The fisheries and aquaculture sector in France
SUMMARY

Production page 3
- France in the EU-28 & in the world in 2016
- Total sales of fisheries and aquaculture products
- Sales of fisheries products at auction
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- Fishing fleet
- Aquaculture firms
- Jobs

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PRODUCTION
fishing fleet / aquaculture firms / jobs
total sales of fisheries and aquaculture products
Quantities sold in 2016 (1)
by method of production (million tons) (2)

- total: 698 million tons
- 41 fish farming (4)
- 192 shellfish farming
- fresh and frozen landings (3)
- 465

Value of sales in 2016 (2)
by method of production (million euros)

- total: 2,714 million euros
- 168 fish farming (4)
- 657 shellfish farming
- fresh and frozen landings (3)
- 1,889

(1) excluding seaweeds - (2) equivalent live weight - (3) total sales to processing industry and export sales - (4) including farmed crustaceans
Source: MAA/CPMA/Eumofa

France in the EU-28 and in the world in 2016

Catches EU: 4.9%
Aquaculture EU: 1.2%

Including China 46%
Non member countries:
170,900 / 96%

UE 645 1.4%

Spain 1,146 18%
United Kingdom 894 14%
France 698 11%
Denmark 705 11%

Source: FAO

Source: Eumofa

Spain 1,146
18%

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14%

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11%

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11%

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Source: FAO

Source: Eumofa

Spain 1,146
18%

United Kingdom 894
14%

France 698
11%

Denmark 705
11%
Changes in quantities sold in metropolitan France\(^{(1)}\)

\(^{(1)}\) excluding seaweeds - \(^{(2)}\) equivalent live weight - \(^{(3)}\) sales, sales to processing industry and export sales

Source: MEEM / CGDD / SOeS

Main species sold in 2016\(^{(2)}\)(\(^{(3)}\))

\(^{(2)}\) fresh and frozen landings
\(^{(3)}\) shellfish farming
\(^{(3)}\) fish farming

Key figures FranceAgriMer 2019 / The fisheries and aquaculture /5
Fresh and frozen landings in 2018

Sales

value (million euros) / quantity (tons)

(1) excluding seaweeds and freshwater fishing - (2) equivalent live weight - (3) Sales without auction - VISIOMer

Source: VISIOMer/FranceAgriMer
Sales of fishery products at auction in 2018

Number of auctions: 37

Sales by French vessels
quantities sold 189 196 tons
value of sales 640 million euros

Sales by foreign-registered vessels
quantities sold 5 106 tons
value of sales 17 million euros

Source: VISIOmer / FranceAgriMer
Quantities sold and value of sales by French vessels at the main auctions in 2018

Production / sales at auction

Le Guilvinec
Lorient
Boulogne
Les Sables d’Olonne
Erquy
St-Quay-Portrieux
St-Jean-de-Luz
Oléron
Port-en-Bessin
Roscoff
La Turballe
Granville
Concarneau
Le Croisic
St-Guenolé
Cherbourg
Noirmoutier
Arcachon
Le Grau-du-roi
Loctudy
Dieppe
Sète
Brest
Fécamp
Royan
La Rochelle
St-Gilles-Croix-de-Vie
Audienc
Dinan
Quiberon
Douarnenez
Port-la-Nouvelle
Dunkerque
Agde
St-Malo
Ile-d’Yeu
Cancale

Source: VISIOmer/ FranceAgriMer
Sales of fishery products

Breakdown of quantities sold and value of sales at auction in 2018 by fleet segment \(^{(1)(2)(3)}\)

\[\text{[Diagram showing quantities sold and value of sales at auction]}\]

Number of vessels (sales at auction in 2018) \(^{(1)(2)(3)}\)

\[\begin{align*}
\text{trawl and other gear} & \quad 437 \\
\text{trawl exclusively} & \quad 403 \\
\text{net exclusively} & \quad 320 \\
\text{dredge} & \quad 259 \\
\text{net and pot and trap} & \quad 253 \\
\text{pot and trap exclusively} & \quad 220 \\
\text{hook exclusively} & \quad 178 \\
\text{glass eel gear} & \quad 130 \\
\text{pot and trap, hook} & \quad 108 \\
\text{net and hook} & \quad 98 \\
\text{miscellaneous coastal gear} & \quad 80 \\
\text{seiners} & \quad 63 \\
\text{total} & \quad 2,549
\end{align*}\]

