

# Consequences of the crisis in French oyster culture sector on the domestic market

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# Crassostrea gigas- Spat production and culture techniques

Pocket culture on tables



Sur la côte Ouest du Cotentin, de Saint-Vaast la Hougue à Isigny sur mer, jusqu'à la frontière belge



**N°1 aquaculture species**

Entre Baie de Bourgneuf et Baie de l'Aiguillon. L'île de Noirmoutier

De l'île de Ré à la région M en passant par



Natural spat

Le bassin d'Arcachon et le lac d'Hossegor



Suspended culture under racks



Hatchery

Les bassins de Thau et Leucate, le Golfe du Lion et la Corse

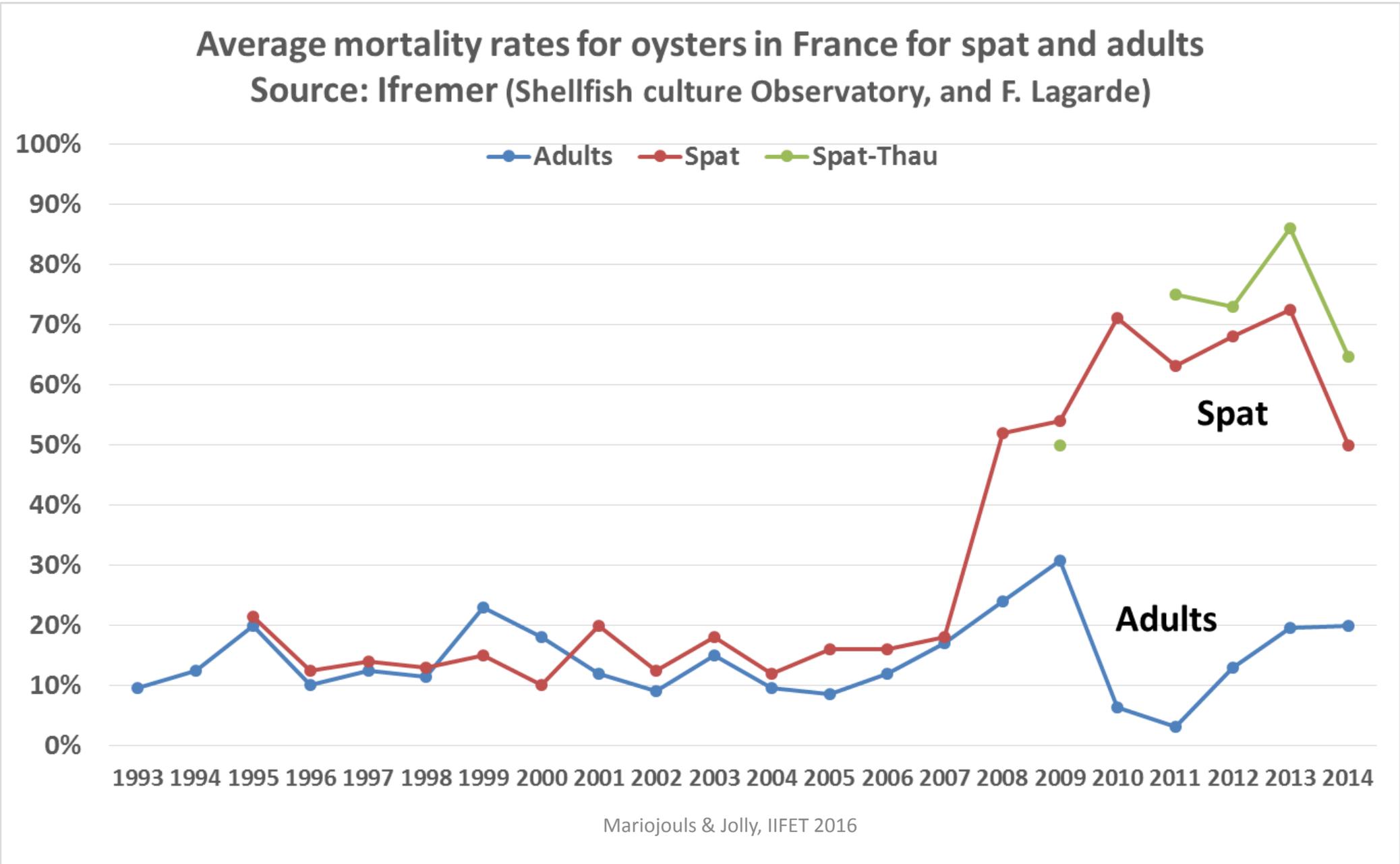
# Introduction

- Oyster in France: in production, the first species in fisheries & aquaculture in value and 3rd in volume; consumption by households 2nd or 3rd species in quantity
- A crisis in the oyster sector, due to spat mortalities :
  - Already striking spat during summer, for years
  - since 2008, rising mortality rates (up to 75%, 2010-13) due to high virulence of Ostreid Herpes Virus 1  $\mu$ var (OsHV1 $\mu$ var)
  - + mortality of adults since 2013
- Serious socio-economic consequences for oyster farmers (particularly studied by Girard & Perez, 2011 and 2014), despite public subsidies & farmers adaptation strategies

Number of companies has declined: from 1957 in 2008 to 1695 in 2011 (lowest) before recovering slightly. A concentration phenomenon while culture areas were not reduced.

- As the French market is traditionally essentially supplied by domestic production, a significant supply deficit
- Objective of this work: to examine the impact on the market, through an analysis of available statistical data

# A crisis since 2008, with over-mortalities of spat (+ mortalities of adults)



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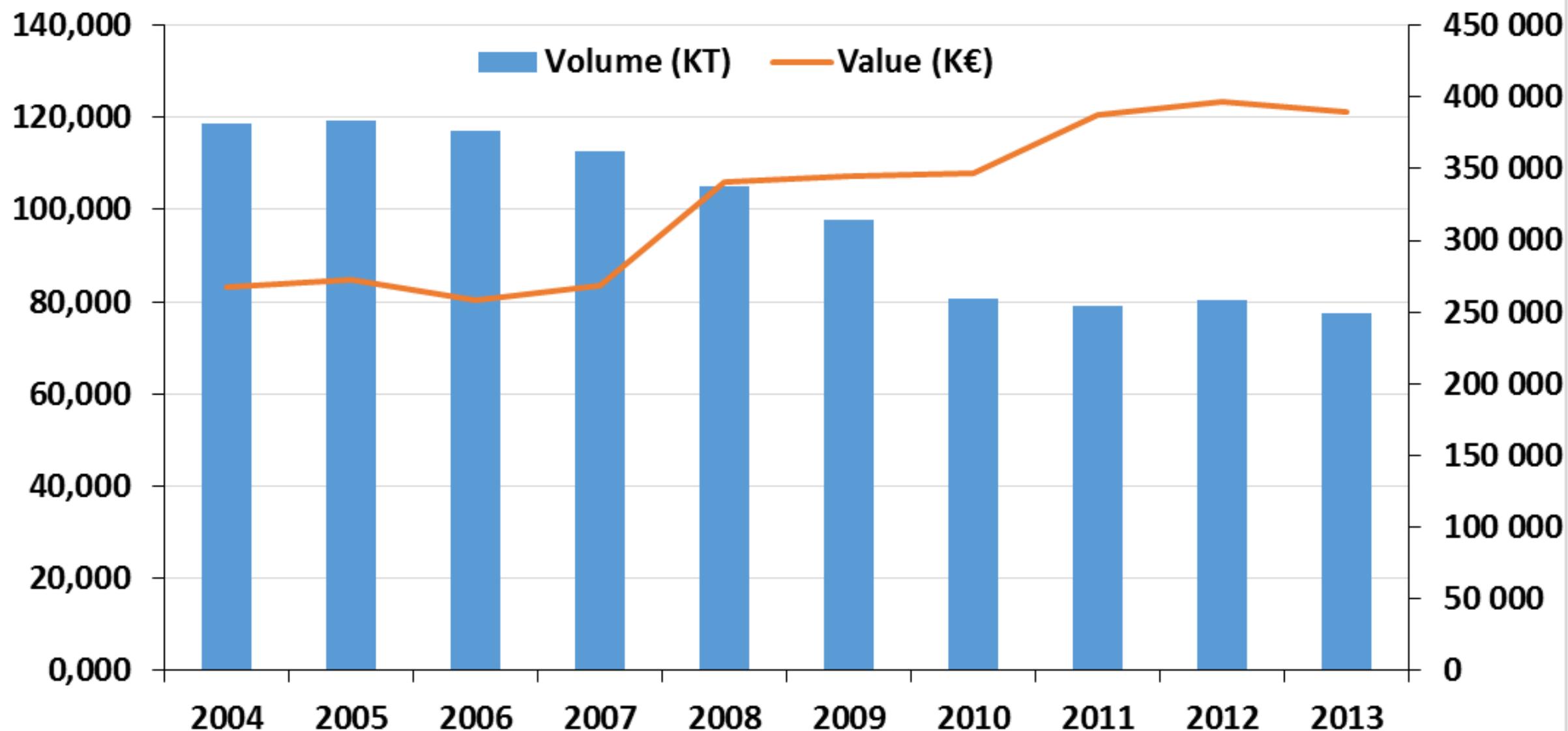
# Outline

