The fisheries and aquaculture sector in France

Production  Firms  Trade  Consumption
SUMMARY

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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
- Processing firms

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- Imports and exports by main species
- Imports and exports by presentation
- Imports and exports by species group
- Imports and exports by geographical area

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- 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
Production / landings and aquaculture

France in the EU-28 and in the world in 2014

Quantities sold in 2014 (1)
by method of production (tons) (2)

- Total: 691,000 tons
- Fish farming: 50,000
- Shellfish farming: 155,000
- Fresh and frozen landings: 489,000

Value of sales in 2014 (2)
by method of production (million euros)

- Total: 1,836 million euros
- Fish farming: 1,90,000
- Shellfish farming: 540
- Fresh and frozen landings: 1,106

(1) excluding seaweeds - (2) equivalent live weight - (3) sales to processing industry and export sales - (4) including farmed crustaceans
Source: MEEM / CGDD / SOeS

Source: FAO
Changes in quantities sold in metropolitan France

Main species sold in 2015

<table>
<thead>
<tr>
<th>Species</th>
<th>1997</th>
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<table>
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<tr>
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</table>

<table>
<thead>
<tr>
<th>Million euros</th>
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</thead>
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<td>trout (5)</td>
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<td>mussel (5)</td>
</tr>
<tr>
<td>sole</td>
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<td>scallop</td>
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<tr>
<td>seabass</td>
</tr>
<tr>
<td>norway lobster</td>
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<td>mackerel</td>
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<td>squid</td>
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<tr>
<td>cuttlefish</td>
</tr>
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<td>sardine</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: MEEM/CGDD/SOeS
Fresh and frozen landings in 2015\(^{(1)}\)

**Sales**

value (million euros) / quantity (tons)\(^{(2)}\)

<table>
<thead>
<tr>
<th>Region</th>
<th>Value (M€)</th>
<th>Quantity (t)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nord - Pas-de-Calais</td>
<td>54 M€</td>
<td>26 600 t</td>
</tr>
<tr>
<td>Haute-Normandie</td>
<td>37 M€</td>
<td>15 200 t</td>
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<tr>
<td>Basse-Normandie</td>
<td>93 M€</td>
<td>39 500 t</td>
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<td>Bretagne</td>
<td>351 M€</td>
<td>141 100 t</td>
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<td>Pays de la Loire</td>
<td>111 M€</td>
<td>29 500 t</td>
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<tr>
<td>Poitou-Charentes</td>
<td>53 M€</td>
<td>10 000 t</td>
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<tr>
<td>Aquitaine</td>
<td>30 M€</td>
<td>6 700 t</td>
</tr>
<tr>
<td>Provence-Alpes-Côte d’Azur</td>
<td>5 M€</td>
<td>1 100 t</td>
</tr>
<tr>
<td>Languedoc-Roussillon</td>
<td>33 M€</td>
<td>7 600 t</td>
</tr>
<tr>
<td>Corse</td>
<td>8 M€</td>
<td>2 900 t</td>
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<tr>
<td>Other regions (^{(3)})</td>
<td>330 M€</td>
<td>163 700 t</td>
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</tbody>
</table>

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

Source: MEEM / CGDD / SOeS
Sales of fishery products at auction in 2016

Number of auctions: 37

Sales by French vessels
- quantities sold: 188,958 tons
- value of sales: 644 million euros

Sales by foreign-registered vessels
- quantities sold: 7,575 tons
- value of sales: 26 million euros

Source: Visiomer / FranceAgriMer
### Quantities sold and value of sales by French vessels at the main auctions in 2016

