

DATA

The fisheries and aquaculture sector in France – Data 2023

Production - Firms - Trade - Consumption

SUMMARY



Production page 2

France in the EU-28 & in the world in 2020
Total sales of fisheries and aquaculture products
Sales of fisheries products at auction
Sales of aquaculture products
Fishing fleet
Aquaculture firms
Jobs



Firms page 14

Fishmonger firms
Trading firms
Processing firms



Trade page 18

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

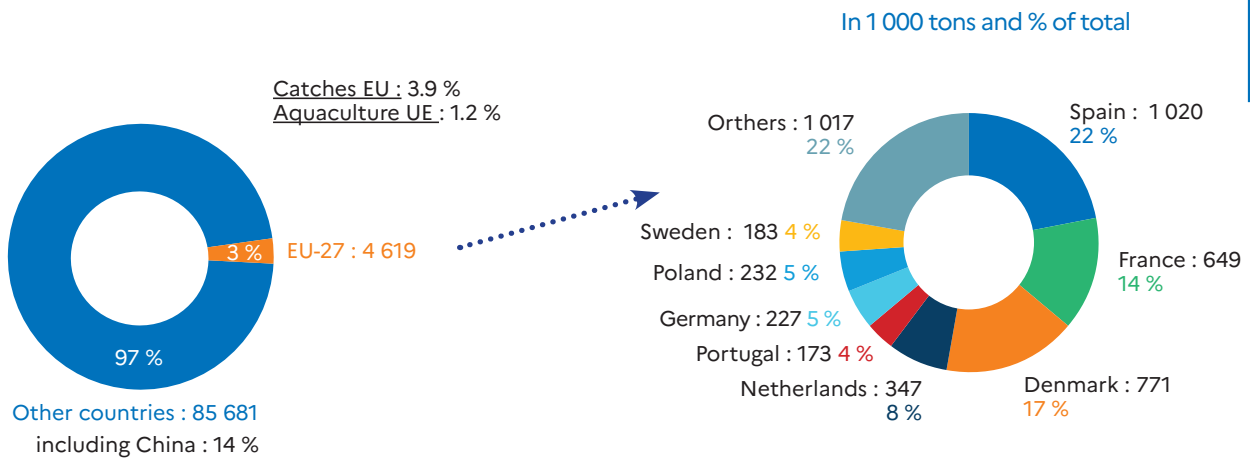
FISHING FLEET / AQUACULTURE FIRMS / JOBS

Total sales of fisheries and aquaculture products



• Total sales / metropolitan France and overseas territories

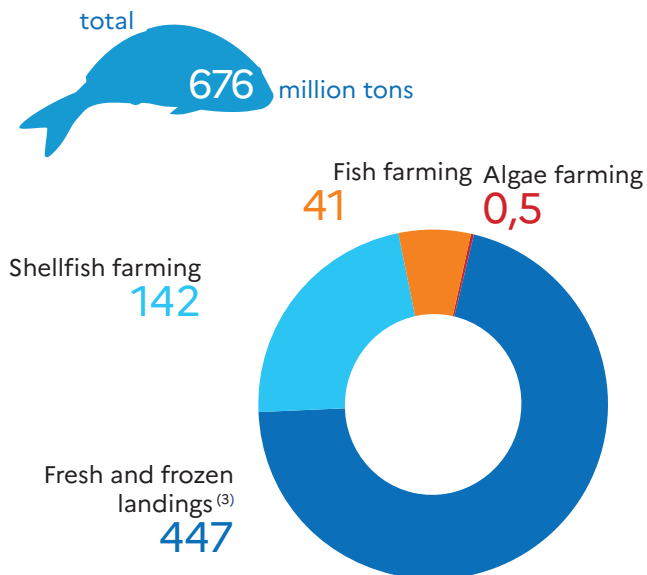
France in the EU-28 and in the world in 2020



Source : Eurostat and FAO

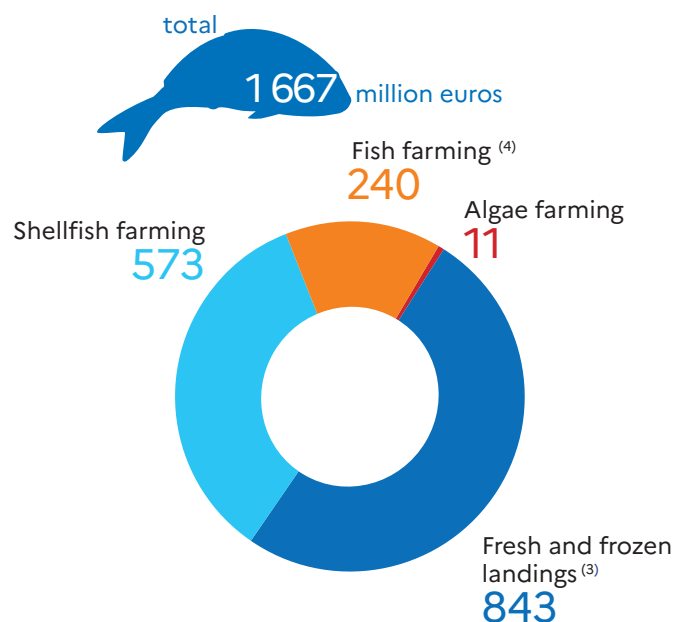
Quantities sold in 2022 ^{(1) (2)}

by method of production (1 000 tons)



Values of sales in 2022

by method of production (millions euros)



(1) Excluding seaweeds

(2) Equivalent live weight

(3) French auction sales, sales of landings abroad, sales to processing industry and export sales

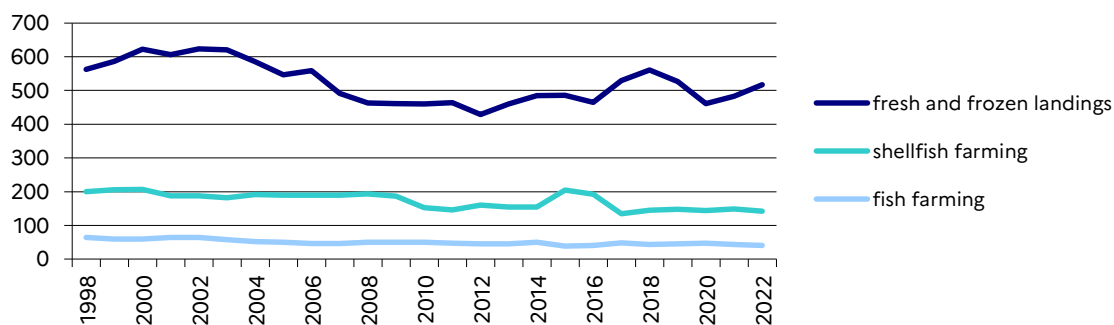
(4) Marine and continental

Source : MASA / DGAMPA / Eumofa / FAO

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

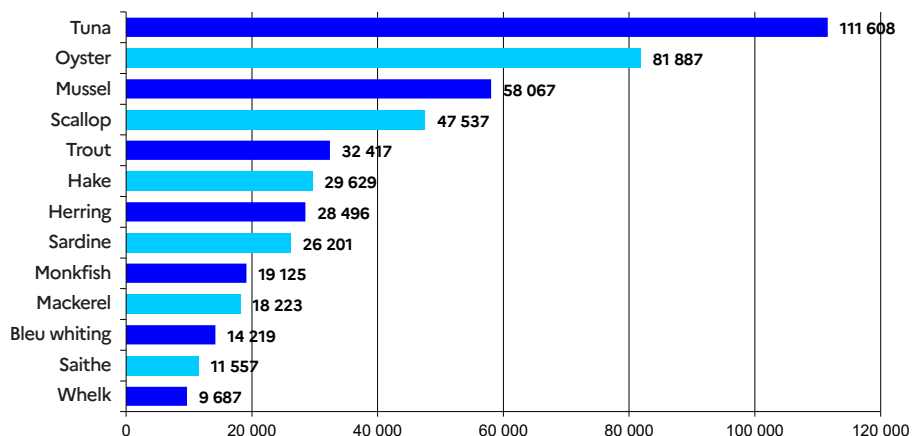
Changes in quantities sold in metropolitan France ⁽¹⁾

(1 000 tons) ⁽²⁾



Main species sold in metropolitan France in 2022 ⁽²⁾

(in tons)