- Trends in production, external trade, consumption
- Trends in prices
- Changes in distribution channels
- Analysis of the market segments, according to oyster size
- Consumers behaviour
- Conclusion

Trends in production, external  
trade, consumption

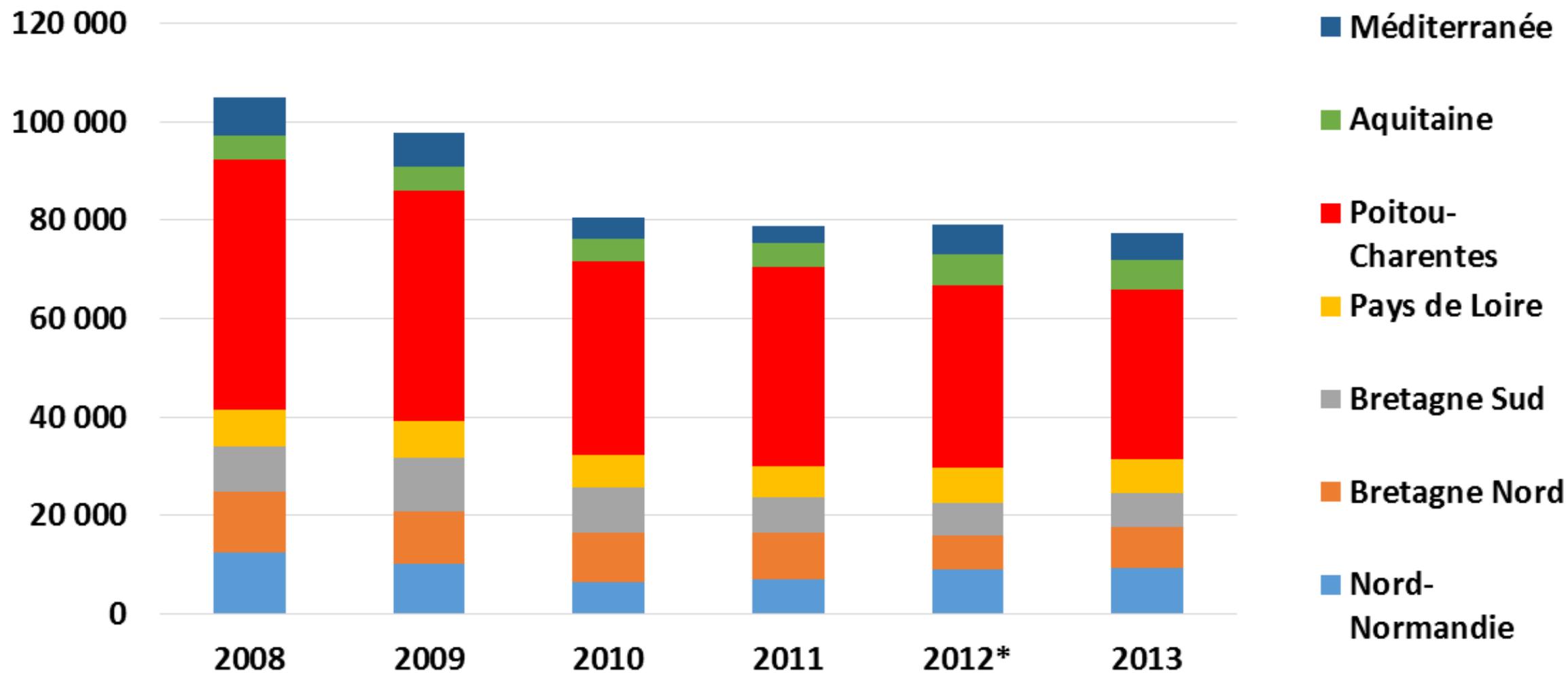
# Oyster production in France, in volume & value

Source : Eurostat after DPMA (French Directorate for Fisheries and Aquaculture)



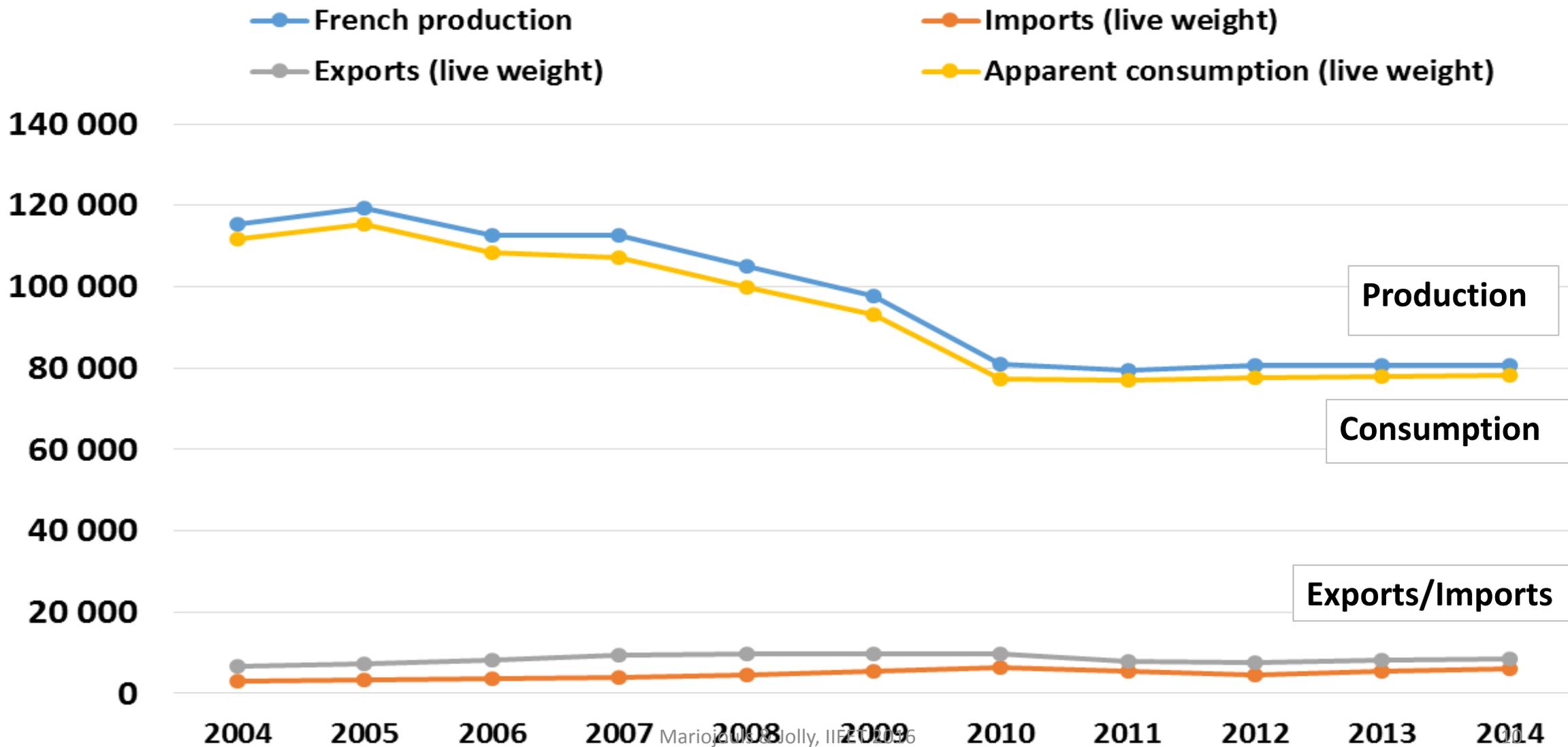
# Sales of cupped oysters for consumption (T), by region