<table>
<thead>
<tr>
<th>Location</th>
<th>Quantities sold (tons)</th>
<th>Value of sales (1,000 euros)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dunkerque</td>
<td>29,930</td>
<td>412,770</td>
</tr>
<tr>
<td>Boulogne/Mer</td>
<td>14,254</td>
<td>134,790</td>
</tr>
<tr>
<td>Dieppe</td>
<td>214,72</td>
<td>134,790</td>
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<tr>
<td>Saint Malo</td>
<td>17,008</td>
<td>134,790</td>
</tr>
<tr>
<td>Concarneau</td>
<td>214,05</td>
<td>134,790</td>
</tr>
<tr>
<td>Lorient</td>
<td>23,719</td>
<td>134,790</td>
</tr>
<tr>
<td>Cherbourg</td>
<td>17,146</td>
<td>134,790</td>
</tr>
<tr>
<td>Saint Quay Portrieux</td>
<td>20,878</td>
<td>134,790</td>
</tr>
<tr>
<td>Ile d’Yeu</td>
<td>15,769</td>
<td>134,790</td>
</tr>
<tr>
<td>St. Guénole</td>
<td>17,146</td>
<td>134,790</td>
</tr>
<tr>
<td>Arzon</td>
<td>10,511</td>
<td>134,790</td>
</tr>
<tr>
<td>Guingamp</td>
<td>5,977</td>
<td>134,790</td>
</tr>
<tr>
<td>Audierne</td>
<td>6,581</td>
<td>134,790</td>
</tr>
<tr>
<td>Douarnenez</td>
<td>5,977</td>
<td>134,790</td>
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<tr>
<td>Brest</td>
<td>5,229</td>
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<td>Roscoff</td>
<td>20,878</td>
<td>134,790</td>
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<tr>
<td>Saint Quay Portrieux</td>
<td>20,878</td>
<td>134,790</td>
</tr>
<tr>
<td>Erquy</td>
<td>214,05</td>
<td>134,790</td>
</tr>
<tr>
<td>Cancale</td>
<td>2,441</td>
<td>134,790</td>
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<tr>
<td>Saint Maol</td>
<td>17,146</td>
<td>134,790</td>
</tr>
<tr>
<td>Granville</td>
<td>10,511</td>
<td>134,790</td>
</tr>
<tr>
<td>Cherbourg</td>
<td>5,769</td>
<td>134,790</td>
</tr>
<tr>
<td>Grandcamp</td>
<td>2,854</td>
<td>134,790</td>
</tr>
<tr>
<td>Port en Bessin</td>
<td>2,854</td>
<td>134,790</td>
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<td>Fecamp</td>
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<td>134,790</td>
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<tr>
<td>Dieppe</td>
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<td>134,790</td>
</tr>
<tr>
<td>Boulogne/Mer</td>
<td>134,790</td>
<td>134,790</td>
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</tbody>
</table>

**Source:** Visiomer / FranceAgriMer
Breakdown of quantities sold and value of sales at auction in 2016 by fleet segment

<table>
<thead>
<tr>
<th>Fleet Segment</th>
<th>Quantities Sold (tons)</th>
<th>Value of Sales (1000 euros)</th>
</tr>
</thead>
<tbody>
<tr>
<td>trawl exclusively</td>
<td>398</td>
<td>53</td>
</tr>
<tr>
<td>net exclusively</td>
<td>310</td>
<td>35</td>
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<tr>
<td>seine net</td>
<td>394</td>
<td>12</td>
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<tr>
<td>trawl and other gear</td>
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<td>24</td>
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<tr>
<td>dredge</td>
<td>53</td>
<td>31</td>
</tr>
<tr>
<td>net, pot and trap</td>
<td>202</td>
<td>16</td>
</tr>
<tr>
<td>pot and trap exclusively</td>
<td>157</td>
<td>16</td>
</tr>
<tr>
<td>hook exclusively</td>
<td>114</td>
<td>12</td>
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<tr>
<td>net and hook</td>
<td>114</td>
<td>7</td>
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<td>pot and trap, hook</td>
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<td>glass eel gear</td>
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<td>11</td>
</tr>
<tr>
<td>miscellaneous coastal gear</td>
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<td>5</td>
</tr>
<tr>
<td>total</td>
<td>2,209</td>
<td>35</td>
</tr>
</tbody>
</table>

Sources: FranceAgriMer, Ifremer

(1) Breakdown by fleet segment based on main gear used by vessels according to the 2014 Ifremer SIH survey  -  (2) excluding Mediterranean sea  -  (3) unspecified and inactives are not considered
Production / Sales of fishery products

Main species sold at auction by French vessels in 2016

Quantities sold (tons)

- Cephalopods: 20,000 tons
- Bivalves: 15,000 tons
- Crustaceans: 10,000 tons
- Tuna and small pelagics: 5,000 tons
- Other fish: 5,000 tons

Value of sales (1,000 euros)

- Cephalopods: 9,000 million euros
- Bivalves: 7,000 million euros
- Crustaceans: 5,000 million euros
- Tuna and small pelagics: 3,000 million euros
- Other fish: 2,000 million euros

Changes in quantities sold by the French vessels by species group

(1,000 tons)

