MAY 2022

# Global Snail Market Overview

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# Background

This market insight report provides an overview of the estimated global market for snails. It is the second iteration, following the first report that was published in 2018.

The report estimates market size, share of consumption, dynamics of supply and pricing. In addition, it provides a snapshot of those countries that are most integral to the global market and the current level of innovation that exists. This document is suitable for introduction to these potential markets for any client company and potential new entrants.

**Data on global snail production and consumption is incomplete, therefore figures are indicative and may not always tally.**

The report was compiled through desk research and similar to the 2018 version, IndexBox Analysis and Global Trade Atlas (GTA) data serves as the primary sources of data. A selection of tables and figures are presented with the latest reference year for most, being 2021 and are as close to actuals as possible whereas the 2018 report figures were estimates. Figures are obtained from both the available statistics and estimates according to industry publications.

**It is important to note that there will always be differences in reporting of imports and exports.** We typically emphasis the use of imports wherever possible due to the 'country of origin' rule, however there can often be discrepancies with the Eurostat members. For Example: If goods were going from Ireland to Belgium via another EU member state, then Belgium would be reporting trade based upon the last EU member country it went through and Ireland would report exports to destination of Belgium.

# Product Coverage

This market insight report first seeks to understand the Snail global market as a commodity with production data sourced from FAO statistics according to the code FCL 1176 “Snails*, not sea, fresh, chilled, frozen, dried, salted or in brine*”.

The concordance between this code and code **HS 030760 -** Molluscs; *snails, other than sea snails, whether in shell or not, live, fresh, chilled, frozen, dried, salted, in brine, or smoked, cooked or not before or during the smoking process,* is officially establised by FAOstat.

Building upon this understanding, the report explores the import and export dynamics of those downstream products which are produced from the raw snails covered under HS 030760. These products cover prepared snails and are classifed under code **HS 160558-** Mollusc preparations; *snails, other than sea snails, prepared or preserved*

Examples of these prepared products are presented later in the report to demonstrate the level of value add and innovation that exists in the global marketplace.

# Irish Snail Industry

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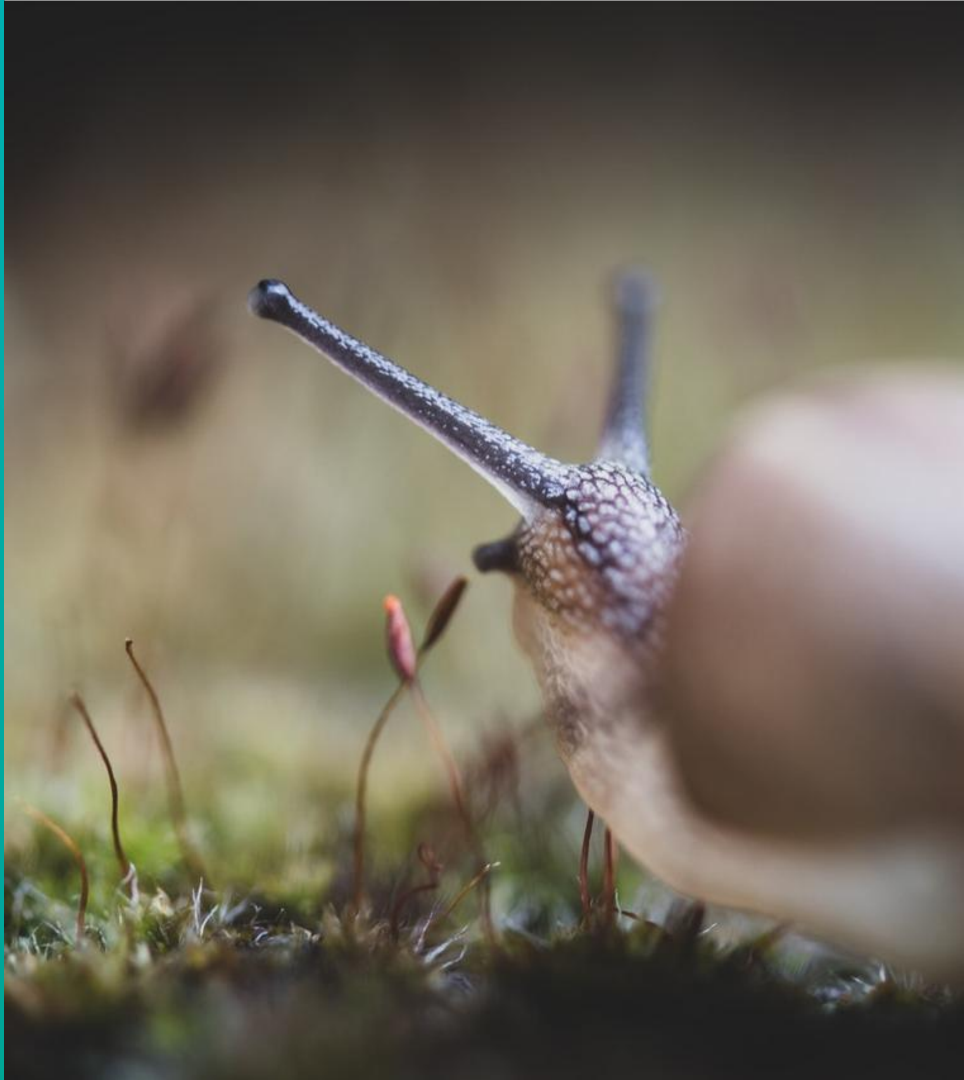


# Overview

The natural snail observed in Ireland is called the *Helix Aspersa Muller* also known as the Petit Gris. This species is one of the three most popular species on the global market, along with the *Helix pomatia* and *Helix lucorum.*

In addition to the *Helix Aspersa Muller* (Petit Gris) species which weighs approximately 8-15g, a larger size exists in the large grey snail (*Helix Aspersa Maxima*) which can weigh in at 17-25g. ‘

There are approximately 30 snail farmers in Ireland and our temperate and damp climate are particularly well suited to snail farming.

Whilst land requirment is minimal, snail farming is labour intensive requiring a lot of time and manpower particulalry for ongoing monitoring of temperature, humiduty levels and nutrition of the snails and harvesting which is completed by hand. The time required to produce 10,000 tonnes is estimated to be 2,000 hours but that is for the farming alone, not the processing or commercialisation.

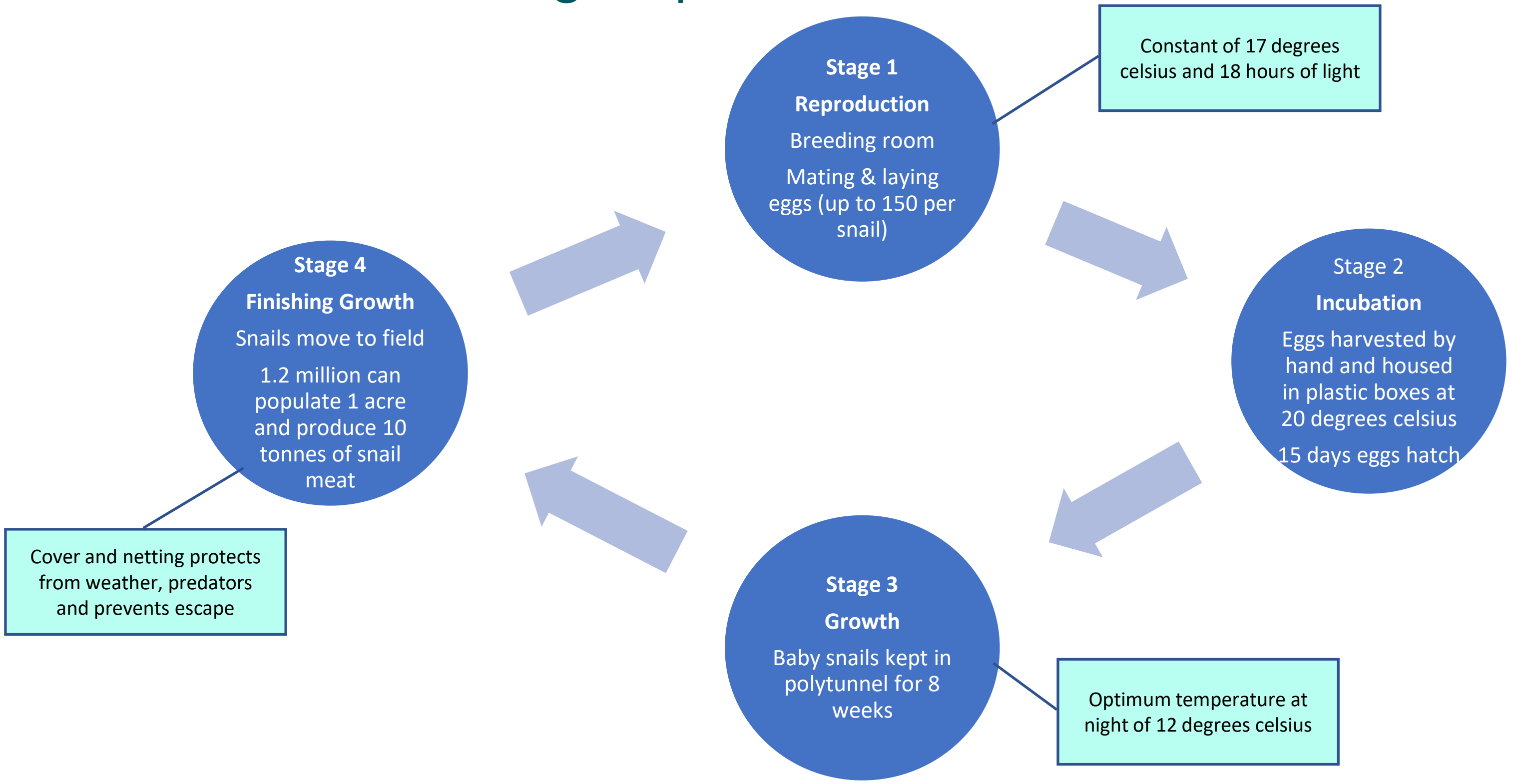
The production cycle can take approximatley 9 months from January to September.

There are many variables to success, the most important being soil type since snails prefer a damp soil (35% moisture is ideal). As soil serves as a natural source of nutrients and minerals for the snail, ideally it should have high organic matter levels and supplemented with lime to ensure good shell formation.

Mortality rates average at 20% but can vary particulalry if there are issues with predators (mice, rats or birds).