Sources: DPMA, \*Agreste Primeur 316

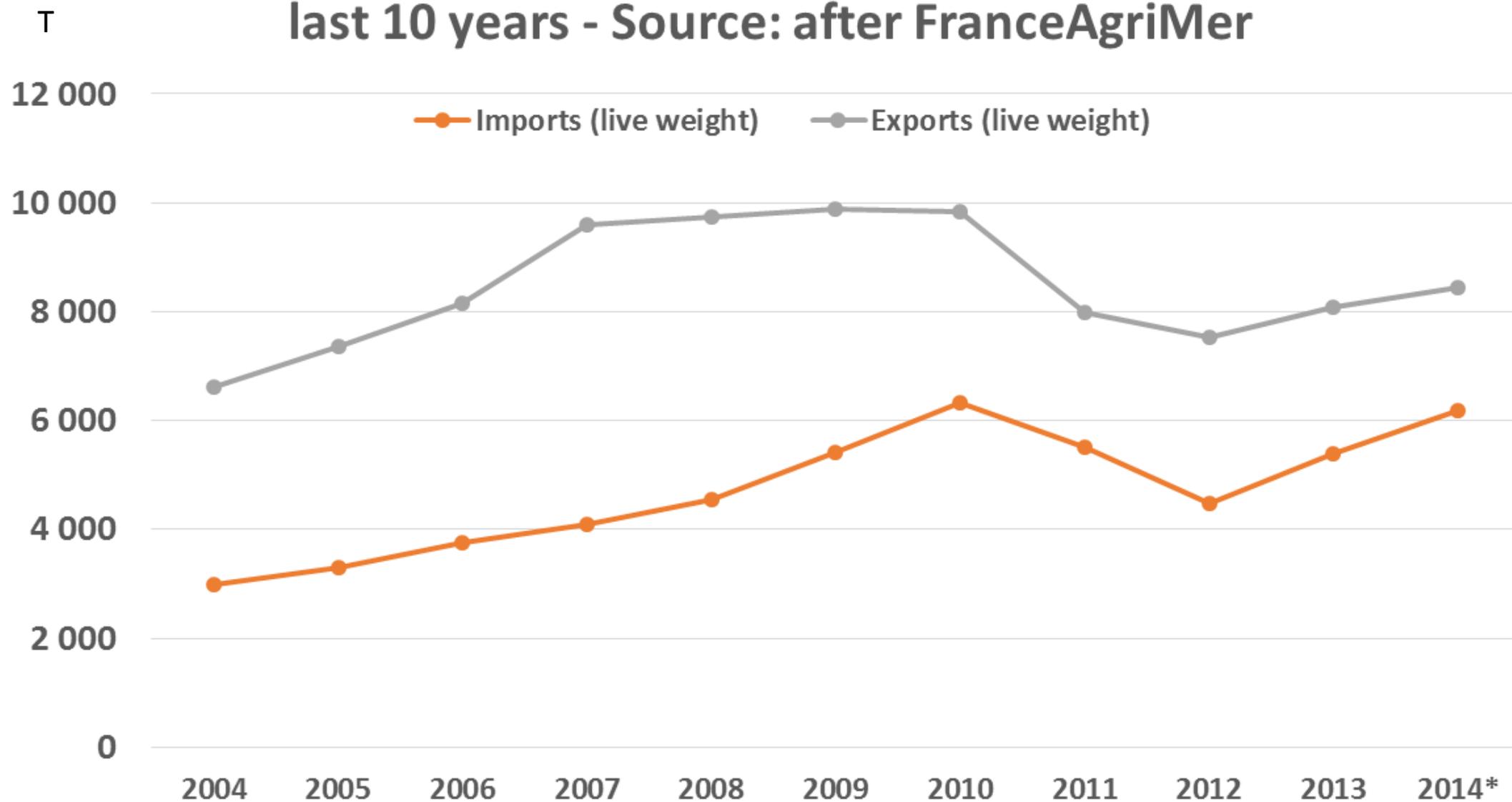


# Changes in French market over last 10 years

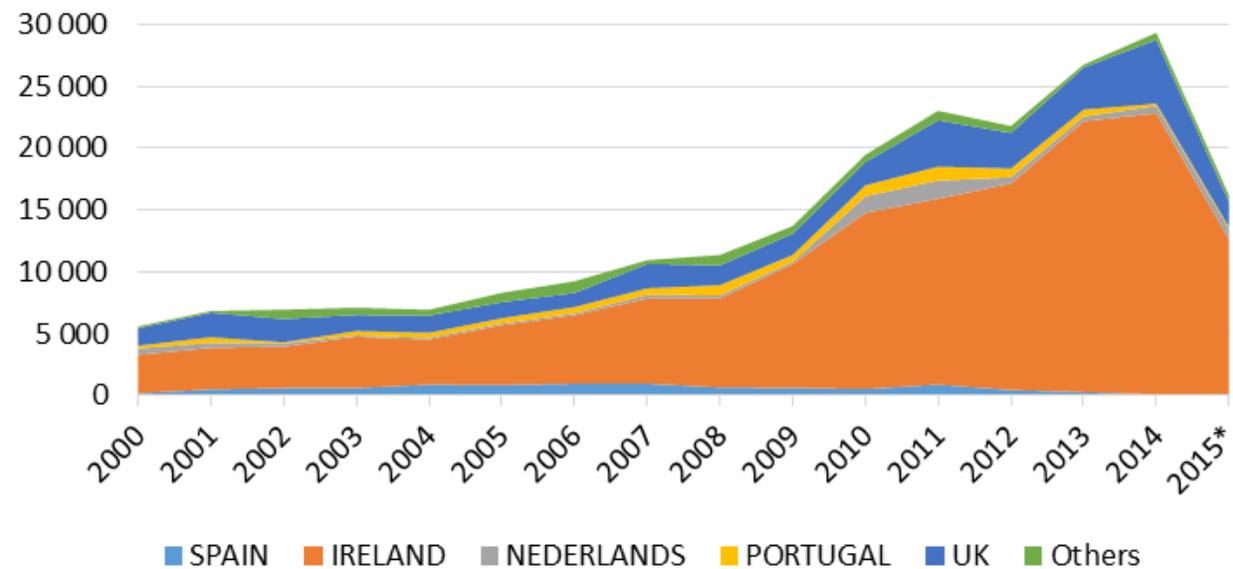
Source: after FranceAgriMer



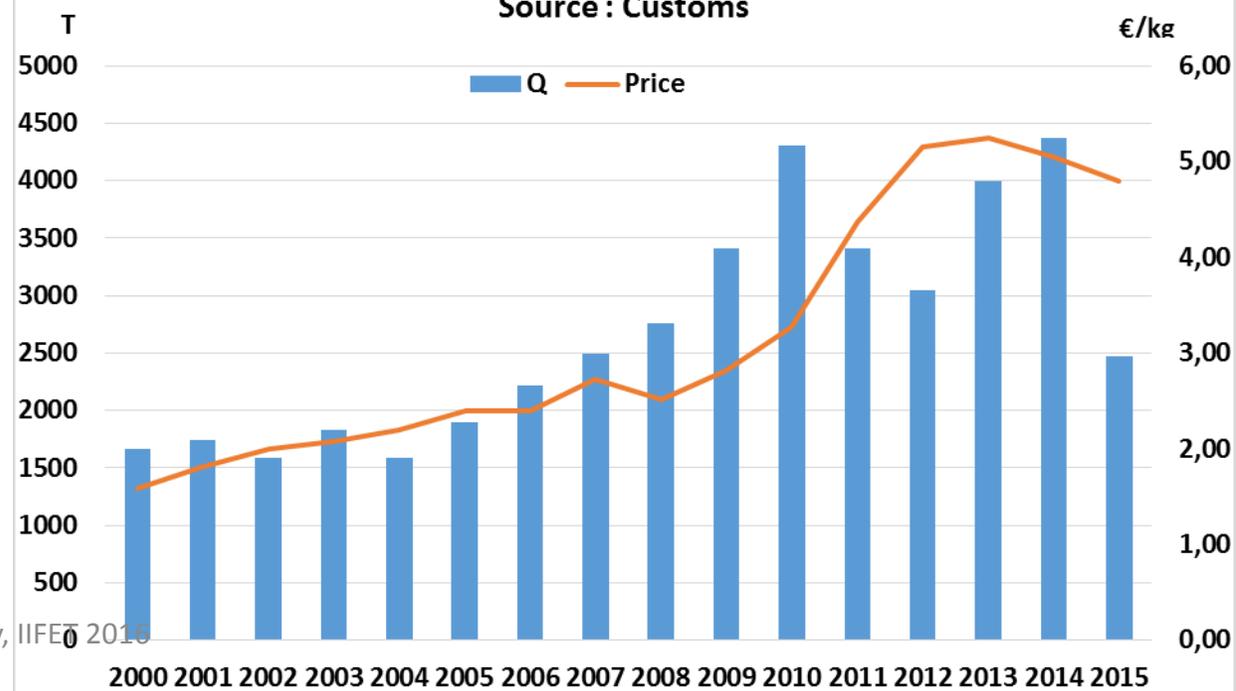
# Changes in external trade of oysters in France over last 10 years - Source: after FranceAgriMer



