The fisheries and aquaculture sector in France

Edition: April 2015

Production
Firms
Trade
Consumption

Les cahiers de FranceAgriMer
Production

fishing fleet
aquaculture firms / jobs

total sales of fisheries and aquaculture products
France in the EU-28 and in the world in 2012

**Quantities sold in 2012/13** (1)(2)  
by method of production (tons) (3)

- Total: 665,000 tons
- 160,000 shellfish farming
- 45,000 fish farming (5)
- Fresh and frozen landings (4): 460,000

**Value of sales in 2012/13** (1)(2)  
by method of production (million euros)

- Total: 1,803 million euros
- 546 shellfish farming
- 1,095 fresh and frozen landings (4)
- 162 fish farming (5)

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(1) excluding seaweeds - (2) data 2013 for fishing and 2013 for fish farming - (3) equivalent live weight - (4) sales, sales to processing industry and export sales - (5) including farmed crustaceans 

Source: MEDEF / IFREMER / IFREMER
Total sales / metropolitan France and overseas territories

Changes in quantities sold in metropolitan France\(^{(1)}\)(\(2\))

<table>
<thead>
<tr>
<th>Year</th>
<th>Fresh and Frozen Landings</th>
<th>Shellfish Farming</th>
<th>Fish Farming</th>
</tr>
</thead>
<tbody>
<tr>
<td>1997</td>
<td>600</td>
<td>200</td>
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</tr>
<tr>
<td>1998</td>
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</tr>
<tr>
<td>2013</td>
<td>600</td>
<td>200</td>
<td>200</td>
</tr>
</tbody>
</table>

Main species sold\(^{(2)}\)(\(3\))(\(4\))

<table>
<thead>
<tr>
<th>Species</th>
<th>2012 (tons)</th>
<th>2013 (tons)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oyster</td>
<td>80,400</td>
<td>77,100</td>
</tr>
<tr>
<td>Tuna</td>
<td>79,300</td>
<td>74,000</td>
</tr>
<tr>
<td>Mussel</td>
<td>32,300</td>
<td>31,600</td>
</tr>
<tr>
<td>Hake</td>
<td>30,100</td>
<td>29,500</td>
</tr>
<tr>
<td>Trout</td>
<td>27,500</td>
<td>27,000</td>
</tr>
<tr>
<td>Herring</td>
<td>26,500</td>
<td>26,000</td>
</tr>
<tr>
<td>Scallop</td>
<td>23,400</td>
<td>23,000</td>
</tr>
<tr>
<td>Sardine</td>
<td>21,000</td>
<td>19,500</td>
</tr>
<tr>
<td>Cod</td>
<td>16,000</td>
<td>15,000</td>
</tr>
<tr>
<td>Whelk</td>
<td>11,000</td>
<td>10,500</td>
</tr>
<tr>
<td>Cuttlefish</td>
<td>7,500</td>
<td>7,000</td>
</tr>
<tr>
<td>Whiting</td>
<td>10,000</td>
<td>9,500</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Species</th>
<th>2012 (Euros)</th>
<th>2013 (Euros)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oyster</td>
<td>397</td>
<td>365</td>
</tr>
<tr>
<td>Mussel</td>
<td>357</td>
<td>325</td>
</tr>
<tr>
<td>Tuna</td>
<td>139</td>
<td>127</td>
</tr>
<tr>
<td>Monkfish</td>
<td>108</td>
<td>96</td>
</tr>
<tr>
<td>Sole</td>
<td>86</td>
<td>74</td>
</tr>
<tr>
<td>Hake</td>
<td>76</td>
<td>62</td>
</tr>
<tr>
<td>Scallop</td>
<td>57</td>
<td>48</td>
</tr>
<tr>
<td>Seabass</td>
<td>57</td>
<td>48</td>
</tr>
<tr>
<td>Cod</td>
<td>36</td>
<td>32</td>
</tr>
<tr>
<td>Norway lobster</td>
<td>32</td>
<td>28</td>
</tr>
<tr>
<td>Cuttlefish</td>
<td>28</td>
<td>25</td>
</tr>
<tr>
<td>Squid</td>
<td>27</td>
<td>25</td>
</tr>
<tr>
<td>Mackerel</td>
<td>25</td>
<td>23</td>
</tr>
<tr>
<td>Sardine</td>
<td>21</td>
<td>19</td>
</tr>
</tbody>
</table>

\(^{(1)}\) excluding seaweeds  
\(^{(2)}\) data 2013 for fishing and 2012 for fish farming  
\(^{(3)}\) equivalent live weight  
\(^{(4)}\) sales, sales to processing industry and export sales  
\(^{(5)}\) including farmed crustaceans  
Source: MEDDE / DPMA / BSPA
Fresh and frozen landings in 2013⁽¹⁾

