



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 (2023)

Production - Firms - Trade - Consumption

SUMMARY

Production page 2

France in the EU-28 & in the world in 2019
Total sales of fisheries and aquaculture products
Sales of fisheries products at auction
Sales of aquaculture products
Fishing fleet
Aquaculture firms
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Firms page 14

Fishmonger firms
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Processing firms

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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

Consumption page 24

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



PRODUCTION

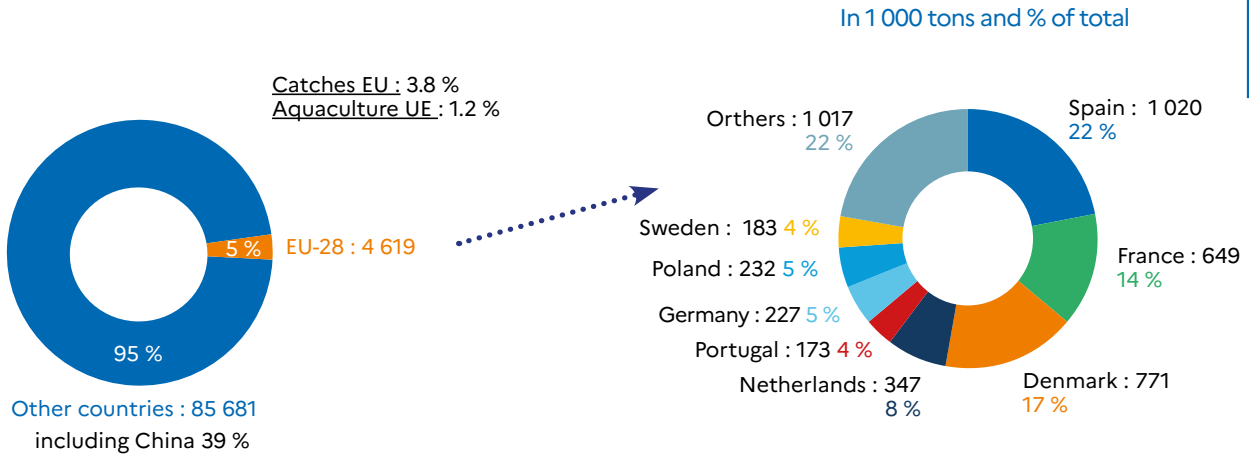
FISHING FLEET / AQUACULTURE FIRMS / JOBS

Total sales of fisheries and aquaculture products



• Total sales / metropolitan France and overseas territories

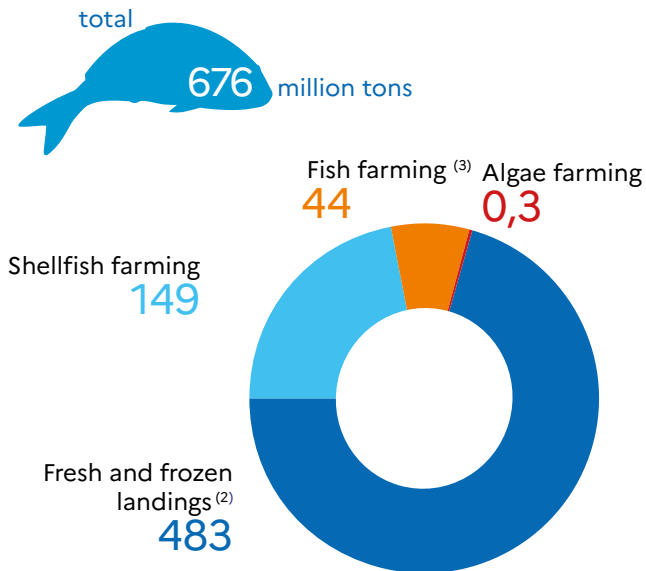
France in the EU-28 and in the world in 2020



Source : FAO

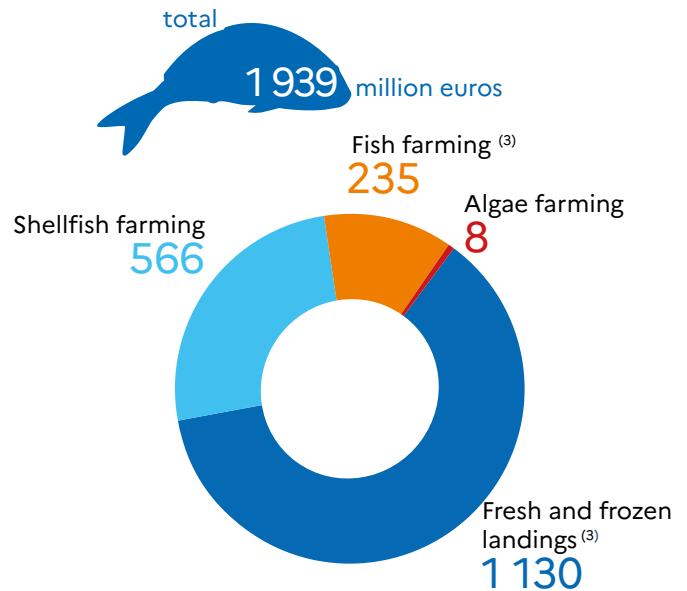
Quantities sold in 2021⁽¹⁾

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



Values of sales in 2021⁽²⁾

by method of production (millions euros)



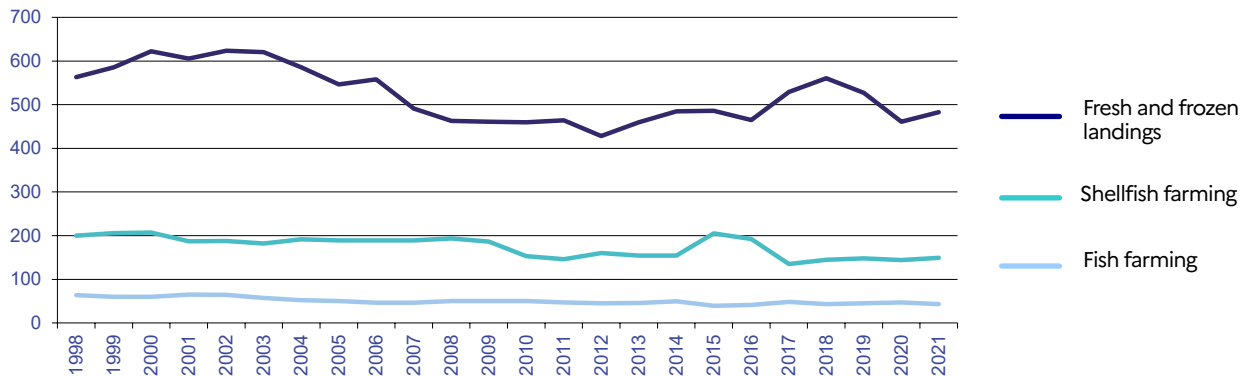
(1) Excluding seaweeds
 (2) Equivalent live weight
 (3) Auction sales, sales to processing industry and export sales

Source : MAA / DPMA / BSPA / EUMOFA / FAO

- **Total sales / metropolitan France and overseas territories**

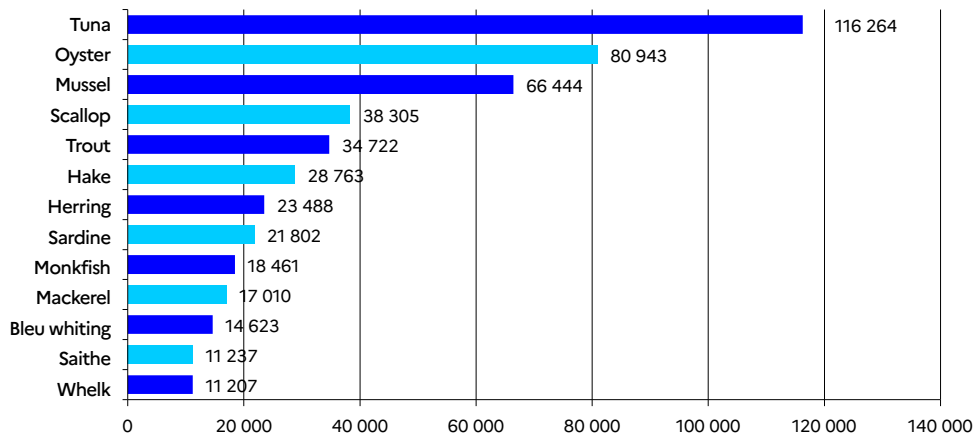
Changes in quantities sold in metropolitan France ⁽¹⁾

(1 000 tons) (1)



Main species sold in metropolitan France in 2021 ^{(1) (2)}

(in tons) (1)



(1) Excluding seaweeds

(2) Total sales from french vessels : sales at auctions, direct sales, sales to processing industry and export sales

