The fisheries and aquaculture sector in France

Production
Firms
Trade
Consumption
SUMMARY

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

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- Trading firms
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PRODUCTION

fishing fleet / aquaculture firms / jobs

total sales of fisheries and aquaculture products
France in the EU-28 and in the world in 2016

Quantities sold in 2016\(^{(1)}\)

by method of production (million tons) \(^{(2)}\)

- total: 758 million tons
- fish farming: 41
- shellfish farming: 192

Value of sales in 2016\(^{(2)}\)

by method of production (million euros)

- total: 2 163 million euros
- fish farming: 168
- shellfish farming: 657

(1) excluding seaweeds - (2) equivalent live weight - (3) total sales to processing industry and export sales
(4) including farmed crustaceans

Source: MAA / DPMA / Eumofa
Changes in quantities sold in metropolitan France \(^{(1)}\)

(1 000 tons) \(^{(3)}\)

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

tons

- oyster: 118 900
- tuna: 102 300
- mussel: 55 400
- hake: 45 000
- trout: 28 000
- sardine: 25 700
- scallop\(^1\): 24 600
- monkfish: 23 800
- mackerel\(^1\): 20 600
- saithe\(^1\): 14 000
- whiting\(^1\): 12 700
- cod\(^1\): 10 500
- blue whiting\(^1\): 10 100

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

Source: MEEM / CGDD / SOeS
Fresh and frozen landings in 2018(1)

Sales
value (million euros) / quantity (tons) (2)

Hauts-de-France
53 M€ / 12,271 t

Normandie
91 M€ / 37,113 t

Bretagne
255 M€ / 76,810 t

Pays de-la-Loire
96 M€ / 19,280 t

Nouvelle Aquitaine
81 M€ / 15,873 t

Occitanie
34 M€ / 7,718 t

PACA (3)
6 M€ / 1,442 t

(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

184,101 tons
value of sales 623 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

Source: VISIOMer/ FranceAgriMer
Breakdown of quantities sold and value of sales at auction in 2018 by fleet segment (1)(2)(3)

Number of vessels (sales at auction in 2018) (1)(2)(3)

(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
Production / 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)

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

Source: VISIOMer/ FranceAgriMer
Shellfish farming 2016

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

- Mussel: 55,200 tons
- Ster: 118,900 tons
- Oyster: 17,700 tons
- Total sales: 191,800 tons

Value of sales (million euros)

- Mussel: 22 million euros
- Ster: 657 million euros
- Oyster: 149 million euros
- Total sales: 168 million euros

Fish farming 2016

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

- Seabass, Seabream and other marine fish: 4,830 tons
- Trout and Salmon: 900 tons
- Carp and other freshwater fish\(^{(2)}\): 8,000 tons
- Total sales: 40,730 tons

Value of sales (million euros)

- Seabass, Seabream and other marine fish: 41 million euros
- Carp and other freshwater fish\(^{(2)}\): 14 million euros
- Trout and Salmon: 113 million euros
- Total sales: 168 millions d’€

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

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

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

- **less than 10 meters**: 3,562
- **from 10 to < 12 meters**: 670
- **from 12 to < 24 meters**: 149
- **from 24 to < 40 meters**: 36
- **more than 40 meters**: 1,369

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

- **Small scale fisheries**: 4,417
- **Coastal fisheries**: 3,253
- **Offshore fisheries**: 2,700
- **High seas fisheries**: 457
- **Aquaculture and small scale fisheries**: 193

**Source:** IFREMER 2017 + study on overseas territories

**Notes:**
- (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.
- Ship length: less than 10 meters, from 10 to < 12 meters, from 12 to < 24 meters, from 24 to < 40 meters, more than 40 meters.
- Ship categories: 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 or over 150 GRT if out of port more than 20 days).
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>
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<tr>
<td>1997</td>
<td>4,656</td>
<td>1,318</td>
<td>279</td>
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<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>
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<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

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
**Jobs**

Number of seamen employed on board French fishing vessels in 2016 (seamen of all nationalities)

- **Total France**: 13,536
  - Metropolitan France: 9,575
  - Overseas territories: 3,961

