



RÉPUBLIQUE  
FRANÇAISE

*Liberté  
Égalité  
Fraternité*



FranceAgriMer

ÉTABLISSEMENT NATIONAL  
DES PRODUITS DE L'AGRICULTURE ET DE LA MER

DATA

# The fisheries and aquaculture sector in France (2021)

Production - Firms - Trade - Consumption



# SUMMARY

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## Production page 2

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France in the EU-28 & in the world in 2017  
Total sales of fisheries and aquaculture products  
Sales of fisheries products at auction  
Sales of aquaculture products  
Fishing fleet  
Aquaculture firms  
Jobs

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## Firms page 14

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Fishmonger firms  
Trading firms  
Processing firms

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## Trade page 18

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Supply balance  
Imports and exports by main species  
Imports and exports by presentation  
Imports and exports by species group  
Imports and exports by geographical area

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## Consumption page 24

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Supply balance  
Households purchases  
Catering purchases  
Breakdown of purchases by distribution channel



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# PRODUCTION

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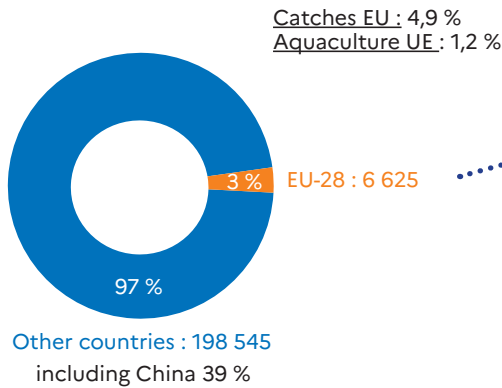
## FISHING FLEET / AQUACULTURE FIRMS / JOBS

Total sales of fisheries and aquaculture products

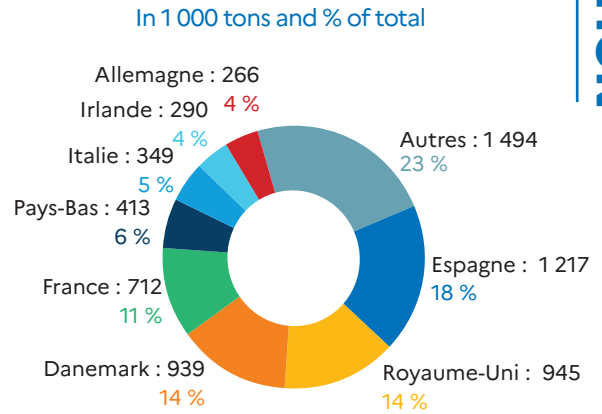


# • Total sales / metropolitan France and overseas territories

## France in the EU-28 and in the world in 2017



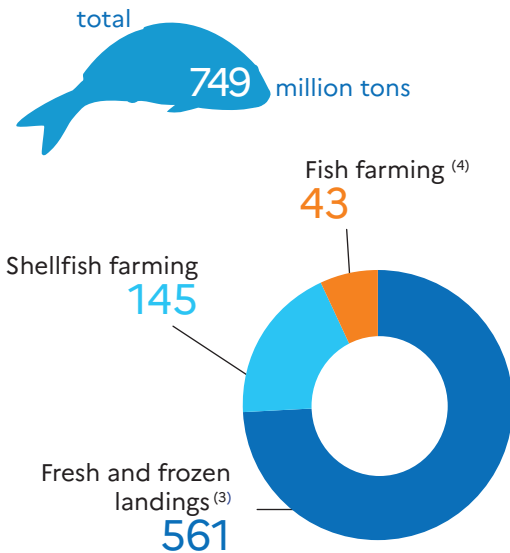
Source : FAO



Source : Eumofa

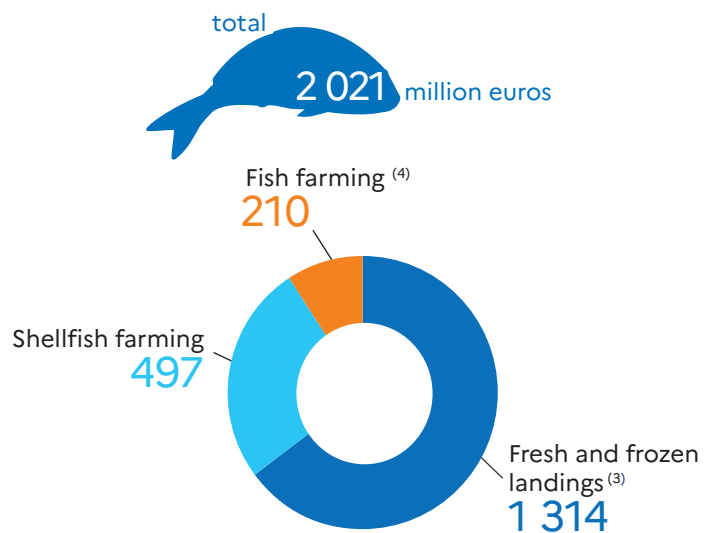
## Quantities sold in 2018 <sup>(1)</sup>

by method of production (1 000 tons) (2)



## Values of sales <sup>(2)</sup>

by method of production (millions euros)



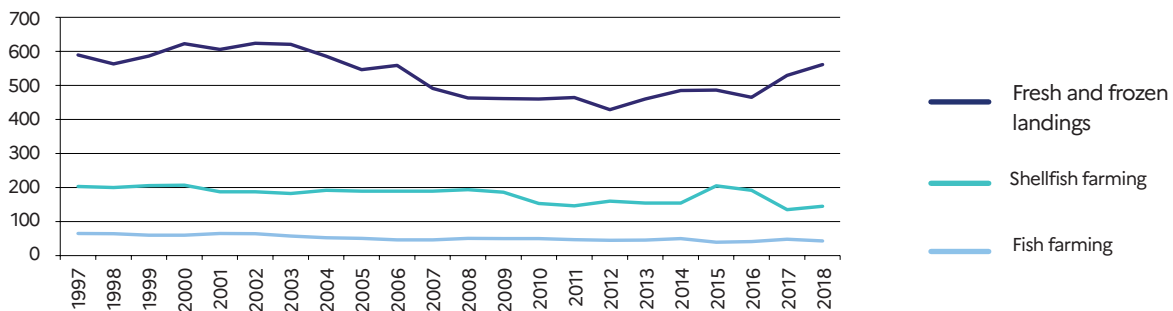
(1) Excluding seaweeds - (2) Equivalent live weight - (3) Total sales to processing industry and export sales - (4) Including farmed crustaceans

Source : MAA /DPMA/Eumofa

# • Total sales / metropolitan France and overseas territories

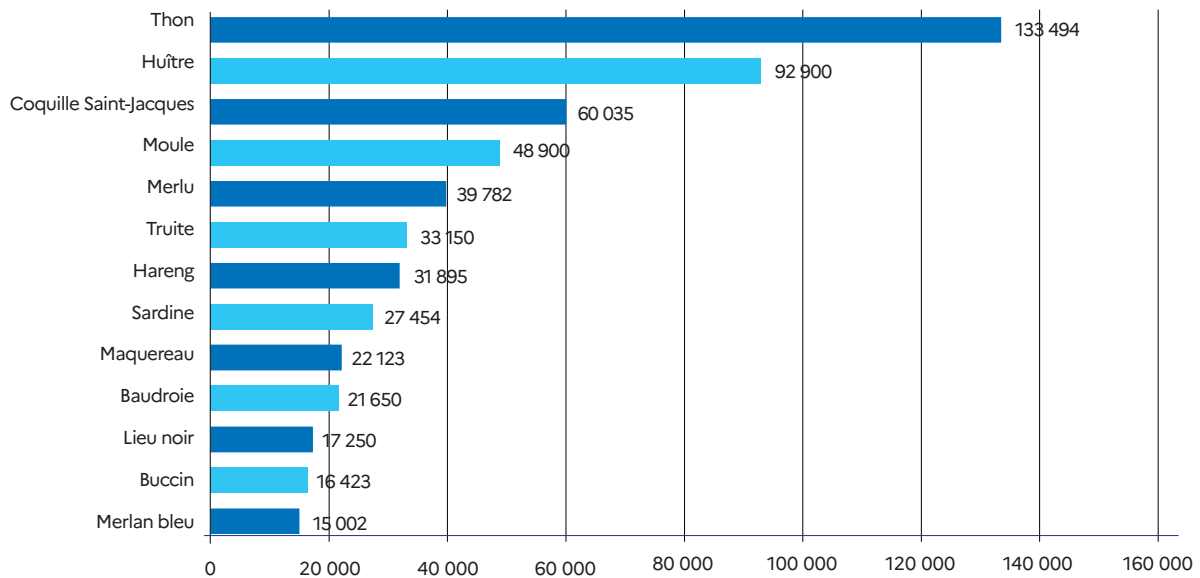
## Changes in quantities sold in metropolitan France <sup>(1)</sup>

(1 000 tons) (3)



## Main species sold in metropolitan France in 2018 <sup>(2)</sup> <sup>(3)</sup>

(in tons) (2)



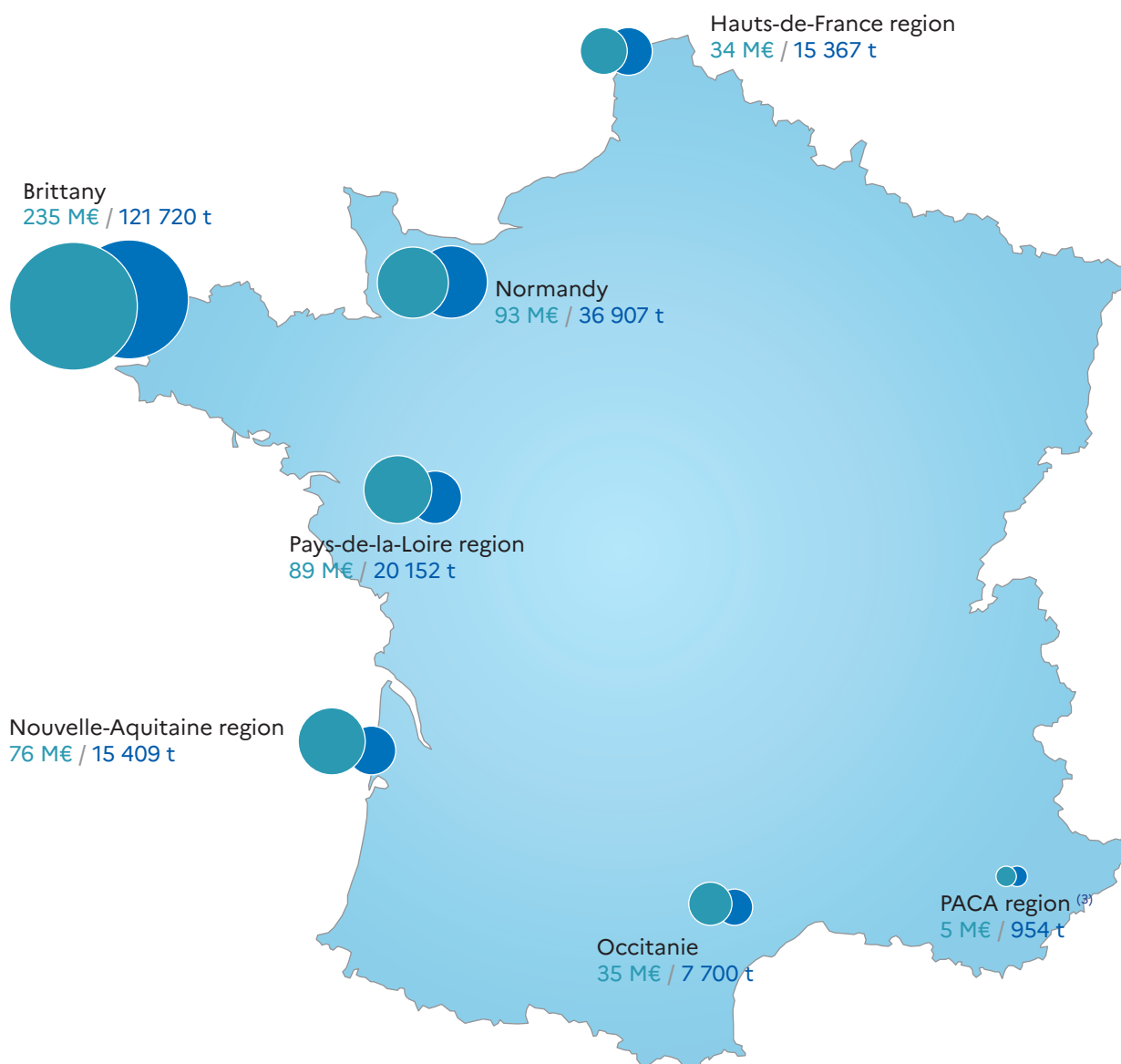
(1) Excluding seaweeds - (2) Equivalent live weight - (3) Total sales to processing industry and export sales - (4) Including farmed crustaceans