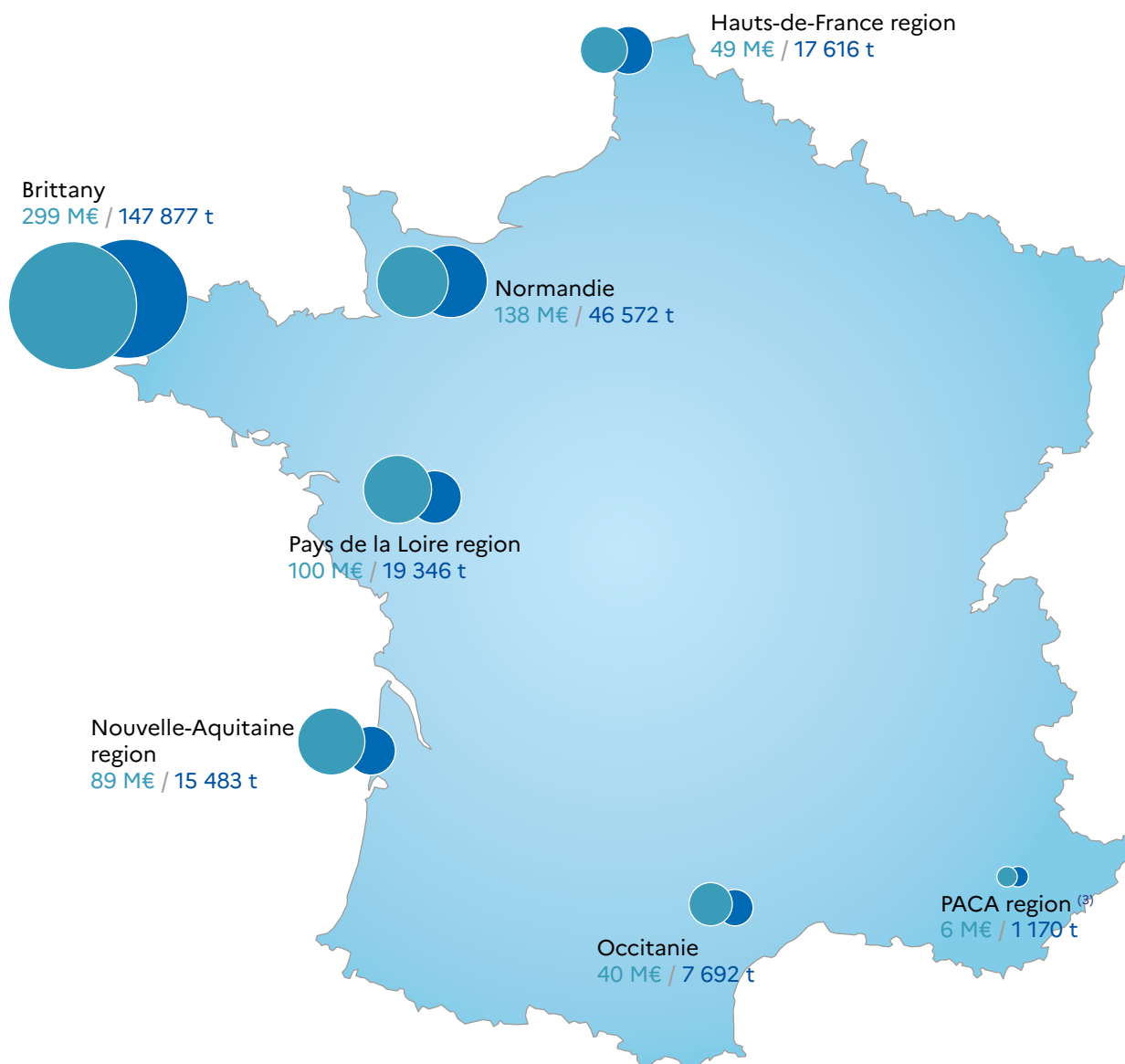
Source : MAA /DPMA

• Sales of fishery products

Fresh and frozen landings by region in 2022 ⁽¹⁾

Sales

Value (million euros) / Quantity (tons) ⁽²⁾



⁽¹⁾ Excluding seaweeds and freshwater fishing

⁽²⁾ In net weight

⁽³⁾ Sales without auction - VISIOMer

Source : VISIOMer/FranceAgriMer

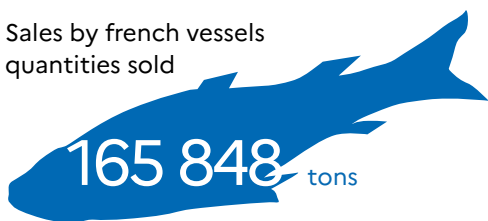
• Sales of fishery products

Sales of fishery products at auction in 2022

Number of auctions in 2022 : **35**

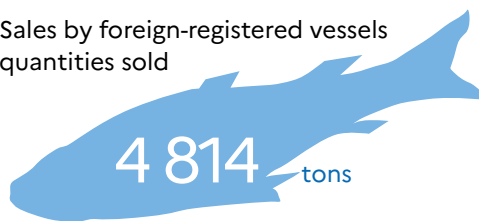


Sales by french vessels
quantities sold



Value of sales **660** million euros

Sales by foreign-registered vessels
quantities sold

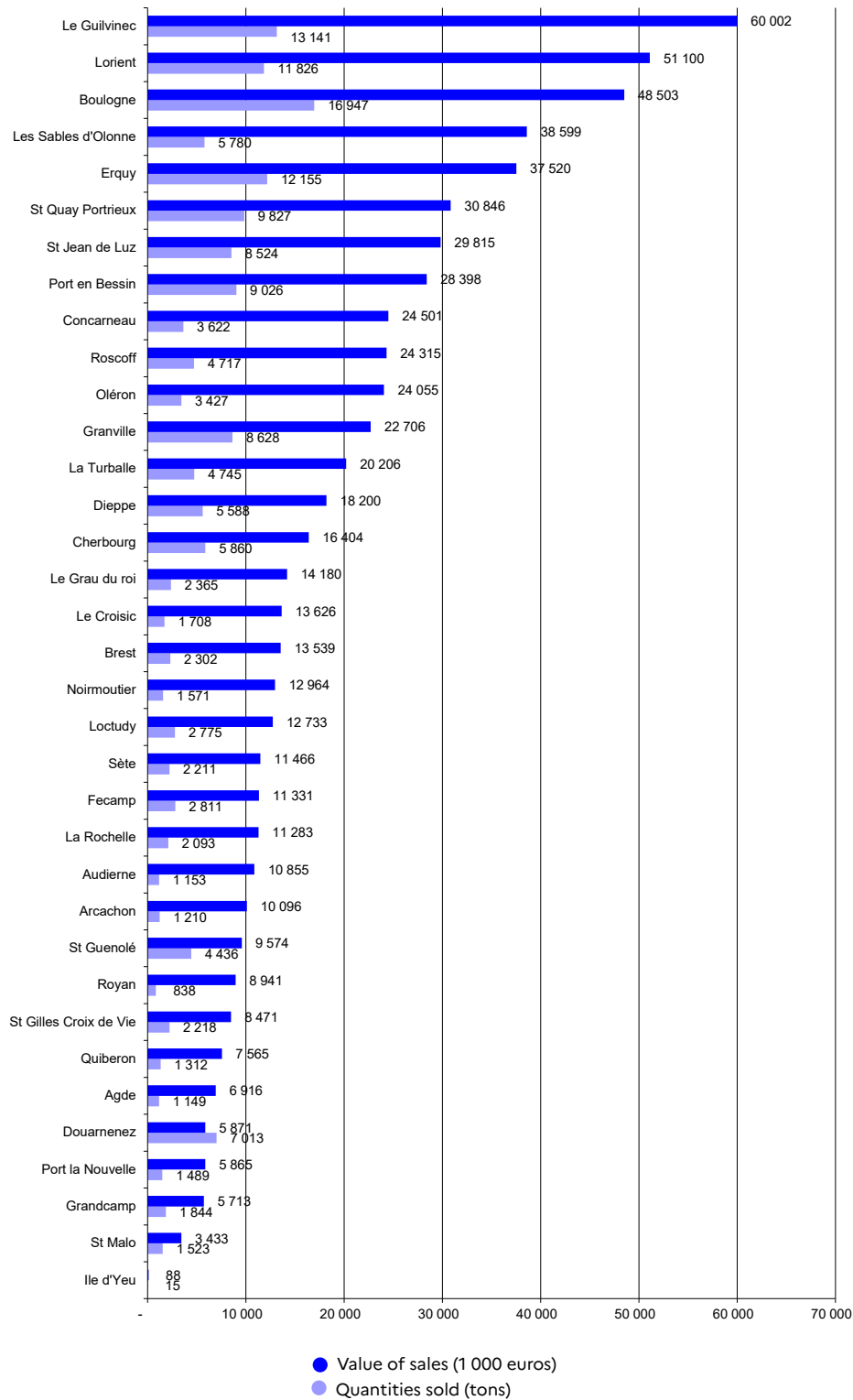


Value of sales **16** million euros

Source : VISIOMer/ FranceAgriMer

• Sales of fishery products

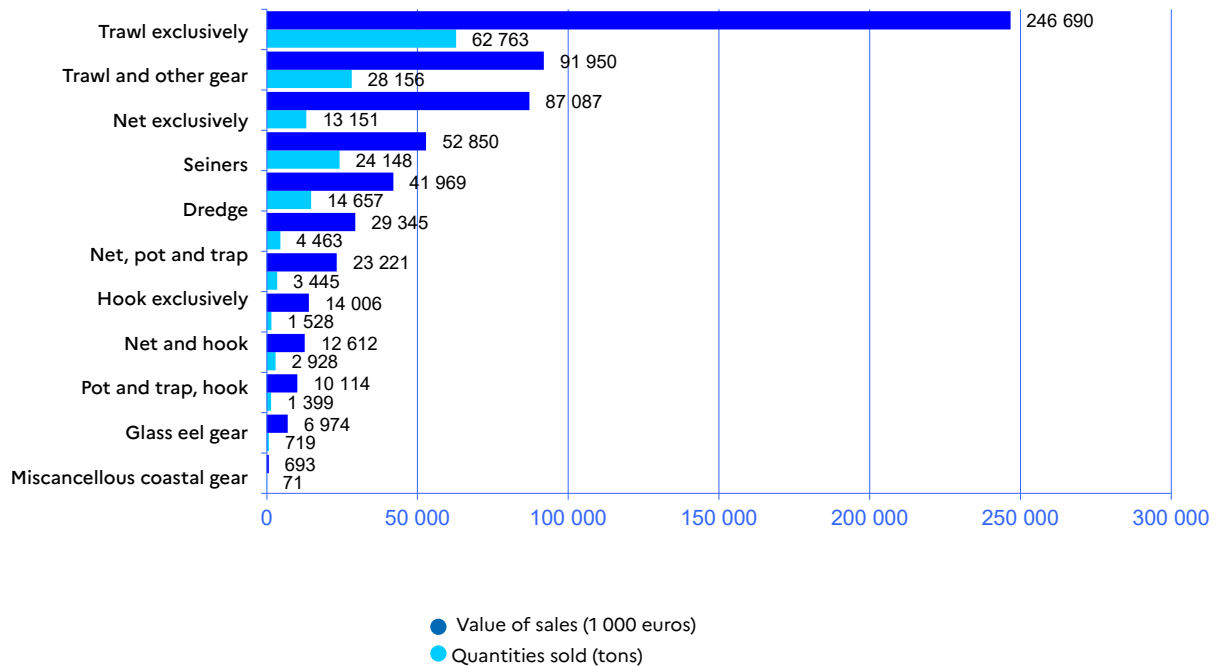
Quantities sold and value of sales by french vessels at auctions in 2022



Source : VISIOMer / FranceAgriMer

• Sales of fishery products

Breakdown of quantities sold and value of sales at auction in 2022 by fleet segment ⁽¹⁾ ⁽²⁾ ⁽³⁾



Number of vessels (sales at auction in 2022) ⁽¹⁾ ⁽²⁾ ⁽³⁾

Trawl and other gear	383
Trawl exclusively	329
Net exclusively	251
Dredge	252
Net, pot and trap	242
Miscellaneous coastal gear	37
Hook exclusively	144
Glass eel gear	157
Pot and trap exclusively	134
Pot and trap, hook	87
Net and hook	86
Seiners	65
Total	2 706

(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

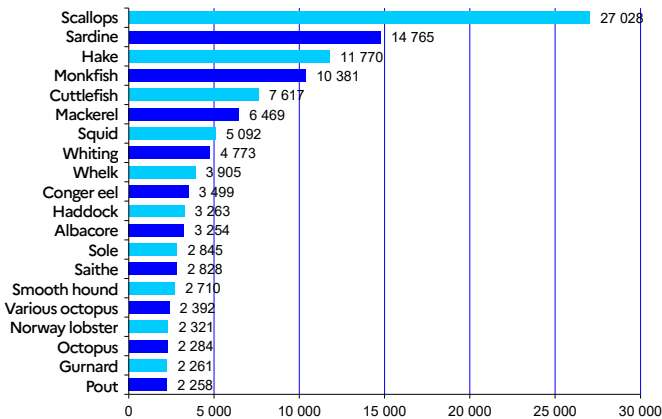
Sales of fishery products



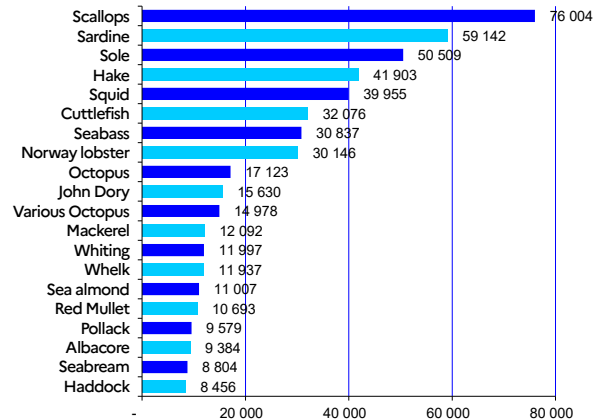
PRODUCTION

Main species sold at auction by french vessels in 2022

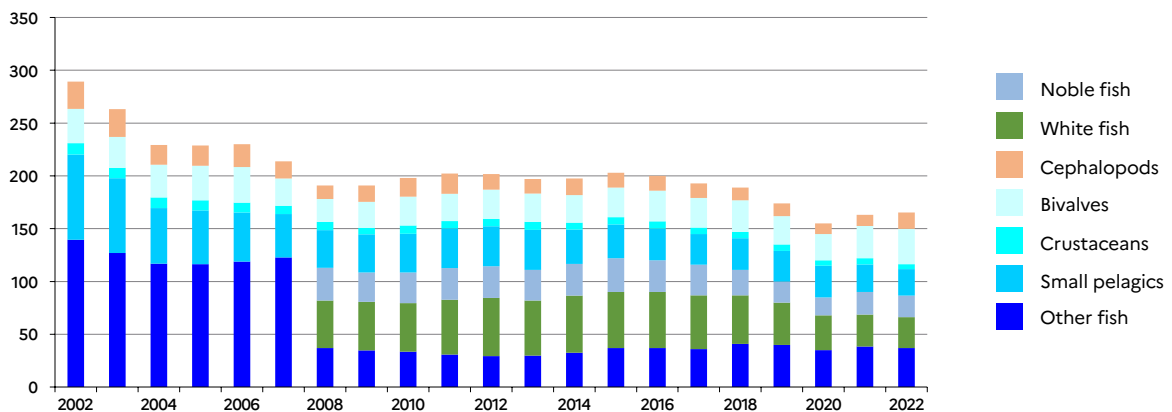
Quantities sold (in tons)



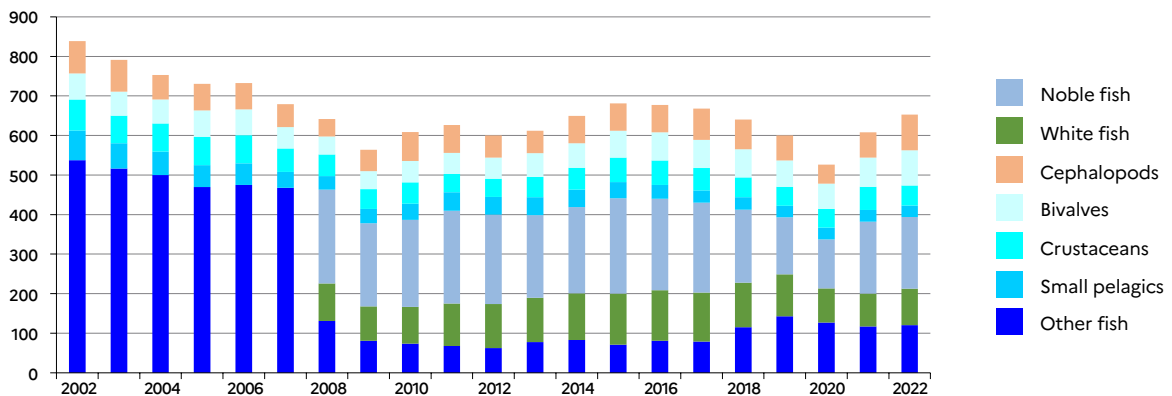
Value of sales (1 000 euros)



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)

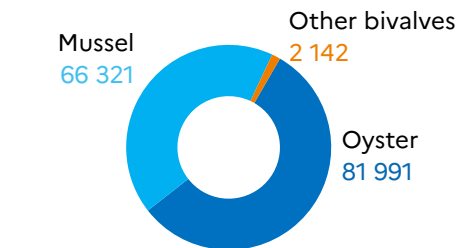


Source : VISIOMer - FranceAgriMer

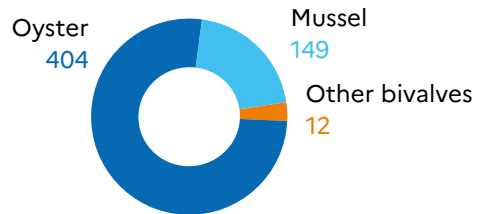
• Sales of aquaculture products in metropolitan France

Shellfish farming 2022

Quantities sold for consumption (in tons)⁽¹⁾

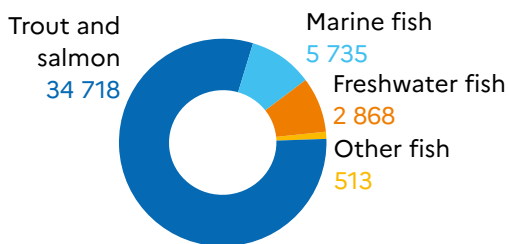


Value of sales (million euros)

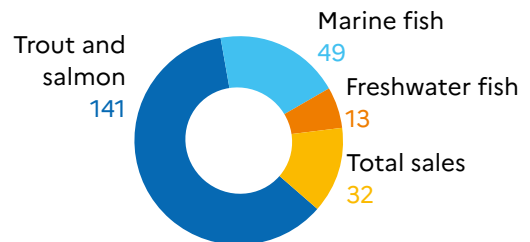


Fish farming 2022

Quantities sold for consumption (in tons)⁽¹⁾

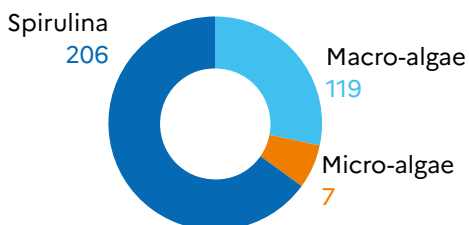


Value of sales (million euros)

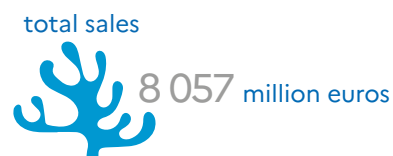
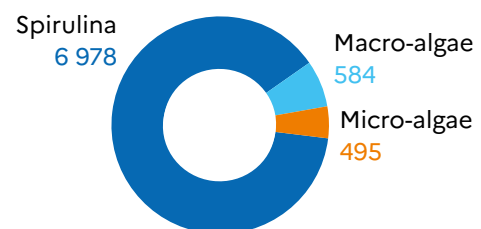