- Cephalopods: +10%
- Bivalves: -5%
- Crustaceans: +15%
- Tuna and small pelagics: +20%
- Other fish: -10%

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

(Million euros)

- Cephalopods: +15%
- Bivalves: -10%
- Crustaceans: +20%
- Tuna and small pelagics: +10%
- Other fish: -5%

Source: Visiomer / FranceAgriMer
Sales of aquaculture products in metropolitan France

Shellfish farming 2014

Quantities sold for consumption (tons)(1)
- oyster: 76,600 tons
- mussel: 75,100 tons
- other bivalves: 2,760 tons
Total sales: 154,460 tons

Value of sales (million euros)
- oyster: 388 million euros
- mussel: 139 million euros
- other bivalves: 14 million euros
Total sales: 541 million euros

Fish farming 2014

Quantities sold (tons)(2)
- trout and salmon: 35,650 tons
- carp and other freshwater fish: 8,150 tons
- seabass, seabream and other marine fish: 5,150 tons
Total sales: 48,950 tons

Value of sales (million euros)
- trout and salmon: 120 million euros
- carp and other freshwater fish: 29 million euros
- seabass, seabream and other marine fish: 35 million euros
Total sales: 184 million euros

(1) equivalent live weight - (2) total sales (consumption, repopulation, recreational fishing, sales to another farmer) - (3) including farmed crustaceans
Source: MEEM / DPMA / (aquaculture survey 2014)
Production

Fishing fleet

Breakdown of total vessels by length in 2016 (metropolitan France)

<table>
<thead>
<tr>
<th>Length</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than 10 meters</td>
<td>2,788</td>
</tr>
<tr>
<td>From 10 to &lt; 12 meters</td>
<td>815</td>
</tr>
<tr>
<td>From 12 to &lt; 24 meters</td>
<td>697</td>
</tr>
<tr>
<td>From 24 to &lt; 40 meters</td>
<td>149</td>
</tr>
<tr>
<td>More than 40 meters</td>
<td>37</td>
</tr>
</tbody>
</table>

Breakdown of total vessels by fishery category in 2014 (metropolitan France) (1)

<table>
<thead>
<tr>
<th>Fishery Category</th>
<th>Number</th>
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</thead>
<tbody>
<tr>
<td>Small scale fisheries</td>
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<tr>
<td>Coastal fisheries</td>
<td>457</td>
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<td>Offshore fisheries</td>
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<td>High seas fisheries</td>
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<tr>
<td>Both aquaculture and small scale fisheries</td>
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</tbody>
</table>

Total France: 7,373 vessels

Small scale fisheries: out of port 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

Source: MEEM / DAM / SDSIM
Fishing fleet / Aquaculture firms

Changes in the number of fishing vessels in metropolitan France

Source: MEEM / DAM / SIDSIM (Fichier BARPOP)

Fishing fleet / Aquaculture firms

Aquaculture firms

- Shellfish farming - including seaweed and shrimps: 2818
- Marine fish farming and sturgeon: 36
- Continental salmonids farming: 374

Source: MEEM / DPMA / (aquaculture survey 2013)
Production

Jobs
Number of seamen employed on board French fishing vessels in 2015 (seamen of all nationalities)

- Total France: 16,236
- Metropolitan France: 13,454
- Overseas territories: 2,782

Regional sharing

Number of full time equivalent jobs in 2013 (1)

<table>
<thead>
<tr>
<th>Region</th>
<th>Jobs</th>
<th>FTEJ</th>
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<tbody>
<tr>
<td>Shellfish farming</td>
<td>16,277</td>
<td>8,763</td>
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<tr>
<td>Marine fish farming and sturgeon</td>
<td>674</td>
<td>617</td>
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<tr>
<td>Continental salmonids farming</td>
<td>1,667</td>
<td>1,295</td>
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</table>

(1) including seasonal jobs
Source: MEEM/DPMA (aquaculture survey 2013)
FIRMS
fishmongers / trading / processing
by sales / region