(1) Including seaweeds

(2) Equivalent live weight

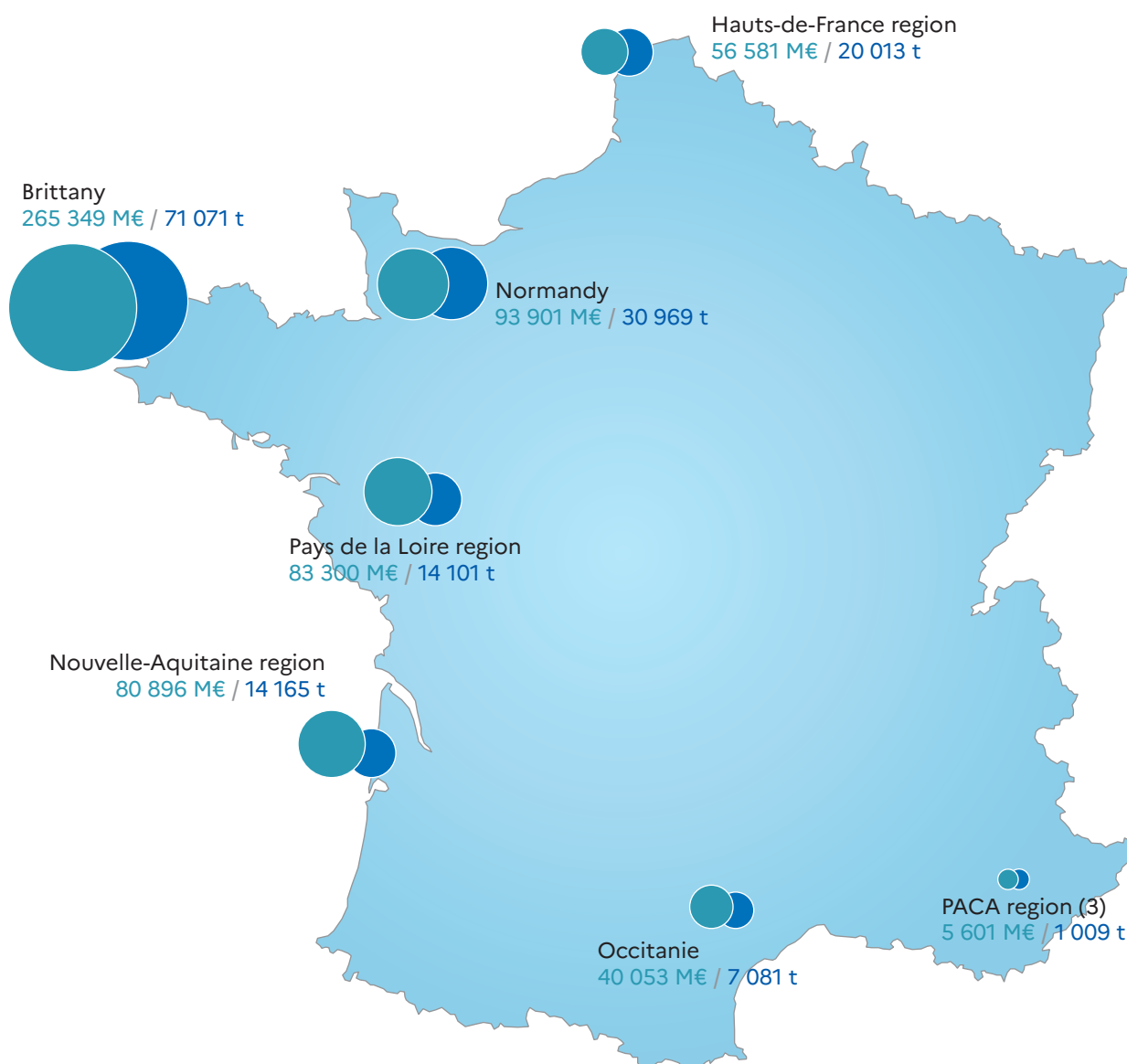
Source : MASA / DGAMPA

• Sales of fishery products

Fresh and frozen landings by region in 2023 ⁽¹⁾

Sales

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



(1) Excluding seaweeds and freshwater fishing

(2) In net weight

(3) Off-auction sales

Source : FranceAgriMer / VISIOMer

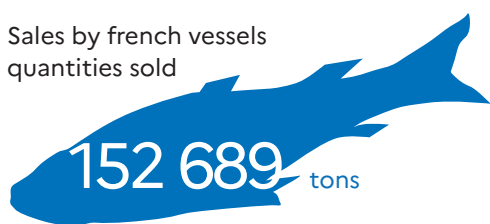
• Sales of fishery products

Sales of fishery products at auction in 2023

Number of auctions in 2023 : **34**

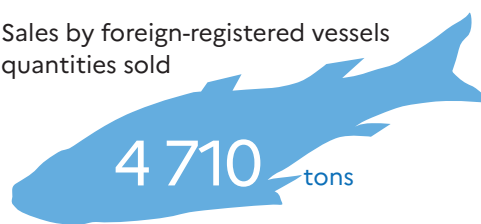


Sales by french vessels
quantities sold



Value of sales **604** million euros

Sales by foreign-registered vessels
quantities sold

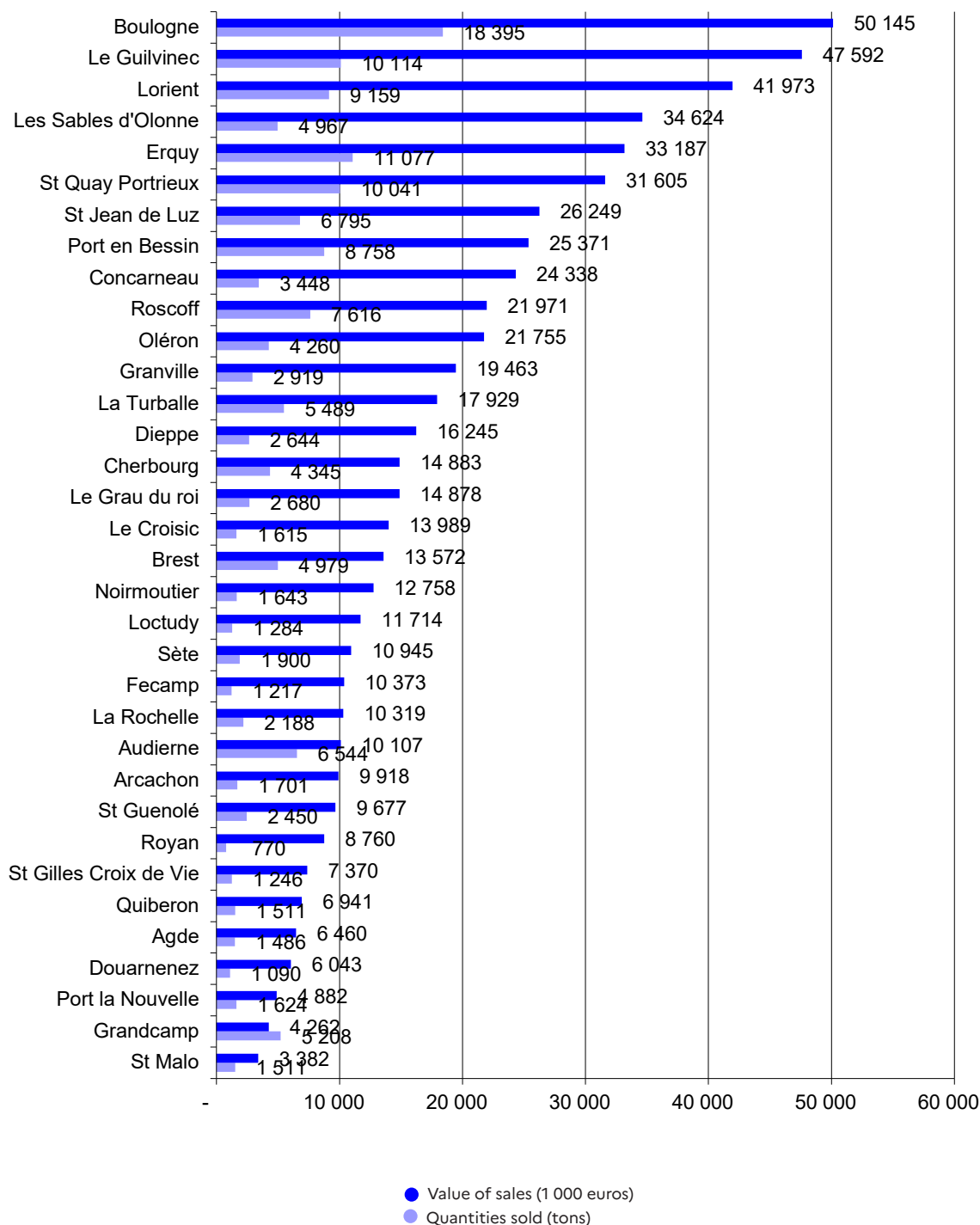


Value of sales **16** million euros

Source : FranceAgriMer / VISIOMer

• Sales of fishery products

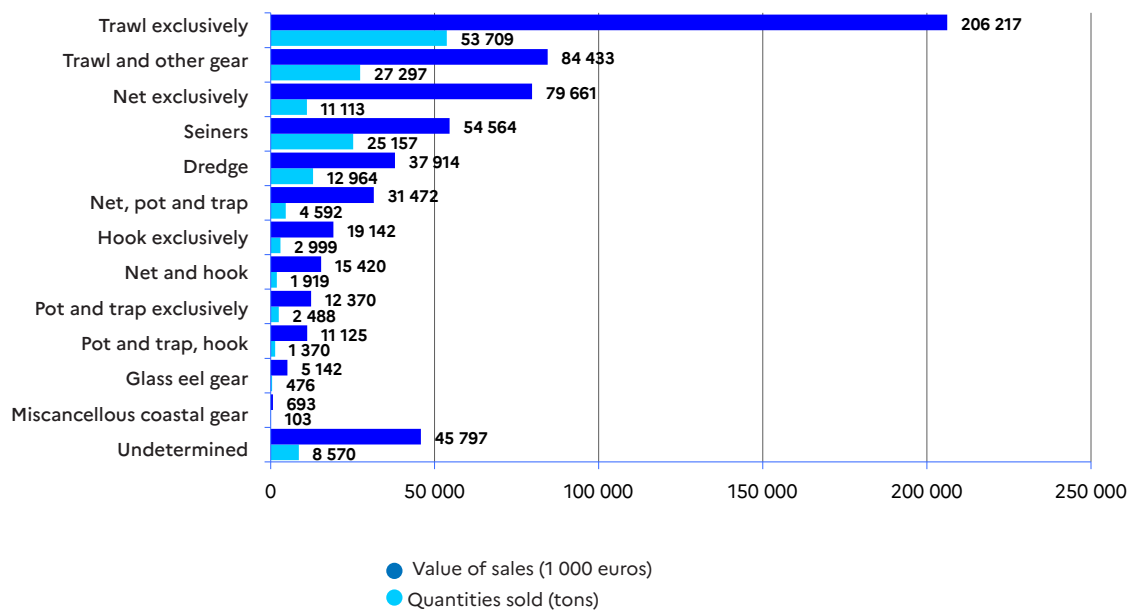
Quantities sold and value of sales by french vessels at auctions in 2023



Source : FranceAgriMer / VISIOMer

• Sales of fishery products

Breakdown of quantities sold and value of sales at auction in 2023 by fleet segment ⁽¹⁾



Number of french vessels (sales at auction in 2023) ⁽¹⁾

Pot and trap exclusively	129
Net and hook	114
Trawl exclusively	353
Trawl and other gear	420
Miscellaneous coastal gear	33
Dredge	298
Net exclusively	274
Net, pot and trap	277
Net and hook	95
Hook exclusively	135
Glass eel gear	147
Seiners	75
Undetermined	457
Total	2 807

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

Sources : FranceAgriMer / VISIOMer, Ifremer

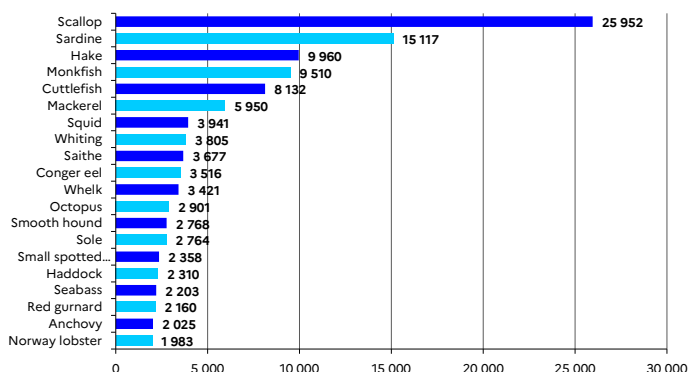
• Sales of fishery products



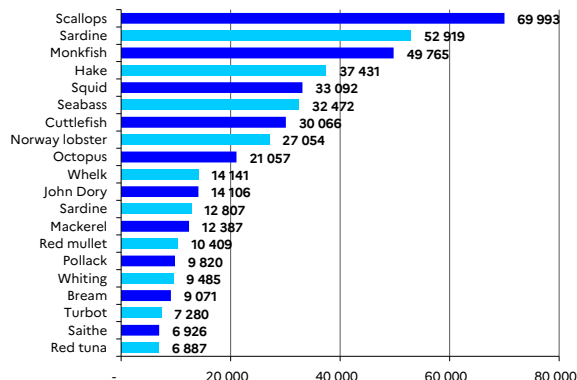
PRODUCTION

Main species sold at auction by french vessels in 2023

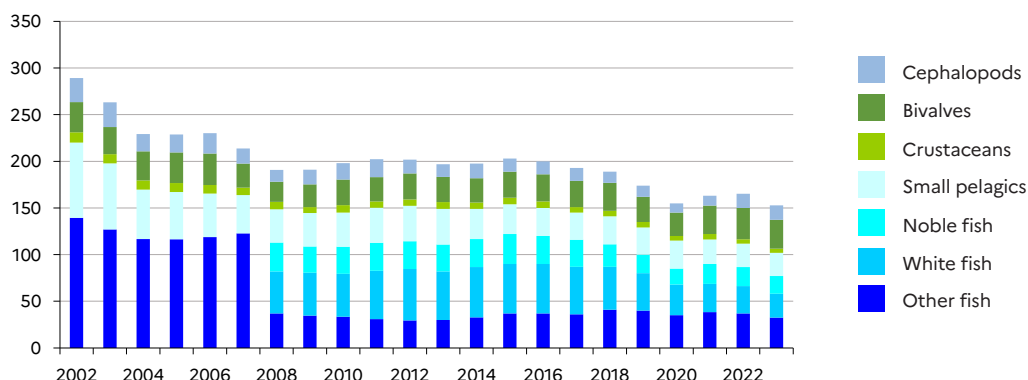
Quantities sold (in tons)



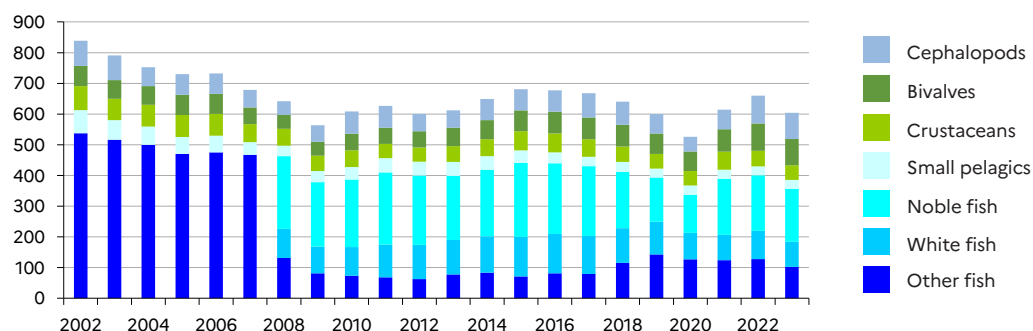
Value of sales (1 000 euros)



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



Changes in value of sales by the french vessels by species group (million euros) (1)

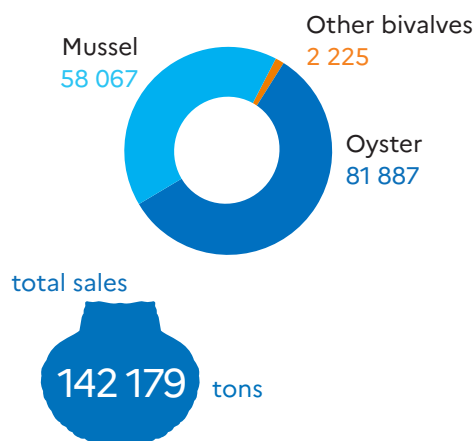


Source : FranceAgriMer / VISIOMer

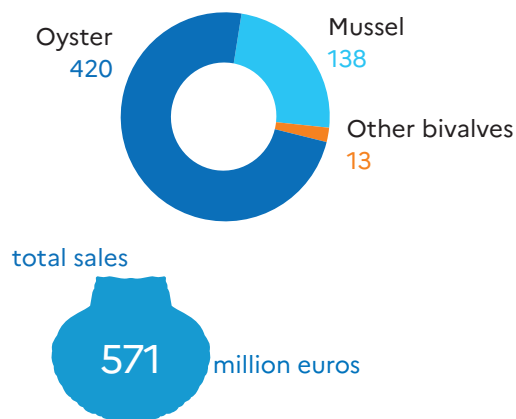
• Sales of aquaculture products in metropolitan France

Shellfish farming 2022

Quantities sold for consumption (in tons)⁽¹⁾

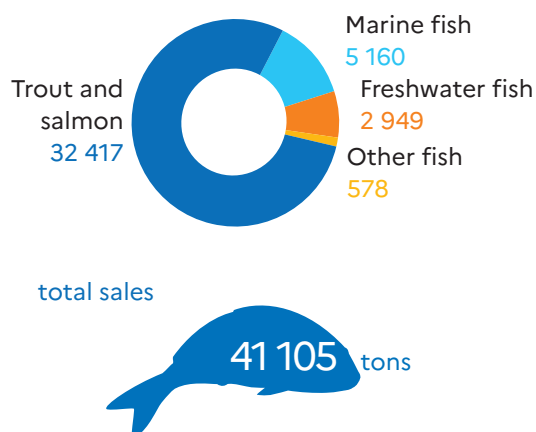


Value of sales (1 000 euros)

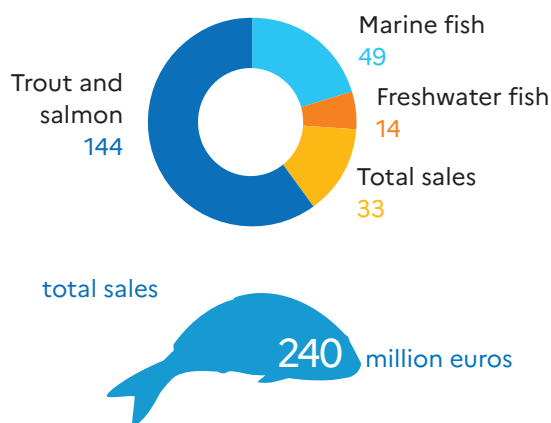


Fish farming 2022

Quantities sold for consumption (in tons)⁽¹⁾

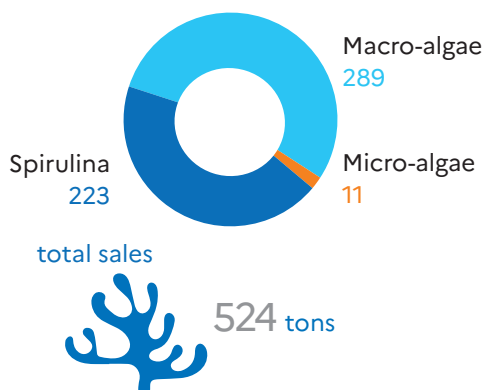


Value of sales (1 000 euros)

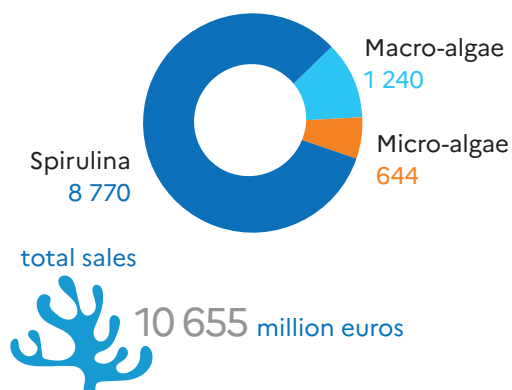


Algae farming 2022

Quantities sold for consumption (in tons)⁽¹⁾



Value of sales (million euros)



