



Affaires étrangères, Commerce
et Développement Canada

Royaume du Maroc
Ministère de l'Industrie,
du Commerce, de l'Investissement
et de l'Economie Numérique



المملكة المغربية
وزارة الصناعة
والتجارة والاستثمار
والاقتصاد الرقمي



Ministère Chargé du Commerce Extérieur

Projet de Développement des Exportations pour la Création de l'Emploi (EDEC) au Maroc
MOR/20/137A – IB34

Le marché US des Produits de la Mer *Opportunités pour les Exportateurs Marocains*

Casablanca, le 25 Novembre 2014

par Roland Wiefels



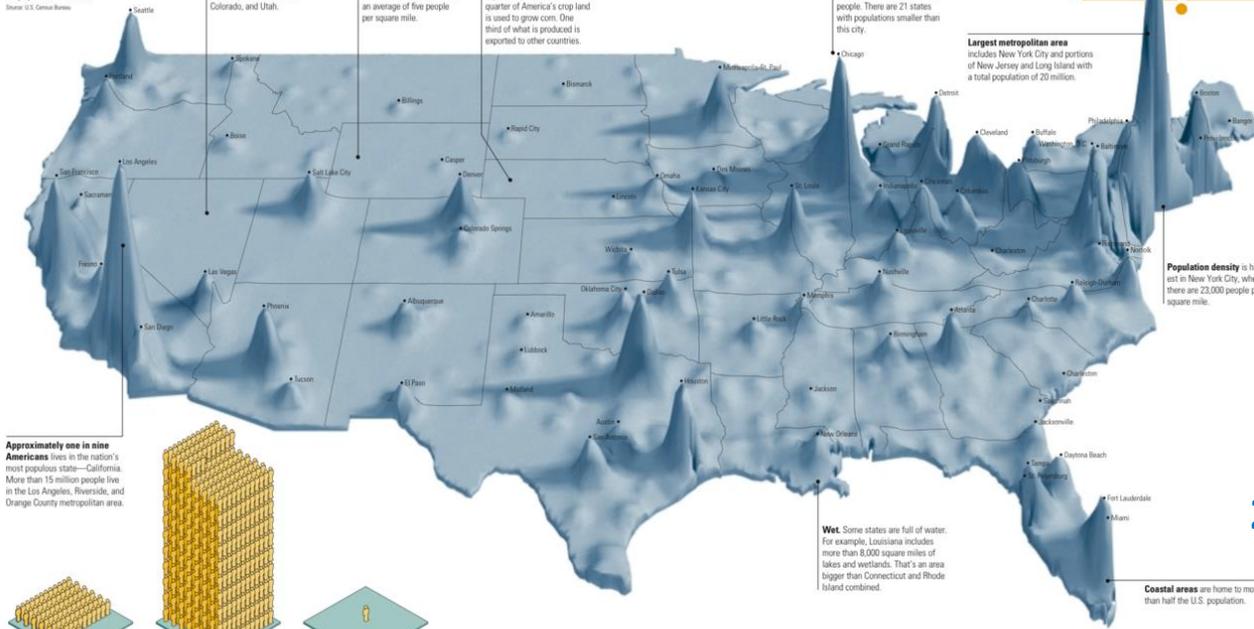
The population of the United States is not distributed evenly. Instead, we tend to bunch up in communities, leaving the spaces in between more sparsely inhabited. Most Americans live in or near cities; today 53 percent live in the 20 largest cities. 75 percent of all Americans live in metropolitan areas.

Grands centres urbains aux USA

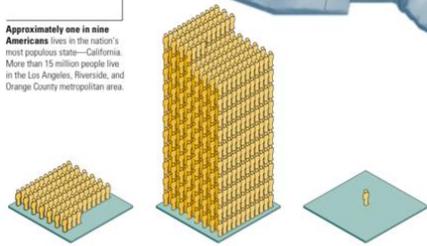
Population Distribution

Where do we live?
Where don't we live?

This map shows population density. The relative height of each major city reflects its population in 1990.



Approximately one in nine Americans lives in the nation's most populous state—California. More than 15 million people live in the Los Angeles, Riverside, and Orange County metropolitan area.



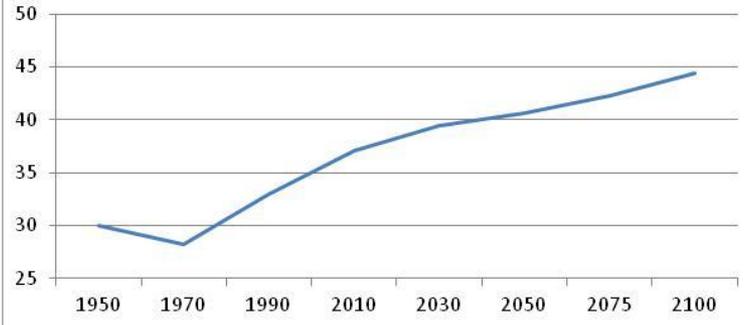
Distributing our population evenly would put an average of 76 people per square mile.

New Jersey is the most densely populated state with an average of more than 1,000 people per square mile.

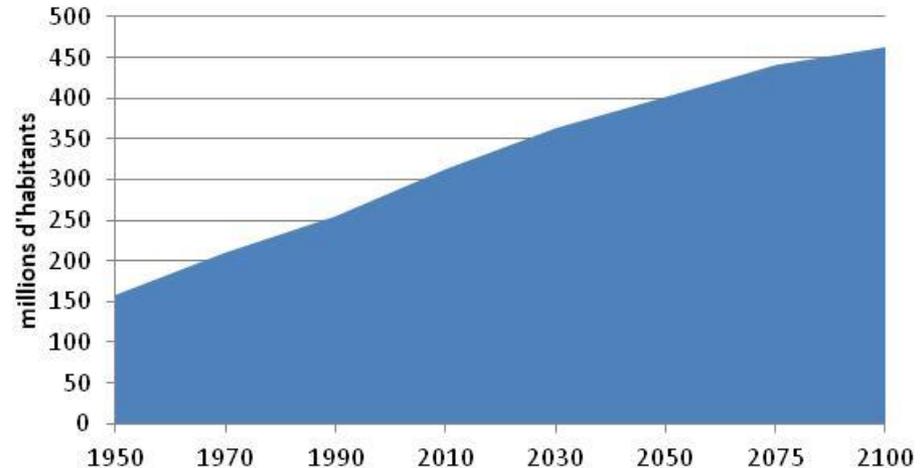
Alaska is a sparsely populated state with an average of one person per square mile.

