Key figures FranceAgriMer

The fisheries and aquaculture sector in France

Production
Firms
Trade
Consumption

April 2019
SUMMARY

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France in the EU-28 & in the world in 2016
Total sales of fisheries and aquaculture products
Sales of fisheries products at auction
Sales of aquaculture products
Fishing fleet
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Supply balance
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Imports and exports by presentation
Imports and exports by species group
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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
France in the EU-28 and in the world in 2016

Catches EU: 4.9%
Aquaculture EU: 1.2%

in 1000 tons and % of total

Spain 1,146
18%

United Kingdom 894
14%

France 698
11%

Denmark 705
11%

Others 1,692
26%

UE 6,451
44%

non member countries: 1,709,000 / 96%

Source: FAO

Quantities sold in 2016(1)
by method of production (million tons)(2)

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

Spain 1,146
18%

United Kingdom 894
14%

France 698
11%

Denmark 705
11%

Others 1,692
26%

UE 6,451
44%

non member countries: 1,709,000 / 96%

Source: Eumofa

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

Source: MAA/DPMA/Eumofa

4/ The fisheries and aquaculture sector in France > 2019 Edition © FranceAgriMer 2018 /
Changes in quantities sold in metropolitan France\(^{(1)}\)

(1 000 tons) (3)

<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>700</td>
<td>600</td>
<td>500</td>
</tr>
<tr>
<td>1998</td>
<td>600</td>
<td>500</td>
<td>400</td>
</tr>
<tr>
<td>1999</td>
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<td>2003</td>
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<tr>
<td>2004</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

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

- Oyster: 118,900
- Tuna: 102,300
- Mussel: 75,000
- Hake: 55,000
- Trout: 45,000
- Sardine: 28,000
- Scallop: 25,700
- Monkfish: 24,600
- Mackerel: 24,000
- Saithe: 23,800
- Whiting: 23,000
- Cod: 20,600
- Blue whiting: 14,000

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

Source: MEEM / CGDD / SOeS
Production / landings

Fresh and frozen landings in 2018

Sales

value (million euros) / quantity (tons)

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**

<table>
<thead>
<tr>
<th>Gear Type</th>
<th>Quantities Sold (tons)</th>
<th>Value of Sales (1,000 euros)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trawl exclusively</td>
<td>82,046</td>
<td>273,972</td>
</tr>
<tr>
<td>Net exclusively</td>
<td>78,366</td>
<td>231,804</td>
</tr>
<tr>
<td>Trawl and other gear</td>
<td>75,844</td>
<td>262,076</td>
</tr>
<tr>
<td>Dredge</td>
<td>25,141</td>
<td>82,076</td>
</tr>
<tr>
<td>Seiners</td>
<td>25,339</td>
<td>75,844</td>
</tr>
<tr>
<td>Net, pot and trap</td>
<td>25,141</td>
<td>82,076</td>
</tr>
<tr>
<td>Hook exclusively</td>
<td>25,141</td>
<td>82,076</td>
</tr>
<tr>
<td>Net and hook</td>
<td>25,141</td>
<td>82,076</td>
</tr>
<tr>
<td>Pot and trap, exclusively</td>
<td>25,141</td>
<td>82,076</td>
</tr>
<tr>
<td>Pot and trap, hook</td>
<td>25,141</td>
<td>82,076</td>
</tr>
<tr>
<td>Glass eel gear</td>
<td>25,141</td>
<td>82,076</td>
</tr>
<tr>
<td>Miscellaneous coastal gear</td>
<td>25,141</td>
<td>82,076</td>
</tr>
<tr>
<td>Seiners</td>
<td>25,141</td>
<td>82,076</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>2,549</strong></td>
<td><strong>928,272</strong></td>
</tr>
</tbody>
</table>

**Number of vessels (sales at auction in 2018)**

<table>
<thead>
<tr>
<th>Gear Type</th>
<th>Number of Vessels</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trawl and other gear</td>
<td>437</td>
</tr>
<tr>
<td>Trawl exclusively</td>
<td>403</td>
</tr>
<tr>
<td>Net exclusively</td>
<td>320</td>
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<tr>
<td>Dredge</td>
<td>259</td>
</tr>
<tr>
<td>Net, pot and trap</td>
<td>253</td>
</tr>
<tr>
<td>Pot and trap, exclusively</td>
<td>220</td>
</tr>
<tr>
<td>Hook exclusively</td>
<td>178</td>
</tr>
<tr>
<td>Glass eel gear</td>
<td>130</td>
</tr>
<tr>
<td>Pot and trap, hook</td>
<td>108</td>
</tr>
<tr>
<td>Net and hook</td>
<td>98</td>
</tr>
<tr>
<td>Miscellaneous coastal gear</td>
<td>80</td>
</tr>
<tr>
<td>Seiners</td>
<td>63</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>2,549</strong></td>
</tr>
</tbody>
</table>