Source : MAA /DPMA

# • Sales of fishery products

## Fresh and frozen landings by region in 2020 <sup>(1)</sup>

Sales  
Value (million euros) / Quantity (tons) <sup>(2)</sup>



(1) Excluding seaweeds and freshwater fishing

(2) In net weight

(3) Sales without auction - VISIOMer

Source : VISIOMer/FranceAgriMer

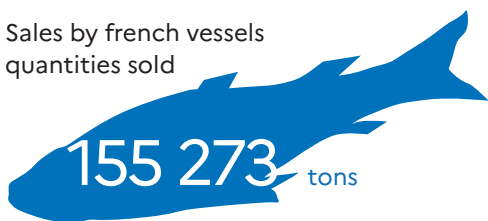
# • Sales of fishery products

## Sales of fishery products at auction in 2020

Number of auctions in 2020 : **37**

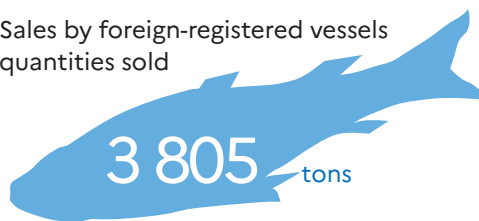


Sales by french vessels  
quantities sold



Value of sales **526** million euros

Sales by foreign-registered vessels  
quantities sold



Value of sales **12** million euros

Source : VISIOMer/ FranceAgriMer

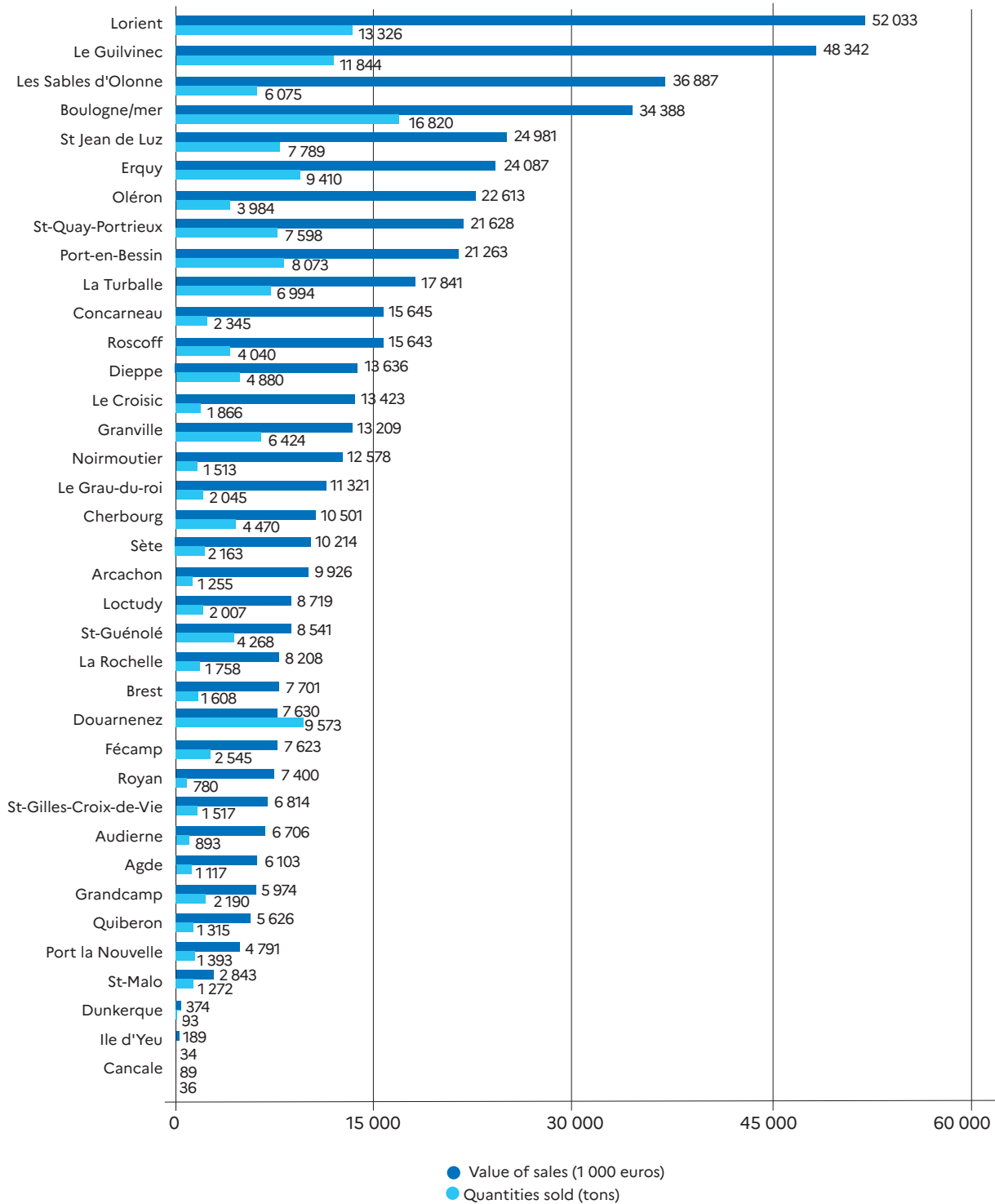


# • Sales of fishery products



**PRODUCTION**

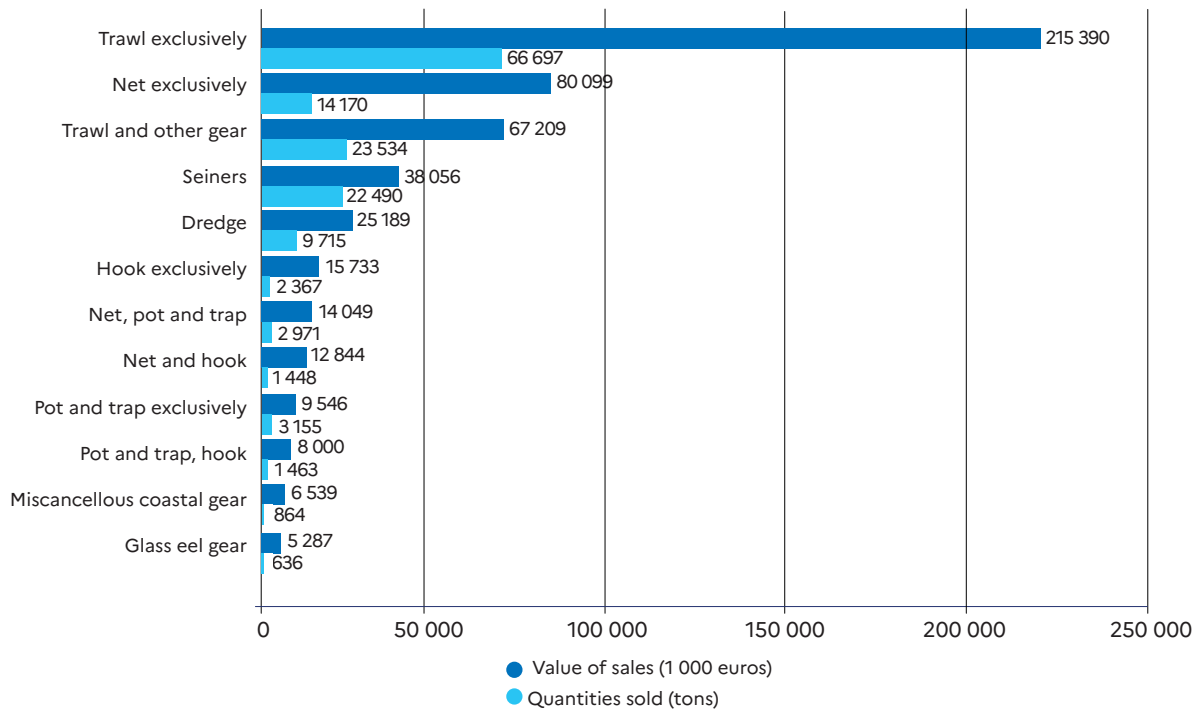
## Quantities sold and value of sales by french vessels at auctions in 2020



Source : VISIOMer / FranceAgriMer

## • Sales of fishery products

### Breakdown of quantities sold and value of sales at auction in 2020 by fleet segment <sup>(1)</sup> <sup>(2)</sup> <sup>(3)</sup>



### Number of vessels (sales at auction in 2020) <sup>(1)</sup> <sup>(2)</sup> <sup>(3)</sup>

Trawl and other gear	627
Trawl exclusively	591
Net exclusively	444
Dredge	365
Net, pot and trap	268
Pot and trap exclusively	235
Hook exclusively	232
Seiners	171
Net and hook	167
Pot and trap, hook	132
Glass eel gear	130
Miscellaneous coastal gear	129
<b>Total</b>	<b>3 491</b>

(1) Breakdown by fleet segment based on main gear used by vessels according to VISIOMer

(2) Unspecified and inactive are not considered

Sources : FranceAgriMer, Ifremer

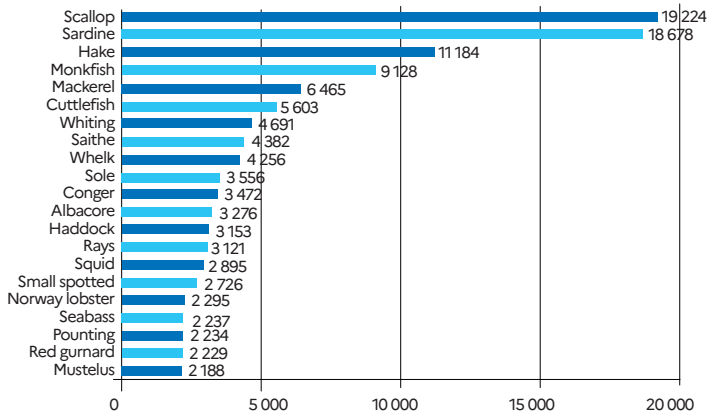
# Sales of fishery products



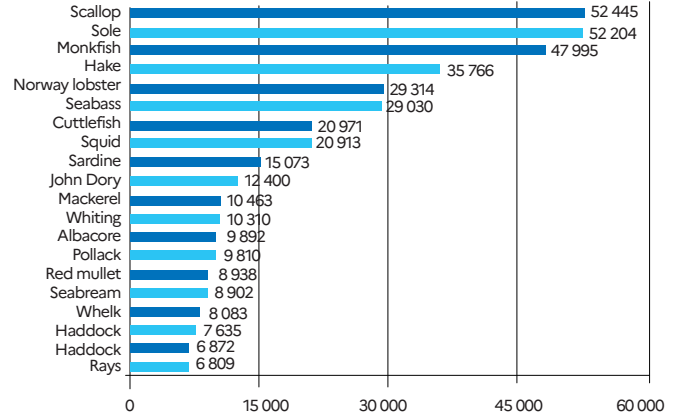
**PRODUCTION**

## Main species sold at auction by french vessels in 2020

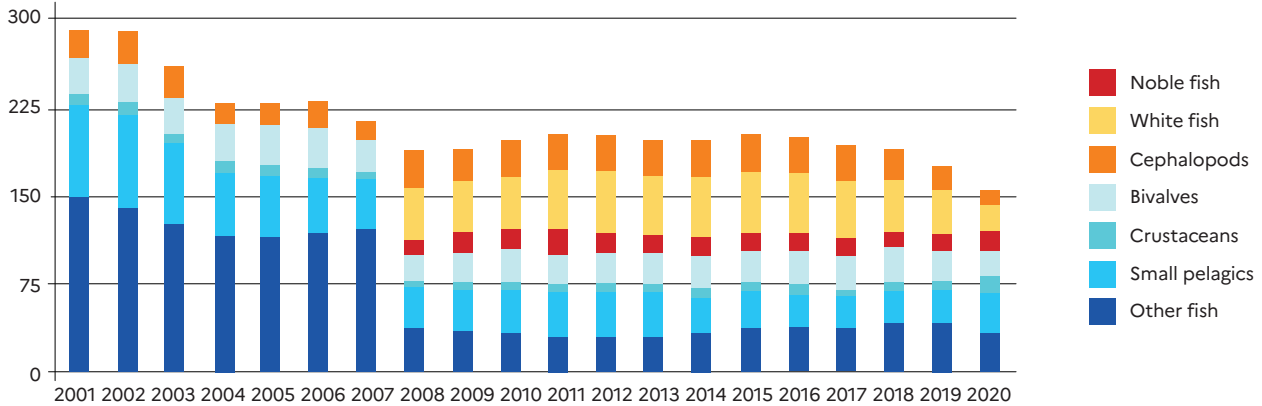
Quantities sold (in tons)



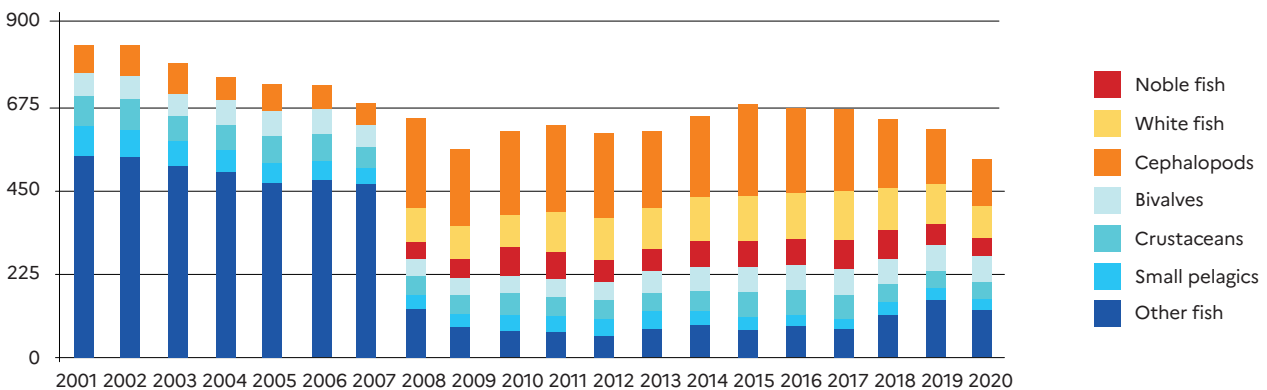
Value of sales (1 000 euros)



Changes in quantities sold by the french vessels by species group (1 000 tons)



Changes in value of sales by the french vessels by species group (million euros)

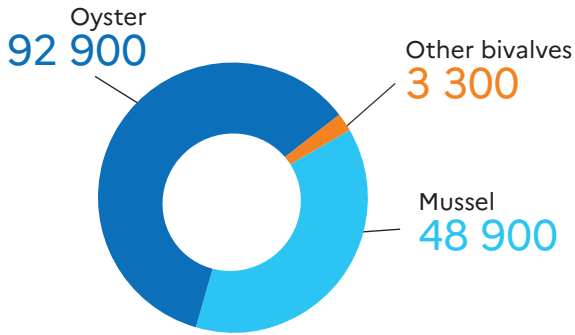


Source : VISIOMer - FranceAgriMer

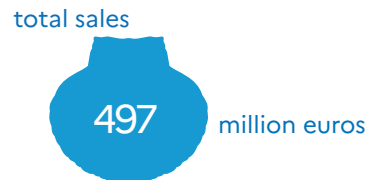
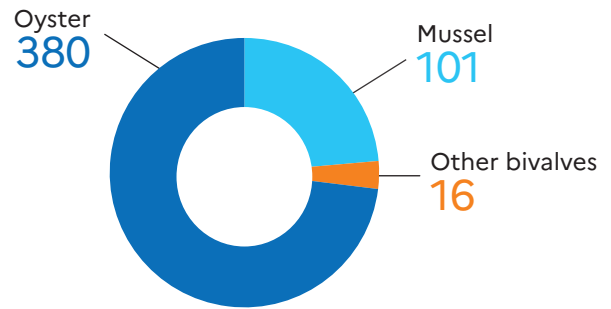
# • Sales of aquaculture products in metropolitan France

## Shellfish farming 2020

Quantities sold for consumption (in tons)<sup>(1)</sup>

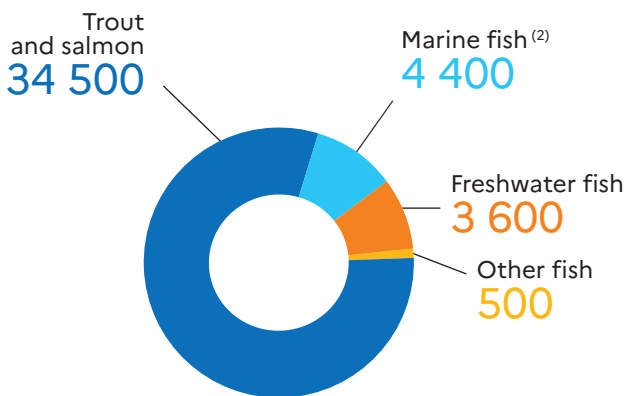


Value of sales (million euros)

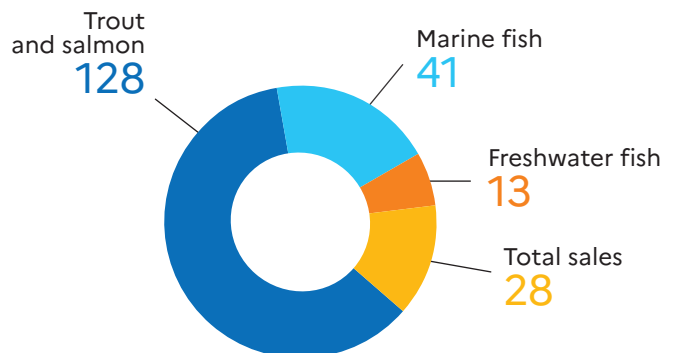


## Fish farming 2020

Quantities sold for consumption (in tons)<sup>(1)</sup>



Value of sales (million euros)



