



FRESH OG REFRESHED

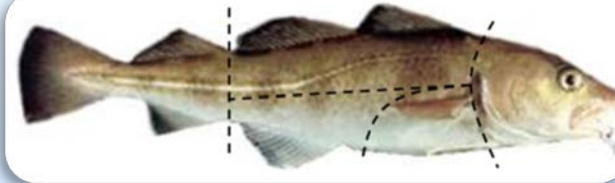
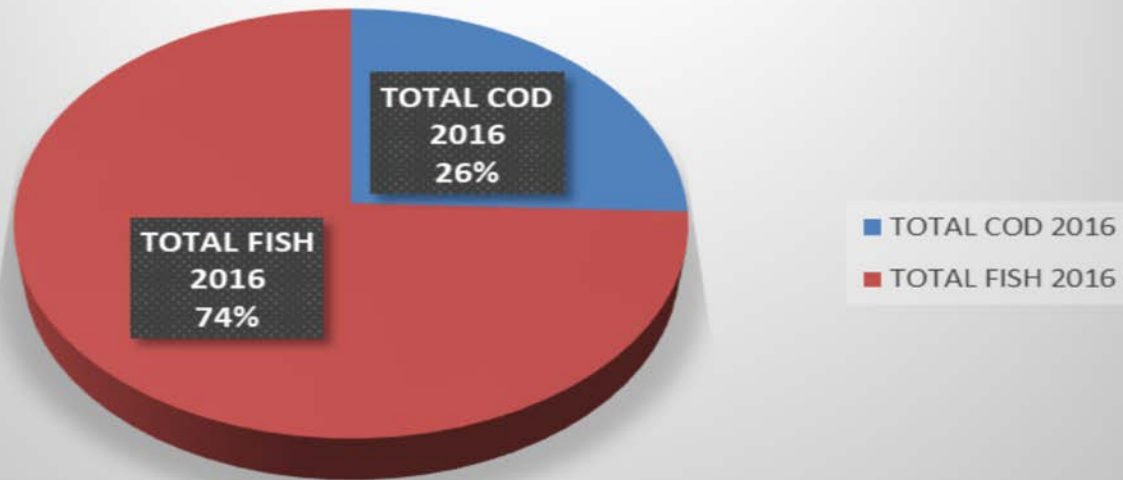
BEATRICE HOCHARD