\(^{(1)}\) breakdown by fleet segment based on main gear used by vessels according to the 2017 Ifremer SIH survey - \(^{(2)}\) excluding Mediterranean sea - \(^{(3)}\) unspecified and inactives are not considered

Sources: FranceAgriMer, Ifremer
Sales of fishery products

Main species sold at auction by French vessels in 2018

Quantities sold (tons)

Value of sales (1 000 euros)

Changes in quantities sold by the French vessels by species group

(1 000 tons)

Source: VISIO/Mer, FranceAgriMer

Changes in value of sales by the French vessels by species group

(million euros)

Source: VISIO/Mer, FranceAgriMer
Sales of aquaculture products in metropolitan France

Shellfish farming 2016

Quantities sold for consumption (tons)\(^{(1)}\)

<table>
<thead>
<tr>
<th>Species</th>
<th>Quantities sold (tons)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mussel</td>
<td>55,200</td>
</tr>
<tr>
<td>Oyster</td>
<td>118,900</td>
</tr>
<tr>
<td>Other bivalves</td>
<td>17,700</td>
</tr>
<tr>
<td><strong>Total sales</strong></td>
<td><strong>191,800</strong></td>
</tr>
</tbody>
</table>

Value of sales (million euros)

<table>
<thead>
<tr>
<th>Species</th>
<th>Value of sales (million euros)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mussel</td>
<td>149</td>
</tr>
<tr>
<td>Oyster</td>
<td>486</td>
</tr>
<tr>
<td>Other bivalves</td>
<td>22</td>
</tr>
<tr>
<td><strong>Total sales</strong></td>
<td><strong>657</strong></td>
</tr>
</tbody>
</table>

Fish farming 2016

Quantities sold (tons)\(^{(2)}\)

<table>
<thead>
<tr>
<th>Species</th>
<th>Quantities sold (tons)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seabass, seabream and other marine fish</td>
<td>4,830</td>
</tr>
<tr>
<td>Carp and other freshwater fish</td>
<td>8,000</td>
</tr>
<tr>
<td>Trout and salmon</td>
<td>27,900</td>
</tr>
<tr>
<td><strong>Total sales</strong></td>
<td><strong>40,730</strong></td>
</tr>
</tbody>
</table>

Value of sales (million euros)

<table>
<thead>
<tr>
<th>Species</th>
<th>Value of sales (million euros)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seabass, seabream and other marine fish</td>
<td>141</td>
</tr>
<tr>
<td>Carp and other freshwater fish</td>
<td>113</td>
</tr>
<tr>
<td>Trout and salmon</td>
<td>113</td>
</tr>
<tr>
<td><strong>Total sales</strong></td>
<td><strong>407</strong></td>
</tr>
</tbody>
</table>

\(^{(1)}\) equivalent live weight - \(^{(2)}\) including farmed crustaceans

Source: Aquaculture survey 2016- LEMNA for DCP (EU) + DPMA data from 2015
Fishing fleet

Breakdown of total vessels by length in 2017 (metropolitan France)

- less than 10 meters: 3,562 vessels
- from 10 to < 12 meters: 676 vessels
- from 12 to < 24 meters: 149 vessels
- from 24 to < 40 meters: 36 vessels
- more than 40 meters: 0 vessels

Breakdown of total vessels by fishery category in 2014 (metropolitan France)

- 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

Total France 7,855 vessels

Small scale fisheries: 4,417 vessels
Coastal fisheries: 3,438 vessels
Offshore fisheries: 28 vessels
High seas fisheries: 17 vessels

Metropolitan France: 4,417 vessels
Overseas territories: 3,438 vessels

Source: IFREMER 2017 + study on overseas territories

(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.
Aquaculture firms

- Shellfish farming - including seaweed and shrimps: 2,432
- Marine fish farming and sturgeon: 35
- Continental salmonids farming: 268

Source: aquaculture survey from 2016 - LEMNA for DCF (EU) + DPMA data from 2015

Changes in the number of fishing vessels in metropolitan France

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

Source: IFREMER 2017
Jobs
Number of seamen employed on board French fishing vessels in 2016 (seamen of all nationalities)