Total imports (K€) of oysters in France, from main suppliers - Source: Customs



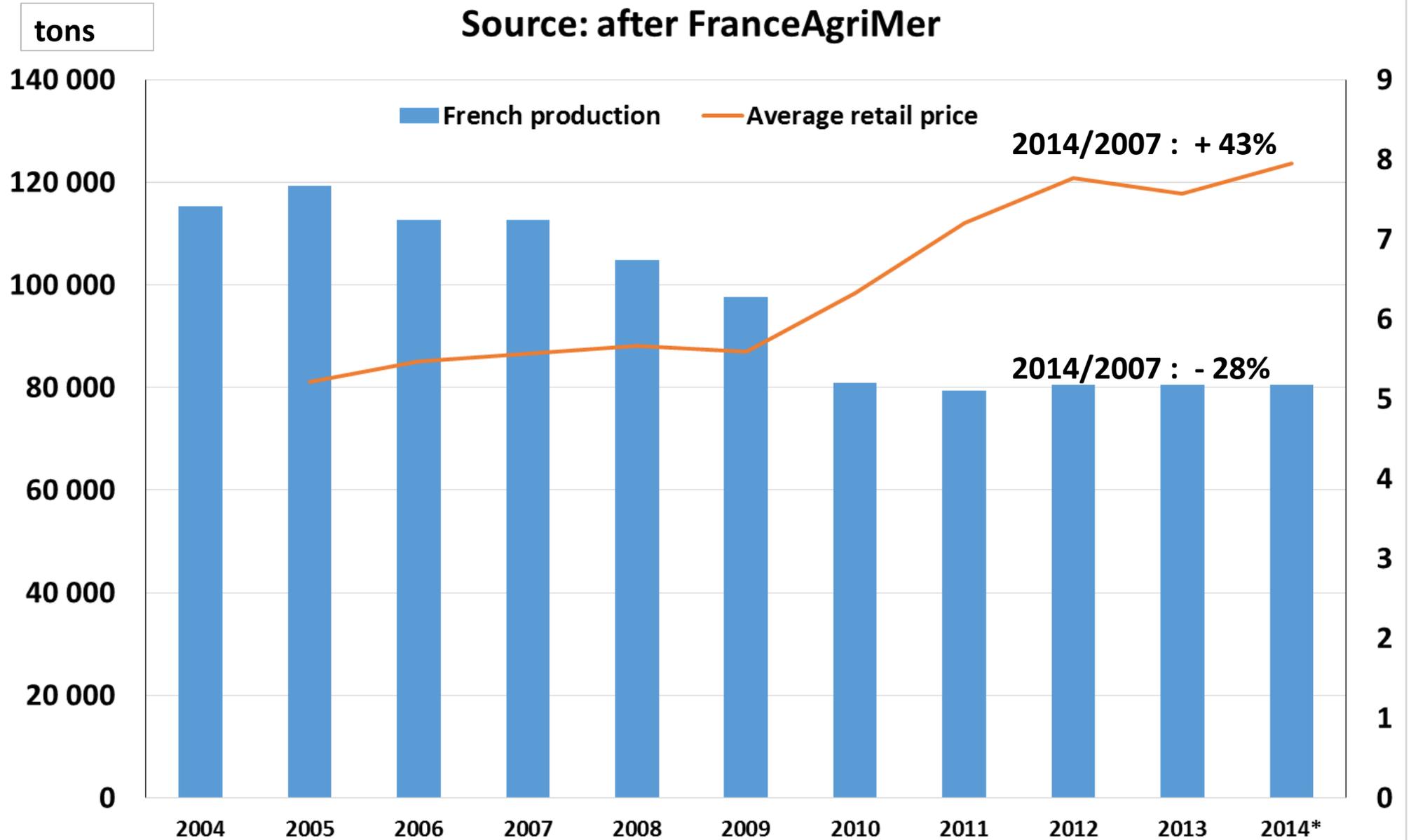
Imports from Ireland to France: quantity and average price - Source : Customs



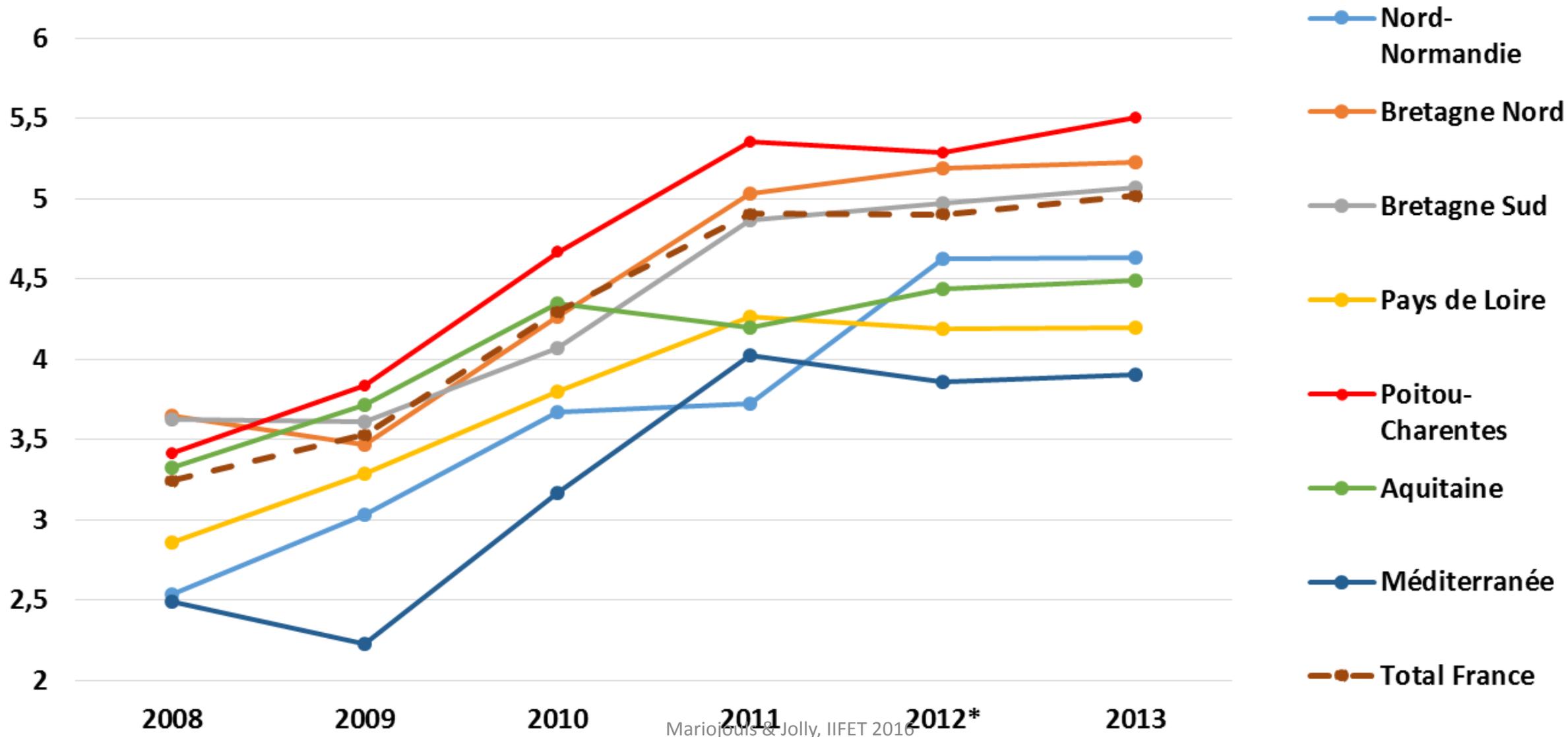
# Trends in prices

# Domestic production and retail price of oysters in France

Source: after FranceAgriMer



# Average price (€/kg) of cupped oysters at packing plant gate, by region - Sources : DPMA (Fisheries Agency); \*after Agreste CDA 226