*Source: Teagasc.ie*

# **Process of Snail Farming** - topline overview

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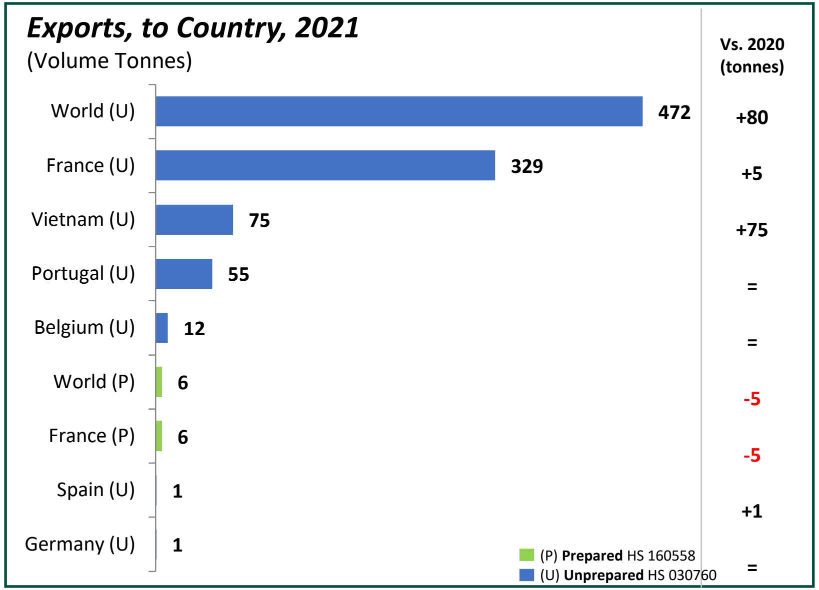
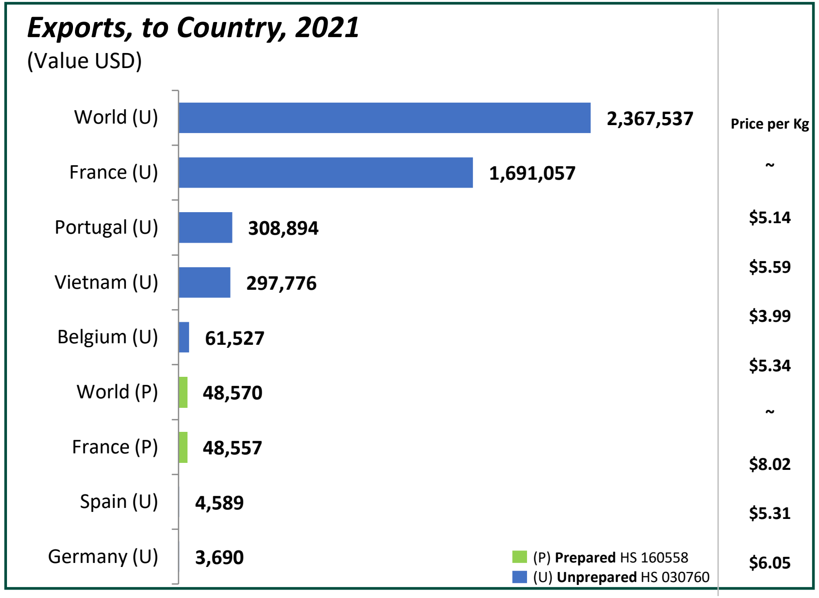
# Ireland Snail Exports 2021

## Export Volume & Value




When refering to the Import charts of international markets later on in the report, it is important to remember that there will always be differences in reporting of imports and exports. Some of the volume seen here for Irish exports, may not be classified as such by those countries reporting upon their own imports. This is due to goods travelling through other countries before they arrive at their destination and the importer reporting the last country that they travelled through.

*Source: GTA Database*

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# SWOT

## STRENGTHS

•Temperate and damp climate
•Low land requirement
•Produce available throughout winter (unlike wild snails which are harvested in April)
•Strong Irish image in key European markets for quality and farming
•Quality of Irish farmed snails
•Diversification to other farming practices

## WEAKNESSES

•Weather conditions in cold summers and harsh winters can deliver low yields
•High input costs
•Labour intensive
•Helix Aspersa Muller is no. 2 or 3 choice in key market of France
•Lack of domestic processing capability
•High transportation costs
•Classification vs. other international competitors (transportation limitations)

## OPPORTUNITIES

•Strong global market that is undersupplied
•Re-opening of foodservice and HoReCa industry
•Presence of Helix Aspersa Muller in value-add products in French retail
•"Me-Too" or disruptive value-add products for international retail
•Development of domestic snail consumption
•EU regulation to block a lot of wild picked snails
•Organic certification
•Increase of other uses for snails (leveraging no waste)

## THREATS

•Industrialisation of farming in other markets
•Supply of cheap wild snails and large scale farmed snails
•Low pricing from Eastern European and African countries
•Supply to key EU markets is almost monopolised

# Global Market Overview 2020

(Unprepared Snails HS 030760)

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# Global Market Size (HS 030760)
## Consumption Volume

Consumption of snails (except sea snails) has fluctuated over the past 5 years.

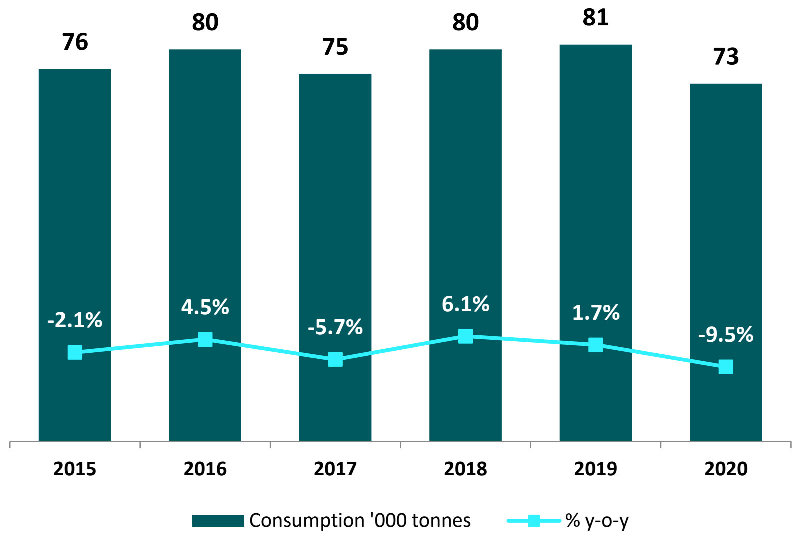
In 2019, global consumption reached a market high of 81k tonnes following a two-year rising trend from 2017.

However, 2020 saw the greatest decrease ever experienced by the market with consumption volume falling by 9.5% to 73K tonnes.

Since a significant volume of fresh snail consumption falls on the HoReCa channel, the impact was substantial, as the channel was one of the hardest hit by counter active measures and travel restrictions.

As the post-pandemic recovery begins and tourism resumes, the market is set to grow slowly, but is not forecast to reach the 2019 market high in the long term. Instead, consumption is forecast with an anticipated CAGR of +0.7% from 2020 to 2030, projecting a market volume to 79K tonnes by the end of 2030.

***Market Volume, in consumption terms, 2015-2020***
(thousand tonnes, % y-o-y)




*Source: UN data, IndexBox analysis*

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# Global Market Size (HS 030760)

## Consumption value

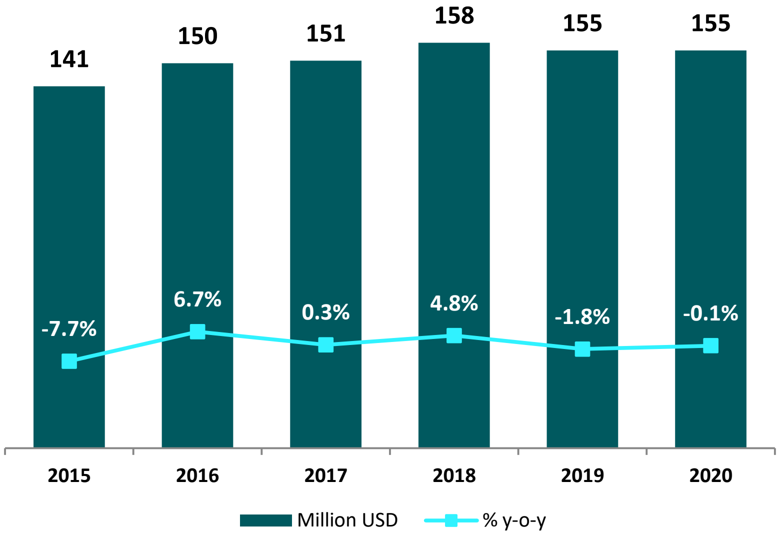
The market value prices here are captured at importer/ exporter prices as opposed to the final consumer price. These figures provide an indcation of approximate value size in what is a challenging industry to quantify.

In the last 6 years, market value peaked at $158 million, however this is still someway off the global market peak level of $193 million in 2008.

Despite the -9.5% decrease in consumption volume between 2019 and 2020, the market has done well to hold it’s value, having only experienced a very minimal decrease (-0.1%) in value versus the previous year.

***Market Value, in consumption terms, 2015-2020***

(million USD, % y-o-y)




*Source: UN data, IndexBox analysis*

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# Top 10 Consuming Countries 2020 (HS 030760)
## Consumption volume

France is the largest consumer of snails globally, accounting for approximately 31% of total consumption volume. However, from the period of 2015-2020 consumption volume contracted by -3.8%.

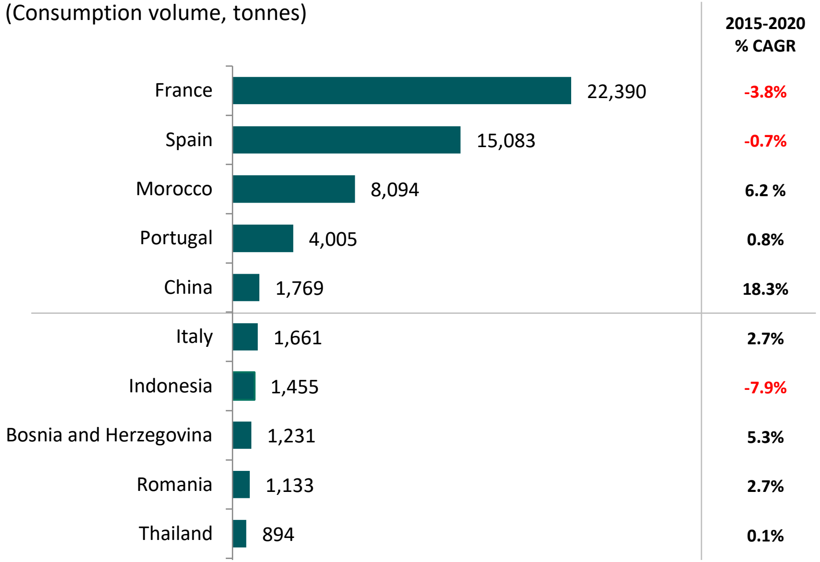
Spain is the next largest consumer of snails and double that of Morocco in third place. Outside of these countries, consumption figures start to drop off quite quickly.