2015: 325.128 habitants

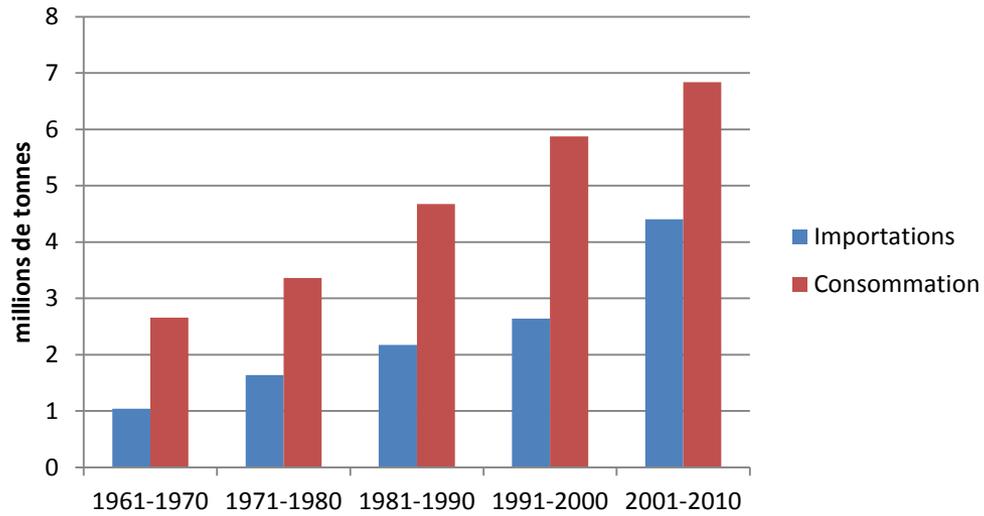
Évolution de l'âge moyen de la population US



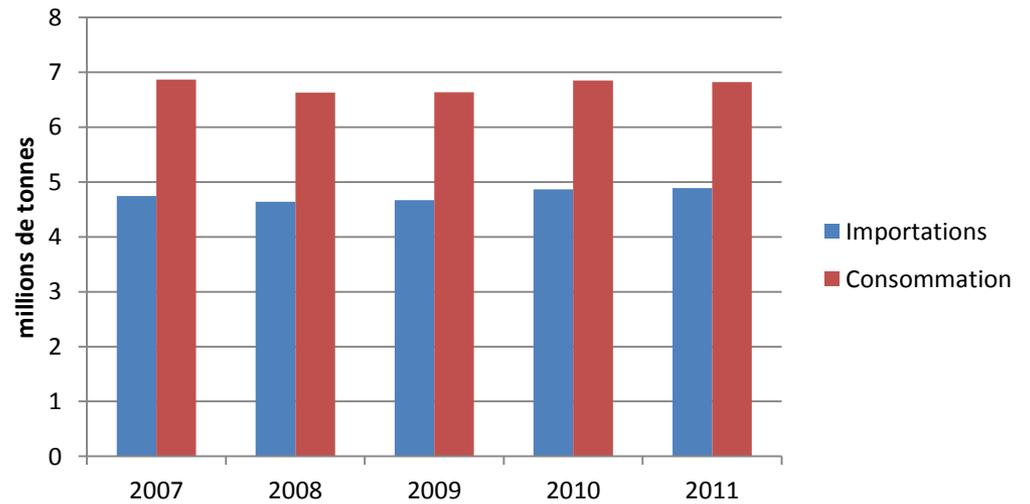
Évolution de la démographie aux États Unis



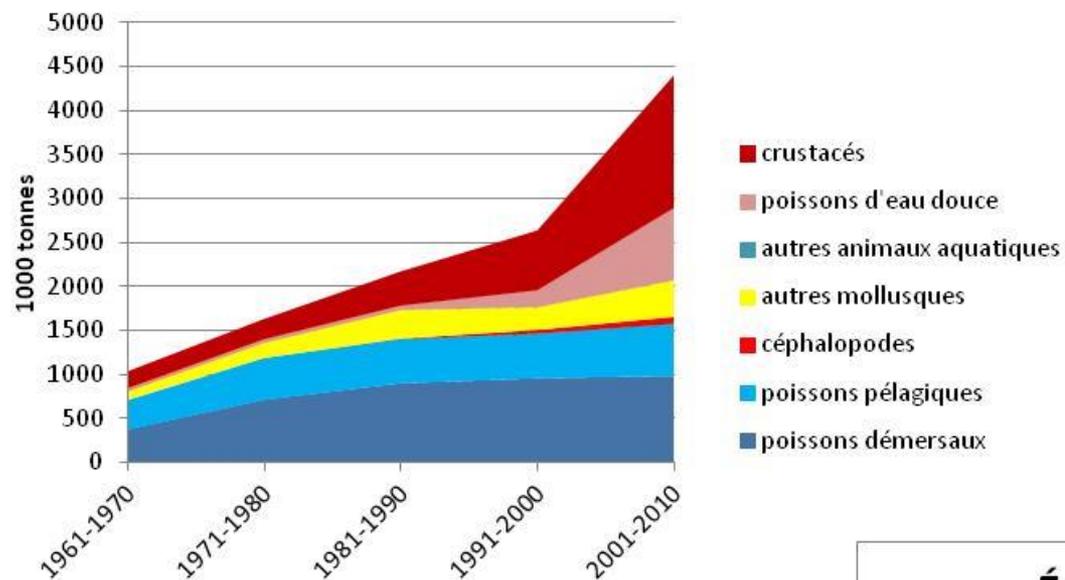
Consommation et Importations US de produits halieutiques



