 238 preserved products were noted in French outlets compared to 160 products in Italy. On the other hand, more frozen and chilled products were noted in Italian outlets. In total, 99 frozen and 13 chilled products were surveyed in Italy compared to 84 and 2 respectively in France.

Table49 Product Breakdown by Country and Presentation

Presentation	**France**	**%**	**Italy**	**%**
Preserved	238	73	160	59
Frozen	84	26	99	36
Chilled	2	<1	13	5
Total	**324**	**100**	**272**	**100**

The larger number of DC preserved products in France may reflect differences between the French and Italian canning industries. The French industry has seen a decline in the number of canning operations and an increasing reliance on lower cost producing countries, particularly Morocco, over the past twenty years. The Italian industry has not undergone the same pace of transformation and continues to consist of a relatively larger number of domestic processors even if some of these companies have sub-contracted production to lower cost countries such as Albania and Morocco.

Not surprisingly, the surveys in both countries revealed very few chilled branded products originating in developing countries. Distance from the market is a significant constraint for perishable seafood products so the chilled pre-packed segment in retail outlets is dominated either by domestic companies or by suppliers based in neighbouring European countries.

It may be noted, however, that French and Italian retail outlets sell important volumes of chilled fillet products of developing country origin which are marketed in loose form, or packed in-store. Retail sales of Nile perch fillets produced in Kenya, Tanzania or Uganda along with pangasius fillets produced in Vietnam currently run to millions of euros each year in France and Italy. Unlike packaged seafood products, it is not possible, with current product labeling practices, to identify the producer of loose chilled fillet products. Typically, the country of origin indicated in retail chilled counters refers to the original origin of the whole fish rather than the origin of the filleted product. The focus of the present research was to identify processed products originating in developing countries which are present in European retail chains.

Chilled Shrimp

Chilled cooked whole vannamei shrimp has been one of the fastest growing product segments at retail level in the French seafood market in recent years. Typically, the product is farmed in South or Central America where it is harvested, frozen and exported to France. After de-frosting by French importer/processors, the product is cooked and packed in bulk for delivery to domestic retailers. The shrimp is usually sold loose on chilled seafood counters with the original country of origin (eg Brazil, Ecuador, Colombia etc) highlighted but with limited, if any, information provided to consumers on the local processor.

8.3. **Product categories**

The same product categories dominate the DC products surveyed in both countries. Tuna, anchovies, sardines, shrimp and crab account for over three quarters of the total products surveyed in France and almost 60% of the Italian products. All five categories are traditional seafood categories in both countries. The tuna, anchovy and sardine products were all in preserved format, mainly canned, while the shrimp products were mainly frozen with a small number in canned form. The crab products, essentially crab meat, were mainly canned.

The strong presence of tuna, anchovies and sardines in the DC product list reflects the shift in processing activity from local production in both France and Italy to low cost production and or strong supply sources in Eastern Europe, Africa and Asia.

Other categories which were common to both countries, but in smaller numbers, included cod, cuttlefish, hake, octopus, salmon, squid, surimi and whitebait. There were also a number of categories which were specific to one market such as Alaska pollock, lobster, mussels, ray and scallops in France and clams, mackerel, plaice and seabass and seabream in Italy. It is possible that a more comprehensive survey in both countries would have altered these lists although probably not the list of the five leading product categories noted above.

Seafood categories for which there were no DC products included those mainly sold in chilled or live form such as trout, turbot, and oysters. DC products from categories specific to northern European waters such as saithe were also less evident in the survey although Atlantic cod, which has been increasingly processed in Asia for re-export to Europe, was noted in both France and Italy.

8.4. **Country of origin**

Products from a total of thirty two developing countries were noted in the retail surveys. Products from the majority (19) of these countries were noted in both France and Italy. Among the more notable exceptions was Albania for which twenty eight products were noted but only in Italy. Products from

Colombia (12) were also only noted in Italy while products from Ghana (6) and Madagascar (4) were noted only in French outlets.