Total France 13,536

Regional sharing

Number of full time equivalent jobs in 2016 (1)

<table>
<thead>
<tr>
<th>Activity</th>
<th>Jobs</th>
<th>FTEJ</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shellfish farming</td>
<td>13,841</td>
<td>7,892</td>
</tr>
<tr>
<td>Marine fish farming and sturgeon (2)</td>
<td>521</td>
<td>468</td>
</tr>
<tr>
<td>Continental salmonids farming</td>
<td>1,223</td>
<td>945</td>
</tr>
</tbody>
</table>

(1) including seasonal jobs - (2) Data from 2014
Source: DPMA - Data Collection Framework (DCF)
Fishmongers in 2016

- **Number of establishments**: 4,457
- **Net sales**: 1,060 million euros
- **Full time equivalent jobs**: 9,702

### Regional Distribution

- **Île-de-France**: 736
- **Nouvelle-Aquitaine**: 654
- **Occitanie**: 541
- **Provence-Alpes-Côte d’Azur**: 495
- **Bretagne**: 434
- **Bourgogne-Franche-Comté**: 75
- **Auvergne-Rhône-Alpes**: 248
- **Hauts-de-France**: 307
- **Normandie**: 390
- **Grand Est**: 89
- **Pays-de-la-Loire**: 176
- **Île-de-France**: 736
- **Corse**: 30

Source: Via.Aqua pour FranceAgriMer
Trading firms in 2016

number of firms
278

jobs (1)
5,945

net sales (1)
2,384 million euros

Breakdown of firms and total net sales by region

<table>
<thead>
<tr>
<th>Region</th>
<th>% of total firms</th>
<th>% of total net sales</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hauts-de-France</td>
<td>12% / 14% / 18%</td>
<td></td>
</tr>
<tr>
<td>Normandy</td>
<td>17% / 11% / 7%</td>
<td></td>
</tr>
<tr>
<td>Brittany</td>
<td>34% / 34% / 28%</td>
<td></td>
</tr>
<tr>
<td>Atlantique</td>
<td>19% / 21% / 20%</td>
<td></td>
</tr>
<tr>
<td>Méditerranée</td>
<td>12% / 7% / 8%</td>
<td></td>
</tr>
<tr>
<td>Others regions</td>
<td>6% / 13% / 20%</td>
<td></td>
</tr>
</tbody>
</table>

Others regions including overseas territories

(1) data 2014 or 2015

Source: FranceAgriMer

Key figures: FranceAgriMer 2019 / The fisheries and aquaculture / 17
**Processing main activity firms in 2017**

Number of firms: 1,996

Net sales per firm: 4,782 million euros

Jobs: 13,996

Net sales for processing including seafood and fish farming processing: 4,267 million euros

**Seafood processing net sales**

- Cooked meals and fish sticks: 18%
- Salted, smoked and dried products: 32%
- Fresh, frozen and whole products: 16%
- Canned products (not including cooked meals): 32%
- Co-products: 1.2%
- Liquid products, including soups: 0.7%
- Other products: 0.03%

**Breakdown of firms by total net sales**

- < 5 M€: 14%
- 5 M€ and 15 M€: 40%
- 15 M€ and 50 M€: 21%
- 50 M€ and 200 M€: 20%
- 200 M€ and 500 M€: 23%
- > 500 M€: 4%

**Breakdown of processing firms and sales by region**

- Hauts-de-France region: 18% / 15%
- Brittany: 24% / 28%
- Normandy: 5% / 6%
- Atlantic coastline: 18% / 17%
- Mediterranean Sea: 10% / 6%
- From other regions including overseas territories: 26% / 29%

---

(1) filleting, cutting, peeling, packaging, surgelation
(2) seaweeds, in fish products, others
(3) small sample estimation

Source: FranceAgriMer / processing firms survey
Supply balance in 2018

Net weight (1000 tons)

- Imports: 1166
- Exports: 354

Live weight (1000 tons)

- Imports: 2097
- Exports: 606

Value (million euros)

- Exports: 1669
- Imports: -5981
- Balance: -4312

Source: French customs
**Imports - main species in 2018**

Value (million euros)