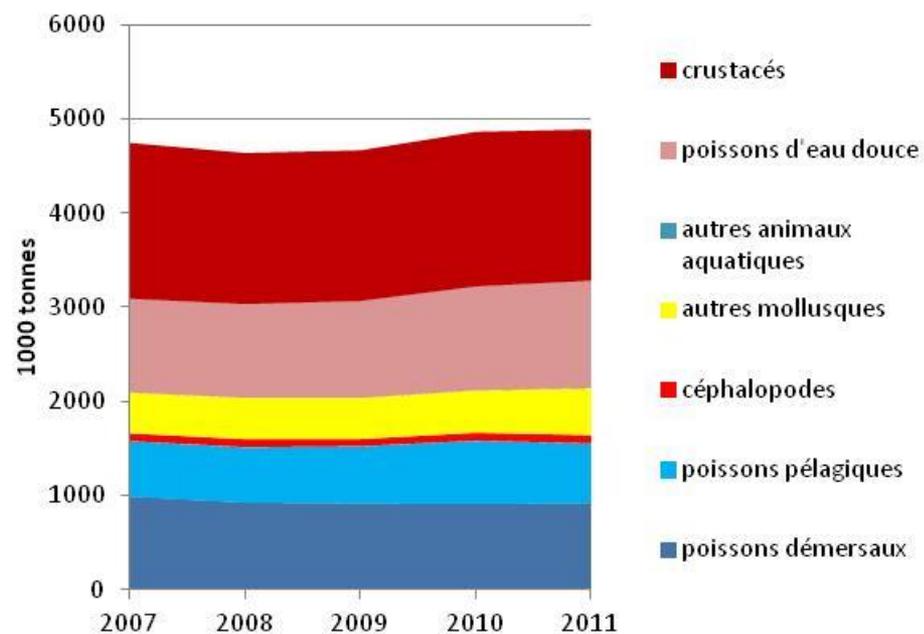
Consommation et Importations US de produits halieutiques



Évolution des importations US



Évolution des importations US



U.S. COMMERCIAL FISHERIES 2013 TOTAL LANDINGS AND VALUES



**2013
National
Totals**

LANDINGS
9.9
billion pounds
+2.5% from 2012

VALUE
\$5.5
billion dollars
+7.6% from 2012

SIGNIFICANT INCREASES



**Total Salmon
Landings**
1,069 million pounds
+68% from 2012



**Pacific Hake
Landings**
506 million pounds
+46% from 2012



**Pacific Sardine
Landings**
138 million pounds
-37% from 2012



**Blue Crab
Landings**
134 million pounds
-36% from 2012

SIGNIFICANT DECREASES



**Mid-Atlantic
Landings**
583 million pounds
-22% from 2012



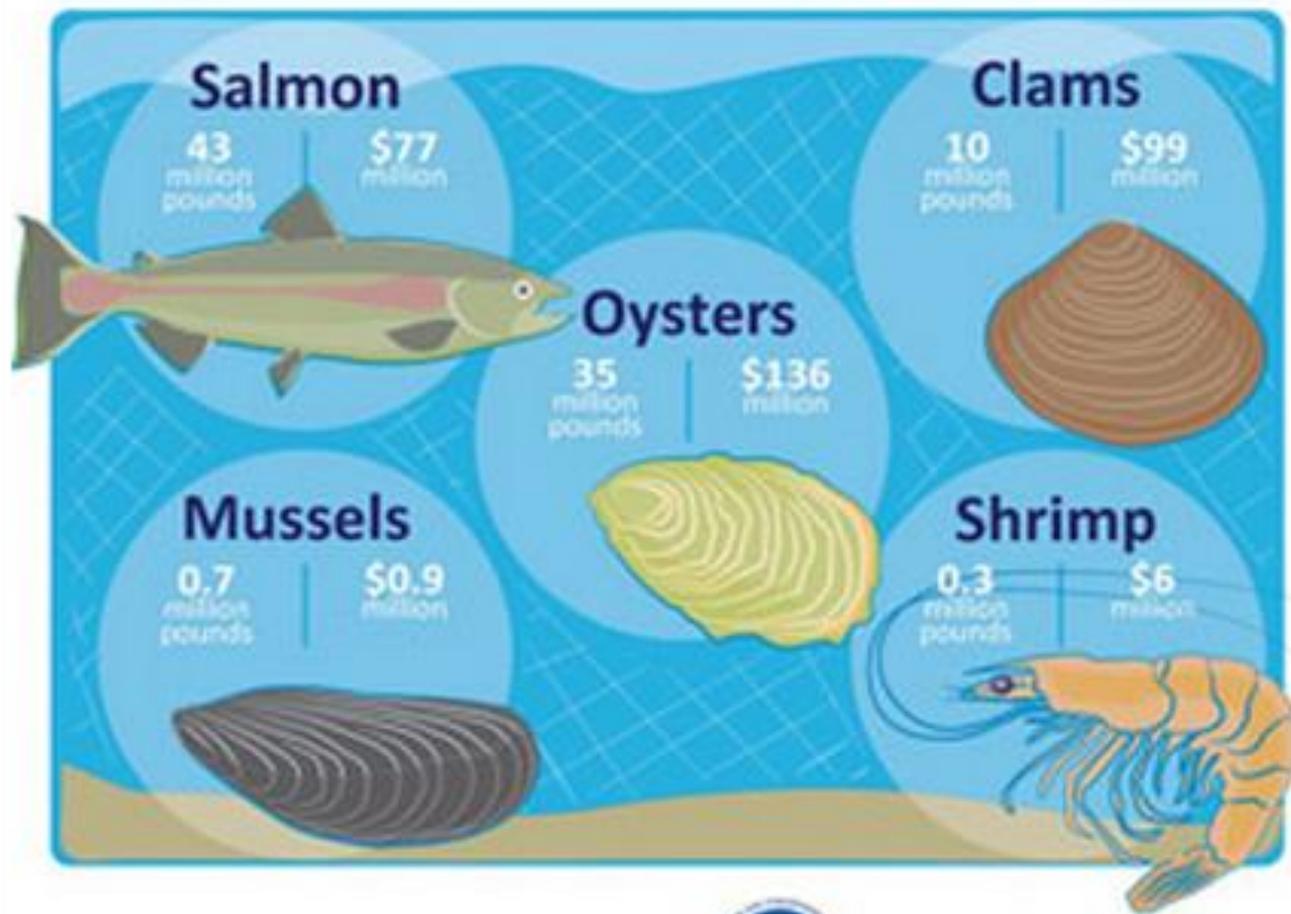
**Atlantic Menhaden
Landings**
1,467 million pounds
-25% from 2012



NOAA FISHERIES

U.S. Commercial Fisheries 2013 - Total landings and values.
(Credit: NOAA)

U.S. AQUACULTURE PRODUCTION 2012 LANDINGS AND VALUES



NOAA FISHERIES

U.S. Aquaculture Production 2012 - Landings and values. (Credit: NOAA)

U.S. RECREATIONAL FISHERIES 2013 TOTAL ANGLERS AND TRIPS



**Alaska data are not available for 2013.*

Alaska contributed 1% and 0% of national trips and catch, respectively.

Hawaii contributed 1% and 0% of national trips and catch, respectively.