Algae farming 2022

Quantities sold for consumption (in tons)⁽¹⁾



Value of sales (million euros)



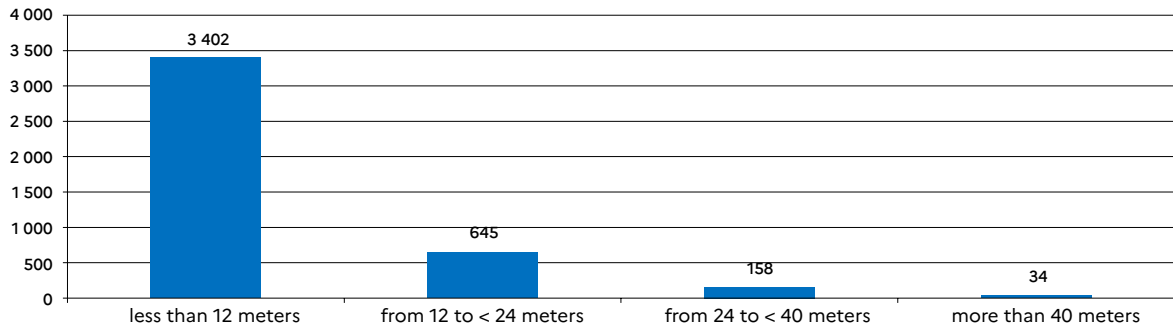
(1) Equivalent live weight

Source : DPMA Agreste data - Annual survey from SSP

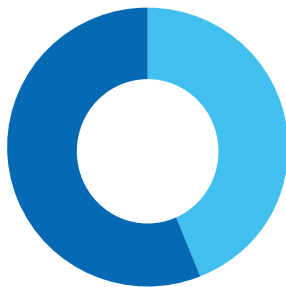
• Fishing fleet

Fishing fleet

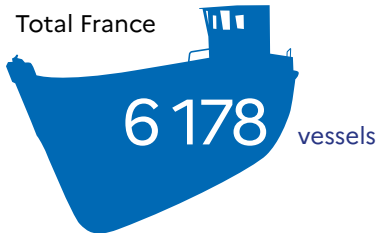
Breakdown of total vessels by length in 2021



Metropolitan France
4 239



Overseas territories
1 939



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

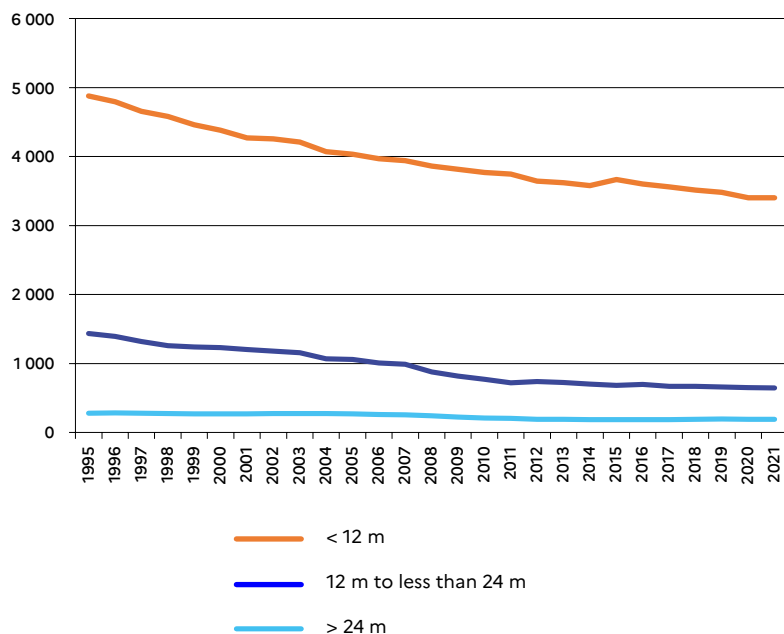
vessels over 1 000 GRT (gross register tonnage) or vessels over 150 GRT if out of port more than 20 days

(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 : fleet file from IFREMER 2020

• 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
2020	3 403	649	191
2021	3 402	645	192

Source : fleet file from IFREMER 2020

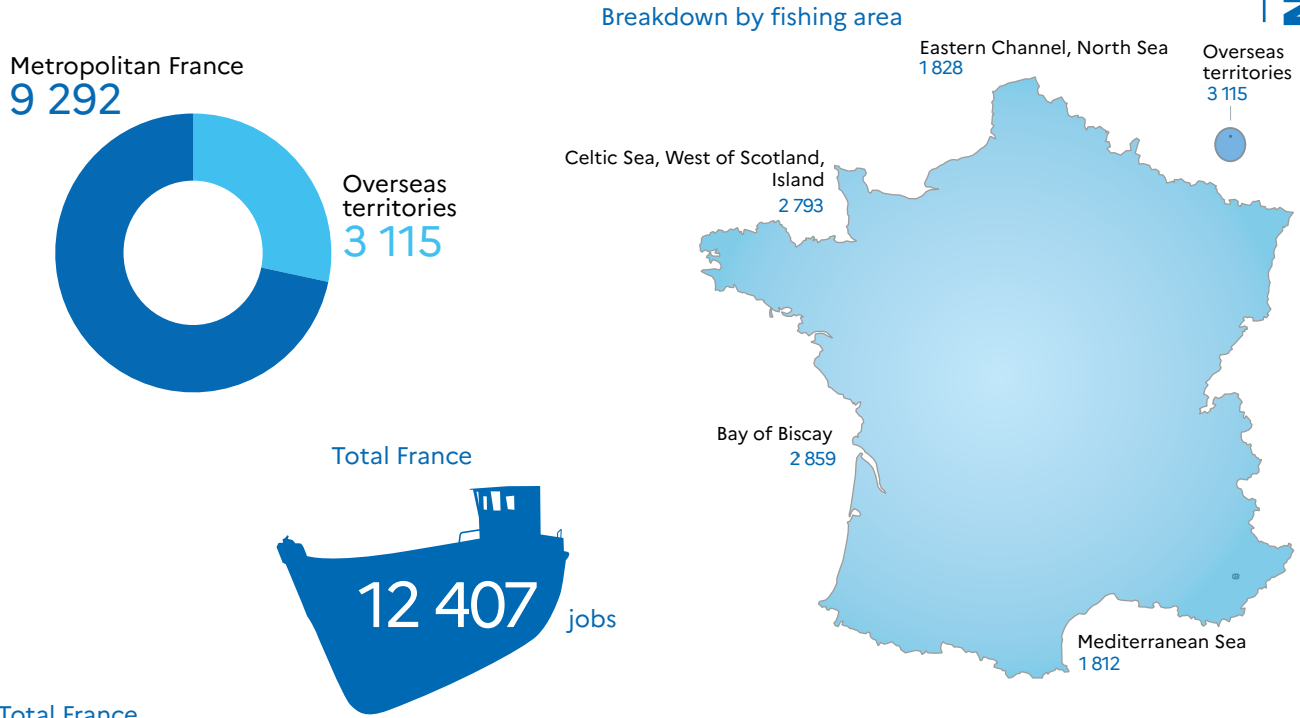
Aquaculture firms in 2021

Shellfish farming - including seaweed and shrimps	2 294
marine fish farming and sturgeon	34
Continental salmonids farming	364
Algae farming	200

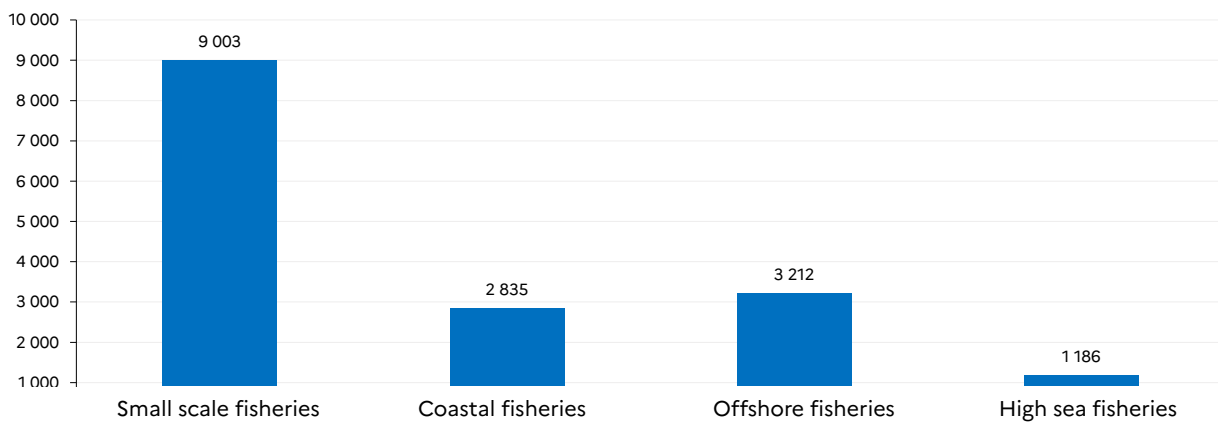
Source : DPMA Agreste data - Annual survey from SSP

Jobs

Number of seamen employed on board french fishing vessels in 2020 (seamen of all nationalities)



Total France



Number of full time equivalent jobs in 2021

	Jobs	FTEJ
Shellfish farming	18 298	8 861
Fish farming	2 931	2 023
Algae farming	459	381

