



French edible seaweed market

Overview of distribution networks

IDEALG project

Background and methodology

The characteristics of the French edible seaweed market were studied through a **shelf analysis**. Data required for this study were collected in 2014, during a survey carried out in 111 stores within 7 major French cities: Bordeaux, Lille, Lyon, Montpellier, Paris, Rennes and Strasbourg. **Seven categories of stores** were visited: organic food store chains, independent organic and dietary food shops, delicatessens, Asian supermarkets, hypermarkets, supermarkets and fishmongers. This data collection method makes it possible to know where seaweed are commercialised and what products are currently being provided by the suppliers (excluding online sale and markets). The items collected are then compiled and their analysis enables the identification of **the main distribution networks** of seaweed products as well as the **characteristics of the current supply** of these products.

N.B.: The work of the AGROCAMPUS OUEST fisheries and aquatic sciences centre only target macro-algae, used in food for their organoleptic properties. **Gelling agents and food additives are therefore excluded from this study.**

Structure of the market

During the study, surveyors collected 746 seaweed products references from all the stores they visited. The two main distribution networks for seaweed-based products are **organic food store chains** and **Asian supermarkets**. They account for more than half of the referenced products, followed by medium and large supermarkets, independent organic and dietary food shops and delicatessens. Fishmongers only account for a low percentage in the distribution of seaweed products.

	Presence rate of seaweed products	Average number of products in stores	Percentage of French-inspired products
Organic food store chains	100%	12.5	85%
Independent organic and dietary food shops	73%	4.9	84%
Delicatessens	40%	2.9	68%
Asian supermarkets	83%	11.1	0%
Hypermarkets	100%	6.6	8%
Supermarkets	87%	5.1	31%
Traditional fishmongers	8%	0.1	(No data)

The edible seaweed market is divided in two independent components in France: the Asian-inspired products market, the products of which are adapted to the **current context of high consumption of Japanese products** (sushi, miso soups and wakame salads); and the French-inspired products market, developed by French producers and processors, which offers a large range of products adapted to western cuisine.

French-inspired products market

Distribution network

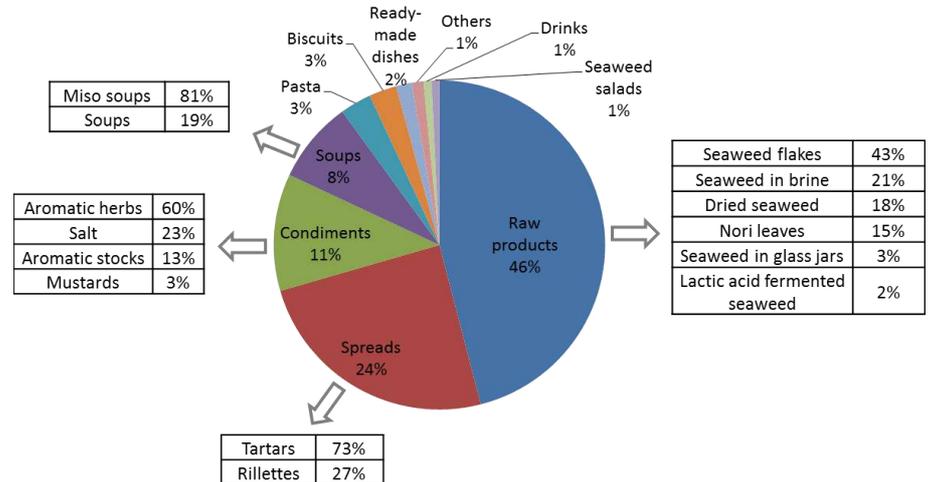
Organic food store chains represent the main distribution network of French-inspired products, followed by independent organic and dietary food shops and delicatessens.

Supply mapping

The distribution of French-inspired products is uneven across the territory. They are more available in the areas of Rennes and Paris than they are in the area of Lille, where they are almost inexistent.

Commercialised products

Products available for sale are primarily raw products (dried seaweed, seaweed in brine...), spreads (tartars and rillettes) and condiments.



Average composition of the supply of seaweed products in organic food store chains

Main brands

Three brands, specialised in the sale of edible seaweed, are particularly well represented at national level: *Bord à Bord*, *Marinoë* and *Les algues gastronomes*. Numerous other brands commercialise French-inspired seaweed products. However, they are less represented in stores.

Species of algae used

Algae species incorporated in French-inspired products are primarily those found on the coasts of Brittany: dulse, sea lettuce, nori and wakame. They are evenly used, unlike sea bean and kombu that are less valued by processors.