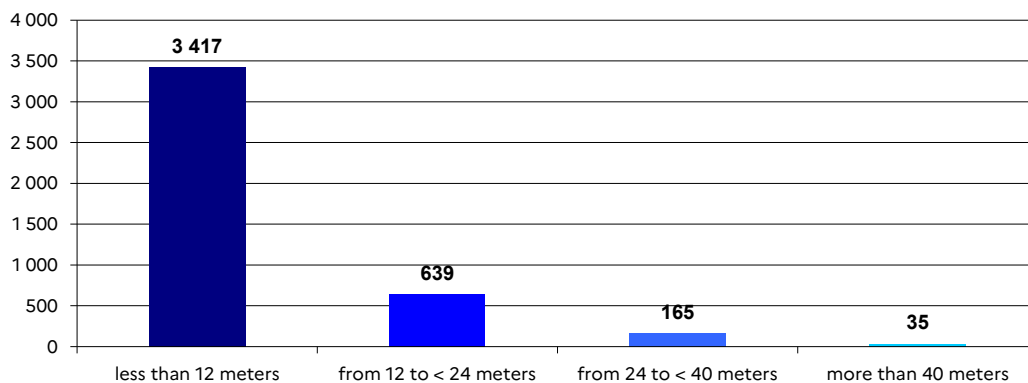
(1) Equivalent live weight

Source : DGAMPA Agreste data - Annual survey from SSPP

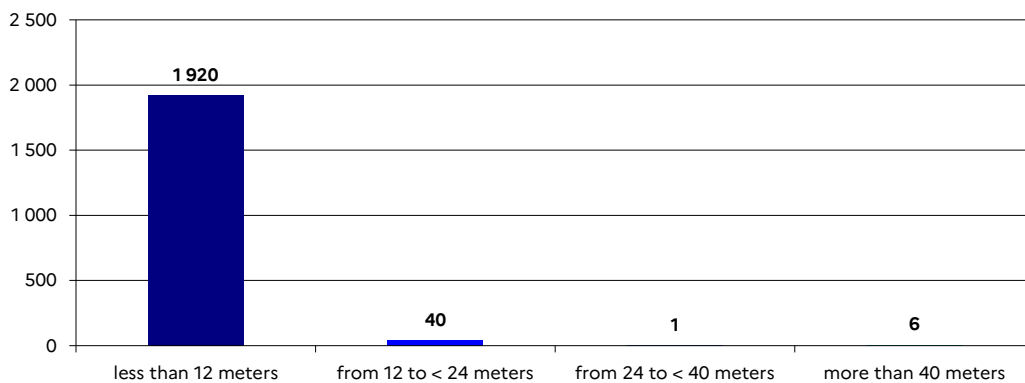
• Fishing fleet

Fishing fleet ⁽¹⁾

Number of ships by length in 2022 (metropolitan france)



Number of ships by length in 2022 (french overseas territories)



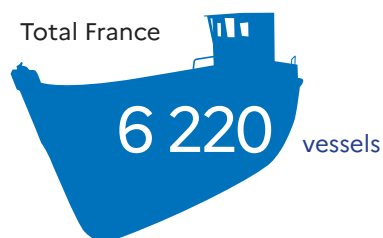
Metropolitan France

4 256



Overseas territories
1 964

Total 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

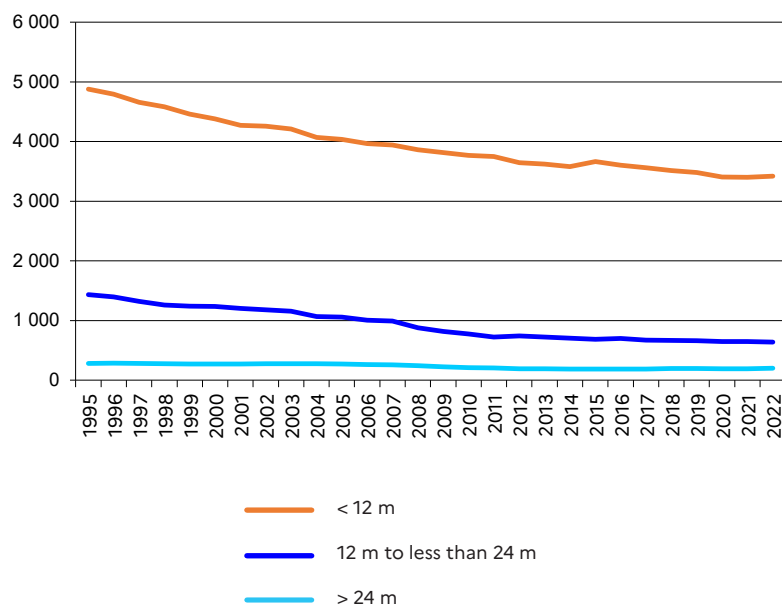
vessels over 1 000 GRT (gross register tonnage) or vessels over 150 GRT if out of port more than 20 days

(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 2022

• Fishing fleet / Aquaculture firms

Changes in the number of fishing vessels in metropolitan France



Source : Fleet file from IFREMER 2022

	< 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
2022	3 417	639	200

Aquaculture firms in 2022

Shellfish farming - including seaweed and shrimps	2 558
Marine fish farming and sturgeon	37
Continental salmonids farming	383
Algae farming	199

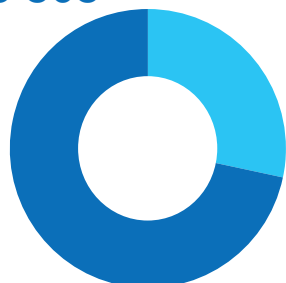
Source : DGAMPA Agreste data - Annual survey from SSP

• Jobs

Number of seamen employed on board french fishing vessels in 2021 (seamen of all nationalities)

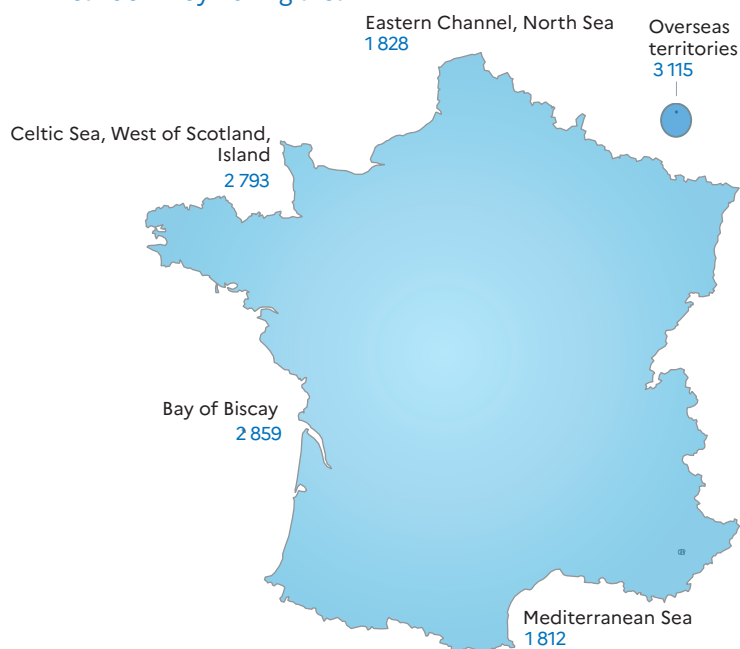
Metropolitan France

9 303



Overseas territories
3 155

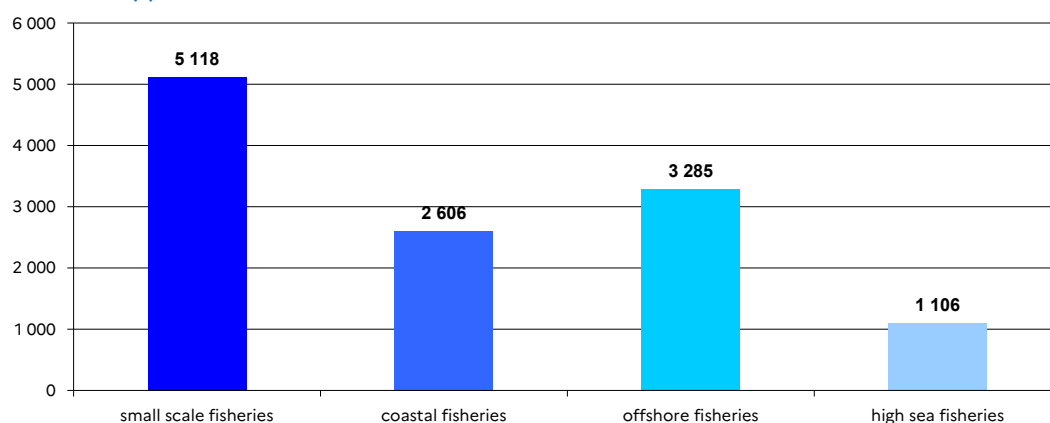
Breakdown by fishing area



Total France



Metropolitan france (1)



Number of full time equivalent jobs in 2022

	Jobs	FTEJ
Shellfish farming	17 162	9 546
Fish farming	3 002	2 031
Algae farming	515	415

Source : Agreste SSP data and OECD statistics

(1) Data 2022



FIRMS

FISHMONGERS / TRADING / PROCESSING

By sales / By region



• Fishmonger firms



FIRMS

Fishmonger's in 2016

Number of establishments



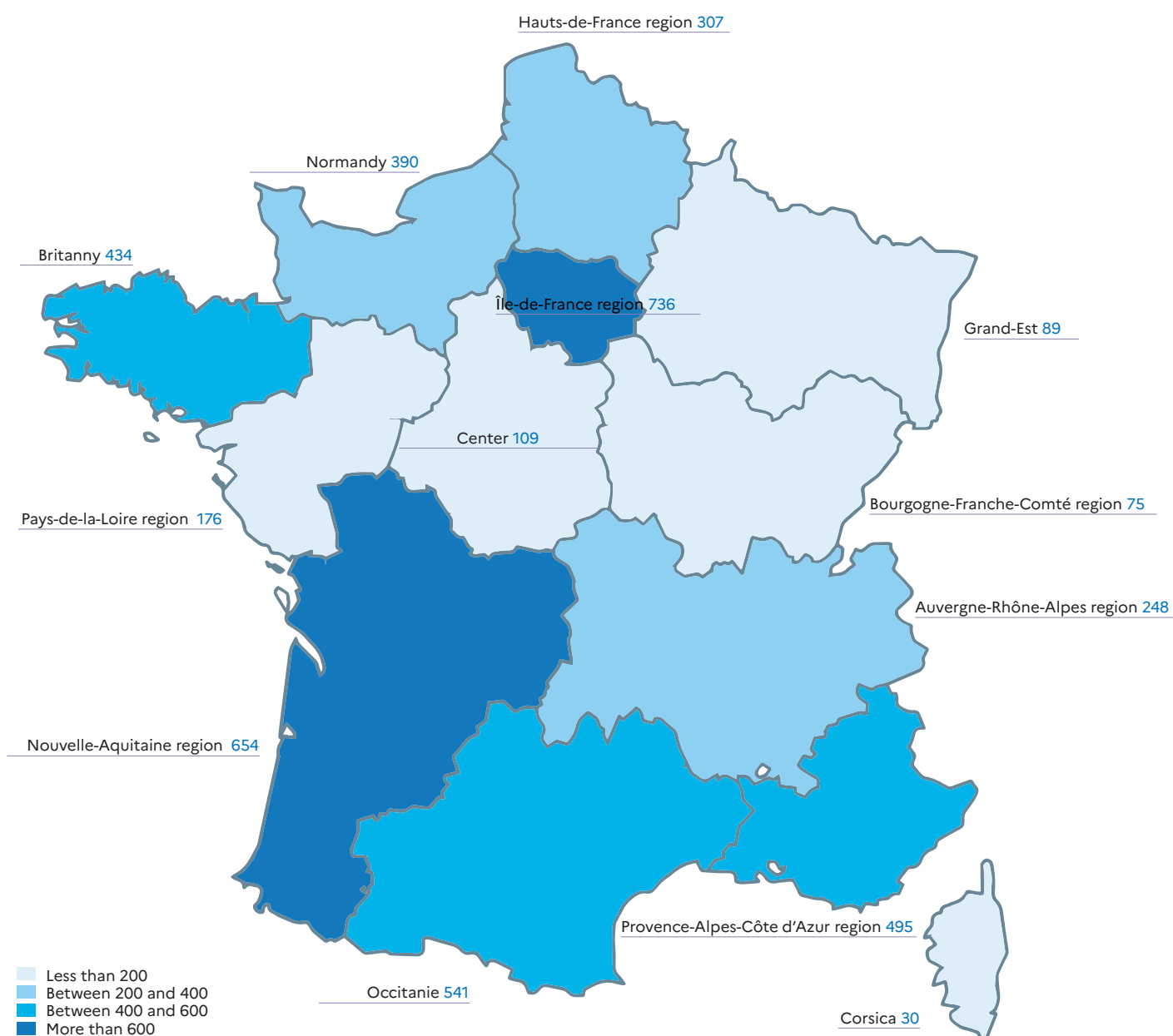
Hand sales



Full time equivalent jobs



Number of establishments per region



Source : ViaAqua and Protéis for FranceAgriMer

• Trading firms

Trading firms in 2021

Number of firms ⁽²⁾



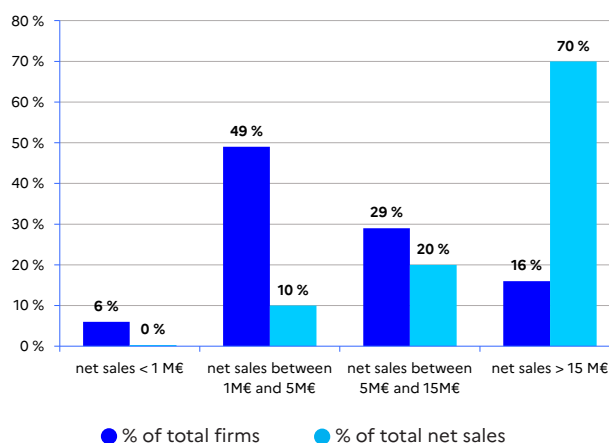
Jobs ⁽²⁾



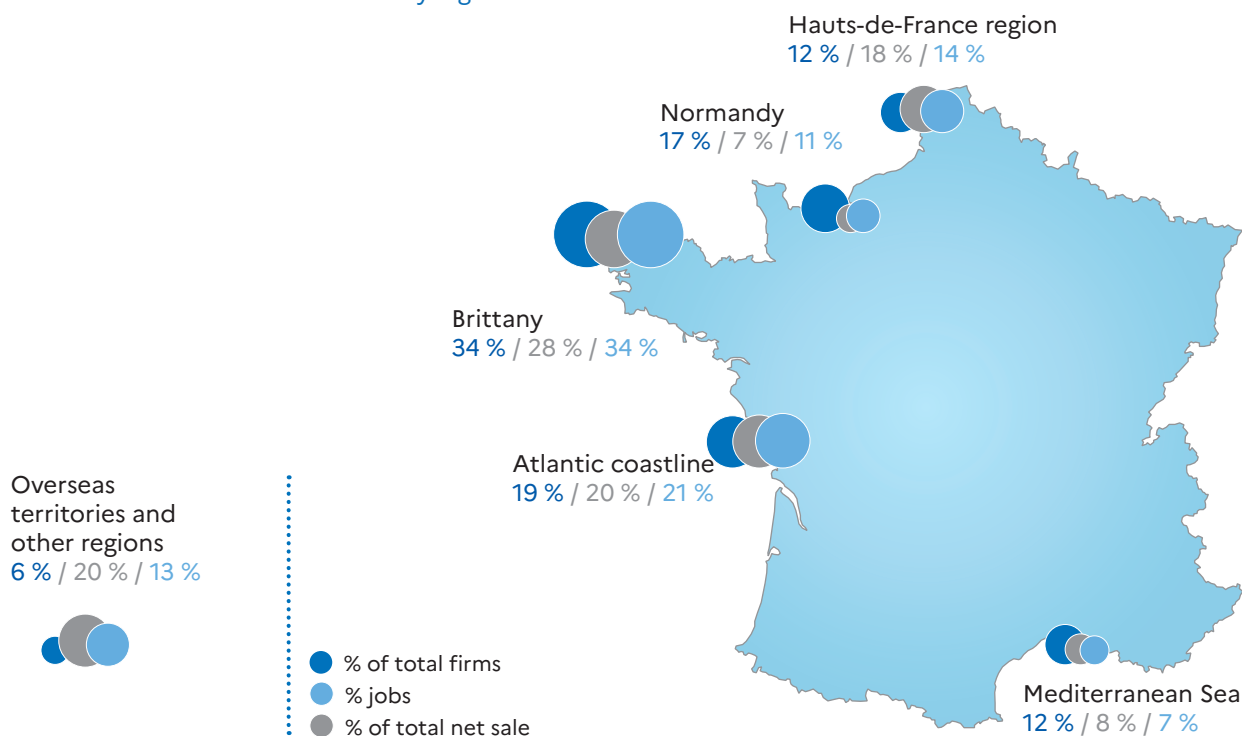
Net sales (million euros) ⁽²⁾



Breakdown of firms by total net sales



Breakdown of firms and total net sales by region



Source : FranceAgriMer according to Banque de France Aysel barometer

(1) Fish trading companies in the traditional sense of the term, excluding fish merchants-processors