The importance of the Moroccan canning industry for European seafood markets was reflected in the strong position which products from Morocco had in the results. A total of 195 products from Morocco were noted in the surveys which meant that the country accounted for a third of the total number of DC products surveyed. It was also the number one country in both France and Italy. Moroccan products accounted for 40% of the total number in France and 24% of the total for Italy. The Moroccan product range consisted mainly of canned anchovies, mackerel and sardines but also included octopus, seafood cocktail and tuna products.

The most important Asian country, and second overall, in terms of DC products surveyed was Thailand with fifty three products, or almost 9% of the total. The strength of the Thai seafood industry is perhaps reflected in the relatively large range of product categories, eleven in total. This is the largest product range of any of the thirty two countries in the survey. More generally, Asian countries are prominent for having a relatively large product category range. A total of twenty eight products from China were noted covering ten product categories while a total of thirty seven products were noted for Vietnam covering seven product categories.

In sharp contrast to these three Asian countries is Côte d'Ivoire which was the third country in terms of products all of which, however, were in just one product category, tuna. Seychelles, Colombia, Ghana and Senegal were also part of the single product category (tuna) group.

The most important country for South America is Ecuador with seventeen products covering just two product categories: shrimp and tuna. Albania was the most important East European country in terms of product numbers at twenty eight covering three product categories, anchovies being by far the dominant of these.

Table 50 Origin of DC Products by Country and Product Categories

Country Total Products	France Products	Italy Products	Product Categories
Morocco **195**	129	66	Anchovies, cocktail, mackerel, octopus, sardines, tuna
Thailand **53**	32	21	Clams, cod, cocktail, crab, cuttlefish, octopus, red mullet, salmon, shrimp, squid, tuna
C. d'Ivoire **41**	23	18	Tuna
Vietnam **37**	24	13	Crab, octopus, seafood cocktail, pangasius, red mullet, shrimp, sole
Albania **28**	0	28	Anchovies, mackerel, sardines
China **27**	21	6	Pollock, cod, crab, dab, monk, salmon, shrimp, squid, surimi, whitebait
Poland **24**	4	20	Cod, hake, herring, plaice, salmon
Malaysia **19**	11	8	Crab, lobster, shrimp, squid
Ecuador **17**	8	9	Shrimp, tuna
Chile **16**	9	7	Crab, hake, mussels, salmon, scallops, urchins
Argentina **16**	9	7	Hake, ray
Seychelles **16**	14	2	Tuna
Uruguay **16**	1	15	Cuttlefish, hake, tuna
Colombia **12**	0	12	Tuna
Indonesia **10**	9	1	Crab, cuttlefish, shrimp
India **9**	7	2	Cuttlefish, shrimp, squid
Lithuania **9**	3	6	Crab, surimi
South Africa **7**	2	5	Hake, seafood cocktail
Ghana **6**	6	0	Tuna
Senegal **6**	3	3	Tuna
Turkey **6**	2	4	Anchovies, whitebait
Croatia **4**	0	4	Anchovies, seabass, seabream
Cuba **4**	0	4	Lobster, tuna
Madagascar **4**	4	0	Shrimp, tuna
Namibia **3**	0	3	Hake
Tunisia **3**	0	3	Shrimp, grouper
PNG **2**	1	1	Tuna
Costa Rica **1**	0	1	Tuna
Myanmar **1**	1	0	Shrimp
Pakistan **1**	0	1	Grouper
Philippines **1**	0	1	Tuna
Mauritius **1**	1	0	Tuna
Venezuela **1**	0	1	Shrimp
Countries 32 **Products 596**	**324**	**272**	

8.5. **Brands**

Of the 596 DC products noted during the surveys in France and Italy, 564 products were sold under the brand of a producer or distributor. The remaining thirty two products were on offer in packaging without a brand or without a reference to the producer or distributor. A total of 181 brands were noted which covered the 564 products. Of these 181 brands, 104, covering 310 products, belonged to producers or traders in developed countries. A further 39 brands, covering 155 products belonged to French or Italian retail chains while just 22 brands, covering 79 products, belonged to producers or distributors from developing countries. The ownership of the balance of 16 brands, covering 32 products, was uncertain.