NOAA FISHERIES

U.S. Recreational Fisheries 2013 - Total anglers and trips.
(Credit: NOAA)

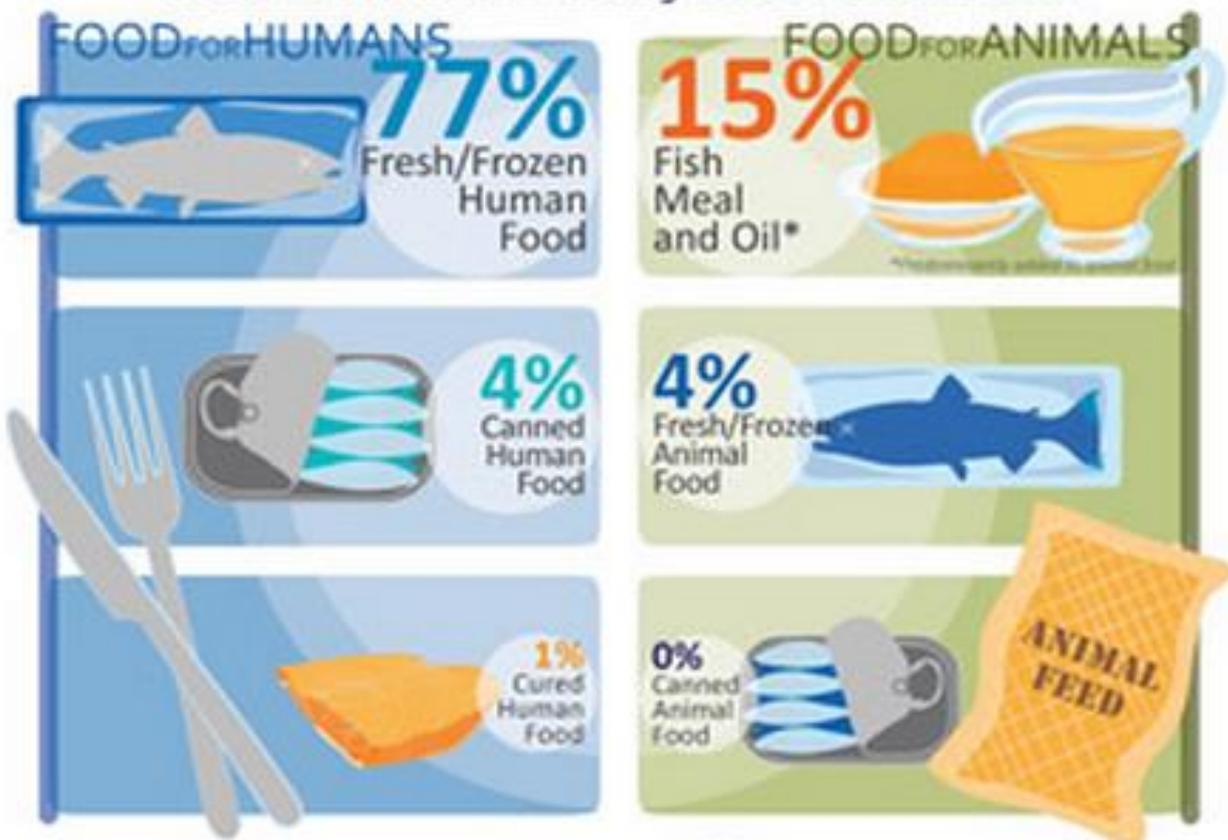
U.S. RECREATIONAL FISHERIES 2013 KEY SPECIES HARVESTED*



U.S. Recreational Fisheries 2013 - Key species harvested. (Credit: NOAA)

Total de ces 5 espèces: 22.226 tonnes

U.S. COMMERCIAL FISHERIES 2013 HOW OUR CATCH IS USED



U.S. Commercial Fisheries 2013 - How our catch is used. (Credit: NOAA)

Principales portes d'entrée pour les produits halieutiques

The population of the United States is not distributed evenly. Instead, we tend to bunch up in communities, leaving the spaces in between more sparsely inhabited. Most Americans live in or near cities; today 53 percent live in the 20 largest cities; 75 percent of all Americans live in metropolitan areas.

This map shows population density. The relative height of each major city reflects its population in 1990.

Source: U.S. Census Bureau

Go West. Nevada is the fastest growing state, followed by Arizona, Idaho, Colorado, and Utah.

Wyoming has the lowest population density of all states in the lower 48 with an average of five people per square mile.

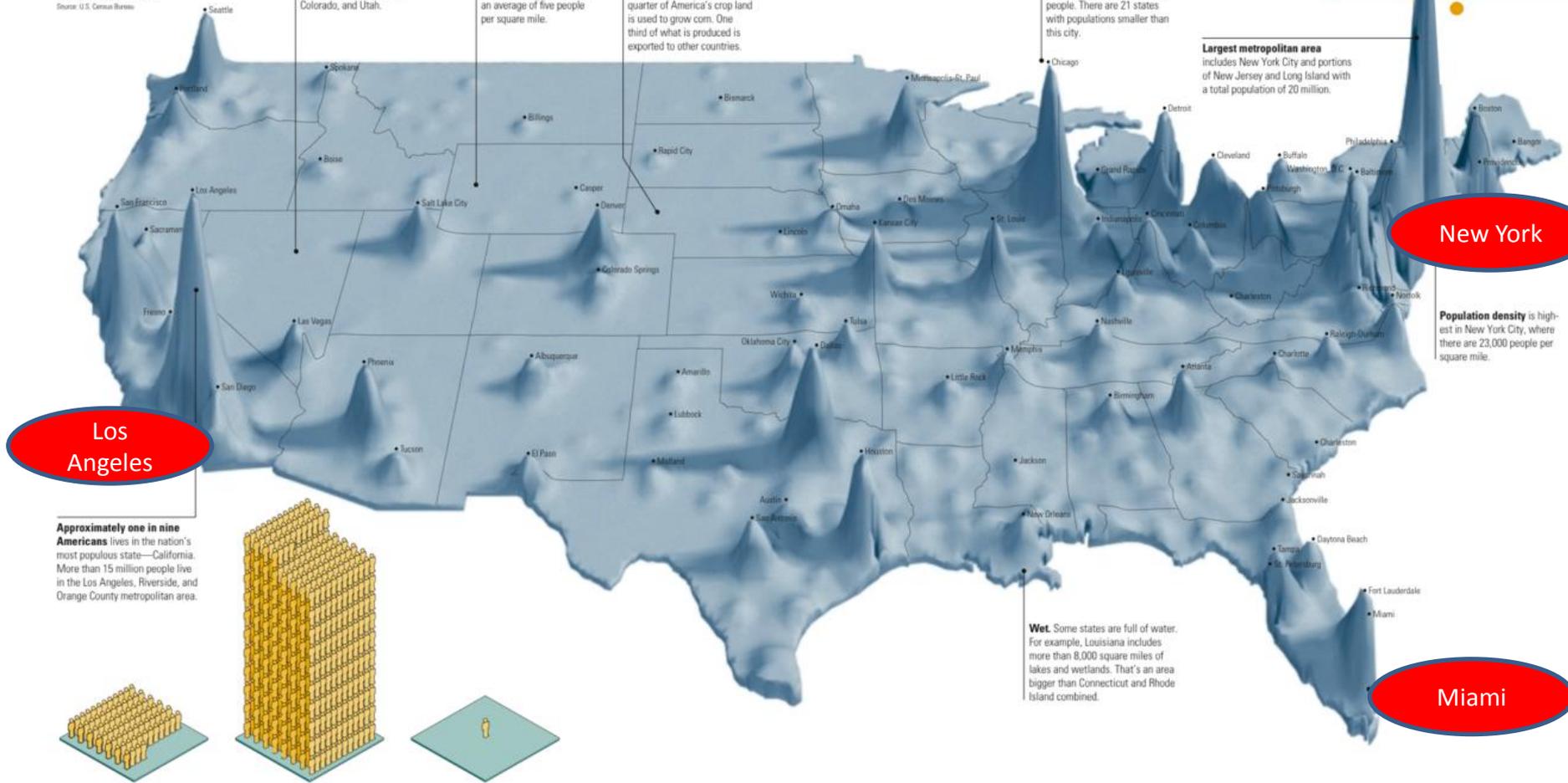
What happens in the empty spaces? Some of it is farming country. More than one quarter of America's crop land is used to grow corn. One third of what is produced is exported to other countries.