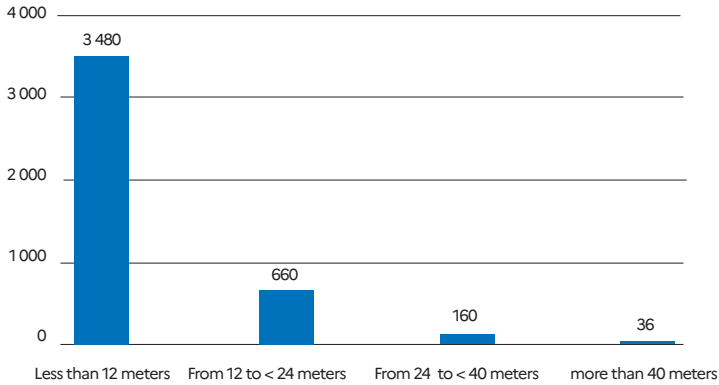
(1) Equivalent live weight

Source : : DPMA Agreste data - Annual survey from SSP 2020

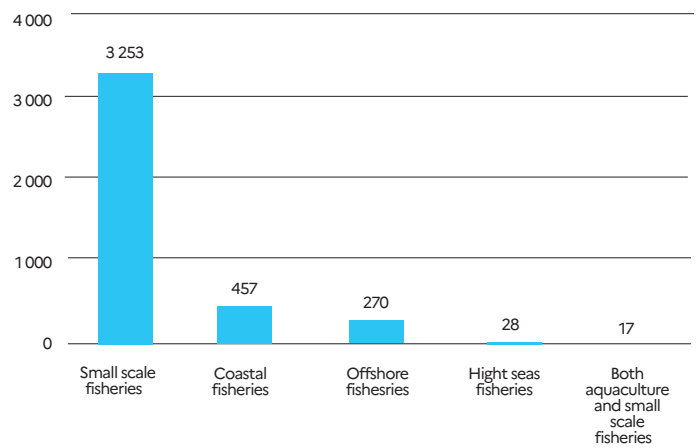
# Fishing fleet

## Fishing fleet

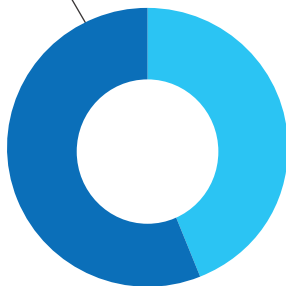
Breakdown of total vessels by length in 2018 (metropolitan France)



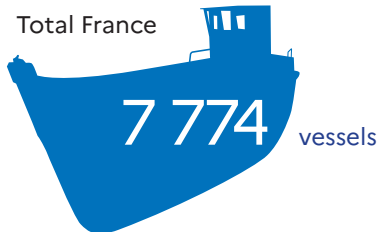
Breakdown of total vessels by fishery category in 2014 (metropolitan France) <sup>(1)</sup>



Metropolitan France  
4 336



Overseas territories  
3 438



### Small scale fisheries

out of port for less than 24 hours

### Coastal fisheries

between 24 hours and 96 hours out of port

### Offshore fisheries

more than 96 hours out of port

### High seas fisheries

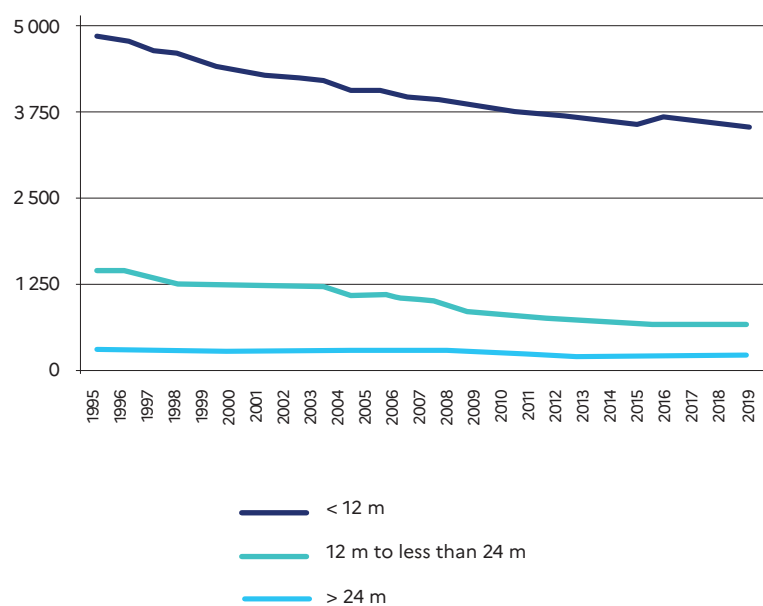
vessels over 1 000 GRT (gross register tonnage) or vessels over 150 GRT if out of port more than 20 days

(1) ships whose navigation type is not informed and are not taken into account. Warning: these data record vessels registered in France, including inactive vessels

Source : FREMER 2018 + study on overseas territories

## • Fishing fleet / Aquaculture firms

Changes in the number of fishing vessels in metropolitan France



	< 12 m	12 m to less than 24 m	> 24 m
1995	4 878	1 434	281
1996	4 795	1 395	285
1997	4 656	1 318	279
1998	4 583	1 258	277
1999	4 461	1 239	271
2000	4 380	1 233	270
2001	4 271	1 201	272
2002	4 256	1 179	275
2003	4 209	1 155	277
2004	4 069	1 068	274
2005	4 034	1 057	269
2006	3 967	1 006	259
2007	3 939	991	257
2008	3 862	876	241
2009	3 815	817	225
2010	3 769	773	209
2011	3 747	721	207
2012	3 645	741	192
2013	3 621	724	192
2014	3 580	704	188
2015	3 665	683	185
2016	3 603	697	186
2017	3 562	670	185
2018	3 512	668	193
2019	3 480	660	196

Source : fleet file from IFREMER 2019

## Aquaculture firms

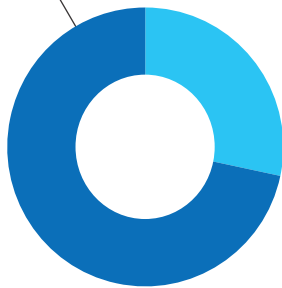
Shellfish farming - including seaweed and shrimps	2 295
Marine fish farming and sturgeon	29
Continental salmonids farming	380

Source : DPMA Agreste data - Annual survey from SSP 2020

## Jobs

Number of seamen employed on board french fishing vessels in 2018 (seamen of all nationalities)

Metropolitan France  
9 687

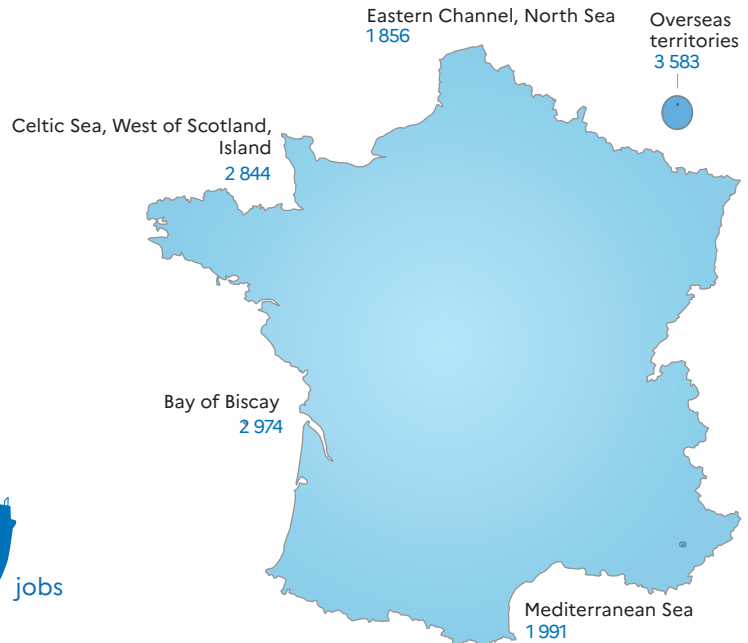


Overseas territories  
3 853

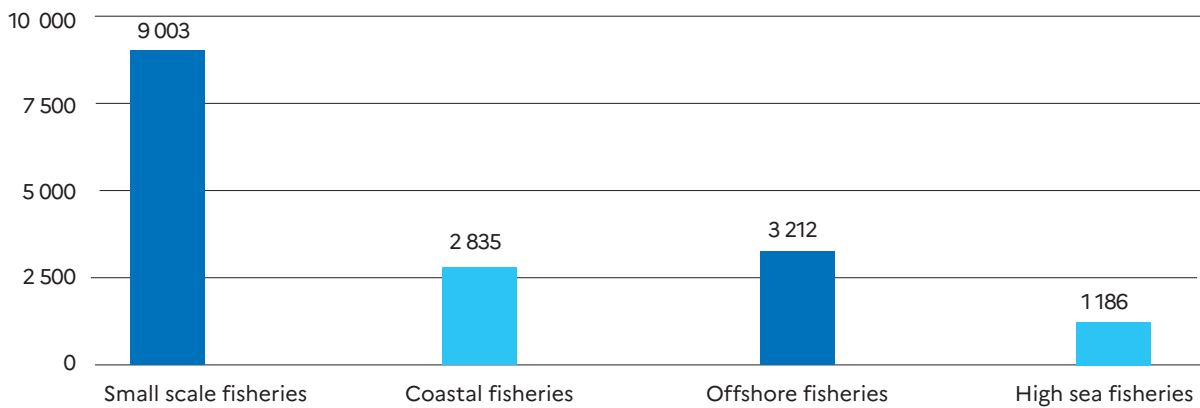
Total France



### Breakdown by fishing area



### Total France



## Number of full time equivalent jobs in 2018

	Jobs	FTEJ
Shellfish farming	16 900	9 000
Fish farming	3 200	2 200

Source : DPMA Agreste data



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# FIRMS

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FISHMONGERS / TRADING / PROCESSING

By sales / By region





# • Fishmonger firms



FIRMS

## Fishmonger's in 2016

Number of establishments



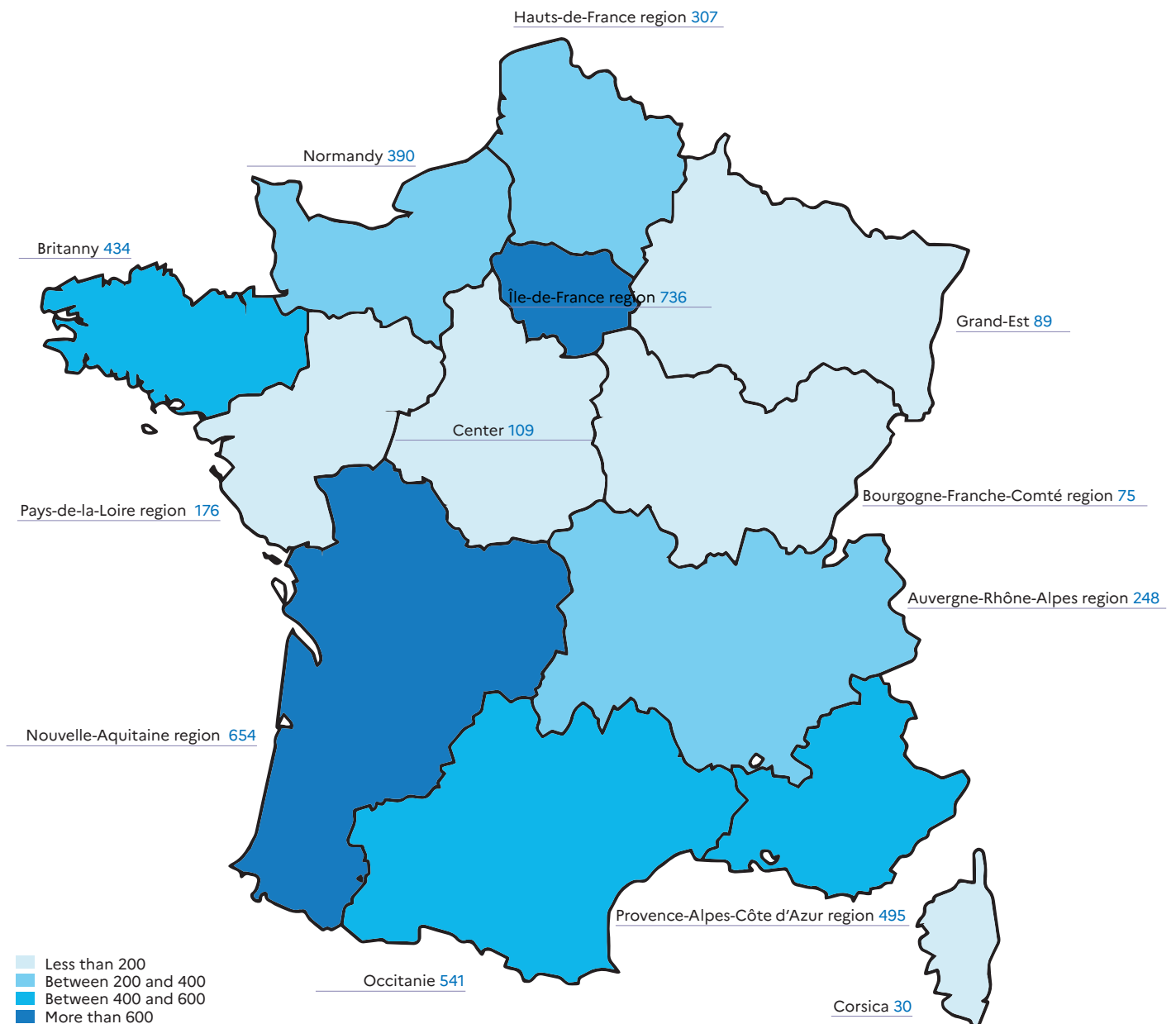
Hand sales



Full time equivalent jobs



Number of establishments per region



Source : ViaAqua and Protéis for FranceAgriMer

# • Trading firms

## Trading firms in 2016

Number of firms



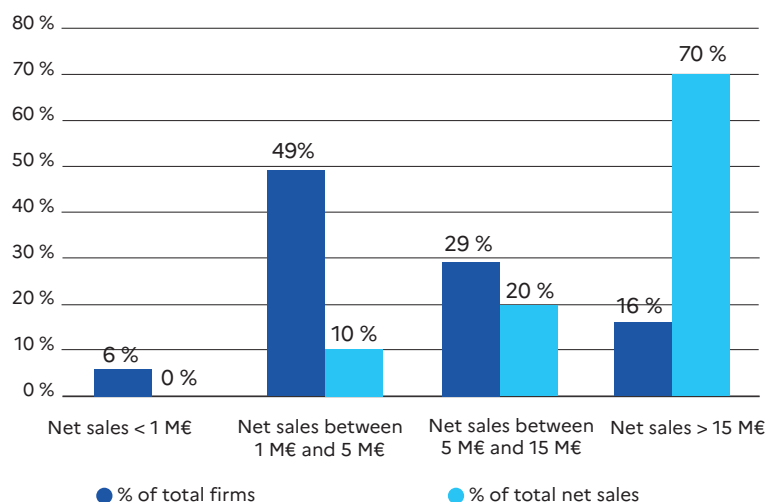
Jobs <sup>(1)</sup>



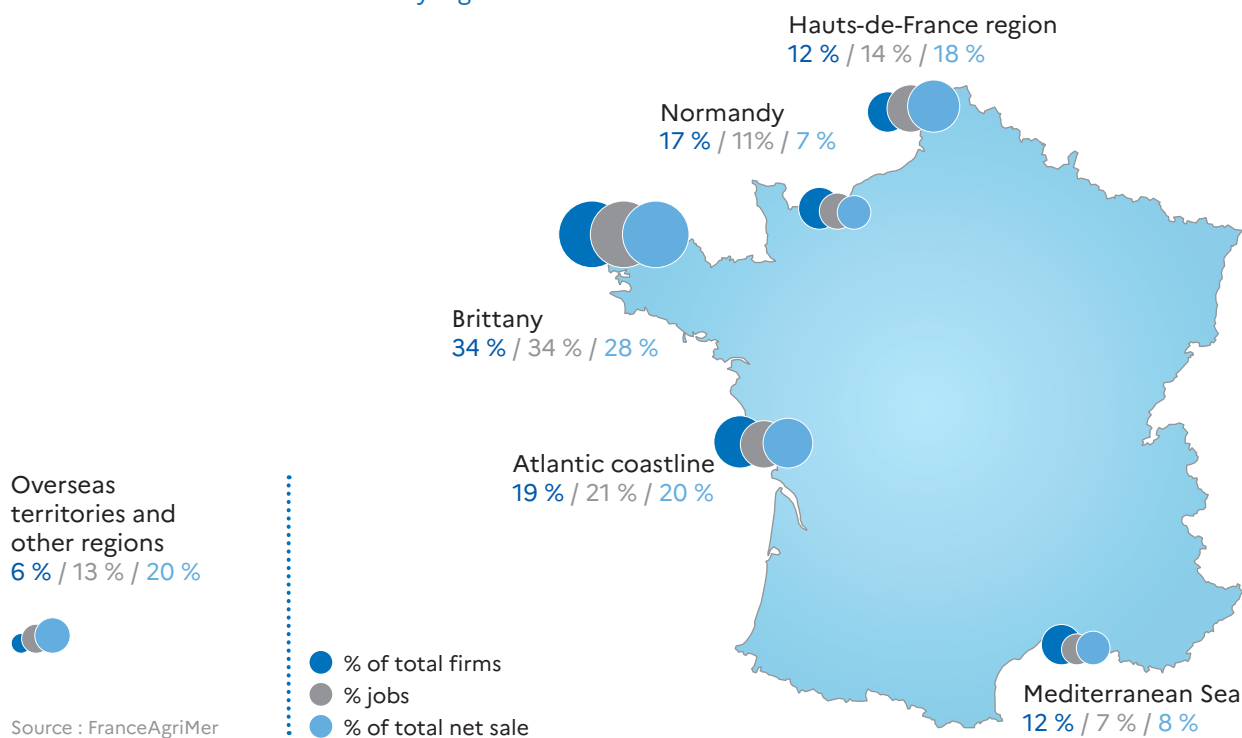
Net sales (million euros) <sup>(1)</sup>