Sales

<table>
<thead>
<tr>
<th>Region</th>
<th>Sales Value (millions of euros)</th>
<th>Quantity (tons)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bretagne</td>
<td>351 M€</td>
<td>208 000 t</td>
</tr>
<tr>
<td>Haute-Normandie</td>
<td>48 M€</td>
<td>20 100 t</td>
</tr>
<tr>
<td>Basse-Normandie</td>
<td>101 M€</td>
<td>45 200 t</td>
</tr>
<tr>
<td>Nord - Pas-de-Calais</td>
<td>62 M€</td>
<td>30 300 t</td>
</tr>
<tr>
<td>Poitou-Charentes</td>
<td>52 M€</td>
<td>9 800 t</td>
</tr>
<tr>
<td>Aquitaine</td>
<td>33 M€</td>
<td>8 100 t</td>
</tr>
<tr>
<td>Pays de la Loire</td>
<td>104 M€</td>
<td>29 100 t</td>
</tr>
<tr>
<td>Languedoc-Roussillon</td>
<td>33 M€</td>
<td>12 000 t</td>
</tr>
<tr>
<td>Corse</td>
<td>6 M€</td>
<td>900 t</td>
</tr>
<tr>
<td>Other regions (3)</td>
<td>288 M€</td>
<td>94 900 t</td>
</tr>
</tbody>
</table>

⁽¹⁾ excluding seaweeds and freshwater fishing
⁽²⁾ equivalent live weight
⁽³⁾ including sales in overseas territories and foreign sales

Source: MEDDE / DPMA / BSPA
Sales of fishery products at auction in 2014

Number of auctions in 2014: 38

Sales by French vessels:
- Quantities sold: 200,900 tons
- Value of sales: 613 million euros

Sales by foreign-registered vessels:
- Quantities sold: 8,300 tons
- Value of sales: 23 million euros

Source: Ric / FranceAgriMer
Production / sales at auction

Quantities sold and value of sales by french vessels at the main auctions in 2014

Source: Ric / FranceAgriMer
Breakdown of quantities sold and value of sales at auction in 2013 by fleet segment

(1) Breakdown by fleet segment based on main gear used by vessels according to the 2012 IFREMER SIH survey - (2) excluding Mediterranean sea - (3) unspecified and inactives are not considered.

Sources: FranceAgriMer, Ifremer
Main species sold at auction by French vessels in 2014

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: Ric / FranceAgriMer
Sales of aquaculture products in metropolitan France

**Shellfish farming**

Quantities sold for consumption (tons) (1)

- **Oyster**
  - 80,000 tons
- **Mussel**
  - 77,000 tons
- **Other bivalves**
  - 2,100 tons

Total sales: 159,600 tons

Value of sales (million euros)

- **Oyster** (2)
  - 397 million euros
- **Mussel**
  - 139 million euros
- **Other bivalves**
  - 10 million euros

Total sales: 546 million euros

**Fish farming**

Quantities sold in 2012 (tons) (3)

- **Trout and salmon**
  - 32,200 tons
- **Carp and other freshwater fish**
  - 8,200 tons
- **Seabass, seabream and other marine fish**
  - 5,000 tons

Total sales: 45,400 tons

Value of sales in 2012 (million euros)

- **Trout and salmon**
  - 108 million euros
- **Carp and other freshwater fish**
  - 17 million euros
- **Seabass, seabream and other marine fish**
  - 37 million euros

Total sales: 162 million euros

(1) equivalent live weight - (2) excluding grant aids - (3) total sales (consumption, repopulation, recreational fishing, sales to another farmer) - (4) including farmed crustaceans

Source: MEDDE / DDIM / BSPA (aquaculture survey 2012)
Fishing fleet in 2014

Breakdown of total vessels by length (metropolitan France)

- less than 10 meters: 2,703 vessels
- from 10 to < 12 meters: 817 vessels
- from 12 to < 24 meters: 704 vessels
- from 24 to < 40 meters: 147 vessels
- more than 40 meters: 41 vessels

Breakdown of total vessels by fishery category (metropolitan France) (1)

- Small scale fisheries: 3,253 vessels
- Coastal fisheries: 457 vessels
- Offshore fisheries: 220 vessels
- High seas fisheries: 28 vessels
- Aquaculture and small scale fisheries: 17 vessels

Total France: 7,121 vessels

Source: MEDDE / DAM / SDFSIM (Fichier BARPOP)