<table>
<thead>
<tr>
<th>Species</th>
<th>Value (million euros)</th>
</tr>
</thead>
<tbody>
<tr>
<td>salmon</td>
<td>622</td>
</tr>
<tr>
<td>shrimp</td>
<td>450</td>
</tr>
<tr>
<td>tuna</td>
<td>250</td>
</tr>
<tr>
<td>cod</td>
<td>175</td>
</tr>
<tr>
<td>saithe, pollack</td>
<td>175</td>
</tr>
<tr>
<td>scallop</td>
<td>96</td>
</tr>
<tr>
<td>crabs</td>
<td>81</td>
</tr>
<tr>
<td>mussels</td>
<td>75</td>
</tr>
<tr>
<td>lobster</td>
<td>75</td>
</tr>
<tr>
<td>sardine</td>
<td>66</td>
</tr>
<tr>
<td>mackerel</td>
<td>66</td>
</tr>
<tr>
<td>lobster</td>
<td>62</td>
</tr>
<tr>
<td>Norway lobster</td>
<td>61</td>
</tr>
<tr>
<td>hake</td>
<td>60</td>
</tr>
<tr>
<td>seabream</td>
<td>57</td>
</tr>
</tbody>
</table>

Source: French customs

**Exports - main species in 2018**

Value (million euros)

<table>
<thead>
<tr>
<th>Species</th>
<th>Value (million euros)</th>
</tr>
</thead>
<tbody>
<tr>
<td>tuna</td>
<td>216</td>
</tr>
<tr>
<td>salmon</td>
<td>193</td>
</tr>
<tr>
<td>shrimp</td>
<td>95</td>
</tr>
<tr>
<td>oyster</td>
<td>95</td>
</tr>
<tr>
<td>cuttlefish</td>
<td>56</td>
</tr>
<tr>
<td>saithe, pollack</td>
<td>51</td>
</tr>
<tr>
<td>squid</td>
<td>35</td>
</tr>
<tr>
<td>trout</td>
<td>35</td>
</tr>
<tr>
<td>cod</td>
<td>30</td>
</tr>
<tr>
<td>scallop</td>
<td>30</td>
</tr>
<tr>
<td>crabs</td>
<td>26</td>
</tr>
<tr>
<td>monkfish</td>
<td>23</td>
</tr>
<tr>
<td>hake</td>
<td>22</td>
</tr>
<tr>
<td>eel, glass eel</td>
<td>21</td>
</tr>
<tr>
<td>lobster</td>
<td>21</td>
</tr>
</tbody>
</table>

Source: French customs
Imports by presentation in 2018

Imports by volume (1,000 tons)

- Frozen: 912
- Live, fresh, chilled: 429
- Canned: 496
- Salted, dried, smoked: 383
- Non food use: 428

Imports by value (million euros)

- Frozen: 2,254
- Live, fresh, chilled: 2,240
- Canned: 1,016
- Salted, dried, smoked: 299
- Non food use: 171

Imports by species group in 2018

Imports by volume (1,000 tons)

- Marine fish: 1,218
- Crustaceans: 173
- Trout, salmon, eel and fresh water fish: 227
- Bivalves and cephalopods: 1271
- Non food use: 178

Imports by value (million euros)

- Marine fish: 2,640
- Crustaceans: 1,146
- Trout, salmon, eel and fresh water fish: 1,399
- Bivalves and cephalopods: 568
- Non food use: 171

(1) Data collection methodology is detailed on inside back cover.
Source: French customs
Exports by presentation in 2018

Exports by volume (1,000 tons)

Exports by value (million euros)

Exports by species group in 2018

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 of aquatic products by geographical origin in 2018

Value (million euros)

Exports of aquatic products by destination in 2018

Value (million euros)

Source: French Customs
Balance changes in production, imports and exports⁽¹⁾⁽²⁾⁽³⁾

Supply balance in 2016⁽¹⁾⁽²⁾⁽³⁾

⁽¹⁾ data collection methodology is detailed on inside back cover - (2) live weight - (3) excluding non food use - (4) estimates for 2014 and 2015

Source: FranceAgriMer
**Changes in supply balance**

(1) (2)

**Breakdown by products in 2015**

(1) (2)