Source : DPMA Agreste data



FIRMS

FISHMONGERS / TRADING / PROCESSING

By sales / By region



• Fishmonger firms



FIRMS

Fishmonger's in 2016

Number of establishments



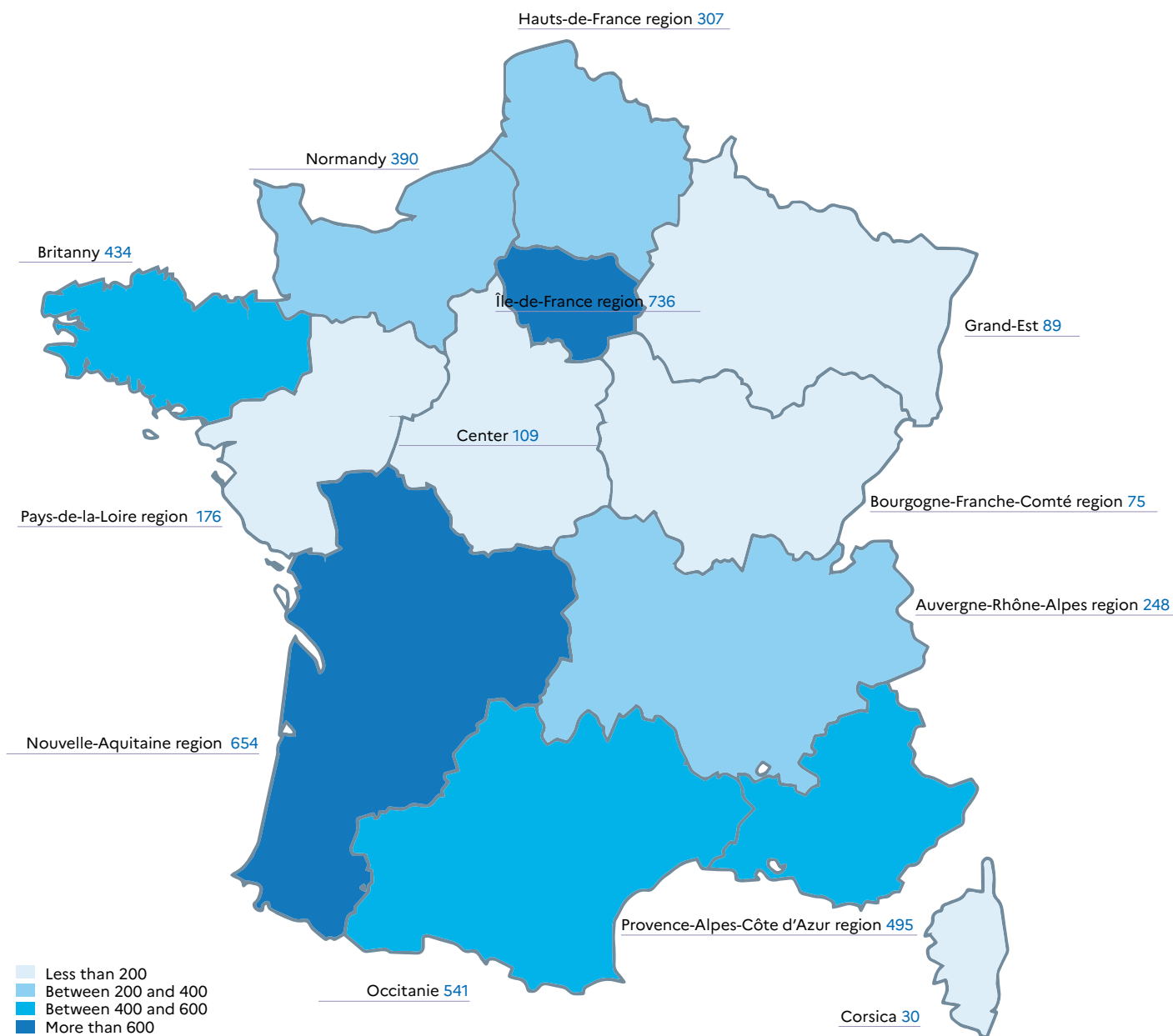
Hand sales



Full time equivalent jobs



Number of establishments per region



Source : ViaAqua and Protéis for FranceAgriMer

• Trading firms

Trading firms in 2021

Number of firms ⁽¹⁾



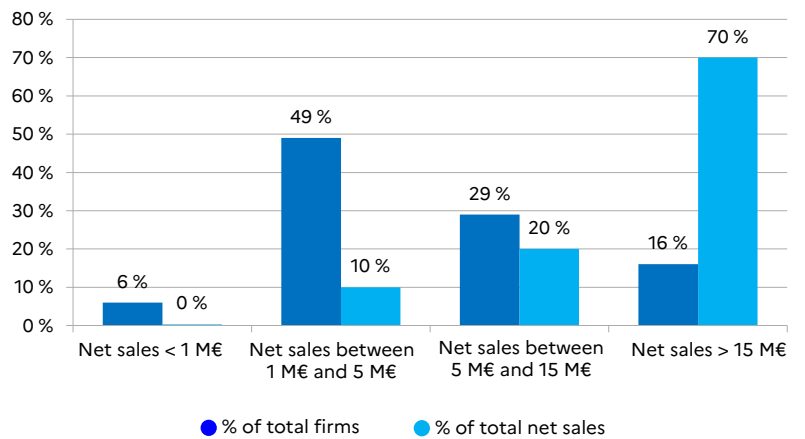
Jobs ⁽¹⁾



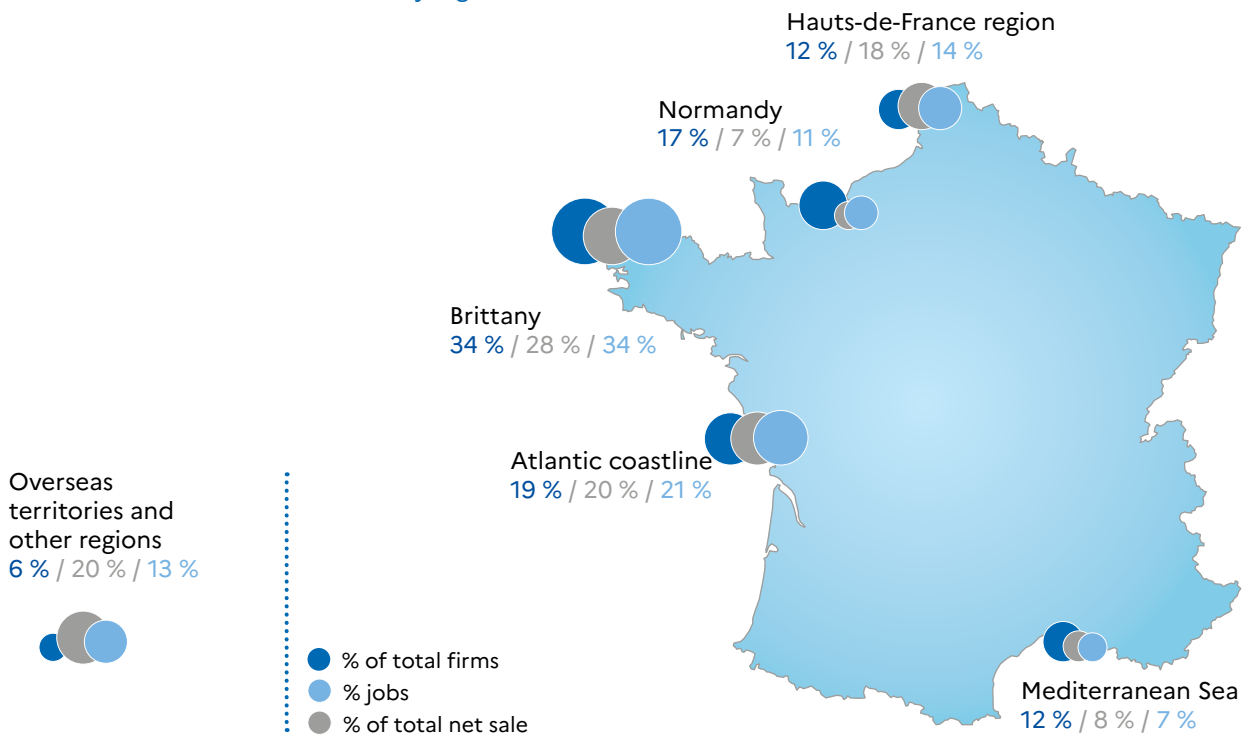
Net sales (million euros) ⁽¹⁾



Breakdown of firms by total net sales



Breakdown of firms and total net sales by region



Source : FranceAgriMer

(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) ⁽¹⁾



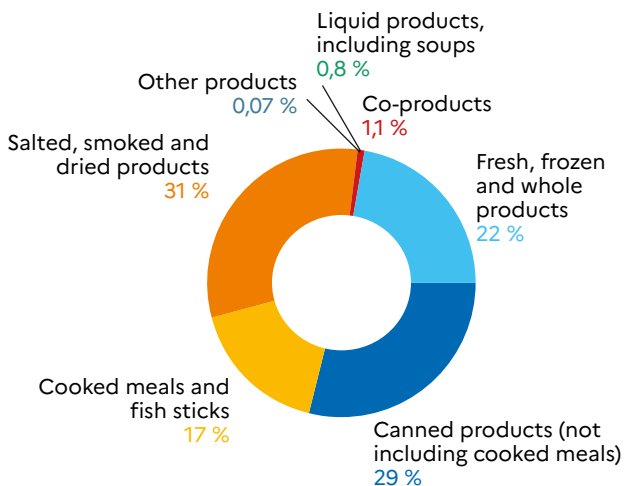
including seafood and fish farming processing



Jobs

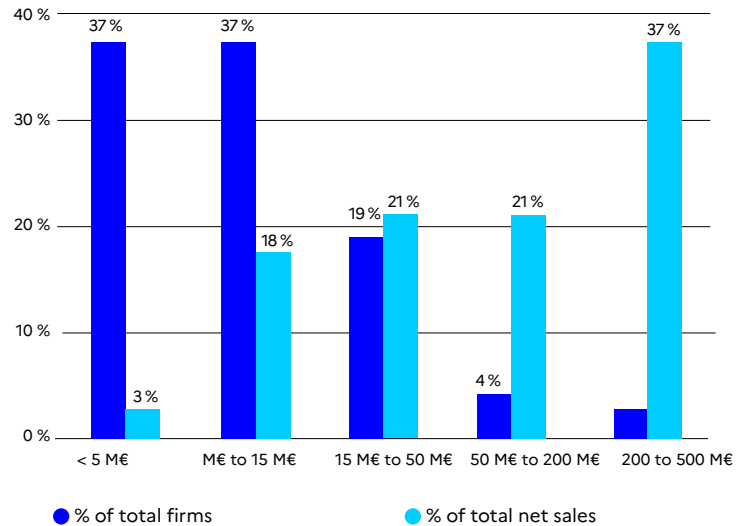


Seafood processing net sales ⁽³⁾

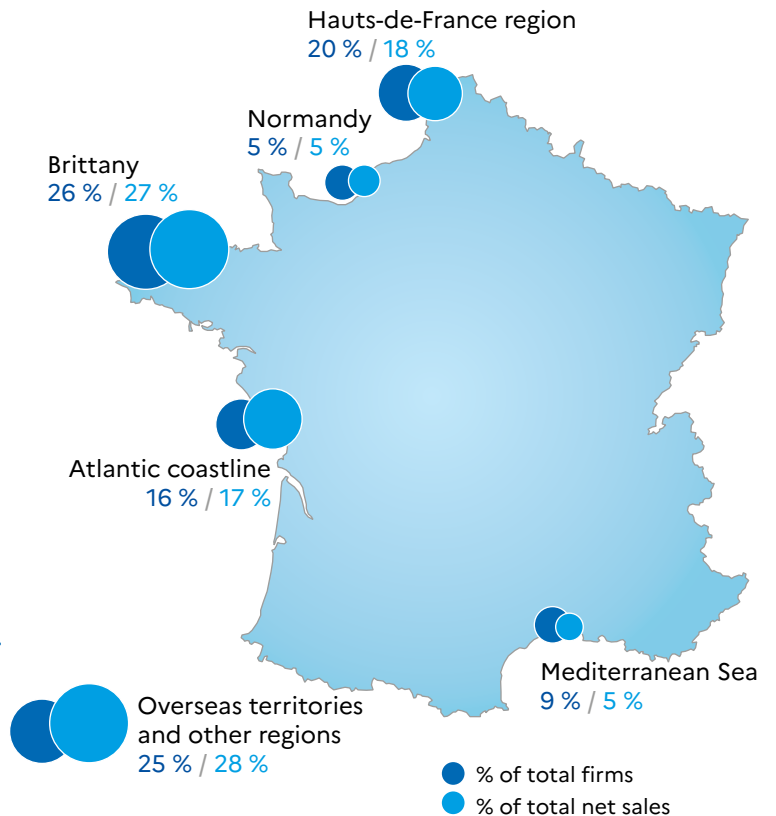


(1) Filleting, cutting, peeling, packaging, surgelation
 (2) Seaweeds, in fish products, others
 (3) Small sample estimation

Breakdown of firms by total net sales ⁽³⁾



Breakdown of processing firms and sales by region



Source : FranceAgriMer



TRADE

IMPORTS / EXPORTS

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



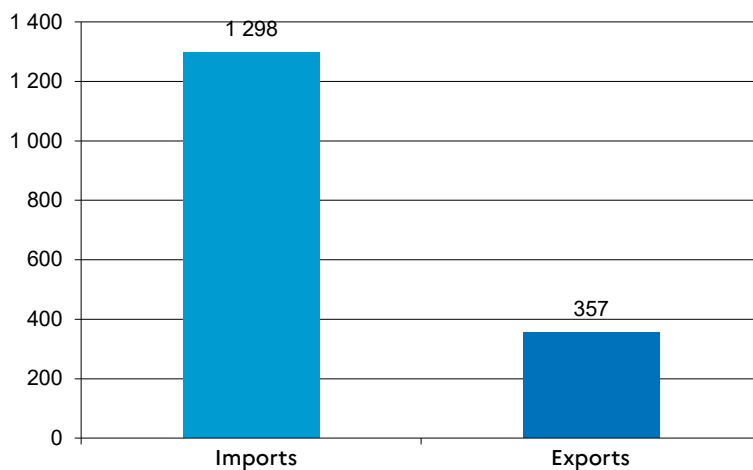
• Supply balance



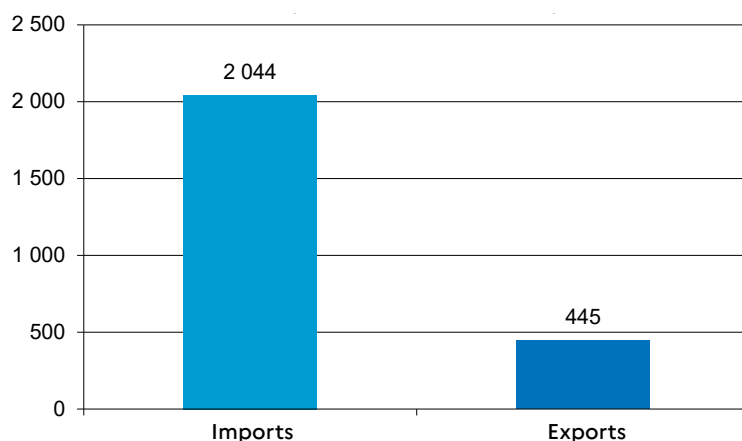
TRADE

Supply balance in 2021

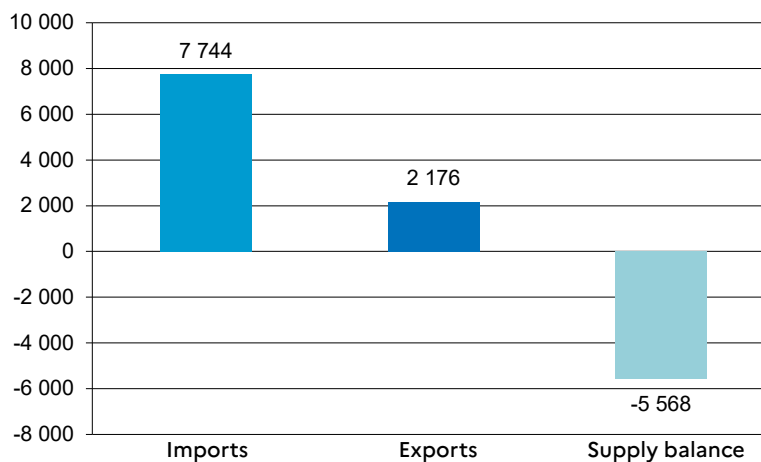
Net weight (1 000 tons)



Live weight (1 000 tons)



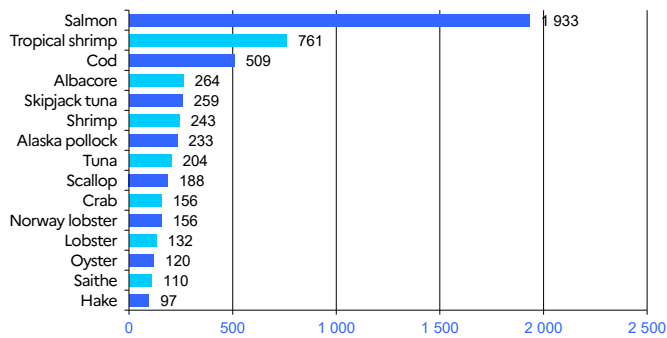
Value (million euros)



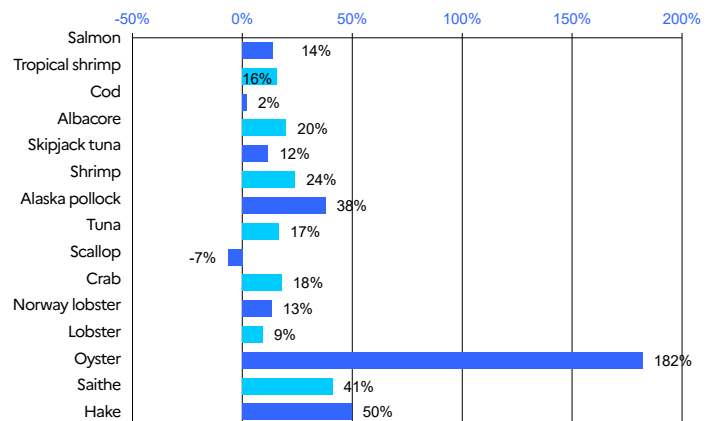
Imports and exports / metropolitan France and overseas territories

Imports - main species in 2022

Value (million euros)

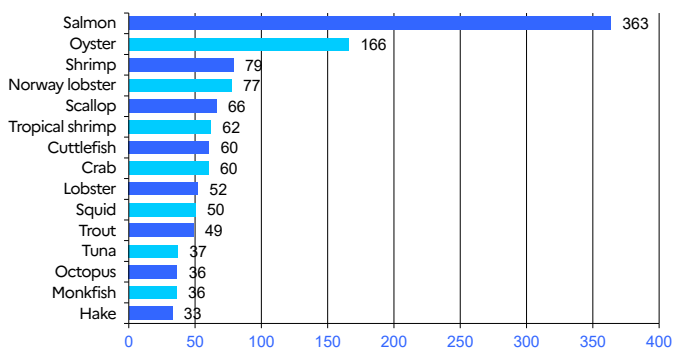


Evolution 2022/21 (en %)

