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FAP consumption trends and Covid-19 crisis in France: are sustainability issues considered by consumers?

Kilian HEUTTE[1], Fabienne DAURES[1], Sterenn LUCAS[2], Sophie GIRARD[1], Frédérique ALBAN[3], Pascal LE FLOC'H[3]

Introduction

Sustainability dimensions are often conflicting with purchasing power and practical purchases regarding food consumption. France lands, farms, imports, and consumes large quantities of fisheries and aquaculture products (FAP). The pandemic affected both domestic and foreign FAP supply through restrictions on trade and fishing conditions. Numerous sale points proposing FAP were closed during the pandemic. This general context could be a breeding ground to question the consumers' role on environmental, economic, and social issues.

Objectives

The aim of this work is to assess whether the Covid-19 crisis has been an opportunity for French consumers to align their consumption at-home with environmental issues by favouring domestic producers or short distribution channels.

Methodology

Quantitative data derived from the Kantar panel on at-home household purchases in metropolitan France from 2017 to 2021 was used along with t-test methods. Annual and monthly timeframes were considered in order to compare 2020 with 2017-2019. FAP are conventionally classified according to their packaging and species. We propose to consider FAP according to their consumption pattern using Principal Component Analysis (PCA) to create product clusters based on household purchase variables and thus compare the evolution of these groups between 2017-2019 and 2020.

Results

The amount spent on fresh fish increased by 5.56% in 2020 (Table 1). This coincides with an increase in average prices of 3.07%. In terms of quantities purchased and market penetration, no significant change can be observed.

Table 1: *Annual evolution in 2020 for fresh fish per distribution channel compared to 2017-2019 (Rates in %)*

	Total	Generalised Distribution Channels (GDC)	Specialised Distribution Channels (SDC)
Amount spent	+5.56*	+4.08	+10.38***
Quantities purchased	+2.3	+0.72	+8.68
Average prices	+3.07**	+3.16**	+1.67
Market penetration	+1.71	+1.92	+3.21

Student/Welch t-test, * $p < 0.10$, ** $p < 0.05$, *** $p < 0.01$
Source: COPECO, according to FranceAgriMer-Kantar data extracted on Jun 27, 2021

It seems that salmon and cod are still widely favoured at-home by French consumers (Table 2), while their national production is virtually non-existent. The abundant supply of fresh salmon initially intended for other markets has permitted to consolidate the dominant position of this species on the French market. PCA results suggest that very few products were consumed differently in 2020 (including fresh shellfish) and the main observed cluster changes appear to be linked with price variations.

The already existing trend of purchasing pre-packaged fresh fish has been largely amplified by the pandemic (Table 2) and seems to be a long-term phenomenon. In a context of perceived loss of consuming power, pre-packaged fresh fish appears to be perceived as paradoxically cheaper despite its higher average price per Kg. This type of packaging makes the purchasing act easier, quicker, and safer.

This may illustrate the search for convenience and swiftness by consumers, both in the purchasing act and home cooking. The presence of increasingly important information for the consumer (Use-by date, origin, label, production method, etc.) and hygienic standards can also explain the popularity of this trend in replacing stall-served fresh fish. Attracted by the abundant and supposedly "cheaper" supply of pre-packed fresh fish, more and more households favoured discounters for their home consumption in 2020 (Figure 1).

Table 2: *Annual evolution in 2020 for fresh FAP compared to 2017-2019 (Rates in %)*