<table>
<thead>
<tr>
<th>Product</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Farmed shellfish</td>
<td>21%</td>
</tr>
<tr>
<td>Shellfish from catches</td>
<td>10%</td>
</tr>
<tr>
<td>Farmed finfish</td>
<td>11%</td>
</tr>
<tr>
<td>Fish from catches</td>
<td>58%</td>
</tr>
</tbody>
</table>

Average annual consumption per capita (2) (3) (kg) 34

<table>
<thead>
<tr>
<th>Type</th>
<th>Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fish farming</td>
<td>4</td>
</tr>
<tr>
<td>Salmon</td>
<td>3</td>
</tr>
<tr>
<td>Mussel</td>
<td>7</td>
</tr>
<tr>
<td>Oyster</td>
<td>1</td>
</tr>
<tr>
<td>Scallop</td>
<td>1</td>
</tr>
<tr>
<td>Shrimp</td>
<td>1</td>
</tr>
<tr>
<td>Tuna</td>
<td>20</td>
</tr>
<tr>
<td>Cod</td>
<td>2,70</td>
</tr>
<tr>
<td>Alaska pollock</td>
<td>2,20</td>
</tr>
<tr>
<td>Scallop</td>
<td>1,29</td>
</tr>
<tr>
<td>Sardine</td>
<td>1</td>
</tr>
<tr>
<td>Hake</td>
<td>1</td>
</tr>
<tr>
<td>Herring</td>
<td>0,75</td>
</tr>
<tr>
<td>Mackerel</td>
<td>0,74</td>
</tr>
<tr>
<td>Saithe</td>
<td>0,67</td>
</tr>
<tr>
<td>Monkfish</td>
<td>0,40</td>
</tr>
</tbody>
</table>

**Average annual consumption per capita (2) (3)**

34 kg
Percentage of purchasing households in 2018 (2)

- Fresh products: 95%
- Chilled delicatessen: 94%
- Canned products: 83%
- Frozen products: 81%

Consommation des ménages sur 10 ans

<table>
<thead>
<tr>
<th>Product</th>
<th>2009</th>
<th>2018</th>
<th>Evolution</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Total quantities (1 000 tons)</td>
<td>Spendings (1 000 €)</td>
<td>Total quantities (1 000 tons)</td>
</tr>
<tr>
<td>Fresh products</td>
<td>259 158</td>
<td>2 339 637</td>
<td>239 908</td>
</tr>
<tr>
<td>Frozen products</td>
<td>149 560</td>
<td>1 369 744</td>
<td>118 406</td>
</tr>
<tr>
<td>Canned products</td>
<td>109 816</td>
<td>915 354</td>
<td>124 912</td>
</tr>
<tr>
<td>Chilled delicatessen</td>
<td>162 066</td>
<td>1 878 324</td>
<td>186 970</td>
</tr>
</tbody>
</table>

(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
Consumption of aquatic products by presentation for home consumption in 2018\(^{(1)}\)

**Fresh products**
- 68% supermarkets
- 11% markets
- 9% fishmongers

**Chilled delicatessen**
- 75% supermarkets
- 11% hard discount
- 3% fishmongers and markets

**Canned products**
- 74% supermarkets
- 12% hard discount

**Frozen products**
- 50% supermarkets
- 29% freezer centers and home delivery
- 11% hard discount

\(^{(1)}\) data collection methodology is detailed on inside back cover

Source: FranceAgriMer from Kantar Worldpanel
Breakdown of expenditures by presentation and species groups in 2018 (1)

Fresh products

- Crustaceans: 6%
- Whole fish: 14%
- Bivalves and cephalopods: 22%
- Cooked shrimp: 54%
- Fish fillets: 54%

Chilled delicatessen

- Surimi: 10%
- Cured fish: 33%
- Cooked shrimp: 18%
- Others: 39%

Frozen products

- Ready meals: 22%
- Crustaceans: 11%
- Fish: 50%
- Bivalves and cephalopods: 15%

Canned products

- Sardine: 16%
- Mackerel: 15%
- Tuna salads: 3%
- Others: 18%
- Tuna (excluding tuna salads): 48%

(1) Data collection methodology is detailed on inside back cover
Source: FranceAgriMer from Kantar Worldpanel
Main species purchased fresh in 2018 (1)