(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
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)

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

Value of sales (million euros)

- Other bivalves: 22 million euros
- Oyster: 486 million euros
- Mussel: 149 million euros
- Total sales: 657 million euros

Fish farming 2016

Quantities sold (tons) (2)

- Seabass, seabream and other marine fish: 4,830 tons
- Trout and salmon: 27,900 tons
- Carp and other freshwater fish: 8,000 tons
- Total sales: 40,730 tons

Value of sales (million euros)

- Seabass, seabream and other marine fish: 41 million euros
- Trout and salmon: 113 million euros
- Carp and other freshwater fish: 14 million euros
- Total sales: 168 million euros

(1) equivalent live weight - (2) including farmed crustaceans

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

Fishing fleet

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

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

Small scale fisheries  out of port for less than 24 hours
Coastal fisheries  between 24 hours and 96 hours out of port
Offshore fisheries  more than 96 hours out of port
High seas fisheries  vessels over 1 000 GRT (gross register tonnage) or vessels over 150 GRT if out of port more than 20 days

(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: IFREMER 2017 + study on overseas territories
Changes in the number of fishing vessels in metropolitan France

<table>
<thead>
<tr>
<th>Year</th>
<th>&lt; 12 m</th>
<th>12 to less than 24 m</th>
<th>&gt; 24 m</th>
</tr>
</thead>
<tbody>
<tr>
<td>1995</td>
<td>4 878</td>
<td>1 434</td>
<td>281</td>
</tr>
<tr>
<td>1996</td>
<td>4 795</td>
<td>1 395</td>
<td>285</td>
</tr>
<tr>
<td>1997</td>
<td>4 656</td>
<td>1 318</td>
<td>279</td>
</tr>
<tr>
<td>1998</td>
<td>4 583</td>
<td>1 258</td>
<td>277</td>
</tr>
<tr>
<td>1999</td>
<td>4 461</td>
<td>1 239</td>
<td>271</td>
</tr>
<tr>
<td>2000</td>
<td>4 380</td>
<td>1 233</td>
<td>270</td>
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<td>2001</td>
<td>4 271</td>
<td>1 201</td>
<td>272</td>
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<tr>
<td>2002</td>
<td>4 256</td>
<td>1 179</td>
<td>275</td>
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<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>
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<tr>
<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>
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<td>2008</td>
<td>3 862</td>
<td>876</td>
<td>241</td>
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<td>2009</td>
<td>3 815</td>
<td>817</td>
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<tr>
<td>2010</td>
<td>3 769</td>
<td>773</td>
<td>209</td>
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<td>2011</td>
<td>3 747</td>
<td>721</td>
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<tr>
<td>2012</td>
<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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<td>2014</td>
<td>3 580</td>
<td>704</td>
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<td>2015</td>
<td>3 665</td>
<td>683</td>
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<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
Production

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

Regional sharing

Number of full time equivalent jobs in 2016\(^{(1)}\)

<table>
<thead>
<tr>
<th>Sector</th>
<th>Jobs</th>
<th>FTEJ</th>
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</thead>
<tbody>
<tr>
<td>shellfish farming</td>
<td>13 841</td>
<td>7 892</td>
</tr>
<tr>
<td>marine fish farming and sturgeon(^{(2)})</td>
<td>521</td>
<td>468</td>
</tr>
<tr>
<td>continental salmonids farming</td>
<td>1 223</td>
<td>945</td>
</tr>
</tbody>
</table>

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

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

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% / 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 2017

- **Number of firms:** 199
- **Net sales per firm:** 4,782 million euros
- **Jobs:** 13,996

### Seafood processing net sales

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

### Breakdown of processing firms and sales by region

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

### Note

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

---

Source: FranceAgriMer / processing firms survey
Supply balance in 2018

Net weight (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 2018
Value (million euros)

Exports - main species in 2018
Value (million euros)

Source: French customs
Imports by presentation in 2018

Imports by volume (1,000 tons)

Imports by value (million euros)

Imports by species group in 2018

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 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)