(2) Estimations 2016

Processing main activity firms



FIRMS

Processing main activity firms in 2018

Number of firms



Net sales per firm (million euros) ⁽¹⁾



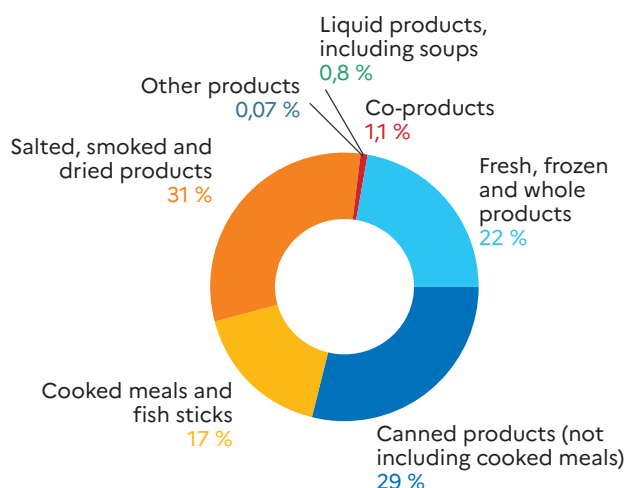
including seafood and fish farming processing



Jobs



Seafood processing net sales ⁽³⁾

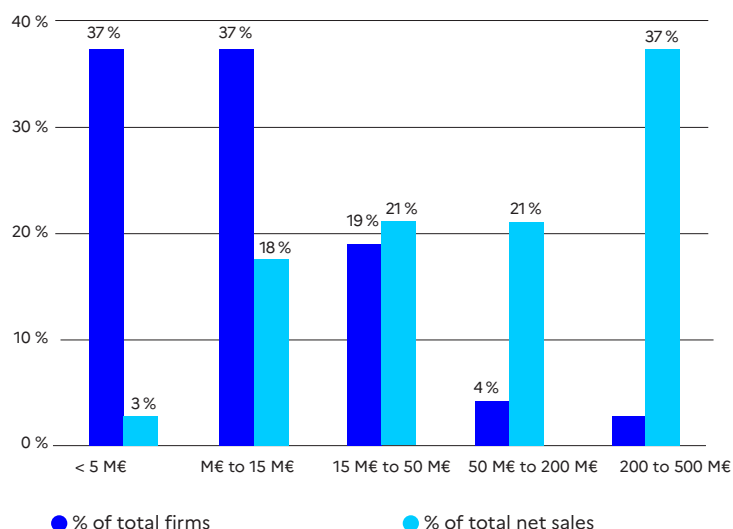


(1) Filleting, cutting, peeling, packaging, surgelation

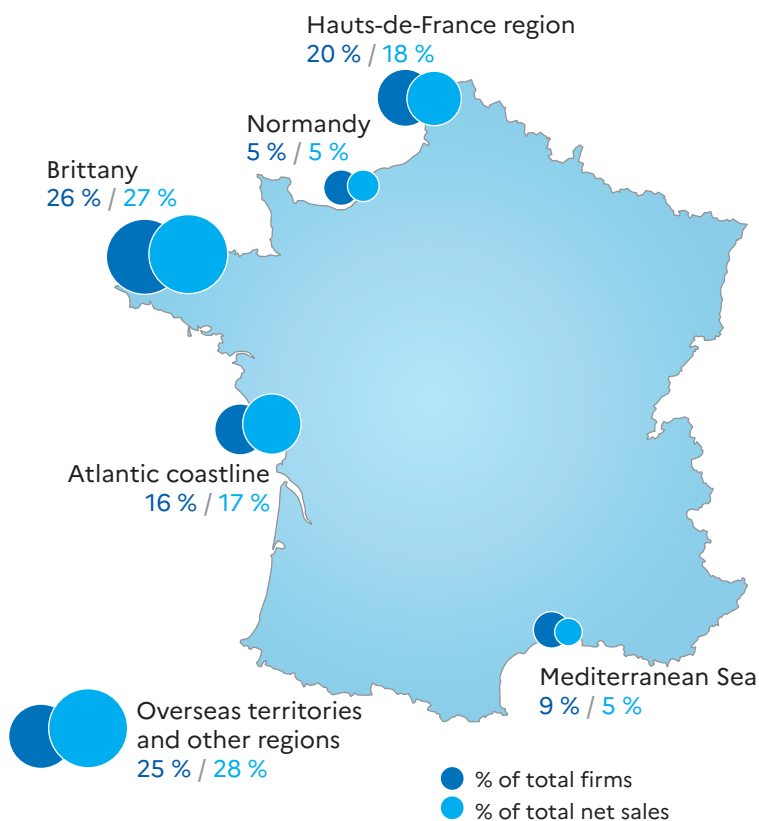
(2) Seaweeds, in fish products, others

(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



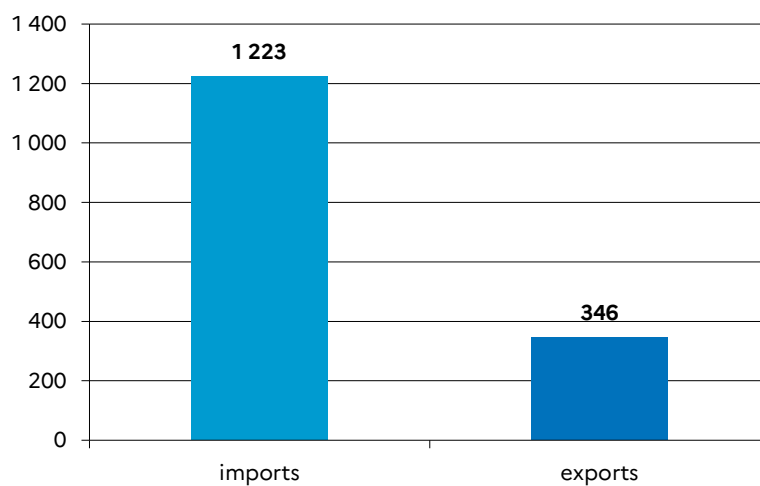
• Supply balance



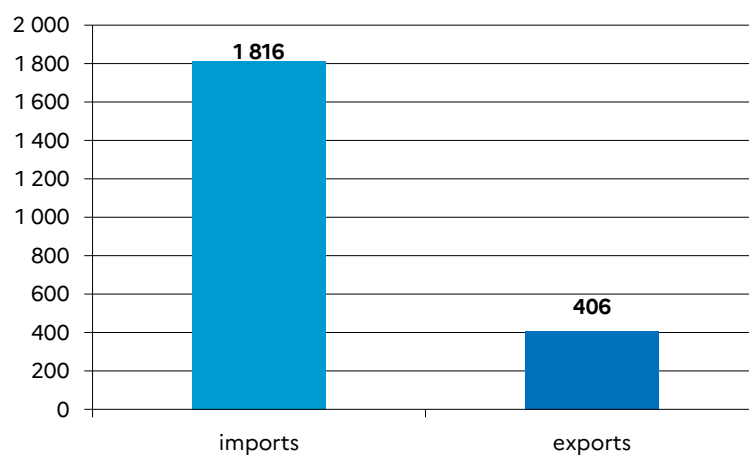
TRADE

Supply balance in 2023

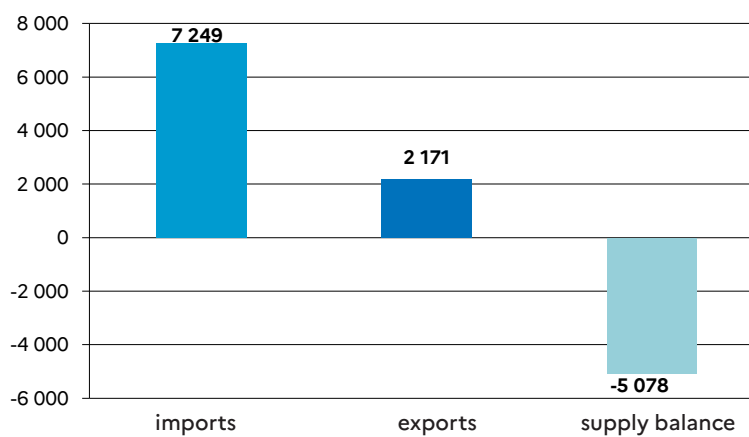
Net weight (1 000 tons)



Live weight (1 000 tons)



Value (million euros)

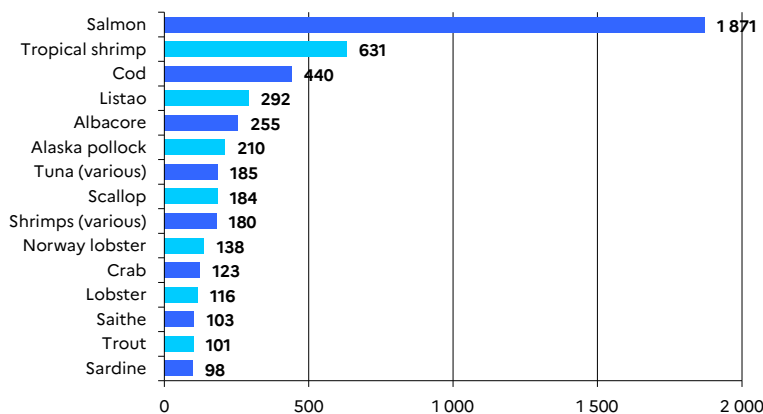


Source : French customs

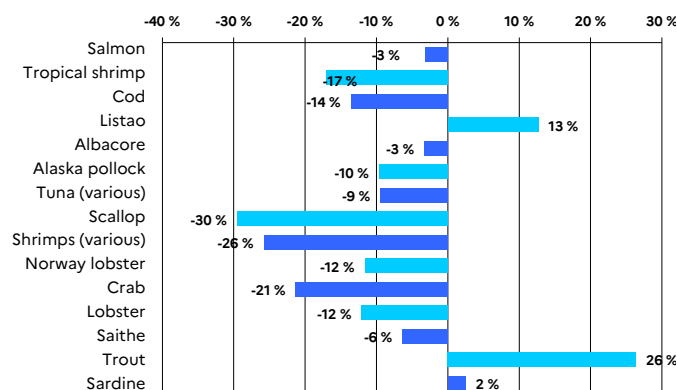
• Imports and exports / metropolitan France and overseas territories

Imports - main species in 2023

Value (million euros)

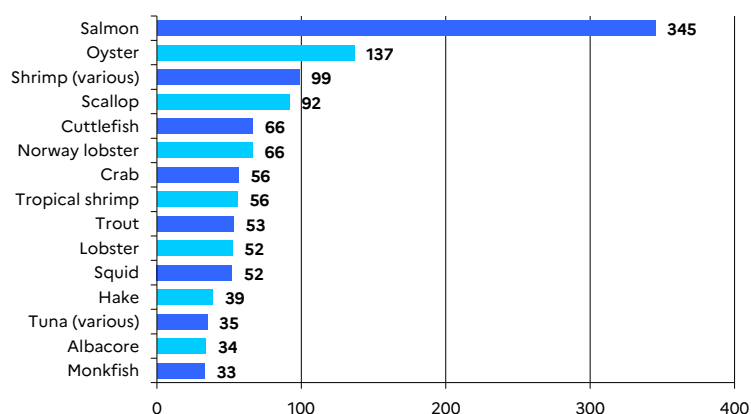


Evolution 2023/22 (en %)

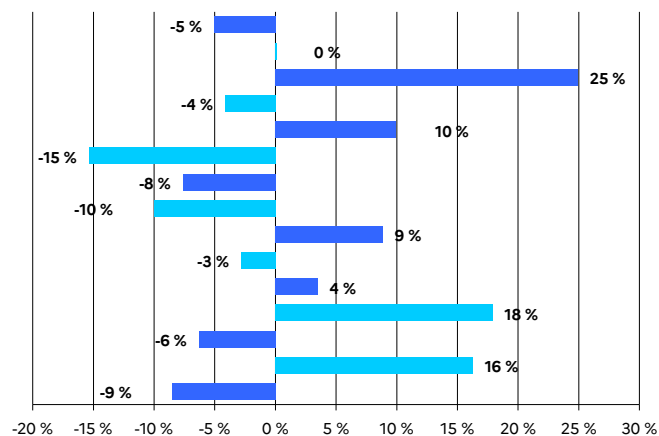


Exports - main species in 2023

Value (million euros)



Evolution 2023/22 (en %)



Source : French customs

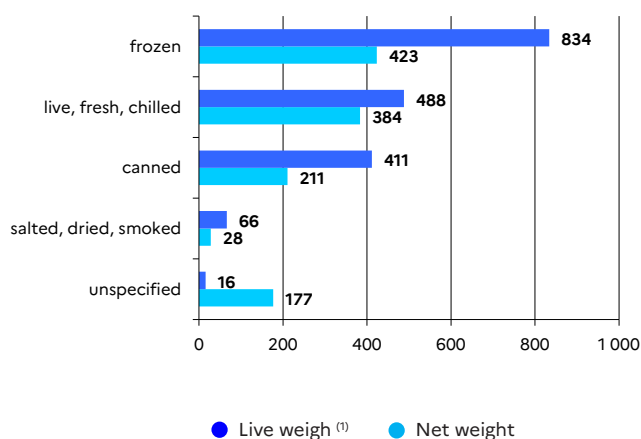
Imports and exports / metropolitan France and overseas territories



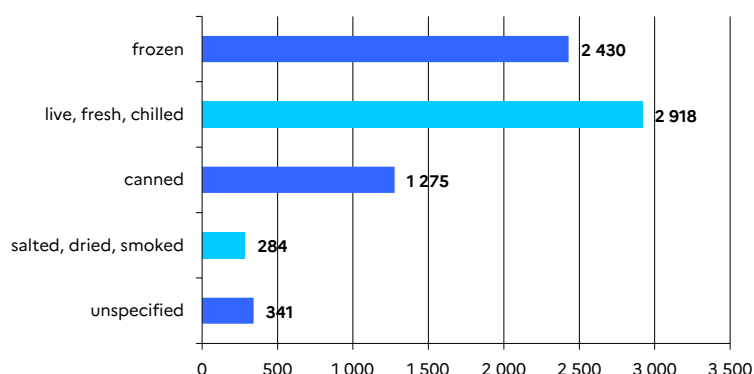
TRADE

Imports by presentation in 2023

Imports by volume (1 000 tons)