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í Hörpu, 16.-17. nóvember



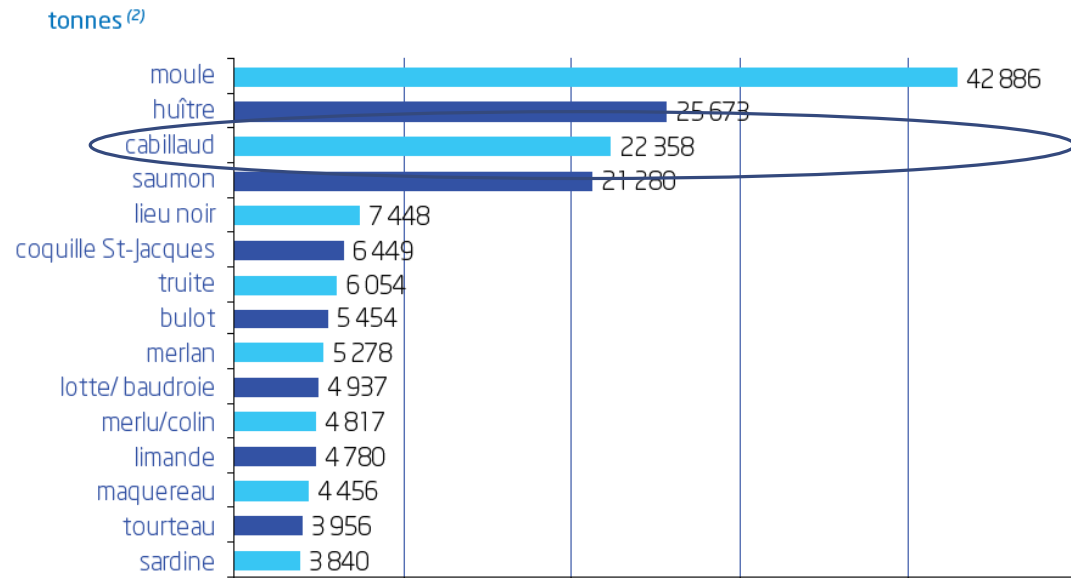
PRESENTATION

COD ON FRENCH MARKET



COD SITUATION ON FRENCH MARKET

Principales espèces achetées en frais en 2016⁽¹⁾



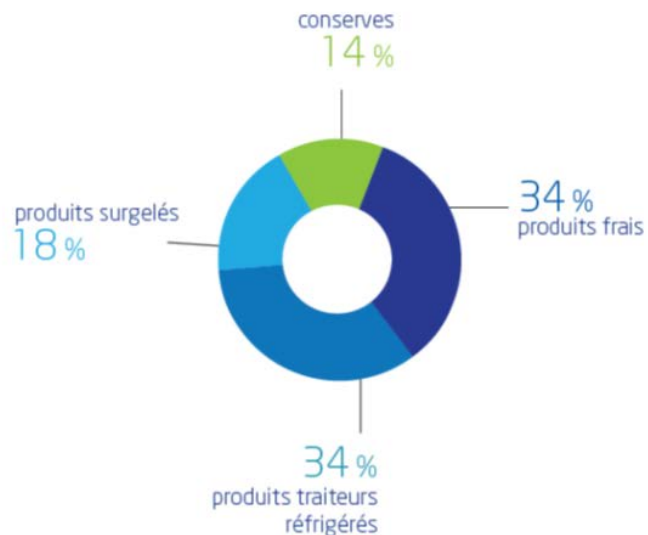
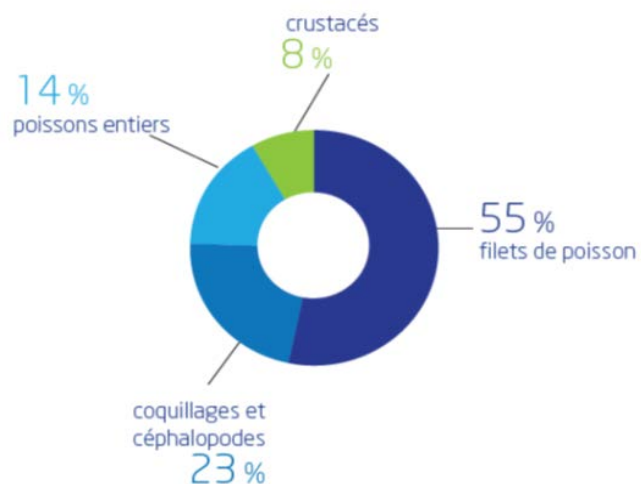
Source : FranceAgriMer d'après Kantar Worldpanel

Produits frais

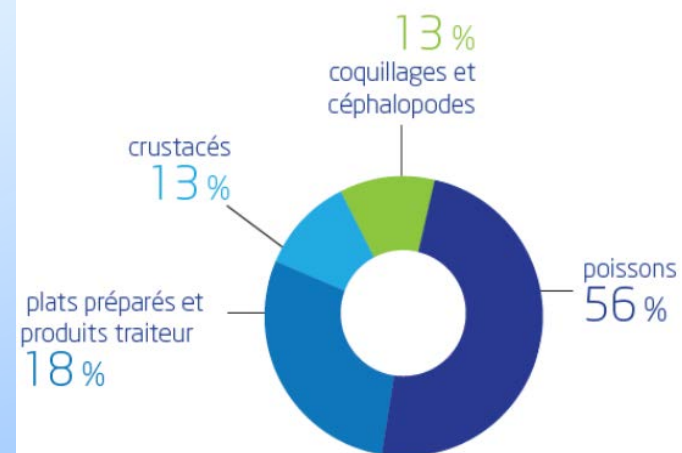
Cumul annuel fin sept-16	Volume	Prix moyen
Poissons frais	+ 1 %	+ 5 %
- entiers	- 5 %	+ 4 %
- découpés	+ 3 %	+ 4 %
saumon	- 13 %	+ 16 %
cabillaud	+ 3 %	+ 5 %
truite	+ 15 %	- 1 %
lieu noir	+ 4 %	+ 3 %
merlan	+ 10 %	- 1 %
Poissons frais hors saumon	+ 4 %	+ 3 %
Coquillages frais		
hors noix de Saint-Jacques	- 1 %	+ 1 %
noix de Saint-Jacques	- 29 %	+ 20 %
moule	- 3 %	+ 3 %
huitre	+ 5 %	- 3 %
Céphalopodes frais	- 5 %	+ 2 %
Crustacés frais	+ 8 %	+ 4 %
langoustine	+ 24 %	- 4 %