- Norway: 2,513 million euros
- United Kingdom: 2,492 million euros
- Spain: 1,962 million euros
- Ecuador: 1,265 million euros
- Netherlands: 792 million euros
- United States: 792 million euros
- Iceland: 792 million euros
- Denmark: 609 million euros
- China: 388 million euros
- Poland: 176 million euros

Source: French Customs

Exports of aquatic products by destination in 2018

Value (million euros)

- Spain: 2,513 million euros
- Italy: 2,492 million euros
- Belgium: 1,763 million euros
- Germany: 1,573 million euros
- United Kingdom: 1,113 million euros
- Switzerland: 395 million euros
- Netherlands: 60 million euros
- Portugal: 30 million euros
- Denmark: 26 million euros
- Austria: 25 million euros
- China: 23 million euros
- Luxembourg: 23 million euros
- Ivory Coast: 22 million euros
- Ireland: 21 million euros
- United States: 20 million euros

Source: French Customs
CONSUMPTION
supply balance / purchases
households / catering / breakdown of purchases by distribution channel
Balance changes in production, imports and exports

Supply balance in 2016

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

```
Changes in supply balance

<table>
<thead>
<tr>
<th>Year</th>
<th>Supply Balance (kg)</th>
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</thead>
<tbody>
<tr>
<td>1999</td>
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</tr>
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<td>2000</td>
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<td>2001</td>
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<td>25,000</td>
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<td>2003</td>
<td>20,000</td>
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<td>2004</td>
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<td>35,000</td>
</tr>
<tr>
<td>2015</td>
<td>40,000</td>
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</tbody>
</table>
```

Average growth rate over the last ten years: -0.61%

**Breakdown by products in 2015**

```
Breakdown by products in 2015

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

**Average annual consumption per capita**

```
Average annual consumption per capita (kg)