**Tons (2)**

- Mussel: 38,921 tons
- Oyster: 24,144 tons
- Salmon: 22,556 tons
- Cod: 21,797 tons
- Saithe: 15,370 tons
- Scallop: 7,267 tons
- Seabream: 5,328 tons
- Trout: 5,328 tons
- Monkfish: 4,465 tons
- Whelk: 4,223 tons
- Mackerel: 4,098 tons
- Whiting: 3,728 tons
- Sardine: 3,682 tons
- Hake: 3,653 tons
- Seabass: 3,624 tons

**Million euros**

- Salmon: 330 million euros
- Cod: 177 million euros
- Oyster: 151 million euros
- Mussel: 97 million euros
- Saithe: 75 million euros
- Monkfish: 74 million euros
- Trout: 63 million euros
- Seabream: 52 million euros
- Seabass: 50 million euros
- Whiting: 48 million euros
- Scallop without shell: 42 million euros
- Scallop: 40 million euros
- Norway lobster: 39 million euros
- Sole: 38 million euros
- Hake: 36 million euros

**Percentage of purchasing households (%)**

- Salmon: 43%
- Cod: 38%
- Mussel: 33%
- Saithe: 23%
- Trout: 22%
- Monkfish: 20%
- Oyster: 18%
- Whelk: 18%
- Ling: 17%
- Whiting: 16%
- Seabream: 15%
- Haddock: 14%
- Seabass: 13%
- Mackerel: 11%
- Sardine: 10%
- Haddock: 10%
- Monkfish: 9%

(1) Data collection methodology is detailed on inside back cover
(2) Net weight
Source: FranceAgriMer from Kantar Worldpanel
Mains species purchased in chilled delicatessen in 2018

**Tons**
- Surimi stick: 37,675
- Shrimp/cooked king prawns (without bar code): 1,053
- Smoked salmon: 1,983
- Ready meals with fish: 11,500
- Seafood salad: 1,83
- Shrimp/cooked king prawns (with bar code): 5,005
- Starters & cooked meals-salt cod and potato mash: 6,183
- Precooked fish-breaded fish: 4,949
- Smoked trout: 4,949
- Smoked herring: 3,349
- Spreads-terrines rillettes: 3,220
- Marinades: 3,220
- Sushi/sashimi/maki: 3,220
- Seafood soup: 2,809
- Bites/fish balls/fritters: 2,498

**Million euros**
- Smoked salmon: 554
- Shrimp/cooked king prawns (without bar code): 27,675
- Surimi stick: 20,000
- Smoked salmon: 16,922
- Ready meals with fish: 10,212
- Seafood salad: 15,105
- Shrimp/cooked king prawns (with bar code): 5,005
- Starters & cooked meals-salt cod and potato mash: 6,183
- Precooked fish-breaded fish: 4,949
- Smoked trout: 4,949
- Smoked herring: 3,349
- Spreads-terrines rillettes: 3,220
- Marinades: 3,220
- Sushi/sashimi/maki: 3,220
- Seafood soup: 2,809
- Bites/fish balls/fritters: 2,498

**Percentage of purchasing households (in %)**
- Smoked salmon: 57
- Surimi stick: 55
- Starters and ready meals: 54
- Shrimp/cooked king prawns (without bar code): 45
- Shrimp/cooked king prawns (with bar code): 45
- Smoked trout: 37
- Precooked fish: 37
- Ready meals with fish: 36
- Seafood salad: 36
- Spreads-terrines rillettes: 26
- Precooked fish-breaded fish: 25
- Marinades: 22

Source: FranceAgriMer from Kantar Worldpanel
Main species purchased frozen in 2018 (1)

tons (2)

- Pollock: 26,342 tons
- Ready meals: 3,210,508 tons
- Cod: 5,661 tons
- Crustace, biv, cephalo-seafood ready meals: 10,386 tons
- Salmon: 6,696 tons
- Shrimp/king prawns: 2,805 tons
- Squid: 3,746 tons
- Scallop: 1,451 tons
- Frozen seafood: 2,168 tons
- Hake: 3,002 tons
- Scallop without shell: 2,413 tons
- Mussels: 940 tons
- Seafood ready meals-mussels: 7,730 tons

million euros

- Pollock: 28,814 million euros
- Ready meals: 1,789 million euros
- Cod: 36 million euros
- Crustace, biv, cephalo-frozen biv: 156 million euros
- Salmon: 111 million euros
- Shrimp/king prawns: 71 million euros
- Crustace, biv, cephalo-seafood frozen ready meals: 55 million euros
- Scallop: 77 million euros
- Frozen seafood: 27 million euros
- Squid: 30 million euros
- Hake: 13 million euros
- Lobster: 18 million euros
- Mussels: 5 million euros

percentage of purchasing households (in %)