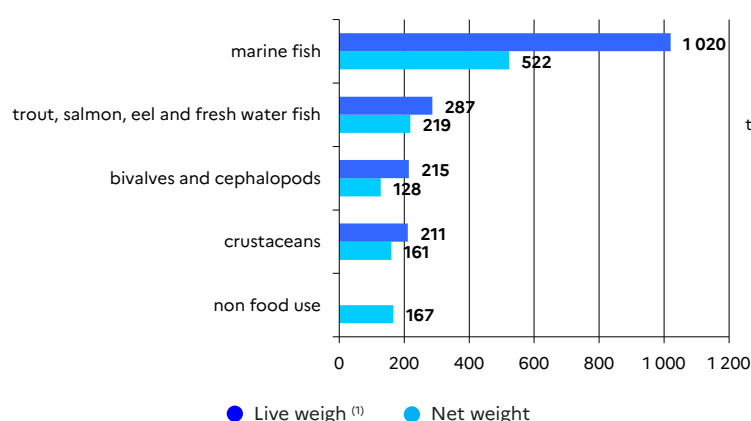


Imports by value (million euros)

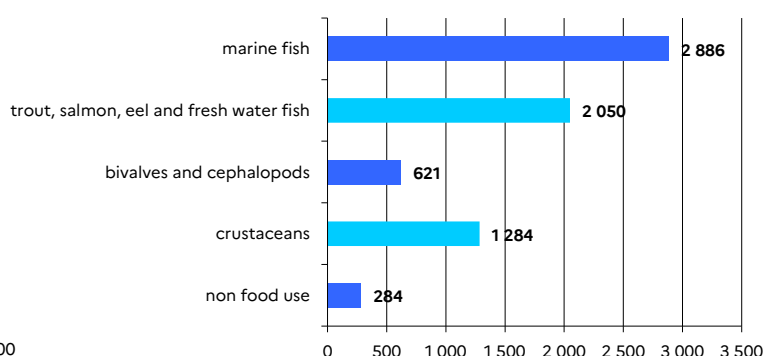


Imports by species group in 2023

Imports by volume (1 000 tons)



Imports by value (million euros)



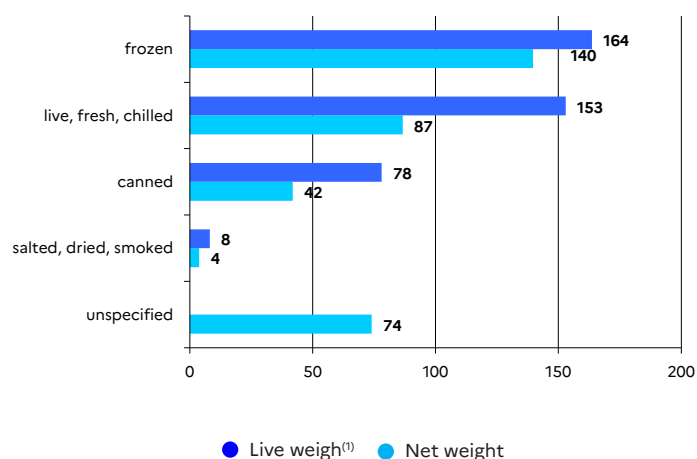
(1) Data collection methodology is detailed on inside back cover

Source : French customs

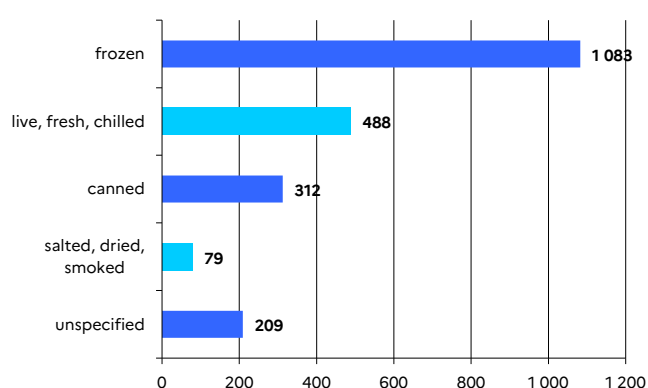
• Imports and exports / metropolitan France and overseas territories

Exports by presentation in 2023

Exports by volume (1 000 tons)

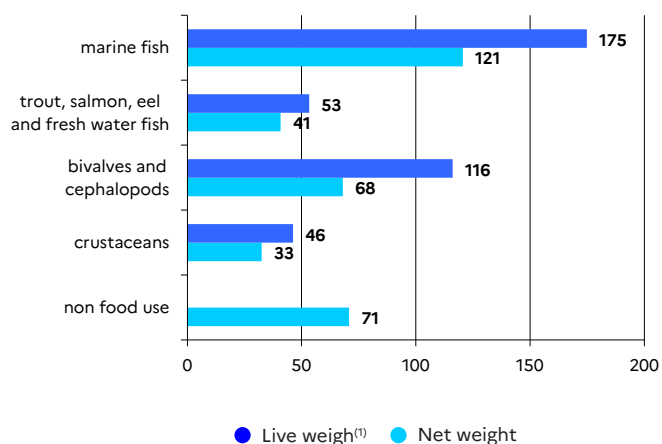


Exports by value (million euros)

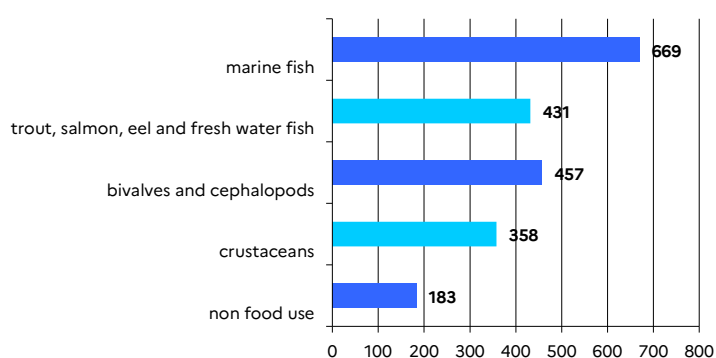


Exports by species group in 2023

Exports by volume (1 000 tons)



Exports by value (million euros)



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

Source : French customs

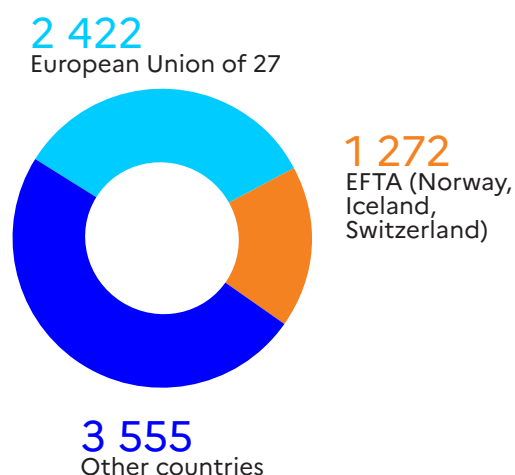
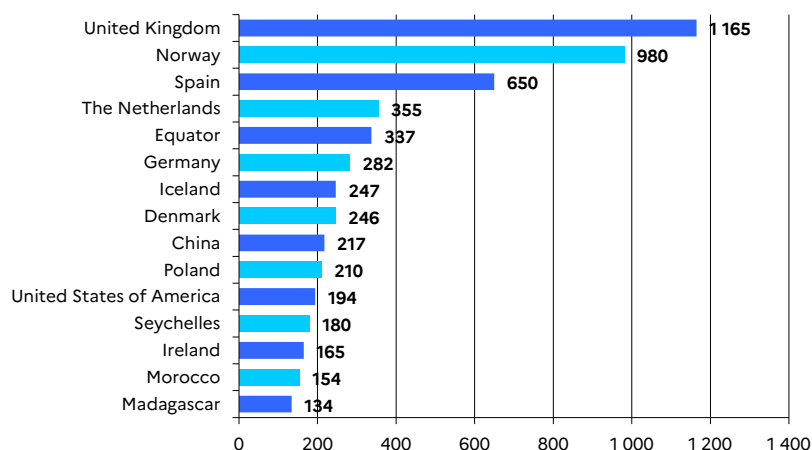
• Imports and exports / metropolitan France and overseas territories



TRADE

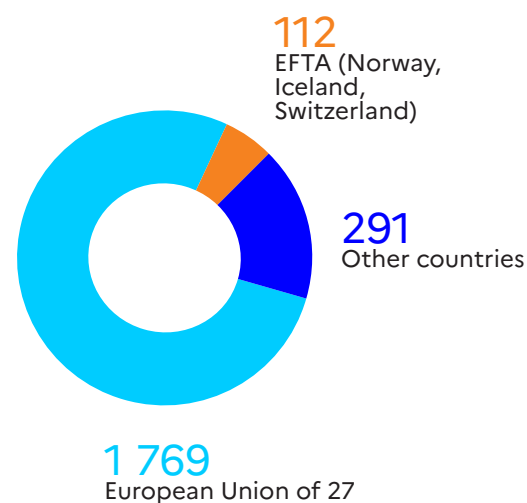
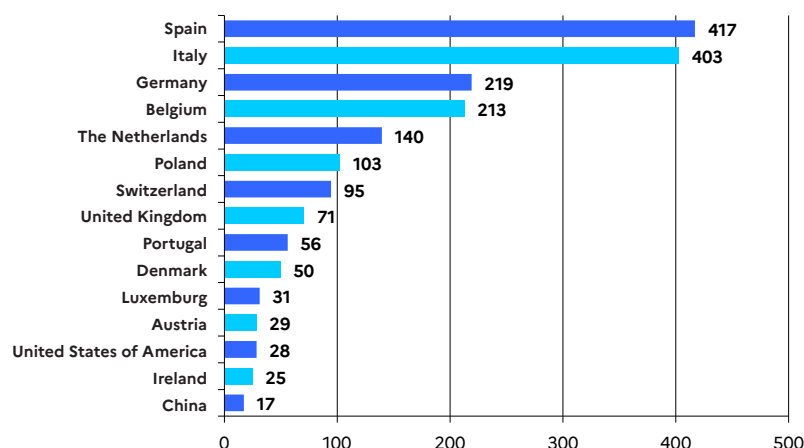
Imports of aquatic products by geographical origin in 2023

Value (millions euros)



Exports of aquatic products by destination in 2023

Value (million euros)



Source : French customs



CONSUMPTION

SUPPLY BALANCE / PURCHASES

Households / Catering / Breakdown of purchases by distribution channel

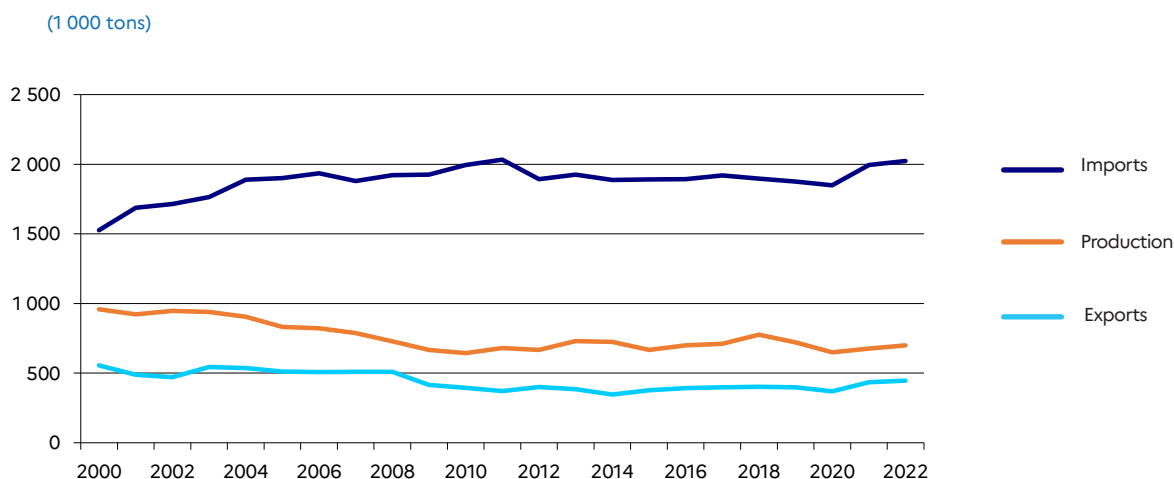


• Supply balance



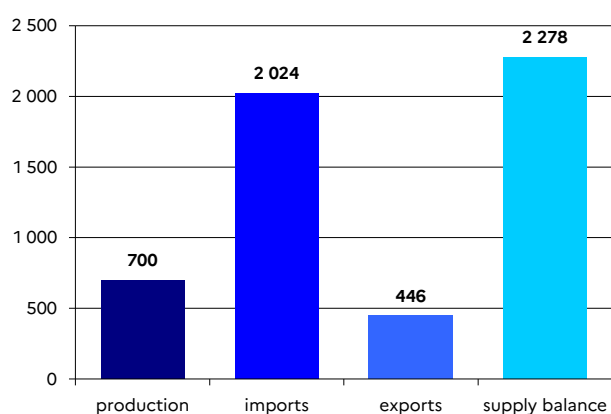
CONSUMPTION

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

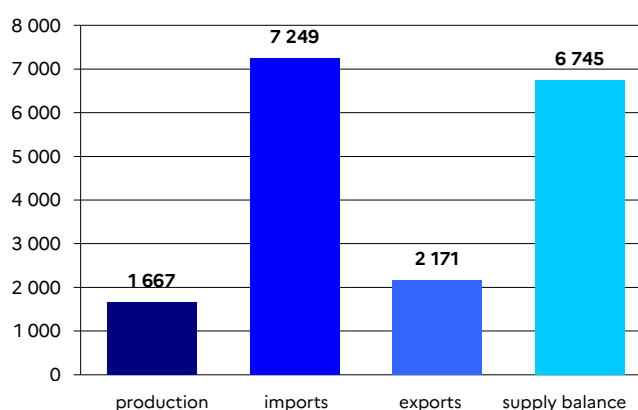


Supply balance in 2022

In volume (1 000 tons)



In value (million euros)