Chicago, the country's third largest city, has a population of about three million people. There are 21 states with populations smaller than this city.

Largest metropolitan area includes New York City and portions of New Jersey and Long Island with a total population of 20 million.

Population Distribution

*Where do we live?
Where don't we live?*

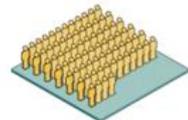


Los Angeles

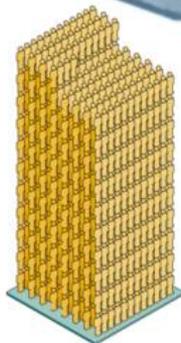
New York

Miami

Approximately one in nine Americans lives in the nation's most populous state—California. More than 15 million people live in the Los Angeles, Riverside, and Orange County metropolitan area.



Distributing our population evenly would put an average of 76 people per square mile.



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Alaska is a sparsely populated state with an average of one person per square mile.

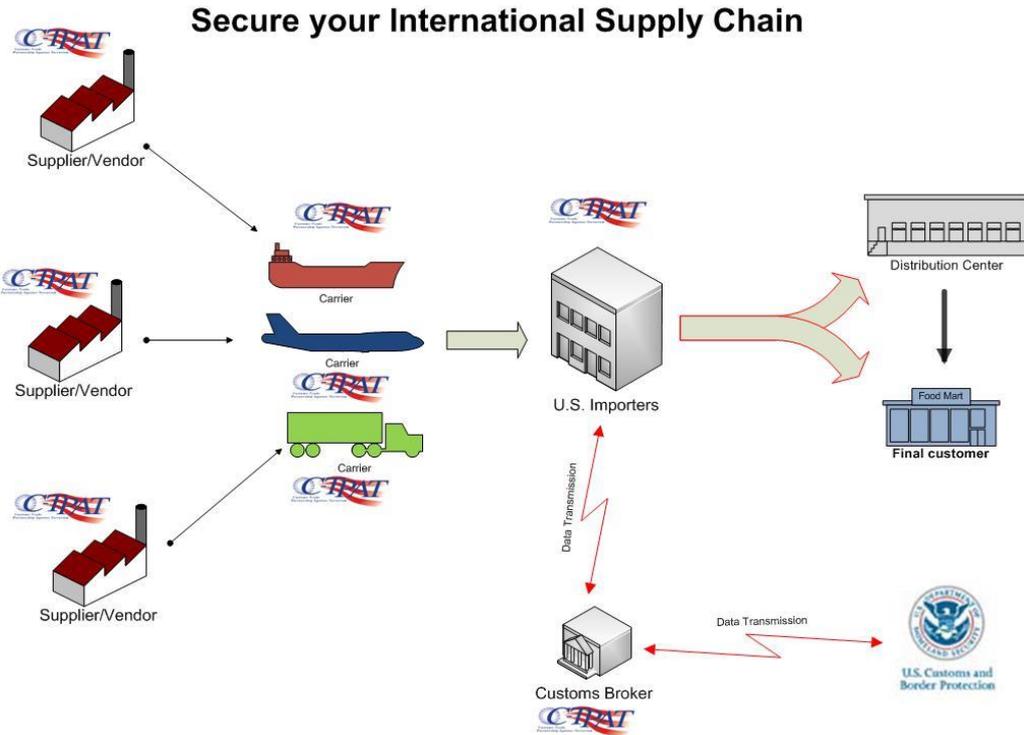
Wet. Some states are full of water. For example, Louisiana includes more than 8,000 square miles of lakes and wetlands. That's an area bigger than Connecticut and Rhode Island combined.

Population density is highest in New York City, where there are 23,000 people per square mile.