CONSUMER HABIT

FRESH FISH



FROZEN FISH

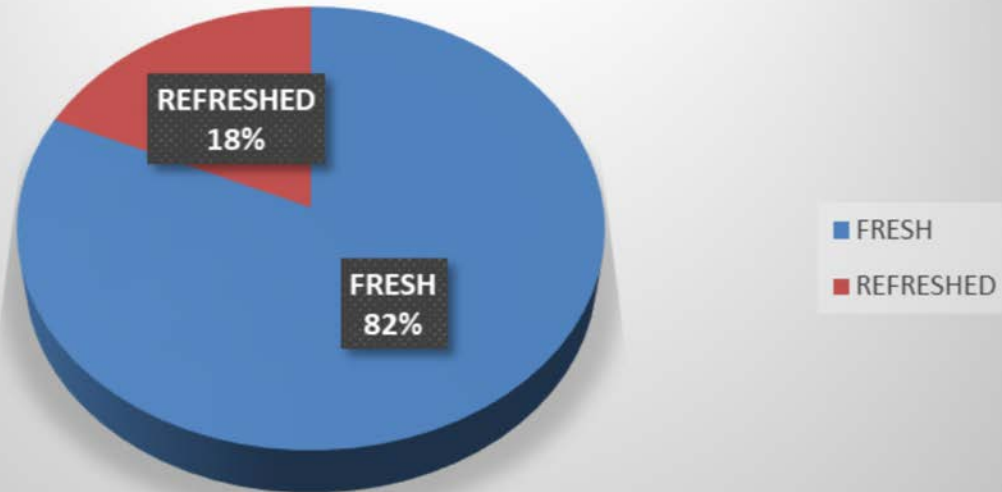


Source : FranceAgriMer d'après Kantar Worldpanel

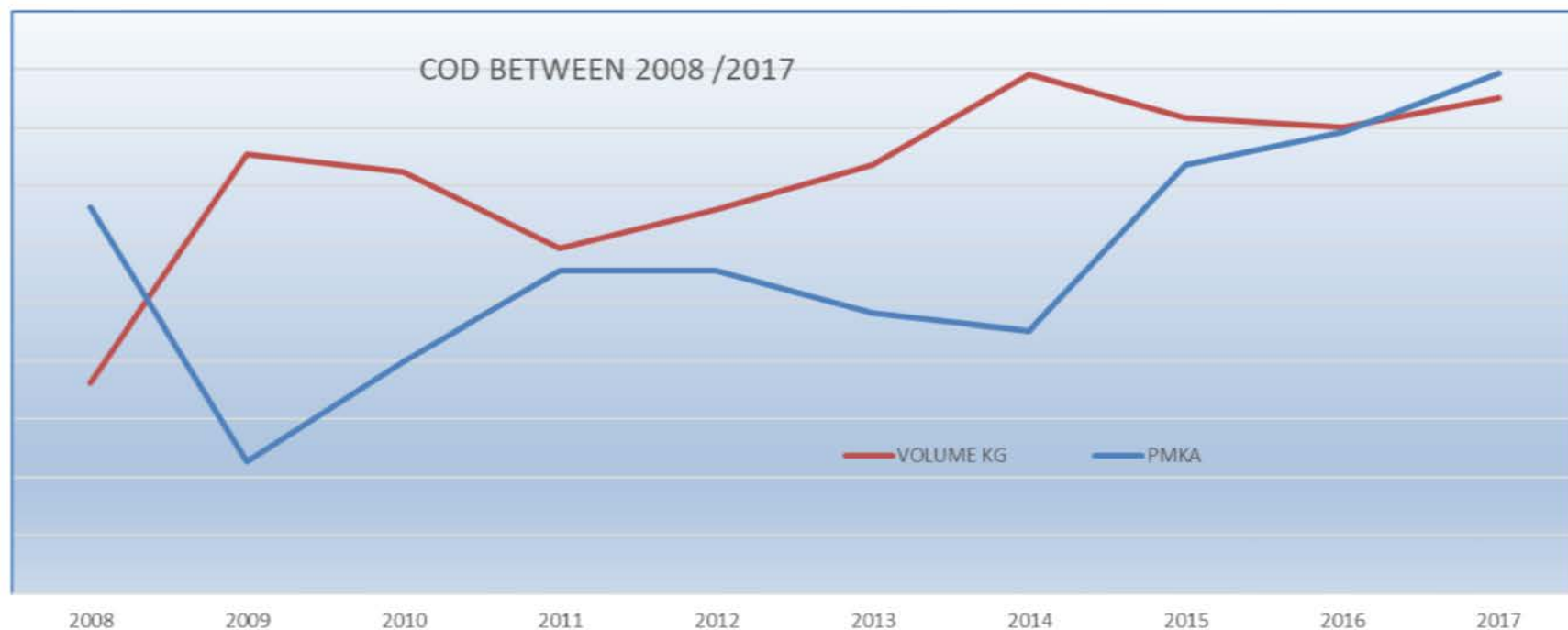
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FRESH COD LOINS VS REFRESHED COD LOINS