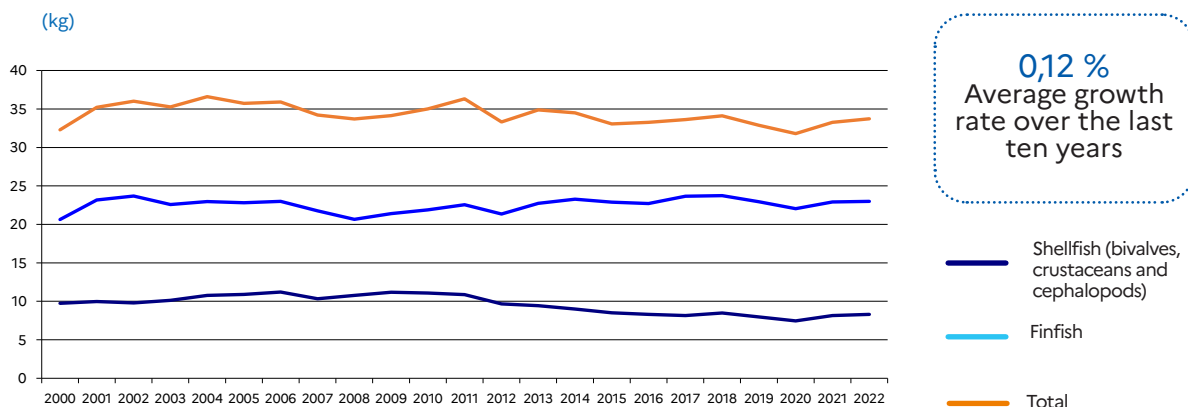


- (1) Data collection methodology is detailed on inside back cover
 (2) Live weight, all products excepting non-food products and algae
 (3) Be careful, sales of French boats are not exhaustive

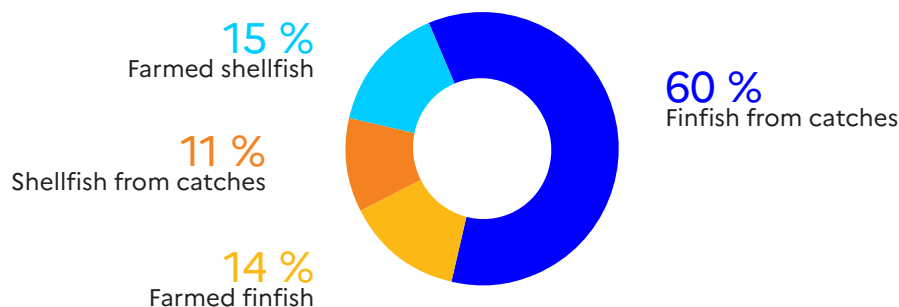
Source: FranceAgriMer

• Supply balance

Changes in supply balance ⁽¹⁾ ⁽²⁾ ⁽³⁾

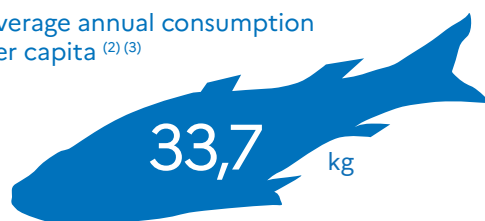


Breakdown by products in 2022 ⁽¹⁾ ⁽²⁾



Average annual consumption per capita ⁽²⁾ ⁽³⁾ (kg)	33,7
Fish farming	4,6
Salmon	3,8
Farmed shellfish and finfish	4,9
Mussel	1,9
Oyster	1,1
Shrimp	1,5
Finfish and shellfish from catches ⁽⁴⁾	3,3
Scallop	0,9
Fish from catches	19,4
Tuna	4,9
Cod	2,1
Alaska pollock	2,3
Sardine	1,0
Hake	0,9
Herring	0,6
Mackerel	0,7
Saithe	0,7
Monkfish	0,4

Average annual consumption per capita ⁽²⁾ ⁽³⁾



Following changes in the scope of the data used to construct the supply balance sheet, data presented in this document have undergone significant variations over the last two years. Only the figures presented from the 2023 edition are now authentic. The supply report below, which was until now limited to a selection of species, now covers all aquatic products, algae and non-food products.

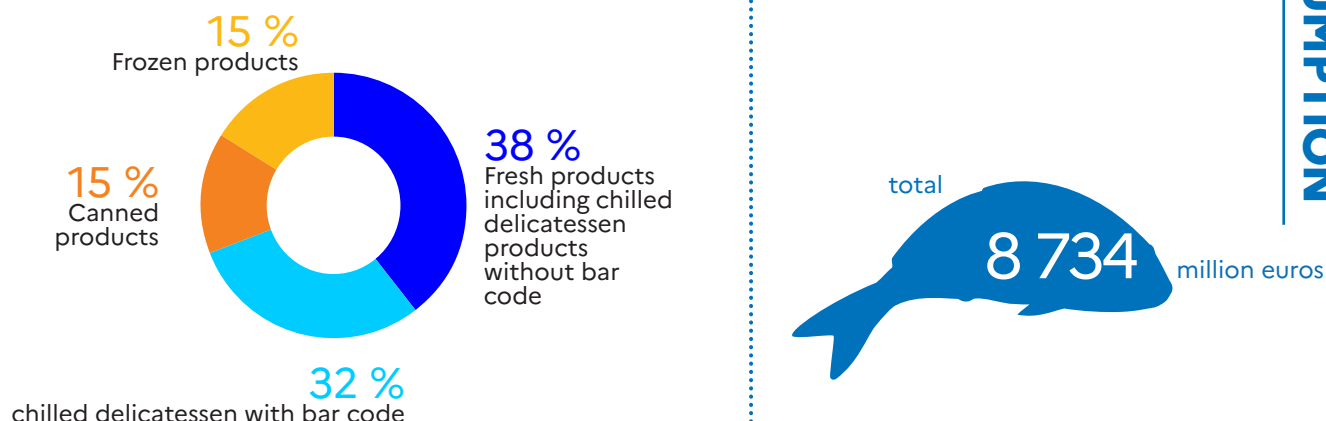
(1) Data collection methodology is detailed on inside back cover
 (2) Equivalent live weight
 (3) Excepting seaweed and non-food use products
 (4) Crustaceans include cephalopods

• Households purchases

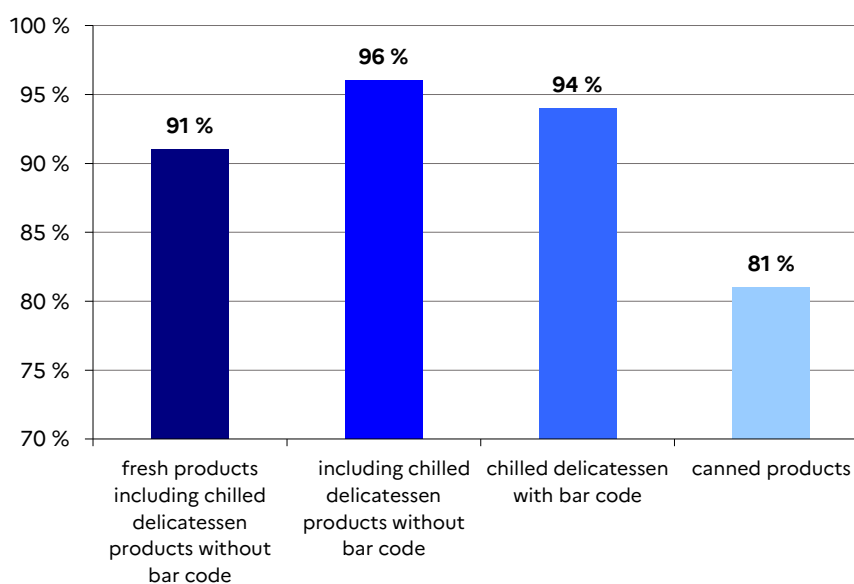


CONSUMPTION

Households spending for aquatic products in 2023 ⁽¹⁾



Percentage of purchasing households in 2023 ⁽²⁾



Households consumption over 10 years

	2013		2023		Evolution	
	Volumes (in thousands of tons)	Spendings (in thousands of €)	Volumes (in thousands of tons)	Spendings (in thousands of €)	Volumes	Values
Fresh products	232 525	2 362 369	265 679	3 345 288	14%	42%
Frozen products	179 659	2 236 289	172 914	2 766 957	-4%	24%
Canned products	121 001	1 057 057	119 060	1 310 493	-2%	24%
Chilled delicatessen	144 524	1 429 553	106 735	1 310 772	-26%	-8%

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

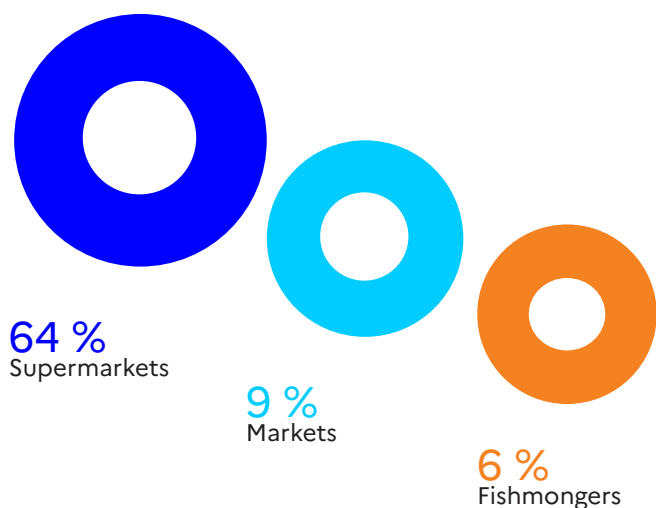
(2) A purchasing households buys the product at least once a year

Source : FranceAgriMer from Kantar Worldpanel

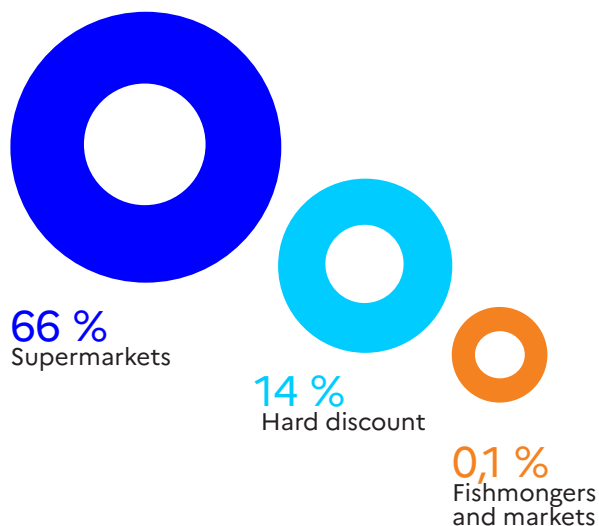
• Households purchases

Purchases of aquatic products by french households for home consumption in 2023 ⁽¹⁾

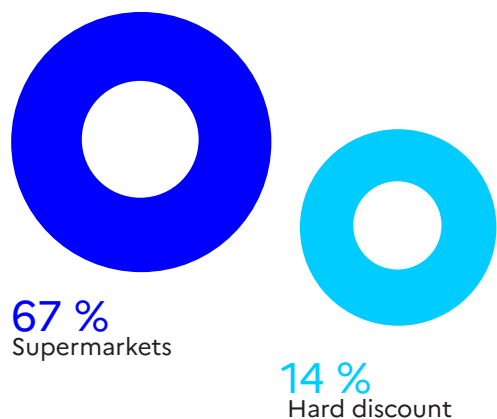
Fresh products



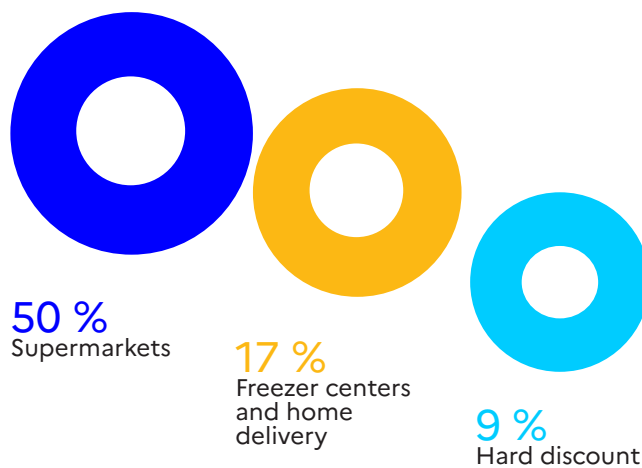
Chilled delicatessen



Canned products



Frozen products



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

Source : FranceAgriMer from Kantar Worldpanel

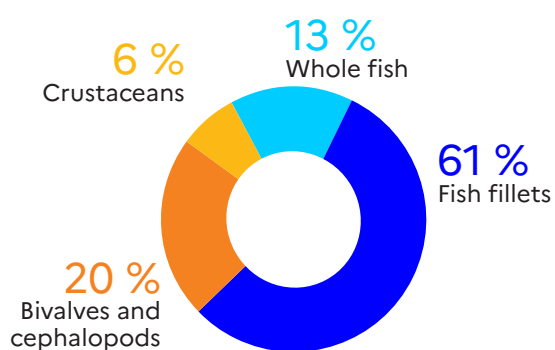
• Households purchases



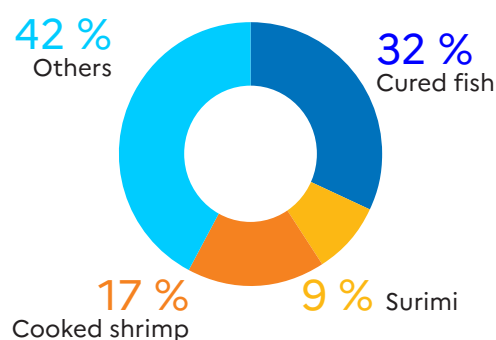
CONSUMPTION

Breakdown of expenditures by presentation and species group in 2023 ⁽¹⁾

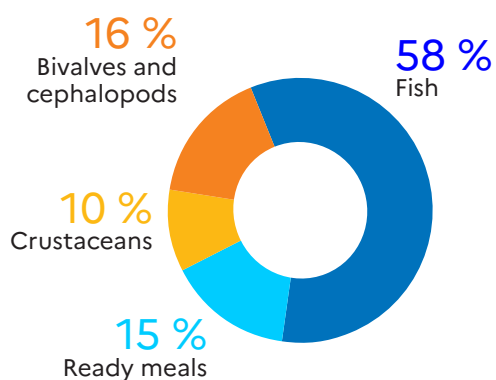
Fresh products



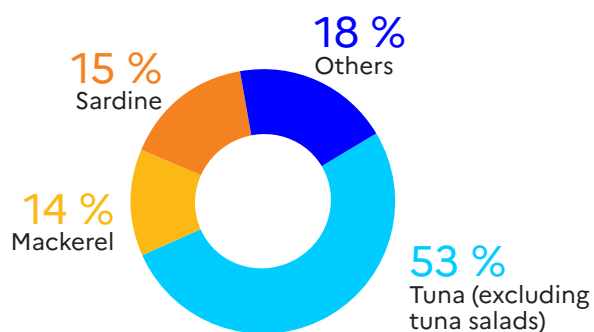
Chilled delicatessen



Frozen products



Canned products



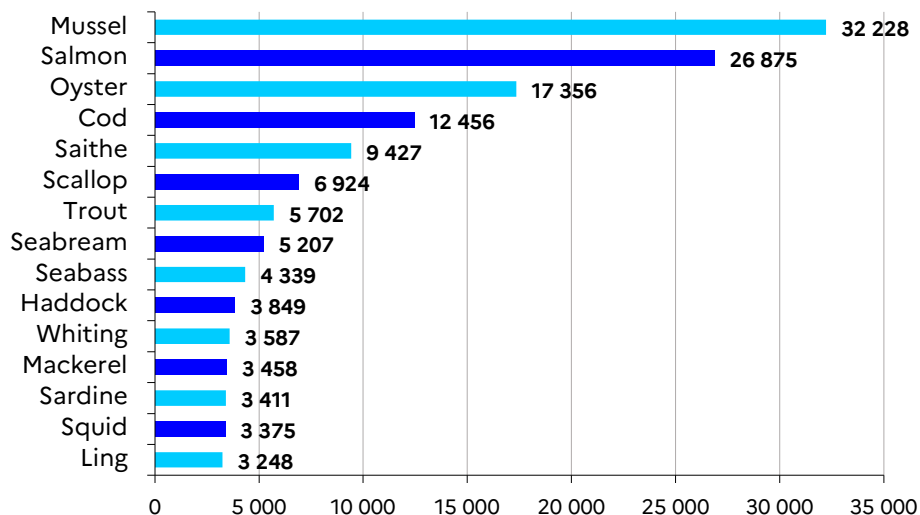
(1) Data collection methodology is detailed on inside back cover