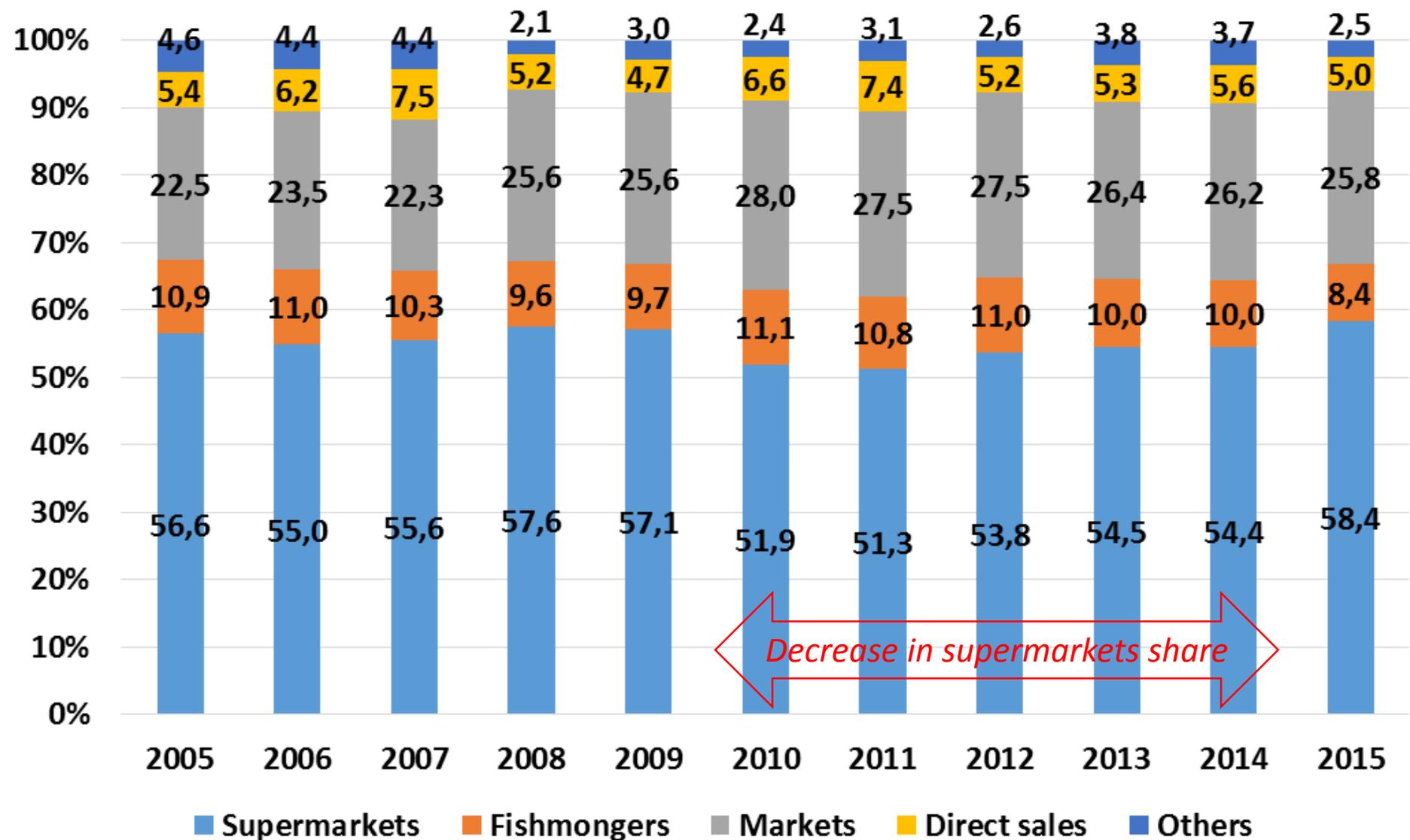
# Changes in distribution channels

# Consumers panel survey by Kantar World panel

- 20 000 households representatives of French households
  - All outlets are followed: supermarkets, markets, on-line, drive, discount, fishmongers, direct sales, etc...
  - Based on declarations of panelists:
    - Scanning for products with bare-code
    - Questionnaire for other products
-  → **Limits**: under-declaration for some purchases, like oysters direct sales
- **At home consumption only**

 Excluded: holidays  
→ important **limits for the oyster market**

## Changes in share of retail outlets (quantity) for households purchases of oysters - Source: Kantar World Panel for FranceAgriMer