The top 5 countries equate to two thirds of global consumption and whilst Italy would have previously been part of this list, China now occupies fifth place having recorded growth of 18.3% over the last 6 years.

Within this top 10, it is reported that consumption in Indonesia has experienced the biggest decline, with a contraction of -7.9%.

***Consumption, by Country, 2020***

(Consumption volume, tonnes)




*Source: UN data, IndexBox analysis*

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# Top 10 Consuming Countries 2020 (HS 030760)

## Consumption value

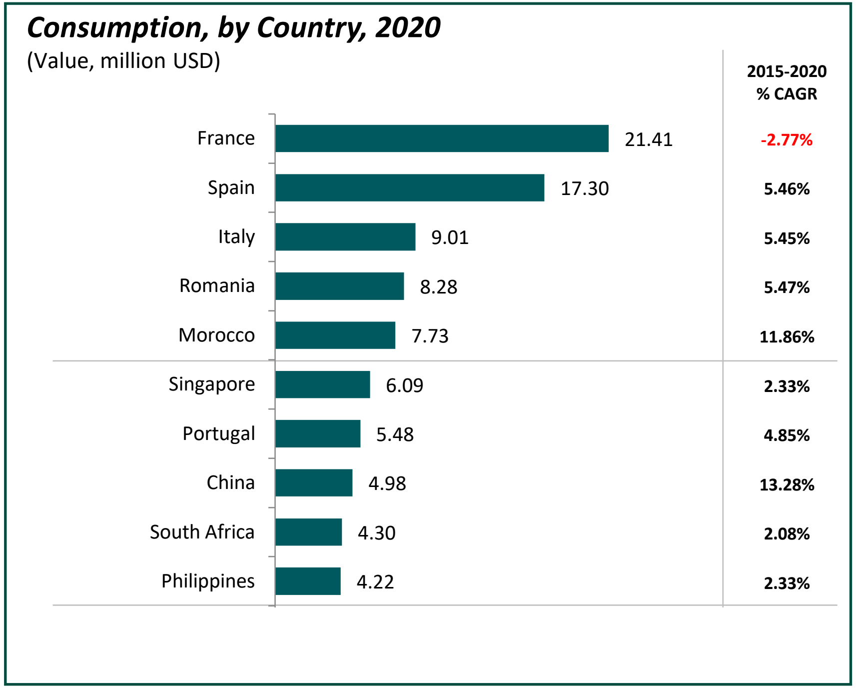
When we look at the top 10 list for consumption value, we not only see a change to the rankings but also to countries included.

The notable changes are the inclusion of Singapore, South Africa and Phillipines following the removal of Indonesia, Bosnia and Herzegovina and Thailand.

Compared to consumption volumes, consumption value is much more evenly distributed globally, demonstrating great variation in pricing.

France remains top of the list with a value of $21.41million equating to almost 14% of the consumption value globally.

Italy and Romania may be two profitable markets whereby import prices are high. Import prices in Italy however are declining, whereas those in Romania are growing.




*Source: UN data, IndexBox analysis*

# Top 10 Producing Countries 2020 (HS 030760)

The top 10 producing countries represent 75% of global production.

Morrocco alone is responsible for 25% of the world's supply, having expanded at an average annual rate of +1.6% over the period 2015 – 2020). Snail production stood at 18.4K tonnes in 2020, two and half times that of the next largest producer, Hungary (7Ktonnes).

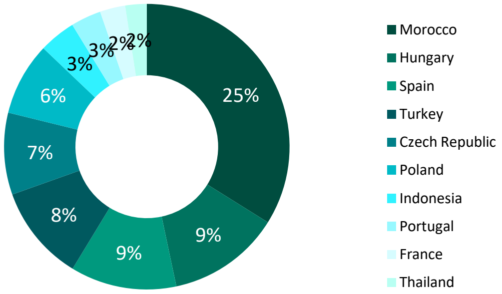
Spain occupys third position at 6.5K tonnes with an 8.9% share of global production, however of the top 3 countries, production has remained the most consistent.

France has seen the greatest growth in the period 2015-2020, having increased production by 4.1% CAGR. Yet when we refer to the country's volume need to meet consumption demand, they are producing less than 10% of their consumption needs.

Poland records the greatest contraction in production during 2015 – 2020 with a CAGR of -12.6%, three times more than the next closest contractions in Hungary and Indonesia.

***Production, by Country, 2020***

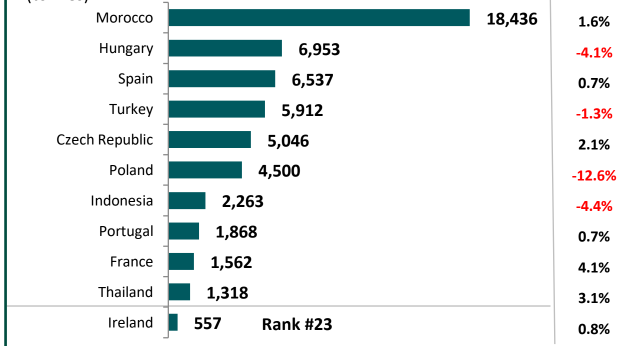
(% of global production)




**Ireland 0.76% (Rank #23)**

***Production, by Country, 2020***

(tonnes)




*Source: UN data, IndexBox analysis*

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# Imports & Exports 2021

(HS 030760 + HS 160558)

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# Top 10 Importing Countries 2021 (HS 030760)

## Import value and price per Kg USD

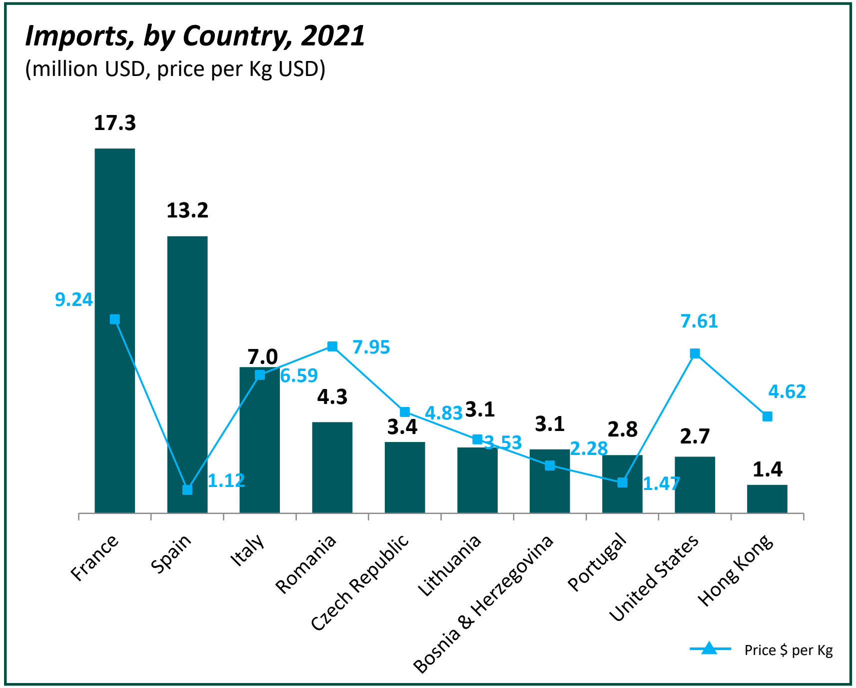
In 2021, total global imports were estimated to be valued at $68.3million.

In 2021, the top importers of Snails were France and Spain, accounting for 25.4% and 19.3% of global import value respectively.

Value of imports has increased in both markets, albeit to a greater extent in France due to a slight increase in price per kg whereas Spain saw a slight decrease in price per kg versus 2020.

Import prices are high and growing in the markets of the U.S ($7.61kg),Italy ($6.59) and Romania ($7.95). The greatest increase versus 2020 came from Bosnia +36.5% from $1.67 to $2.28 per kg.

Price paid per kg decreased across Spain, China, Czech Republic and Hong Kong.




Source: GTA Database

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# Top 10 Exporting Countries 2021 (HS 030760)

## Export value & price per kg USD

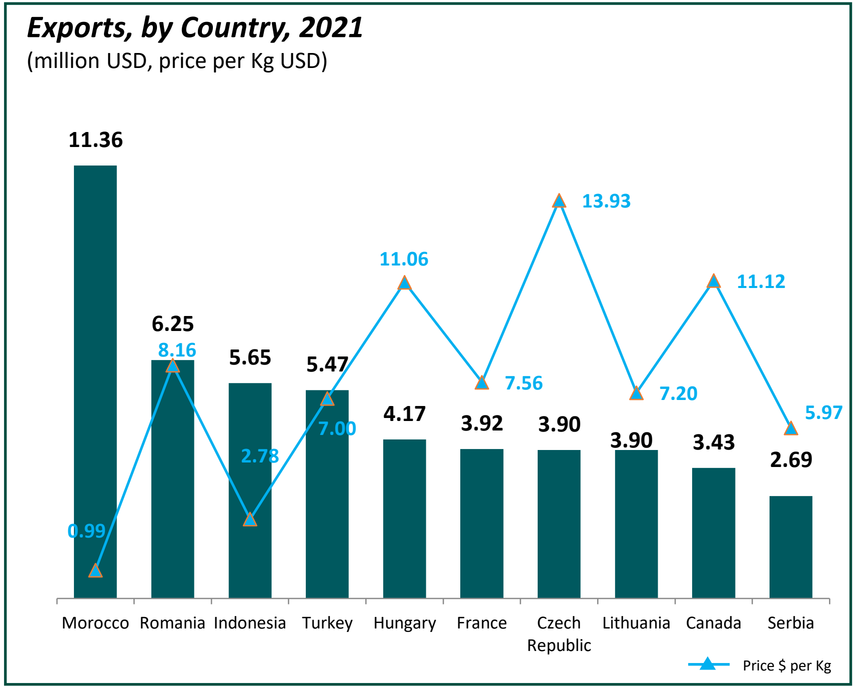
Over the last 10 years exports peaked at 30.14k tonnes in 2018 but subsequently fell over 2019 & 2020. However, 2021 saw a notable increase (+13.75% YoY) to 29.72k tonnes indicating that there may be a new peak in 2022 if this growth continues.