Table 51 DC Products by Brands

Ownership of Brands (Number of brands)	**Products France**	**Products Italy**	**Products Total**
Developing Country Brands (22)	61	18	79
W. European Producer* / Importer Brands (104)	112	198	310
Retailer Brands (39)	122	33	155
Other brands unclassified (16)	12	8	20
Unbranded products	17	15	32
Total (181)	**324**	**272**	**596**

* includes multinationals

The relatively low number of developing country brands is striking although not very surprising. Brand development is generally an expensive process requiring resources and specialized marketing skills often not available to processors in developing countries. These companies can face significant hurdles in trying to establish a new brand particularly if it involves competition with large national brands which often have the advantage of a large product range.

The difficulties facing DC companies in establishing brands is perhaps highlighted by the fact that just two companies, La Monégasque and Pataya Food Industries/Nautilus, account for almost three quarters of the 79 products with DC owned brands. Excluding these companies and their products, leaves just over 20 DC products from the total sample.

A noticeable difference between France and Italy is the stronger presence of retailer brands (and a corresponding weaker presence of producer / trader brands) in France. The share of total brands accounted for by retailers in France was 37% compared to just 12% in Italy. Producer / trader brands from developed countries accounted for 34% of the total of 71 brands in France but 73% of the 110 brands in Italy.

The stronger presence of retailer brands in France may be attributed to the greater degree of concentration in the French retail sector. As noted earlier, the Italian retail sector is more fragmented with a larger number of smaller retailer chains than in France. In general, it appears that the larger the chain, the more economically attractive it is to invest in private label products.

Similarly, the larger number of producer/trader brands in Italy may point to a greater fragmentation of this industry sector in Italy compared to France. As noted, there has been a strong rationalization trend in the French seafood canning industry over the past twenty years which may be reflected in the smaller number of producer brands in the French survey. However, it is also striking to find a larger number of brands for individual producers or traders in Italy than in France. Seven brands were for example noted for Italian distributor, ICAT Foods while four brands were noted for the preserved seafood producer, Igino Mazzola. In contrast, in France it was more common to find a single brand for individual companies (Petit Navire, Saupiquet, Miceli, Vanelli etc).

Brands of large multinational companies from developed countries (such as Saupiquet in France or Rio Mare in Italy) accounted for less than 10% of the total number of DC products surveyed. At the same time, it is likely that this relatively modest figure does not reflect the importance of these companies in selling DC products in both France and Italy. This applies in particular to the key canned tuna market. Although not documented in the survey, it is likely that the multinational brands account for a relatively high proportion of *sales* in individual stores compared to local producer or importer brands. It is also possible that products which feature in the survey as retailer branded DC products are in many cases produced by the same multinational companies.

8.6. **Store formats**

The survey results in both countries point to the likely significance of hypermarket stores in stocking DC products. As noted earlier, this outcome is unsurprising given the greater product range found in hypermarkets compared to other retail formats. A similar result is suggested from the only cash & carry outlet surveyed. Hypermarkets and cash & carry chains typically share a policy of an extensive product range.

In terms of the smaller retail outlets, namely convenience and discount outlets, the survey results suggested that discount stores were more likely to stock DC products, and particularly DC products under retail brands.

Table 52 France and Italy: DC Products by Retail Format

Format	Stores Visited	DC Products
Hypermarkets	19	337
Supermarkets	25	247
Convenience Stores	7	31
Discount Stores	12	88
Cash & Carry	1	20

9. RETAIL ISSUES

9.1. **Value addition**

Although the study did not undertake systematic comparisons between developing country and developed country products, the level of value addition in DC products appears in general relatively simple to moderately complex compared to seafood products manufactured in developed countries.