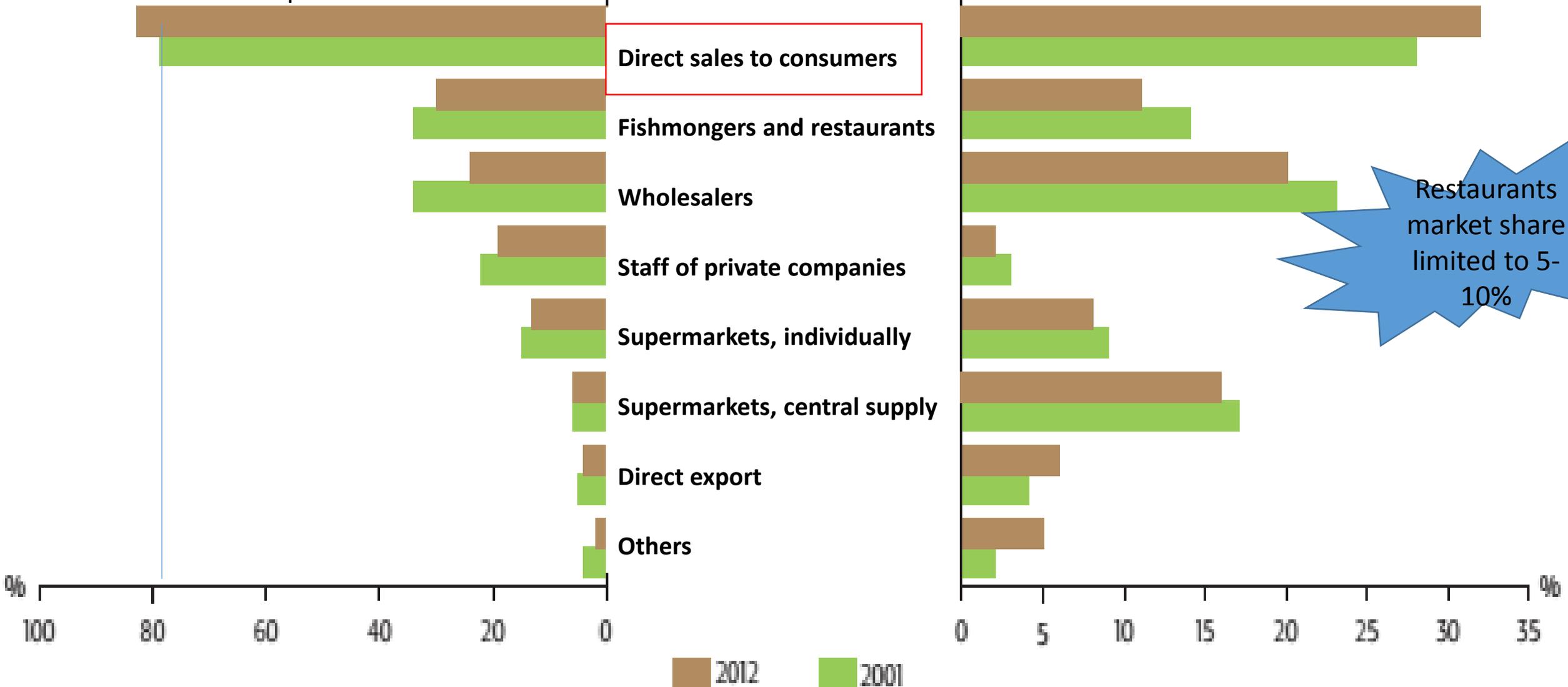


# Outlet channels in oyster companies, in 2001 and 2012

Source: French Min. Agric., Agreste Primeur 316, Jul 2014

Share of companies

Share of sales

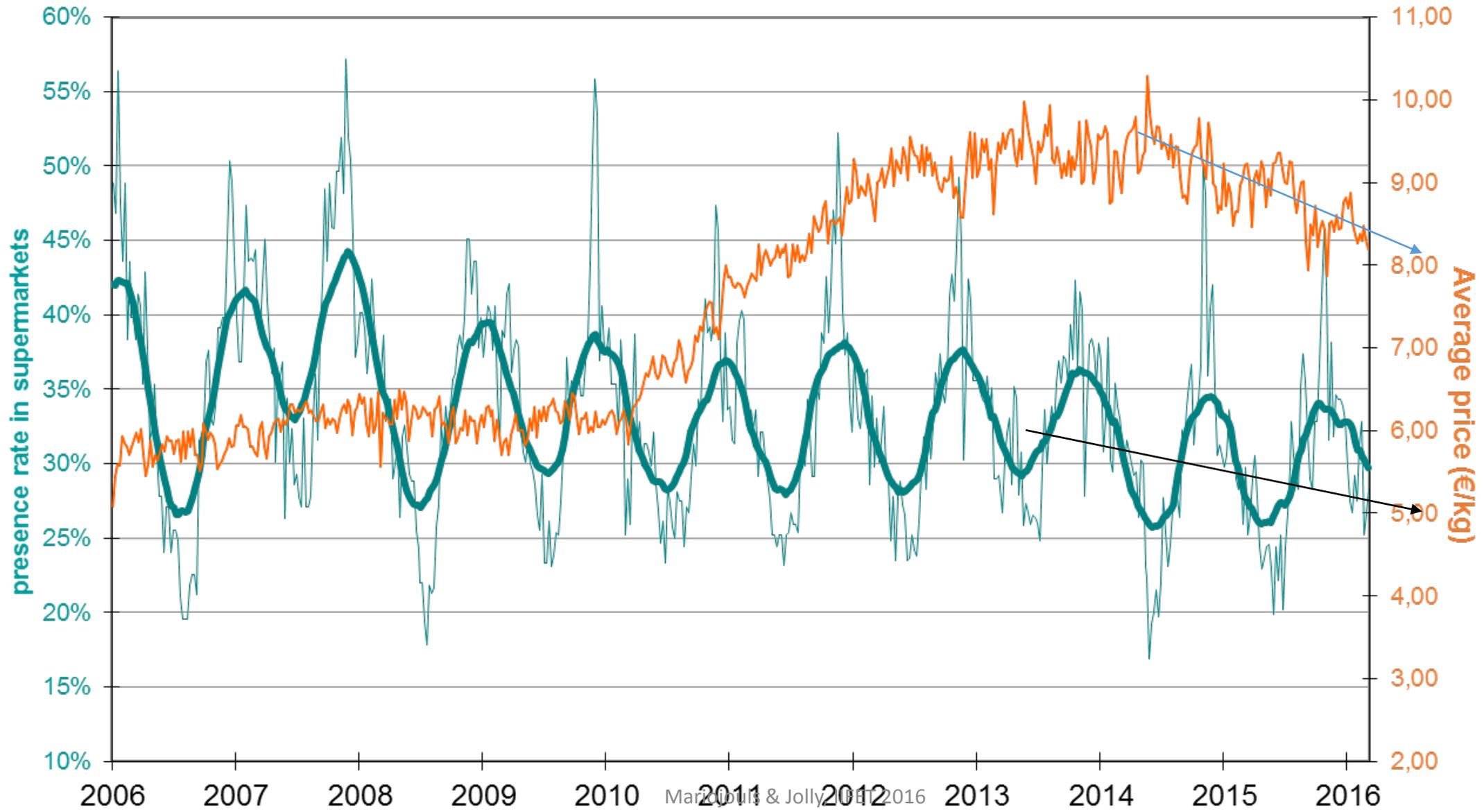


Restaurants market share limited to 5-10%

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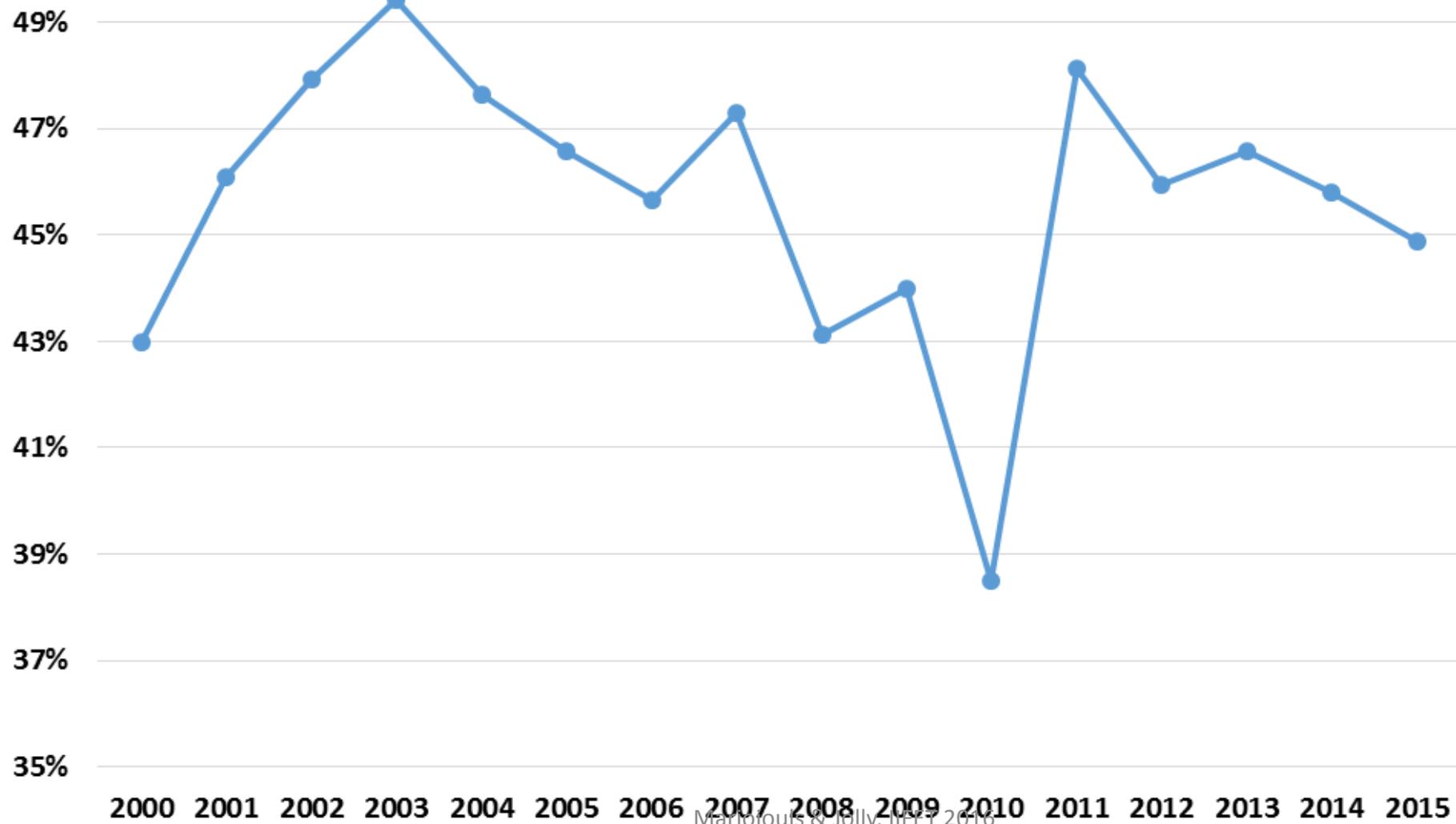
Source: Recensement général de la conchyliculture, Agreste n°316, Jul 2014

# Trends in presence rate in supermarkets and average retail price in supermarkets, for oysters in France - Source: FranceAgriMer & RNM



# Share of oysters sales to households in December

Source Kantar World Panel for FranceAgriMer

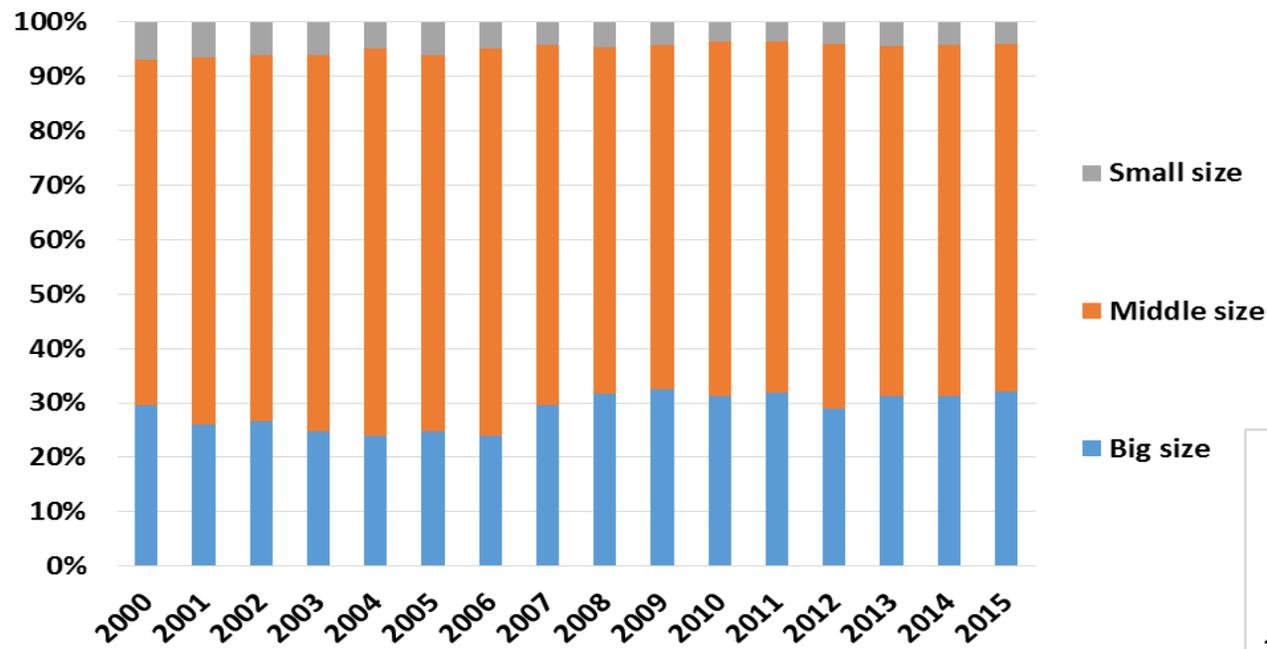


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# Analysis of the market segments, according to oyster size

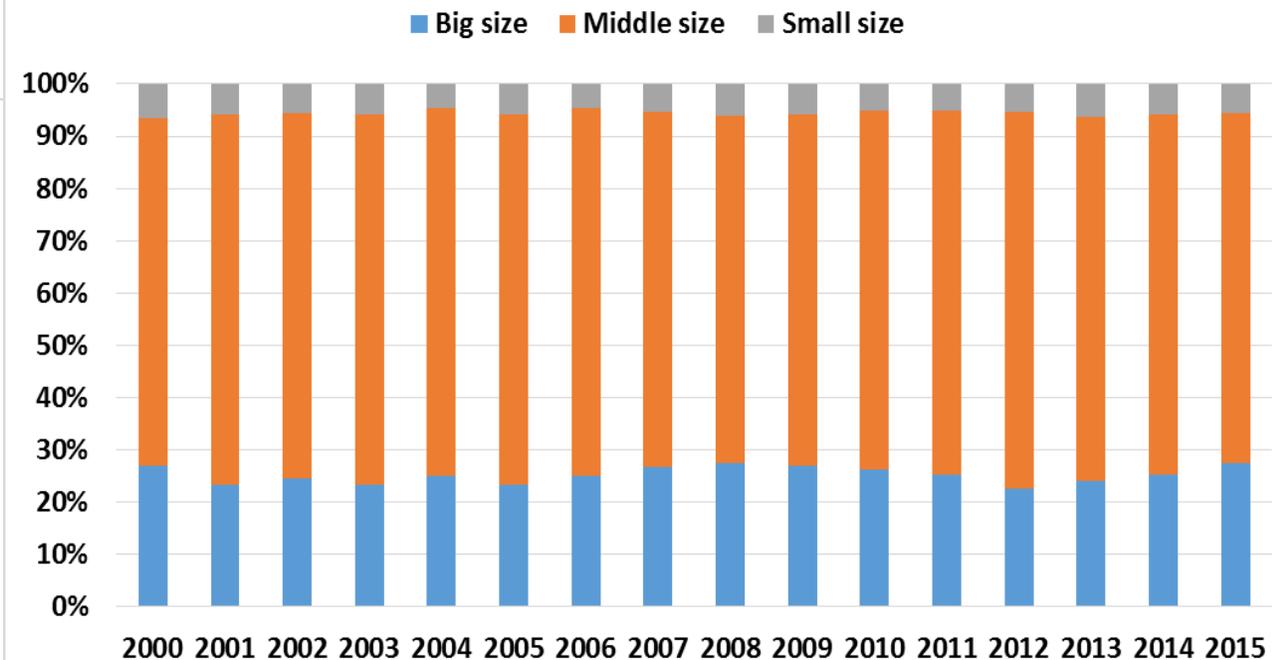
### Market share in quantity, by size of cupped oysters