FRESH COD VS REFRESHED COD



FOCUS ON FRENCH MARKET EVOLUTION QUANTITY AND PRICE FOR COD IN GENERAL



VOLUME : increasing

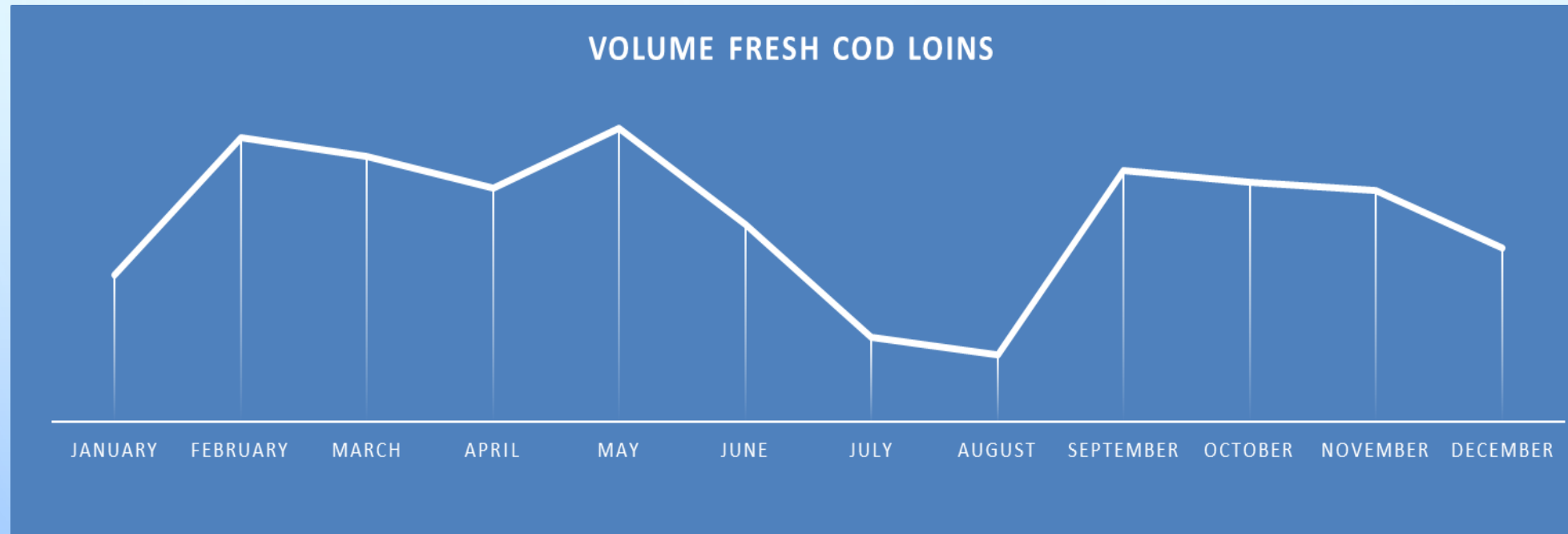
PRICE : increasing because of increasing demand