The value of exports in 2021 amounted to $65.6million.

Morocco remains the largest exporter of snails globally, comprimising 17.3% of global exports which equated to a value of $11.6million (increase of 17.7% vs. 2020).

Romania holds the next greatest share at 9.54% having recorded the greatest increase (+60.7%) in price paid per kg vs. 2020.

Hungary and Canada both recorded significant increases in export value compared to 2020. Likely driven by price paid per kg for Canadian exports and increased export volumes for Hungary.




*Source: GTA Database, UN data, IndexBox analysis*

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# Top 10 Importing Countries 2021 (HS 160558)

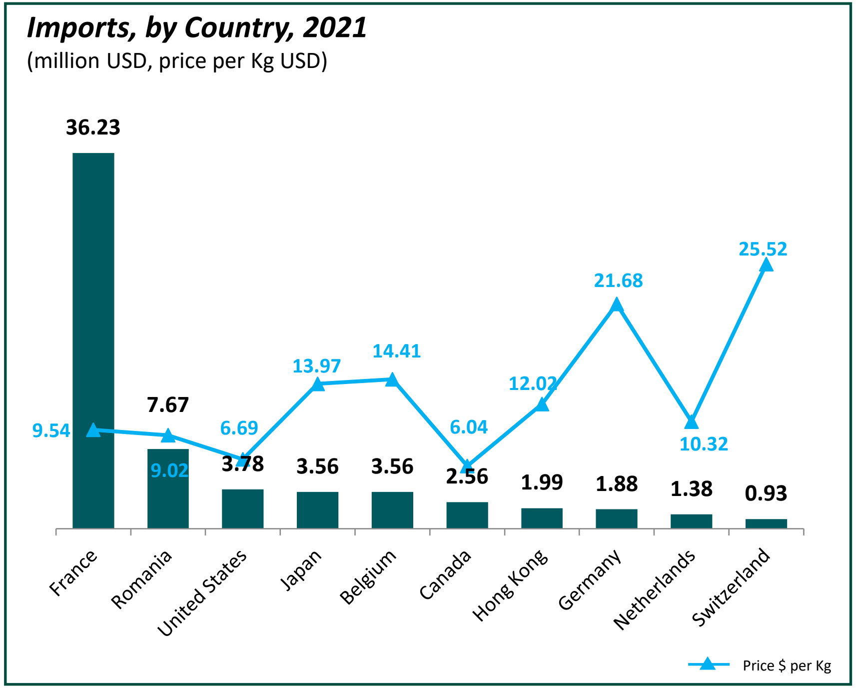
## Import value & price per kg USD

The top 10 importers of prepared snails account for 91% of global import value ($69.8 million). According to GTA data, France is the number one importer of prepared snails. In 2021 imports were valued at $36.23 million which was almost five times more than the next greatest importer by value, Romania.

Import prices can vary significantly by country for prepared product. Switzerland records the highest price paid per Kg at $25.52 whereas Canada records the lowest of the top 10 importers at $6.04.

Average price paid per kg by the top 10 importers is approximately $12.9 having increased by 8.35% or 1$ vs. 2020.

Germany (+34.7%), Switzerland (+23.9%) and Canada (+17.9%) recorded the biggest increases in price paid per kg for imports whereas the Netherlands (-12.6%) and Belgium (-7.4%) recorded the greatest decreases vs. 2020.




*Source: GTA Database, UN data, IndexBox analysis*

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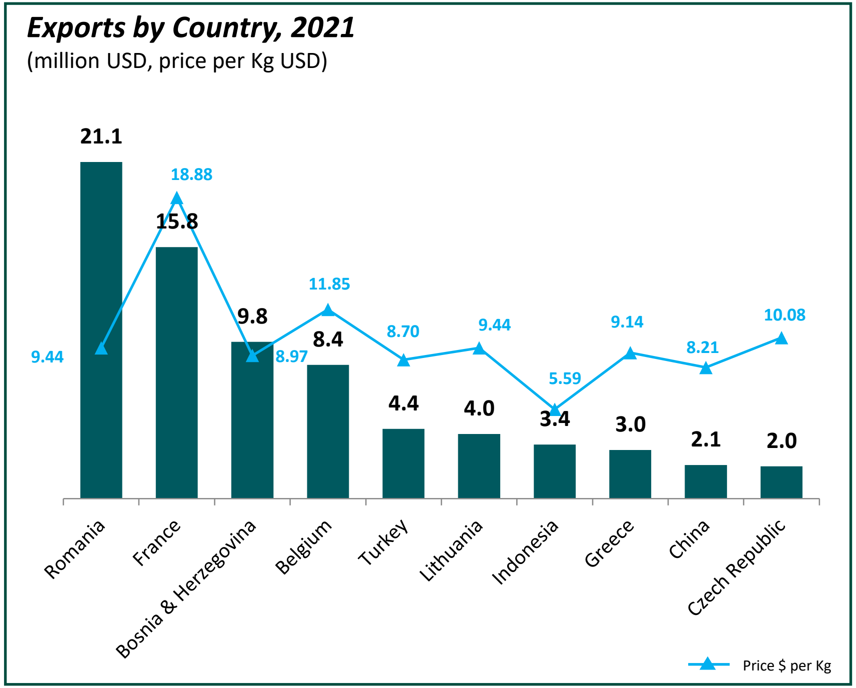
# Top 10 Exporting Countries 2021 (HS 160558)
## Export value & price per kg USD

The top 10 exporters account for 94.3% of global export value ($78.5million). According to GTA data, Romania is the greatest exporter of prepared snails with a value of $21.1million in 2021 having recorded a 22% increase in export value from 2020.

France is the next greatest exporter valuing exports in 2021 at $15.8 million up 10% vs. 2020.

Export prices also vary quite significantly by country for prepared product but the average price per kg for the top 10 exporters stood at $10 in 2020. France recorded the highest price per Kg at $18.88 whereas Indonesia receives the lowest at $5.59 in this top 10.

Czech Republic reported the greatest increase in export value vs. 2020, increasing by 459% from $362k. Only China (-42.2%) and Indonesia (-18.7%) recorded decreases in value vs. 2020.




*Source: GTA Database, UN data, IndexBox analysis*

# Prepared vs. Unprepared Imports 2021 (HS 030760 vs. HS 160558)

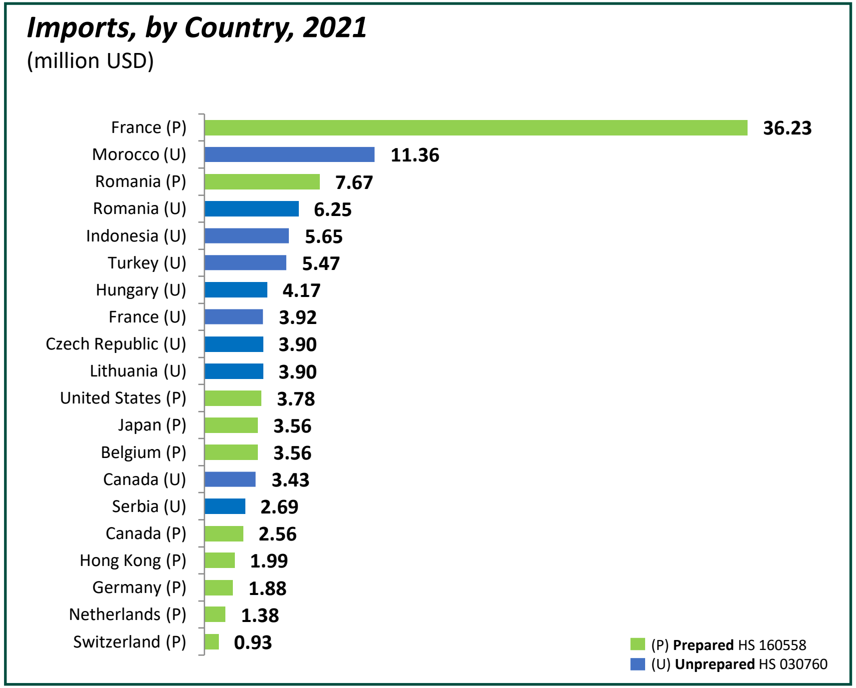
## Import value, million USD

The chart to the right maps import values for both Prepared and Unprepared snails according to trade data available from GTA.

France, Romania, Canada and the U.S are the only countries that feature as both importers of Prepared and Unprepared. France in particular are the leader in global imports across both product types, equating to a total import value of $40.2 million.

Since 2018, the Prepared snail market has been developing and whilst France remains the main destination for prepared snails, there are a number of alternative markets to consider (albeit with a lower price paid per kg).

Import volume of Unprepared snails was 3.2 times greater than that of Prepared snails. (24,155 tonnes Unprepared vs. 7,503 tonnnes Prepared). The market demand for volume lies in Unprepared, however there is significant value to be had for Prepared due to price paid per kg.




Source: GTA Database, UN data, IndexBox analysis

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# Prepared vs. Unprepared Exports 2021 (HS 030760 vs. HS 160558)
## Export value, million USD

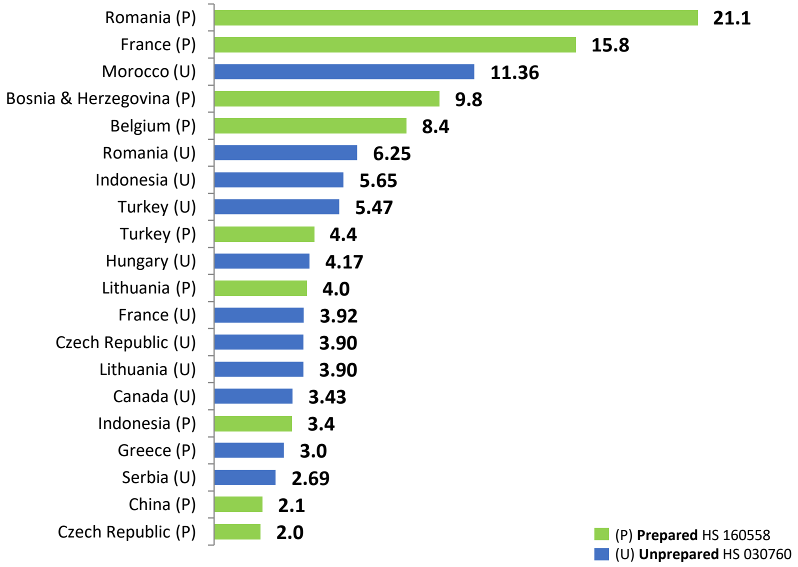
The greatest export value for snails is attributed to Prepared snails exported by Romania and France.