**Regional sharing**

- **Eastern Channel, North Sea**: 826
- **Celtic Sea, West of Scotland, Island**: 2,700
- **Bay of Biscay**: 3,022
- **Mediterranean Sea**: 2,022

**Number of full time equivalent jobs in 2016**

<table>
<thead>
<tr>
<th>Category</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</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: MAA/DAM/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

Source: Via.Aqua pour FranceAgriMer
**Trading firms in 2016**

- **Number of firms**: 278
- **Jobs**: 5,945
- **Net sales**: 2,384 million euros

**Breakdown of firms and total net sales by region**

- **Hauts-de-France**: 12% / 14% / 18%
- **Normandy**: 17% / 11% / 7%
- **Brittany**: 34% / 34% / 28%
- **Atlantique**: 19% / 21% / 28%
- **Méditerranée**: 12% / 7% / 8%
- **Others regions including overseas territories**: 6% / 13% / 20%

**Source**: FranceAgriMer

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(1) data 2014 or 2015

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Key figures FranceAgriMer 2019 / The fisheries and aquaculture / 17
**Firms**

**Processing main activity firms in 2017**

- **Number of firms:** 199
- **Net sales per firm:** 4,782 million euros (including seafood and fish farming processing)
- **Jobs:** 13,996
- **Net sales per firm:** 4,267 million euros for processing including seafood and fish farming processing

**Seafood processing net sales**

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

**Breakdown of firms by total net sales**

- < 5 M€: 2%
- 5 M€ and 15 M€: 14%
- 15 M€ and 50 M€: 21%
- 50 M€ and 200 M€: 20%
- 200 M€ and 500 M€: 23%
- 500 M€ and over: 40%

**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%

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

imports / exports
by presentation / by species / by geographical origine /
main species
Supply balance in 2018

Net weight (1,000 tons)

Value (million euros)

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

Value (million euros)

### Imports

- **Salmon**: 352
- **Shrimp**: 222
- **Tuna**: 662
- **Cod**: 490
- **Saithe, Pollack**: 250
- **Scallop**: 175
- **Crabs**: 96
- **Mussels**: 88
- **Lobster**: 79
- **Sardine**: 75
- **Mackerel**: 66
- **Lobster**: 62
- **Norway Lobster**: 61
- **Hake**: 60
- **Seabream**: 57

### Exports - main species in 2018

Value (million euros)

- **Tuna**: 252
- **Salmon**: 216
- **Shrimp**: 133
- **Oyster**: 95
- **Cuttlefish**: 56
- **Saithe, Pollack**: 31
- **Squid**: 35
- **Trout**: 33
- **Cod**: 32
- **Scallop**: 30
- **Crabs**: 26
- **Monkfish**: 23
- **Hake**: 22
- **Eel, Glass Eel**: 21
- **Lobster**: 21

Source: French customs
Imports by presentation in 2018

Imports by volume (1,000 tons)

<table>
<thead>
<tr>
<th>Presentation</th>
<th>Volume (1,000 tons)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Frozen</td>
<td>429</td>
</tr>
<tr>
<td>Live, fresh, chilled</td>
<td>496</td>
</tr>
<tr>
<td>Canned</td>
<td>383</td>
</tr>
<tr>
<td>Salted, dried, smoked</td>
<td>428</td>
</tr>
<tr>
<td>Non food use</td>
<td>103</td>
</tr>
</tbody>
</table>

Imports by value (million euros)

<table>
<thead>
<tr>
<th>Presentation</th>
<th>Value (million euros)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Frozen</td>
<td>2,254</td>
</tr>
<tr>
<td>Live, fresh, chilled</td>
<td>2,240</td>
</tr>
<tr>
<td>Canned</td>
<td>1,016</td>
</tr>
<tr>
<td>Salted, dried, smoked</td>
<td>299</td>
</tr>
<tr>
<td>Non food use</td>
<td>171</td>
</tr>
</tbody>
</table>

Imports by species group in 2018

Imports by volume (1,000 tons)