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SEASONALITY ON COD

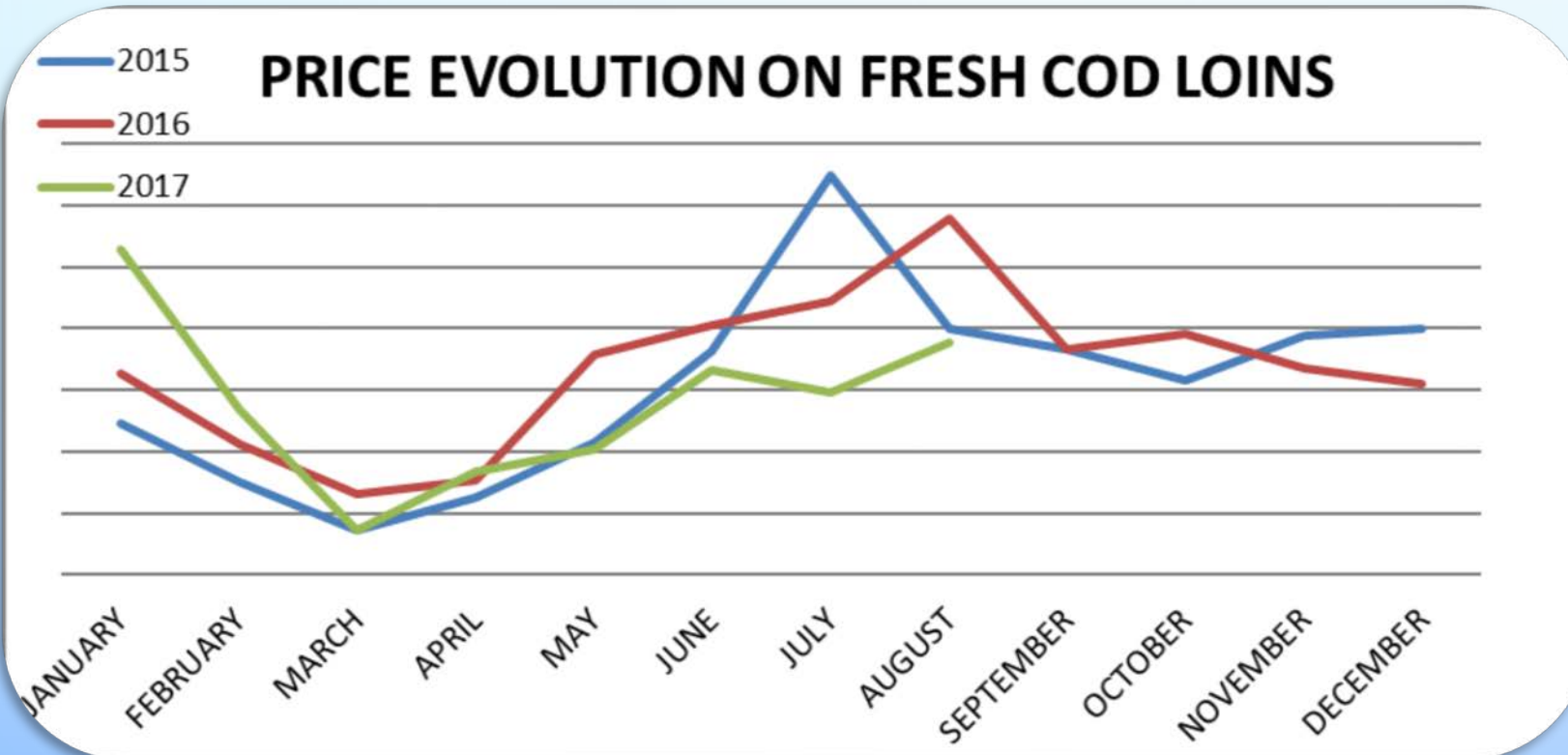


EVOLUTION OF VOLUME OF FRESH COD



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FRESH COD VS REFRESHED



Big volumes available from the end of January to April.....price decreases
Few volumes in June, July, August...price increases
Autumn to December Cod is from Island, market sustained