Marché US: les réglementations

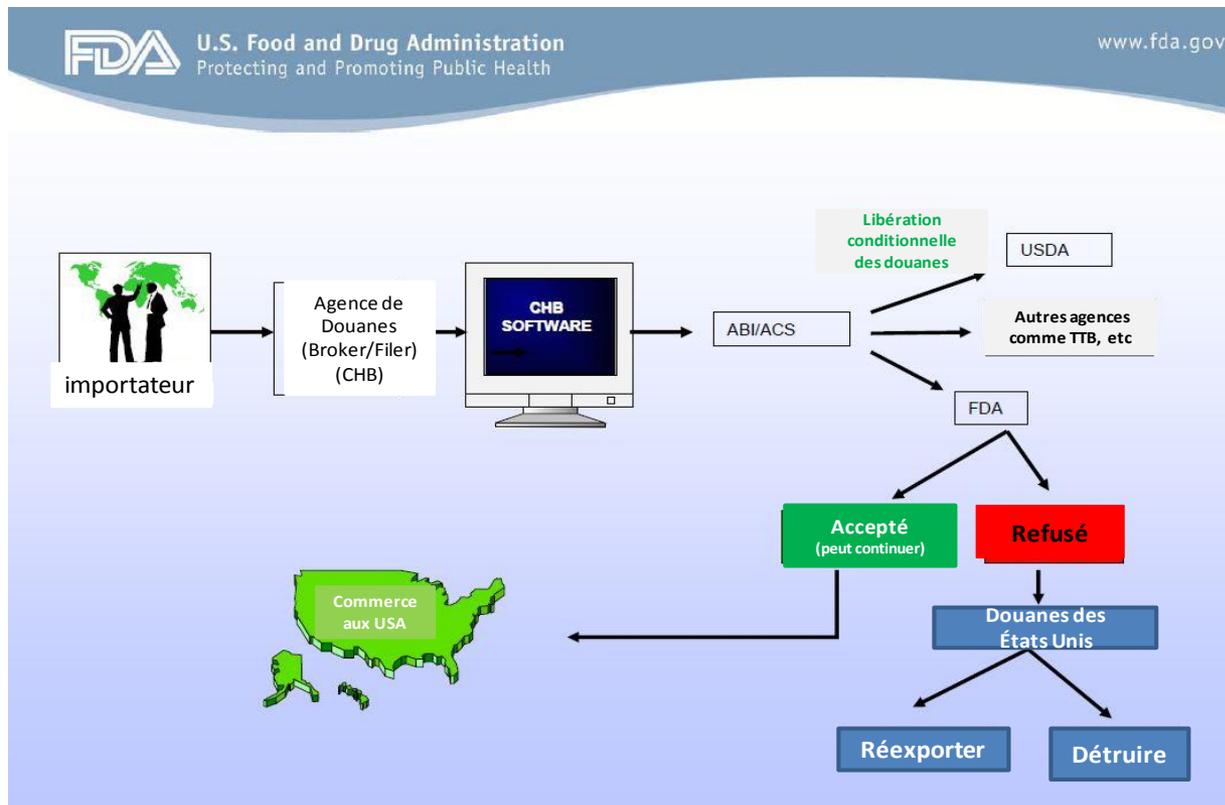
Contrôle des importations: Douanes, FDA, Dept. Commerce et Agriculture

Déclaration des envois par les importateurs au moins 24 heures à l'avance



Marché US: les réglementations

Innocuité alimentaire: FDA



Marché US: les réglementations

Authenticité

<http://www.accessdata.fda.gov/scripts/fdcc/?set=seafoodlist&sort>

Type	Acceptable Market Name(s)	Common Name	Scientific Name
V	Herring <u>or</u> Sea Herring <u>or</u> Sild	Atlantic Herring	<i>Clupea harengus</i>
V	Anchovy	Japanese Anchovy	<i>Engraulis japonicus</i>
V	Sardine	False Pilchard	<i>Harengula clupeiola</i>
V	Sardine	Redear Sardine	<i>Harengula humeralis</i>
V	Sardine	Scaled Sardine	<i>Harengula jaguana</i>
V	Herring	Panamanian Ilisha	<i>Ilisha fuerthii</i>
V	Pilchard <u>or</u> Sardine	European Pilchard	<i>Sardina pilchardus</i>
V	Sardine	Perforated-scale Sardine	<i>Sardinella albella</i>
V	Sardine	Spanish Sardine	<i>Sardinella aurita</i>
V	Sardine	Fringescale Sardinella	<i>Sardinella fimbriata</i>
V	Sardine	Orangespot Sardine	<i>Sardinella janeiro</i>
V	Sardine	Oil Sardine	<i>Sardinella longiceps</i>
V	Pilchard <u>or</u> Sardine	Japanese Pilchard	<i>Sardinops melanostictus</i>
V	Pilchard <u>or</u> Sardine	Australian Pilchard	<i>Sardinops neopilchardus</i>
V	Pilchard <u>or</u> Sardine	South African Pilchard	<i>Sardinops ocellatus</i>
V	Pilchard <u>or</u> Sardine	Pacific Sardine	<i>Sardinops sagax</i>
V	Sprat	Sprat	<i>Sprattus spp.</i>

Page Last Updated: 10/22/2014

Note: If you need help accessing information in different file formats, see Instructions for Downloading Viewers and Players.



Importateurs US de Produits Halieutiques:

Traders: Eastern Fish, Ocean Duke, Beacon Fisheries

Industries de transformation: King&rice, Pacific Seafood, Fisheries Products

Utilisateurs finaux: Legal Seafoods, Kings, Darden Restaurants



Chaînes de Distribution

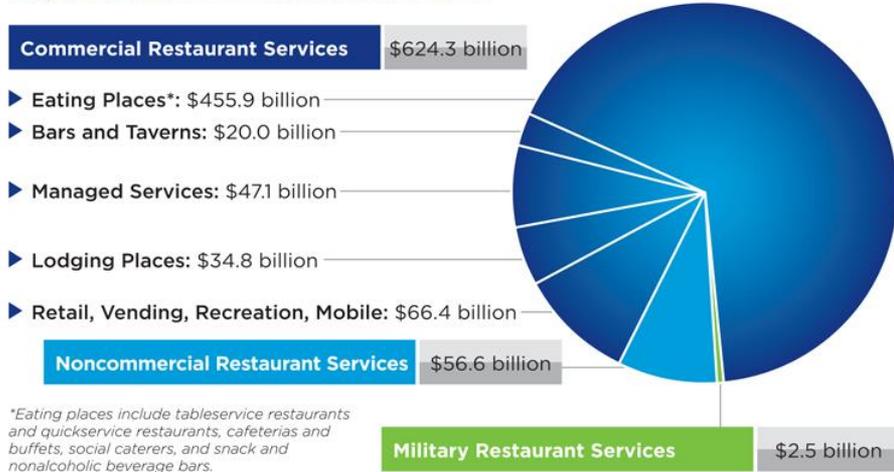
1: Restaurants

2: Acheteurs Institutionnels

3: Détaillants

Adding It All Up: \$683.4 billion

Projected restaurant industry sales in 2014



*Eating places include tableservice restaurants and quickservice restaurants, cafeterias and buffets, social caterers, and snack and nonalcoholic beverage bars.