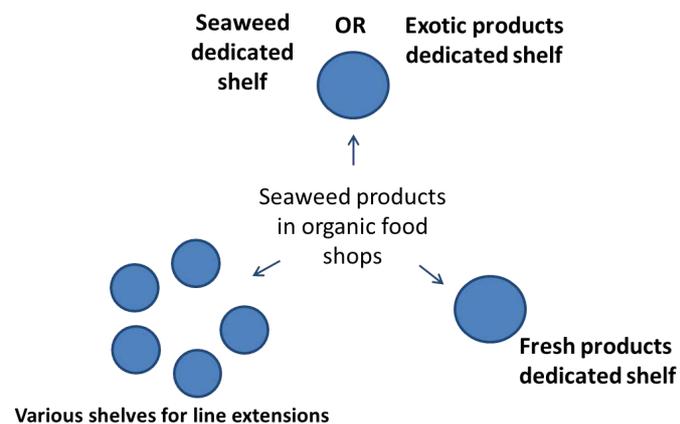
Claims and labels

About two-thirds of the products, identified by the surveyors, feature the organic farming label or an environmental claim.

Merchandising

The positioning of seaweed-based products is very variable depending on the organic food shops visited. Some products, such as fresh products or line extensions, are generally found in similar positions in all stores. Others can be presented on dedicated shelves or considered as exotic products.

Schematic representation of shelves dedicated to seaweed products in organic food shops



Asian-inspired products market

Distribution networks

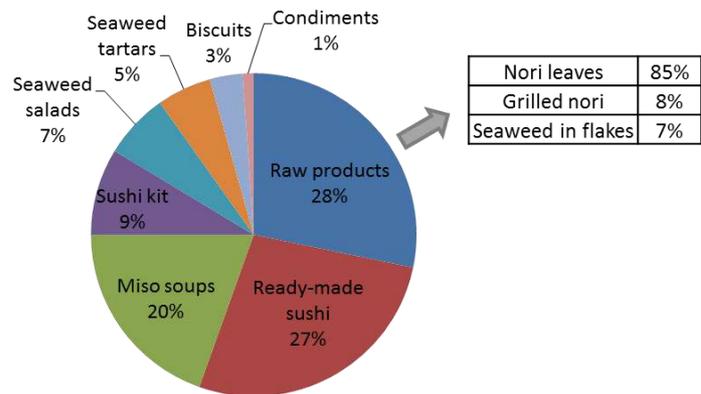
The main distribution networks linked to Asian-inspired products are Asian supermarkets, hypermarkets and supermarkets. Medium and large supermarkets, which are widely set up in France, are essential in the distribution of these products.

Supply mapping

The distribution of Asian-inspired seaweed products is more homogeneous across the territory than that of the French-inspired products. However, the areas of Lille and Bordeaux do not seem to be as well stocked as the rest of France.

Commercialised products

Products available for sale are primarily raw products (nori leaves and dried seaweed), miso soups and ready-made sushi.



Average composition of the supply of seaweed products in hypermarkets

Main brands

Asian supermarkets are very competitive spaces where a lot of brands commercialise a variety of seaweed-based products. The brands, referenced by the surveyors are, among others: Wang, Satsuki, Yamamotoyama, Kikkoman, Kae Tao Noï, Nagatanien and Otona. Tanoshi is the leader in Asian dedicated shelves in medium and large supermarkets, when Sushi Daily and Yedo are in competition for sushi bars within hypermarkets. Lima is very well represented, in organic food shops, with miso soups and nori leaves. Each brand seems to be specialised in a specific product category.

Species of algae used

Algae species used to formulate these products are, mainly, nori (74%) and wakame (30%).

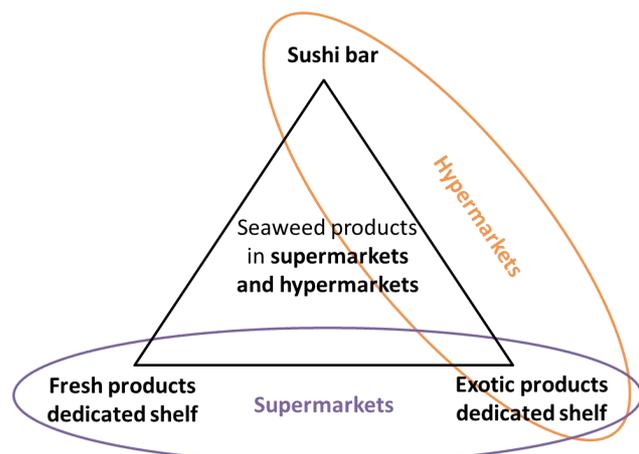
Claims and labels

Only 3% of Asian-inspired products, referenced by the surveyors, feature an organic farming label or environmental claim.