<table>
<thead>
<tr>
<th>Product</th>
<th>Consumption (kg)</th>
</tr>
</thead>
<tbody>
<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>1.29</td>
</tr>
<tr>
<td>Sardine</td>
<td>1</td>
</tr>
<tr>
<td>Hake</td>
<td>1</td>
</tr>
<tr>
<td>Herring</td>
<td>0.75</td>
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<tr>
<td>Mackerel</td>
<td>0.74</td>
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<td>Saithe</td>
<td>0.67</td>
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<tr>
<td>Monkfish</td>
<td>0.40</td>
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</tbody>
</table>
```

**Key figures**

FranceAgriMer 2019 / The fisheries and aquaculture
Households spending in 2018 (1)

- Fresh products: 32%
- Frozen products: 17%
- Canned products: 15%
- Chilled delicatessen: 36%

Total spending: 7,429 million euros

Percentage of purchasing households in 2018 (2)

- Fresh products: 81%
- Chilled delicatessen (3): 95%
- Canned products: 94%
- Frozen products: 83%

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</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 household buys the product at least once a year. (3) With bar code.
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

- Crustaceans: 6%
- Whole fish: 14%
- Bivalves and cephalopods: 22%

Chilled delicatessen

- Cooked shrimp: 54%
- Cured fish: 33%
- Surimi: 10%
- Others: 39%

Frozen products

- Fish: 50%
- Bivalves and cephalopods: 15%
- Crustaceans: 11%

Canned products

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

Source: FranceAgriMer from Kantar Worldpanel

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

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Main species purchased fresh in 2018 (1)

tons (2)

- Mussel: 38,921
- Oyster: 24,144
- Salmon: 22,556
- Cod: 22,797
- Saithe: 15,370
- Scallop: 7,267
- Seabream: 5,328
- Trout: 4,465
- Monkfish: 4,223
- Whelk: 4,098
- Whiting: 3,728
- Sardine: 3,682
- Hake: 3,653
- Seabass: 1,624

million euros

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

percentage of purchasing households (%)

- Salmon: 43
- Cod: 40
- Mussel: 32
- Saithe: 23
- Oyster: 18
- Monkfish: 18
- Trout: 16
- Whiting: 16
- Seabream: 14
- Ling: 14
- Whelk: 13
- Seabass: 11
- Mackerel: 10
- Sardine: 10
- Haddock: 9
- Monkfish: 9

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

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

- **Tons**
  - Pollock: 23,472 tons
  - Ready meals: 20,580 tons
  - Cod: 18,420 tons
  - Crustace, biv, cephalo-seafood ready meals: 16,986 tons
  - Salmon: 15,384 tons
  - Shrimp/king prawns: 15,246 tons
  - Squid: 12,700 tons
  - Scallop: 7,466 tons
  - Frozen seafood: 6,821 tons
  - Hake: 5,977 tons
  - Scallop without shell: 3,877 tons
  - Mussels: 2,805 tons
  - Seafood ready meals-mussels: 940 tons

- **Million euros**
  - Pollock: 189 million euros
  - Ready meals: 156 million euros
  - Cod: 133 million euros
  - Crustace, biv, cephalo-seafood ready meals: 93 million euros
  - Salmon: 71 million euros
  - Shrimp/king prawns: 38 million euros
  - Squid: 29 million euros
  - Scallop: 25 million euros
  - Frozen seafood: 19 million euros
  - Hake: 10 million euros
  - Scallop without shell: 5 million euros
  - Mussels: 5 million euros
  - Seafood ready meals-mussels: 2 million euros

- **Percentage of purchasing households (in %)**
  - Frozen fish-pollock: 46%
  - Ready meals: 38%
  - Cod: 29%
  - Crustace, biv, cephalo-frozen biv: 28%
  - Shrimp/king prawns: 25%
  - Salmon: 22%
  - Scallop: 22%
  - Scallop without shell: 19%
  - Squid: 13%
  - Frozen seafood: 13%
  - Hake: 10%
  - Mussels: 9%
  - Seafood ready meals-mussels: 4%

Source: FranceAgriMer from Kantar Worldpanel
Main species purchased frozen in 2018\(^{(1)}\)

**Tons**

- Tuna: 8 837
- Mackerel: 20 267
- Sardine: 13 374
- Fish soup-crustaceans: 6 586
- Fish spread-tuna: 1 835
- Canned crustaceans except spread: 1 806
- Canned cephalopods except spread: 1 631
- Anchovy: 6 694
- Fish spread-mackerel: 680
- Salmon: 6 777
- Canned bivalves except spread: 372
- Fish spread-sardine: 139
- Fish spread-mackerel: 57

**Million euros**

- Tuna: 49 211
- Sardine: 17 044
- Mackerel: 16 654
- Canned crustaceans except spread: 3 352
- Fish soup-crustaceans: 2 292
- Fish spread-tuna: 2 251
- Anchovy: 1 162
- Salmon: 1 079
- Canned cephalopods except spread: 1 011
- Fish spread-salmon: 934
- Canned bivalves except spread: 722
- Bivalves, crustaceans and cephal spread: 627
- Fish spread-mackerel: 269
- Fish spread-sardine: 112
- Fish spread-anchovy: 7

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

- Tuna: 88
- Sardine: 72
- Mackerel: 69
- Fish spread-tuna: 49
- Canned crustaceans except spread: 47
- Anchovy: 13
- Canned cephalopods except spread: 13
- Fish spread-salmon: 12
- Salmon: 11
- Canned bivalves except spread: 10
- Bivalves, crustaceans and cephal spread: 7
- Fish spread-sardine: 7
- Fish spread-mackerel: 7
- Fish spread-anchovy: 2

Source: FranceAgriMer from Kantar Worldpanel
Spending in 2017

by presentation (million euros)

- Fish: 1,055
- Delicatessen products: 396
- Bivalves: 213
- Crustaceans: 147
- Canned products: 69
- Cephalopods: 52

by catering outlet type (million euros)

- Self-managed institutional catering: 311
- Institutional catering firm: 194
- Independent restaurant outlets: 1,224
- Restaurant chains and groups: 214

Total: 1,942 million euros

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

Fish products

Chilled delicatessen products

Shelfish products %

Crustaceans in %

Canned products en %

Céphalopodes en %

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

- **Restaurant chains and groups**:
  - Fresh products: 48%
  - Frozen products: 48%
  - Canned products: 4%

- **Independent restaurant outlets**:
  - Fresh products: 76%
  - Frozen products: 22%
  - Canned products: 2%

- **Institutional catering firms**:
  - Fresh products: 26%
  - Frozen products: 65%
  - Canned products: 9%

- **Self-managed institutional catering**:
  - Fresh products: 14%
  - Frozen products: 75%
  - Canned products: 11%

(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)

- **Restaurant chains and groups**:
  - Whole fishing products: 56%
  - Processed products: 44%

- **Independent restaurant outlets**:
  - Whole fishing products: 60%
  - Processed products: 40%

- **Institutional catering firms**:
  - Whole fishing products: 10%
  - Processed products: 90%

- **Self-managed institutional catering**:
  - Whole fishing products: 11%
  - Processed products: 89%
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

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**VI$IMer** 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