Source: National Restaurant Association, 2014

Restaurant Industry's Share of the Food Dollar



Source: National Restaurant Association, 2014

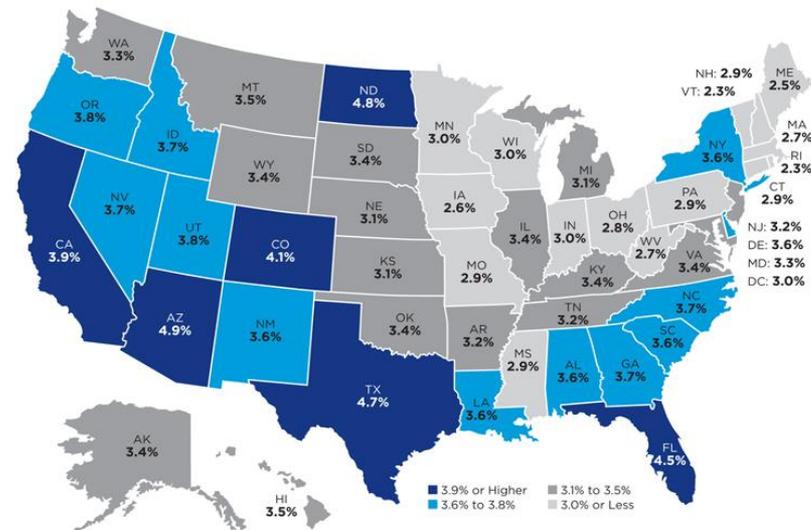
Oui, mais:
49% en 2011

Restaurant Industry Sales (In Billions of Current Dollars)



Source: National Restaurant Association, 2014

Restaurant Sales Growth in 2014 (Projected)



Source: National Restaurant Association, 2014 Restaurant Industry Forecast



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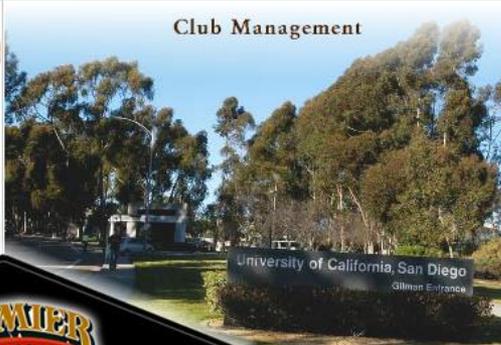
Food Service and Refreshments

Dining and Culinary Innovation:

From students at school districts and universities, to on-the-go diners at businesses and hospitals, ARAMARK offers customized food service solutions to meet all tastes and consumers.

Contract Management Services
Business & Industry - Schools & Colleges

Club Management



University of California, San Diego
Gilman Entrance



Restaurants & Concessions Management



Carriage Trade Catering
Special Events Division

Foodservice



We're all about great food. We're passionate about great service.

We're here to provide a choice of high quality, nutritious and well balanced food to meet people's needs throughout the day and throughout life.

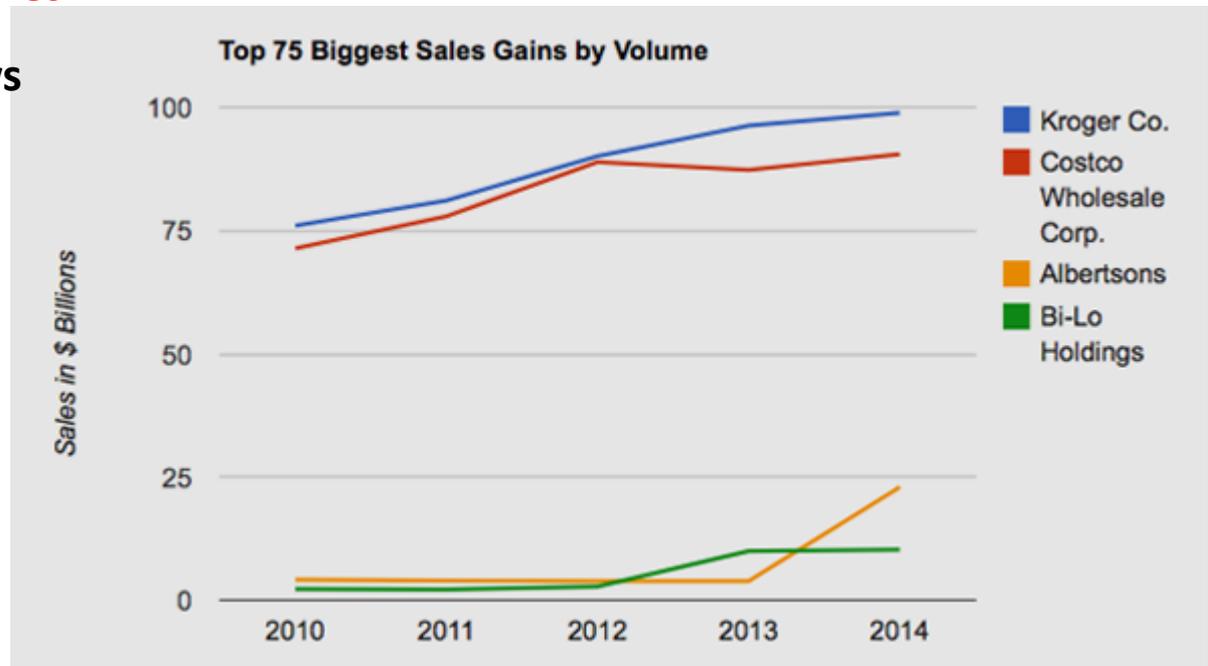
- Refreshing tired minds and refuelling the productivity of people at work;
- Helping boost the concentration of young minds at school and college;
- Meeting dietary needs to help aid recovery in hospital;
- Creating that unforgettable dinner at the event of a lifetime; or
- Providing a taste of home when you're many miles away.



<http://supermarketnews.com/product-categories/seafood>

10 plus grandes chaînes américaines

- **Wal-Mart Stores Company News**
(ventes de USD 118 milliards)
- **Kroger Company News**
- **Costco Wholesale Corp.**
- **Target Corp.**
- **Safeway Company News**
- **Loblaw Cos.**
- **Publix Company News**
- **Ahold USA Company News**
- **7-Eleven**
- **Albertsons** (35^{ème} en 2013)
Bi-Lo = 24^{ème}



Restaurant Red Lobster, Time Square New York



Épicerie Fine du *Citarella*, Broadway, New York





Poissonnerie du Citarella

<http://www.citarella.com/>



9,99 USD/lb le 17 Novembre 2014



WHOLE SARDINES

Plump, sweet & full-flavored, an absolute treat when stuffed & fried or salted & grilled.