Source : FranceAgriMer from Kantar Worldpanel

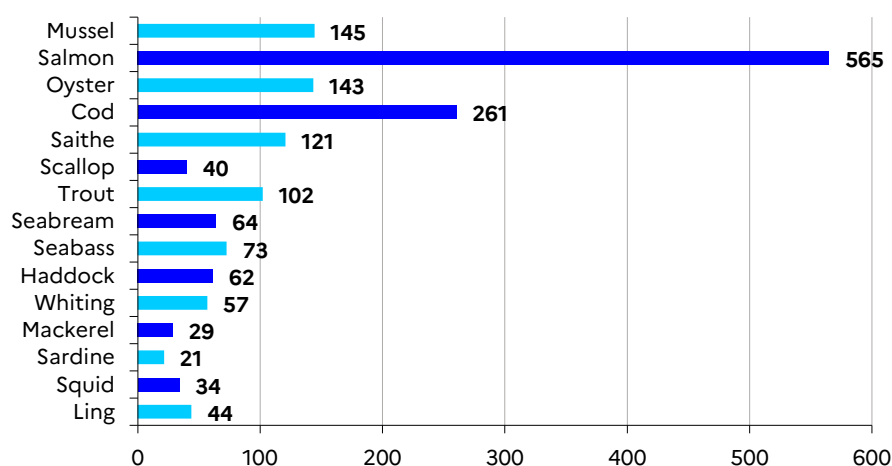
• Households purchases

Main species purchased fresh in 2023 ⁽¹⁾

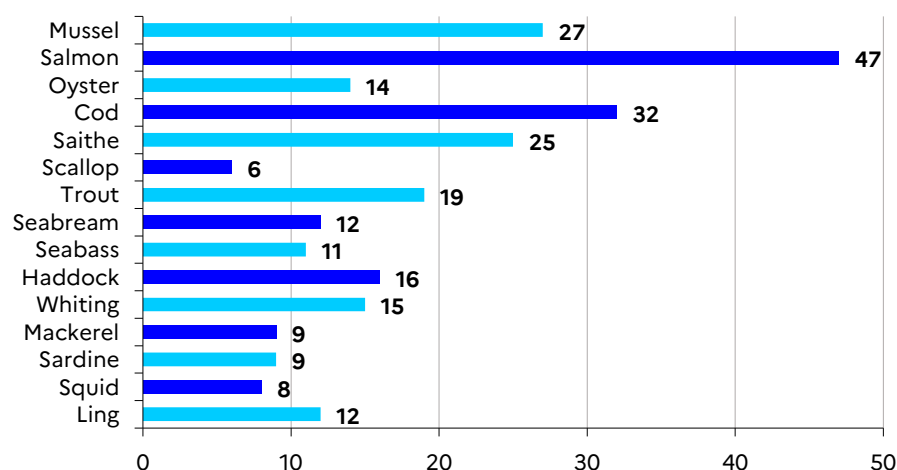
Tons ⁽²⁾



Million euros



Percentage of purchasing households (%)



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

(2) Net weight

Source : FranceAgriMer from Kantar Worldpanel

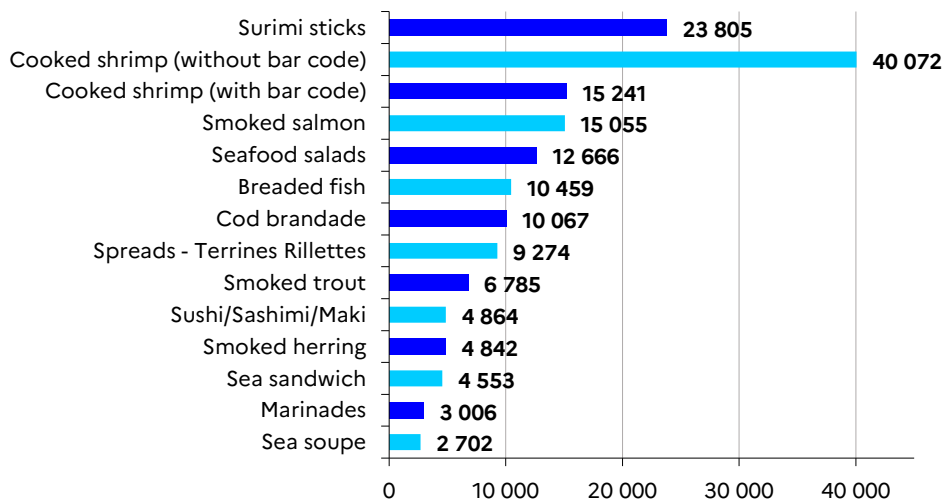
• Households purchases



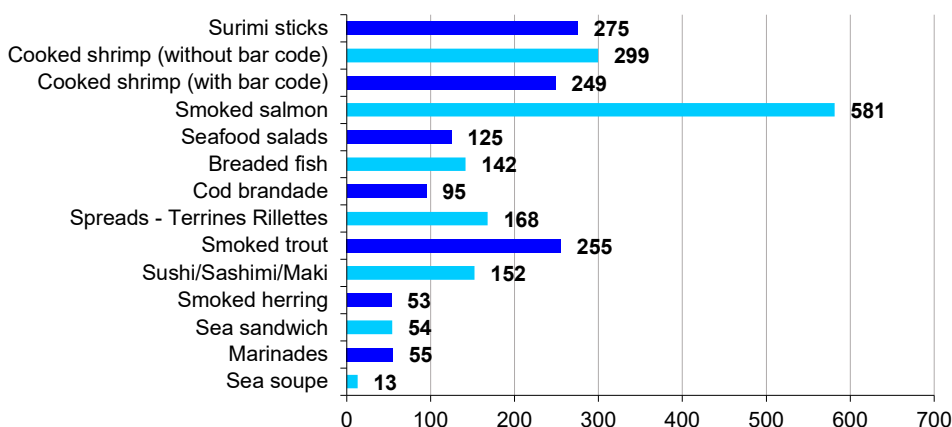
CONSUMPTION

Main products purchased for chilled delicatessen in 2023 ⁽¹⁾⁽²⁾

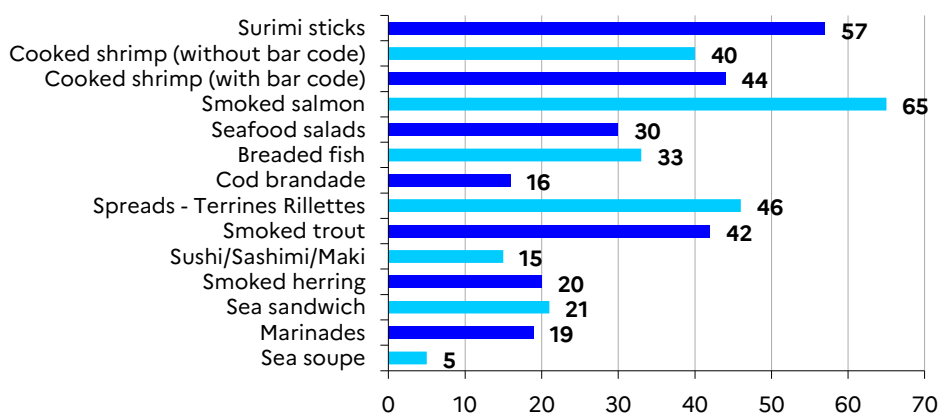
Tons ⁽³⁾



Million euros



Percentage of purchasing households (%)



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

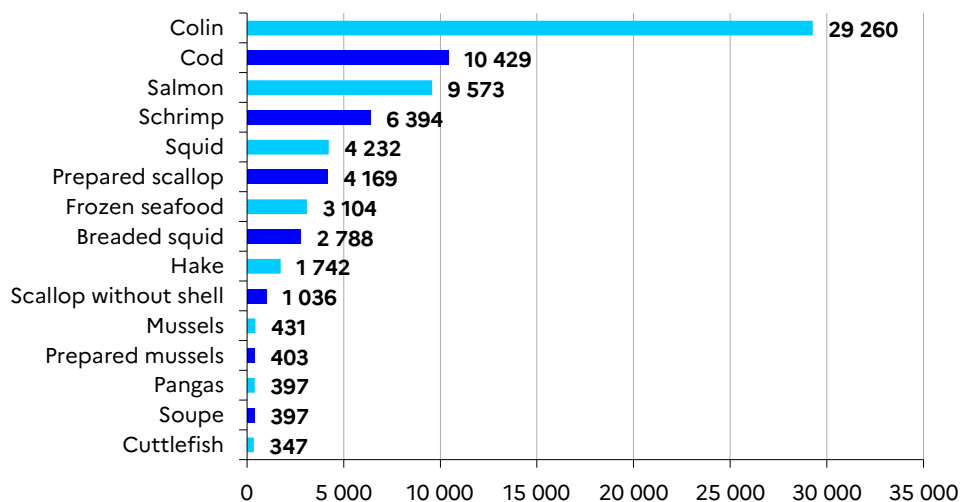
(2) Products with bar code, unless specified

(3) Net weight

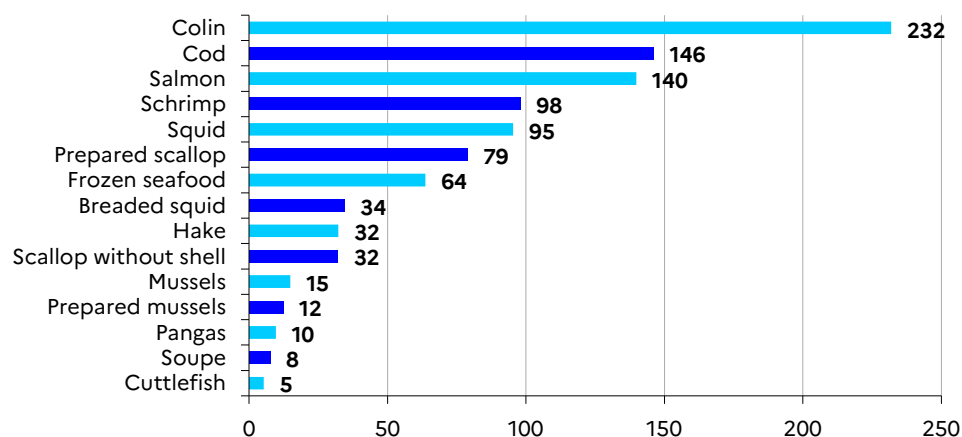
• Households purchases

Main species purchased as frozen products in 2023 ⁽¹⁾

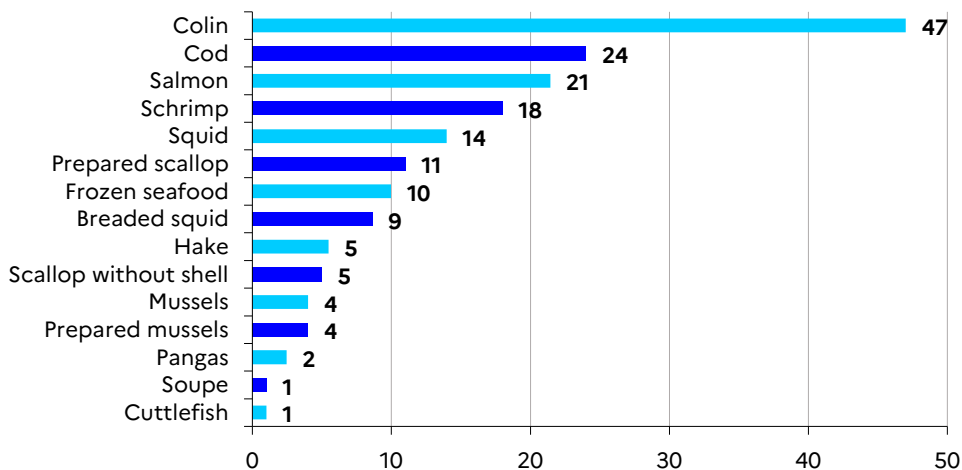
Tons ⁽²⁾



Million euros



Percentage of purchasing households (%)



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

(2) Net weight

Source : FranceAgriMer from Kantar Worldpanel

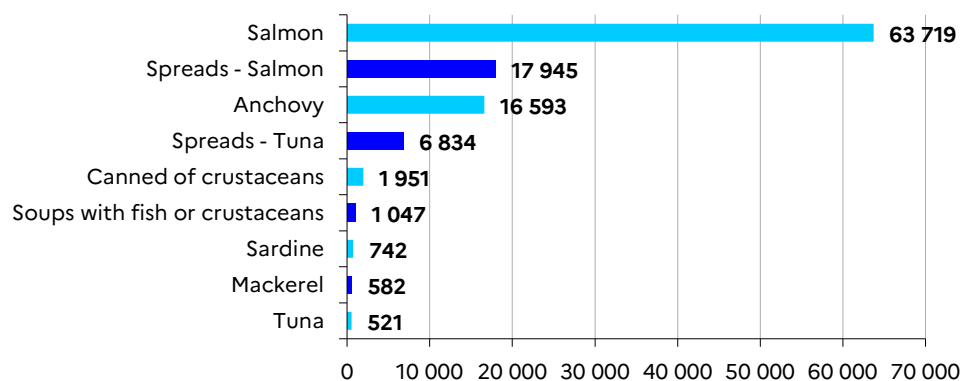
• Households purchases



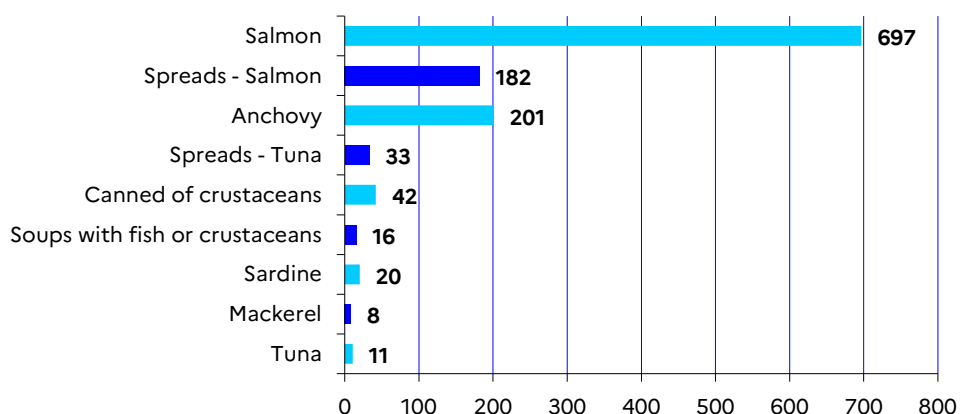
CONSUMPTION

Main species purchased in canned products in 2023 ⁽¹⁾

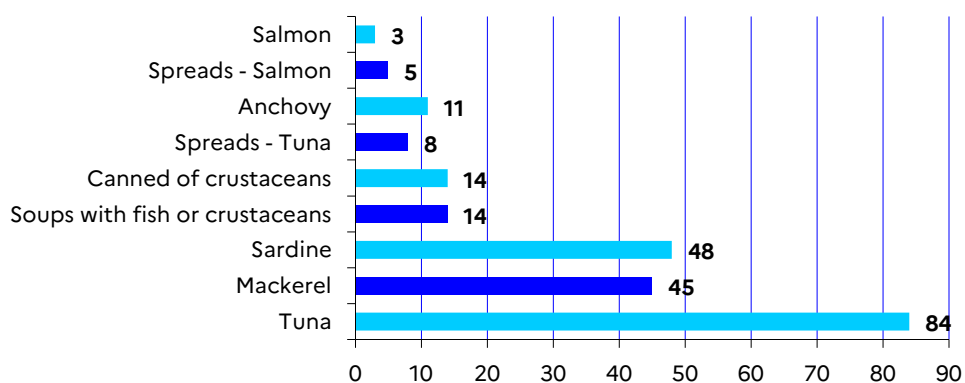
Tons ⁽²⁾



Million euros



Percentage of purchasing households (%)