France, Turkey and Indonesia all feature within the top 20 list as key exporters of both Prepared and Unprepared snails.

Romania features as the leading exporter of Prepared snails in value terms, they export at a much lower price per kg than France and instead export at greater volumes – over 2.5 times more than France in 2020 (2233 tonnes).

Prepared snail exports were $12.9million greater in value than Unprepared despite being 2.7 times less in volume terms (22,884 tonnes Unprepared vs. 8,175 tonnnes Prepared).

***Exports, by Country, 2020***
(million USD)




*Source: GTA Database, UN data, IndexBox analysis*

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# Country Snapshot: FRANCE

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# FRANCE Overview

It is estimated that over 22,000 tonnes of snails are consumed in France each year, equating to 339g per person per year. Snails are mostly eaten in Alsace and Franche-Comté and to a lesser extent in Auvergne and Rhône-Alpes.

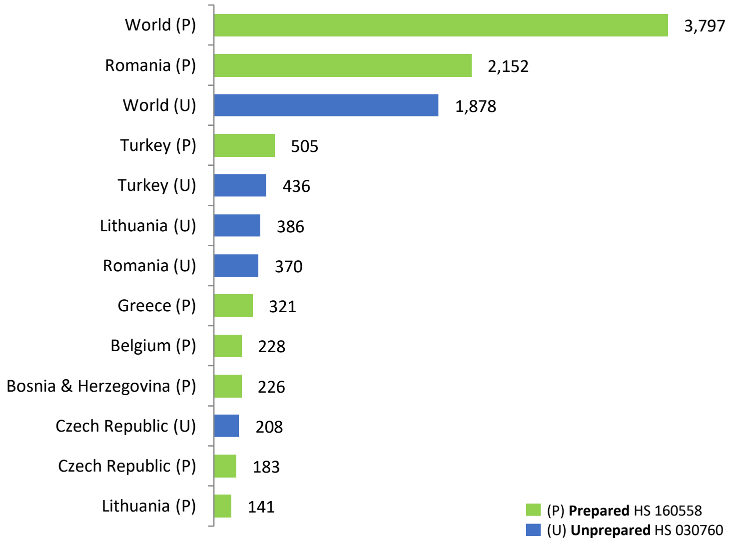
Approximately two-thirds of snails in France are consumed during the Christmas period, lending themselves as a seasonal product. Outside of this they are typically served as a starter (six to nine snails per plate) or an appertif accompaniment.

As the greatest importers of Unprepared snails, France imported approximately 22,295 tonnes of Unprepared in 2021, the majority coming from Eastern Europe. In addition, they imported 7,595 tonnes of Prepared snails in 2021.

The average import price in 2021 for Prepared was $9.24 per kg and for Unprepared it was $9.54 per kg, indicating that Unprepared snails have had some added value ahead of importing.

Romania are the largest supplier of Prepared snails to France at an average of $8.82 per kg. Turkey are the next largest and also the largest for Unprepared imports.

***French Imports of Snails, 2021***
(Volume Tonnes)




*Source: GTA Database*
*UN data, ComTrade,*
*https://worldinparis.com/escargots-in-france-snails*

# FRANCE Snail Types

Snails in France are not all Burgundy snails (Helix pomatia), the classic snail (Helix lucorum) and the small grey snail (Helix aspersa) also feature, similar to those produced in Ireland.

ADEPALE is an association for processed food companies in France. Processed snails is a category that is part of this association and there are 7 snail processors that are member companies. The data on this page is reflective of this sample not the whole market.

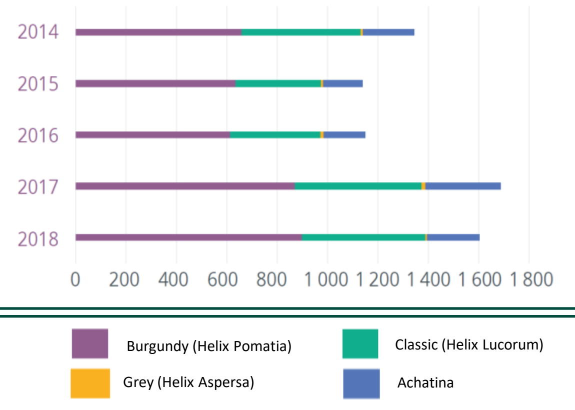
In 2018, output from these 7 companies totalled 4,041 tonnes at a value of €76 million, equating to a sales price of $18.81 per kg.

Petit Gris (Helix Aspersa) saw peak volumes in 2015, however has dropped off significantly in the years that followed. Small market for this type and likely to supplement when market volumes are low for the Burgundy and Classic species.

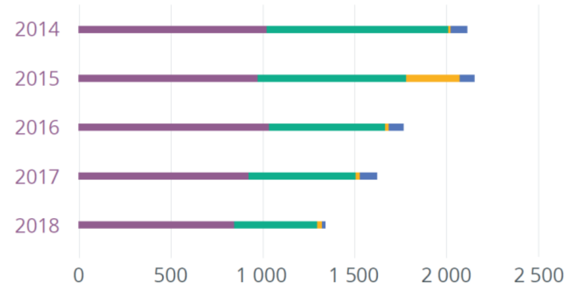
7 Member companies include:

- Bourgogne Escargots
- Croque Bourgogne
- Escal
- Francaise Gastronomie
- Grand Jean
- Romanzini
- Sabarot Wassner

***Canned Snail Volumes, 2014-2018***
(Gross tonnes)




***Prepared In-shell Snail Volumes, 2014-2018***
(Net tonnes)

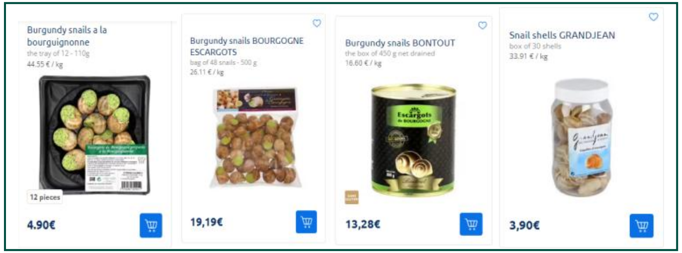



*Source: https://adepale.org/publications*

# FRANCE Retail Product Overview

There are broadly 3 types of snail products found in French grocery retail (and wholesale).

1. Stuffed snails – often in a tray or bag format across chilled and frozen
2. Snail flesh – in a canned format in a brine flavoured with herbs.
3. Snail shells – to be stuffed at home using canned snail meat




The majority of products feature Burgundy snails (Helix pomatia), there are a number of products featuring the Grey snail (Helix aspersa), particulary in the prepared tray products whereby there may be a mix of the three main snail types. Labelling of snail origin can vary with some products recording generic origins such as the E.U, others recording the specifics and some with no mention at all (only production origin).

**Mix of Snail Types**


**Large Grey Snails**


**Burgundy snails from Serbia, Bosnia, Belarus**


**EU mix snails (incl. Grey)**


**French Burgundy snails**


*Source: Carrerfour & E.Leclerc*

# Country Snapshot: SPAIN

# SPAIN Overview

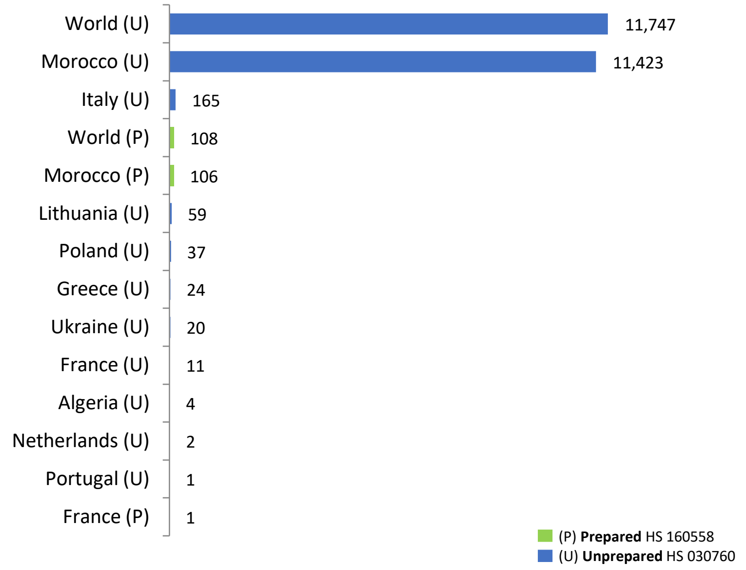
It is estimated that over 15,000 tonnes of snails are consumed in Spain each year, equating to 321g per person per year. Spain are the second largest consumers of snails behind France but is more traditional.

Heliculture (Snail farming) is claimed to have grown significantly over the last twenty years. In 2000, it was estimated that there were 26 snail farms in Spain, however by 2018 this figure is 614, of which 38% (233) are located in Andalucia. Snail farms still only contribute approx 3% of the country's consumption volume.

Spain imports almost 97% of their total volume from Morocco with almost all of it as Unprepared snails. Price per kg has increased since 2018 and was estimated to be $1.12 per kg for Unprepared in 2021.

With such a reliance on Morocco, the market is very limited for imports from other origins.

***Spanish Imports of Snails, 2021***
(Volume Tonnes)




*Source: GTA Database*
*UN data, ComTrade,*
*https://www.agroberichtenbuitenland.nl/actueel/nieuws/2018/04/25/snail-farming-expanding-in-spain*

# SPAIN Retail Product Overview

The Helix aspersa snail is highly popular in Spain as part of Mediterranean gastronomy and is known in Catalan and Spanish as the Caragol Bover snail. They belong to a category of ‘wild’ ingredients that feature prominently in traditional Catalan recipes and feature more so in the Horeca industry. They are easy to find in taverns, bars and traditional restaurants, either on their own or as an ingredient in a tapa, starter/ first course.