Source: Kantar, FranceAgriMer



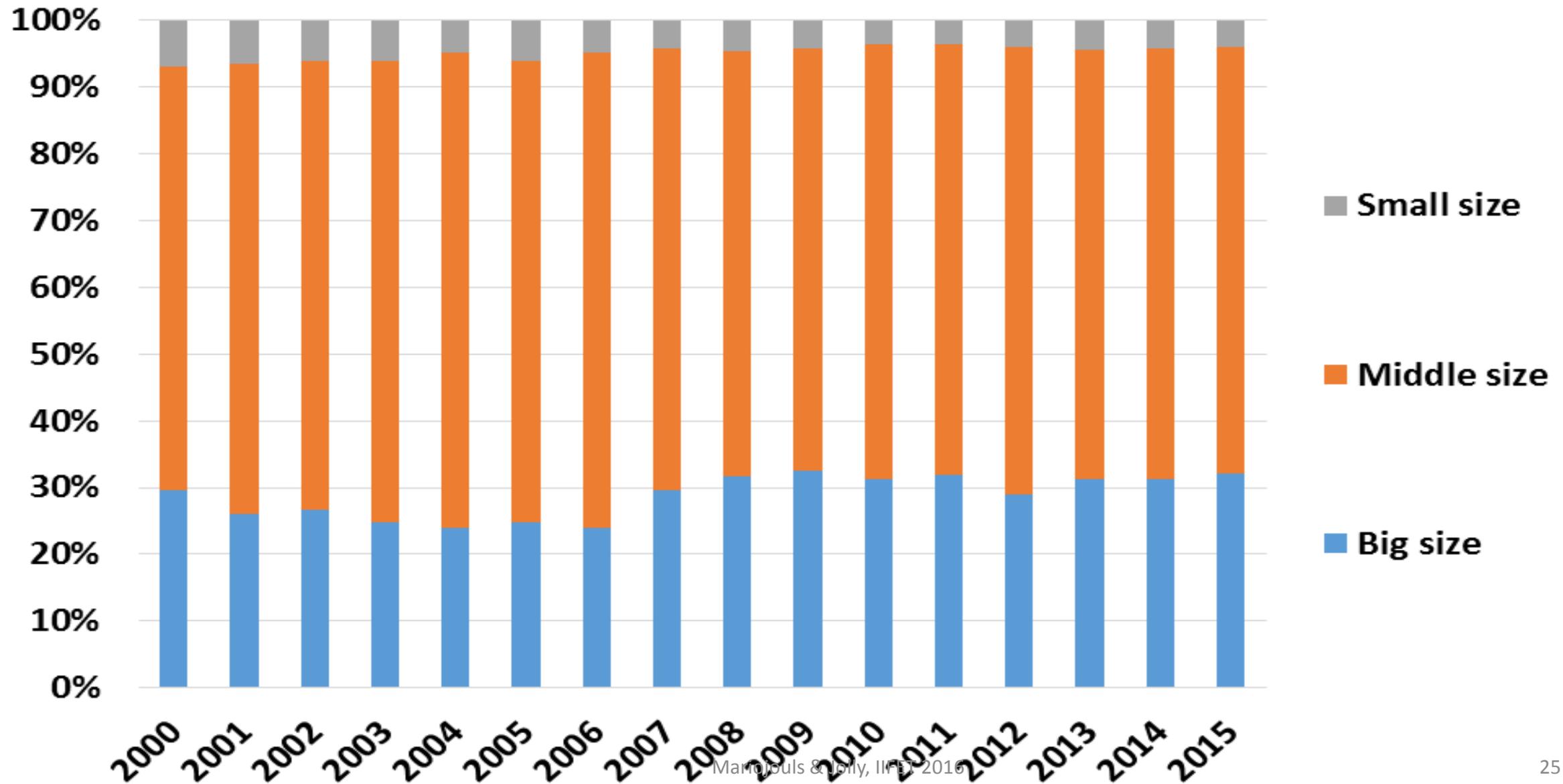
### Market share in value for cupped oysters, by size