/15
Fishmongers in 2010

Number of establishments per region

<table>
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<th>Region</th>
<th>Number</th>
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<tbody>
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<td>Île-de-France</td>
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</tr>
<tr>
<td>Nord-Pas-de-Calais</td>
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<tr>
<td>Haute-Normandie</td>
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<tr>
<td>Basse-Normandie</td>
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<tr>
<td>Picardie</td>
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<tr>
<td>Champagne-Ardenne</td>
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<tr>
<td>Lorraine</td>
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<tr>
<td>Alsace</td>
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<td>Franche-Comté</td>
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<tr>
<td>Aquitaine</td>
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<tr>
<td>Midi-Pyrénées</td>
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</tr>
<tr>
<td>Languedoc-Roussillon</td>
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<tr>
<td>Provence-Alpes-Côte d'Azur</td>
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<tr>
<td>Corsica</td>
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<tr>
<td>Pays de la Loire</td>
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<tr>
<td>Centre</td>
<td>57</td>
</tr>
<tr>
<td>Bretagne</td>
<td>326</td>
</tr>
</tbody>
</table>

Sources: Via.Aqua and Proteis for FranceAgriMer
Trading firms in 2015

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

Breakdown of firms and total net sales by region:

- Nord - Pas-de-Calais: 12% / 14% / 18%
- Normandie: 17% / 11% / 7%
- Bretagne: 34% / 34% / 28%
- Atlantique: 19% / 21% / 20%
- Méditerranée: 12% / 7% / 8%

Others regions including overseas territories: 6% / 13% / 20%

Source: FranceAgriMer

(1) data 2014 or 2015
Processing main activity firms in 2015

- **Number of firms**: 499
- **Net sales per firm**: 31 million euros, including seafood and fish farming processing
- **Jobs**: 112
- **Seafood processing net sales**:
  - Cooked shrimps: 37%
  - Cooked meals: 15%
  - First processing: 27%
  - Canned seafood/soup: 5%
  - Fresh delicatessen (surimi, caviar, etc.): 5%
  - Cured fish included: 10%
  - Others: 1%

**Breakdown of firms by total net sales**:
- Net sales < 1 M€: 22%
- Net sales between 1 M€ and 5 M€: 31%
- Net sales between 5 M€ and 15 M€: 23%
- Net sales > 15 M€: 24%

**Breakdown of processing firms and sales by region**:
- **Hauts-de-France**: 12% / 5%
- **Normandie**: 7% / 10%
- **Bretagne**: 23% / 18%
- **Nouvelle-Aquitaine**: 15% / 12%
- **Méditerranée**: 9% / 4%
- **Others regions** (including overseas territories): 34% / 51%

Source: FranceAgriMer / processing firms survey

(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 origin

main species
Supply balance in 2016

**Net weight (1,000 tons)**
- Exportations: 348
- Importations: -1,134

**Live weight (1,000 tons)**
- Exportations: 560
- Importations: -1,902

**Value (million euros)**
- Exportations: 1,568
- Importations: -5,265
- Balance: -3,697

Source: French customs
Imports - main species in 2016

Imports and exports / metropolitan France and overseas territories

Exports - main species in 2016

Source: French customs
Imports by presentation in 2016

Imports by volume (1,000 tons)

- Frozen: 923
- Live, fresh, chilled: 424
- Canned: 310
- Salted, dried, smoked: 127
- Non food use: 70

Imports by value (million euros)

- Frozen: 2,215
- Live, fresh, chilled: 1,634
- Canned: 563
- Salted, dried, smoked: 207
- Non food use: 150

Imports by species group in 2016

Imports by volume (1,000 tons)

- Marine fish: 999
- Crustaceans: 488
- Trout, salmon, eel and fresh water fish: 342
- Bivalves and cephalopods: 247
- Non food use: 152

Imports by value (million euros)

- Marine fish: 2,054
- Crustaceans: 1,179
- Trout, salmon, eel and fresh water fish: 1,381
- Bivalves and cephalopods: 551
- Non food use: 150

(1) Data collection methodology is detailed on inside back cover.
Source: French customs
Exports by presentation in 2016

Exports by volume (1,000 tons)

Exports by value (million euros)

Exports by species group in 2016

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 2016

Value (million euros)

Exports of aquatic products by destination in 2016

Value (million euros)
CONSUMPTION

supply balance / purchases

households / catering / breakdown of purchases by distribution channel
Balance changes in production, imports and exports \(^{(1)(2)(3)}\)

(1 000 tons)

Supply balance in 2015 \(^{(1)(2)(3)}\)

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 and 2015

Source: FranceAgriMer
Breakdown by products in 2015

- 19% farmed shellfish
- 9% shellfish from captures
- 13% farmed finfish
- 59% finfish from captures