One of the most striking features is the absence of prepared seafood dishes in the DC range. The prepared segment is now one of the most important in the seafood range of European retail chains. The segment is evident in chilled, frozen and prepared seafood categories and involves combinations of seafood products and or seafood products involving sauces and vegetables combinations.

In recent years, the prepared seafood segment has seen significant growth in the preserved category and particularly in the tuna category where there has been a strong increase in the range of products involving vegetable combinations. These new products have benefited from developments in packaging involving the use of pouches and of aluminium material. The current survey revealed a range of traditional canned tuna products involving simple presentations in oil or brine. This range appeared focused on price rather than value addition in contrast to the expanding range of prepared tuna products which are produced almost exclusively in developed countries.

The level of value addition is somewhat higher in the preserved anchovy segment which includes a range of anchovy fillet products in a variety of sauces. In contrast to tuna, this range, which also included several anchovy paste products, appears to be in line with anchovy products currently produced in developed countries which have not seen the same level of innovation as found in the tuna segment. Value addition efforts were also evident in the canned sardine segment which included several preparations with sauces. However, canned sardine products in developed countries appear more value oriented with an emphasis on fillets and on labeling and packaging variations.

DC prepared dishes are also absent from the frozen category despite the importance of this segment in both France and Italy. DC frozen shrimp products are, however, comparable with many shrimp products produced (or repacked) in developed countries which are relatively simple involving whole frozen, shell-on tails or peeled products. Frozen DC groundfish products include fillet products as well as the more simple h&g products.

As noted earlier, there were very few DC products in the chilled category. Developing countries have not, therefore, participated in the strong growth of chilled value added products, particularly in the shrimp and salmon categories, in recent years.

9.2. **Product certification and labeling**

In line with developments in consumer food products generally, there has been an increase in product certification and labeling in European seafood markets in recent years. Certification has covered several broad areas including quality, organic production, environment and origin. In general, producers have regarded certification as a means to add value and / or to achieve other commercial objectives, such as customer loyalty.

Seafood certification, and related consumer labels, are increasingly evident in European retail markets. These labels often relate to niche markets which generate price premiums for the products concerned. The French quality label, Label Rouge, is recognized by French consumers as an indication of quality and tends to sell at a premium above prices for standard products in the same segment. Similarly, the French *Agriculture Biologique* (AB) label is seen as a guarantee of organic production (in both agriculture and aquaculture) and typically generates an above average price for producers. The Marine Stewardship Council eco label helps to position a product in a niche segment although the benefits to a producer may be more at the business to business level rather than at consumer level.

The limited evidence of the current survey suggests that developing countries have yet to exploit the benefits from value addition gains associated with product certification. None of the well known certification labels mentioned above were noted on any of the products surveyed. At the same time, it may be noted that press reports have referred to organic certification for several DC products such as shrimp from Madagascar, Vietnam and Brazil in European markets. In addition, DC products in European markets have benefited from a form of eco certification represented by dolphin friendly labels (although it is unlikely that this label constitutes a distinct market segment for which consumers are prepared to pay a premium).

10. IMPLICATIONS FOR DEVELOPING COUNTRY EXPORTERS

The main focus of the current research is the presence of processed DC products in European retail chains. France and Italy were chosen as sample markets to examine which DC products are currently sold in the main retail chains in these countries. Underlying the research is the importance of retail chains in seafood distribution in most, if not all, consumer markets. Key areas of interest include the potential and difficulties facing DC exporters in supplying European retail markets today.

10.1. **Key questions to consider:**

Are European retail chains selling DC processed seafood products ?
If so, does the existing range provide indications about the potential, or lack of potential, for DC exporters with European retail chains ?
Do DC exporters have, for example, competitive advantages or disadvantages in supplying European retail chains ?
What strategy elements should be taken into account by potential exporters ?