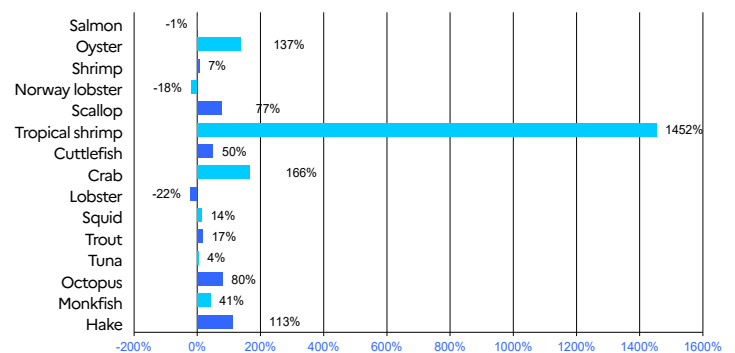


Exports - main species in 2022

Value (million euros)



Evolution 2022/21 (en %)



Source : French customs

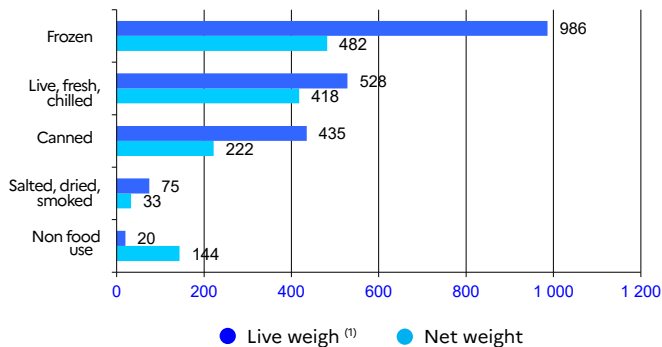
Imports and exports / metropolitan France and overseas territories



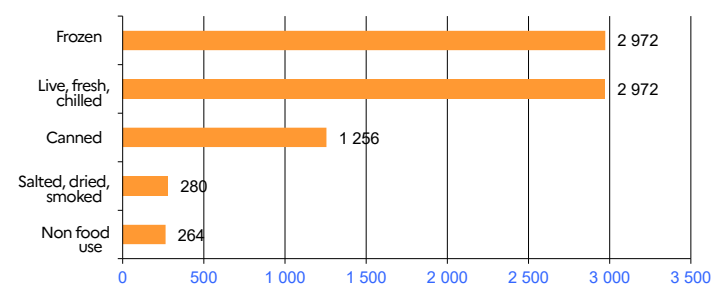
TRADE

Imports by presentation in 2022

Imports by volume (1 000 tons)

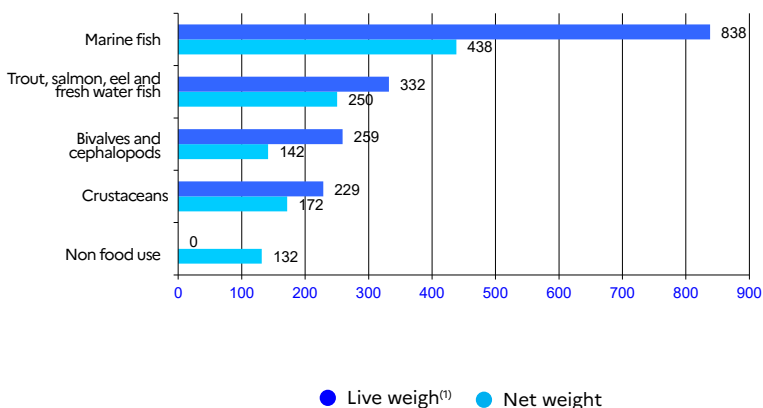


Imports by value (million euros)

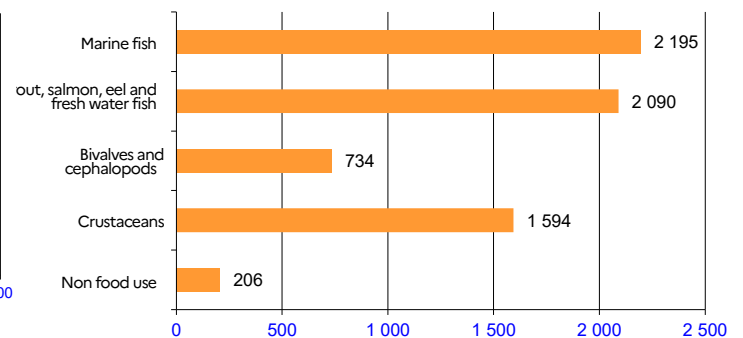


Imports by species group in 2022

Imports by volume (1 000 tons)



Imports by value (million euros)



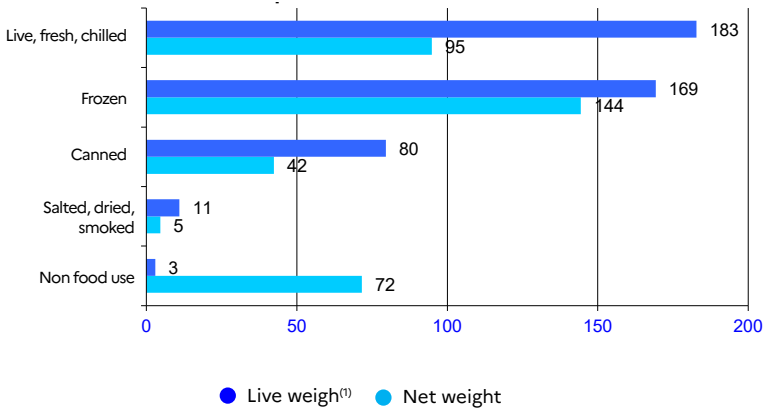
(1) Data collection methodology is detailed on inside back cover

Source : French customs

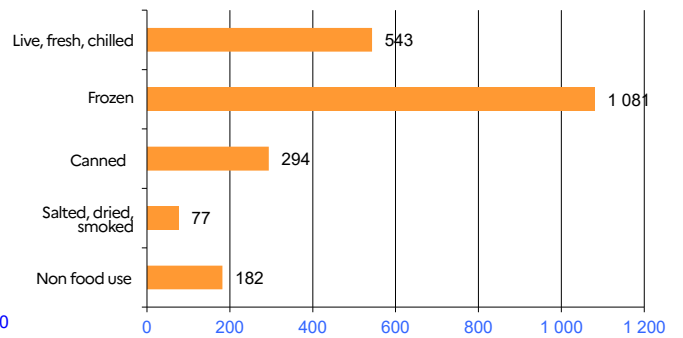
Imports and exports / metropolitan France and overseas territories

Exports by presentation in 2022

Exports by volume (1 000 tons)

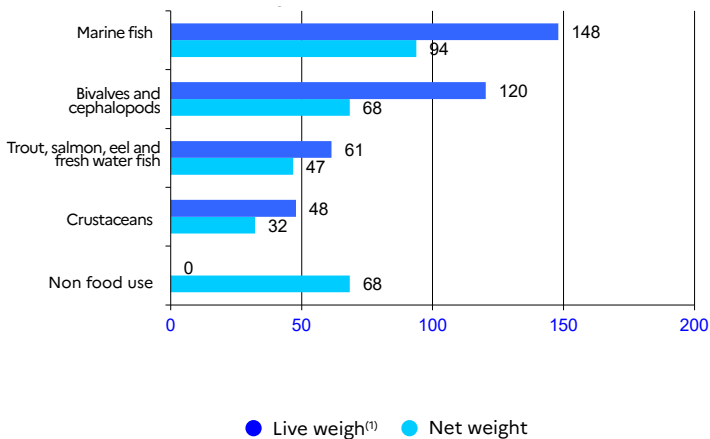


Exports by value (million euros)

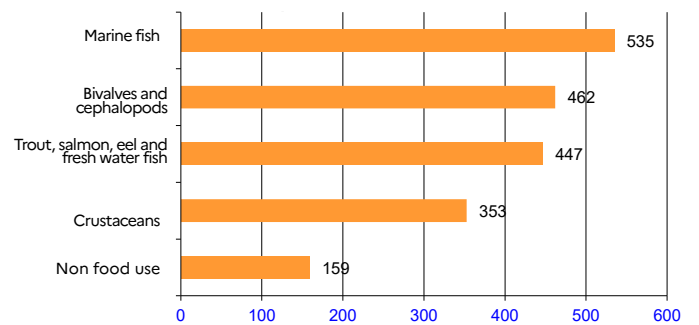


Exports by species group in 2022

Exports by volume (1 000 tons)



Exports by value (million euros)



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

Source : French customs

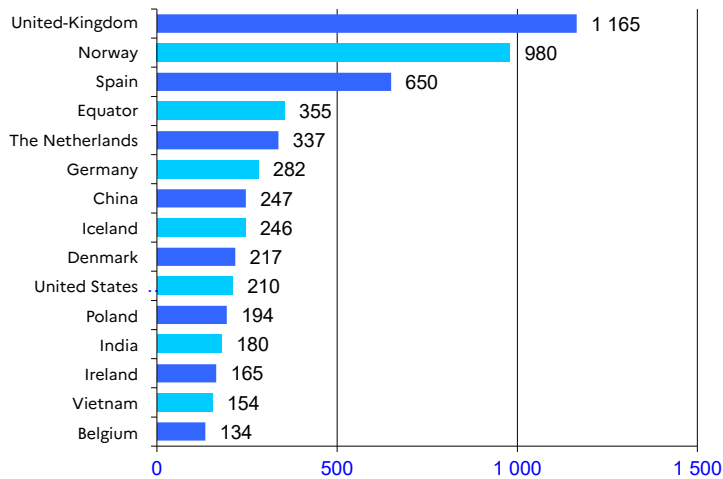
Imports and exports / metropolitan France and overseas territories



TRADE

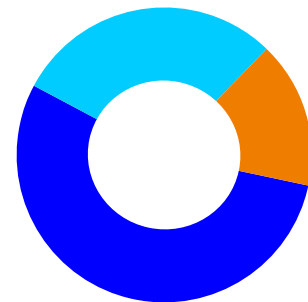
Imports of aquatic products by geographical origin in 2022

Value (millions euros)



2 432

European Union of 27



1 227

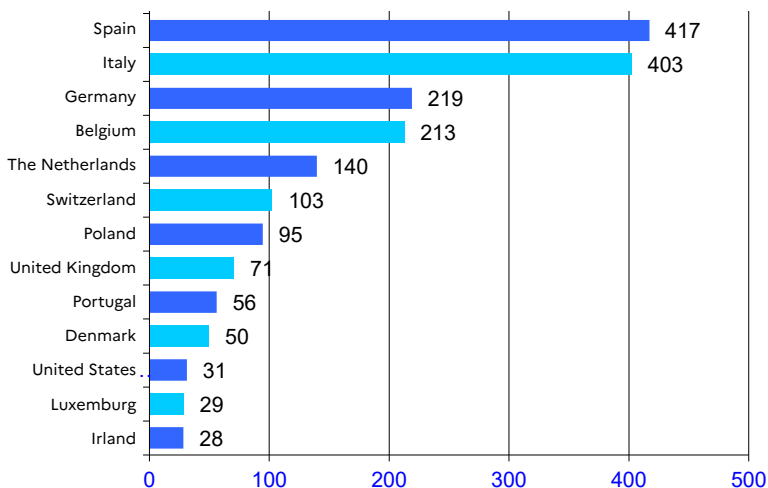
EFTA (Norway, Iceland, Switzerland)

4 085

Other countries

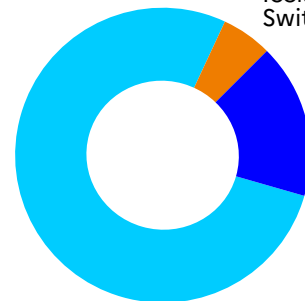
Exports of aquatic products by destination in 2022

Value (million euros)



117

EFTA (Norway, Iceland, Switzerland)



290

Other countries

1 769

European Union of 27

Source : French customs



CONSUMPTION

SUPPLY BALANCE / PURCHASES

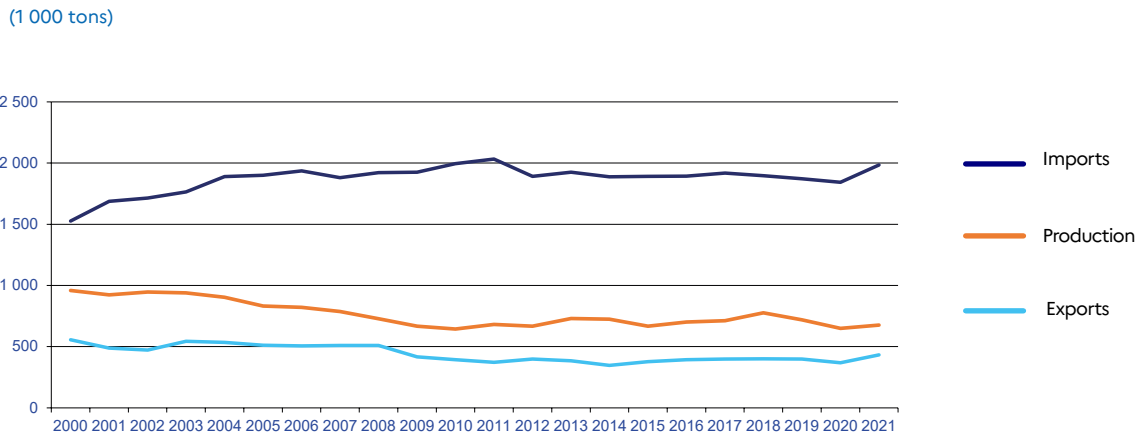
Households / Catering / Breakdown of purchases by distribution channel



• Supply balance

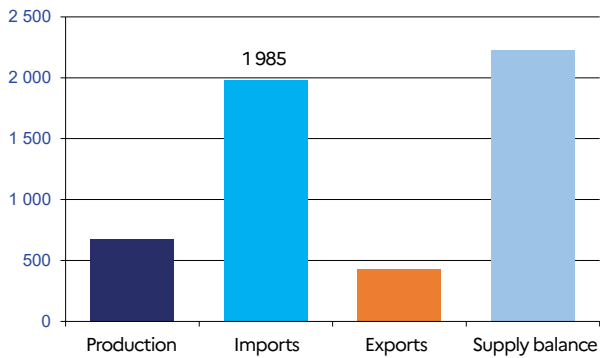


Balance changes in production, imports, and exports (1) (2)