Breakdown of firms by total net sales



Breakdown of firms and total net sales by region



(1) Data 2014 or 2015

# Processing main activity firms



FIRMS

## Processing main activity firms in 2018

Number of firms



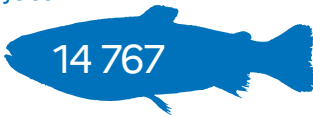
Net sales per firm (million euros) <sup>(1)</sup>



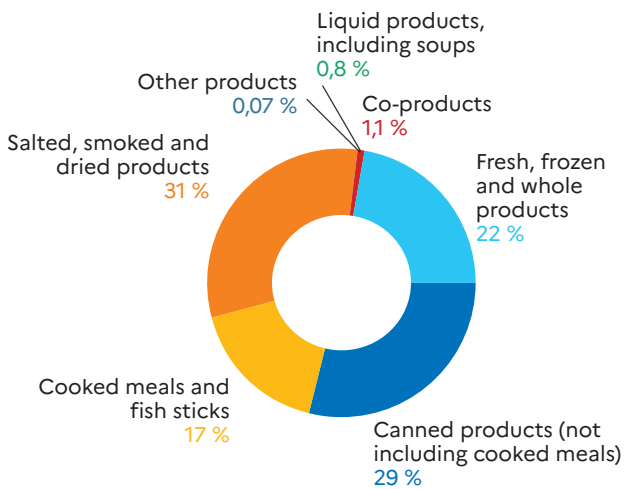
including seafood and fish farming processing



Jobs

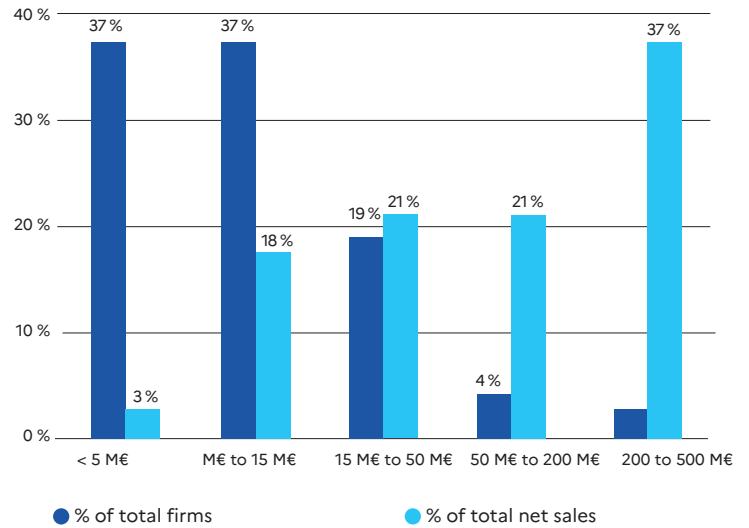


Seafood processing net sales <sup>(3)</sup>

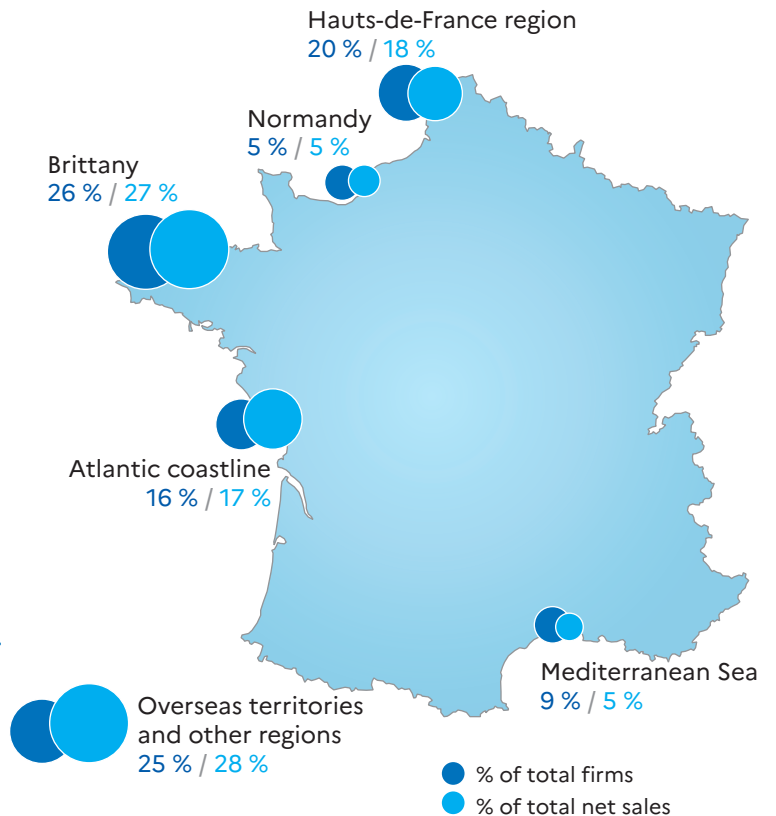


(1) Filleting, cutting, peeling, packaging, surgelation  
 (2) Seaweeds, in fish products, others  
 (3) Small sample estimation

Breakdown of firms by total net sales <sup>(3)</sup>



Breakdown of processing firms and sales by region



Source : FranceAgriMer



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# TRADE

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## IMPORTS / EXPORTS

By presentation / By species / By geographical origine / Main species



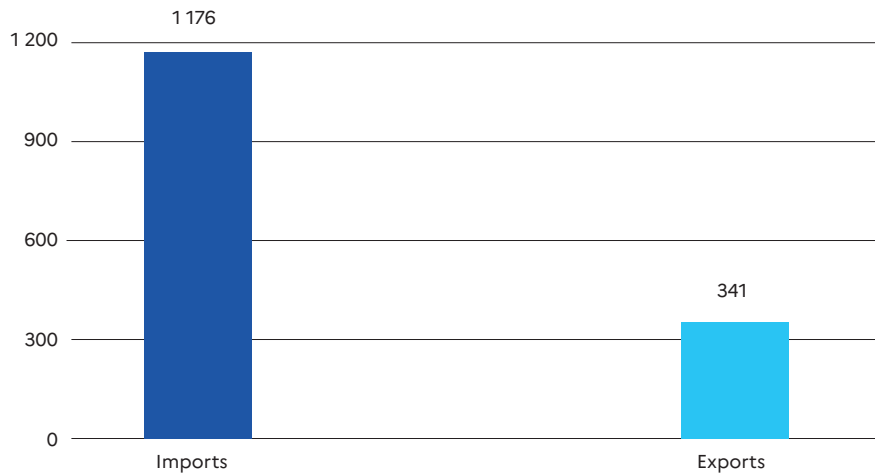
# • Supply balance



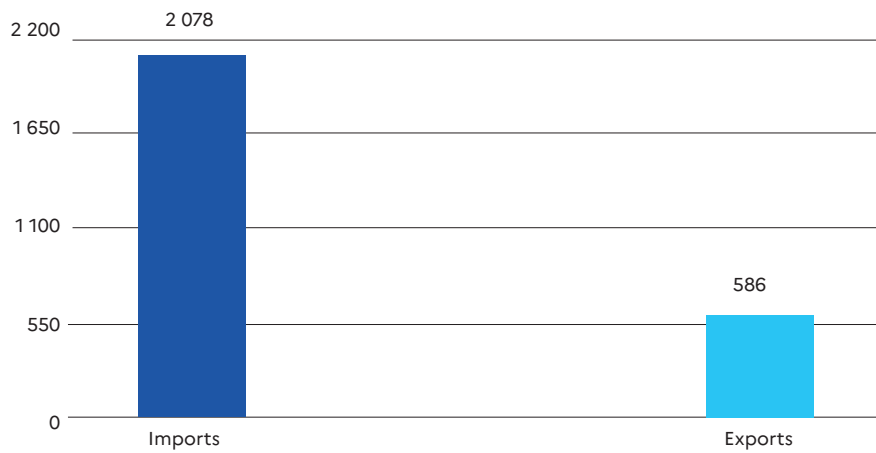
TRADE

## Supply balance in 2020

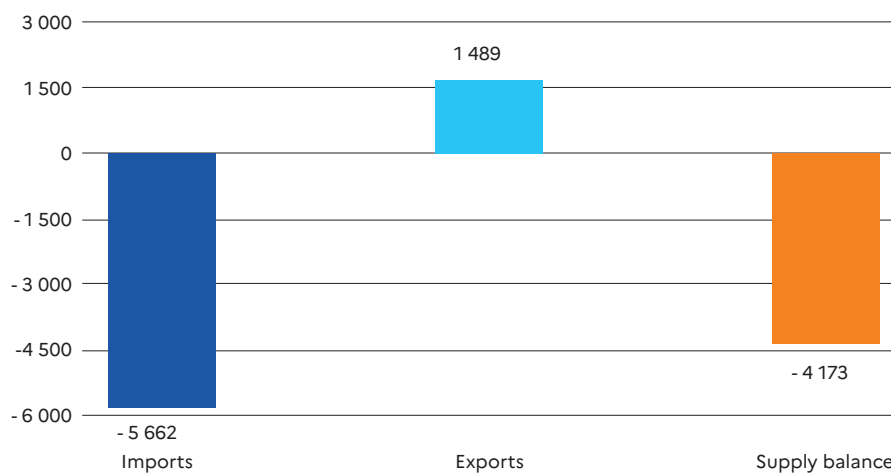
Net weight (1 000 tons)



Live weight (1 000 tons)



Value (million euros)

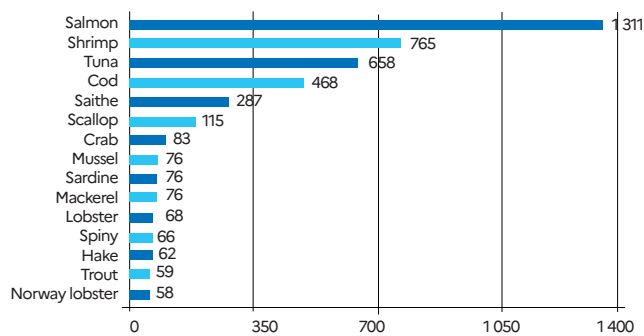


Source : French customs

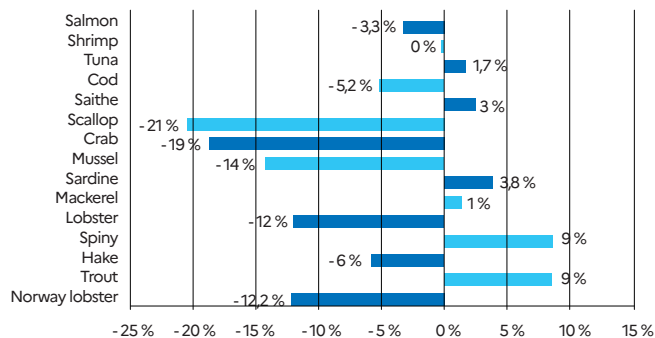
# Imports and exports / metropolitan France and overseas territories

## Imports - main species in 2020

Value (million euros)

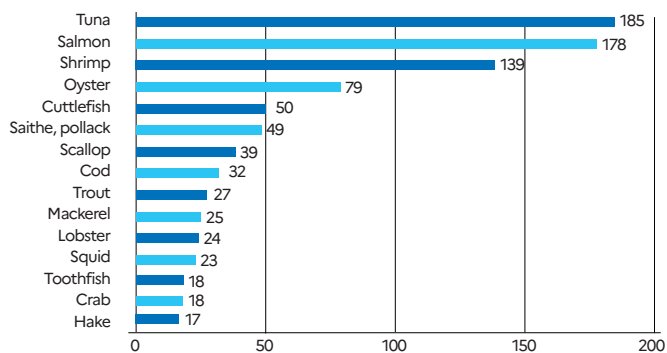


Evolution 2020/19 (en %)

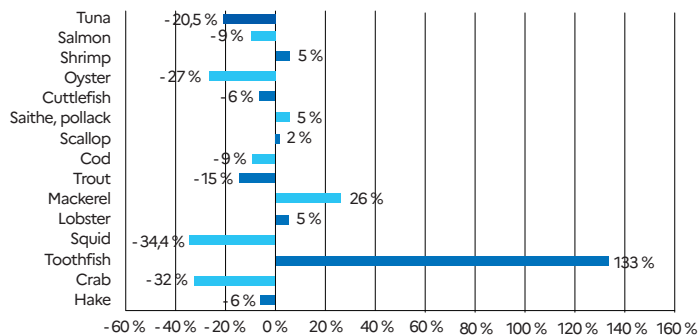


## Exports - main species in 2020

Value (million euros)



Evolution 2020/19 (en %)



Source : French customs

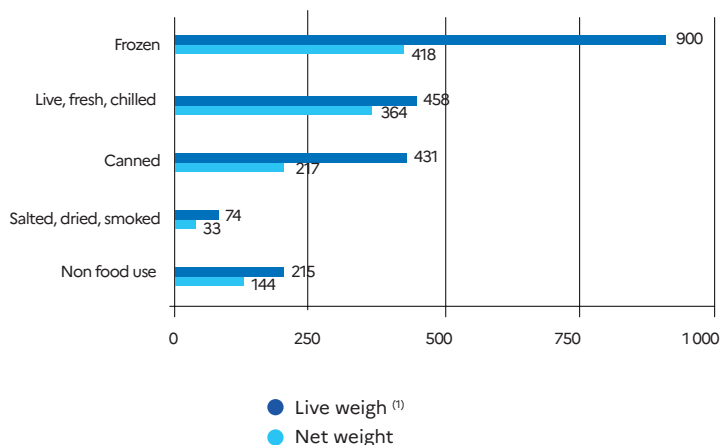
# Imports and exports / metropolitan France and overseas territories



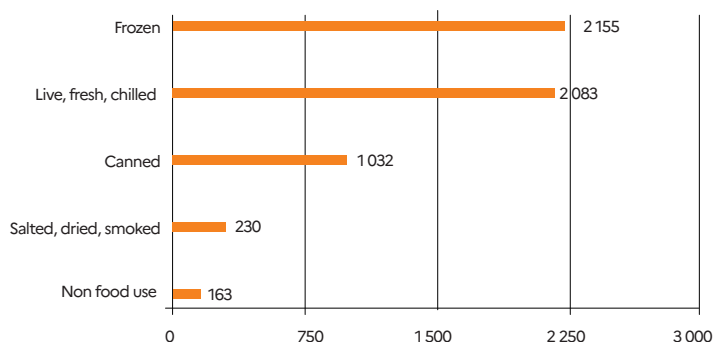
TRADE

## Imports by presentation in 2020

Imports by volume (1 000 tons)