Average annual consumption per capita: 34 kg

Changes in supply balance

Average growth rate over the last ten years: -1%

Source: FranceAgriMer
Households spending in 2016

- Fresh products: 34%
- Chilled delicatessen: 34%
- Frozen products: 18%
- Canned products: 14%

Total household spending: 7,262 million euros

Percentage of purchasing households in 2016

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

Notes:
(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 following Kantar Worldpanel
Purchases of aquatic products by French households for home consumption in 2016(1)

Fresh products
- 67% supermarkets
- 13% markets
- 9% fishmongers

Chilled delicatessen
- 77% supermarkets
- 9% hard discount
- 2% fishmongers and markets

Canned products
- 75% supermarkets
- 12% hard discount

Frozen products
- 50% supermarkets
- 17% freezer centers and home delivery
- 11% 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 2016 (1)

**Fresh products**
- 14% whole fish
- 55% fish fillets
- 8% crustaceans
- 23% bivalves and cephalopods

**Chilled delicatessen**
- 32% cured fish
- 37% others
- 12% surimi
- 19% cooked shrimp

**Frozen products**
- 13% bivalves and cephalopods
- 13% crustaceans
- 18% ready meals
- 56% fish

**Canned products**
- 16% sardine
- 14% mackerel
- 5% tuna salads
- 18% others
- 47% tuna (excluding tuna salads)

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(1) Data collection methodology is detailed on inside back cover
Source: FranceAgriMer following Kantar Worldpanel
Purchases by French households for home consumption

Main species purchased fresh in 2016 (1)

- **Tons** (2)
  - Mussel: 25,673
  - Oyster: 22,258
  - Cod: 21,280
  - Salmon: 7,448
  - Saithe: 6,449
  - Scallop: 6,054
  - Whelk: 5,454
  - Whiting: 5,278
  - Monkfish: 4,937
  - Hake: 4,817
  - Common Dab: 4,780
  - Mackerel: 4,456
  - Brown Crab: 3,956
  - Sardine: 3,840

- **Million Euros**
  - Salmon: 374
  - Cod: 189
  - Oyster: 160
  - Mussel: 82
  - Monkfish: 78
  - Saithe: 75
  - Whiting: 66
  - Norway Lobster: 61
  - Seabream: 52
  - Seabass: 52
  - Sole: 51
  - Hake: 51
  - Brown Crab: 40
  - Scallop: 32

- **Percentage of purchasing households (%)**
  - Salmon: 43
  - Cod: 19
  - Mussel: 20
  - Saithe: 19
  - Trout: 16
  - Oyster: 19
  - Whiting: 14
  - Common Dab: 13
  - Whelk: 11
  - Ling: 11
  - Scallop: 11
  - Hake: 11
  - Mackerel: 11
  - Sardine: 10
  - Seabass: 10

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

Source: FranceAgriMer following Kantar Worldpanel
Spending in 2014

by presentation (million euros)

- Fresh products: 559 million euros
- Chilled delicatessen: 54 million euros
- Frozen products: 399 million euros
- Canned products: 48 million euros

by catering outlet type (million euros)

- Self-managed institutional catering: 215 million euros
- Institutional catering firms: 111 million euros
- Independent restaurant outlets: 611 million euros
- Restaurant chains and groups: 132 million euros

Total: 1,069 million euros

Source: FranceAgriMer following Cedoc
Spending by catering outlet and by presentation in 2014

Source: FranceAgriMer following Crédoc
Consumption

Breakdown of purchases by presentation for different outlets in 2014 (value)

Breakdown of purchases by outlet for different presentations in 2014 (quantities)\(^{(3)}\)

(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 on April the 12th 2017.

**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 2015 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, 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:
• Bilan annuel FranceAgriMer 2016 des ventes déclarées en halles à marée
• Bilan annuel FranceAgriMer 2016 du commerce extérieur des produits de la pêche et de l’aquaculture
• Bilan annuel FranceAgriMer 2016 de la consommation des produits de la pêche et de l’aquaculture

* coming 2017

**VISIOMer** données des notes de vente du réseau inter-cités et hors créées
**MEEM** Ministère de l’Environnement, de l’Énergie et de la Mer
**DPMA** Direction des Pêches Maritimes et de l’Aquaculture
**SoES** Service d’Observation et des Statistiques
**DAM** Direction des Affaires Maritimes
**SDSIM** Sous Direction des Systèmes d’information maritimes
**Ifremer** Institut français de recherche pour l’exploitation de la mer