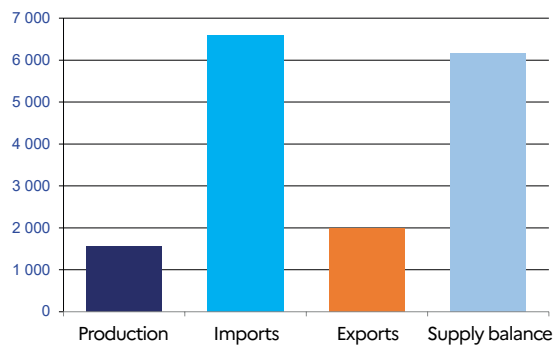


Supply balance in 2021

In volume (1 000 tons)



In value (million euros)



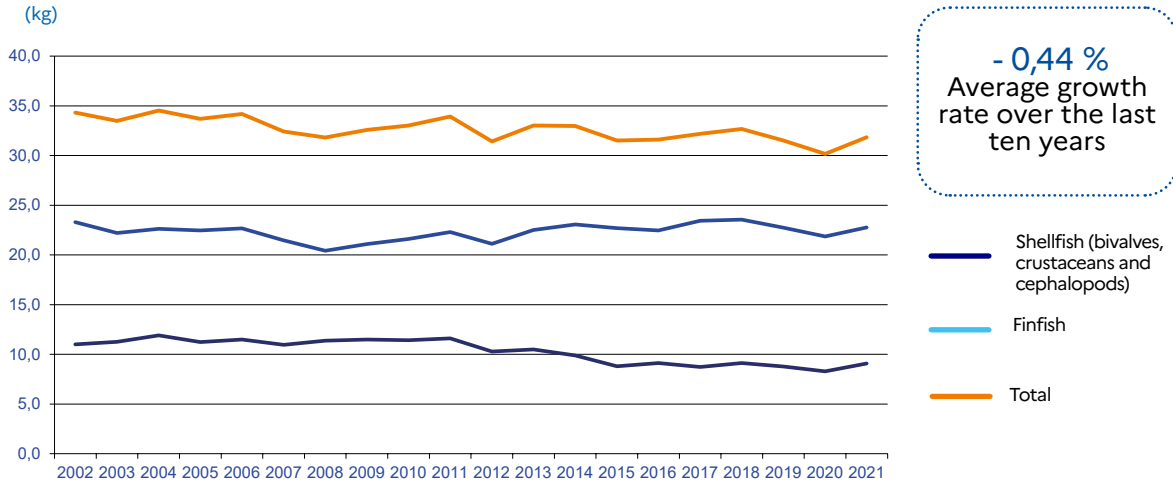
(1) Data collection methodology is detailed on inside back cover

(2) Live weight

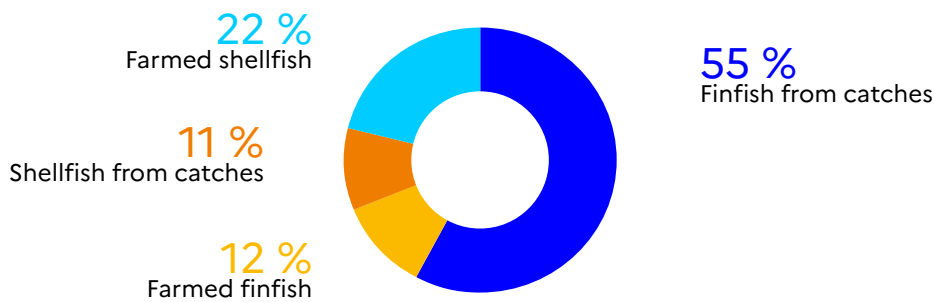
Source: FranceAgriMer

• Supply balance

Changes in supply balance ⁽¹⁾ ⁽²⁾

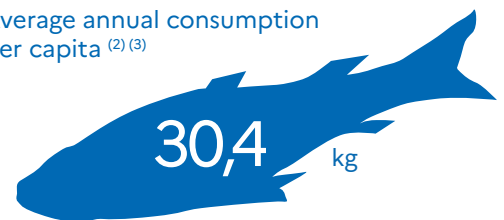


Breakdown by products in 2021 ⁽¹⁾ ⁽²⁾



Average annual consumption per capita ⁽²⁾ ⁽³⁾ (kg)	30,4
Fish farming	6,7
Salmon	4,4
Farmed shellfish and finfish	3,4
Mussel	2,1
Oyster	1,1
Shrimp	1,5
Finfish and shellfish from catches	3,8
Scallop	0,9
Fish from catches	16,6
Tuna	4,7
Cod	2,3
Alaska pollock	2,2
Sardine	1,0
Hake	0,8
Herring	0,6
Mackerel	0,7
Saithe	0,6
Monkfish	0,4

Average annual consumption per capita ⁽²⁾ ⁽³⁾



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

(2) Equivalent live weight

(3) Estimation for 2017

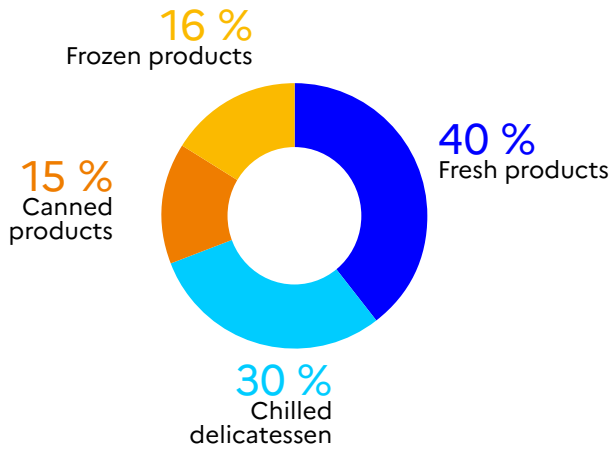
Source : FranceAgriMer, Kantar Worldpanel, Eumofa

Households purchases

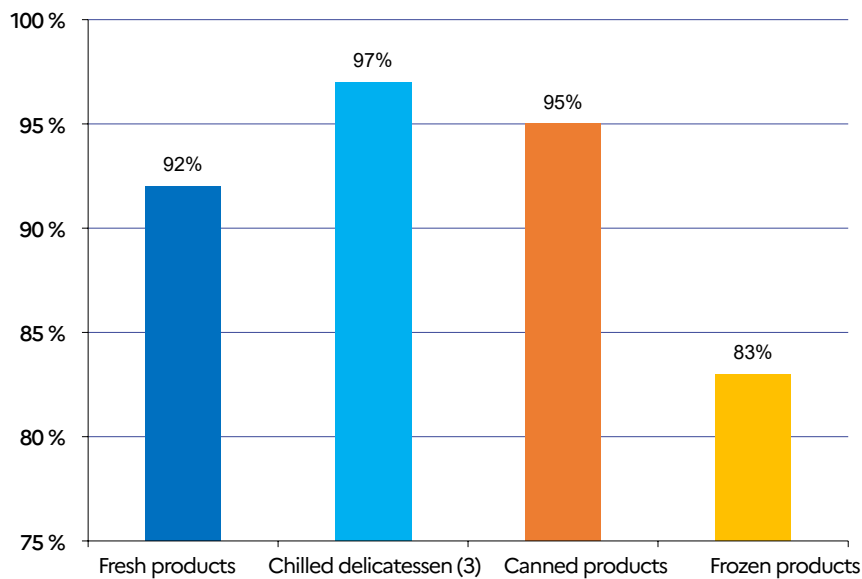


CONSUMPTION

Households spending for aquatic products in 2022 ⁽¹⁾



Percentage of purchasing households in 2022 ⁽²⁾



Households consumption over 10 years

	2012		2022		Evolution	
	Volumes (in thousands of tons)	Spendings (in thousands of €)	Volumes (in thousands of tons)	Spendings (in thousands of €)	Volumes	Values
Fresh products	272 129	2 745 373	277 802	3 377 160	2 %	23 %
Frozen products	149 443	1 476 096	116 070	1 325 901	-22 %	-10 %
Canned products	124 763	1 019 661	125 255	1 255 153	0 %	23 %
Chilled delicatessen	185 181	2 236 796	180 900	2 747 313	-2 %	23 %

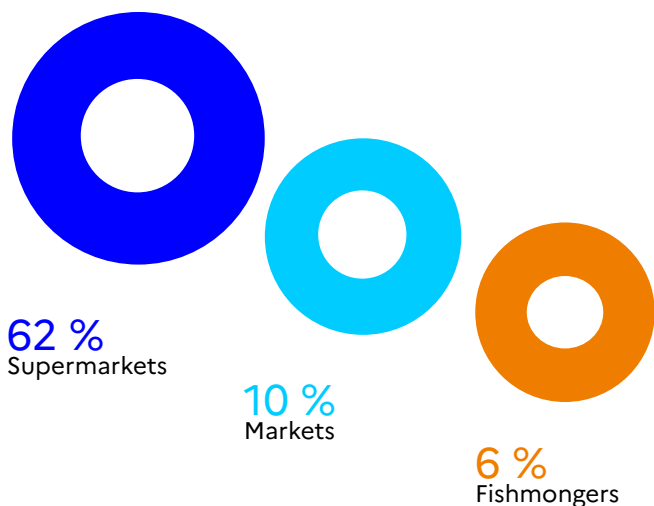
(1) Data collection methodology is detailed on inside back cover
 (2) A purchasing households buys the product at least once a year
 (3) With bar code

Source : FranceAgriMer from Kantar Worldpanel

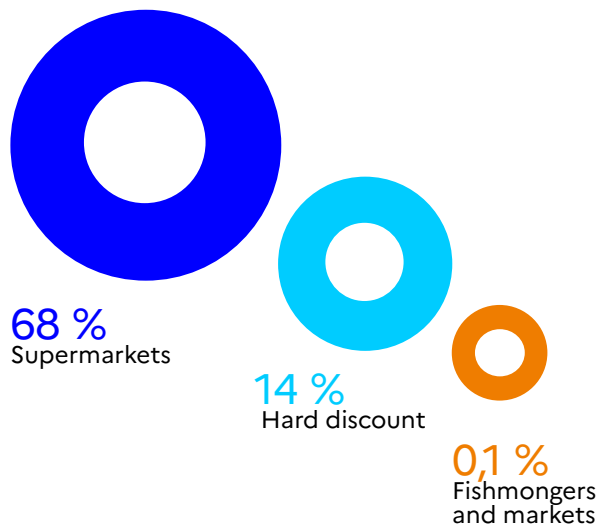
• Households purchases

Purchases of aquatic products by french households for home consumption in 2022 ⁽¹⁾

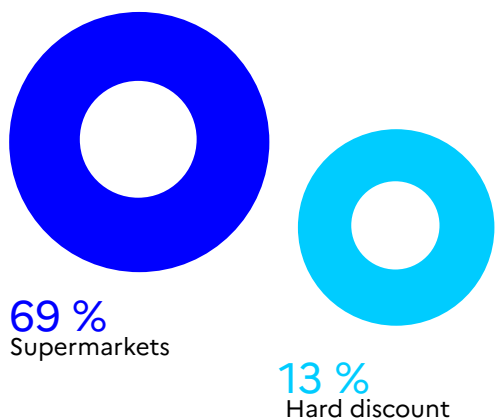
Fresh products



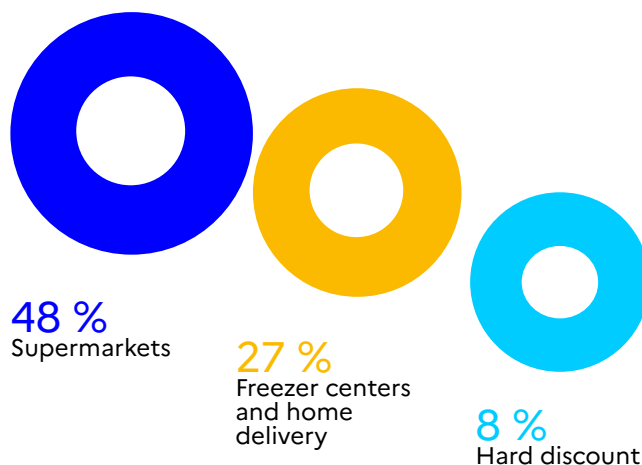
Chilled delicatessen



Canned products



Frozen products



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

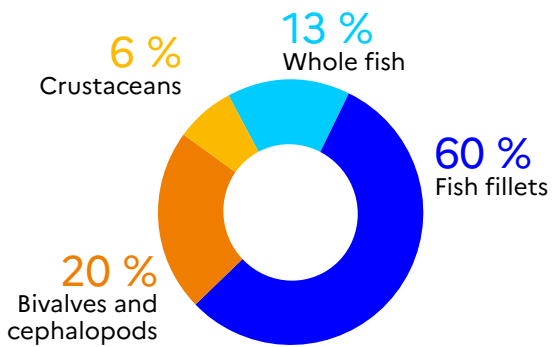
Source : FranceAgriMer from Kantar Worldpanel