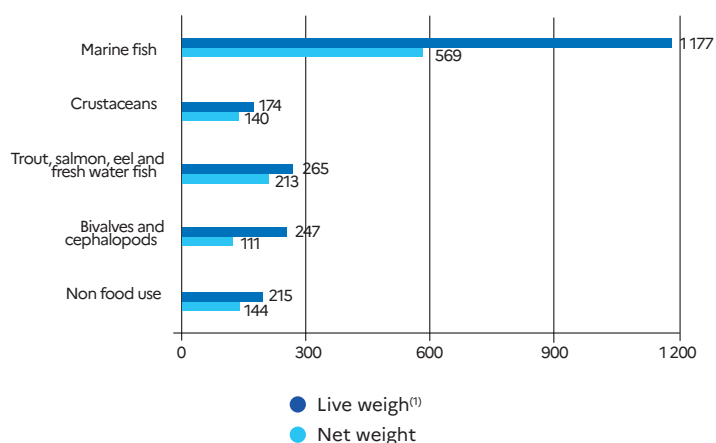


Imports by value (millions euros)

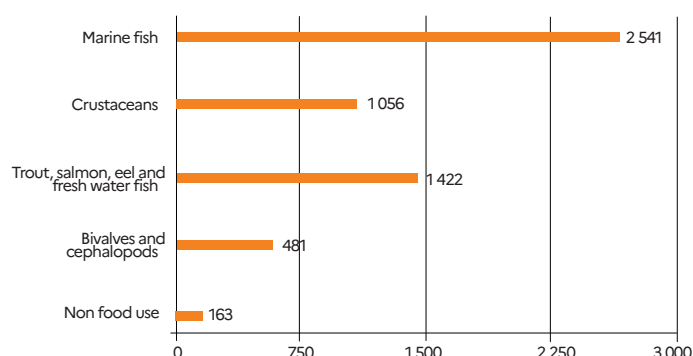


## Imports by species group in 2020

Imports by volume (1 000 tons)



Imports by value (millions euros)



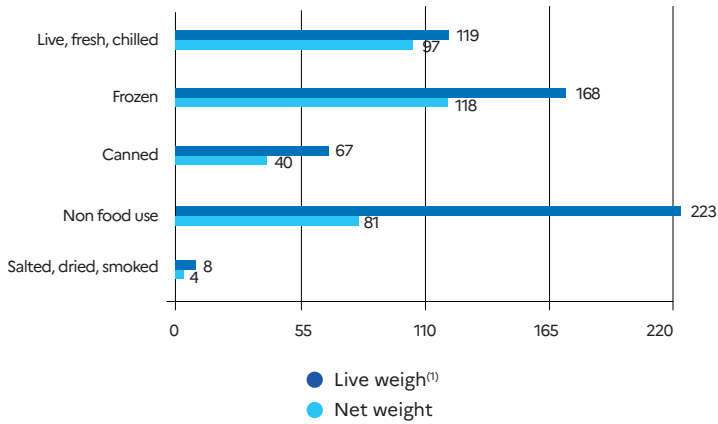
(1) Data collection methodology is detailed on inside back cover

Source : French customs

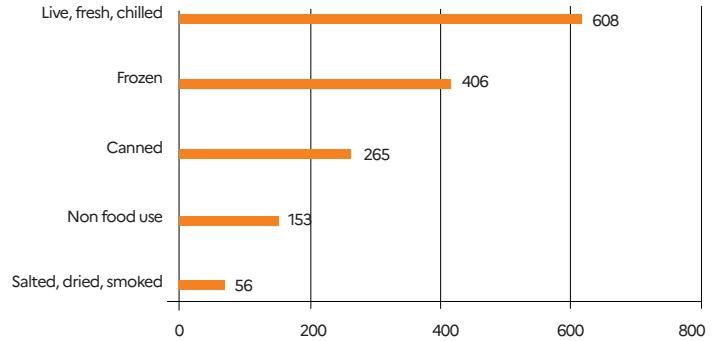
# Imports and exports / metropolitan France and overseas territories

## Exports by presentation in 2020

Exports by volume (1 000 tons)

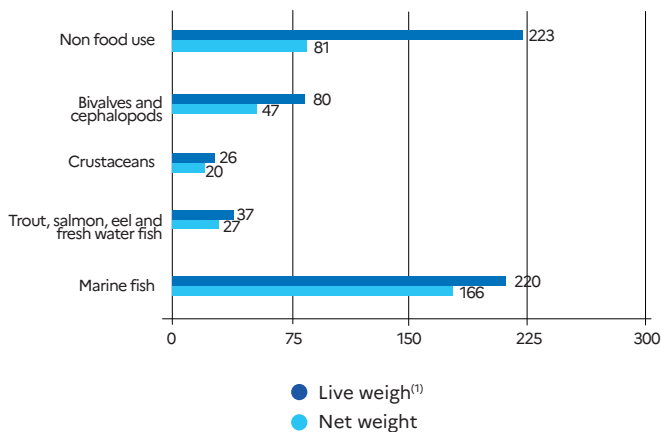


Exports by value (millions euros)

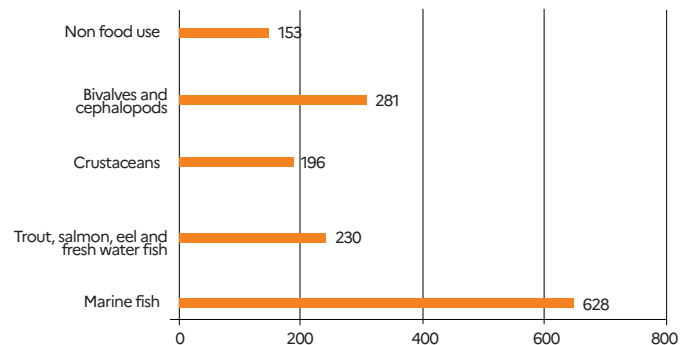


## Exports by species group in 2020

Exports by volume (1 000 tons)



Exports by value (millions euros)



(1) Data collection methodology is detailed on inside back cover

Source : French customs



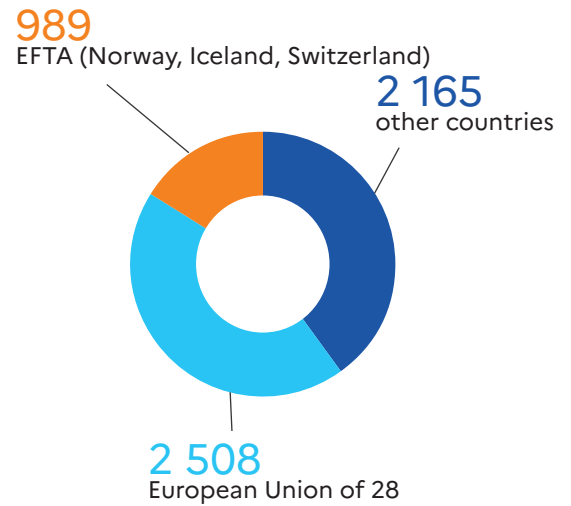
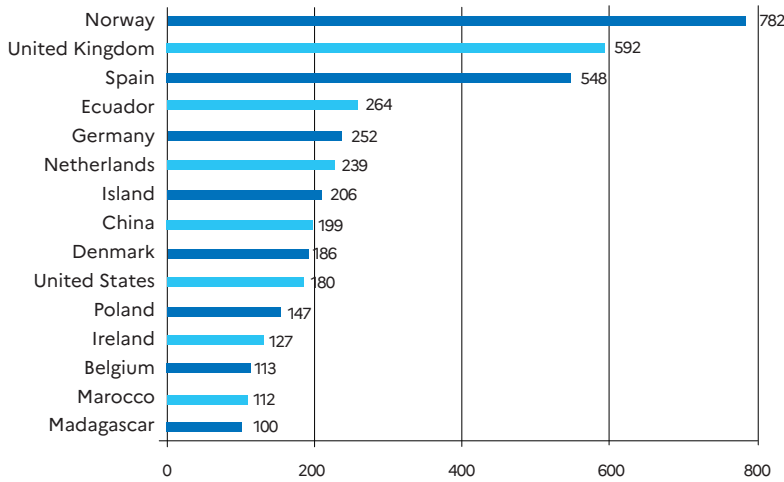
# Imports and exports / metropolitan France and overseas territories



TRADE

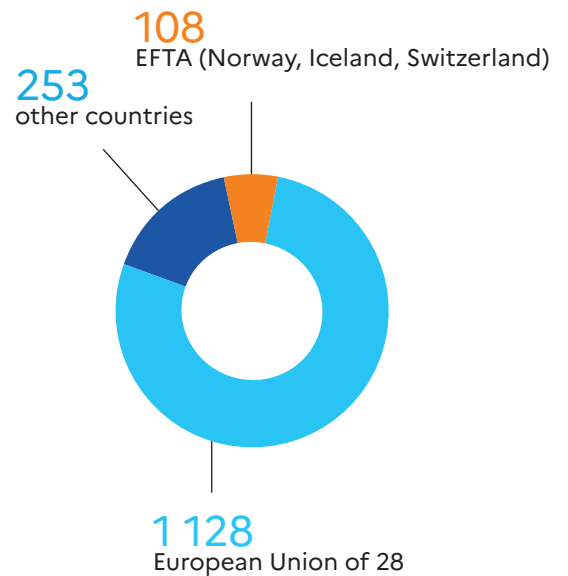
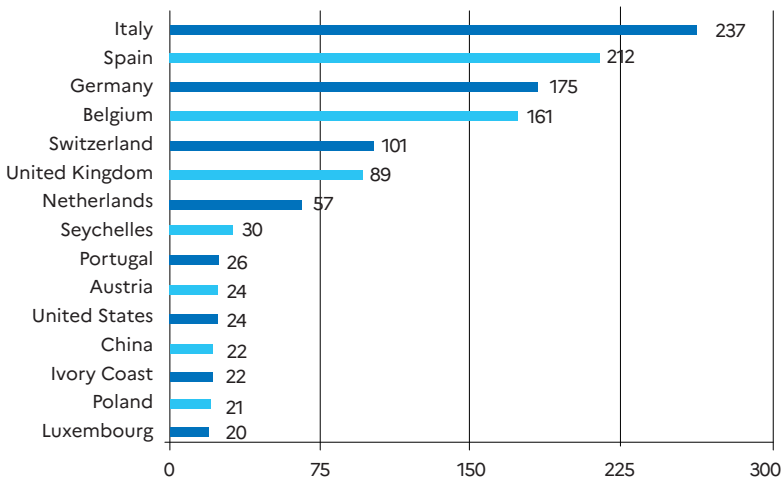
## Imports of aquatic products by geographical origin in 2020

Value (millions euros)



## Exports of aquatic products by destination in 2020

Value (millions euros)



Source : French customs



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# CONSUMPTION

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## SUPPLY BALANCE / PURCHASES

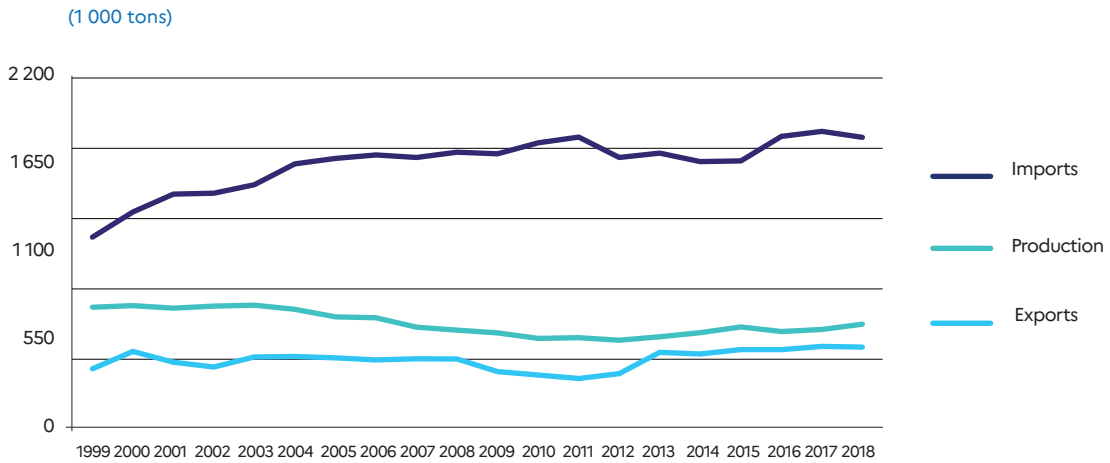
Households / Catering / Breakdown of purchases by distribution channel



# • Supply balance

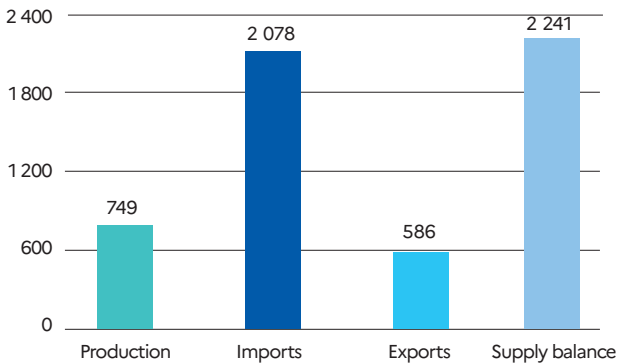


Balance changes in production, imports, and exports (1) (2)

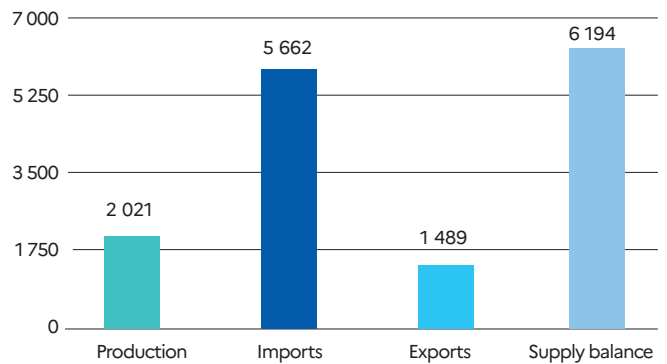


## Supply balance in 2018

In volume (1 000 tons)



In value (millions euros)

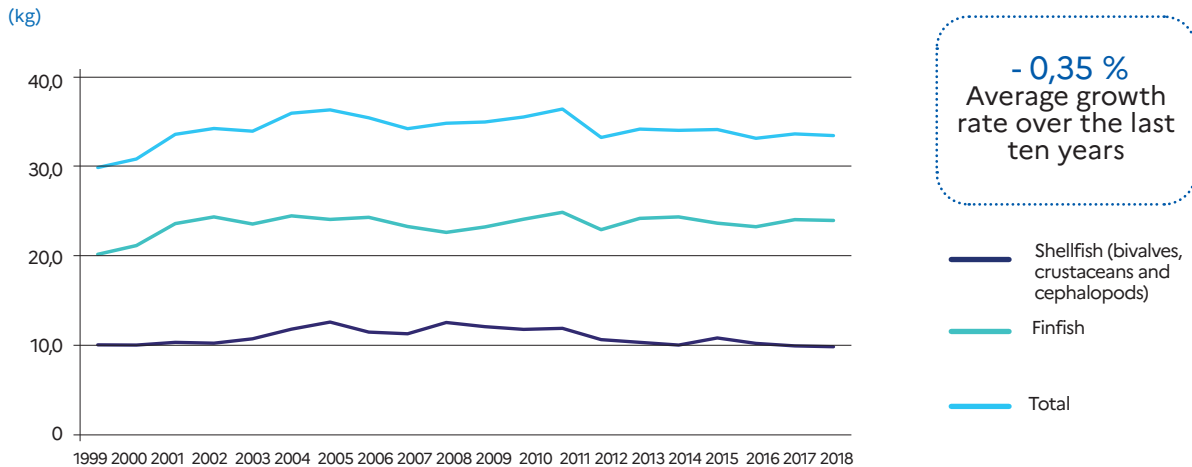


(1) Data collection methodology is detailed on inside back cover - (2) Live weight