<table>
<thead>
<tr>
<th>Species Group</th>
<th>Volume (1,000 tons)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marine fish</td>
<td>1,218</td>
</tr>
<tr>
<td>Crustaceans</td>
<td>173</td>
</tr>
<tr>
<td>Trout, salmon, eel, and fresh water fish</td>
<td>227</td>
</tr>
<tr>
<td>Bivalves and cephalopods</td>
<td>271</td>
</tr>
<tr>
<td>Non food use</td>
<td>103</td>
</tr>
</tbody>
</table>

Imports by value (million euros)

<table>
<thead>
<tr>
<th>Species Group</th>
<th>Value (million euros)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marine fish</td>
<td>2,640</td>
</tr>
<tr>
<td>Crustaceans</td>
<td>1,146</td>
</tr>
<tr>
<td>Trout, salmon, eel, and fresh water fish</td>
<td>1,399</td>
</tr>
<tr>
<td>Bivalves and cephalopods</td>
<td>568</td>
</tr>
<tr>
<td>Non food use</td>
<td>171</td>
</tr>
</tbody>
</table>

(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)*

![Imports chart](chart)

**Exports of aquatic products by destination in 2018**

*Value (million euros)*

![Exports chart](chart)

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

Supply balance in 2016 \(^{(1)}\) \(^{(2)}\) \(^{(3)}\)

Source: FranceAgriMer

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

Average annual consumption per capita: 34 kg

<table>
<thead>
<tr>
<th>Category</th>
<th>Quantity (kg)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fish farming</td>
<td>4</td>
</tr>
<tr>
<td>Salmon</td>
<td>3</td>
</tr>
<tr>
<td>Others/farming</td>
<td>7</td>
</tr>
<tr>
<td>Mussel</td>
<td>3</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>Fish from catches</td>
<td>20</td>
</tr>
<tr>
<td>Tuna</td>
<td>4</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>1.90</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 growth rate over the last ten years: -0.61%

**Breakdown by products in 2015**

- 21% farmed shellfish
- 10% shellfish from catches
- 11% farmed finfish
- 58% finfish from catches

(1) Data collection methodology is detailed on inside back cover - (2) Live weight - (3) Average 2013-2015

Source: FranceAgriMer

Average annual consumption per capita: 34 kg

Source: FranceAgriMer
Households spending in 2018 (1)

Percentage of purchasing households in 2018 (2)

Consommation des ménages sur 10 ans

<table>
<thead>
<tr>
<th></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 (3)</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

**Fresh products**
- 54% fish fillets
- 14% whole fish
- 22% crustaceans
- 6% bivalves and cephalopods

**Chilled delicatessen**
- 33% cured fish
- 18% cooked shrimp
- 10% surimi
- 39% others

**Frozen products**
- 50% fish
- 11% crustaceans
- 15% bivalves and cephalopods
- 22% ready meals

**Canned products**
- 48% tuna (excluding tuna salads)
- 15% mackerel
- 16% sardine
- 18% others
- 3% tuna salads

(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
  - oyster
  - salmon
  - cod
  - saithe
  - scallops
  - seabream
  - trout
  - monkfish
  - whelk
  - mackerel
  - whiting
  - scallop without shell
  - scallop
  - norway lobster
  - sole
  - hake

- **million euros**
  - salmon
  - cod
  - oyster
  - mussel
  - saithe
  - monkfish
  - trout
  - seabream
  - seabass
  - whiting
  - scallop without shell
  - scallop
  - norway lobster
  - sole
  - hake

- **percentage of purchasing households (%)**
  - salmon
  - cod
  - mussel
  - saithe
  - trout
  - oyster
  - whiting
  - seabream
  - ling
  - whelk
  - seabass
  - mackerel
  - sardine
  - haddock
  - monkfish

(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 (2)**
- Surimi stick
- Shrimp/cooked king prawns (without bar code)
- Smoked salmon
- Ready meals with fish
- Seafood salads
- Shrimp/cooked king prawns (with bar code)
- Starters & cooked meals-salt cod and potato mash
- Precooked fish-breaded fish
- Smoked trout
- Smoked herring
- Spreads-terrines rillettes
- Marinades
- Sushi/sashimi/maki
- Seafood soup
- Bites/fish balls/fritters