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

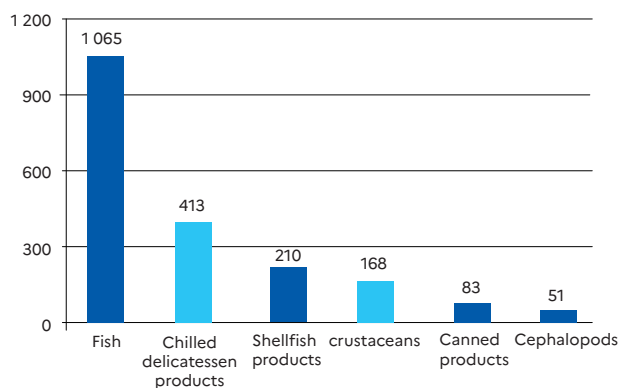
(2) Net weight

Source : FranceAgriMer from Kantar Worldpanel

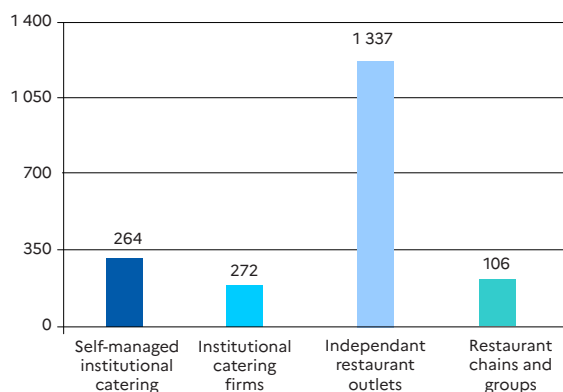
- Catering purchases**

Spendings for the catering sector in 2019

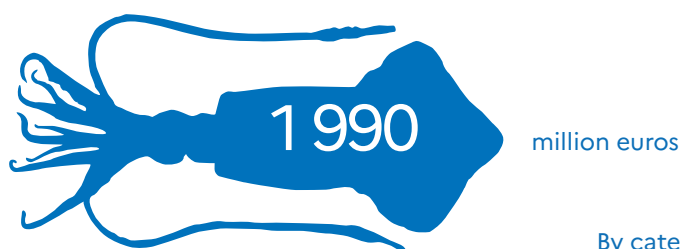
By kind of product (million euros)



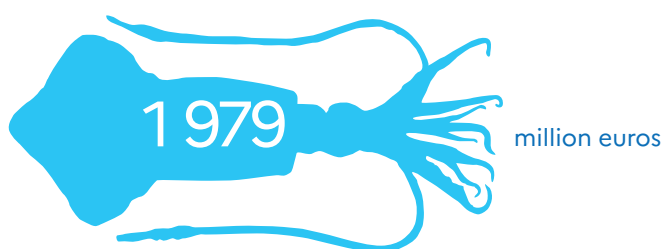
By catering outlet (million euros)



By kind of product



By catering outlet



Source: FranceAgriMer from Circana (now from IRI)

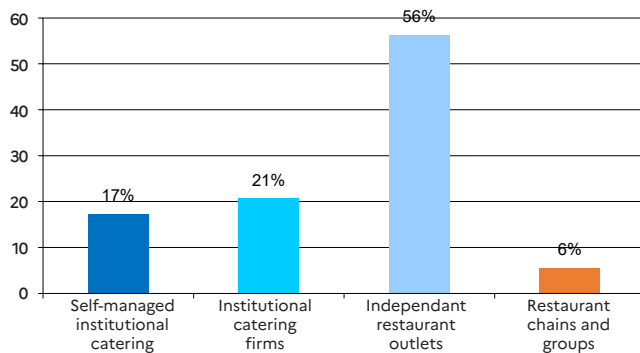
• Catering purchases



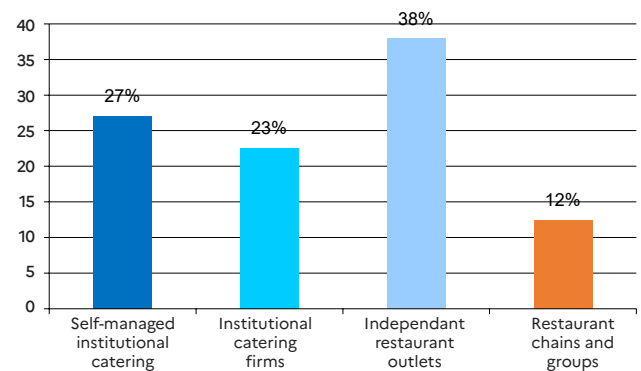
CONSUMPTION

Purchases in volume by kind of products in 2019

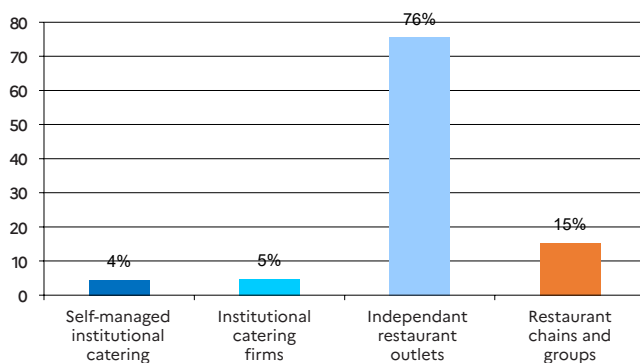
Fish products (%)



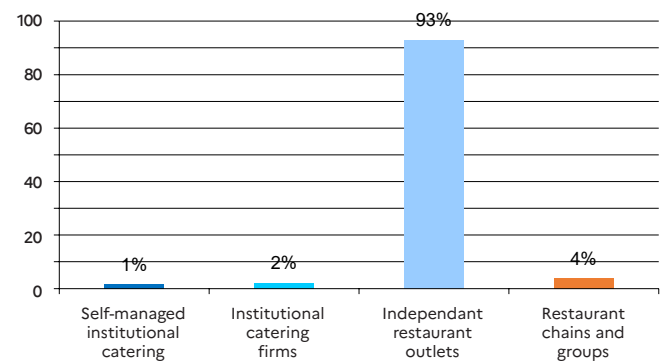
Chilled delicatessen products (%)



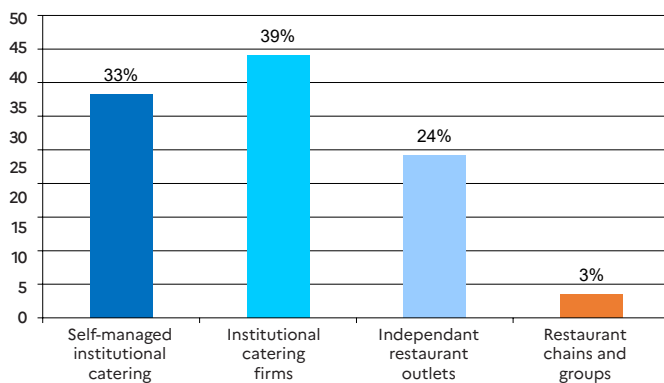
Shellfish products (%)



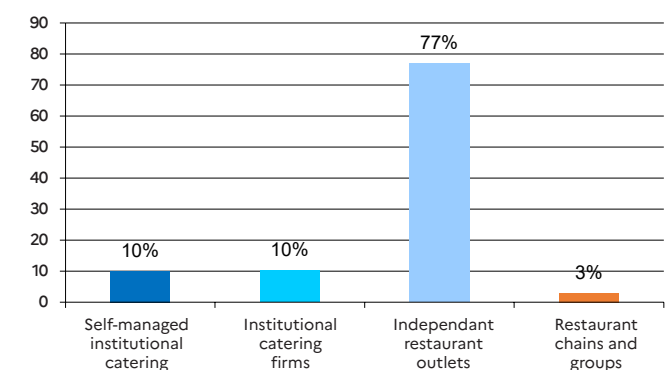
Crustaceans (%)



Canned products (%)



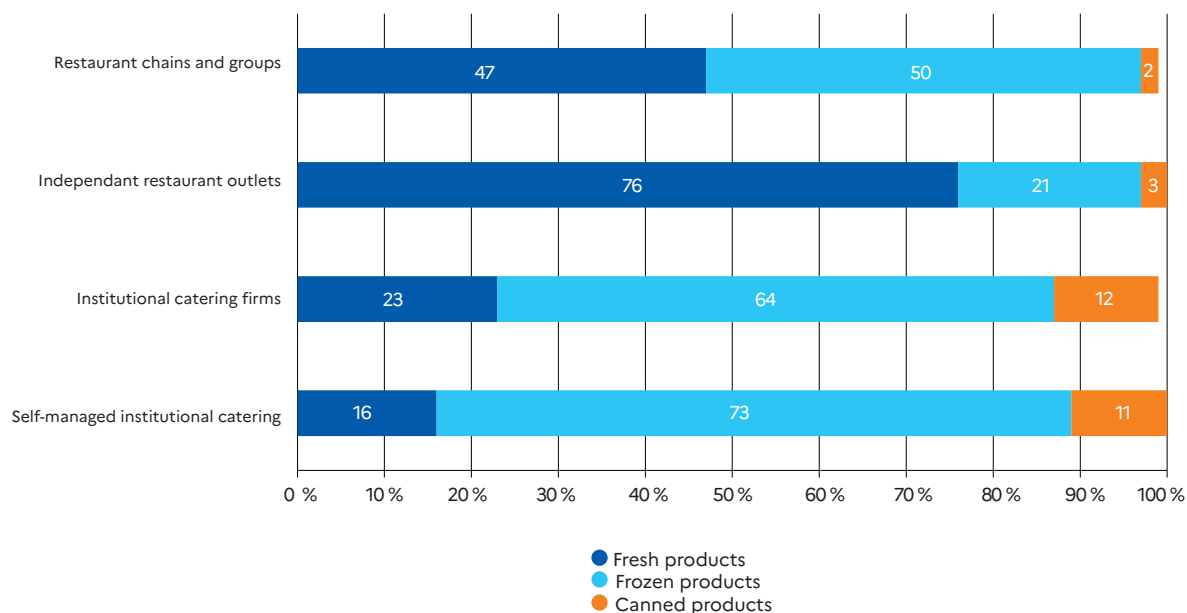
Cephalopods (%)



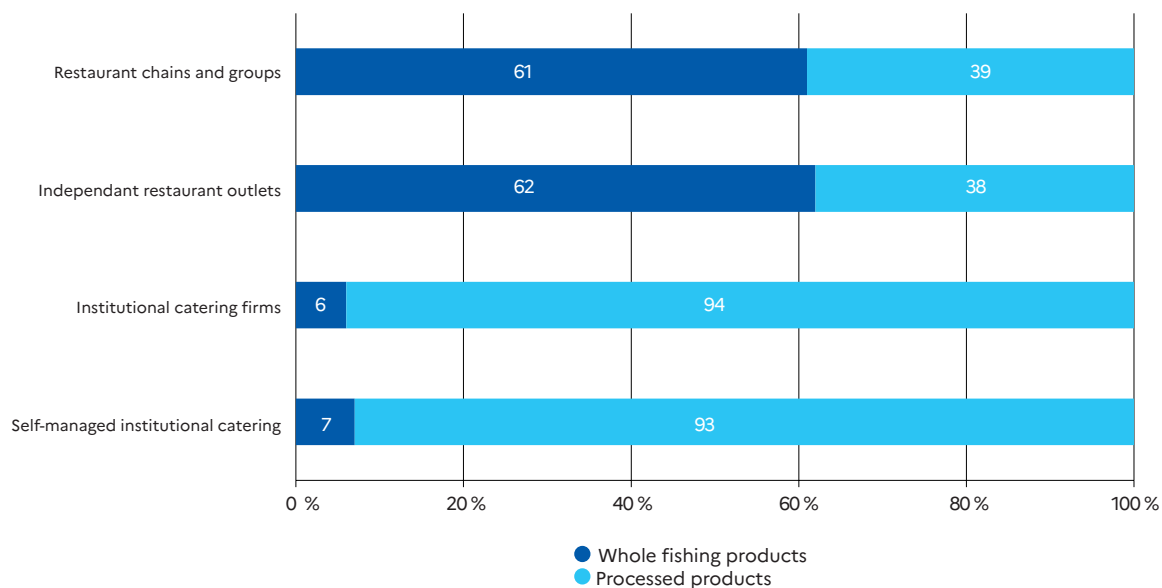
Source: FranceAgriMer from Circana (now from IRI)

• 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

Import and export data comes from French customs. The quantities can be expressed in live weight equivalent, that is to say before any transformation of the product, thanks to conversion coefficients established for each nomenclature line. The coefficients used are those documented by Eumofa at the following link :

<https://www.eumofa.eu/fr/supply-balance-and-other-methodologies>

Processing

Processing firms data arise from a survey carried out in 2019 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 2023 of sales reported in tide halls
- FranceAgriMer Annual report 2023 of foreign trade in fishery products and aquaculture*
- FranceAgriMer Annual report 2023 on the consumption of fishery products and aquaculture*

**coming 2024*

VISIOMer inter-channel and off-the-shelf network sales data

MASA Ministry of Agriculture and Food Sovereignty

DGAMPA General Directorate of Maritime Affairs, Fisheries and Aquaculture

Ifremer Research Institute for the Exploitation of the Sea

DATA



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