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REFRESHED

GADUS MORHUA

NATURAL

SALTED



GADUS MACROCEPHALUS

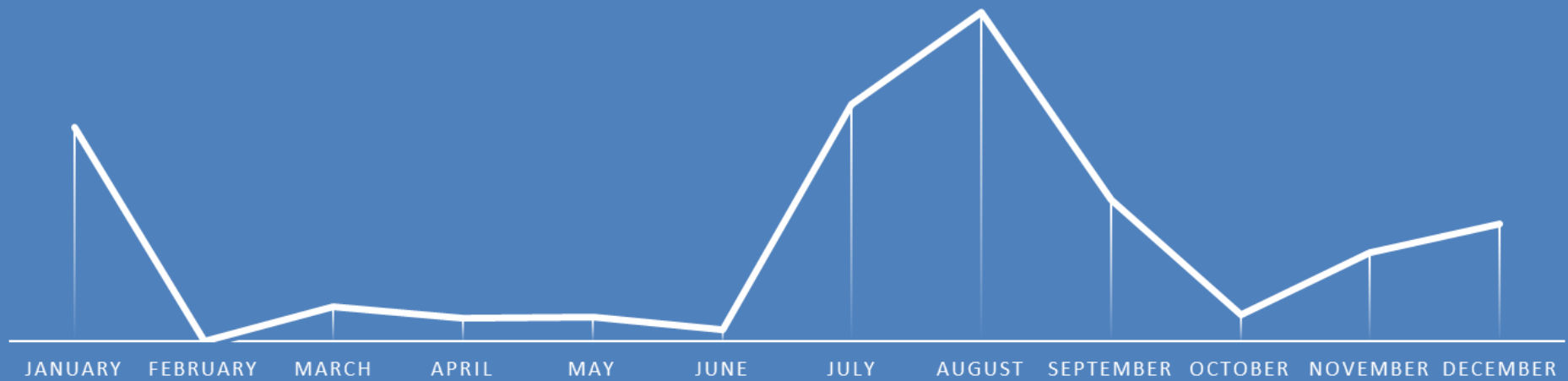
NATURAL

SALTED



EVOLUTION ON REFRESHED COD

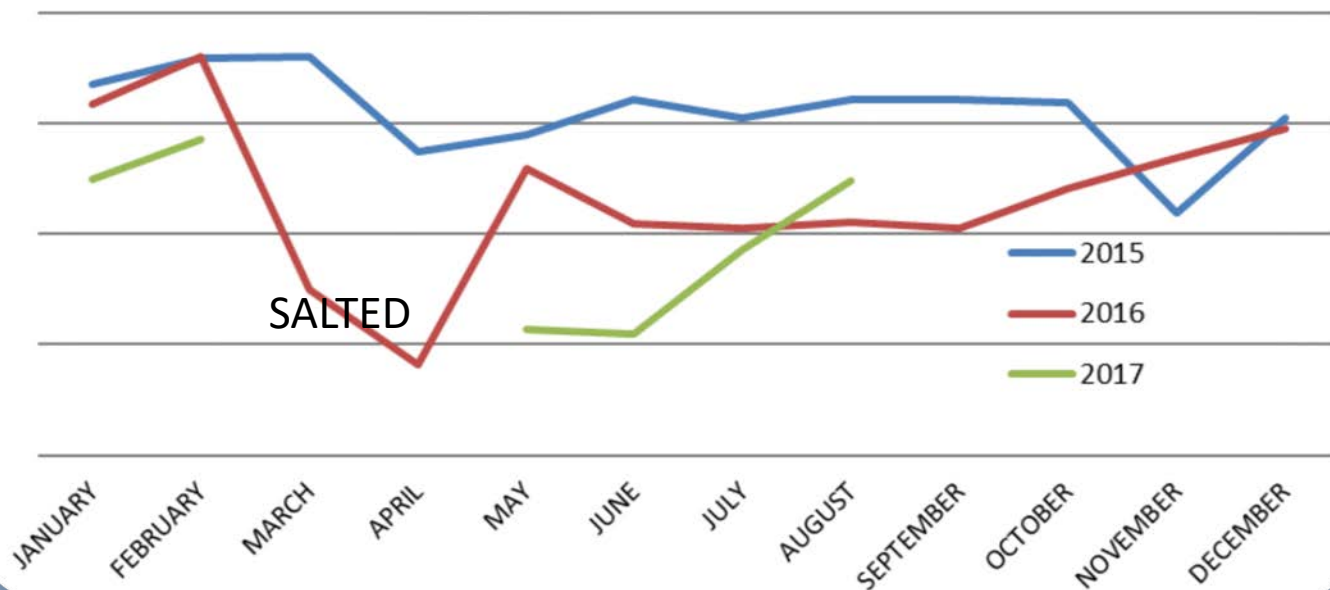
VOLUME REFRESHED COD LOINS



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REFRESHED

PRICE EVOLUTION ON REFRESHED COD LOINS



Opposite of fresh, price increases when the fresh cod is less available.

More suppliers on the refreshed market

Gadus macrocephalus + Gadus morhua.

FRESH COD

VS

REFRESHED COD

ADVANTAGES



- Freshness, very good product
- Quality
- Presentation
- Consumers : can be frozen

DISADVANTAGES



- Fishing depends on weather
- Price depend on the market (up & down price)

ADVANTAGES



- Always available
- Easier for planning promotion
- Stability on price
- Don't depend on weather

DISADVANTAGES



- Quality is below fresh cod
- Best before shorter than fresh
- More salted (if salted added)....health

FRAUDULENT SCHEME

FOOD FRAUD CRITERIA

- 1 . Violation of EU food law : use of any treatment aimed at improving quality is a fraud as it deceives consumers.
- 2 . Intention : antioxidants : if there is some treatment to improve quality, and as this treatment is not declares it is ILLEGAL