**Million euros**
- Smoked salmon
- Shrimp/cooked king prawns (without bar code)
- Surimi stick
- Shrimp/cooked king prawns (with bar code)
- Smoked trout
- Ready meals with fish
- Ready raw fish-sushi/sashimi/maki
- Seafood salads
- Precooked fish-breaded fish
- Starters & cooked meals-salt cod and potato mash
- Spreads-terrines rillettes
- Marinades
- Spreads-fish eggs
- Smoked herring
- Bites/fish balls/fritters

**Percentage of purchasing households (in %)**
- Smoked salmon
- Surimi stick
- Starters and ready meals
- Smoked trout
- Shrimp/cooked king prawns (without bar code)
- Shrimp/cooked king prawns (with bar code)
- Precooked fish
- Smoked herring
- Ready meals with fish
- Seafood salads
- Spreads-terrines rillettes
- Marinades

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

Tons

- Pollock: 28,542 tons
- Ready meals: 23,472 tons
- Crustace, biv, cephalo-seafood ready meals: 11,270 tons
- Cod: 10,386 tons
- Salmon: 6,696 tons
- Shrimp/king prawns: 5,661 tons
- Squid: 3,467 tons
- Scallop: 3,746 tons
- Frozen seafood: 2,805 tons
- Hake: 2,413 tons
- Scallop without shell: 2,168 tons
- Mussels: 1,451 tons
- Seafood ready meals-mussels: 940 tons

Million euros

- Pollock: 179 million euros
- Ready meals: 156 million euros
- Crustace, biv, cephalo-frozen biv: 133 million euros
- Salmon: 93 million euros
- Shrimp/king prawns: 66 million euros
- Crustace, biv, cephalo-seafood frozen ready meals: 56 million euros
- Scallop: 29 million euros
- Frozen seafood: 18 million euros
- Squid: 14 million euros
- Hake: 10 million euros
- Lobster: 5 million euros
- Mussels: 4 million euros

Percentage of purchasing households (in %)

- Frozen fish-pollock: 46%
- Ready meals: 38%
- Crustace, biv, cephalo-frozen biv: 25%
- Shrimp/king prawns: 22%
- Salmon: 22%
- Scallop: 19%
- Scallop without shell: 13%
- Squid: 13%
- Frozen seafood: 10%
- Hake: 9%
- Mussels: 5%
- Seafood ready meals-mussels: 5%

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

#### Tons (2)

<table>
<thead>
<tr>
<th>Product</th>
<th>Sales (tons)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuna</td>
<td>20,267</td>
</tr>
<tr>
<td>Mackerel</td>
<td>1,835</td>
</tr>
<tr>
<td>Sardine</td>
<td>1,831</td>
</tr>
<tr>
<td>Fish soup-crustaceans</td>
<td>6,536</td>
</tr>
<tr>
<td>Fish spread-tuna</td>
<td>3,996</td>
</tr>
<tr>
<td>Canned crustaceans except spread</td>
<td>694</td>
</tr>
<tr>
<td>Canned cephalopods except spread</td>
<td>1,680</td>
</tr>
<tr>
<td>Anchovy</td>
<td>372</td>
</tr>
<tr>
<td>Fish spread-mackerel</td>
<td>139</td>
</tr>
<tr>
<td>Salmon</td>
<td>677</td>
</tr>
<tr>
<td>Canned bivalves except spread</td>
<td>139</td>
</tr>
<tr>
<td>Fish spread-salmon</td>
<td>37</td>
</tr>
<tr>
<td>Fish spread-sardine</td>
<td>25</td>
</tr>
<tr>
<td>Fish spread-mackerel</td>
<td>11</td>
</tr>
<tr>
<td>Bivalves, crustaceans and cephal spread</td>
<td>2</td>
</tr>
<tr>
<td>Fish spread-anchovy</td>
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</table>