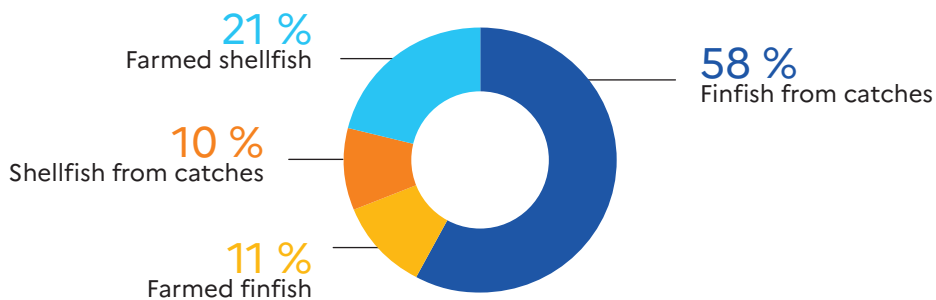
Source: FranceAgriMer

# • Supply balance

## Changes in supply balance <sup>(1) (2)</sup>

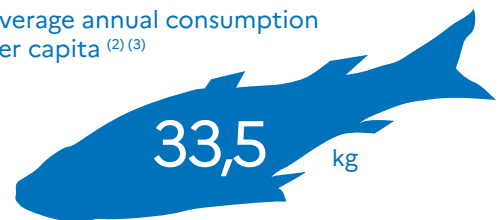


## Breakdown by products in 2015 <sup>(1) (2)</sup>



Average annual consumption per capita <sup>(2) (3)</sup> (kg)	33,5
<b>Fish farming</b>	3,8
Salmon	2,7
<b>Farmed shellfish and finfish</b>	
Mussel	2,4
Oyster	1,1
Shrimp	1,9
<b>Finfish and shellfish from catches</b>	
Scallop	1,2
<b>Fish from catches</b>	20,1
Tuna	3,9
Cod	2,8
Alaska pollock	2,3
Sardine	1,0
Hake	1,2
Herring	0,7
Mackerel	0,9
Saithe	0,7
Monkfish	0,4

Average annual consumption per capita <sup>(2) (3)</sup>



(1) Data collection methodology is detailed on inside back cover - (2) Equivalent live weight - (3) Estimation for 2017

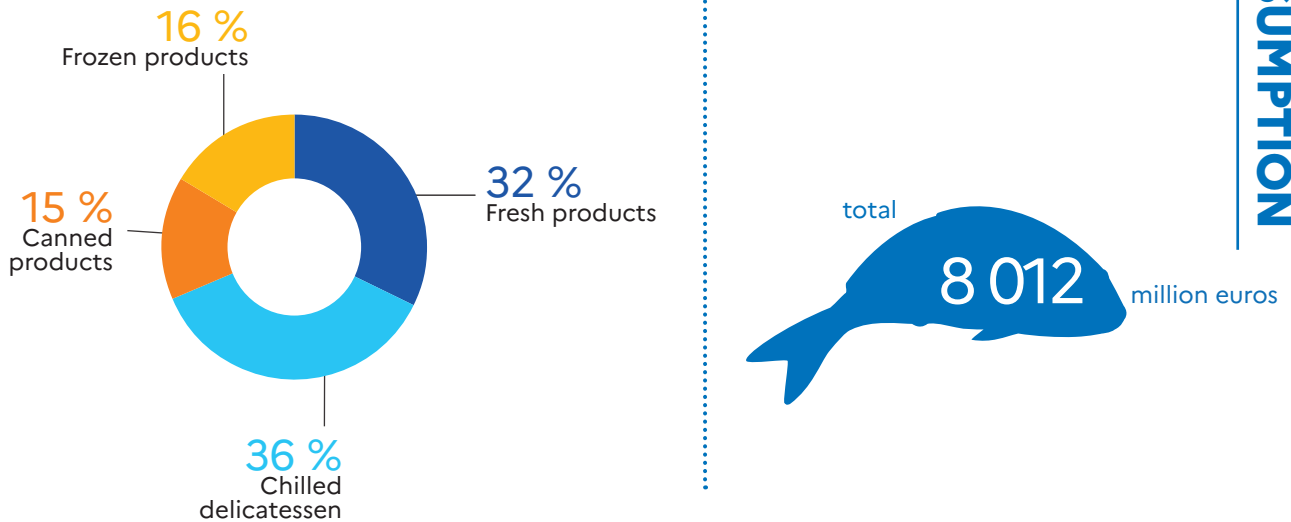
Source : FranceAgriMer, Kantar Worldpanel, Eumofa

# Households purchases

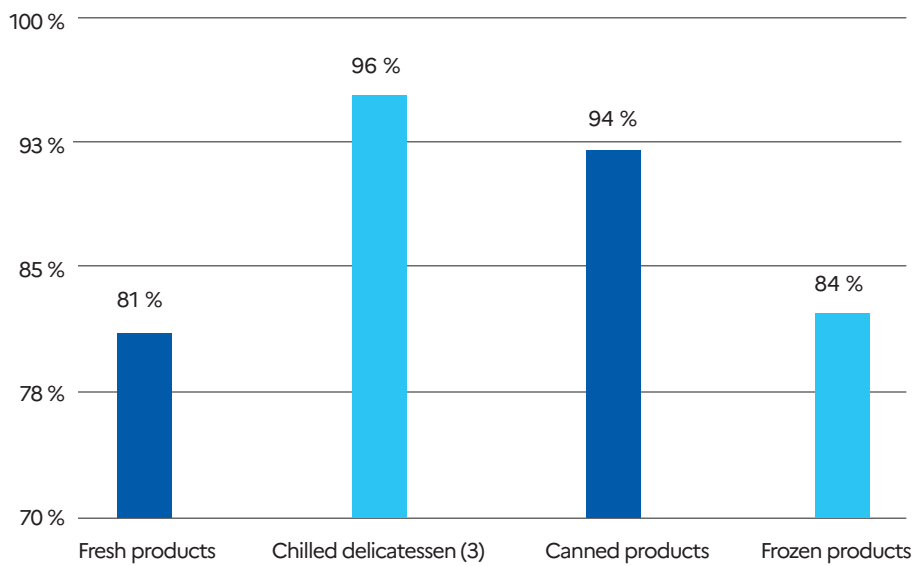


CONSUMPTION

## Households spending for aquatic products in 2020 <sup>(1)</sup>



## Percentage of purchasing households in 2020 <sup>(2)</sup>



## Households consumption over 10 years

	2011		2020		Evolution	
	Volumes (in thousands of tons)	Spendings (in thousands of €)	Volumes (in thousands of tons)	Spendings (in thousands of €)	Volumes	Values
Fresh products	232 553	2 313 814	209 965	2 517 273	-10 %	9 %
Frozen products	151 967	1 479 703	127 235	1 390 249	-16 %	-6 %
Canned products	128 400	999 938	128 885	1 228 291	0 %	23 %
Chilled delicatessen	183 457	2 170 580	204 316	2 875 843	11 %	32 %

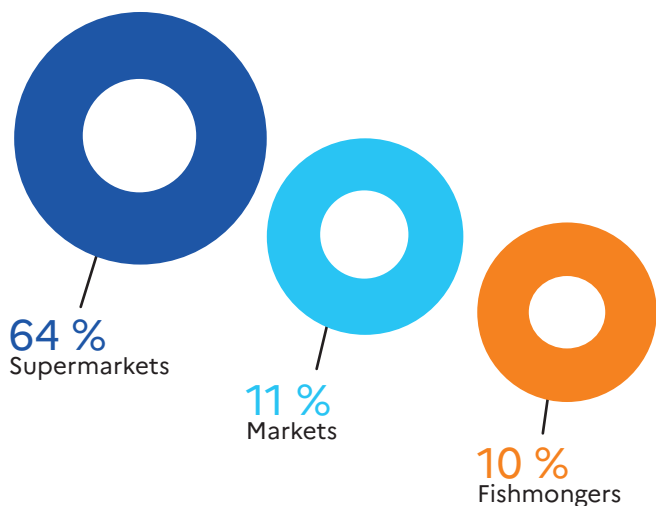
(1) Data collection methodology is detailed on inside back cover - (2) A purchasing households buys the product at least once a year - (3) With bar code

Source : FranceAgriMer from Kantar Worldpanel

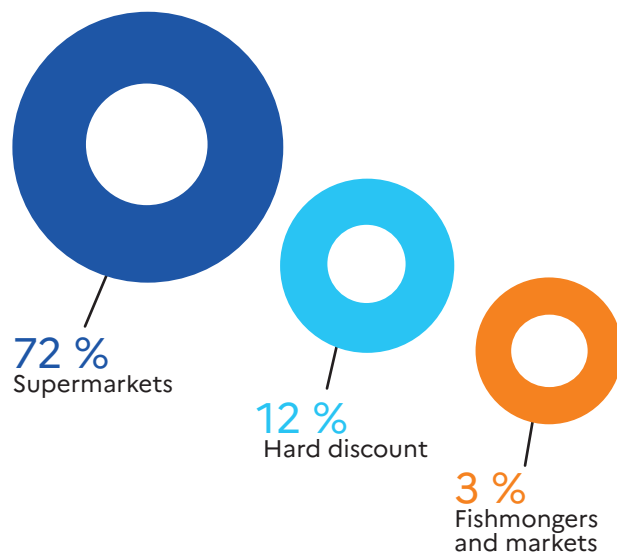
## • Households purchases

### Purchases of aquatic products by french households for home consumption in 2020 <sup>(1)</sup>

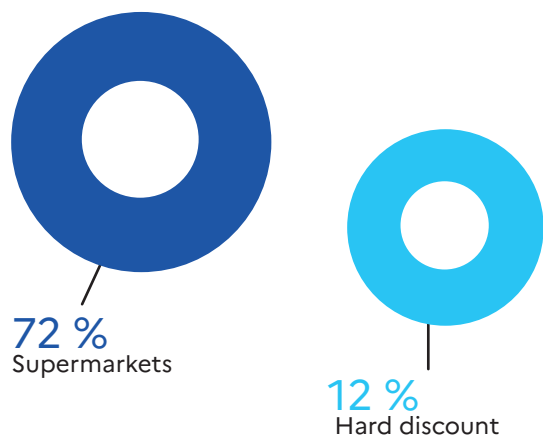
#### Fresh products



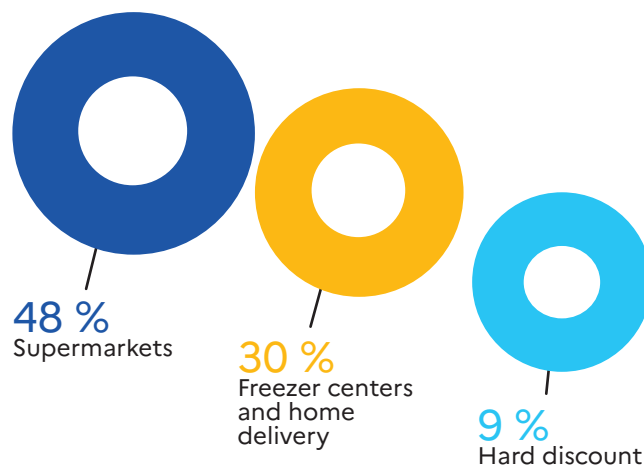
#### Chilled delicatessen



#### Canned products



#### Frozen products



(1) Data collection methodology is detailed on inside back cover

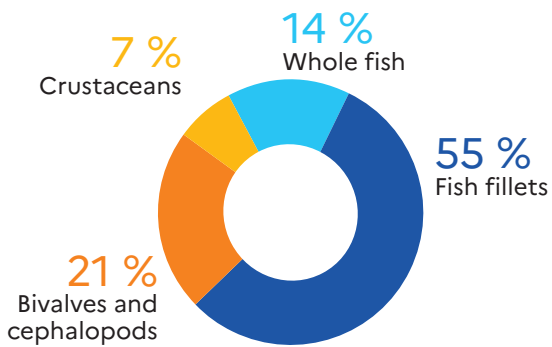
Source : FranceAgriMer from Kantar Worldpanel

# Households purchases

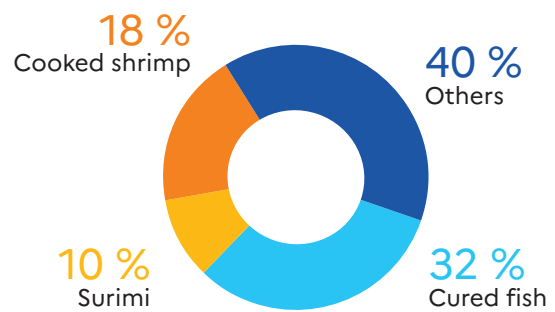


## Breakdown of expenditures by presentation and species group in 2020 <sup>(1)</sup>

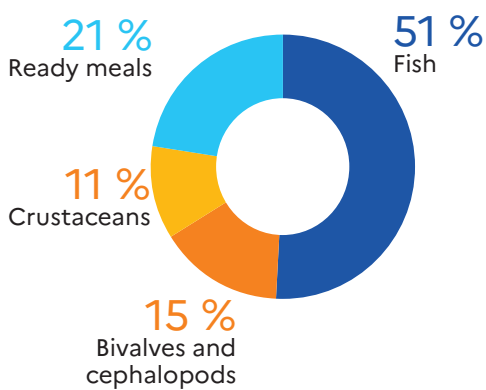
Fresh products



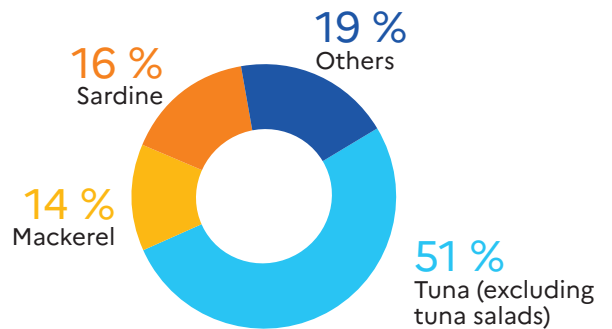
Chilled delicatessen



Frozen products



Canned products



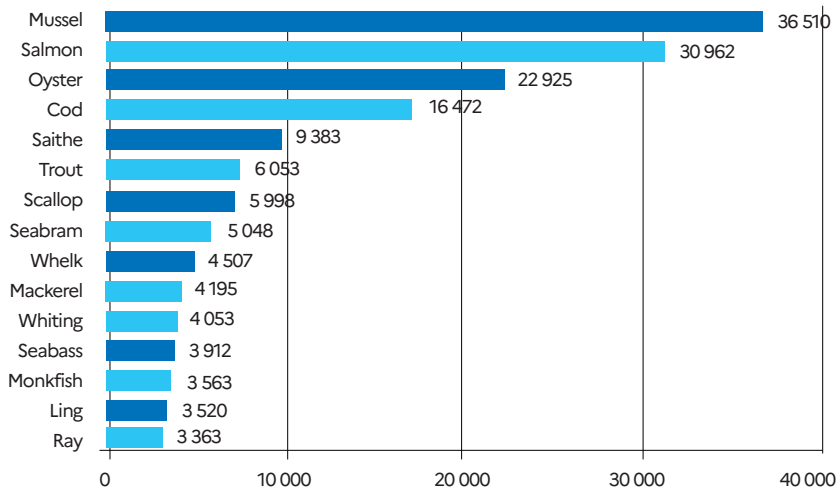
(1) Data collection methodology is detailed on inside back cover