Products in retail are limited and much less developed than the category in France. Products tend to follow traditional recipe formulations offered in sauces or salsa. Bags, tubs, cans and jars are all present, however there is a distinct lack of tray formats as per the French market. Since our 2018 report, it appears that there have been discontinuations of SKUs within the main retailers and the category has contracted somewhat.

**Mercadona**


**El Corte Ingles**


**Eroski**


Source: https://culinarybackstreets.com/cities-category/barcelona/2021/building-blocks-38/
https://tienda.mercadona.es/
https://www.elcorteingles.es/supermercado/
https://supermercado.eroski.es/en/

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# Country Snapshot: ITALY

# ITALY Overview

Italy is a smaller market in terms of it's consumption volume which was estimated to be 1,700 tonnes in 2020. However, import values appear to be high due to the more varied and innovative uses of edible snails.

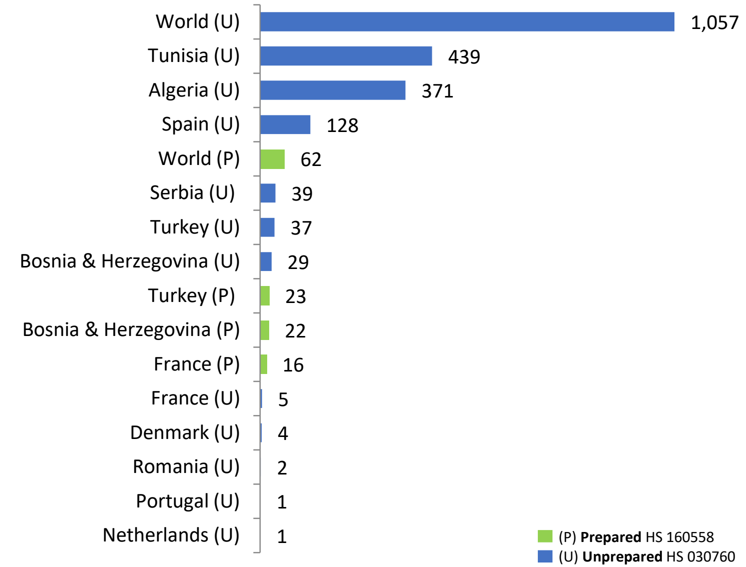
In 2019, there were estimated to be 870 farms in Italy on 500 hectares of land and about 8,900 people employed directly or indirectly.

Since 2018, Tunisia has surpassed Algeria in being the main destination for snail imports of unprepared, albeit only slightly ahead of Algeria still. However, the snails within these imports, likely originated from other origins or have gone through some level of processing (refer to appendix 5 – exports to Italy).

Unprepared snails represent the majority of imports at approximately 1,057 tonnes and the average import price in 2021 was $6.59 per kg. Prepared imports represent just 5.5% of total imports at a volume of 62 tonnes.

Since imports of Unprepared are spread across a number of markets and due to the varied use of snails, there may be further potential for Irish snails in the market.

***Italian Imports of Snails, 2021***
(Volume Tonnes)




*Source: GTA Database*
*UN data, ComTrade,*
*https://snailville.eu/sites/snailville.eu/files/IOs/IO1.A1-Snailville%20report-Italy.pdf*

# ITALY Product Overview

Among the various species of snails, the Helix aspersa is the most common species of farmed edible snail in Italy. Other types include the Burgundy (Helix poimtia) and Rigatella (Helix vermiculata). Over a 10 year period from 2010 to 2019, the consumption of snails is said to have increased by around 320%.

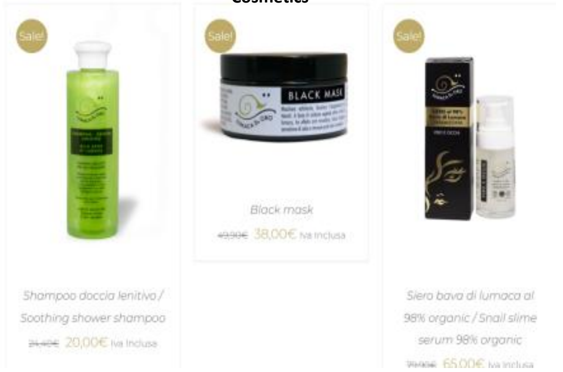
The use of snails is much more varied in Italy than in France and Spain, lending itself to high end gastronomy and also the cosmetic industry.

In high end gastronomy, snail eggs are used to make caviar products. La Lumaca Madonita is Italy’s largest snail farm, located in Sicily and they produced jarred, fresh snail eggs which are eaten raw like caviar. Their Caviale di lumaca product retails for about $1,900 per kg due to the intensive process it takes to farm them and they supply to Russia, Switzerland and the UAE. The process can take 150 days and one snail may lay between 50-100 eggs, which need to be harvested one by one using tweezers.

Other companies harvest snail slime to use within cosmetic products. Lumaca de Oro produce snails for edible use but also produce a range of cosmetics (masks, oils, shampoos) leveraging the regenerative propoerties of snail slime. In both instances they use the Helix aspersa.

**Caviar**


**Cosmetics**




Source: https://snailville.eu/sites/snailville.eu/files/IOs/IO1.A1-Snailville%20report-Italy.pdf
https://modernfarmer.com/2019/09/italys-snail-breeding-scene-picks-up-the-pace/
https://www.lumacadeoro.com/en/shop-eng/

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# Country Snapshot: OTHERS

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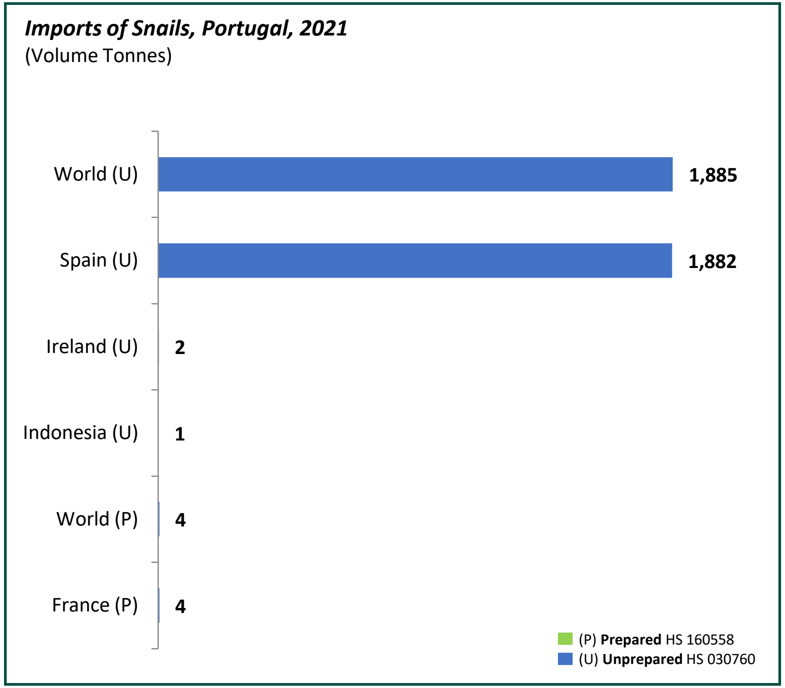
# PORTUGAL Overview

Snails in Portugal are known as Caracois and consumption is very traditional, particularly in Lisbon and the South. They tend to be a seasonal product, typically consumed during the summer period. A popular accompaniment to a beer, they are served in cafés and cooked in garlic and oregano.

There is little demand for imports of Prepared snails and the market for Unprepared is monopolised by Spain. Almost all imports of Unprepared are sourced from Morocco at a reported price of $1.28 per kg.

According to GTA data, Ireland is the next largest importer with imports at approximately 2 tonnes. This volume however, may only reflect the amount that is transported direct to Portugal, since Ireland reported exports of 55 tonnes to Belgium in the same year. The balance of 53 tonnes was likely transported via other member states, namely Spain.

The challenge may be in increasing Irish exports to Portugal in light of competitive pricing per kg for Spanish exports.




Source: UN data, ComTrade

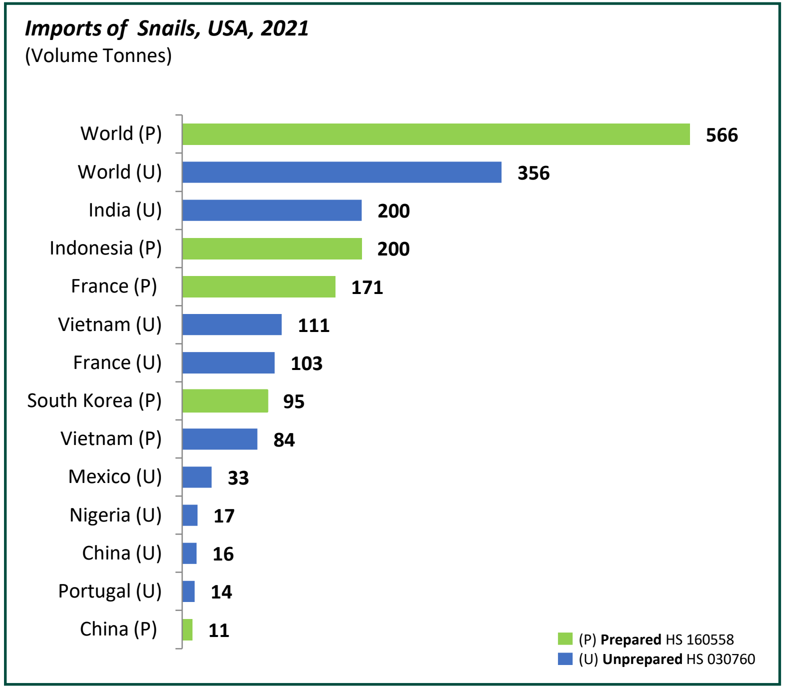
# USA Overview

There are very few snail farms in the U.S as snails (including edible snails) are considered to be invasive species. The USDA (U.S Department of Agriculture) has strict regulations for snails and it is illegal for restaurants to not only import live snails for human consumption but also to transport across state lines.

Despite these restrictions, consumption of snails has risen over the last few years and is estimated at 584 tonnes in 2020. Primarily consumed in restaurants, the USDA restrictions present challenges, meaning that snails are likely served from a can.