#### Million euros

<table>
<thead>
<tr>
<th>Product</th>
<th>Sales (€)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuna</td>
<td>67,837</td>
</tr>
<tr>
<td>Mackerel</td>
<td>16,464</td>
</tr>
<tr>
<td>Sardine</td>
<td>16,169</td>
</tr>
<tr>
<td>Fish soup-crustaceans</td>
<td>5,292</td>
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<tr>
<td>Fish spread-tuna</td>
<td>1,169</td>
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<tr>
<td>Canned crustaceans except spread</td>
<td>1,119</td>
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<tr>
<td>Canned cephalopods except spread</td>
<td>7,777</td>
</tr>
<tr>
<td>Anchovy</td>
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<tr>
<td>Fish spread-mackerel</td>
<td>49</td>
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<tr>
<td>Salmon</td>
<td>35</td>
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<tr>
<td>Canned bivalves except spread</td>
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</tr>
<tr>
<td>Fish spread-salmon</td>
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<tr>
<td>Fish spread-sardine</td>
<td>2</td>
</tr>
<tr>
<td>Fish spread-mackerel</td>
<td>2</td>
</tr>
<tr>
<td>Bivalves, crustaceans and cephal spread</td>
<td>2</td>
</tr>
<tr>
<td>Fish spread-anchovy</td>
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</tr>
</tbody>
</table>

#### Percentage of purchasing households (in %)

<table>
<thead>
<tr>
<th>Product</th>
<th>Percentage</th>
</tr>
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<tbody>
<tr>
<td>Tuna</td>
<td>86%</td>
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<tr>
<td>Mackerel</td>
<td>49%</td>
</tr>
<tr>
<td>Sardine</td>
<td>49%</td>
</tr>
<tr>
<td>Fish soup-crustaceans</td>
<td>13%</td>
</tr>
<tr>
<td>Fish spread-tuna</td>
<td>13%</td>
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<tr>
<td>Canned crustaceans except spread</td>
<td>10%</td>
</tr>
<tr>
<td>Canned cephalopods except spread</td>
<td>9%</td>
</tr>
<tr>
<td>Anchovy</td>
<td>7%</td>
</tr>
<tr>
<td>Fish spread-salmon</td>
<td>5%</td>
</tr>
<tr>
<td>Salmon</td>
<td>4%</td>
</tr>
<tr>
<td>Canned bivalves except spread</td>
<td>2%</td>
</tr>
<tr>
<td>Fish spread-sardine</td>
<td>2%</td>
</tr>
<tr>
<td>Fish spread-mackerel</td>
<td>2%</td>
</tr>
<tr>
<td>Bivalves, crustaceans and cephal spread</td>
<td>2%</td>
</tr>
<tr>
<td>Fish spread-anchovy</td>
<td>0%</td>
</tr>
</tbody>
</table>

Source: FranceAgriMer from Kantar Worldpanel
Spending in 2017

by presentation (million euros)

by catering outlet type (million euros)

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

Fish products

<table>
<thead>
<tr>
<th>Outlet Type</th>
<th>0%</th>
<th>10%</th>
<th>20%</th>
<th>30%</th>
<th>40%</th>
<th>50%</th>
<th>60%</th>
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<tbody>
<tr>
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<td>22</td>
<td>7</td>
<td>4</td>
<td>16</td>
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<td>14</td>
<td>22</td>
<td>34</td>
<td>37</td>
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<td></td>
<td>53</td>
</tr>
<tr>
<td>Restaurant chains and groups</td>
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</table>

Shelfish products %

<table>
<thead>
<tr>
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<th>0%</th>
<th>10%</th>
<th>20%</th>
<th>30%</th>
<th>40%</th>
<th>50%</th>
<th>60%</th>
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</thead>
<tbody>
<tr>
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<td>7</td>
<td>72</td>
<td>2</td>
<td>17</td>
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<tr>
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<td>4</td>
<td>17</td>
<td>17</td>
<td>2</td>
<td>2</td>
<td>0</td>
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<td>Independent restaurant outlets</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>17</td>
</tr>
<tr>
<td>Restaurant chains and groups</td>
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<td></td>
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<td></td>
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Chilled delicatessen products