Are DC processed seafood products on sale in European retail chains ?
The survey noted almost 600 processed DC seafood products in almost seventy outlets in France and Italy. The survey therefore confirmed that DC products were well integrated into the retail sales pattern of the two countries under review. At the same time, it is clear that a percentage of DC products are manufactured by multinational companies which have transferred production to developing countries to avail of cost economies in these countries. Whether products manufactured by these companies can be considered to be developing country products is debatable. In either case, it is useful to distinguish between this category of products and those which are manufactured by domestic / indigenous developing country producers.

It is also likely that DC products account for a relatively small percentage of total retail sales of processed seafood. Although the surveys did not attempt to estimate the total number of processed seafood products on sale in French and Italian retail outlets, it is likely that DC products account for less than 10% of this number. This percentage varies according to product category with, for example, a low percentage for chilled products and a higher percentage for preserved products. The percentage also varies significantly for individual product categories with, for example, a relatively low percentage for processed salmon products and a relatively high one for preserved anchovy products.

Does the existing DC product range provide indications about the potential, or lack of potential, for DC exporters with European retail chains ?
The survey found DC products well represented in certain product segments such as canned sardines, anchovies and tuna along with frozen shrimps but under represented in many other segments but particularly in chilled seafood and prepared dishes. The presence or absence of DC products in specific segments generally reflects basic strengths or weaknesses of DC exporters in relation to producers in European markets. These strengths or weaknesses are often determining factors in relation to the success or failure of DC exporters in the markets themselves irrespective of the distribution structure, that is whether through retail chains or through wholesalers and catering establishments.

The case of Morocco, which features as the most important country supplying products to French and Italian retail chains illustrates a number of key competitive advantages.

Competitive advantages

- Raw material supply: Morocco's resource situation regarding sardines and, to a lesser extent, anchovies means that it is in a strong position to supply on a regular, continuous basis, a product with strong demand potential on European retail shelves.
- Competitive cost structure: Morocco's seafood canning industry enjoys a competitive cost structure. The heavier cost structure for the French industry is reflected both in a steady decline in the number of French canning operations over the past twenty to thirty years and a steady increase in canned fish imports from Morocco during this period.

- Industry scale and critical mass: the Moroccan seafood canning industry appears to have reached a critical mass in relation to several variables including infrastructure, state support, skills pool which allows it to compete effectively in international trade. This characteristic is also evident in Thailand, the developing country with the largest product range in the survey.
- Proximity to market: Morocco's proximity to southern Europe and its close cultural and historical ties with France gives it an advantage in establishing effective working relationships with European customers.

Competitive disadvantages

Competitive disadvantages which handicap DC exporters in selling to European retail chains, as well as more generally to European markets, include:

- Distance from the market: the absence of DC products in the chilled segment underlines the importance of close market proximity for this segment. Unless volumes are large with steady availability (Nile perch, Namibian hake), exporters in developing countries will generally have a problem with access to appropriate groupage facilities.
- Product development capacity: as noted earlier, DC products surveyed tended to be at a relatively simple level of value addition. DC products were almost absent from key growth areas involving prepared seafood dishes. Reasons for the absence of DC products from this segment require further research but factors such as resource and skills constraints, more complex sanitary requirements and the absence of established brands from developing countries may be relevant.
- Product range: Many of the large national distributors supplying retail chains in both France and Spain market a wide product range which is often sourced from around the world. Typically, the product range of exporters in developing countries is more limited and as such is at a certain disadvantage with retail buyers who are often oriented to dealing with a relatively small number of suppliers who provide the bulk of their product requirements.
- Weaker capacity (capital, skills, local market knowledge) in relation to product safety issues in particular and, more generally, towards compliance with private standards.