Small scale fisheries: out of port ≤ 24 hours
Coastal fisheries: 24 hours < out of port ≤ 96 hours
Offshore fisheries: out of port > 96 hours
High seas fisheries: vessels over 1,000 GRT (gross register tonnage) or vessels over 150 GRT if out of port > 20 days
### Changes in the number of fishing vessels in metropolitan France

![Chart showing changes in the number of fishing vessels](chart.png)

Source: MEDDE / DAM / SIM (Fichier BARPOP)

<table>
<thead>
<tr>
<th>Year</th>
<th>&lt; 12 m</th>
<th>12 to less than 24 m</th>
<th>&gt; 24 m</th>
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<tbody>
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<td>1995</td>
<td>4,878</td>
<td>1,494</td>
<td>281</td>
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<td>1996</td>
<td>4,795</td>
<td>1,395</td>
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<td>1997</td>
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<td>1998</td>
<td>4,583</td>
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<tr>
<td>1999</td>
<td>4,461</td>
<td>1,239</td>
<td>271</td>
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<tr>
<td>2000</td>
<td>4,380</td>
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<td>275</td>
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<tr>
<td>2003</td>
<td>4,209</td>
<td>1,155</td>
<td>277</td>
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<tr>
<td>2004</td>
<td>4,069</td>
<td>1,068</td>
<td>274</td>
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<tr>
<td>2005</td>
<td>4,034</td>
<td>1,057</td>
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<td>2006</td>
<td>3,967</td>
<td>1,006</td>
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<td>2007</td>
<td>3,939</td>
<td>991</td>
<td>257</td>
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<td>2008</td>
<td>3,862</td>
<td>876</td>
<td>241</td>
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<tr>
<td>2009</td>
<td>3,815</td>
<td>817</td>
<td>225</td>
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<tr>
<td>2010</td>
<td>3,769</td>
<td>773</td>
<td>209</td>
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<td>3,747</td>
<td>721</td>
<td>207</td>
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<td>3,645</td>
<td>741</td>
<td>192</td>
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<td>2013</td>
<td>3,621</td>
<td>724</td>
<td>192</td>
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<tr>
<td>2014</td>
<td>3,580</td>
<td>704</td>
<td>188</td>
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</tbody>
</table>

### Aquaculture firms

- **Shellfish farming - including seaweed and shrimps**: 2,864
- **Marine fish farming and sturgeon**: 35
- **Continental salmonids farming**: 387

Source: MEDDE / DPMA / BSPA (aquaculture survey 2012)
Production

Jobs
Number of seamen employed on board French fishing vessels in 2012 (seamen of all nationalities)

13 309 metropolitan France

overseas territories 3 168

Total France 16 777

Regional sharing

Nord - Pas-de-Calais - Picardie 968
Haute-Normandie 616
Basse-Normandie 1 404
Bretagne 4 823
Pays de la Loire 1 172
Poitou-Charentes 783
Aquitaine 1 480
Languedoc-Roussillon 1 077
Provence-Alpes-Côte d'Azur 907
Corse 309

Source : MEDDE/DAM/SDSIM

Number of full time equivalent jobs in 2011 (1)

<table>
<thead>
<tr>
<th>Activity</th>
<th>Jobs</th>
<th>FTEJ</th>
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</thead>
<tbody>
<tr>
<td>shellfish farming</td>
<td>17 715</td>
<td>8 574</td>
</tr>
<tr>
<td>marine fish farming and sturgeon</td>
<td>648</td>
<td>602</td>
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<tr>
<td>continental salmonids farming</td>
<td>1 762</td>
<td>1 263</td>
</tr>
</tbody>
</table>

(1) including seasonal jobs
Source : MEDDE/DPMA/BSPA (aquaculture survey 2012)
Firms

fishmonger’s / trading / processing
by sales / by region
Fishmongers in 2014

Number of establishments: 2,926
Net sales: 1,135 million euros
Full time equivalent jobs: 7,475

Number of establishments per region:

- Île-de-France: 373
- Nord-Pas-de-Calais: 144
- Picardie: 56
- Haute-Normandie: 99
- Lorraine: 29
- Alsace: 12
- Bourgogne: 22
- Franche-Comté: 16
- Rhône-Alpes: 100
- Auvergne: 30
- Provence-Alpes-Côte d’Azur: 372
- Corse: 29
- Limousin: 21
- Poitou-Charentes: 213
- Pays de la Loire: 226
- Centre: 57
- Bretagne: 326
- Midi-Pyrénées: 131
- Languedoc-Roussillon: 292
- Midi-Pyrénées: 131
- Languedoc-Roussillon: 292
- Poitou-Charentes: 213
- Pays de la Loire: 226
- Centre: 57
- Bretagne: 326