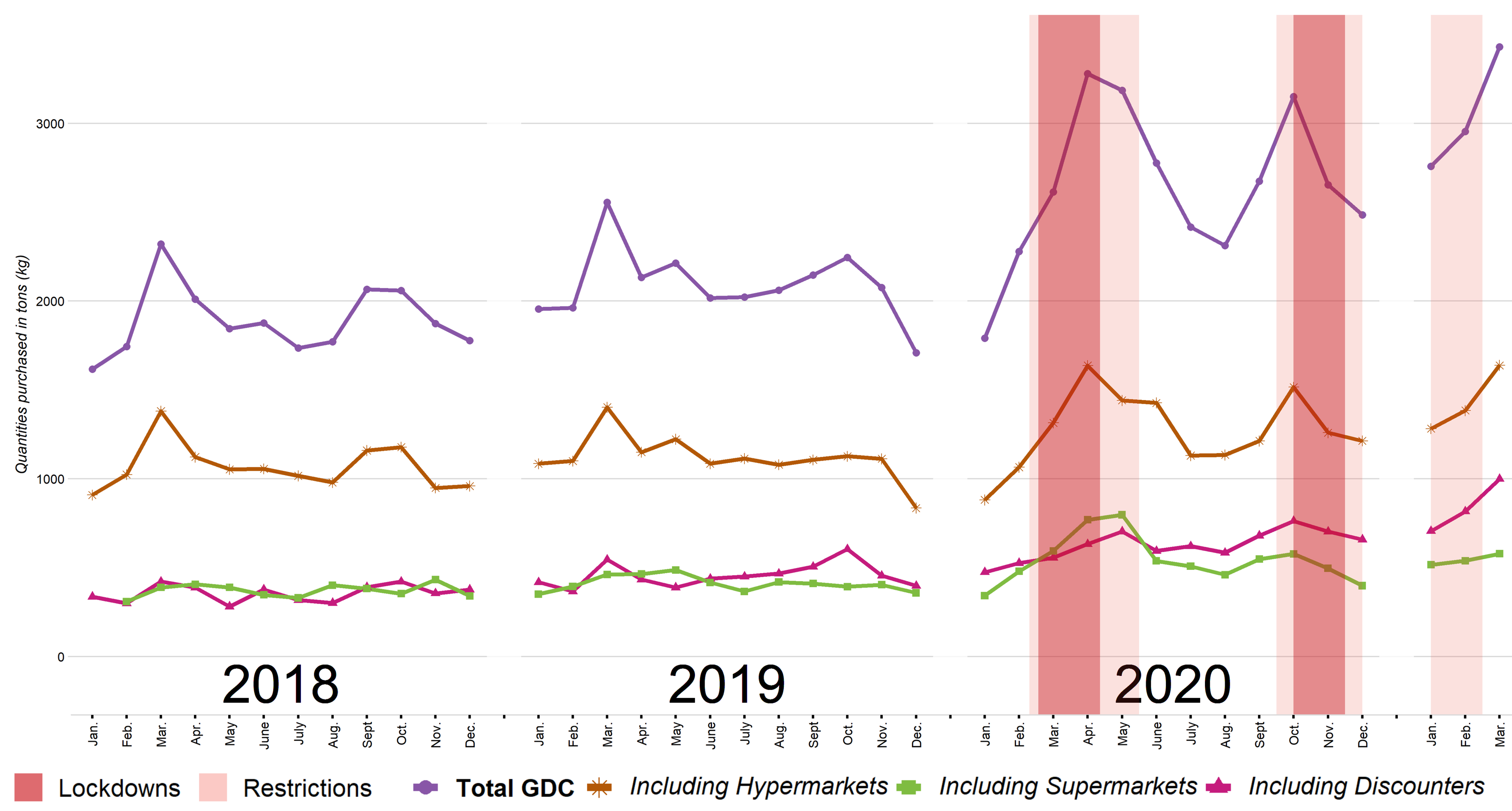
	Species				Total Fresh Fish	
	Salmon	**Cod**	**Trout**	**Shellfish**	**Stall-served**	**Pre-packaged**
Amount spent	+27.77***	-10.73	+13.85***	-4.8	-5.76*	+35.69***
Quantities purchased	+34.24***	-19.62**	+8.58	-6.89	-7.82**	+35.92***
Average prices	-5.19**	+10.42***	+4.67**	+2.75	+2.1	-0.16
Market penetration	+27.56***	-13.1**	+5.97	-4.33	-11.67***	+26.33***

Student/Welch t-test, * $p < 0.10$, ** $p < 0.05$, *** $p < 0.01$
Source: COPECO, according to FranceAgriMer-Kantar data extracted on Jun 27, 2021

The unusual increase in the consumption of long shelf life FAP during the first lockdown is a phenomenon materialising through multiple distribution channels. Proximity shops and online/drive distribution channels were able to adapt to the very high demand from consumers and to the constraints generated by the pandemic during the first lockdown. Interestingly, the use of online channels seems to persist beyond lockdowns.

Nonetheless, fresh fish consumption in SDC (mainly open-air markets and fishmonger shops) increased significantly during the second lockdown and therefore globally in 2020. The re-discovery by consumers of these distribution channels is probably a new phenomenon, contributing to more sustainability. However, these distribution channels still remain a minor share of the total fresh fish market (< 20%), where imported species such as salmon and cod prevail.

Figure 1: *Evolution of quantities purchased in GDC for pre-packaged fresh fish*



Source: COPECO, according to FranceAgriMer-Kantar data extracted on Jun 27, 2021

Conclusion

At-home FAP consumption in France remains poorly linked to the domestic supply, despite the Covid-19 crisis and its effects on import restrictions and available surpluses. Given the context and the magnitude of the crisis, one may have expected much greater changes in at-home French consumption. The pandemic has likely triggered existing trends rather than questioned deeply rooted unsustainable trends. This may give us further evidence of the resilience of the supply chain together with the inertia of consumer habits facing exogenous shocks.

Contact Information

- kheutte@ifremer.fr - Fabienne.Daures@ifremer.fr - sterenn.lucas@agrocampus-ouest.fr
- www.umr-amure.fr/projets-scientifiques/projet_copeco/

[1] Ifremer, Univ Brest, CNRS, UMR 6308, AMURE, Unité d' Economie Maritime, IUEM, F-29280 Plouzané, France. [2] Institut Agro, INRAE, SMART, 65 Rue de Saint-Brieuc – CS 84215, 35042, Rennes Cedex, France. [3] Université Brest, Ifremer, CNRS, UMR 6308, AMURE, IUEM, F-29280 Plouzané, France.

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