Households purchases

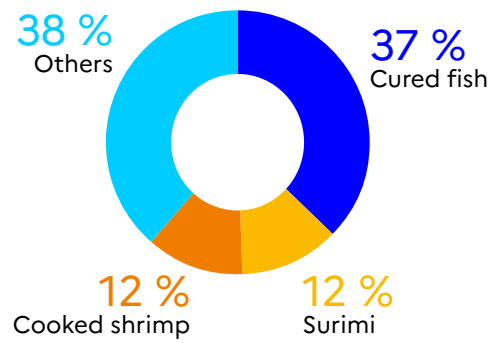


Breakdown of expenditures by presentation and species group in 2021 ⁽¹⁾

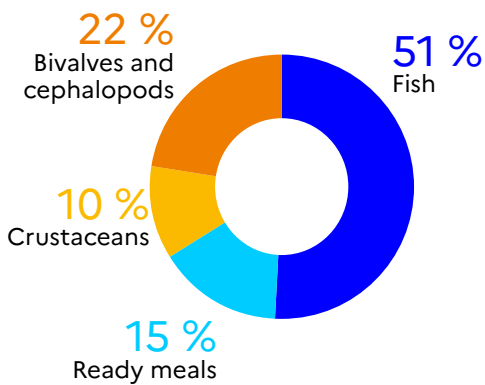
Fresh products



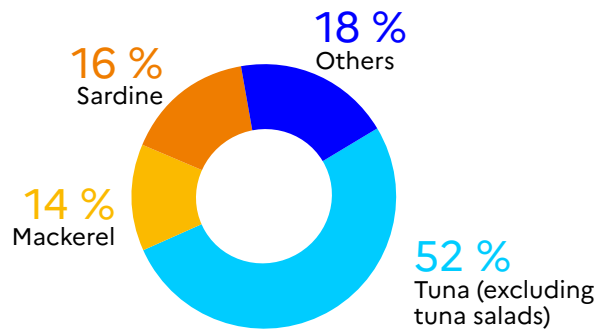
Chilled delicatessen



Frozen products



Canned products



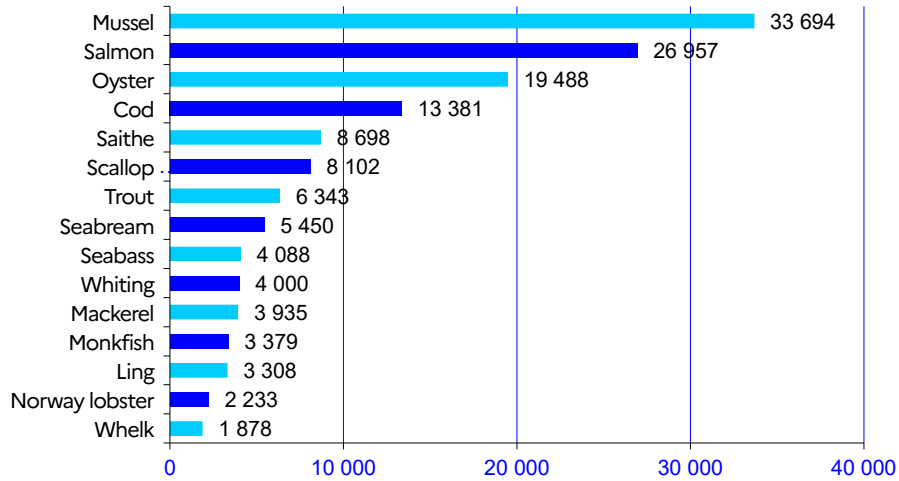
(1) Data collection methodology is detailed on inside back cover

Source : FranceAgriMer from Kantar Worldpanel

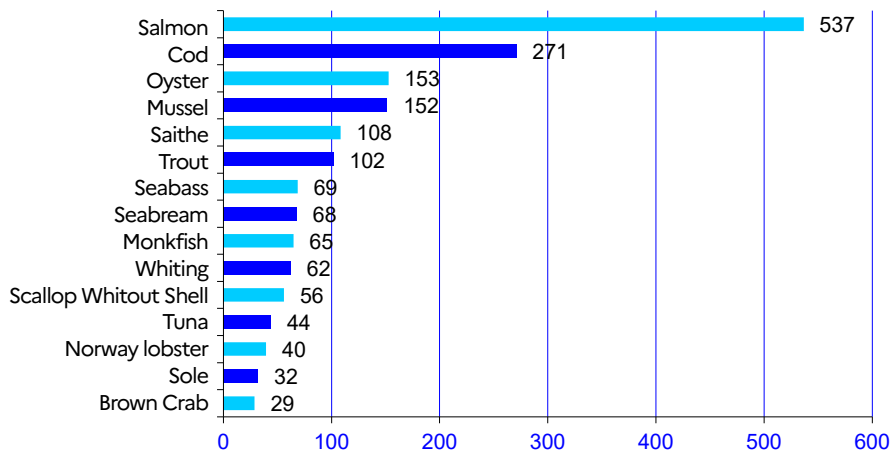
Households purchases

Main species purchased fresh in 2022 ⁽¹⁾

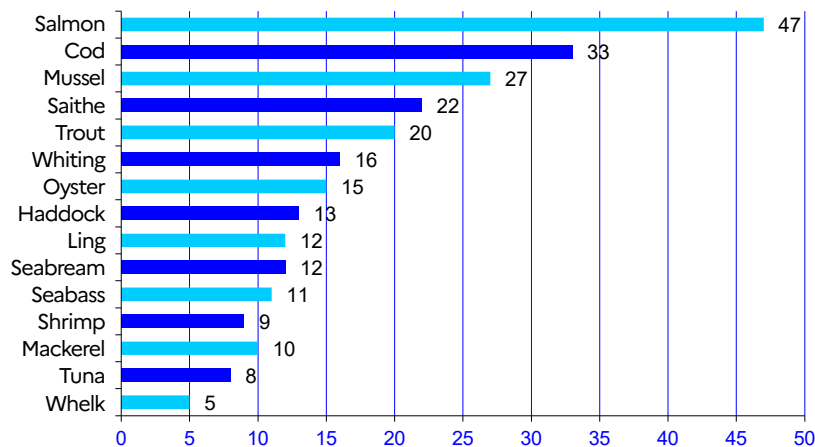
Tons ⁽²⁾



Million euros



Percentage of purchasing households (%)



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

(2) Net weight

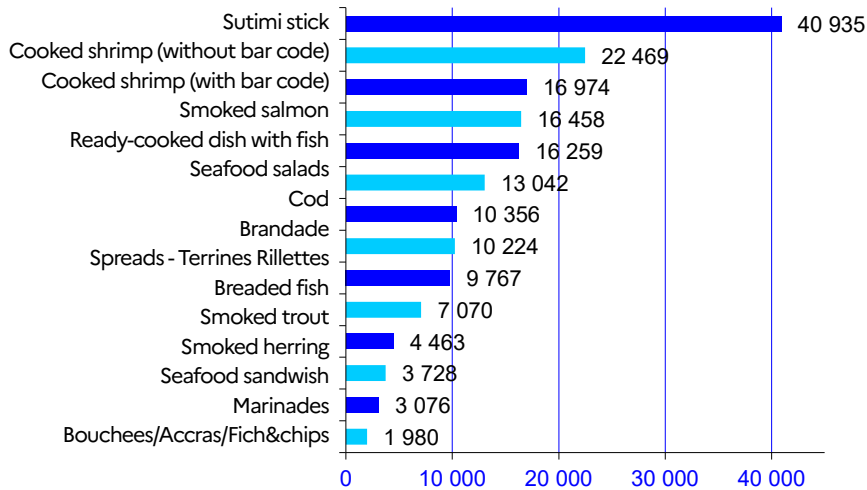
Source : FranceAgriMer from Kantar Worldpanel

Households purchases

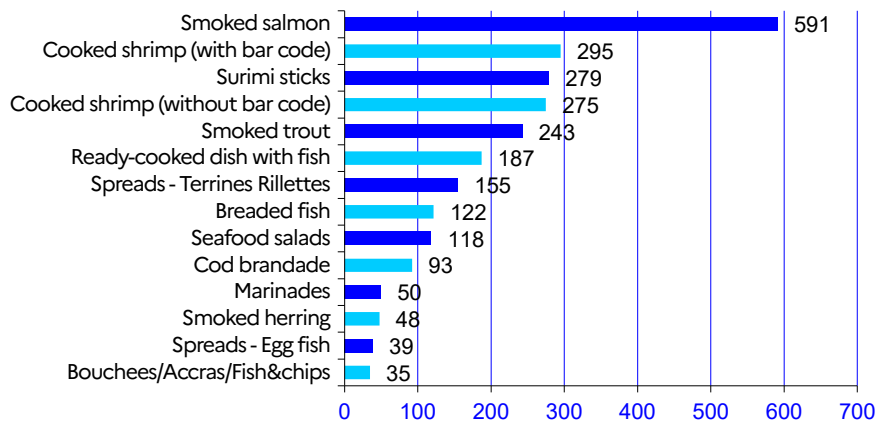


Main products purchased for chilled delicatessen in 2022 ⁽¹⁾

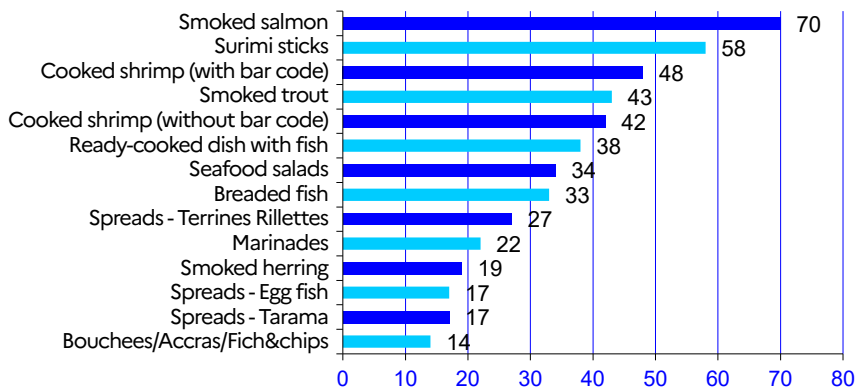
Tons ⁽²⁾



Million euros



Percentage of purchasing households (%)



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

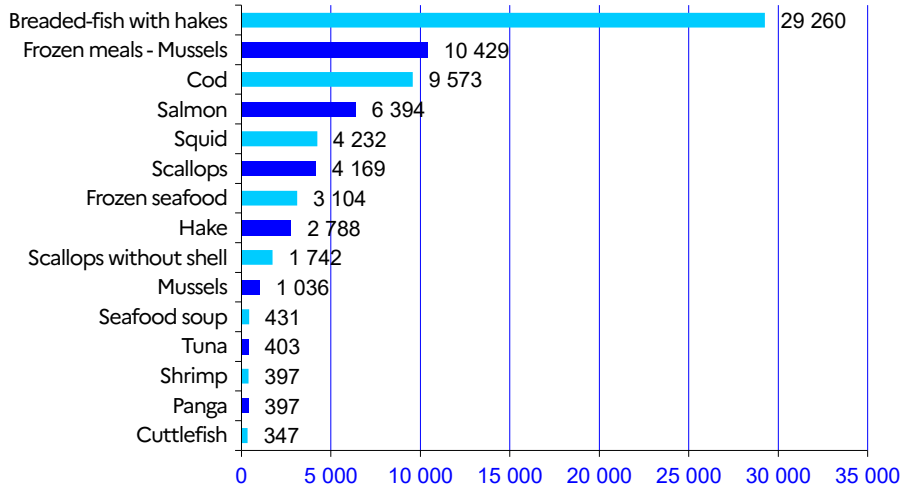
(2) Net weight

Source : FranceAgriMer from Kantar Worldpanel

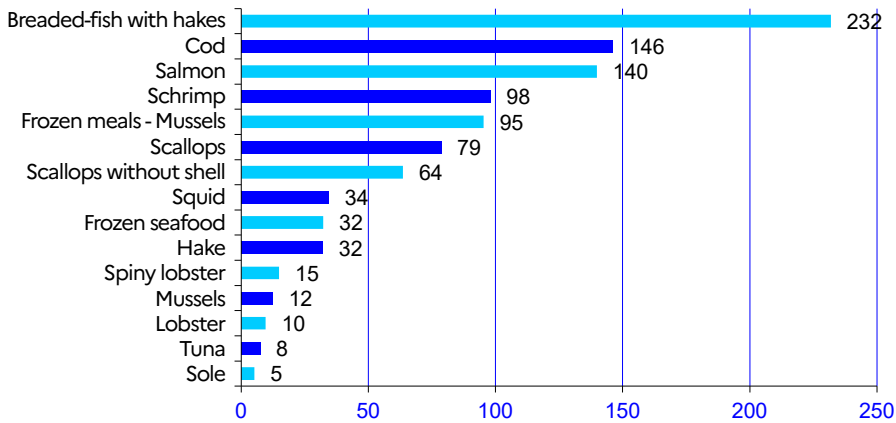
Households purchases

Main species purchased as frozen products in 2022 ⁽¹⁾

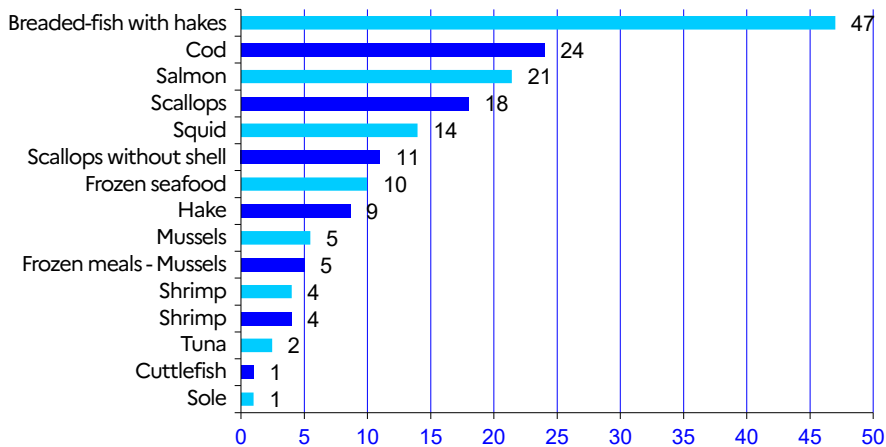
Tons ⁽²⁾



Million euros



Percentage of purchasing households (%)



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

(2) Net weight

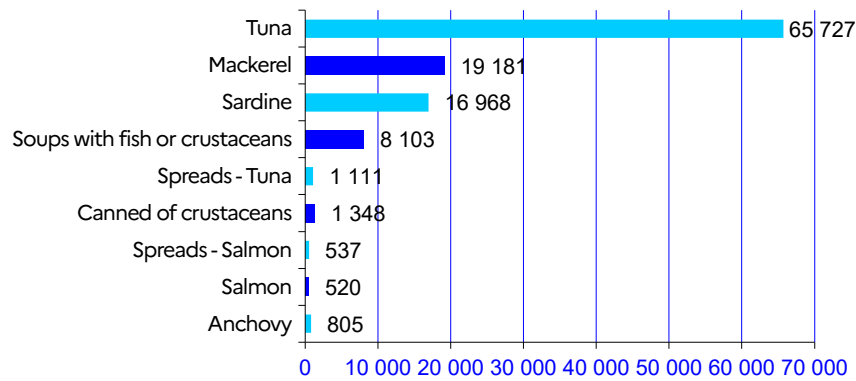
Source : FranceAgriMer from Kantar Worldpanel