Sources: Via.Aqua and Proteis for FranceAgriMer
## Trading firms in 2011

**Number of firms:**
- 306 trading firms
- 36 trading and processing firms

**Net sales:**
- 1,932 million euros
- 261 million euros for processing

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

<table>
<thead>
<tr>
<th>Region</th>
<th>% of total firms</th>
<th>% of total jobs</th>
<th>% of total net sales</th>
<th>Net Sales (M€)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nord - Pas-de-Calais</td>
<td>12% / 17% / 16%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Normandie</td>
<td>13% / 9% / 12%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bretagne</td>
<td>35% / 34% / 34%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Atlantique</td>
<td>22% / 21% / 20%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Méditerrannée</td>
<td>12% / 8% / 7%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Others regions</td>
<td>5% / 12% / 10%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: FranceAgriMer
Processing main activity firms in 2012

Number of firms: 295

Net sales: 4,862 million euros

Jobs: 16,184

Seafood processing net sales:
- Cooked meals: 14%
- Cooked shrimps: 3%
- First processing: 17%
- Canned seafood/soup: 18%
- Smoked salmon: 19%
- Fresh delicatessen (surimi, caviar, etc.): 23%
- Cured fish: 2%
- Others: 1%

Breakdown of firms by total net sales:
- Net sales < 1 M€: 30%
- Net sales between 1 M€ and 5 M€: 33%
- Net sales between 5 M€ and 15 M€: 21%
- Net sales > 15 M€: 17%

Breakdown of processing firms and sales by region:
- Nord - Pas-de-Calais: 14% / 10%
- Normandie: 6% / 7%
- Bretagne: 26% / 32%
- Atlantique: 13% / 27%
- Méditerranée: 10% / 3%
- Others regions: 31% / 21%

Note:
1. Filleting, cutting, peeling, packaging, surgelation
2. Seaweeds, in fish products, others

Source: FranceAgriMer
Trade

import / export by presentation / by species / by geographical origin / 
main species
Supply balance in 2013

Net weight (1,000 tons)

-1,090

Imports

Exports

Live weight (1,000 tons)

-2,070

Imports

Exports

Value (million euros)

-5,010

Imports

1,350

Exports

-3,660

Balance

Source: French customs
Imports - main species in 2014

Value (million euros)

- salmon: 1003 million euros
- shrimp: 769 million euros
- tuna: 587 million euros
- cod: 369 million euros
- scallop: 211 million euros
- saithe, pollack: 200 million euros
- lobster: 139 million euros
- crab: 87 million euros
- mussel: 78 million euros
- sardine: 77 million euros
- Norway lobster: 63 million euros
- mackerel: 59 million euros
- cephalopods: 58 million euros
- hake: 51 million euros
- seabream: 48 million euros

Exports - main species in 2014

Value (million euros)

- salmon: 176 million euros
- tuna: 152 million euros
- shrimp: 104 million euros
- oyster: 63 million euros
- cephalopods: 48 million euros
- lobster: 39 million euros
- scallop: 33 million euros
- hake: 29 million euros
- crab: 27 million euros
- sole: 27 million euros
- trout: 24 million euros
- monkfish: 20 million euros
- seabass: 20 million euros
- cod: 18 million euros
- anchovy: 17 million euros

Source: French customs
Imports by presentation in 2014

Imports by volume (1,000 tons)

Imports by value (million euros)

Imports by species group in 2014

Imports by volume (1,000 tons)

Imports by value (million euros)

(1) data collection methodology is detailed on inside back cover -
Source: French customs
Exports by presentation in 2014

Exports by volume (1,000 tons)

- **live, fresh, chilled**: 122
- **frozen**: 156
- **salted, dried, smoked**: 56
- **canned**: 12
- **non food use**: 91

Exports by value (million euros)

- **live, fresh, chilled**: 132
- **frozen**: 600
- **salted, dried, smoked**: 392
- **canned**: 176
- **non food use**: 132

Exports by species group in 2014

Exports by volume (1,000 tons)

- **marine fish**: 207
- **trout, salmon, eel and fresh water fish**: 50
- **crustaceans**: 64
- **bivalves and cephalopods**: 25
- **non food use**: 191

Exports by value (million euros)

- **marine fish**: 619
- **trout, salmon, eel and fresh water fish**: 201
- **crustaceans**: 75
- **bivalves and cephalopods**: 201
- **non food use**: 132

(1) data collection methodology is detailed on inside back cover.