Sources: Kantar, FranceAgriMer

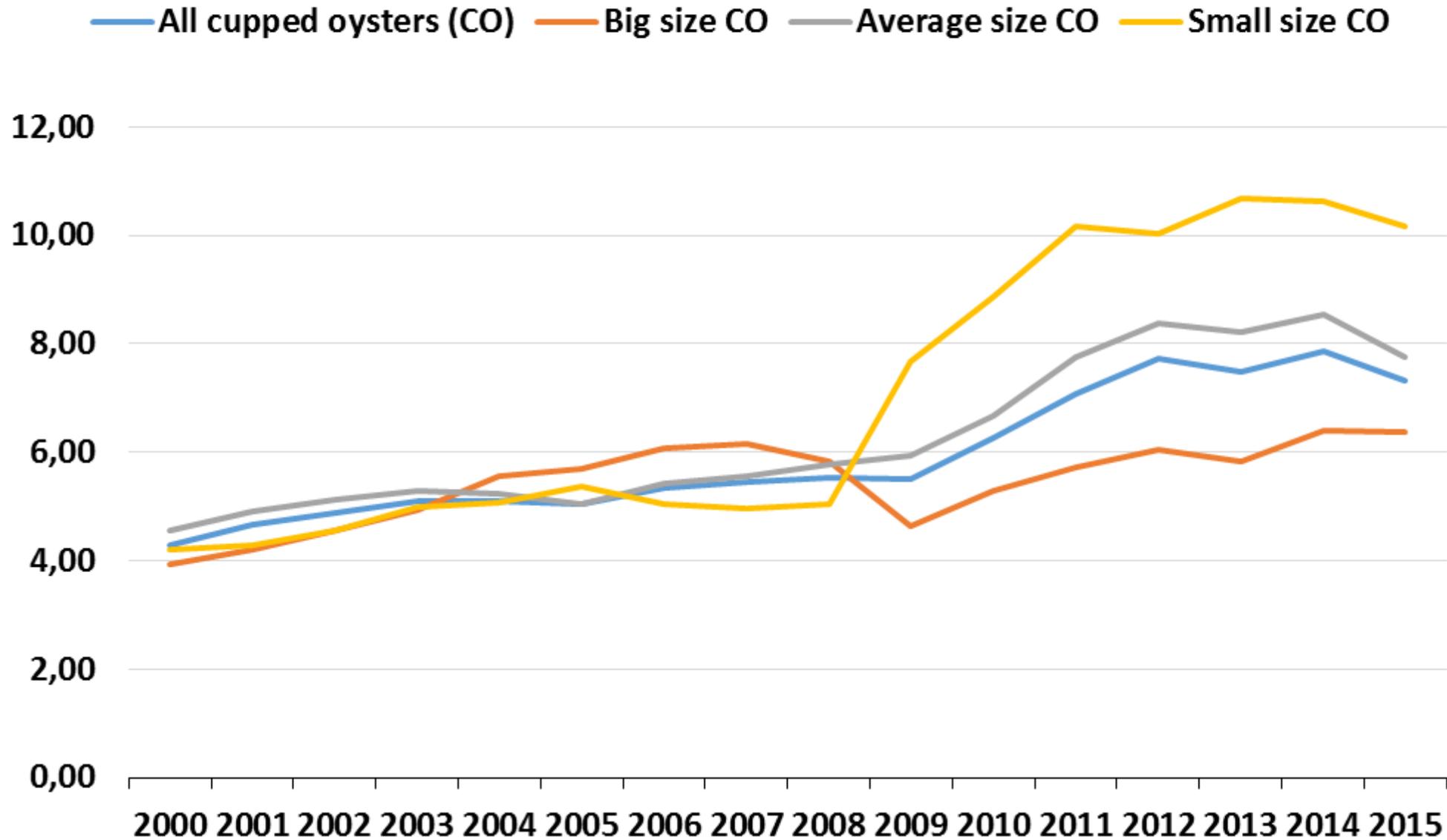


# Market share in quantity, by size of cupped oysters

Source: Kantar, FranceAgriMer



## Changes in average retail prices (€/kg) of cupped oysters according to size - Source: after Kantar & FranceAgriMer

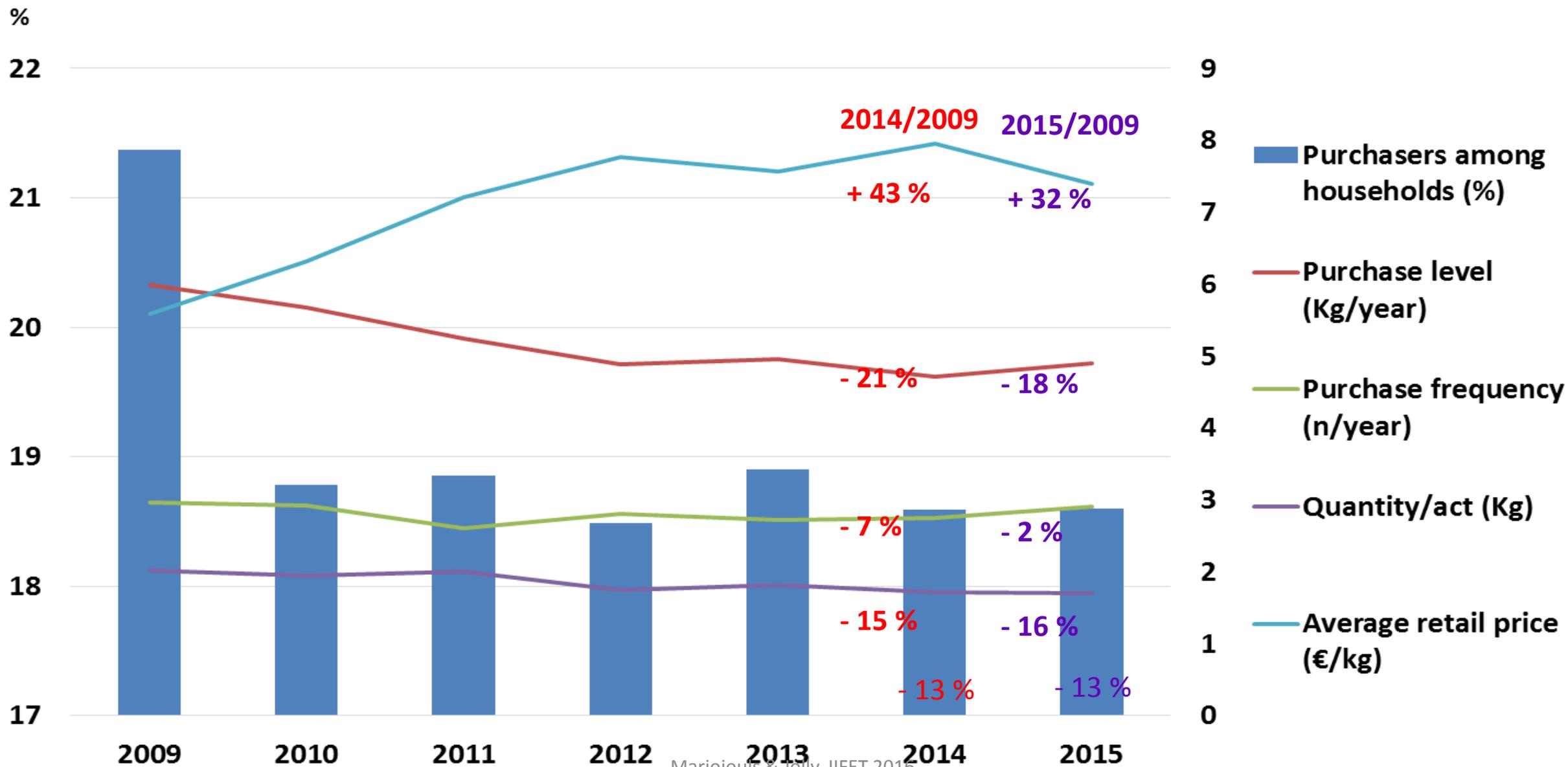


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# Consumers behaviour

# Results of consumer panel survey for households consumption

Source: Kantar WorldPanel - FranceAgriMer



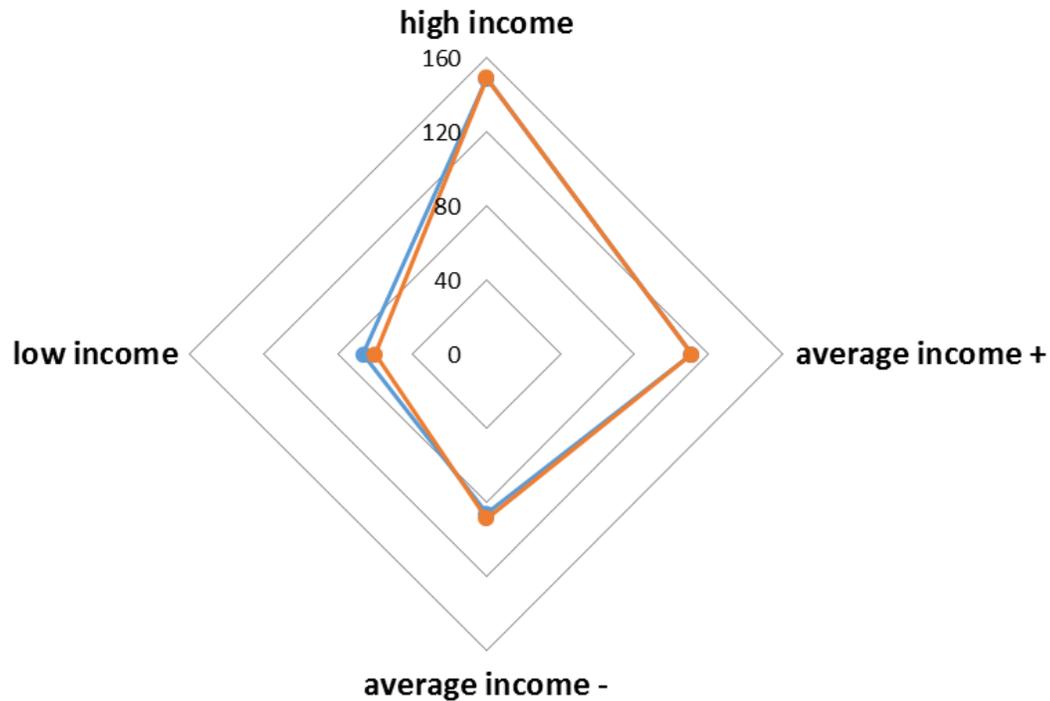
# Changes in consumer profiles

**Index of purchased quantity, by income class**

Source: Kantar Worldpanel & FranceAgriMer

Index 100: national average

—●— 2005-2006-2007      —●— 2012-2013-2014

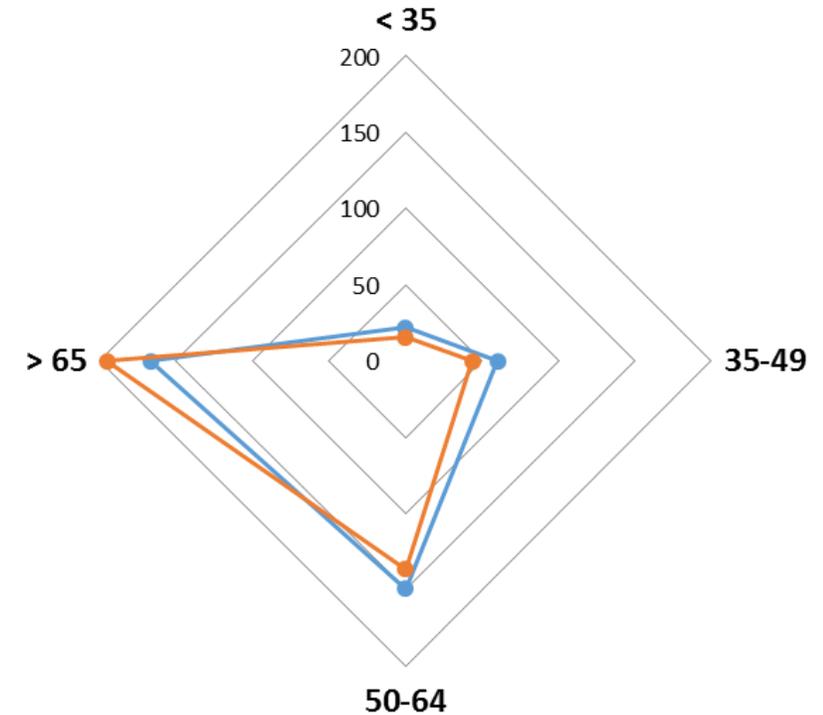


**Index of purchased quantity, by age of buyer**

Source: Kantar Worldpanel - FranceAgriMer

Index 100 : national average

—●— 2005-2006-2007      —●— 2012-2013-2014



# Conclusion

- The impact of the crisis in the French oyster farming sector is a drop in production (-28%) and an increase in prices (retail price + 43%), max effect in 2014
- Imports could not fill up significantly the deficit in supply
- The distribution channels have been modified
  - development of direct sales by oyster companies, hardly quantified,
  - relative regression of supermarkets market share, lower presence rate, concentration on traditional sale period (Xmas and New Eve)
- The households decreased their purchase
- But uncertainty remains in the analysis due to incomplete survey of direct sales, which increase is a major reaction of oyster farmers to the crisis.
- 2015 is a turning point: retail price decreasing & purchase level slightly recovering
- For future, some questions:
  - About mortality and production: If production recovers, which capacity of the oyster farming sector to regulate prices ?
  - About market: will lost purchasers come back to the market ?

# Thank you for your attention !



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