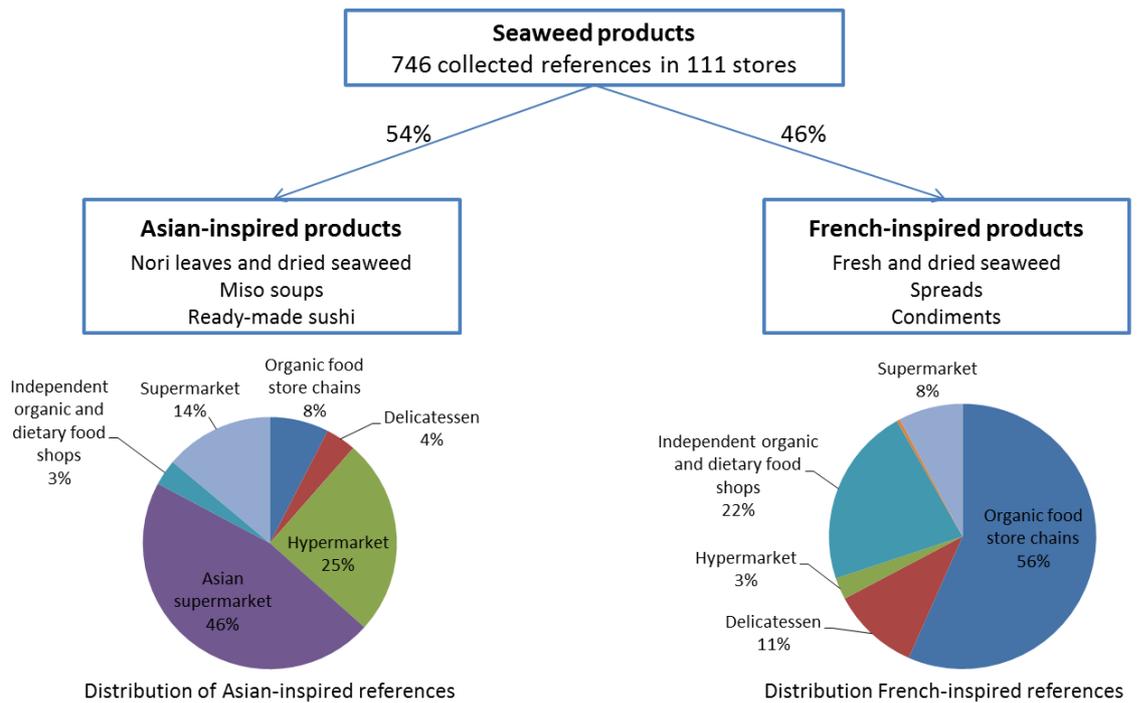
Merchandising

These products can be found in different positions in medium and large supermarkets: the shelf dedicated to exotic products features dried products (soups and nori leaves in particular); and ready-made sushi are offered in shelves dedicated to fresh products within supermarkets, or in sushi bars within hypermarkets. Generally, Asian supermarkets gather the entire range of seaweed products in the same shelf.

Schematic representation of shelves dedicated to seaweed products in supermarkets and hypermarkets



Overview of the French seaweed products market



Summary diagram of the distribution of seaweed products

French and Asian-inspired products are divided into two fundamentally different components, in terms of:

- **supply**: Asian-inspired products are oriented towards nori leaves, miso soups, ready-made sushi and seaweed salads, whereas French-inspired products are rather oriented towards dried seaweed, spreads and condiments;
- **image***: that of Asian-inspired products is linked to Japanese cuisine, exoticism and healthy snacking, while that of French-inspired products is variable. Some products are perceived as festive, others as original, while others seem to symbolise the territory of Brittany or healthiness;
- **target***: Asian-inspired products attract young workers (20 to 40 years old), thanks to sushi, whereas French-inspired products appeal to older target (35 to 55 years old), focused on their health;
- **distribution***: Asian-inspired products are mostly commercialised in Asian supermarkets, supermarkets and hypermarkets. French-inspired products are mainly distributed in organic food shops.

*Results from the survey "Consumption of edible seaweed in France"

The absence of seaweed products **from fishmongers** is **surprising**. The link between seaweed and the sea is very strong among respondents and numerous consumers would like to be able to purchase seaweed-based products from their local fishmonger. A **dissonance** phenomenon is observed here amid **consumer insight**, whether purchasing seaweed from the fishmonger, and market supply not providing this opportunity.

For more information

LE BRAS Quentin, LESUEUR Marie, LUCAS Sterenn, GOUIN Stéphane. 2015. Etude du marché français des algues alimentaires. Panorama de la distribution en magasins. Programme IDEALG Phase 2. Les publications du Pôle halieutique AGROCAMPUS OUEST n° 36, 42 p.

Contact

Marie Lesueur • marie.lesueur@agrocampus-ouest.fr • 02.23.48.58.62

Quentin Le Bras • Charline Comparini • 02.23.48.55.30

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