Five to six fish are in a pound.
\$9.99 per pound.

Total

0

ADD ITEM

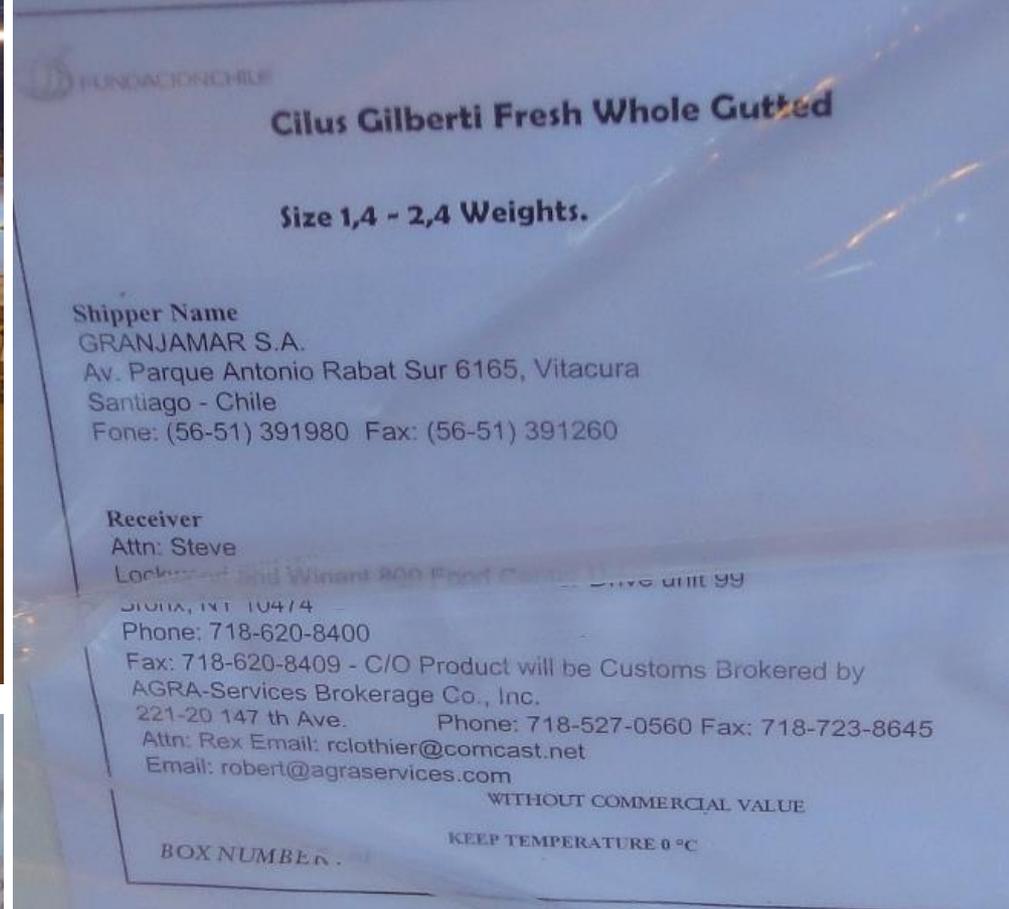
Prix actuel





Principaux acteurs du marché de produits de la mer à Los Angeles





Envoi d'échantillons

Réception à l'aéroport de New York



**Livraison des
échantillons
à un restaurant
spécialisé
“Produits de la Mer”
à Manhattan**





Dégustation
avec les
principaux
clients
potentiels:
grands
acheteurs de
New Fulton
Fish Market

4 piliers pour vendre avec succès aux USA

- 1 – Offre: bonnes pratiques de production, attestées par une tierce partie
- 2 – Ventes: prix compétitifs
- 3 - Services: livraison totale et dans les temps prévus
- 4 - Durabilité



1 – Offre

Intégrité: tout commence ici

- a) Aquaculture libre d'antibiotiques et bonnes pratiques d'engraissement
- b) classification pré-production et rejets des cas douteux
- c) Traçabilité par code barre (standards GS1)

Qualité

- a) Contrôle constant de de temps et de température
- b) Biosécurité et traçabilité
- c) Maintien de la chaine de froid durant la livraison

Innocuité

- a) HACCP, SSOP, BPF, analyses et traçabilité
- b) Points critiques de controle parfaitement définis
- c) Contrôles par tierces parties et preuves d'innocuité

2 – Ventes

Coûts dès l'origine

- a) Coûts de base dans le modèle de préparation des prix, à l'usine de base
- b) Impact des possibles taxes douanières
- c) Compter le coût d'importation, d'agence, de stockage, fret, etc..

Compétition

- a) Définition des chaînes de distribution des principaux concurrents
- b) Intelligence commerciale régulière des prix pratiqués par les concurrents
- c) Révision régulière des informations obtenues

Suivi de l'évolution du marché (par exemple analyses d'INFOSAMAK)

- a) Basé sur les bulletins bimensuels d'INFOSAMAK et analyses trimestrielles;
- b) Se localiser dans le temps et pouvoir faire des projections
- c) Données toujours comparables aux deux facteurs ci-dessus

3 – Services

Consistence

- a) Planification de la production et approvisionnement stratégique
- b) Temps de transports internationaux et bonnes pratiques de livraisons
- c) Coordination des livraisons avec des tiers

Clients (l'attention portée aux détails est la clé du succès)

- a) Ventes, promotions, bénéfiques, rabais et encouragements
- b) Commandes et factures, crédits, remboursements, subsides
- c) Rapports et informations commerciales

Connexions

- a) Connexions régionales, visites aux brokers, participation aux foires et expositions;
- b) Communication, moyens de publicité, cadeaux
- c) Gastronomie, Recherche et développement de nouveaux produits

4 – Durabilité

Environnement

- a) Emballages écologiques
- b) recyclage
- c) empreinte-carbone

Innovations

- a) Amélioration constante des installations et des procédures
- b) Développement de nouveaux produits à valeur ajoutée
- c) Emballages sous atmosphère modifiée

Responsabilité

- a) Certifications pour les installations de production;
- b) Certification sociale
- c) Certification environnementale

<http://www.seafoodexpo.com/north-america/>

seafoodexpo.com/north-america

March 15-17, 2015 | Boston, USA

Seafood Expo

NORTH AMERICA

The Seafood Marketplace for North America

EXHIBITOR INFORMATION



Conquérir un marché?

Il faut :
y aller,
tailler sa place et
s'y maintenir

شکرا