<table>
<thead>
<tr>
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<th>0%</th>
<th>10%</th>
<th>20%</th>
<th>30%</th>
<th>40%</th>
<th>50%</th>
<th>60%</th>
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</thead>
<tbody>
<tr>
<td>Self-managed institutional catering</td>
<td>30</td>
<td>34</td>
<td>30</td>
<td>24</td>
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<tr>
<td>Institutional catering firms</td>
<td>19</td>
<td>19</td>
<td>19</td>
<td>19</td>
<td>19</td>
<td>19</td>
<td>19</td>
</tr>
<tr>
<td>Independent restaurant outlets</td>
<td>34</td>
<td>34</td>
<td>34</td>
<td>34</td>
<td>34</td>
<td>34</td>
<td>34</td>
</tr>
<tr>
<td>Restaurant chains and groups</td>
<td>27</td>
<td>27</td>
<td>27</td>
<td>27</td>
<td>27</td>
<td>27</td>
<td>27</td>
</tr>
</tbody>
</table>

Canned products en %

<table>
<thead>
<tr>
<th>Outlet Type</th>
<th>0%</th>
<th>10%</th>
<th>20%</th>
<th>30%</th>
<th>40%</th>
<th>50%</th>
<th>60%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-managed institutional catering</td>
<td>45</td>
<td>24</td>
<td>13</td>
<td>9</td>
<td>9</td>
<td>9</td>
<td>9</td>
</tr>
<tr>
<td>Institutional catering firms</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
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<td>24</td>
</tr>
<tr>
<td>Independent restaurant outlets</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>13</td>
</tr>
<tr>
<td>Restaurant chains and groups</td>
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<td></td>
<td></td>
<td>9</td>
</tr>
</tbody>
</table>

Céphalopodes en %

<table>
<thead>
<tr>
<th>Outlet Type</th>
<th>0%</th>
<th>10%</th>
<th>20%</th>
<th>30%</th>
<th>40%</th>
<th>50%</th>
<th>60%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-managed institutional catering</td>
<td>16</td>
<td>8</td>
<td>6</td>
<td>6</td>
<td>6</td>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td>Institutional catering firms</td>
<td>8</td>
<td>8</td>
<td>8</td>
<td>8</td>
<td>8</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>Independent restaurant outlets</td>
<td>71</td>
<td>71</td>
<td>71</td>
<td>71</td>
<td>71</td>
<td>71</td>
<td>71</td>
</tr>
<tr>
<td>Restaurant chains and groups</td>
<td>6</td>
<td>6</td>
<td>6</td>
<td>6</td>
<td>6</td>
<td>6</td>
<td>6</td>
</tr>
</tbody>
</table>

Source: FranceAgriMer from GiraFoodService
Breakdown of purchases by king of conservation for different outlets (quantities)

<table>
<thead>
<tr>
<th>Distribution Channel</th>
<th>Fresh Products</th>
<th>Frozen Products</th>
<th>Canned Products</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restaurant chains and groups</td>
<td>48%</td>
<td>48%</td>
<td>4%</td>
</tr>
<tr>
<td>Independent restaurant outlets</td>
<td>76%</td>
<td>22%</td>
<td>2%</td>
</tr>
<tr>
<td>Institutional catering firms</td>
<td>26%</td>
<td>65%</td>
<td>9%</td>
</tr>
<tr>
<td>Self-managed institutional catering</td>
<td>14%</td>
<td>75%</td>
<td>11%</td>
</tr>
</tbody>
</table>

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

Source: FranceAgriMer from GiraFoodService

Breakdown of purchases by outlet for different presentations (quantities)

<table>
<thead>
<tr>
<th>Distribution Channel</th>
<th>Whole Fishing Products</th>
<th>Processed Products</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restaurant chains and groups</td>
<td>56%</td>
<td>44%</td>
</tr>
<tr>
<td>Independent restaurant outlets</td>
<td>60%</td>
<td>40%</td>
</tr>
<tr>
<td>Institutional catering firms</td>
<td>10%</td>
<td>90%</td>
</tr>
<tr>
<td>Self-managed institutional catering</td>
<td>11%</td>
<td>89%</td>
</tr>
</tbody>
</table>

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

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