Source : FranceAgriMer from Kantar Worldpanel

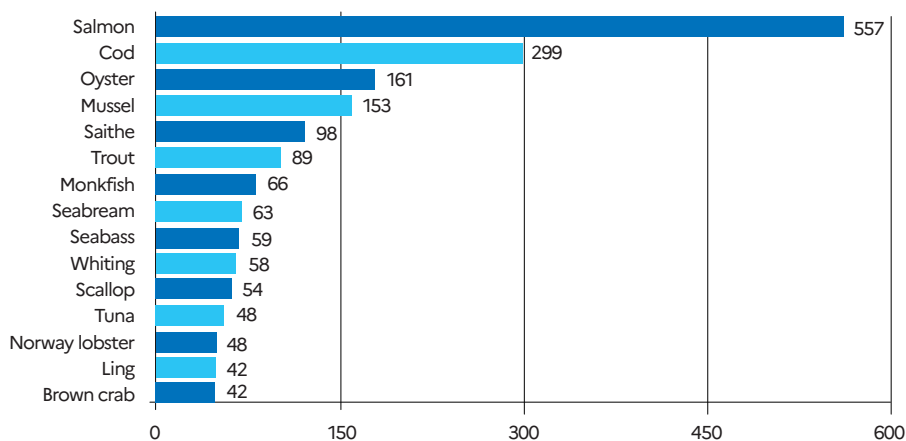
# Households purchases

## Main species purchased fresh in 2020 <sup>(1)</sup>

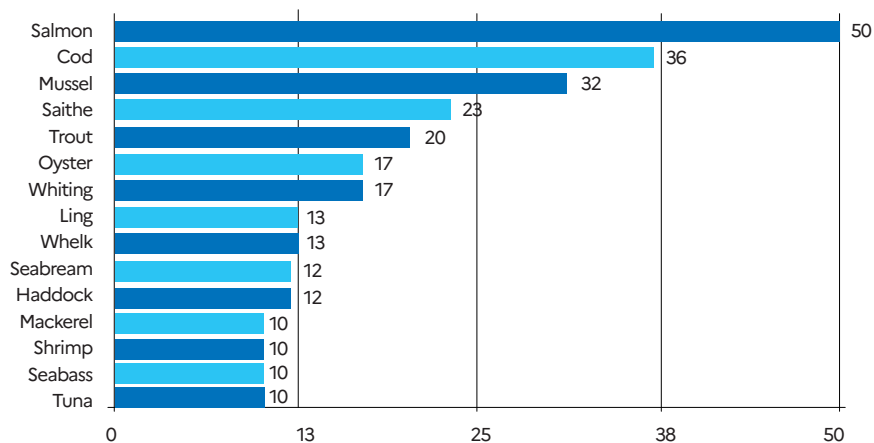
Tons <sup>(2)</sup>



Million euros



Percentage of purchasing households (%)



(1) Data collection methodology is detailed on inside back cover - (2) Net weight

Source : FranceAgriMer from Kantar Worldpanel

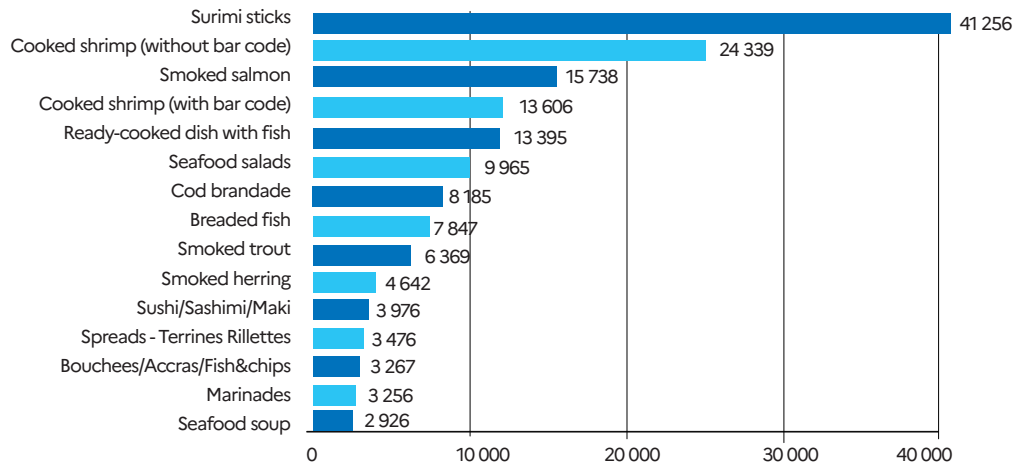


# Households purchases

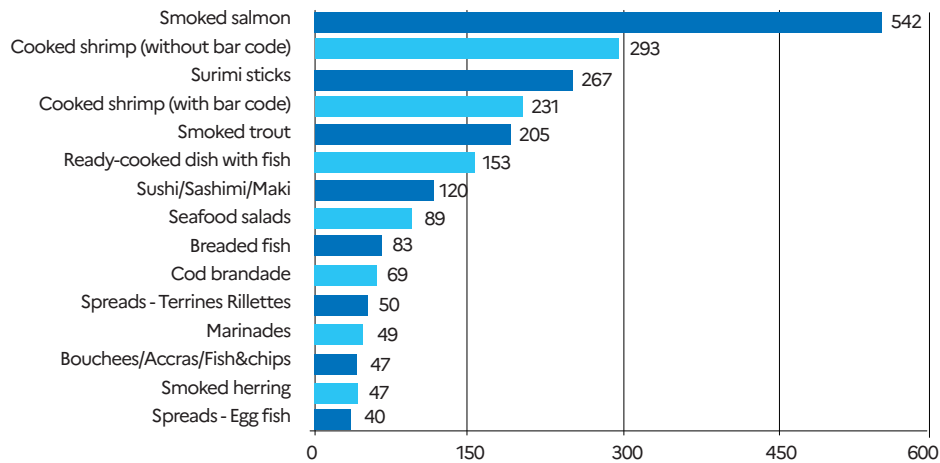


## Main products purchased for chilled delicatessen in 2020 <sup>(1)</sup>

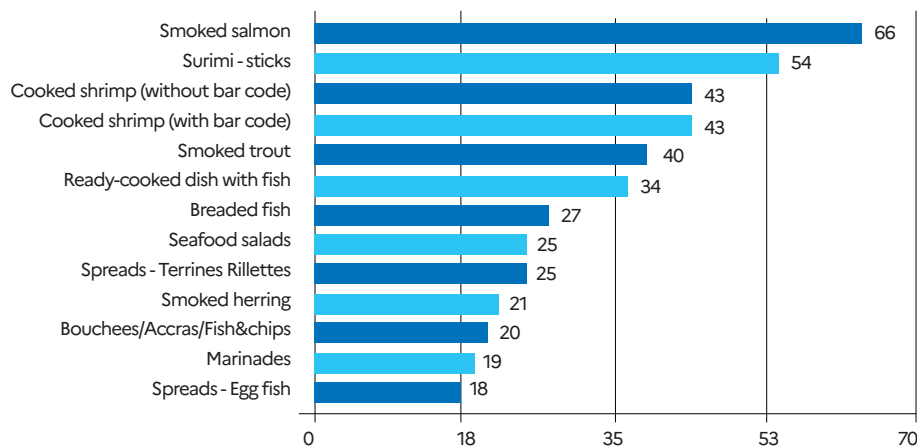
Tons <sup>(2)</sup>



Million euros



Percentage of purchasing households (%)



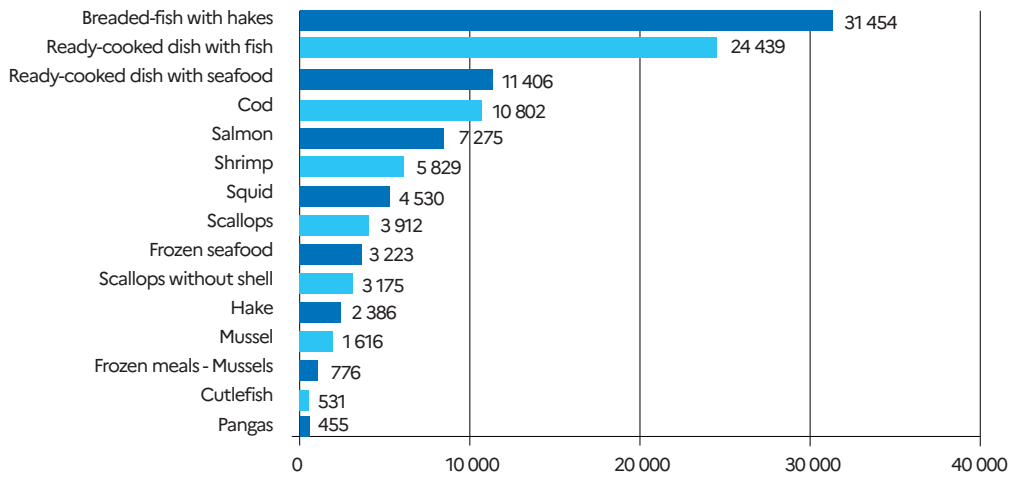
(1) Data collection methodology is detailed on inside back cover - (2) Net weight

Source : FranceAgriMer from Kantar Worldpanel

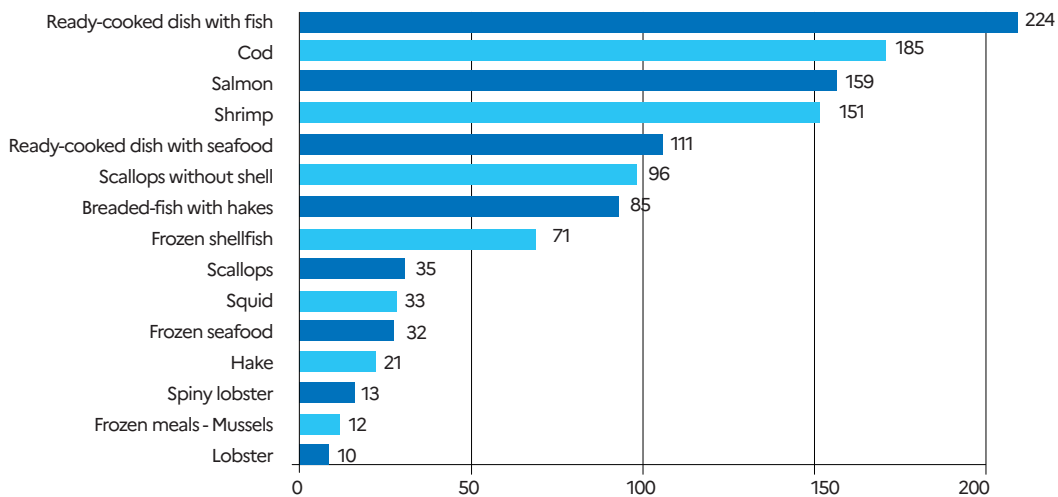
# Households purchases

## Main species purchased as frozen products in 2020 <sup>(1)</sup>

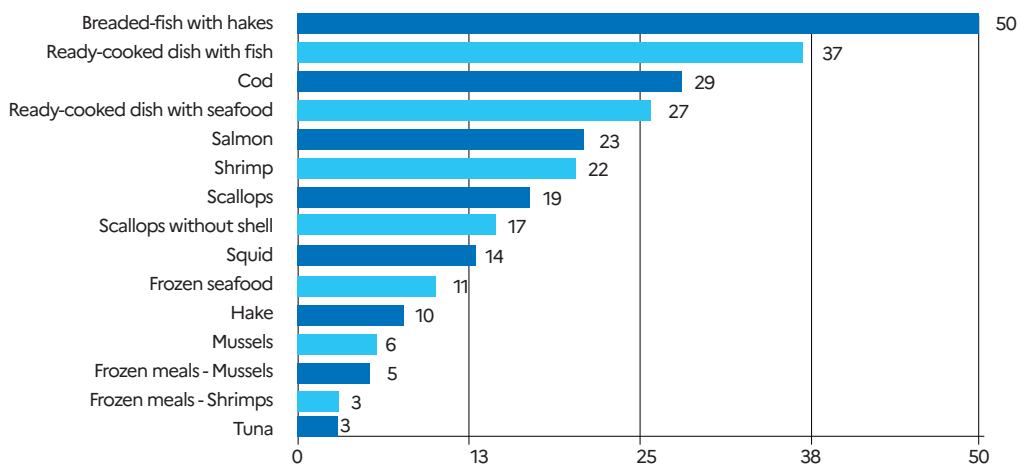
Tons <sup>(2)</sup>



Million euros



Percentage of purchasing households (%)



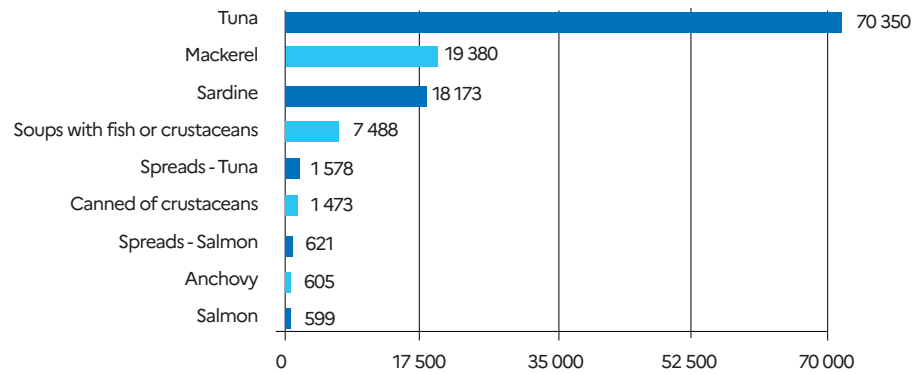
(1) Data collection methodology is detailed on inside back cover - (2) Net weight

# Households purchases

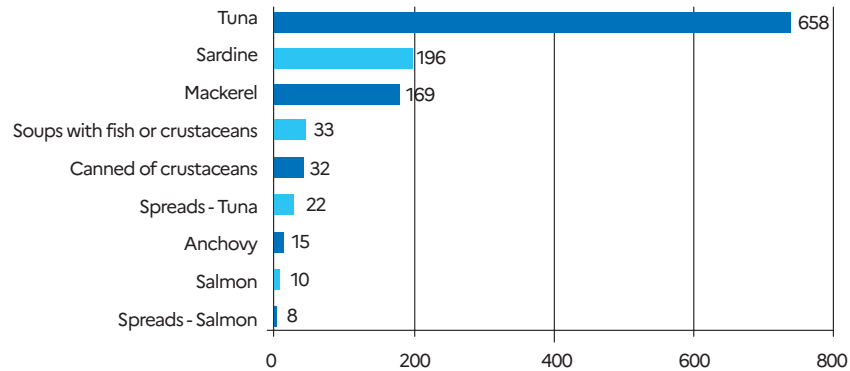


## Main species purchased in canned products in 2020 <sup>(1)</sup>

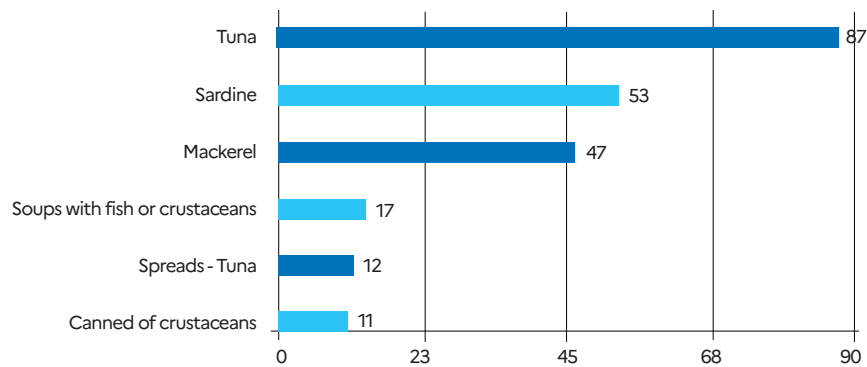
Tons <sup>(2)</sup>



Million euros



Percentage of purchasing households (%)