Whilst Prepared snails are the main import to the market at an average price of $14.67 per kg, there are still large quantities of Unprepared with an average price of $6.58 per kg, which we might assume have had some level of added value applied. France and Vietnam are two key markets as the U.S is importing both types of snails from these countries.

The U.S imports both types from a number of different countries, therefore there may be an opportunity to supply what looks to be an open market. In addition there may be a foodservice opportunity for Irish snails to explore further.




*Source: UN data, ComTrade*
*https://escargot-world.com/snail-farming-on-the-rise-in-the-usa-2020/*
*https://www.foodandwine.com/news/snail-farms-united-states*

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# BELGIUM Overview

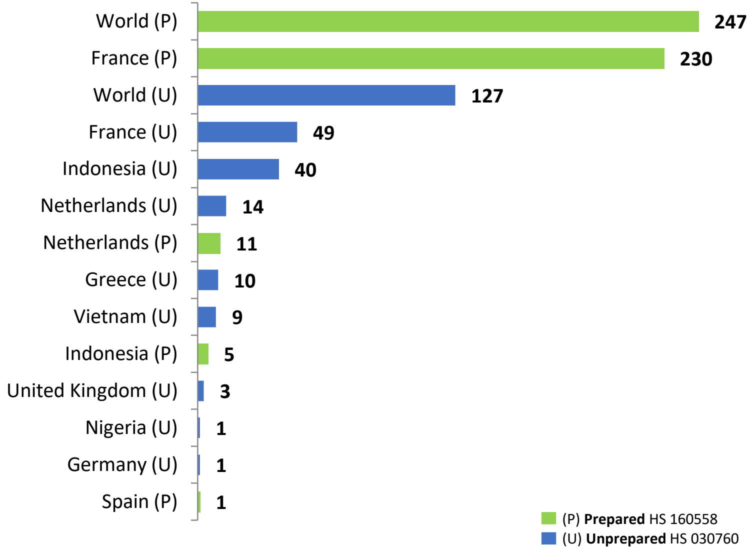
In 2020, consumption was estimated to be 371 tonnes and whilst lower than some of the other countries featured, it is still a sizeable figure due to a population of approximately 12 million people.

Domestic production alone (662 tonnes Unprepared) surpasses domestic consumption demand. *Escargotiere de Warnant* snail farm supplys a considerable amount of the market with an annual output of 800,000 snails. They have produced some interesting dishes with their snails including snail profiteroles and a snail and beer pate in collaboaration with a local brewery.

Belgium is the 5th largest importer of Prepared snails globally (average $13.16 per kg) with the majority sourced from France ($14.89 per kg), however they are active in imports of both types.

According to GTA data reported by Ireland, exports of 12 tonnes of Unprepared snails went to Belgium in 2021 but aren't reported upon as imports. These are likely being imported via France or possibly the Netherlands and are classified as such. Whilst Belgium reported 3 tonnes of imports from the U.K in 2021 these likely originated from another origin, since the U.K reported no direct exports to Belgium in the same year.

***Imports of Snails, Belgium, 2021***
(Volume Tonnes)




*Source: UN data, ComTrade*
*https://theculturetrip.com/europe/belgium/articles/why-you-should-visit-a-snail-farm-in-belgium-seriously/*

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# VIETNAM Overview

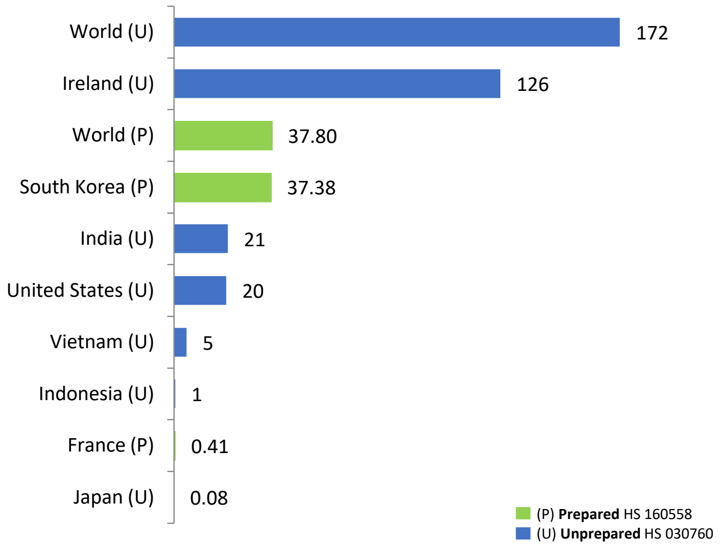
In 2020, consumption was estimated to be 224 tonnes and with production estimated at 384 tonnes.

In 2021, Vietnam reported imports of 126 tonnes of Unprepared snails from Ireland, representing 73% of total Unprepared imports. This was was reported to have increased 12 fold from 10.27 tonnes in 2020 but fell from $4.65 per kg in 2020 to $4 per kg in 2021. However, there is some discrepancy between what is reported by Ireland in terms of exports to Vietnam (74.7 tonnes).

Imports from India halved compared to 2020 (down from 42 tonnes), paving the way for a new supplier to the market, the United States (20 tonnes in 2021).

Imports of Prepared snails dramatically fell from 83.6 tonnes in 2020 to just 37.8 tonnes in 2021. The overwhelming majority of which sourced from South Korea (at $2.54 per kg) and the small remainder sourced from France (at $6.31 per kg). In addition, the U.S reported Prepared snail exports of 3.8 tonnes (appendix 5) to Vietnam in 2021, which is not reflected in the Vietnam's import reporting.

***Vietnam, Imports of Snails, 2021***
(Volume Tonnes)




*Source: UN data, ComTrade*
*https://theculturetrip.com/europe/belgium/articles/why-you-should-visit-a-snail-farm-in-belgium-seriously/*

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# New Product Launches

January 2019-2022

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# Overview

•There have been approximately **30** new product launches over the last 3 years throughout Europe.

•Launches have taken place in **11** countries.

•**Half** of all launches have been launched in France.

•**14** products have been launched under private label (almost 50%), with the remainder under private brands.

•The tray format is most popular with **16** launches.

•The majority of products target the sharing occasion (i.e. Hors d'oeuvres/Canapes) and are still very **traditional.**

•There are **3** core themes to these product launches (Canapes/ Sharing Trays/ Flavoured sauce or brine)

*Source: Mintel GNPD Snails Jan 2019- Jan 2022*

# Hors D’oeuvres/ Canapes

€4.50 / $5.09 160g


€15.95 / $17.93



€3.75 / $4.17

190 g


€3.95 / $4.48 190 g


€2.99 / $3.62 170 g


€3.99 / $4.50 170g

*Source: Mintel GNPD Snails Jan 2019- Jan 2022*

# Sharing Tray

€5.60 / $6.35 89 g


€5.90 / $6.72 202 g



€15.90 / $19.49 624 g

€7.95 / $8.75 220 g


€5.95 / $6.79 72 g


€1.95 / $2.19 89g


€2.99 / $3.40 65g


BYN13.95 / $5.65 / €4.88


BYN5.93 / $2.91 / €2.56

*Source: Mintel GNPD Snails Jan 2019- Jan 2022*

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# Flavoured Sauce/ Brine


DKK60.00 / $9.63 / €8.07 110 - 115 g

Eastern style sauce


UAH169.00 / $6.06 / €5.05

180 g

Dijon style sauce


UAH359.00 / $13.31 / €11.77

300 g

*Source: Mintel GNPD Snails Jan 2019- Jan 2022*

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# Looking Ahead

1

An undersupplied global market presents opportunity, however the challenge is that in the key EU markets for consumption, supply is often monopolised.

For existing trade in these key markets of consumption, relationship development may help to facilitate growth in contract volumes. Supply may also be boosted by the reopening of the HoReCa industry across the continent, particularly in those markets whereby snail consumption is primarily within the foodservice channel (i.e. Spain and Portugal).

2

A number of alternative export markets continue to develop and appear to be more open and competitive than the key EU markets (FR, ES, IT).

Whilst these alternative markets are smaller in demand, they may be better suited if one or two contracts could be secured for total farm output, given our domestic output and high transportation costs. Markets such as the US, Vietnam and Belgium to a certain extent could offer potential.

3

The U.K are similar to our domestic industry in that they export more than they import. Given the impact of Brexit and trade challenges, an import substitution opportunity may exist in those markets whereby both Ireland and U.K are supplying.

France and Spain were the key export markets for the U.K in 2019, however they also exported to Portugal, Italy and Belgium. Domestic supply is also exported to these key EU markets and may crossover at certain points within the supply chain but Ireland could offer favourable trade agreements.

4

**The processed, prepared and value- add snails market offers considerable value however, the Irish industry is restricted by a lack of processing capability.**

Retail products remain traditional and are more limited in markets outside of France (whereby good presence of Helix Aspersa Muller in value-add products). This could present two opportunities; 1) It may be easier to break in with “me-too products” 2) There is an opportunity to innovate and disrupt. Either way, investment will be required in the development of processing facilities or to potentially partner with an international processor. Whilst there are still new products launched, it must be noted that in some markets (i.e. Spain & UAE) there is evidence of category contraction for these types of products in retail.

5

**The snail farming process in Ireland is essentially a completely organic process however, there is no certification system in place for Irish snail farms.**

The development of an Organic certification scheme for heliculture would offer a point of differentiation in the international marketplace particularly in France whereby the majority of snails consumed are wild picked snails and also due to the well developed organic food and drink market. An Organic certification could help to underpin a more premium price positioning and seek to command a higher price per kg.