10.2. **Strategy considerations regarding potential for developing country exporters**

- The findings of the present research suggest, not surprisingly, that cost is a key competitive advantage enjoyed by exporters in developing countries. Many of the DC products surveyed involved relatively basic processing technology and relatively uncomplicated presentations. Indications of more advanced value addition involving, for example, recipe preparations were generally absent in the survey. At the same time, for certain market segments, the cost advantage will often outweigh the various disadvantages. DC exporters suffer such as distance from the market or weakness in r&d capability.

- Regular availability of raw materials in significant quantities is often, but not always, a key condition in supplying European retail chains. As the case of China confirms, however, local raw material availability is not a necessary condition for exporting to developed markets. Chinese exporters are often dependent on imported raw material for re-processing and re-export.

- The survey results suggest that the more common distribution approach for DC exporters in selling to the retail chains is to distribute through importers or producers already present in the market rather than direct sales to the chains. Passing through local distributors has the advantage of using local knowledge, an existing contact network and an established physical distribution system. As such, it should typically involve a lower marketing outlay for exporters which is an advantage for smaller exporters and / or for exporters trying to develop various markets simultaneously. For these companies, the identification of a suitable distributor in the export market is a key priority. In terms of sales to retail chains, a key criterion is the track record and experience of the distributor with national retail chains.

- Related to the distribution issue, is the question of branding. The survey found very few examples of DC brands in French or Italian supermarkets. In general, DC products are being sold in these supermarkets under the brands of EU importers and producers, multinationals or retail chains.

This approach makes sense for many exporters, particularly for those without the resources to invest in brand development. Establishing a brand in a particular market is typically an expensive and risky exercise especially for exporters with limited resources and with limited experience of the target market. It is noteworthy that the most prevalent DC brand surveyed, La Monagasque, was owned, at least at the time of the survey, by a large conglomerate, ONA, and has been developed over a number of years by an organization (now a subsidiary of ONA) based in the French market.

It is also interesting to note the absence of brands on several DC products in both France and Italy. Selling unbranded products may be seen as a short or medium term option for some DC exporters lacking the experience or resources to develop a brand in a developed country market.

- For exporters focusing on supplying retail chains directly under the brand of the chain, the survey results suggest that certain chains may be more open to purchasing products from developing countries than others. The larger international chains, such as Carrefour, appear to be more open to selling DC products than smaller regional chains particularly those found in the more fragmented Italian market and which are more oriented to sourcing from local importers and producers. In general, it looks as if retail chains in France are more likely to stock products from developing countries than retail chains in the Italian market. French retail groups marketing relatively large numbers of DC products under their own brands included Casino and Cora while groups marketing DC brands included Casino and Leclerc. At the same time, the limited scope of the study does not allow any definite conclusions regarding the openness of individual chains to approaches from exporters in developing countries.

APPENDIX 1 : RETAIL DEFINITIONS

1. Retail Formats:
Hypermarkets: outlets with a floor area over 2 500 m². Typically, hypermarket areas range between 5 and 12 000 m² with areas for the biggest stores around 20 000 m²

Supermarkets: outlets with a floor area of between 400 and 2 500 m²

Convenience Stores: outlets with a store area of between 120 and 400 m²

Discount Stores: outlets with a floor area of between 400 and 800 m². Discount stores focus on a limited product range, high volumes, low prices and a minimum service shopping environment.

Cash & Carry: Cash & Carry outlets are not in fact retail outlets but a type of self service wholesale operation with restricted access aimed at independent retailers and restaurants. Store size is often similar to that of a large hypermarket.

2. Retail Banners:
A store banner is the brand or name of the store. Retail groups often use multiple banners depending on whether the store is a hypermarket, supermarket, convenience store etc. In France, for example, Carrefour uses the "Carrefour" banner for its hypermarkets, the "Champion" banner for its supermarkets, the "8 à huit" banner for its convenience stores and the "Ed" banner for its discount outlets. The company plans to phase out the "Champion" banner replacing it with that of "Carrefour".

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