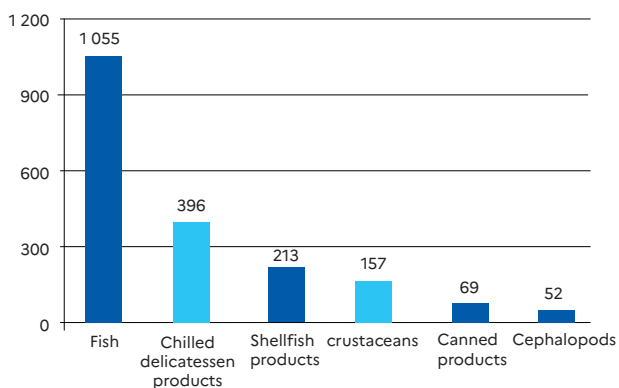


(1) Data collection methodology is detailed on inside back cover - (2) Net weight

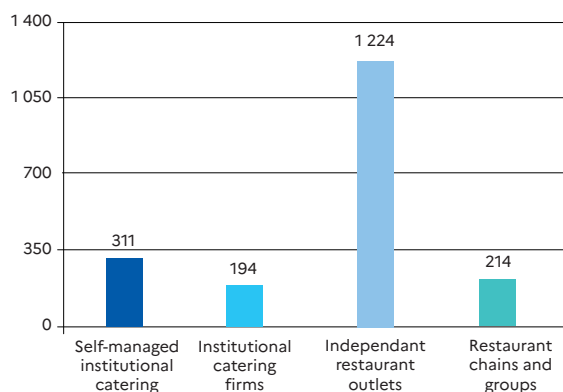
- Catering purchases**

## Spending for the catering sector in 2017

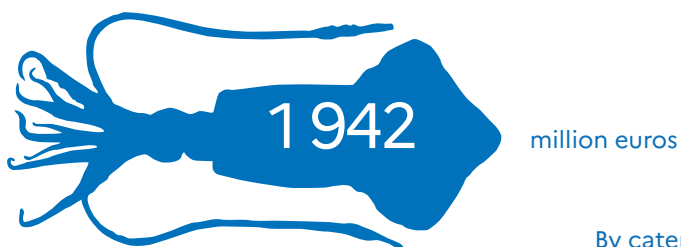
By kind of product (million euros)



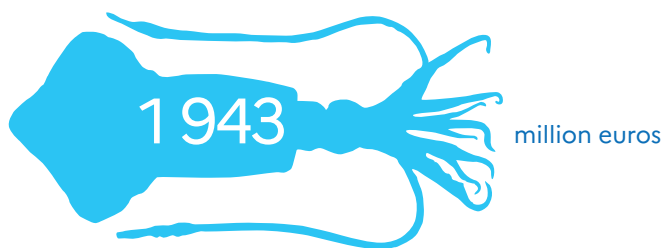
By catering outlet (million euros)



By kind of product



By catering outlet



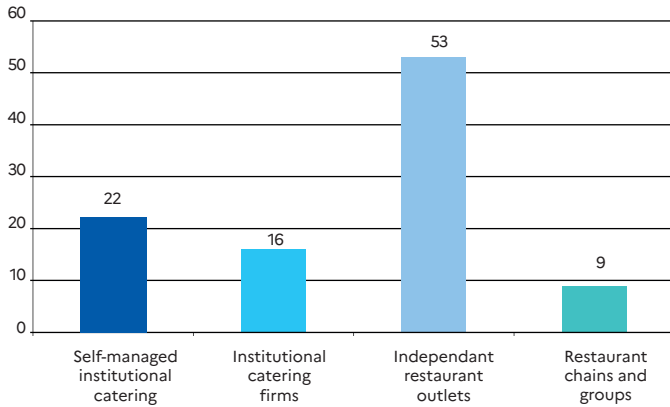
Source : FranceAgriMer from GiraFoodService

# • Catering purchases

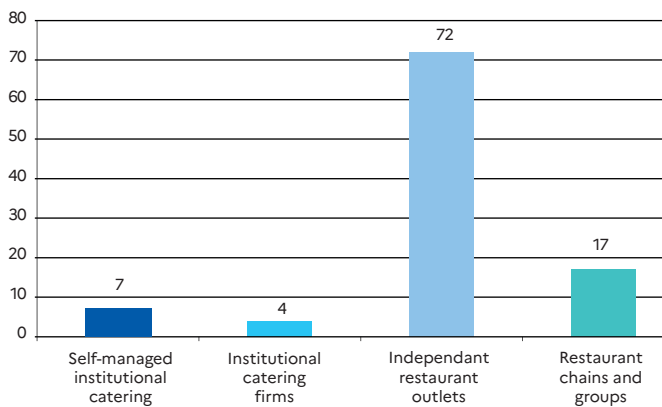


## Purchases in volume by kind of products in 2017

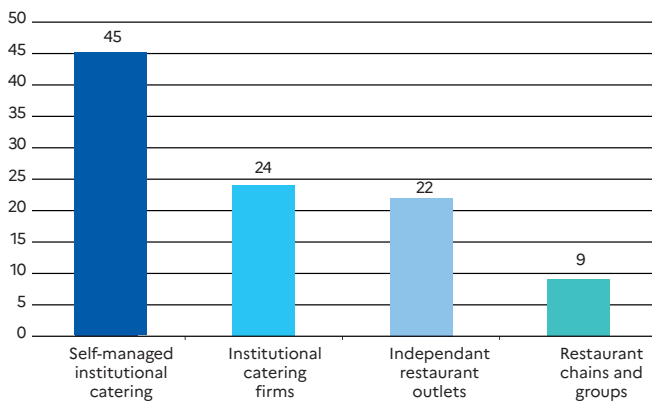
Fish products (%)



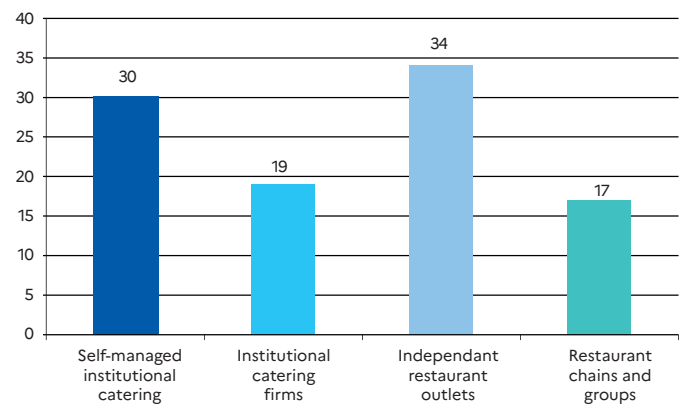
Shellfish products (%)



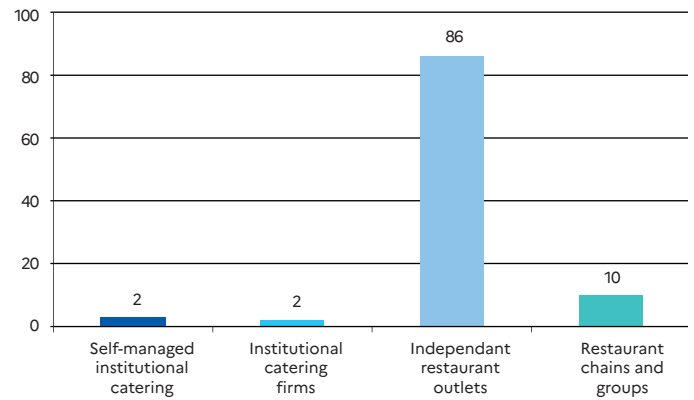
Canned products (%)



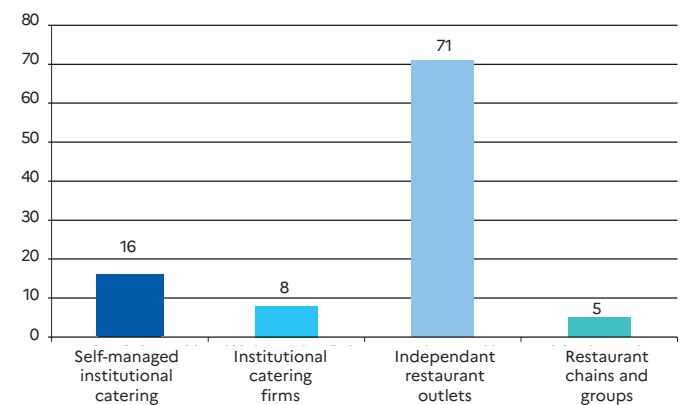
Chilled delicatessen products (%)



Crustaceans (%)



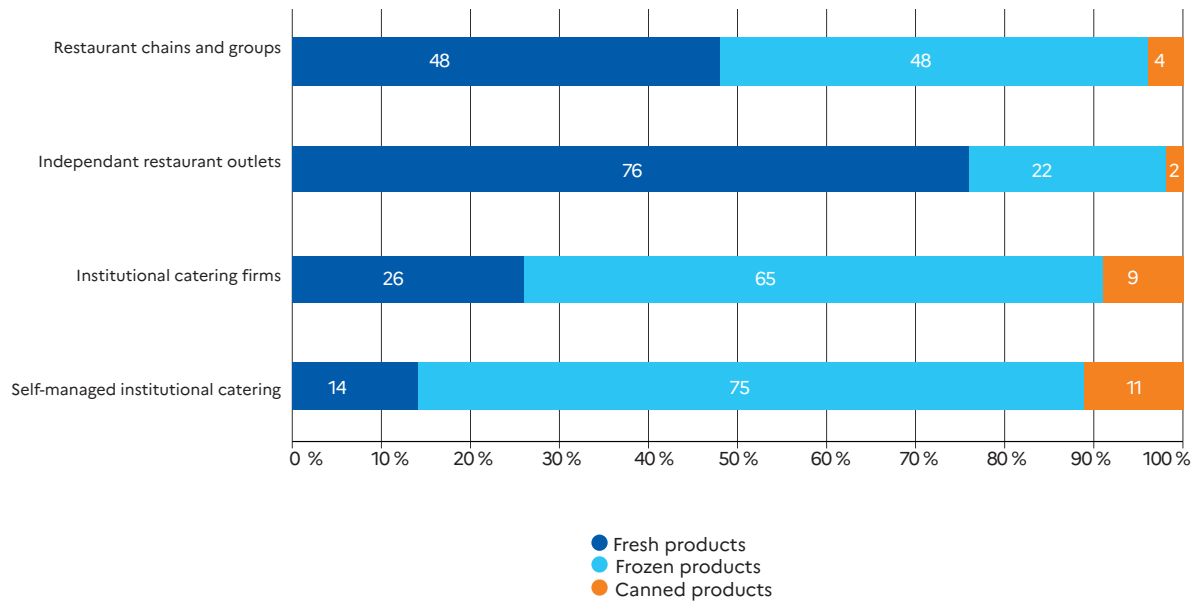
Cephalopods (%)



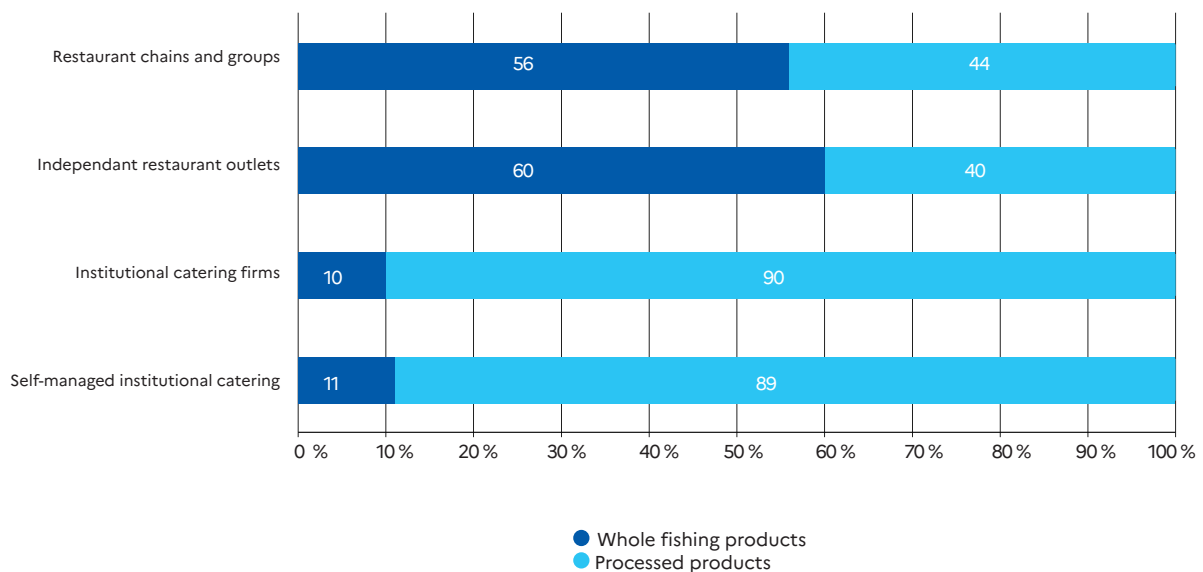
Source : FranceAgriMer from GiraFoodService

## • Breakdown of purchases by distribution channel

Breakdown of purchases by kind of conservation for different outlets (quantities)



Breakdown of purchases by outlet for different presentations (quantities)<sup>(1)</sup>



(1) Including hard discount, freezer centres and home delivery - (2) Including direct sales - (3) Net weight

Source : FranceAgriMer from GiraFoodService

# DATA COLLECTION METHODOLOGY

Data Included data are the last available on Mars the 31th 2021.

## Foreign

Trade Raw Import/export data are provided by French Customs on a net weight basis. It is converted here into their live weight equivalent, i.e. before any product processing, using coefficients that have been established for each product code.

## Processing

Processing firms data arise from a survey carried out in 2017 among main or secondary processing activity identified firms. Besides, information about non-processing trading firms arises from FranceAgriMer's updated fish trading firms database (notably from the French National Institute for Statistics and Economic Studies' firm lists, sanitary approvals, financial databases and professional sources).

## Consumption

French consumption may be measured in two ways:

- firstly, by calculating supply balance or apparent consumption (production + imports - exports),
- secondly by using consumer and restaurant panels.

Apparent consumption is measured in live weight equivalent and includes the overseas territories (French Caribbean Islands, Reunion Island, Mayotte and French Guyana). In contrast, consumer and restaurant data are expressed in net weight, meaning the weight as purchased by the final consumer (consumer panel) or by restaurants (restaurant panel), and exclude consumption in the overseas territories (and in Corsica for consumer panels). Panel data is based on declarations made by consumers and restaurant buyers and is thus non-exhaustive. Coverage varies according to the product in question, and the overall rate of coverage is approximately 80%.

To find out more information, especially about prices at all levels of the sector (production, trade, consumption), and their trends:

- FranceAgriMer Annual report 2020 of sales reported in tide halls
- FranceAgriMer Annual report 2020 of foreign trade in fishery products and aquaculture \*
- FranceAgriMer Annual report 2020 on the consumption of fishery products and aquaculture \*

\* coming 2021

VISIOMer inter-channel and off-the-shelf network sales data  
MAA Ministry of Agriculture and Food  
DPMA Maritime Fisheries and Aquaculture Branch  
DAM Maritime Affairs Directorate  
Ifremer Research Institute for the Exploitation of the Sea












# DATA



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