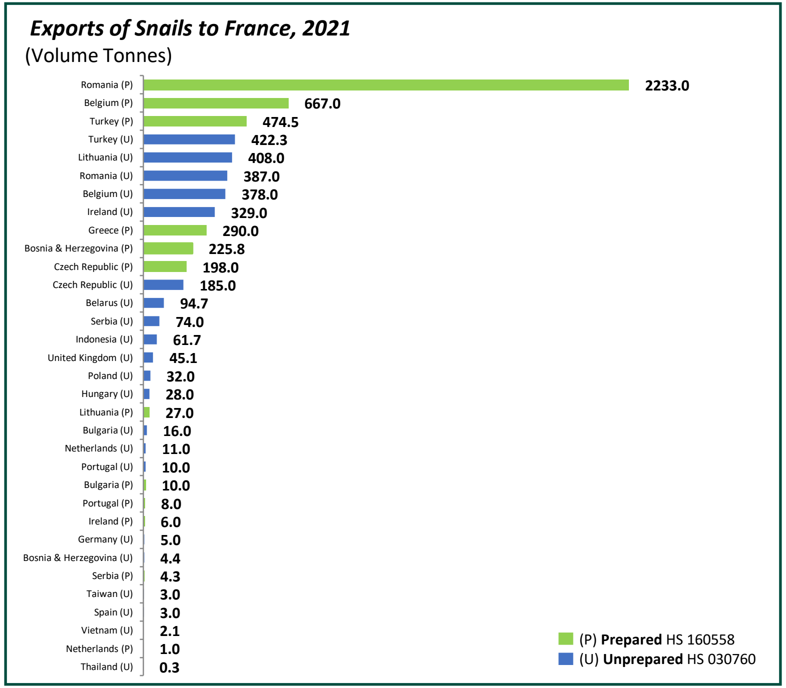
6

**The domestic market should continue to be developed both for consumption but also as an industry so that farming practices can improve, scale and evolve.**

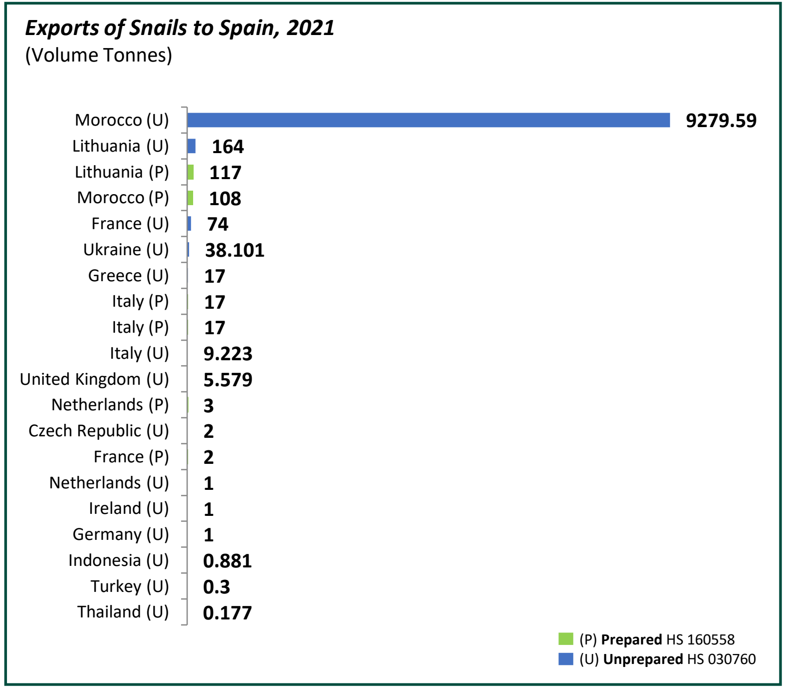
In the longer term, larger scale farming may present opportunities not only for larger supply volumes and contracts but for processing and innovation whereby the whole snail may be utilised e.g. eggs for Caviar or snail slime for cosmetic products.

# Appendix

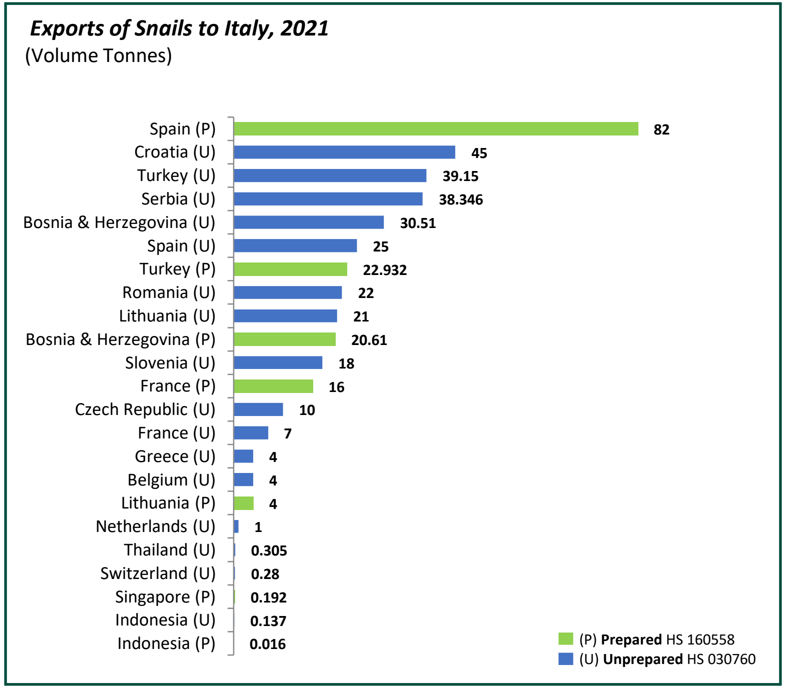
## Appendix 1




## Appendix 2

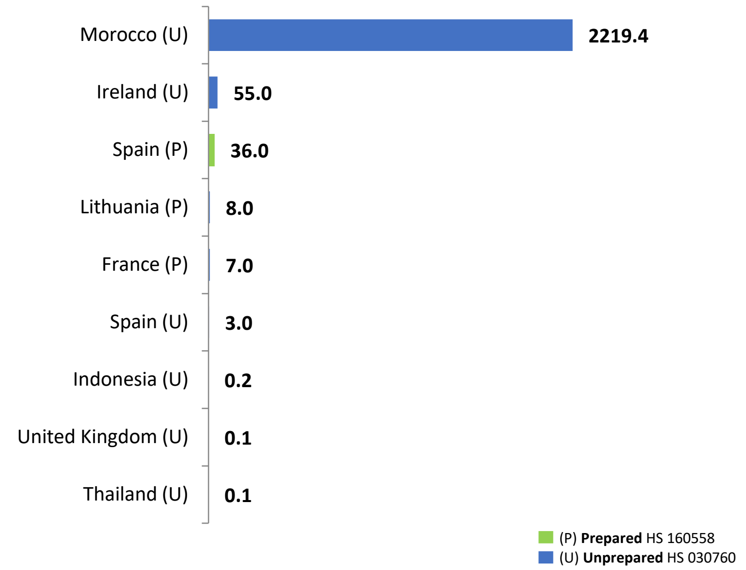


## *Appendix 3*


Exports of Snails to Italy, 2021
(Volume Tonnes)
Spain (P) 82
Croatia (U) 45
Turkey (U) 39.15
Serbia (U) 38.346
Bosnia & Herzegovina (U) 30.51
Spain (U) 25
Turkey (P) 22.932
Romania (U) 22
Lithuania (U) 21
Bosnia & Herzegovina (P) 20.61
Slovenia (U) 18
France (P) 16
Czech Republic (U) 10
France (U) 7
Greece (U) 4
Belgium (U) 4
Lithuania (P) 4
Netherlands (U) 1
Thailand (U) 0.305
Switzerland (U) 0.28
Singapore (P) 0.192
Indonesia (U) 0.137
Indonesia (P) 0.016
(P) Prepared HS 160558
(U) Unprepared HS 030760

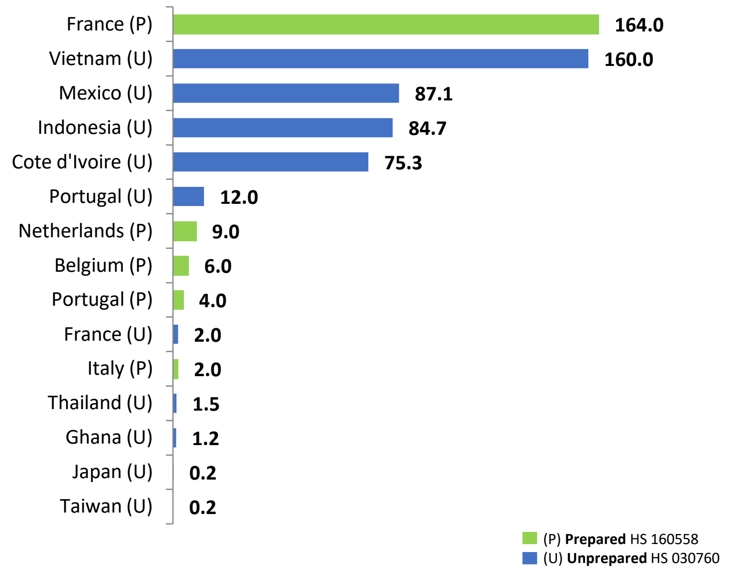
## *Appendix 4*

***Exports of Snails to Portugal, 2021***
(Volume Tonnes)




## *Appendix 5*

***Exports of Snails to USA, 2021***
(Volume Tonnes)

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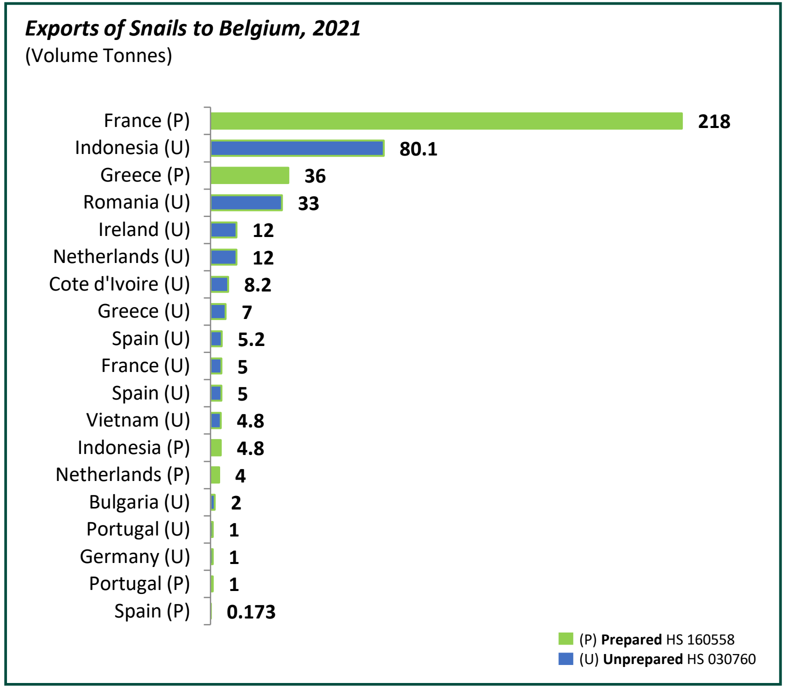
## *Appendix 6*




## *Appendix 7*