- 3 . Economic Gain : poor or average quality cod is sold as high quality
- 4 . Consumer deception : public health issue : treatment could potentially cause allergic effects

LABEL FOR REFRESHED

TREATMENT

COD LOINS DECONGELE 2-400GR

Gadus Macrocephalus

Ingrédient : Eau - Sel

Peché Ocean Pacifique Nord / FAO 67

Techniques de pêche: Longlines/LLS

Date d'emballage 11.01.2017

A consommer jusqu'au 21.01.2017

NE PAS RECONGELER

Poids net 5 Kg A conserver entre 0-2°C

BEST BEFORE

CAN'T BE FROZEN

REGULATION

Regulation (EU) n° 1169/2011 of the european parliament and of the concil of 25 october 2011 or OCM « pêche » EU n° 1379/2013 2013/12/11

DGCCRF in France told that a salted product is not transformed enough, so salted cold must be called refreshed cod.

On the label it has to be mentionned « refreshed = décongelé »



DIRECTION GÉNÉRALE DE LA CONCURRENCE,
DE LA CONSOMMATION ET DE LA REPRESSION DES FRAUDES

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CONCLUSION

REFRESHED COD IS INCREASING SINCE 2 YEARS TO ENSURE COD IS AVAILABLE IN RETAIL 365 DAYS A YEAR .

BUT FRESH AND REFRESHED COD ARE TWO DIFFERENTS PRODUCTS AND HAVE TO BE CONSIDER AS TWO DIFFERENTS PRODUCTS.

BE HONEST TO OUR CONSUMERS, AND REGULATION.