Source: French customs
**Imports** of aquatic products by geographical origin in 2014

**Exports** of aquatic products by destination in 2014

Source: French Customs
Consumption

supply balance / purchases
households / catering / breakdown of purchases by distribution channel
Balance changes in production, imports and exports

(1) (2) (3)

Production, imports and exports in 2014

Balance changes in production, imports and exports

Supply balance in 2014

In volume (1,000 tons)

In value (million euros)

(1) data collection methodology is detailed on inside back cover - (2) live weight - (3) excluding non food use - (4) estimates for 2014 -
Source: FranceAgriMer
Supply balance

Changes in supply balance

Breakdown by products in 2013

Average annual consumption per capita

Source: FranceAgriMer

(1) data collection methodology is detailed on inside back cover - (2) live weight - (3) average 2011-2013 -
Households spending in 2014 (1)

- **Fresh products**: 32%
- **Chilled delicatessen**: 33%
- **Frozen products**: 20%
- **Canned products**: 15%

Total spending: 7,065 million euros

Percentage of purchasing households in 2014 (2)

- **Fresh products**: 79%
- **Chilled delicatessen**: 96%
- **Canned products**: 95%
- **Frozen products**: 87%

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

Source: FranceAgriMer following Kantar Worldpanel
Purchases of aquatic products by French households for home consumption in 2014

Fresh products
- 67% supermarkets
- 15% markets
- 9% fishmongers

Chilled delicatessen
- 78% supermarkets
- 9% hard discount
- 3% fishmongers and markets

Canned products
- 75% supermarkets
- 14% hard discount

Frozen products
- 50% supermarkets
- 31% freezer centers and home delivery
- 10% hard discount

(1) data collection methodology is detailed on inside back cover
Source: FranceAgriMer following Kantar Worldpanel
Breakdown of expenditures by presentation and species group in 2014 (1)

**Fresh products**
- 52% fish fillets
- 23% bivalves and cephalopods
- 16% whole fish
- 9% crustaceans

**Chilled delicatessen**
- 34% cured fish
- 13% surimi
- 35% others
- 18% cooked shrimp

**Frozen products**
- 13% bivalves and cephalopods
- 10% crustaceans
- 28% ready meals
- 49% fish

**Canned products**
- 50% tuna (excluding tuna salads)
- 15% sardine
- 15% mackerel
- 16% others

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

Source: FranceAgriMer following Kantar Worldpanel
Main species purchased fresh in 2014

(1) data collection methodology is detailed on inside back cover
(2) net weight

Source: FranceAgriMer following Kantar Worldpanel

(1) Les cahiers de FranceAgriMer 2015 / Key figures / FISHERIES AND AQUACULTURE
Spending in 2013

by presentation (million euros)

by catering outlet type (million euros)

Source: FranceAgriMer following Crédoc
Spending by catering outlet and by presentation in 2013

Self-managed institutional catering

Institutional catering firms

Independant restaurant outlets

Restaurant chains and groups

Source: FranceAgriMer following Crédoc
Breakdown of purchases by presentation for different outlets (value)

- **Supermarkets (1)**: 27% fresh products, 34% chilled delicatessen, 23% frozen products, 17% canned products.
- **Fishmongers and markets (2)**: 22% fresh products, 66% chilled delicatessen, 13% frozen products, 0% canned products.
- **Restaurants**: 27% fresh products, 6% chilled delicatessen, 25% frozen products, 2% canned products.
- **Institutional catering**: 22% fresh products, 3% chilled delicatessen, 68% frozen products, 8% canned products.

Breakdown of purchases by outlet for different presentations (quantities) (3)

- **Fresh products**: 60% supermarkets, 18% fishmongers and markets, 19% restaurants, 4% institutional catering.
- **Chilled delicatessen**: 95% supermarkets, 5% fishmongers and markets, 0% restaurants, 0% institutional catering.
- **Frozen products**: 71% supermarkets, 11% fishmongers and markets, 1% restaurants, 8% institutional catering.
- **Canned products**: 95% supermarkets, 5% fishmongers and markets, 0% restaurants, 3% institutional catering.

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

Source: Kantar Worldpanel and Crédoc for FranceAgriMer
Data collection methodology

**Data** Included data are the last available in 12 April 2015.

**Foreign Trade** Raw import/export data is 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 2013 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 following 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 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:

- Bilan annuel FranceAgriMer 2014 des ventes déclarées en halles à marée*
- Bilan annuel FranceAgriMer 2014 du commerce extérieur des produits de la pêche et de l’aquaculture*
- Bilan annuel FranceAgriMer 2014 de la consommation des produits de la pêche et de l’aquaculture*

* coming 2015