Households purchases

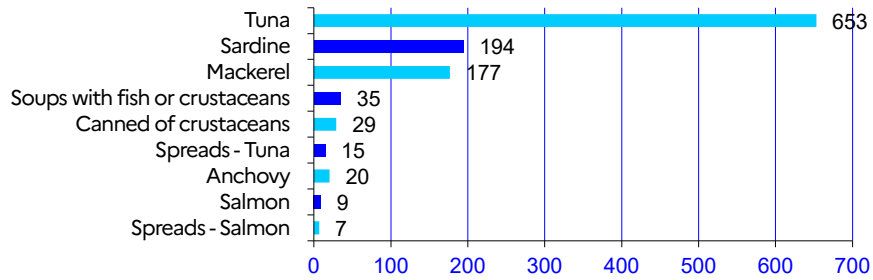


Main species purchased in canned products in 2021 ⁽¹⁾

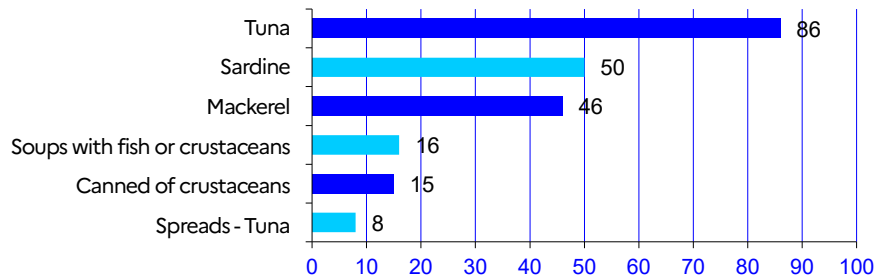
Tons ⁽²⁾



Million euros



Percentage of purchasing households (%)



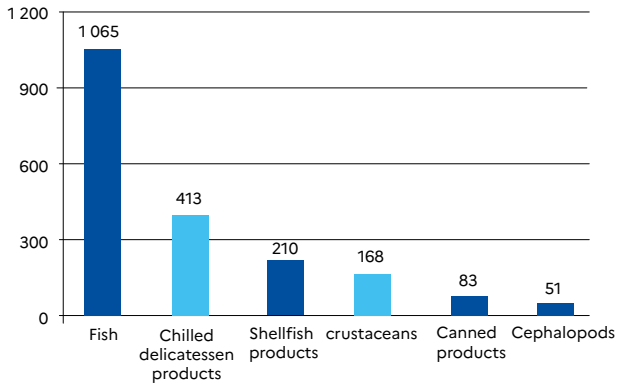
(1) Data collection methodology is detailed on inside back cover
 (2) Net weight

Source : FranceAgriMer from Kantar Worldpanel

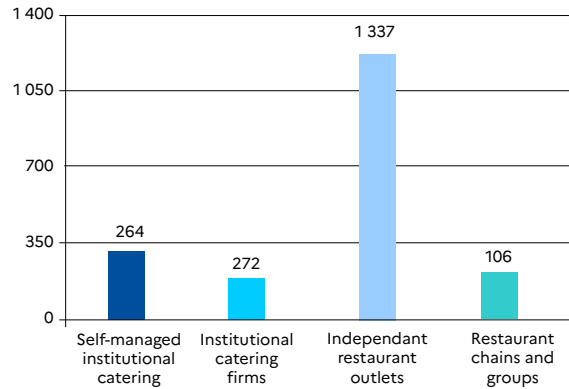
- **Catering purchases**

Spendings for the catering sector in 2019

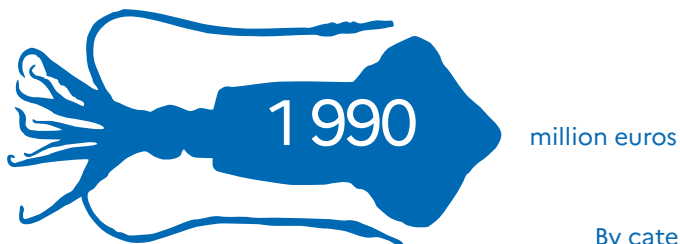
By kind of product (million euros)



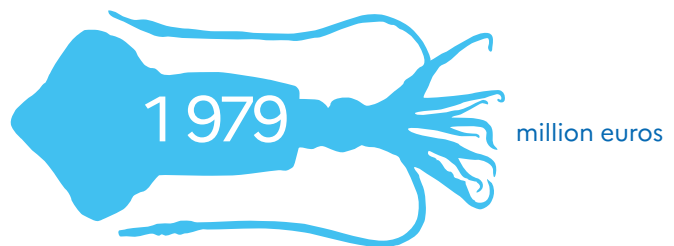
By catering outlet (million euros)



By kind of product



By catering outlet



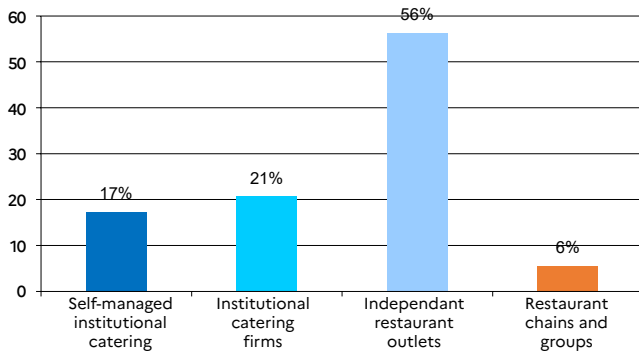
Source: FranceAgriMer from Circana (now from IRI)

• Catering purchases

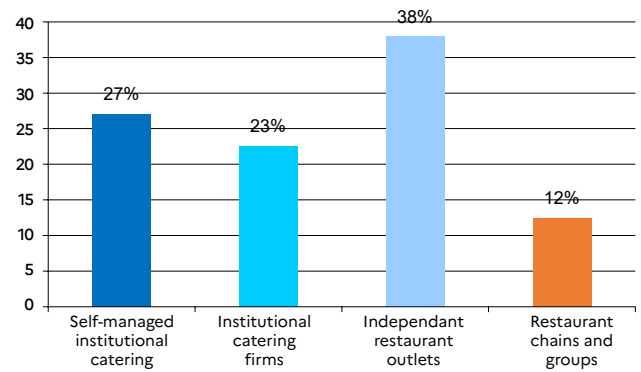


Purchases in volume by kind of products in 2019

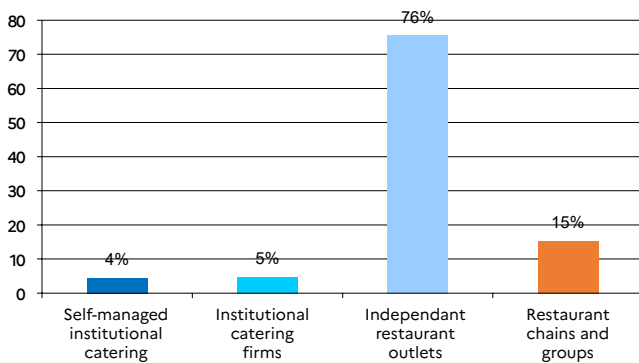
Fish products (%)



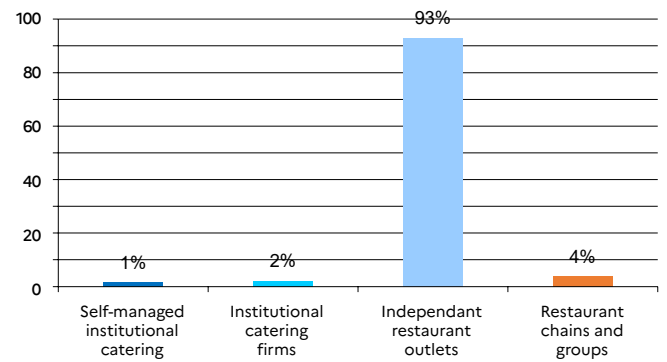
Chilled delicatessen products (%)



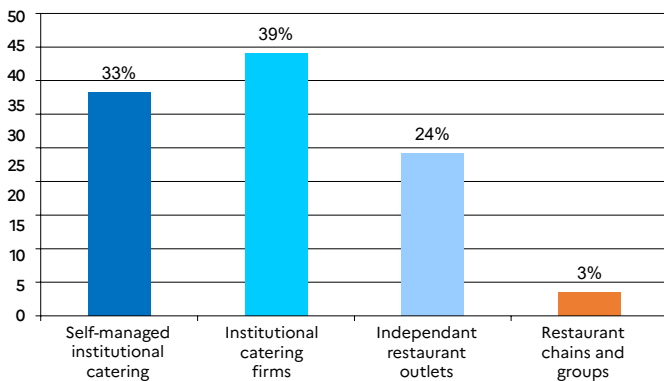
Shellfish products (%)



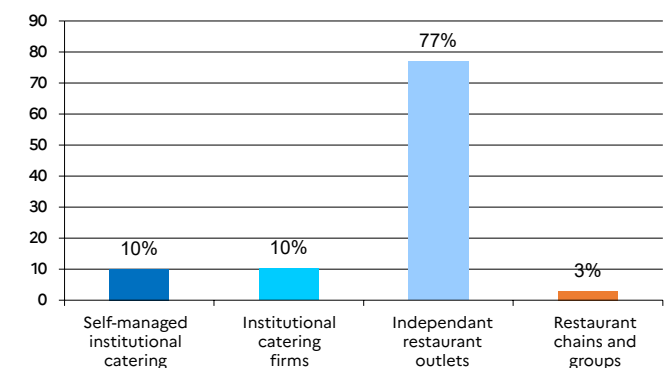
Crustaceans (%)



Canned products (%)



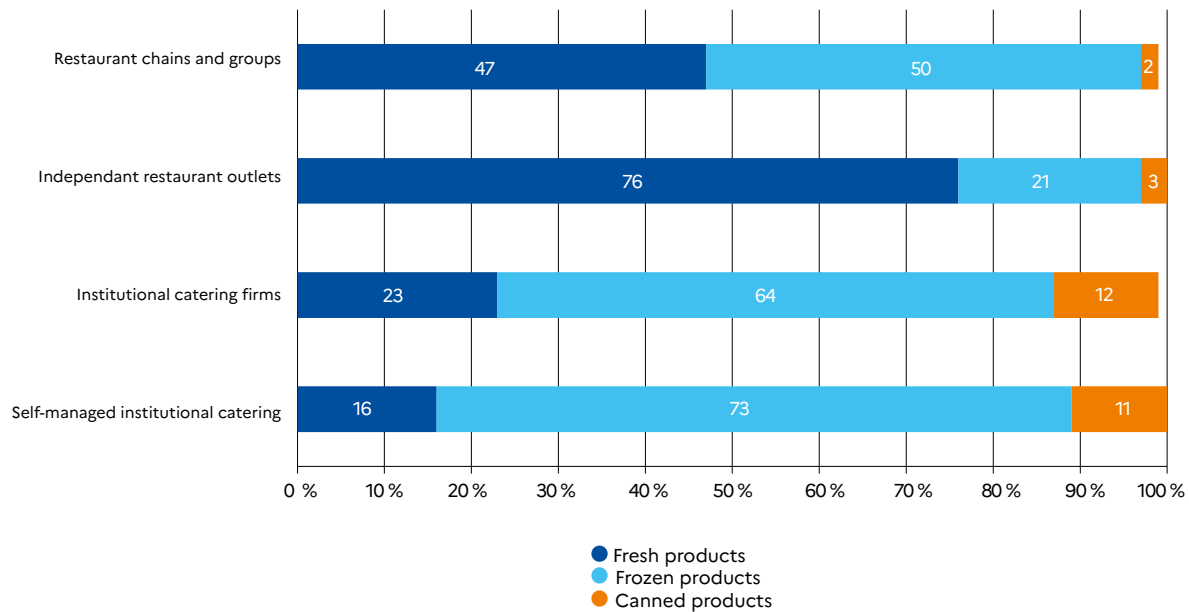
Cephalopods (%)



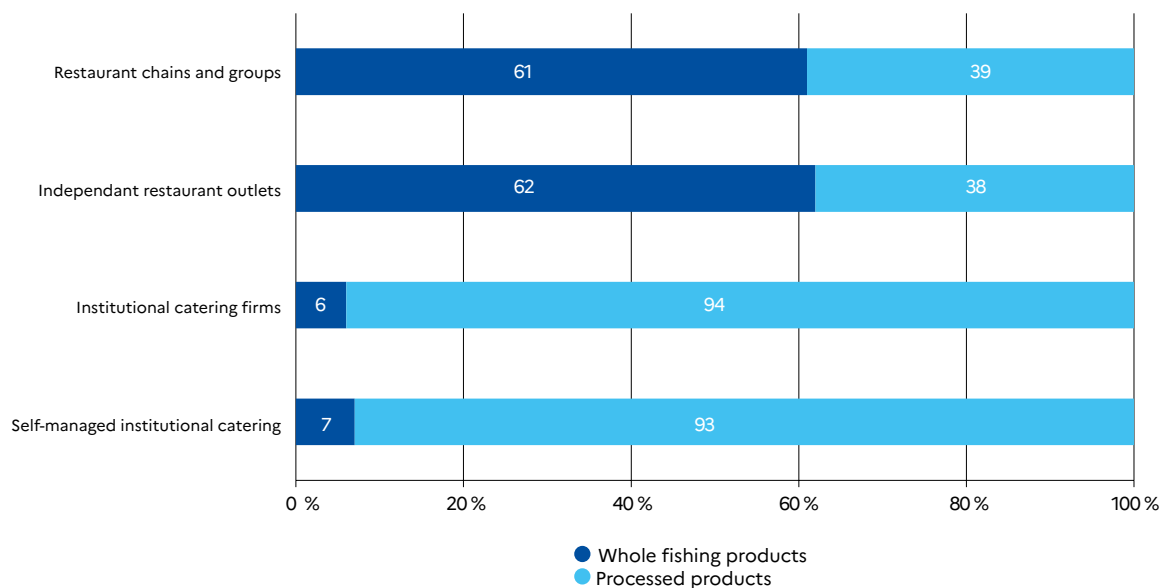
Source: FranceAgriMer from Circana (now from IRI)

• 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)⁽¹⁾



(1) Including hard discount, freezer centres and home delivery

(2) Including direct sales

(3) Net weight

Source: FranceAgriMer from Circana (now from IRI)

DATA COLLECTION METHODOLOGY

Data Included data are the last available

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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