- Frozen fish-pollock: 46%
- Ready meals: 38%
- Cod: 25%
- Crustace, biv, cephalo-frozen biv: 22%
- Shrimp/king prawns: 22%
- Salmon: 21%
- Scallop: 13%
- Scallop without shell: 13%
- Squid: 10%
- Frozen seafood: 9%
- Hake: 5%
- Mussels: 5%

Source: FranceAgriMer from Kantar Worldpanel
Spending in 2017

by presentation (million euros)

<table>
<thead>
<tr>
<th>Presentation</th>
<th>Million Euros</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fish</td>
<td>1,055</td>
</tr>
<tr>
<td>Chilled deli/catering</td>
<td>396</td>
</tr>
<tr>
<td>Cheeses</td>
<td>213</td>
</tr>
<tr>
<td>Fruit</td>
<td>157</td>
</tr>
<tr>
<td>Canned</td>
<td>69</td>
</tr>
<tr>
<td>Cephalopods</td>
<td>52</td>
</tr>
<tr>
<td>Total</td>
<td>1,942</td>
</tr>
</tbody>
</table>

by catering outlet type (million euros)

<table>
<thead>
<tr>
<th>Outlet Type</th>
<th>Million Euros</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-managed catering</td>
<td>311</td>
</tr>
<tr>
<td>Institutional catering firm</td>
<td>194</td>
</tr>
<tr>
<td>Independent restaurant outlets</td>
<td>1,224</td>
</tr>
<tr>
<td>Restaurant chains and groups</td>
<td>214</td>
</tr>
</tbody>
</table>

Source: FranceAgriMer from GiraFoodService
Spending by catering outlet and by presentation in 2017

Fish products

- Self-managed institutional catering: 22%
- Institutional catering firms: 16%
- Independent restaurant outlets: 53%
- Restaurant chains and groups: 9%

Chilled delicatessen products

- Self-managed institutional catering: 30%
- Institutional catering firms: 19%
- Independent restaurant outlets: 94%
- Restaurant chains and groups: 17%

Shellfish products %

- Self-managed institutional catering: 7%
- Institutional catering firms: 4%
- Independent restaurant outlets: 72%
- Restaurant chains and groups: 17%

Crustaceans in %

- Self-managed institutional catering: 2%
- Institutional catering firms: 2%
- Independent restaurant outlets: 71%
- Restaurant chains and groups: 5%

Canned products en %

- Self-managed institutional catering: 49%
- Institutional catering firms: 24%
- Independent restaurant outlets: 20%
- Restaurant chains and groups: 9%

Céphalopodes en %

- Self-managed institutional catering: 16%
- Institutional catering firms: 8%
- Independent restaurant outlets: 71%
- Restaurant chains and groups: 5%

Source: FranceAgriMer from GiraFoodService
Consumption

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

- Restaurant chains and groups: 48% fresh, 48% frozen, 4% canned
- Independent restaurant outlets: 76% fresh, 22% frozen, 2% canned
- Institutional catering firms: 26% fresh, 65% frozen, 9% canned
- Self-managed institutional catering: 14% fresh, 75% frozen, 11% canned

Breakdown of purchases by outlet for different presentations (quantities)

- Restaurant chains and groups: 56% whole, 44% processed
- Independent restaurant outlets: 60% whole, 40% processed
- Institutional catering firms: 10% whole, 90% processed
- Self-managed institutional catering: 11% whole, 89% processed

(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 April the 12th 2019.

**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 2018 of sales reported in tide halls
- FranceAgriMer Annual report 2018 of foreign trade in fishery products and aquaculture *
- FranceAgriMer Annual report 2018 on the consumption of fishery products and aquaculture *

* coming 2019